blue california

New Broker Appointment

2023

Begin

For Agent Use Only. Distributions to consumers, other insurers, or any other person or company is strictly prohibited.

Begin

Introduction

This job aid will walk you through the process of:

- ❑ Registering/Creating an Account & Logging In
- ❑ Starting an Appointment Application
- ❑ Signing & Uploading Documents
- ❑ Reviewing a Submitted Application

For Agent Use Only. Distributions to consumers, other insurers, or any other person or company is strictly prohibited.

Begin

Creating an Account

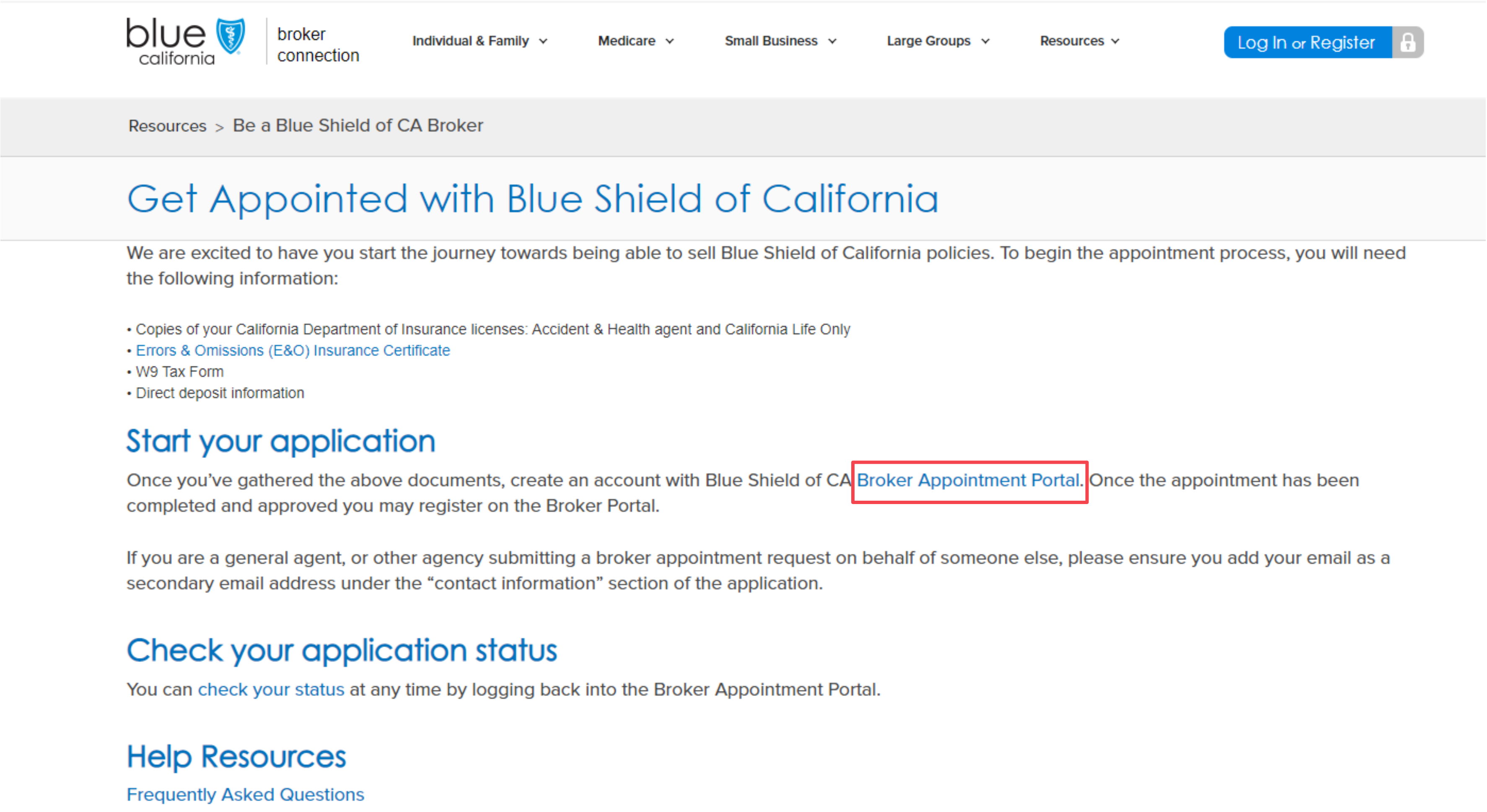
In this section you will learn the process of registering and logging into your account.

For Agent Use Only. Distributions to consumers, other insurers, or any other person or company is strictly prohibited.

Creating an Account

Step 1:

Navigate to blueshieldca.com and click the Brokers link in the upper right-hand corner. Next, click Log in or Register. Then, click Get appointed with Blue Shield. Under the Start your application, click Broker Appointment Portal.

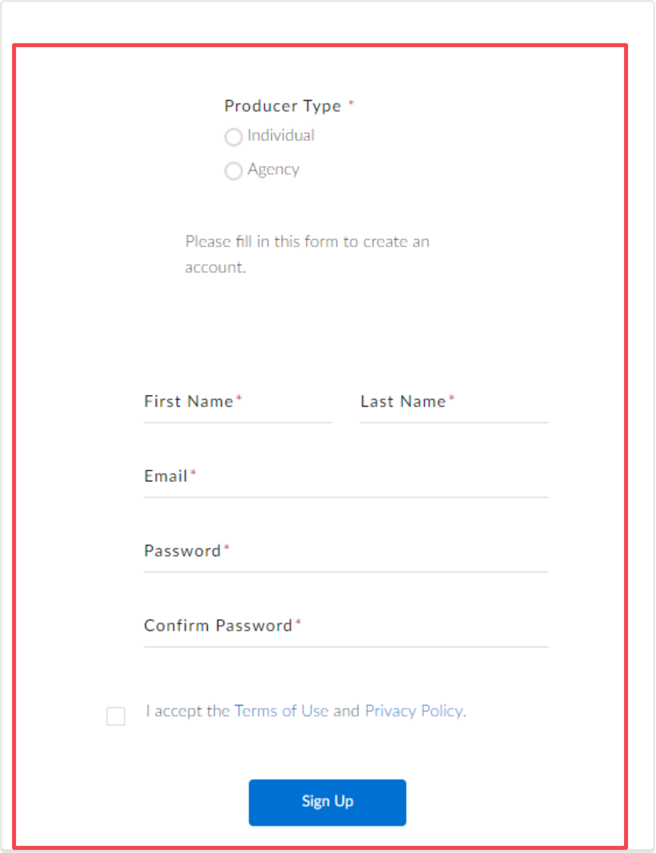


For Agent Use Only. Distributions to consumers, other insurers, or any other person or company is strictly prohibited.

