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JANUARY 10, 2024

# Retail Producer Portal Guide: Client Management

The Retail Producer Portal is a comprehensive sales and service tool for the Under 65 individual market and the Medicare markets. The portal enables you to design and deliver quotes, enroll members in Blue plans, manage prospects and serve and support active clients with a host of features. [This section covers client management functions.](#)

## Client Management

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# Client Management

## Add New Prospects

Follow these steps to add a new sales lead or prospect.

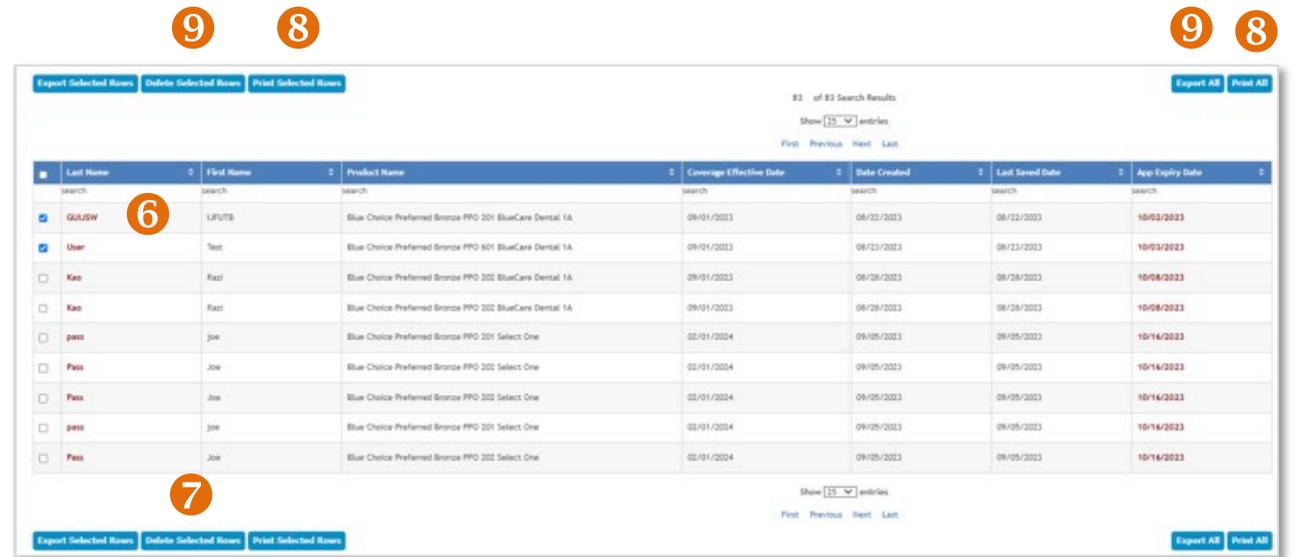
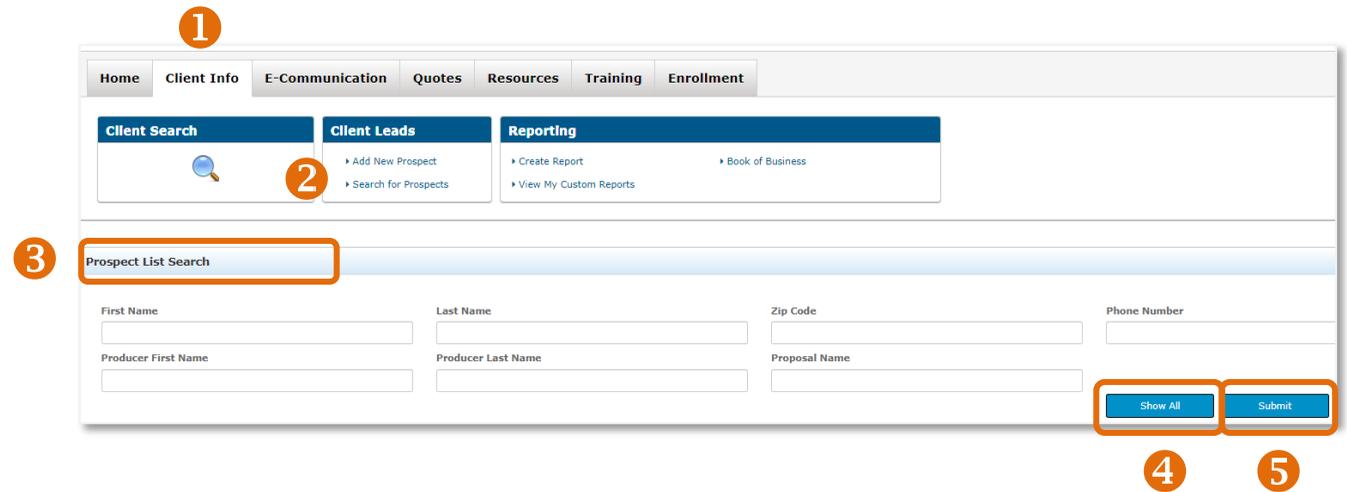
1. Select the "Client Info" tab.
2. To add a prospect, select "Add New Prospect" from the Client Leads box.
3. Enter at least the required information marked with a red asterisk: First Name, Last Name, State and Zip Code. The remaining fields (Address, City, Phone Numbers, and Email Address) are optional.
4. Click the "Save Prospect" button. A confirmation message will display when a prospect has been successfully saved. Click the "OK" button for the confirmation message.
5. When you enter a prospect's data there is also the option to "Save and Create Proposal." Selecting this option will take you directly to quoting.

