BlueCross BlueShield
Illinois · Montana · New Mexico
Oklahoma · Texas

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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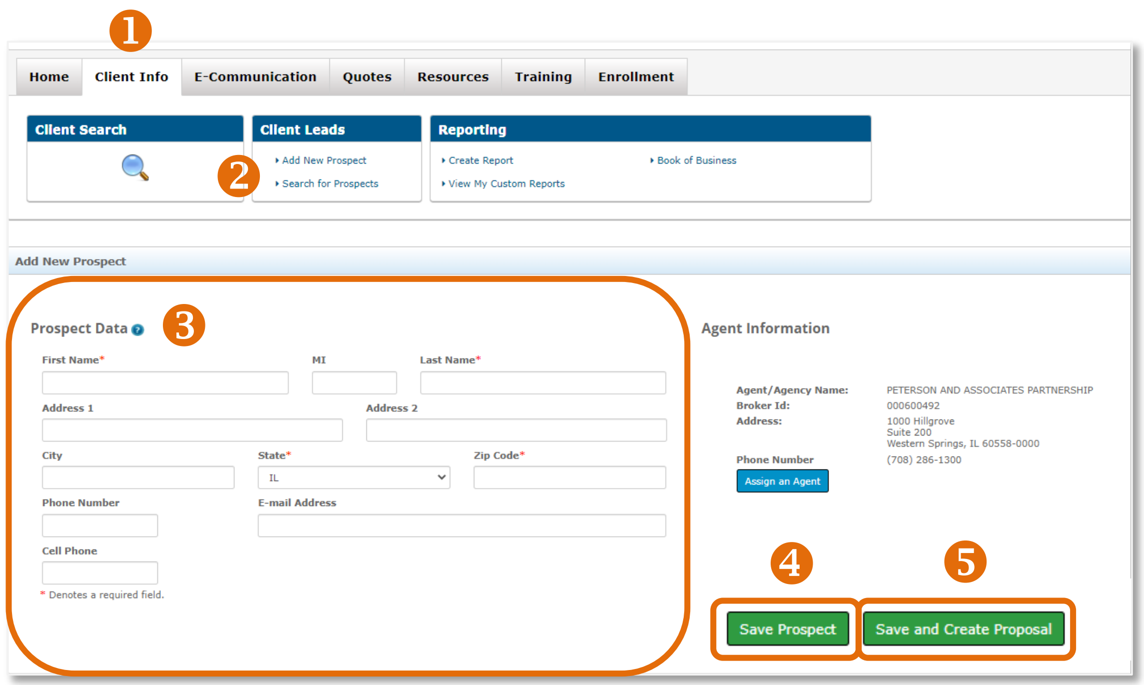
Client Management

Add New Prospects

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

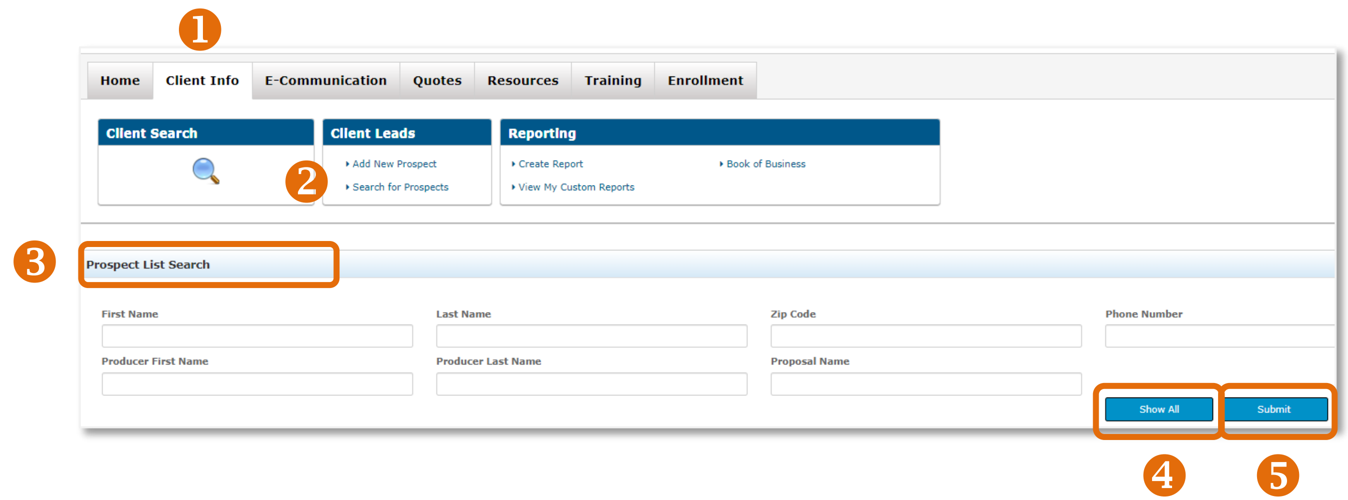
1. Select the "Client Info" tab.
2. To add a prospect, select "Add New Prospect" from the Client Leads box.
3. Enter at least the required information marked with a red asterisk: First Name, Last Name, State and Zip Code. The remaining fields (Address, City, Phone Numbers, and Email Address) are optional.
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.

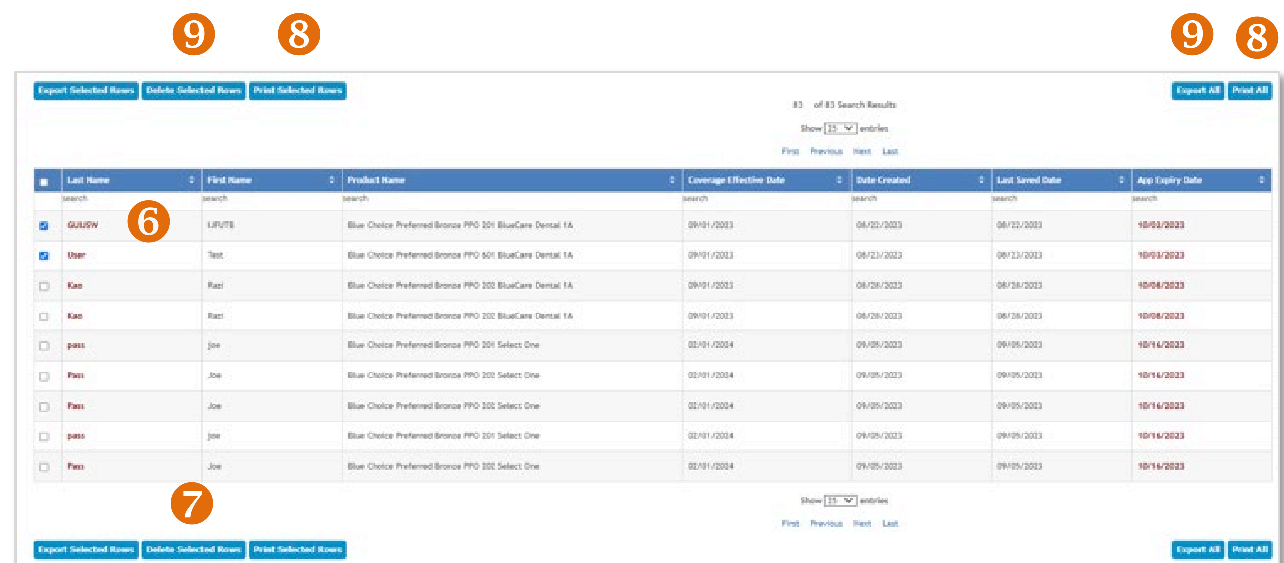


Search for Prospects

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."



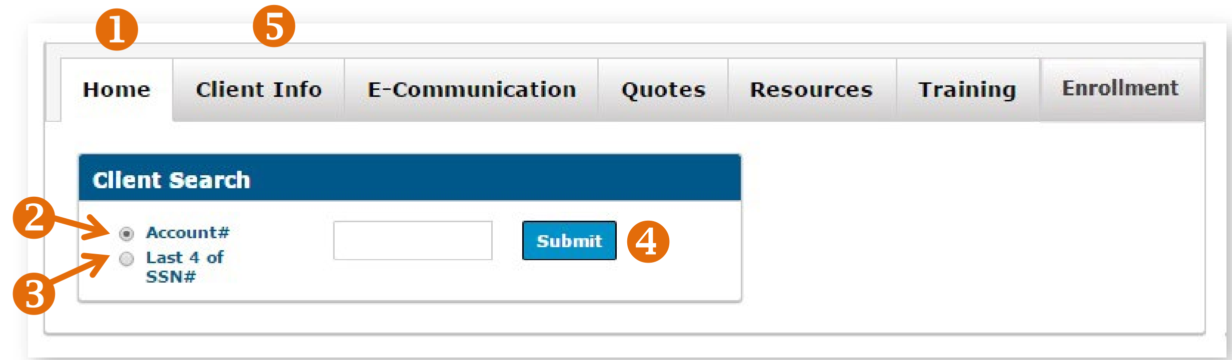


Search for a Member

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.