Creating an Account

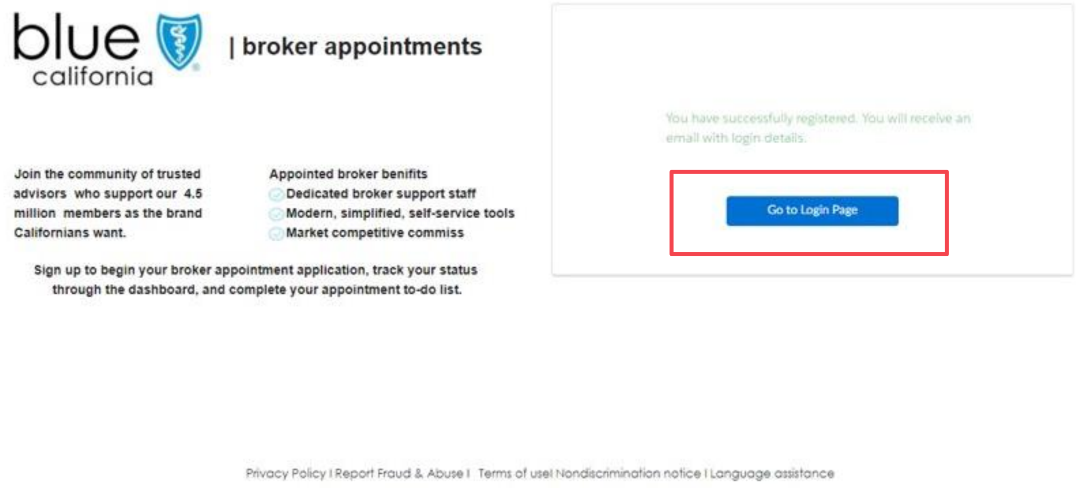
Step 2:

✓Complete the *required fields* in the broker form.
✓Click the box to accept the *Terms of Use and Privacy Policy*
✓Click *Sign Up*



Step 3:

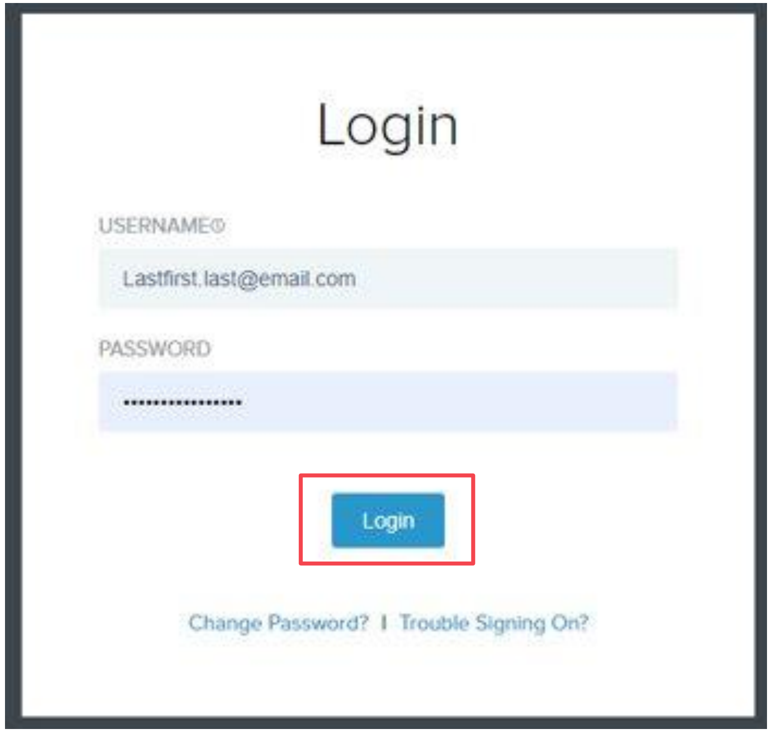
Click the *Go to Login Page* button



Logging In

Step 4:

Enter your *username and password* from the email you received when setting up your account and click *Login*.



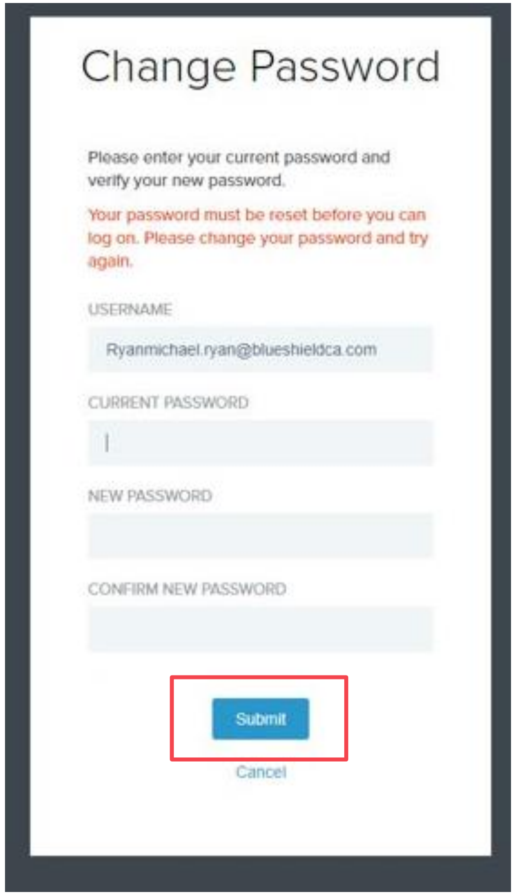
NOTE: The username format is the last name and email address used during registration. *Example: smithjohnsmith@email.com*