The screenshot displays the 'Client Management' interface. At the top, there is a navigation bar with tabs: Home, Client Info (highlighted with a red circle 1), E-Communication, Quotes, Resources, Training, and Enrollment. Below this is a secondary navigation bar with three main sections: Client Search, Client Leads (highlighted with a red circle 2), and Reporting. The Client Leads section contains two buttons: 'Add New Prospect' and 'Search for Prospects'. The Reporting section contains 'Create Report' and 'View My Custom Reports'. Below the navigation is the 'Add New Prospect' form. The form is divided into two main sections: 'Prospect Data' (highlighted with a red circle 3) and 'Agent Information'. The 'Prospect Data' section includes fields for First Name\*, MI, Last Name\*, Address 1, Address 2, City, State\* (a dropdown menu with 'IL' selected), Zip Code\*, Phone Number, and Cell Phone. The 'Agent Information' section displays details for 'PETERSON AND ASSOCIATES PARTNERSHIP' and includes an 'Assign an Agent' button. At the bottom of the form, there are two buttons: 'Save Prospect' (highlighted with a red circle 4) and 'Save and Create Proposal' (highlighted with a red circle 5). A small asterisk note at the bottom left of the form states '\* Denotes a required field.'

# Search for Prospects

To search for a client, sales lead or prospect, follow these steps.

1. Select the "Client Info" tab.
2. To search for a prospect, select "Search for Prospects" from the Client Leads box.
3. Enter any piece of information to find a client. You can enter information in all seven fields or just one.
4. If you want to see all of your prospects, click on the "Show All" button.
5. Click the "Submit" button.
6. Matching results will display in the lower portion of the page.
7. To delete prospects, select the box next to their record and click the "Delete Selected Rows" button.
8. To print prospect records, select the box next to their record and click the "Print Selected Rows" button, or you can "Print All."
9. To export prospect records to a Microsoft Excel spreadsheet, select the box next to their record and click the "Export Selected Rows" button or you can "Export All."



## Search for a Member

You can search for clients by completing fields in the Client Search section of the Retail Producer Portal's Home page. In addition, there are many other ways to search for clients from the "Client Info" tab.

### Simple Search

1. Select the "Home" tab.
2. Enter a member's account number. **Searches must be done with the primary insured's information**, not a spouse's or a dependent's.
3. You can also enter the last four digits of the primary insured's Social Security Number.
4. Click the "Submit" button.
5. To do a more advanced search, click on the "Client Info" tab, where you have additional fields for searching.

The screenshot displays the Client Search interface. At the top, there is a navigation bar with tabs: Home, Client Info, E-Communication, Quotes, Resources, Training, and Enrollment. Below the navigation bar is the Client Search section. It features a blue header with the text "Client Search". Underneath, there are two radio button options: "Account#" and "Last 4 of SSN#". A text input field is located to the right of these options. A blue "Submit" button is positioned to the right of the input field. Numbered callouts (1-5) are overlaid on the image: 1 points to the "Home" tab, 2 points to the "Account#" radio button, 3 points to the "Last 4 of SSN#" radio button, 4 points to the "Submit" button, and 5 points to the "Client Info" tab.

## Advanced Options

1. Select the "Client Info" tab.
2. Enter content into one or more of the following fields for the **primary insured**:

### Account Information

- Account Number\*
- E-App Number: This is the number you receive after an electronic application is submitted through the Retail Producer Portal.
- Client App ID: The application ID for off-exchange electronic applications sent via a web producer's integrated platform. Only web producers use this ID.
- Exchange Assigned ID: The number from the Marketplace after an on-exchange application is submitted.
- Pending Application ID: The six character value that appears under Billing ID on an initial payment due notice sent to an applicant.

### Client Information

- Client First Name
- Client Last Name
- Last 4 of SSN\*
- Date of Birth\*
- Phone Number
- Email Address
- Zip Code

### Producer Information

- Producer First Name
- Producer Last Name
- Nine Digit Producer Number

3. Once you have entered your desired search criteria, click the "Search" button.

‡ Searching by Last Name alone may not display your client if the last name is common. This search finds the first 1,000 clients in the entire portal with that last name but displays those from that first 1,000 where you are the producer of record.

\* Searching by a member's Social Security Number (last 4 digits), Date of Birth or Account Number provides the best results.

The screenshot shows the 'Client Search' interface. At the top, there are navigation tabs: Home, Client Info (highlighted with a '1'), E-Communication, Quotes, Resources, and Training. A 'Show less' link is on the right. Below the tabs is the 'Client Search' form. It has three main sections: 'Account Information' with fields for Account Number, E-App Number, Client App ID, Exchange Assigned ID, and Pending Application ID; 'Client Information' (highlighted with an orange box and a '2') with fields for Client First Name, Client Last Name, Last 4 of SSN, Date of Birth, Phone Number, Email Address, and Zip Code; and 'Producer Information' with fields for Producer First Name, Producer Last Name, and Nine Digit Producer Number. At the bottom left is a 'Clear All' button, and at the bottom right is a 'Search' button (highlighted with a '3').