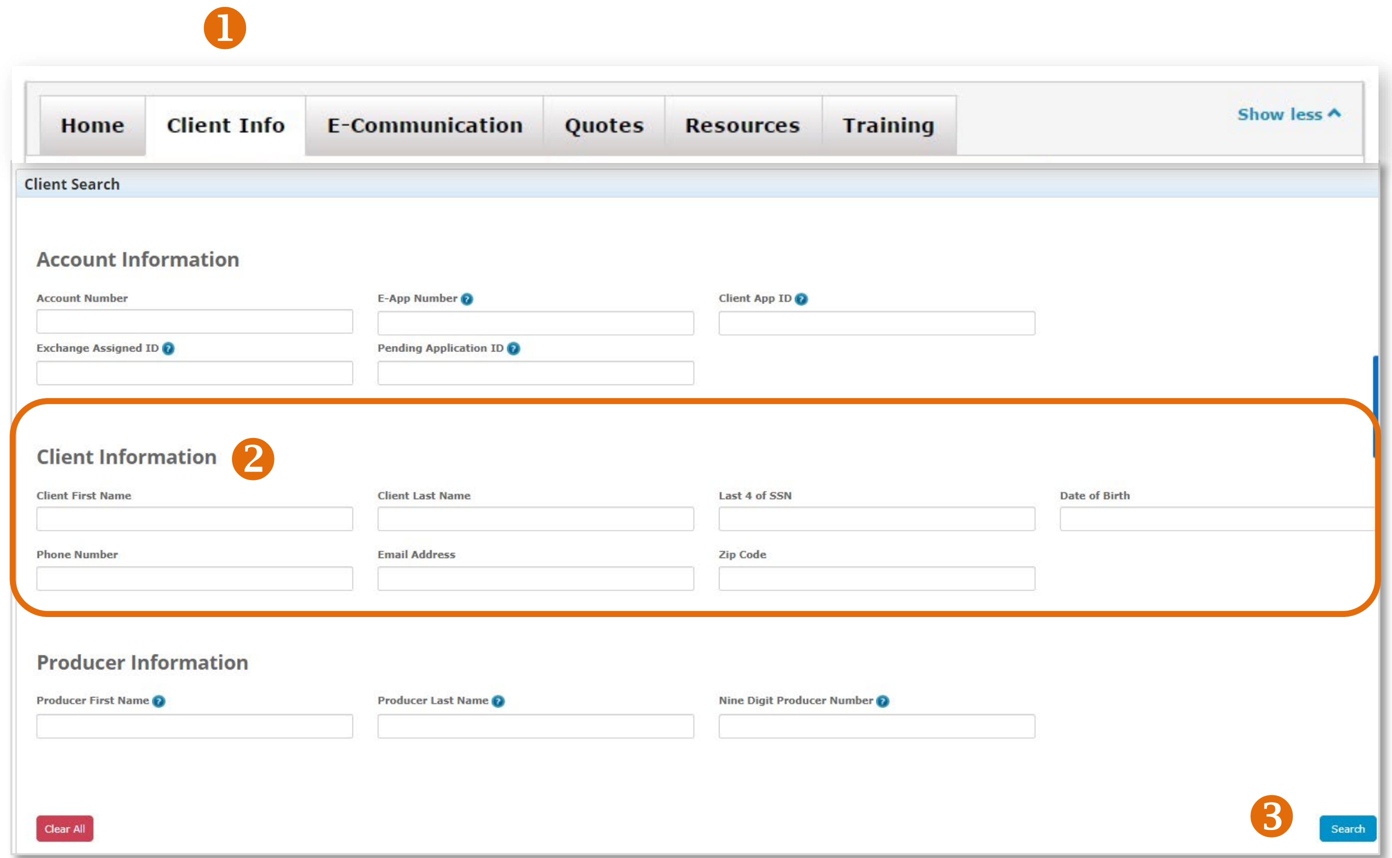
Advanced Options

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



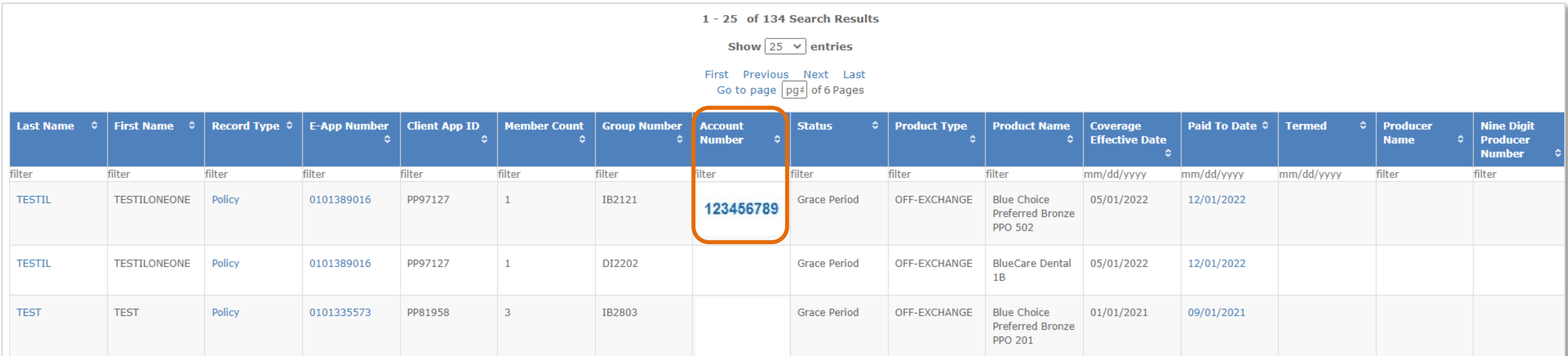
3. Once you have entered your desired search criteria, click the “Search” button.

‡ 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.**

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

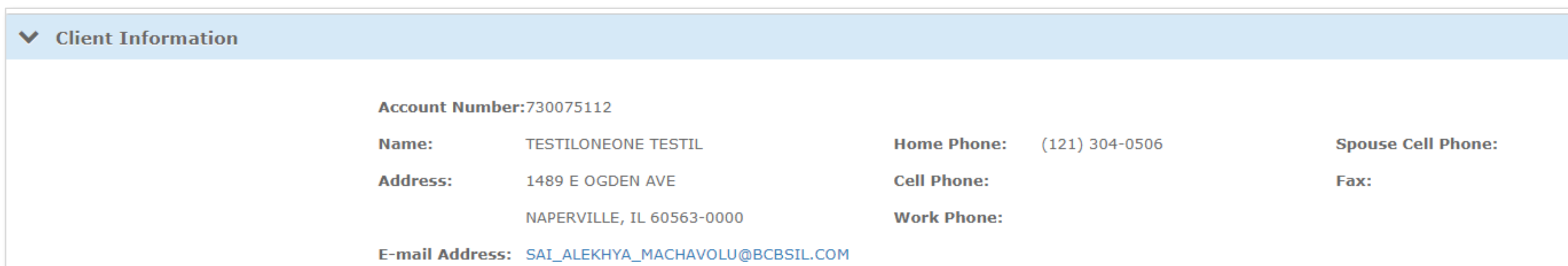
Show 25 entries

First Previous Next Last

Go to page pg# 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	123456789	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			

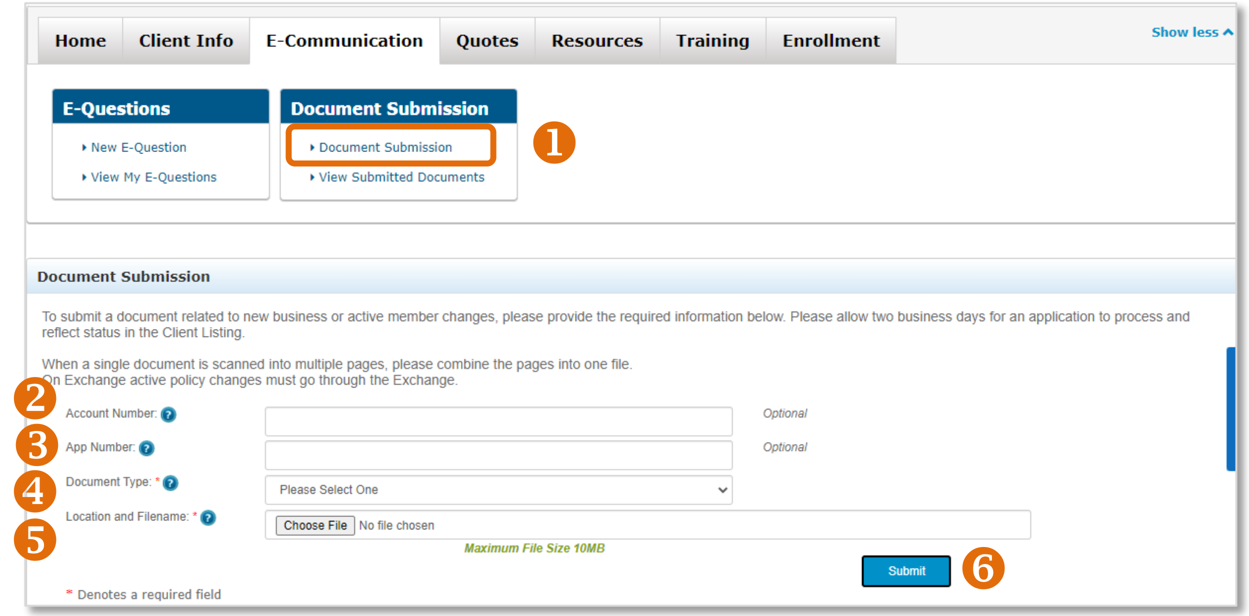
- Account Number
- Name
- Address
- Email Address
- Home Phone
- Cell Phone
- Work Phone
- Spouse Cell Phone
- Fax