Step 5:

You are required to change your password.
Enter your:

- ✓ Username
- ✓ Current Password
- ✓ New Password
- ✓ New Password again

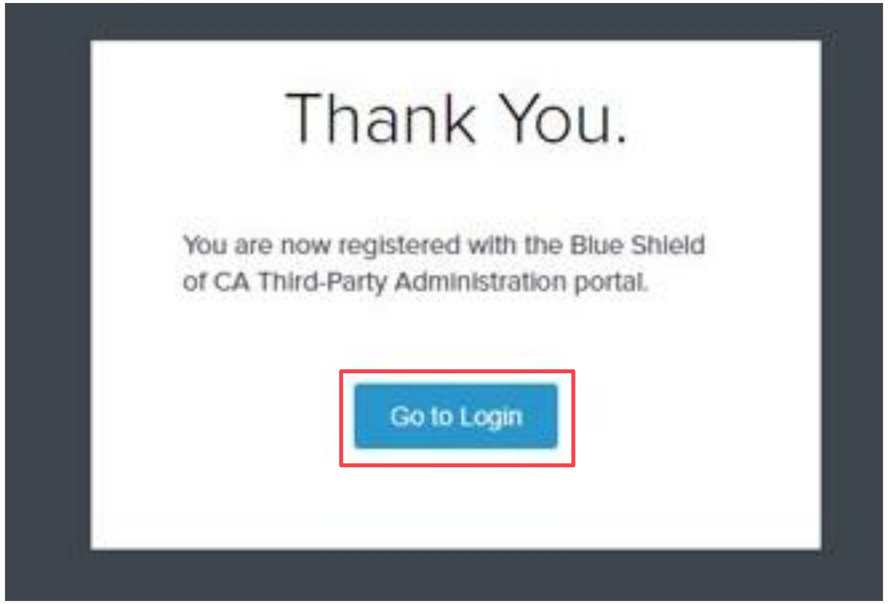
Click *Submit*



Logging In

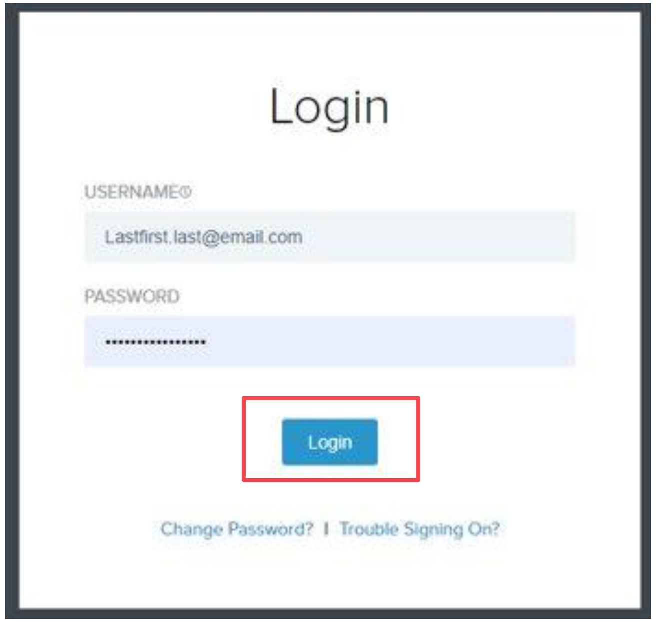
Step 6:

You have successfully been registered! Click the *Go to Login* button



Step 7:

Enter the username and new password combination just established and click the *Login* button.



Begin

Start My Application

This section will walk you through completing a broker appointment application.

For Agent Use Only. Distributions to consumers, other insurers, or any other person or company is strictly prohibited.

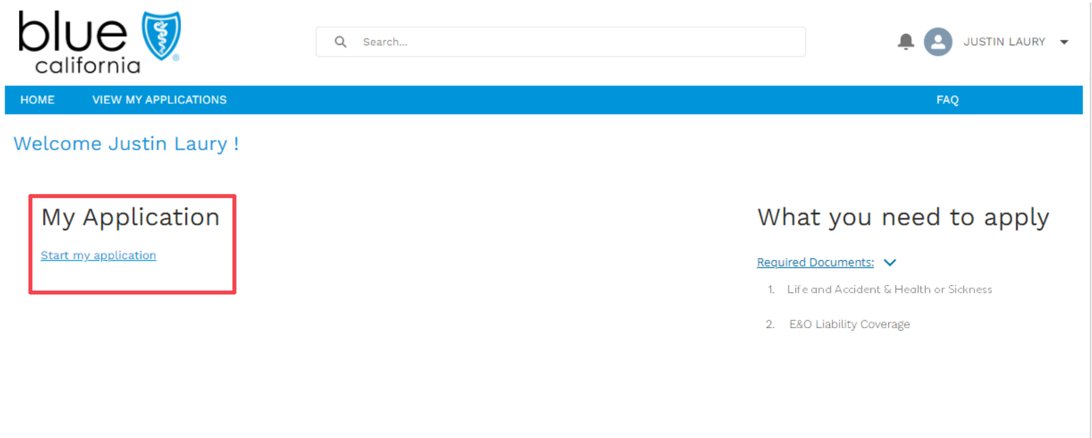
Start My Application

Step 8:

Once logged in, you will be taken to the landing page. Click *Required Documents* to view the document needed to complete your application.