## View Search Results

Results from a client search will be displayed on the lower portion of the page. Click on the Account Number hyperlink shown in the results table. When you select the Account Number link, the member’s demographic information is displayed:

1 - 25 of 134 Search Results

Show  entries

First Previous Next Last  
Go to page  of 6 Pages

Last Name	First Name	Record Type	E-App Number	Client App ID	Member Count	Group Number	Account Number	Status	Product Type	Product Name	Coverage Effective Date	Paid To Date	Termed	Producer Name	Nine Digit Producer Number
filter	filter	filter	filter	filter	filter	filter	filter	filter	filter	filter	mm/dd/yyyy	mm/dd/yyyy	mm/dd/yyyy	filter	filter
TESTIL	TESTILONEONE	Policy	0101389016	PP97127	1	IB2121	<a href="#">123456789</a>	Grace Period	OFF-EXCHANGE	Blue Choice Preferred Bronze PPO 502	05/01/2022	12/01/2022			
TESTIL	TESTILONEONE	Policy	0101389016	PP97127	1	DI2202		Grace Period	OFF-EXCHANGE	BlueCare Dental 1B	05/01/2022	12/01/2022			
TEST	TEST	Policy	0101335573	PP81958	3	IB2803		Grace Period	OFF-EXCHANGE	Blue Choice Preferred Bronze PPO 201	01/01/2021	09/01/2021			

- Account Number
- Name
- Address
- Email Address
- Home Phone
- Cell Phone
- Work Phone
- Spouse Cell Phone
- Fax

**Client Information**

**Account Number:** 730075112

**Name:** TESTILONEONE TESTIL      **Home Phone:** (121) 304-0506      **Spouse Cell Phone:**

**Address:** 1489 E OGDEN AVE      **Cell Phone:**      **Fax:**

NAPERVILLE, IL 60563-0000      **Work Phone:**

**E-mail Address:** [SAI\\_ALEKHYA\\_MACHAVOLU@BCBSIL.COM](mailto:SAI_ALEKHYA_MACHAVOLU@BCBSIL.COM)

# Manage Documents & Questions

## Upload a Document

- You can submit documents via the portal in the following file types: PDF, JPG, JPEG, PNG, GIF, TIF, BMP.
- All file types listed here, except for PDFs, are different types of image files. PDFs are typically created using Adobe Acrobat or Adobe Reader software.
- You can upload a file up to 10 MB (or 10,000 KB) in size.**
- To reduce the size of an image file, lessen the resolution during scanning. Typically, JPG, JPEG, PNG and GIF image files are smaller in file size than TIF and BMP image files.
- If you are uploading a PDF, to compress the size of the PDF, please visit the following URL and follow the instructions: <https://www.adobe.com/acrobat/online/compress-pdf.html>

To upload a document, select the E-Communication tab and follow these steps:

- In the "Document Submission" area, click on the "Document Submission" link.
- An "Account Number" is optional.
- The "E-App Number" field is also optional. You can submit documents that don't have a corresponding e-app number.
- Select an option from the "Document Type" drop down box.
- Click the "Browse" button and navigate to the file's location. Select it. The filename will populate the "Location and Filename" field.
- Click the "Submit" button.
- You will then receive a Document Submission confirmation message. It displays the file name and tracking number you should retain for your records. Click the "OK" button.

## View Document Submissions

1. To view your documents, select the “E-Communication” tab.
2. Click on the “View Submitted Documents” link.
3. Submitted documents are displayed in a list format. The list provides a history only; documents cannot be viewed or accessed once submitted.
4. To delete a document submission, click the box next to the document in the list and select the “Delete Selected Rows” button. A message appears asking if you’re sure if you want to delete the message. Click the “OK” button to confirm.

The screenshot shows the 'E-Communication' tab selected in the navigation menu. The 'Document Submission' sidebar contains a link for 'View Submitted Documents'. The main content area displays a table of submitted documents with columns for Tracking #, Document Type, Account #, App Number, and Submitted. A 'Delete Selected Rows' button is visible at the bottom left of the table area.

	Tracking #	Document Type	Account #	App Number	Submitted
<input type="checkbox"/>	195108	New Business Application			9/28/2023 3:22 PM
<input type="checkbox"/>	195037	Other Documents			5/8/2023 1:24 PM
<input type="checkbox"/>	195036	Other Documents			5/8/2023 12:57 PM
<input type="checkbox"/>	194980	Add Dependents			4/17/2023 3:24 PM
<input type="checkbox"/>	194979	HIPAA Authorization Forms			4/17/2023 3:22 PM

## Submit a General E-Question

1. Select the "E-Communication" tab.
2. Choose the "New E-Question" link.
3. Select the "General E-Question" option for general questions not related to a specific member.
4. Enter a "Subject."
5. Post your question.
6. Click on the "Submit" button.

The screenshot shows the 'E-Communication' tab selected in the top navigation bar. Below the navigation bar, there are two main sections: 'E-Questions' and 'Document Submission'. The 'E-Questions' section has a 'New E-Question' link highlighted with a red box. The 'Document Submission' section has 'Document Submission' and 'View Submitted Documents' links. Below these is the 'Submit E-Question' form. The form has a heading 'Submit E-Question' and a sub-heading 'Please select type of E-Question'. There are two radio buttons: 'General E-Question' (selected) and 'Member Specific E-Question'. Below the radio buttons is a paragraph: 'To submit an e-question, fill in the form below and submit your request. You will receive notification once the e-question is received and processed.' There are two required fields: 'Subject \*' and 'Question \* (Max limit of 1000 characters)'. The 'Submit' button is at the bottom right.