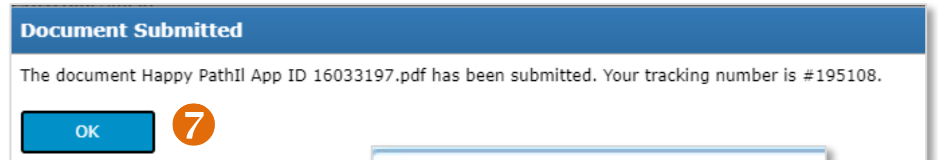


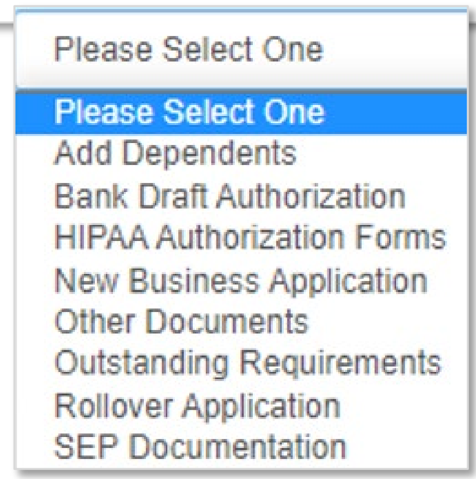
Manage Documents & Questions

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





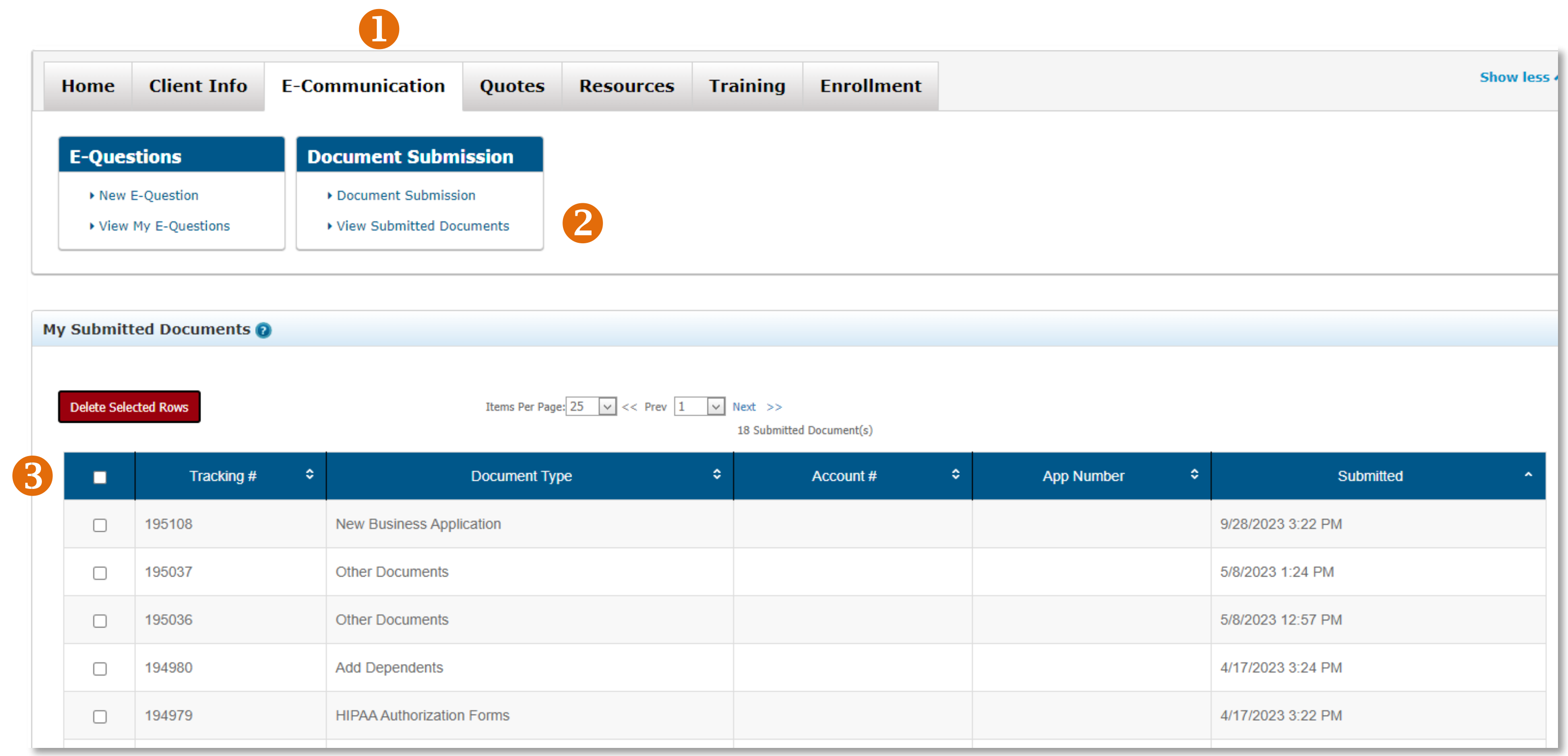


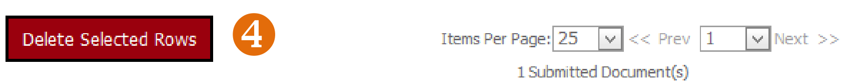
To upload a document, select the E-Communication tab and follow these steps:

1. In the "Document Submission" area, click on the "Document Submission" link.
2. An "Account Number" is optional.
3. The "E-App Number" field is also optional. You can submit documents that don't have a corresponding e-app number.
4. Select an option from the "Document Type" drop down box.
5. Click the "Browse" button and navigate to the file's location. Select it. The filename will populate the "Location and Filename" field.
6. Click the "Submit" button.
7. 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

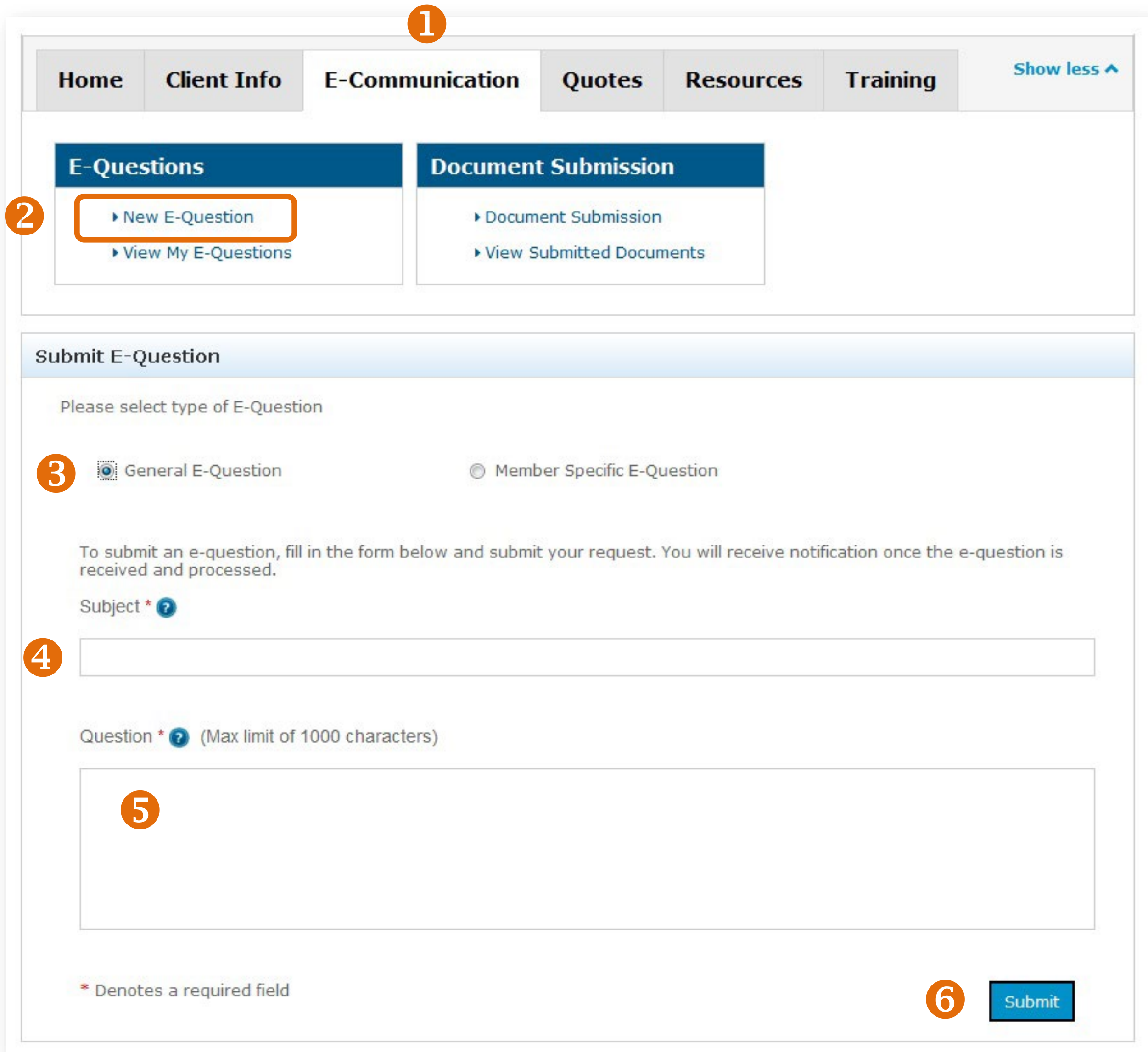
1. To view your documents, select the "E-Communication" tab.
2. Click on the "View Submitted Documents" link.
3. Submitted documents are displayed in a list format. The list provides a history only; documents cannot be viewed or accessed once submitted.
4. To delete a document submission, click the box 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.