Step 9:

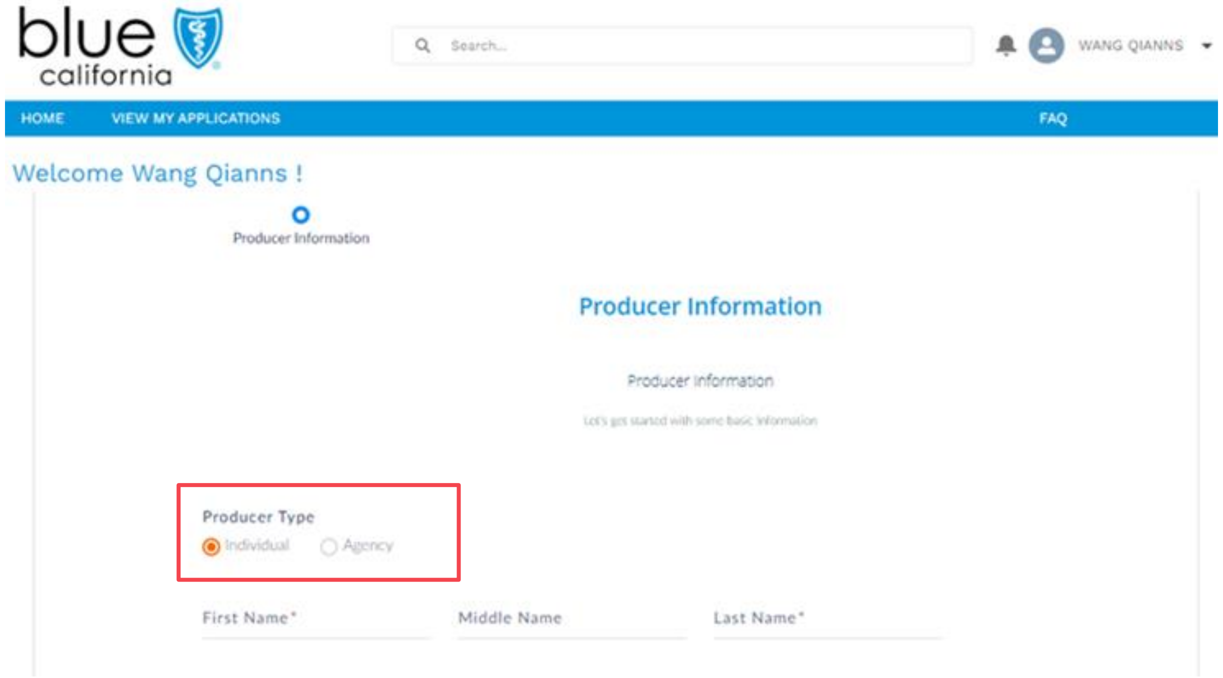
Review and gather the necessary documents and click *Start my application*.



Producer Information

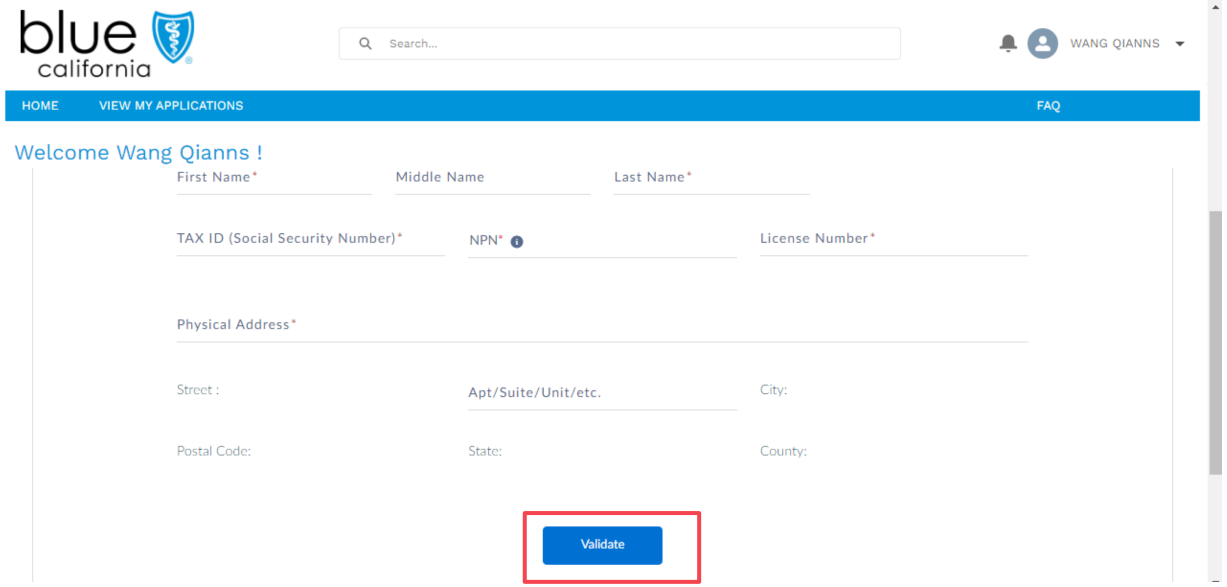
Step 10:

Complete all required fields in the *Producer Information* section.



Step 11:

Click the *Validate button*.