## Submit a Member-Specific E-Question

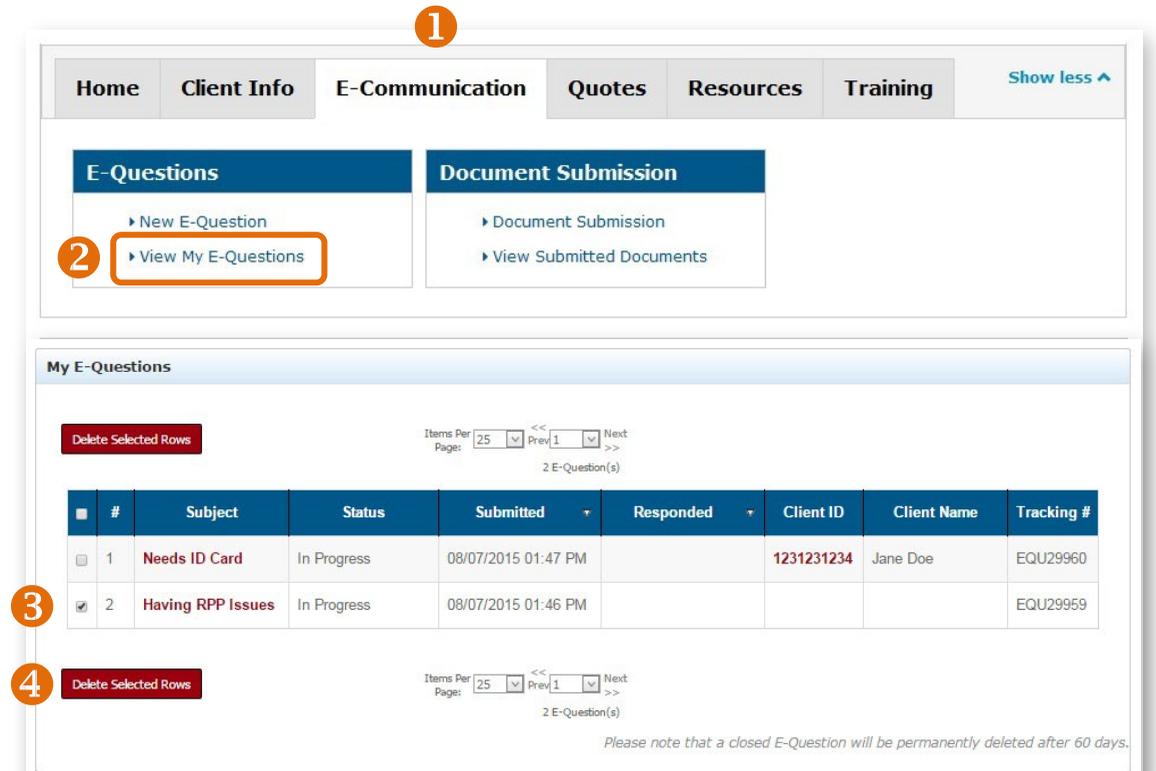
1. Select the "E-Communication" tab.
2. Choose the "New E-Question" link.
3. Select the "Member Specific E-Question" option for questions related to a specific member.
4. Enter the required information for the member/client.
5. Enter a "Subject."
6. Post your question.
7. Click on the "Submit" button.
8. You'll receive a confirmation message. Click the "OK" button.

The screenshot displays the 'E-Communication' tab in the portal. A callout '1' points to the 'E-Communication' tab. Below it, the 'E-Questions' section has a callout '2' pointing to the 'New E-Question' link. The 'Document Submission' section contains links for 'Document Submission' and 'View Submitted Documents'. The 'Submit E-Question' form has a callout '3' pointing to the 'Member Specific E-Question' radio button. Below this, there are input fields for 'Client's First Name \*', 'MI', 'Client's Last Name \*', and 'Client ID# \*', with callout '4' pointing to the first name field. A 'Subject \*' field has callout '5'. A large text area for the 'Question \*' (with a note '(Max limit of 1000 characters)') has callout '6'. A 'Submit' button has callout '7'. An 'E-Question Submitted' modal window is shown at the bottom, with callout '8' pointing to the 'OK' button. The modal text reads: 'Your E-Question regarding John Public has been submitted. Your tracking number is #EQU396.' and includes a 'Go to My E-Questions' button.

## Delete an E-Question

If you submitted an E-Question that is no longer relevant or is incorrect, you can easily delete it.

1. Select "E-Communication" tab.
2. Choose the "View My E-Questions" link.
3. Select the box beside the E-Question you want to delete.
4. Select the "Delete Selected Rows" button.
5. When the confirmation box appears, click "OK."



The screenshot displays the Client Management portal interface. At the top, the navigation tabs include Home, Client Info, E-Communication (1), Quotes, Resources, and Training. Below the tabs, there are two main sections: E-Questions and Document Submission. In the E-Questions section, the 'View My E-Questions' link is highlighted with a red box (2). Below this, the 'My E-Questions' section shows a table with two rows. The second row, 'Having RPP Issues', is selected with a checkbox (3). A red 'Delete Selected Rows' button is highlighted (4). The table has columns for #, Subject, Status, Submitted, Responded, Client ID, Client Name, and Tracking #. Below the table, there is a confirmation dialog box (5) with the text: 'The page at https://osc.hcsc.net says: Are you sure you want to delete the selected row/s?' and buttons for OK and Cancel.

#	Subject	Status	Submitted	Responded	Client ID	Client Name	Tracking #
1	Needs ID Card	In Progress	08/07/2015 01:47 PM		1231231234	Jane Doe	EQU29960
2	Having RPP Issues	In Progress	08/07/2015 01:46 PM				EQU29959

## Order Permanent ID Cards

You can order permanent ID cards for mail delivery from the Client Detail page in your portal account.