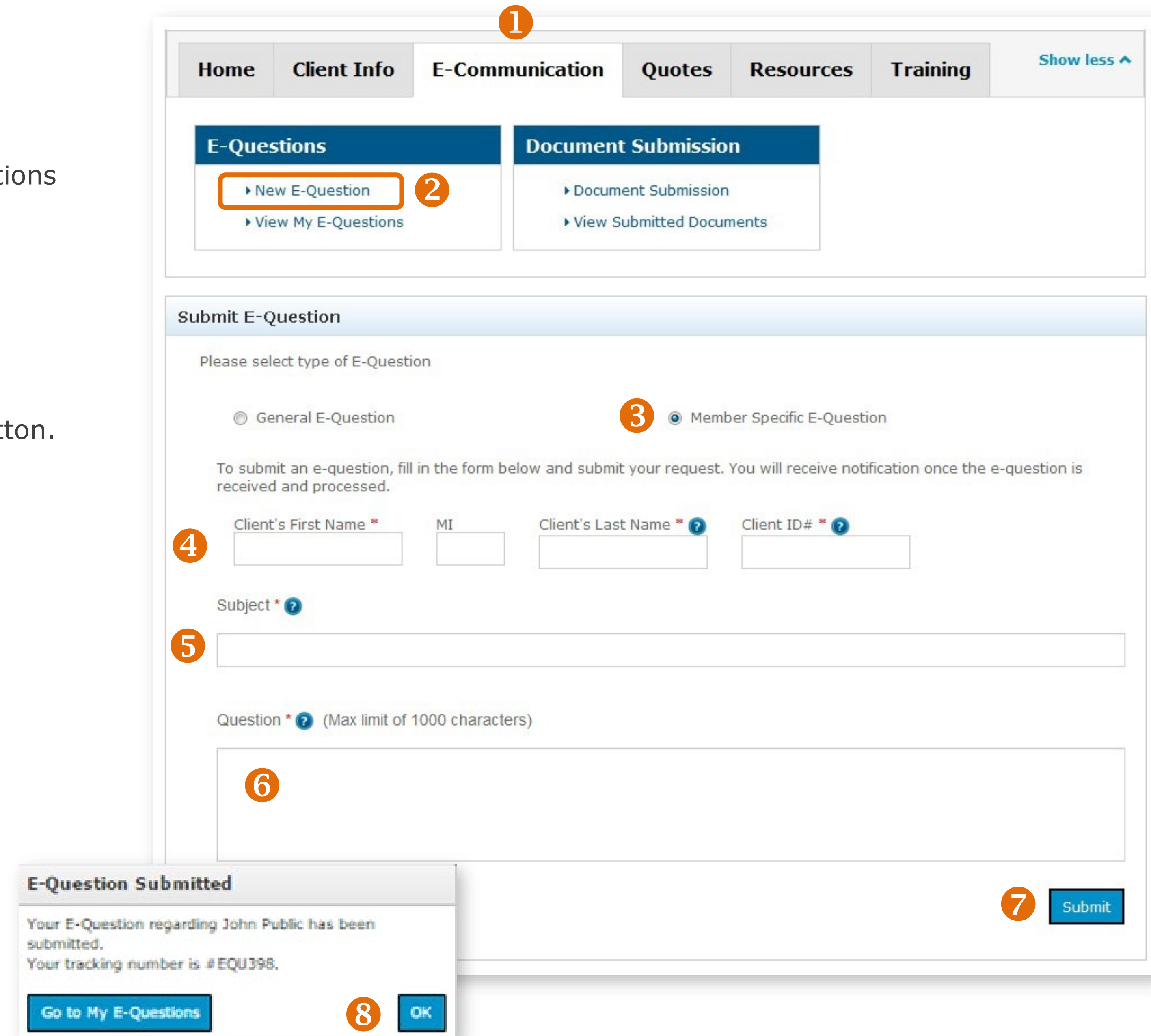
Submit a General E-Question

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.



Submit a Member-Specific E-Question

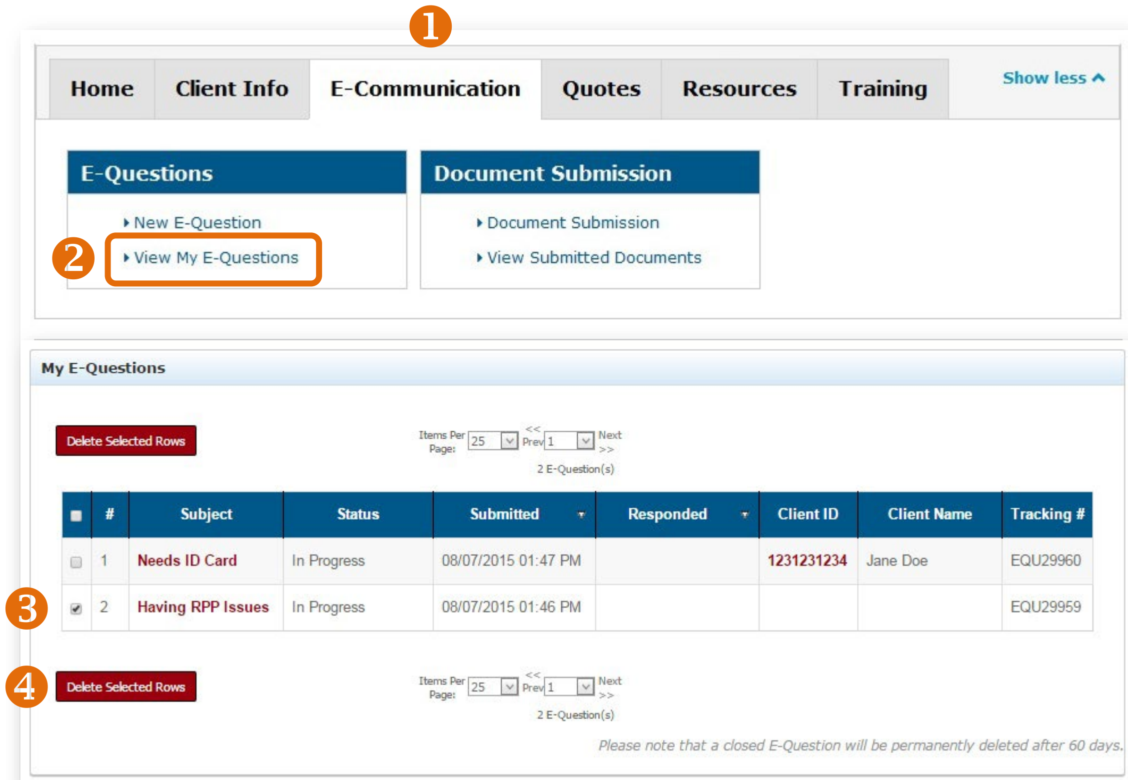
1. Select the "E-Communication" tab.
2. Choose the "New E-Question" link.
3. Select the "Member Specific E-Question" option for questions related to a specific member.
4. Enter the required information for the member/client.
5. Enter a "Subject."
6. Post your question.
7. Click on the "Submit" button.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

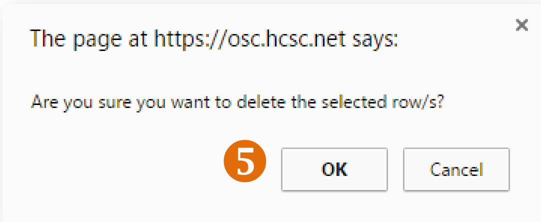


Delete an E-Question

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."