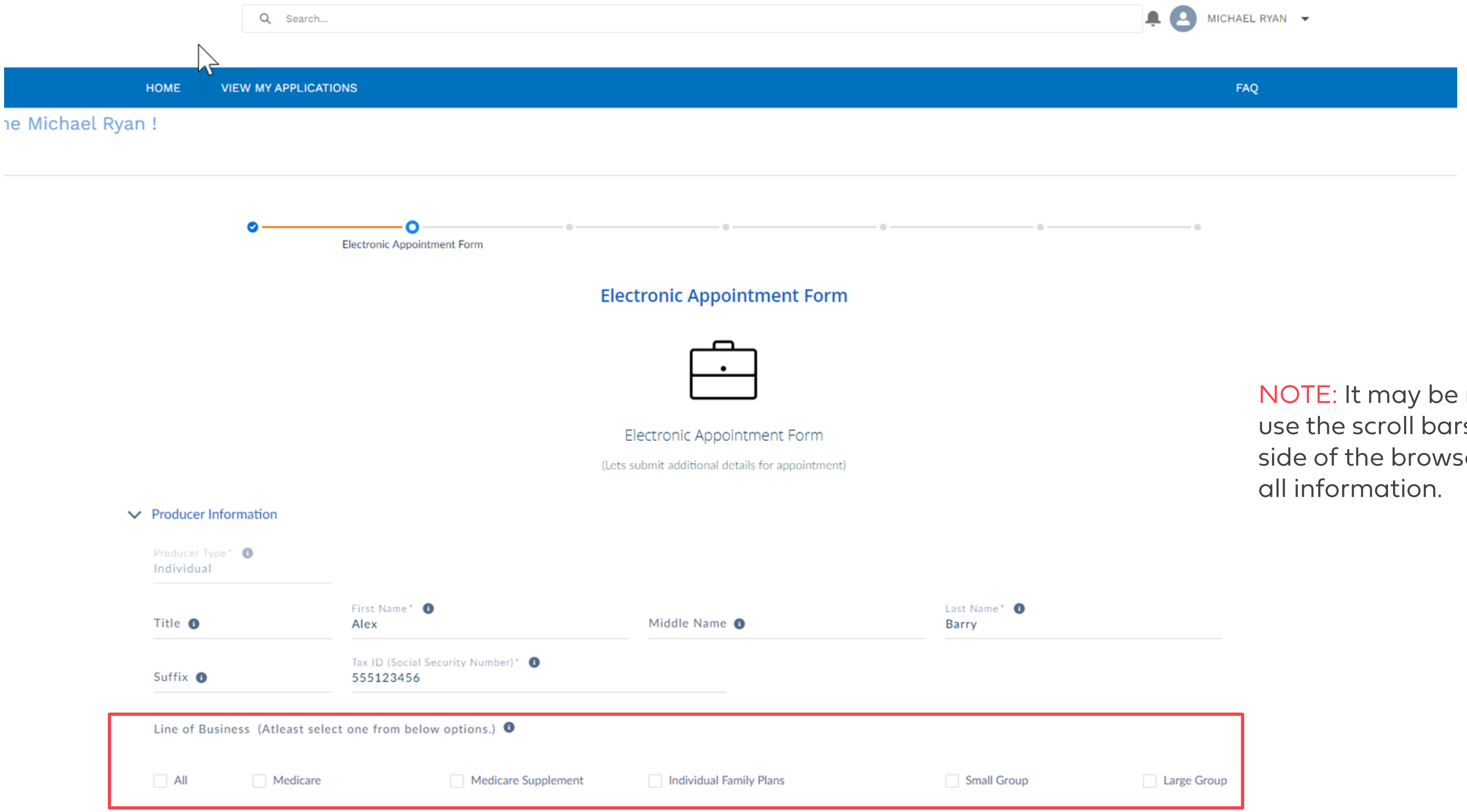
NOTE: When manually adding address, the State field is a dropdown with all 50 states listed along with DC.

For Agent Use Only. Distributions to consumers, other insurers, or any other person or company is strictly prohibited.

Electronic Appointment Form

Step 12:

Complete all required fields on the *Electronic Appointment form* and select one or more from the *Line of Business* options.



NOTE: It may be necessary to use the scroll bars on the right side of the browser to complete all information.

For Agent Use Only. Distributions to consumers, other insurers, or any other person or company is strictly prohibited.