Marketplace (on exchange) policies require at least 24 hours after application submission before ID cards are available. For non-Marketplace (off exchange) policies, ID cards are often available right away.

1. After finding a member from completing a simple search from the "Home" tab or an advanced search from the "Client Info" tab, select "Generate ID Cards" from the dropdown menu and click the "GO" button.
2. Choose "Permanent ID Cards."
3. Click the "Next" button.

Back to Search Results Submit E-Question

1 Generate ID Cards GO

▼ Client Information

Account Number:	Home Phone:	Spouse Cell Phone:
Name:	Cell Phone:	Fax:
Address:	Work Phone:	
E-mail Address:		

Policy Fulfillment Request

Please Select...

Temporary ID Cards

Permanent ID Cards 3

Cancel Next >

## Order Permanent ID Cards (continued)

4. Select the policy type. You can select an ID card for a medical or dental policy.
5. For plans that require a Primary Care Physician (PCP), select the member needing the card. Each member selected receives a separate ID Card with his or her own PCP information. For plans that don't require a PCP, you don't have to select a member's name. For these cards, only the primary insured's name is included.
6. For Permanent ID Cards, you can request one ID card per family member, for plans that require a PCP. For plans that don't require a PCP, you can request multiple ID cards at once.

**Policy Fulfillment Request Detail Screen (Member ID: 000000000000)**

**Permanent Replacement ID Card**

**Blue Precision Bronze HMO 205**  
Doe, Jane (Primary)

Number of Id cards requested:

**Blue Precision Bronze HMO 205**  
Doe, John (Dependent)

Number of Id cards requested:

**Blue Precision Bronze HMO 205**  
Doe, Michael (Dependent)

Number of Id cards requested:

**Policy Fulfillment Request Policy and Member Selection Screen - Permanent IDs**

**Please select the policy:**

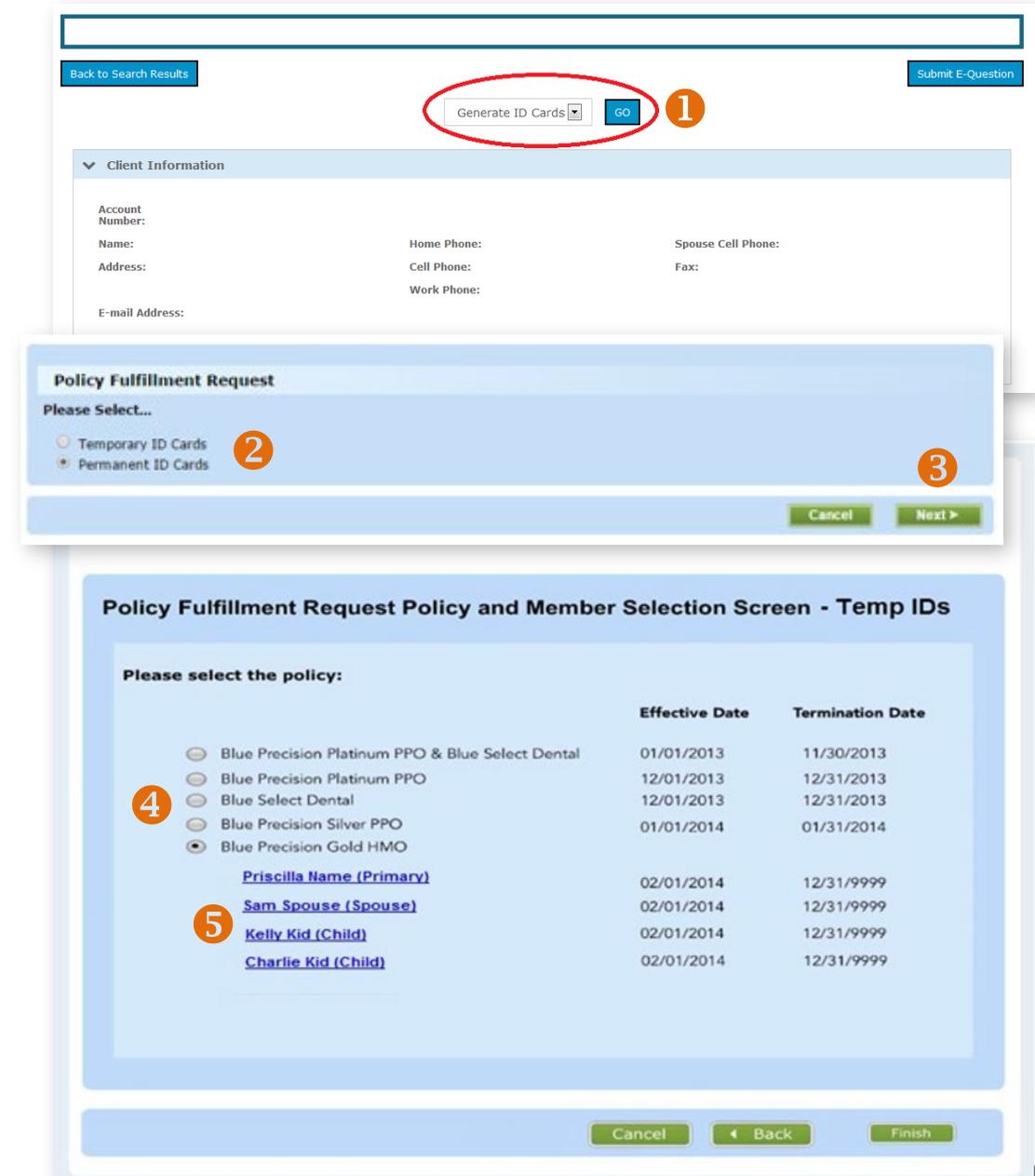
	Effective Date	Termination Date
<input type="radio"/> Blue Precision Platinum PPO & Blue Select Dental	01/01/2013	11/30/2013
<input type="radio"/> Blue Precision Platinum PPO	12/01/2013	12/31/2013
<input type="radio"/> Blue Select Dental	12/01/2013	12/31/2013
<input type="radio"/> Blue Precision Silver PPO	01/01/2014	01/31/2014
<input checked="" type="radio"/> Blue Precision Gold HMO		
<input type="radio"/> Priscilla Name (Primary)	02/01/2014	12/31/9999
<input checked="" type="checkbox"/> Sam Spouse (Spouse)	02/01/2014	12/31/9999
<input checked="" type="checkbox"/> Kelly Kid (Child)	02/01/2014	12/31/9999
<input type="checkbox"/> Charlie Kid (Child)	02/01/2014	12/31/9999
<input type="radio"/> Select All		