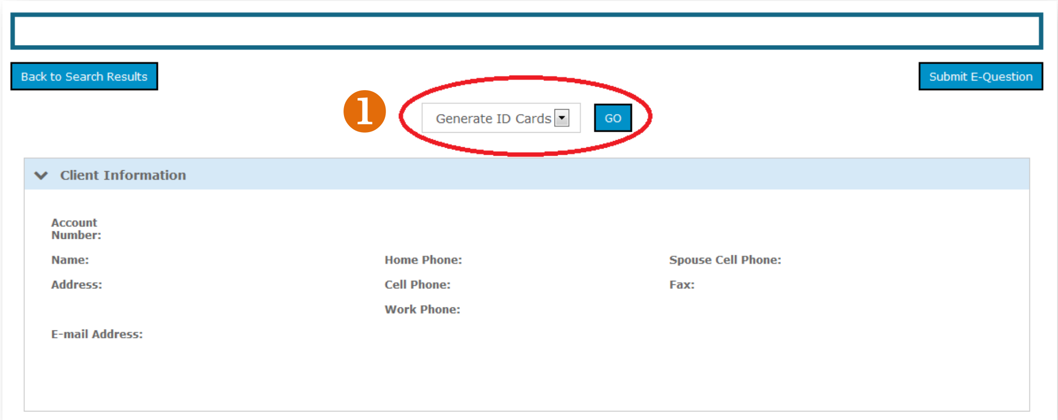


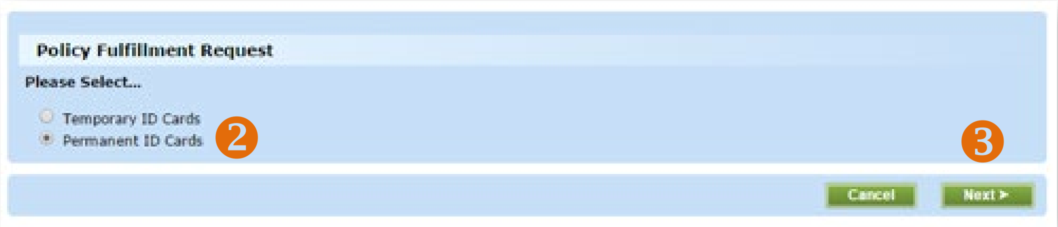
Order Permanent ID Cards

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.

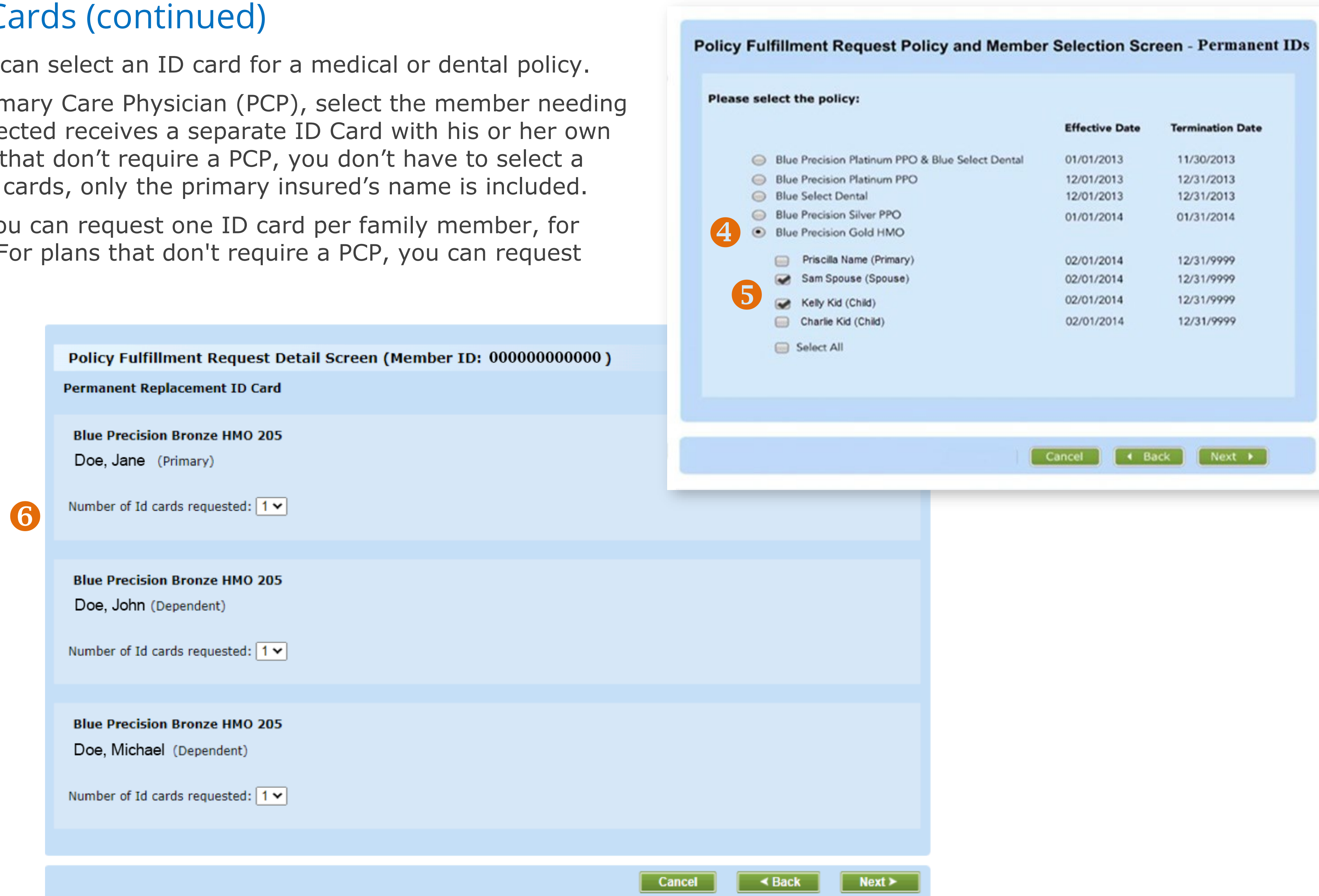
1. After finding a member from completing a simple search from the "Home" tab or an advanced search from the "Client Info" tab, select "Generate ID Cards" from the dropdown menu and click the "GO" button.
2. Choose "Permanent ID Cards."
3. Click the "Next" button.





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.

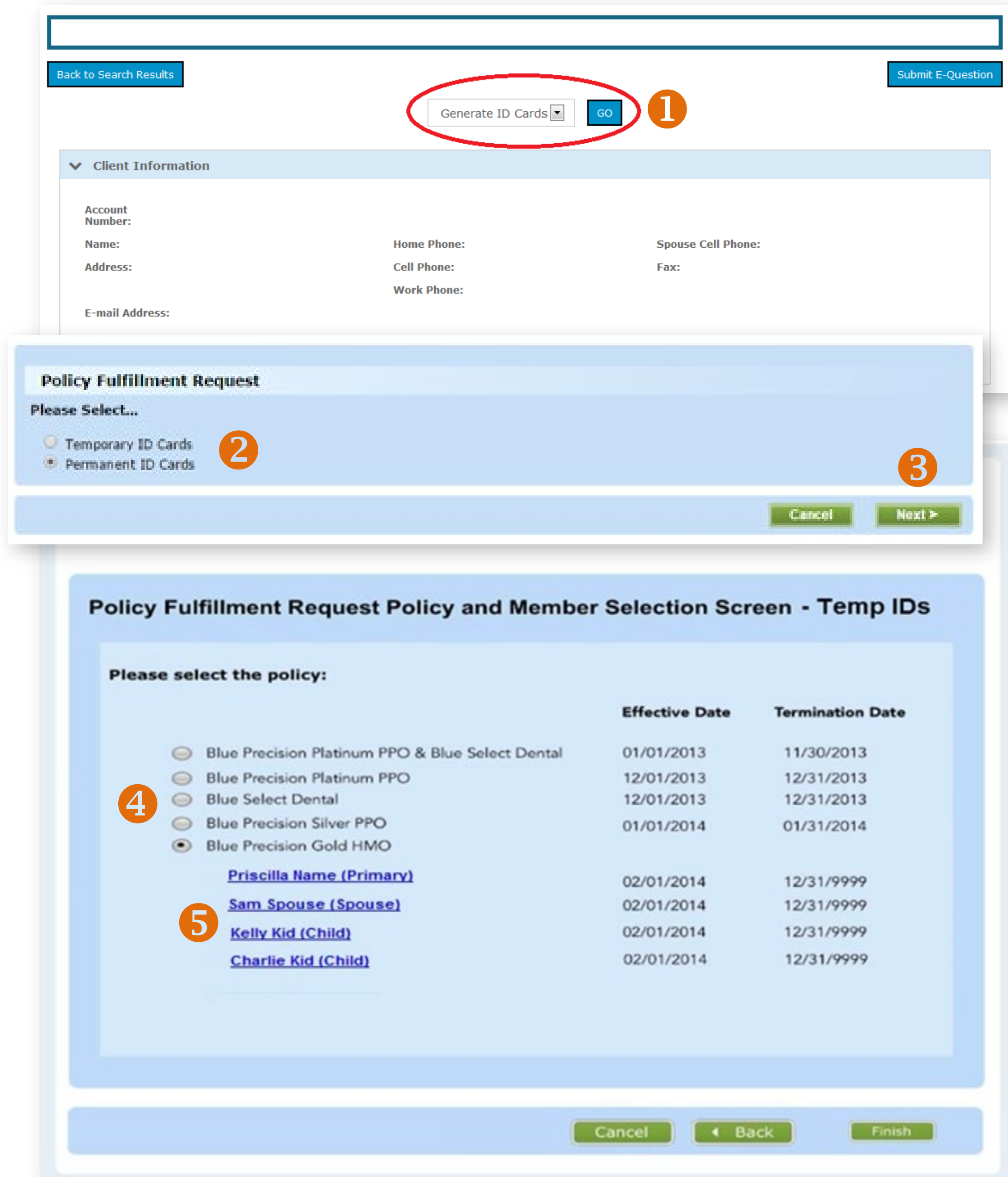


Generate Temporary ID Cards

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.