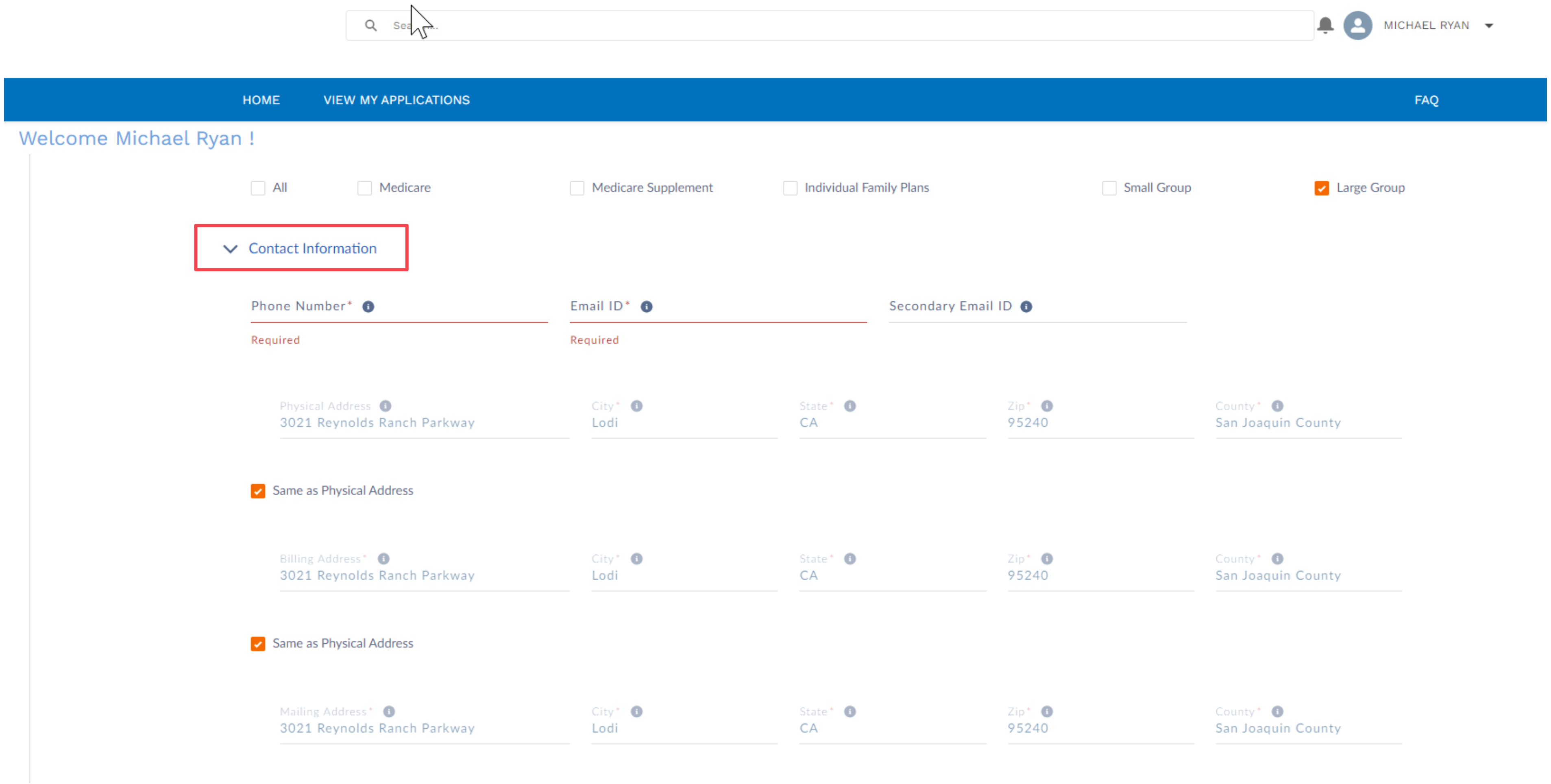
Contact Information

Step 13:

Complete all required fields on the *Contact Information section*

NOTE:

- Secondary email address is copied to any email notifications sent to the primary email address.
- If the billing and mailing addresses are the same, click the box and addresses will copy from Physical address. If different, enter each address separately.

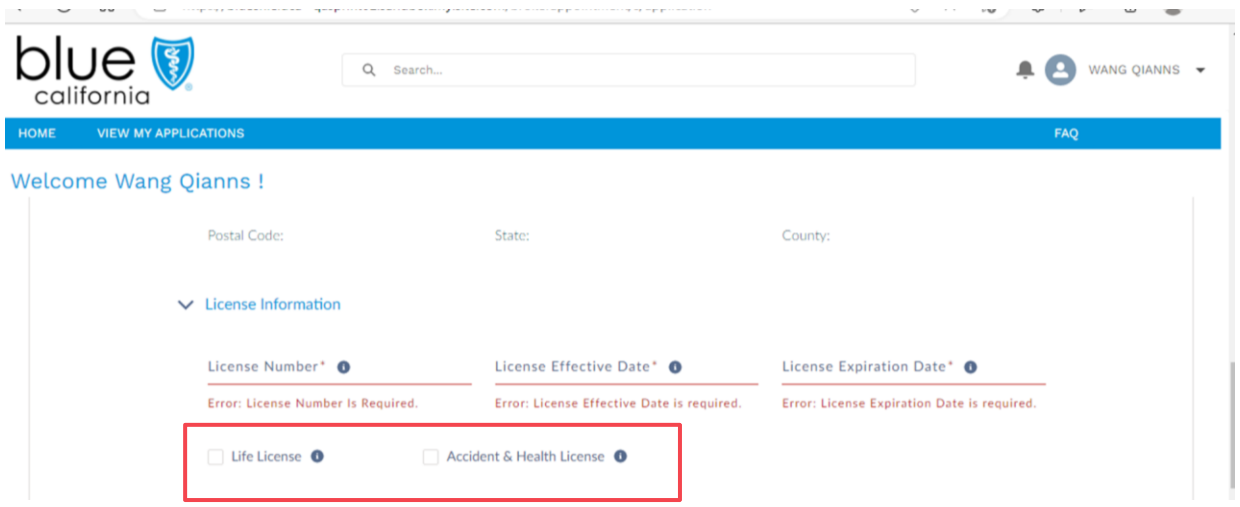


For Agent Use Only. Distributions to consumers, other insurers, or any other person or company is strictly prohibited.

License, Banking, and E&O Information

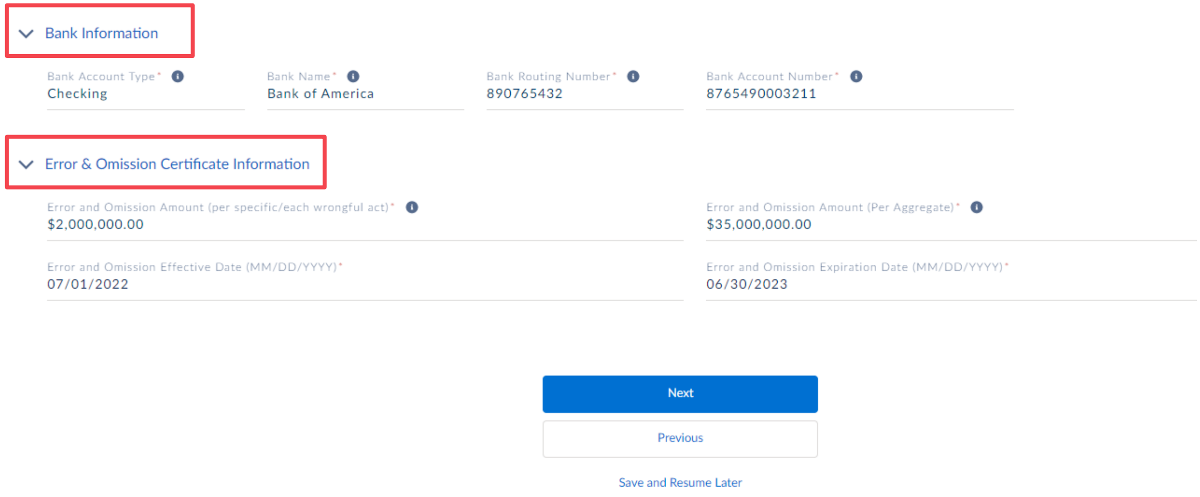
Step 14:

Complete all required fields in the *License Information* section.



Step 15:

Enter *Banking information* , add coverage amounts, and dates of coverage for *Error & Omissions Declaration page*.