# Generate Temporary ID Cards

1. After finding a member from completing a simple search from the "Home" tab or an advanced search from the "Client Info" tab, select "Generate ID Cards" from the dropdown menu and click the "GO" button.
2. Choose "Temporary ID Cards"
3. Click the "Next" button.
4. Select a policy.
5. For plans that **require** a Primary Care Physician, you must select the member needing the ID Card. Each member selected receives a separate ID Card with the Primary Care Physician information included.

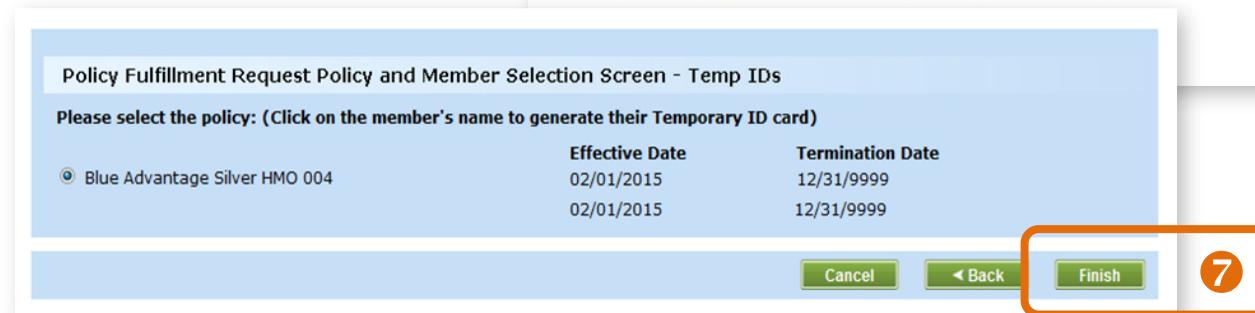
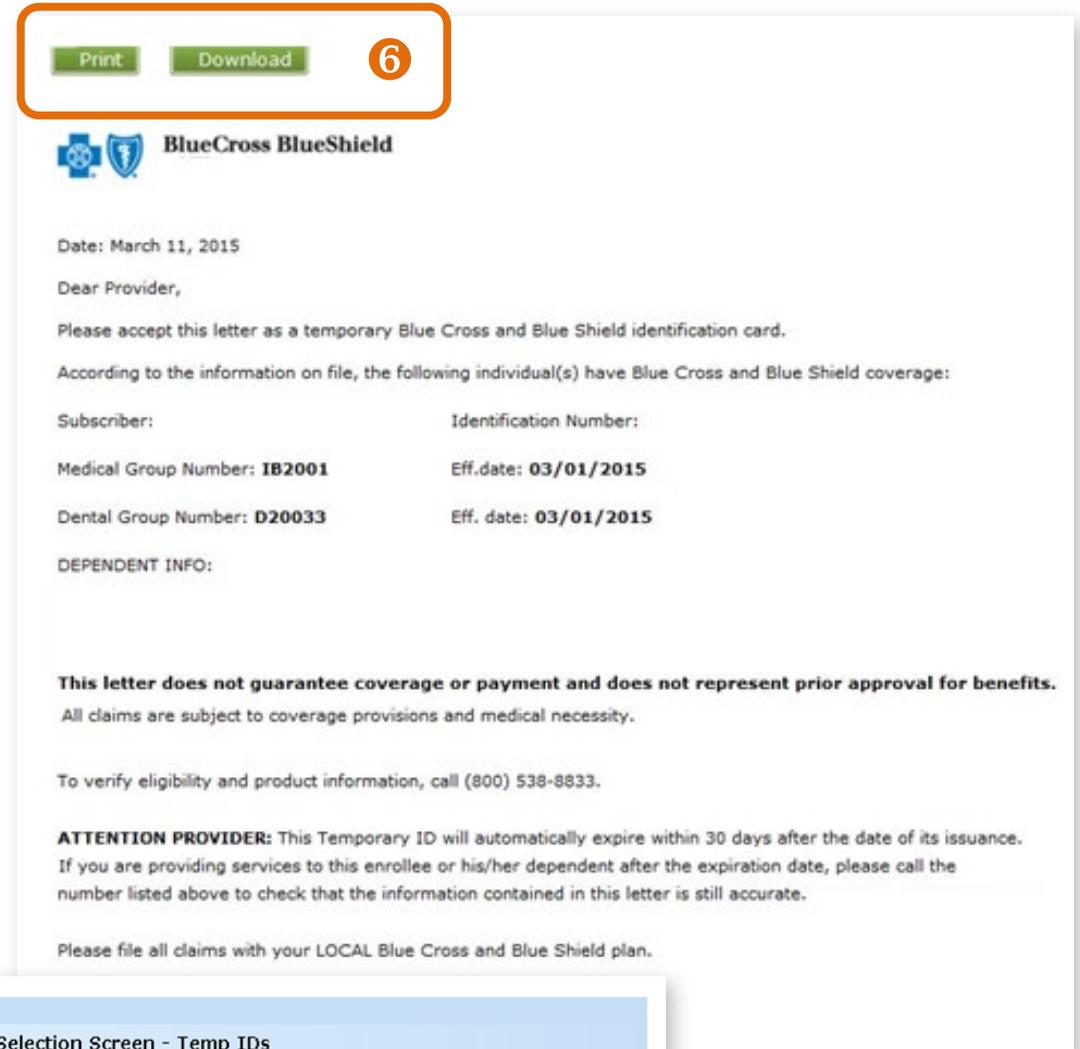
For plans that **do not require** a Primary Care Physician, you do not have to select a member's name. For these ID Cards, only the primary insured's name is on the ID Card.