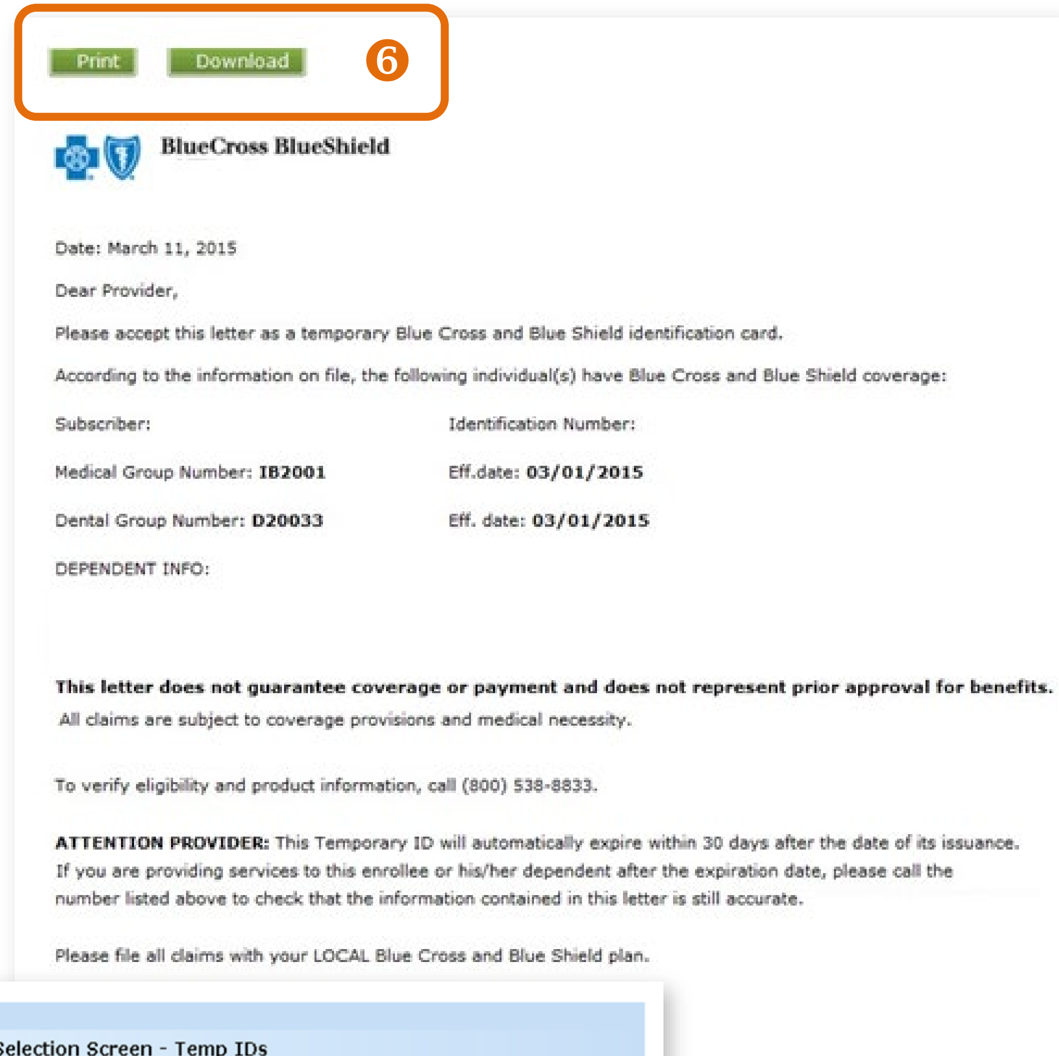
   For plans that do not require a Primary Care Physician, you do not have to select a member's name. For these ID Cards, only the primary insured's name is on the ID Card.

   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.


Print Download 6

BlueCross BlueShield

Date: March 11, 2015

Dear Provider,

Please accept this letter as a temporary Blue Cross and Blue Shield identification card.

According to the information on file, the following individual(s) have Blue Cross and Blue Shield coverage:

Subscriber:	Identification Number:
Medical Group Number: **IB2001**	Eff.date: **03/01/2015**
Dental Group Number: **D20033**	Eff. date: **03/01/2015**

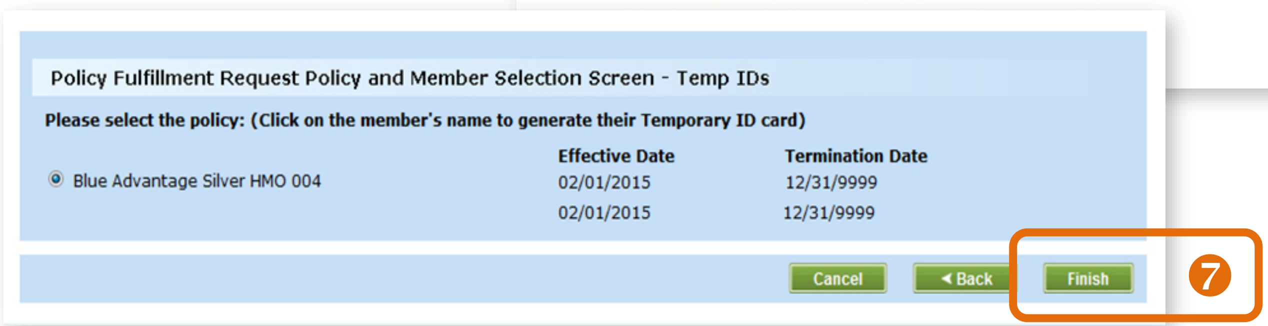
DEPENDENT INFO:

This letter does not guarantee coverage or payment and does not represent prior approval for benefits. All claims are subject to coverage provisions and medical necessity.

To verify eligibility and product information, call (800) 538-8833.

ATTENTION PROVIDER: This Temporary ID will automatically expire within 30 days after the date of its issuance. If you are providing services to this enrollee or his/her dependent after the expiration date, please call the number listed above to check that the information contained in this letter is still accurate.

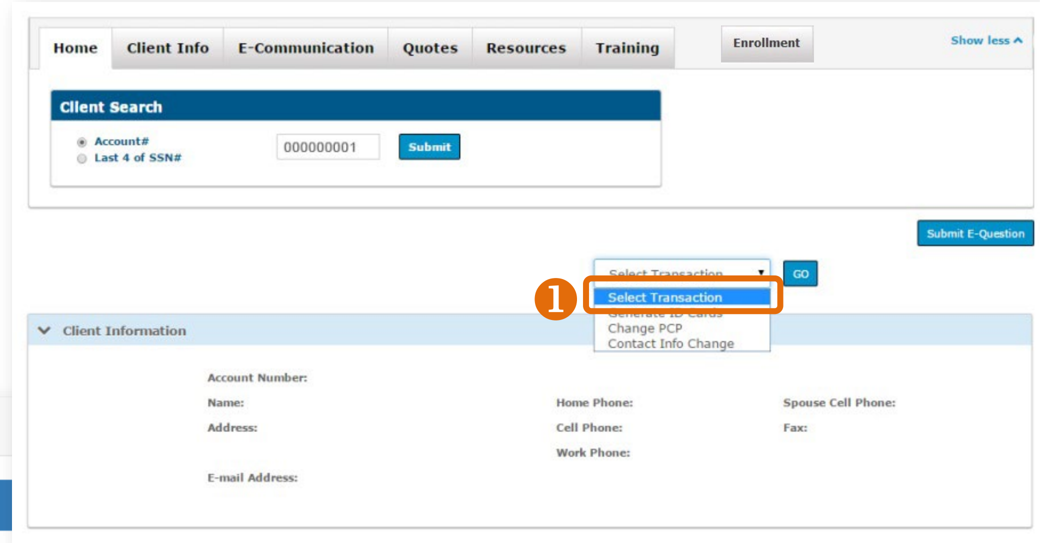
Please file all claims with your LOCAL Blue Cross and Blue Shield plan.