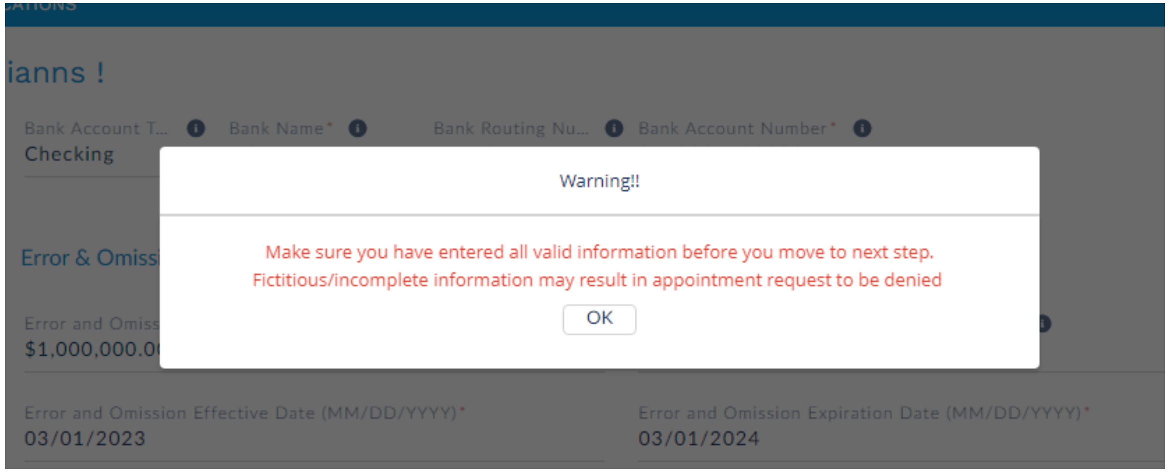


For Agent Use Only. Distributions to consumers, other insurers, or any other person or company is strictly prohibited.

License Information

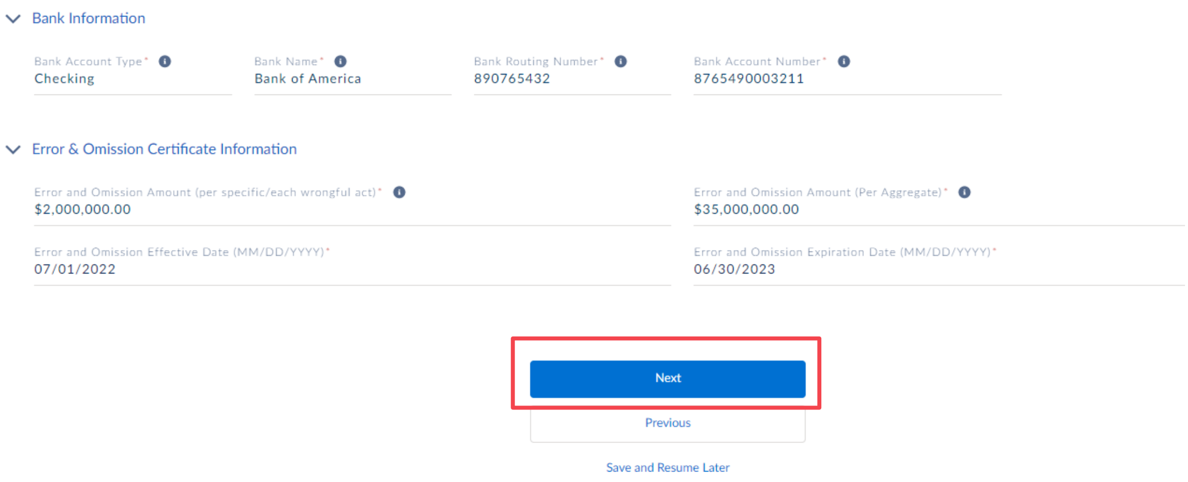
RESULT:

A warning message pops up once the data in all fields has been entered. Please take the time to review your entries to ensure all data is correct. Make any necessary corrections, if needed, then Click OK.



Step 16:

Click the *Next* button.



Signing Documents

This section will walk you through the process of electronically signing required forms.