Click on the member's link to generate the ID Card.



## Generate Temporary ID Cards (continued)

6. Temporary ID Card requests will generate a file that allows the user to "Print" or "Download" the ID Card. If you download and save Temporary ID Card files, you can then email the files to clients. If clients are with you, you can print the files and hand it to them before they leave your office.
7. Once the downloading or printing is completed, you can select "Finish" to go back to the member's information page.



# Change Primary Care Physician

The Retail Producer Portal allows you to make a Primary Care Physician (PCP) change for a client.

1. After finding a member from completing a simple search from the "Home" tab or an advanced search from the "Client Info" tab, select "Change PCP" from the dropdown menu and click the "GO" button.
2. When the "Provider Change" page opens, select the member name needing the PCP change.
3. Click on the "Provider Finder" link. Locate the Medical Group / PCP/ PCPA / NPI number(s) for the new PCP.
4. Put a check mark in the box(es) beside the name(s) of the members needing the PCP change.
5. Enter the Medical Group / PCP/ PCPA / NPI number.
6. Select the "Search" button. See the following page for next steps.

Welcome Tilda McMasters

**Provider Change** (Member ID: )

Provider Change Options 2 Active Member(s)

To find a Doctor click [Provider Finder](#) 3

Member	Plan	DOB	Effective Date	Termination Date	History
<input checked="" type="checkbox"/> UATILCURRENTPLAN UATILFUTUREPLAN (Primary)	Blue Precision Gold HMO <sup>SM</sup> 001	01/01/1971	05/01/2015	12/31/9999	🔍
<input checked="" type="checkbox"/> UATILSPOUSECURRENT UATILFUTUREPLAN (Spouse)	Blue Precision Gold HMO <sup>SM</sup> 001	01/01/1981	05/01/2015	12/31/9999	🔍

Provider Search

Medical Group / PCP / PCPA / NPI Number 4  5

Effective Date  6 Term Date  6

## Change Primary Care Physician (continued)

1. After you click the "Search" button, the new PCP information is displayed.
2. Choose a reason for changing provider(s) from the "Provider Change Reason" dropdown list located in the Provider Assignment section.
3. Click the "Validate" button.
4. If the reason selected is not valid, an error message will display at the bottom of the page and a new reason selection must be made.

Member	Provider Change Reason
UATILCURRENTPLAN UATILFUTUREPLAN (Primary)	Concern With Service
UATILSPOUSECURRENT UATILFUTUREPLAN (Spouse)	Asked Out

**Error(s):**

- UATILSPOUSECURRENT UATILFUTUREPLAN (Spouse)
  - Member was previously asked out of this Medical Group, please select a new Medical Group

**Provider Change** (Member ID: )

Provider Change Options: Active Member(s) To find a Doctor click [Provider Finder](#)

Active Member(s)

Provider Search

Medical Group / PCP / PCPA / NPI Number: 124

Effective Date: 08/01/2015 Term Date: 12/31/9999 1 Search

08/01/2015-12/31/9999

Medical Group #: 124 Medical Group Name: ADVOCATE LUTHERAN GENERAL PHYS PARTNERS

Provider Assignment

Member	Provider Change Reason	Group
UATILCURRENTPLAN UATILFUTUREPLAN (Primary)	-- select -- Referral Problems Retired New Member Benefit Not Supported No Reason Given New Enrollee Member Preferred One Doctor For Family Members Former Provider In Network Doctor/Med Grp Location Left Network (Closed) Hospital Affiliated Dependent Age Concern With Service Change Of Residence Concern With Physician Concern With Access Asked Out	
UATILSPOUSECURRENT UATILFUTUREPLAN (Spouse)	-- select --	

3

Cancel Validate

## Change Primary Care Physician (continued)

5. If you do not receive an Error message, verify the PCP changes are correct
6. Select the "Finish" button.
7. A message appears that the change was successful and new ID Cards were generated.