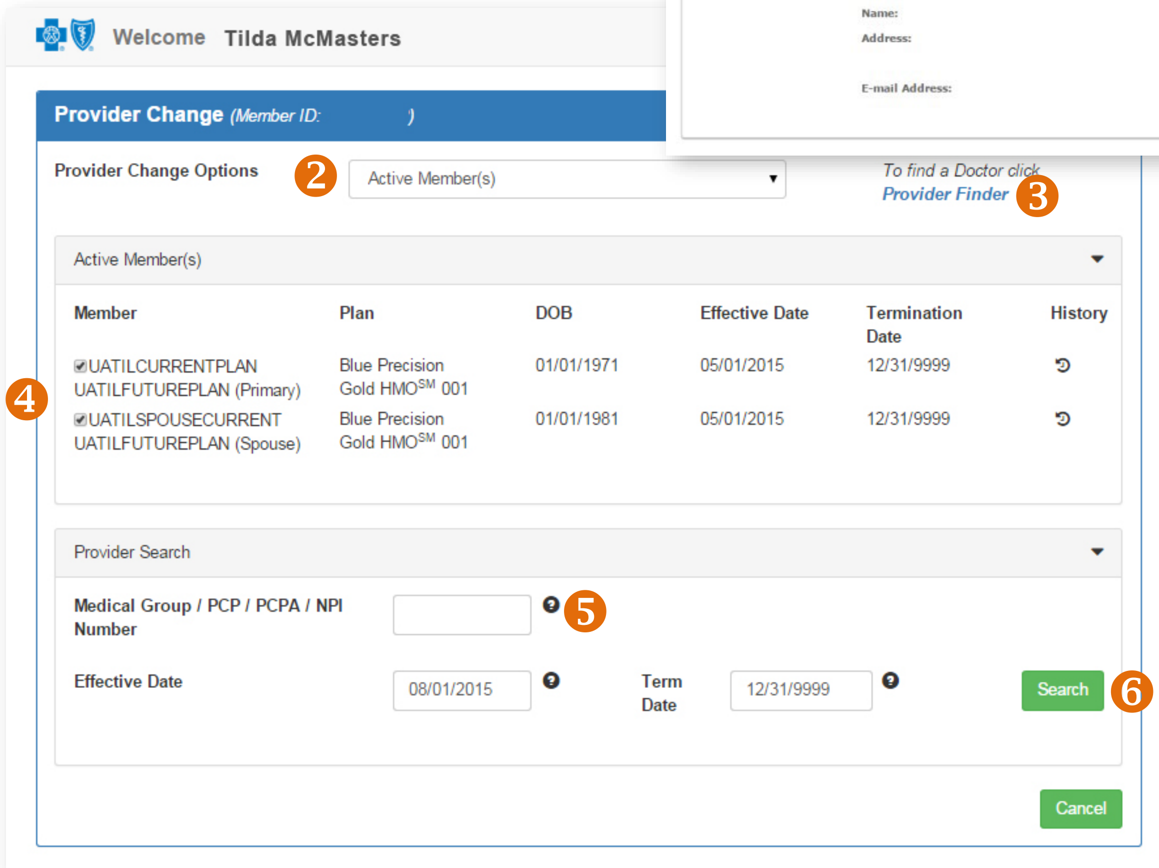


Change Primary Care Physician

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

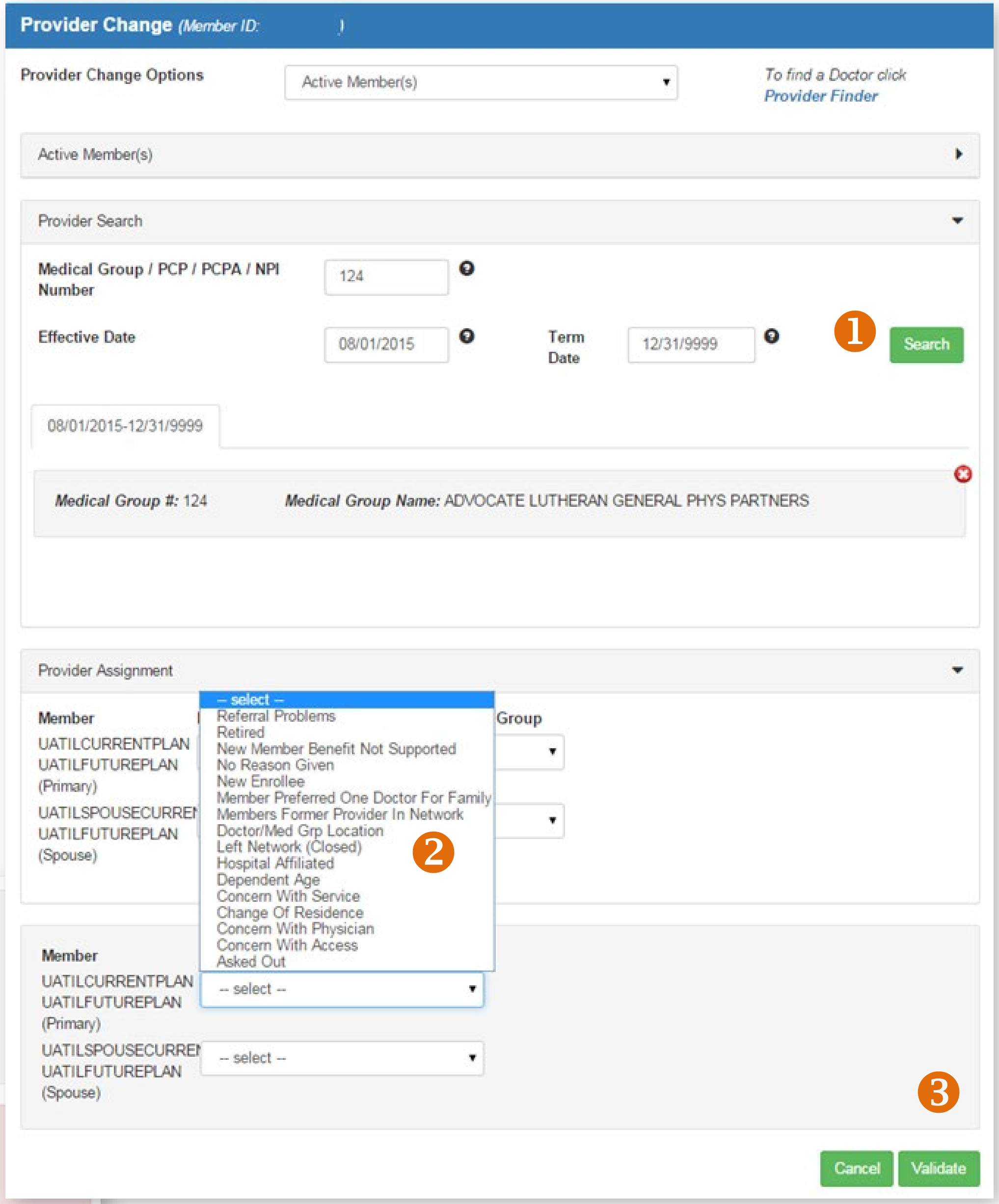
1. After finding a member from completing a simple search from the "Home" tab or an advanced search from the "Client Info" tab, select "Change PCP" from the dropdown menu and click the "GO" button.
2. When the "Provider Change" page opens, select the member name needing the PCP change.
3. Click on the "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.

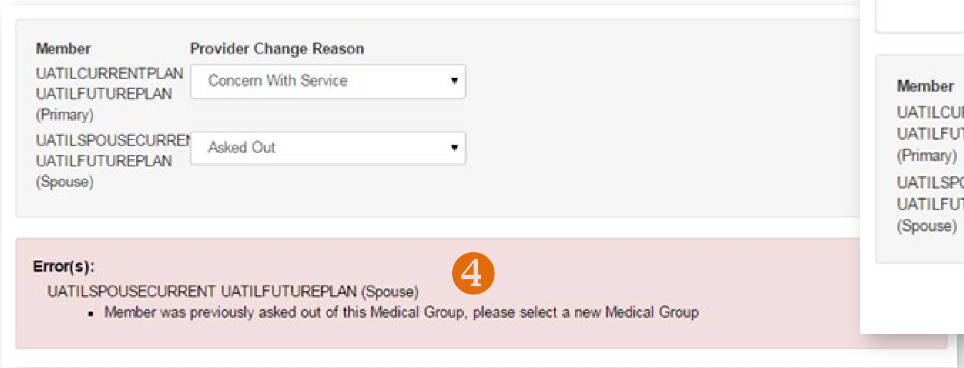




Change Primary Care Physician (continued)