**Provider Change**

**Provider Change Confirmation**

**John Doe (primary)** ▼

	Current	Updated
Medical Group #	597	<input checked="" type="checkbox"/> 124
Medical Group Name	BCBS HMO ILLINOIS	<input checked="" type="checkbox"/> ADVOCATE LUTHERAN GENERAL PHYS PARTNERS
Effective Date	07/01/2015	<input checked="" type="checkbox"/> 08/01/2015
Term Date	12/31/9999	12/31/9999
Request Received Date	06/10/2015	<input checked="" type="checkbox"/> 07/30/2015
Provider Assigned By	Selected by member	Selected by member
Provider Change Reason	No Reason Given	<input checked="" type="checkbox"/> Concern With Service

**Jane Doe (spouse)** ▼

	Current	Updated
Medical Group #	597	<input checked="" type="checkbox"/> 124
Medical Group Name	BCBS HMO ILLINOIS	<input checked="" type="checkbox"/> ADVOCATE LUTHERAN GENERAL PHYS PARTNERS
Effective Date	06/01/2015	<input checked="" type="checkbox"/> 08/01/2015
Term Date	12/31/9999	12/31/9999
Request Received Date	05/22/2015	<input checked="" type="checkbox"/> 07/30/2015
Provider Assigned By	Selected by member	Selected by member
Provider Change Reason	Data Entered Incorrectly	<input checked="" type="checkbox"/> Asked Out

Please verify the changes made. If the information is correct, select "Finish" to complete the workflow and save the changes made. If the information is not correct, please select "Back" to make changes.

Back
Cancel
Finish & Re-Launch
Finish

**Provider Change** (Member ID: )

**Success:**  
The transaction was successful and all applicable ID cards were requested.

1/10/2024

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## Change Primary Care Physician (continued)

### PCP Changes

Each client's PCP can only be updated one time, per transaction. Reasons for changing a PCP include:

- Change Of Residence
- Changed For Application
- Concern With Access
- Concern With Physician
- Concern With Service
- Dependent Age
- Doctor/Med Grp Location
- Hospital Affiliated
- Left Network (Closed)
- Member Preferred One Doctor For Family
- Members Former Provider In Network
- New Enrollee
- New Member Benefit Not Supported
- No Reason Given
- PCP Not Accepting New Patients
- Referral Problems
- Retired

### Provider Termination Dates

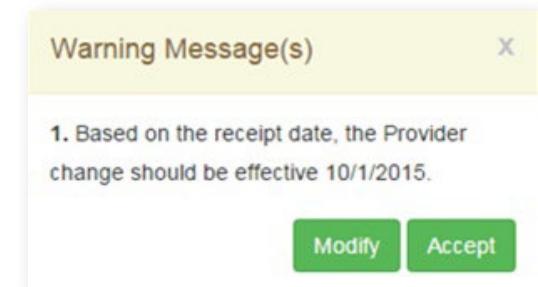
You don't need to enter a termination date for the new PCP. The termination date will automatically default to December 31, 9999. The new PCP assignment will remain in effect until the member makes another change or until coverage ends. Please do not alter the date.

### Selecting Two PCPs

A client may have a PCP for one period of time and another PCP effective on a future date. (Example: PCP 1 is effective from October 1 to December 31, and PCP 2 is effective from January 1 onward.) If the client wants two different PCPs for two different time periods, you will need to complete two separate PCP update transactions. Examples of when this might take place are when a PCP is leaving a network or when a client is moving to a new policy/network in the future.

### Effective Dates for PCPs

In some instances, depending on the state, an effective/start date for a PCP can only be on the first of the month. In those cases, a "Warning Message(s)" will display. You may click "Accept" or "Modify" if you wish to change the effective date of the new PCP selection.



## Change Client Information

Producers have the ability to change contact information – phone numbers and email addresses – on their clients’ behalf. When submitted, these changes are updated in our member systems **in approximately 4 hours**.

Producers do not have access to change the contact information of spouses or dependents\*. They can only change contact information for the primary insured. After updating an email address or telephone number, allow up to 4 hours for the client information to refresh in the Retail Producer Portal.

1. After finding a member from completing a simple search from the "Home" tab or an advanced search from the "Client Info" tab, select "Contact Info Change" from the dropdown menu and click "GO".
2. Make all applicable contact info changes. When adding a telephone number, select an option from the "Type" drop down list. If an existing telephone number does not have a designated type, make a selection now or an error message will display when you click the "Next" button.
3. Click the "Next" button.

\* **NOTE: A dependent under the age of 18 is required to use the telephone number and email address of the primary insured. Others on the policy can change their contact information via their Blue Access for Members account or by calling customer service, whose number is on the back of their member ID cards.**

## Change Client Information (continued)

4. Confirm changes are correct.
5. Select "Finish."
6. A message should appear that the updates were successfully saved.
7. If there is an issue, an error message will display. Follow instructions and click the "OK" button.

**Contact Info Change Confirmation**

**Name:** TANYA WASHINGTON (Primary)

**Phone Number**

Current				Updated			
Type	Phone Number	Extension	Send Text	Type	Phone Number	Extension	Send Text
Home Phone Number	(123) 123-6677		No	Cellular Phone Number	(123) 123-4455		No
EmailAddress	IL@SDF.COM				AGEN@AGEN.COM		

Please verify the changes made. If the information is correct, select "Finish" to complete the workflow and save the changes made. If the information is not correct, please select "Back" to make changes.

Cancel   ◀ Back   **Finish**

Your updates were successfully saved.

Your request was unsuccessful.

**Error(s) from MemberManagement service:**

- UATILSPOUSECURRENT UATILFUTUREPLAN (Spouse): No change to the existing record

Please contact IT Help Desk (312) 653-6675.

Click OK to continue.

**OK**