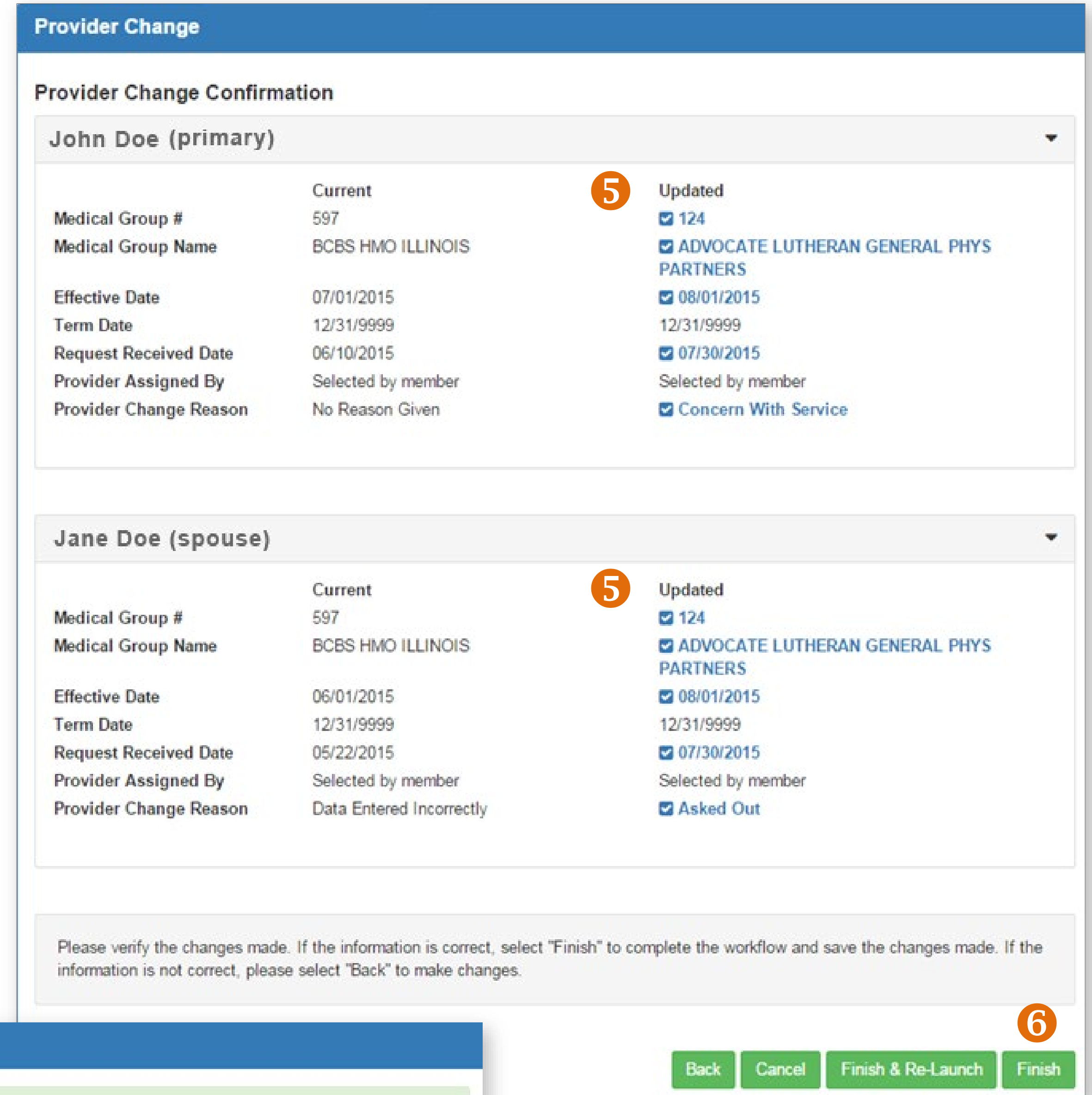
1. After you click the "Search" button, the new PCP information is displayed.
2. Choose a reason for changing provider(s) from the "Provider Change Reason" dropdown list located in the Provider Assignment section.
3. Click the "Validate" button.
4. If the reason selected is not valid, an error message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

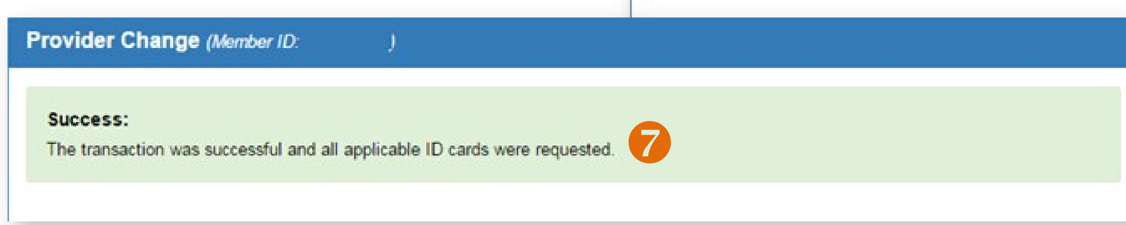




Change Primary Care Physician (continued)

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.





Change Primary Care Physician (continued)

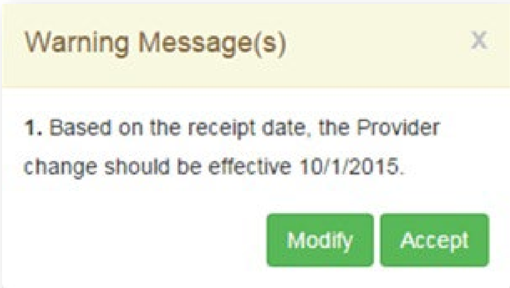
PCP Changes

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.

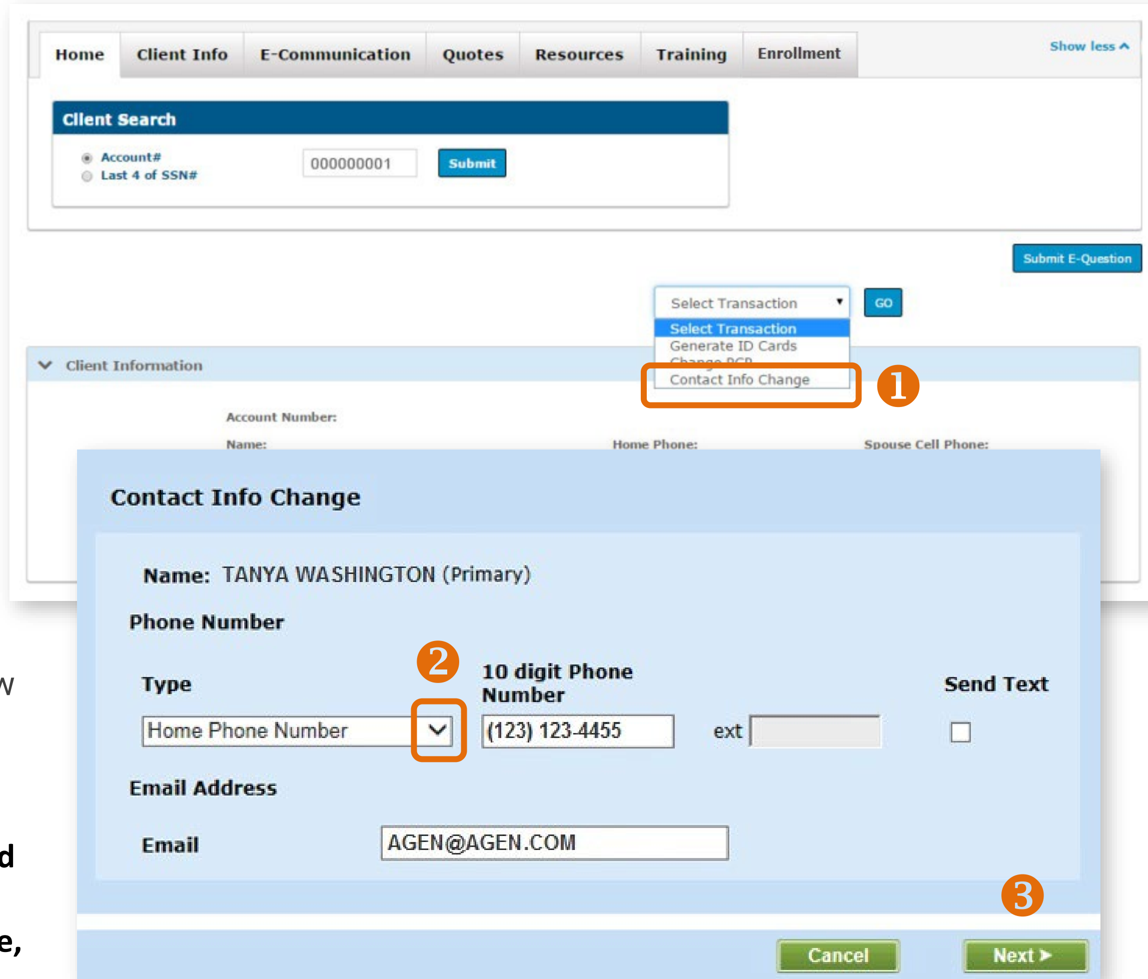
Effective Dates for PCPs

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.