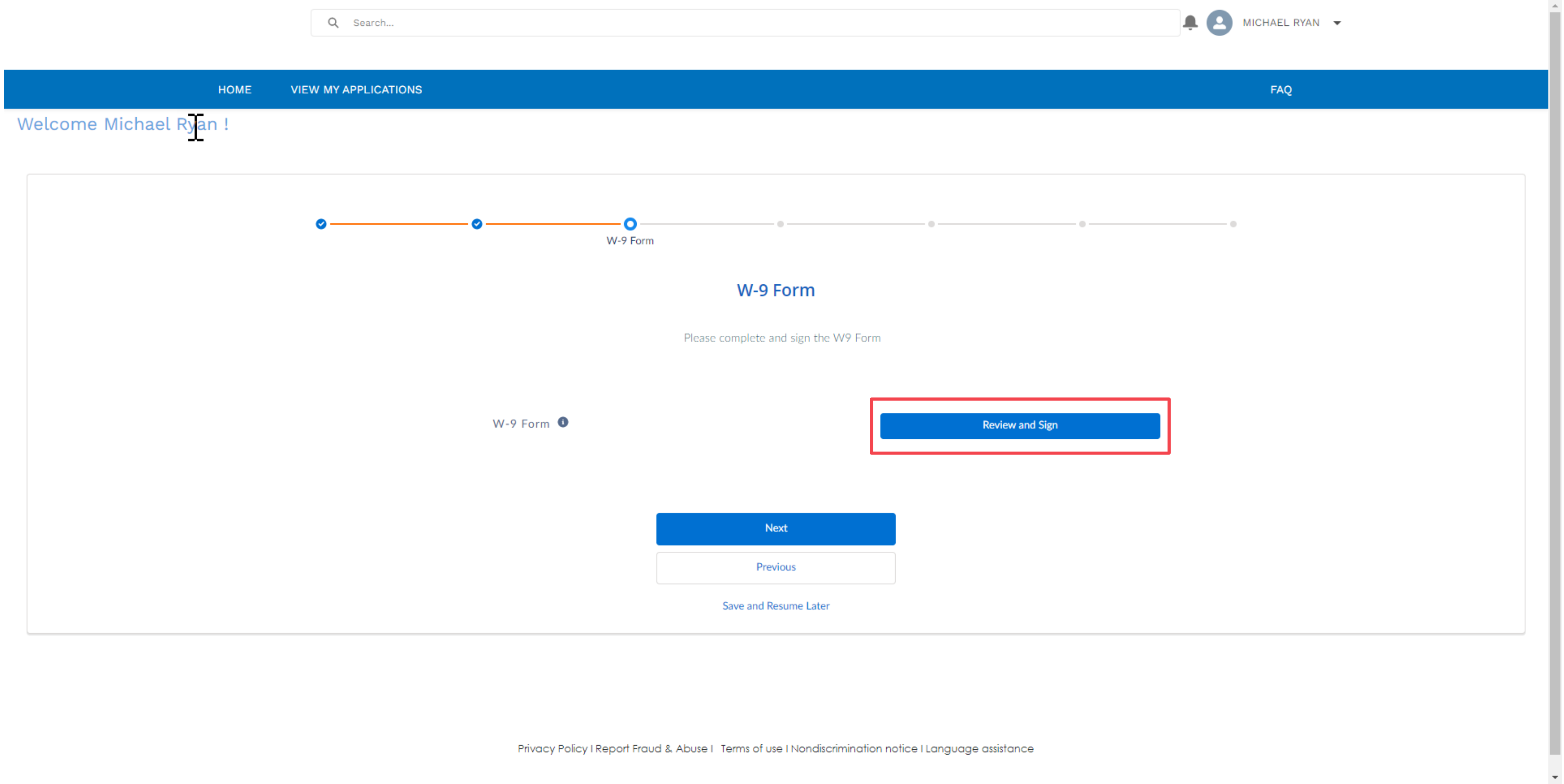
Begin

For Agent Use Only. Distributions to consumers, other insurers, or any other person or company is strictly prohibited.

W-9 Form

Step 17:

Click the *Review and Sign* button.



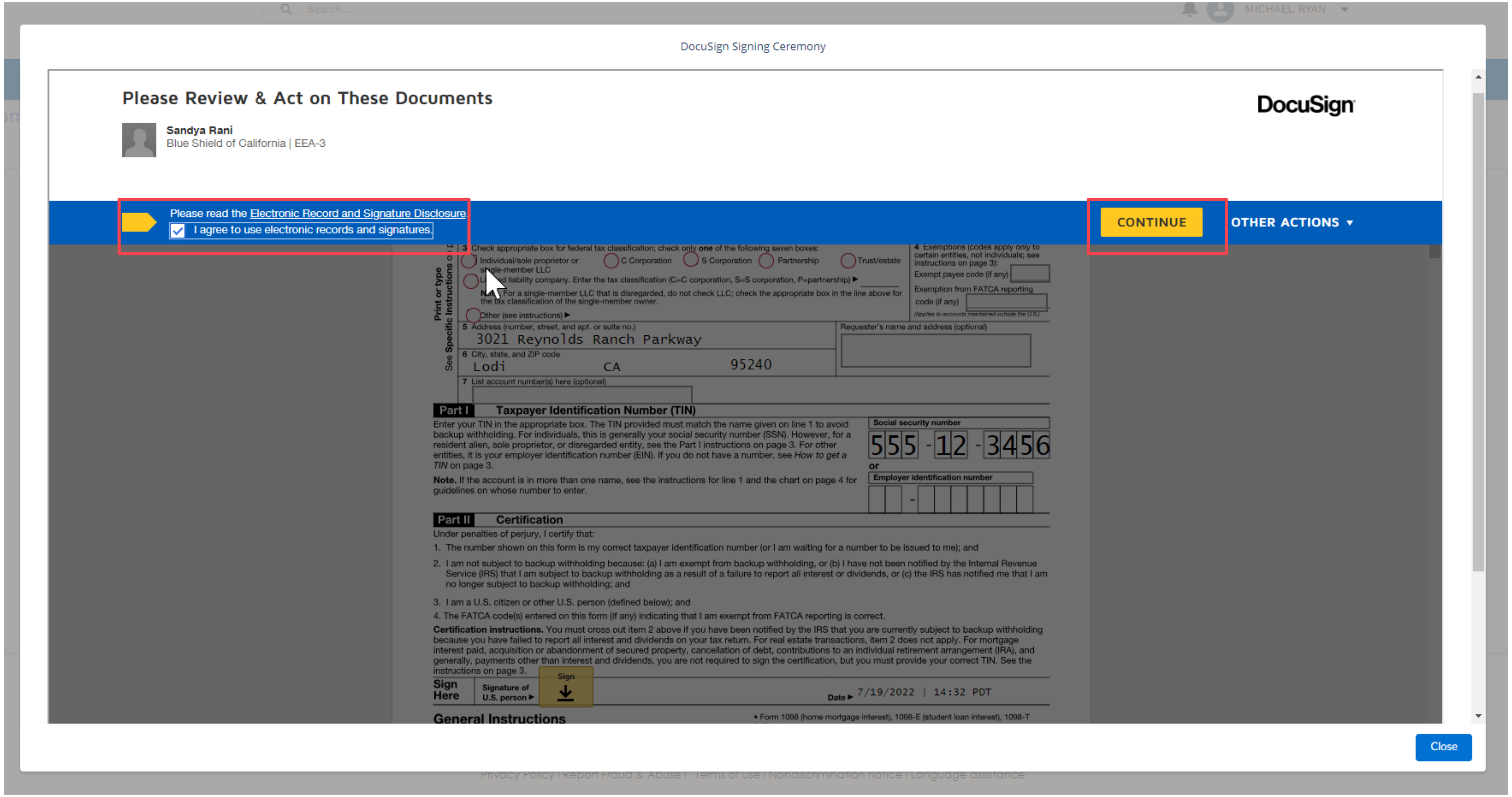
NOTE:
Clicking the Review and Sign button will automatically launch a DocuSign window to complete the W-9 Form electronically.

For Agent Use Only. Distributions to consumers, other insurers, or any other person or company is strictly prohibited.

W-9 Form

Step 18:

Check the box agreeing to use the e-signature screen and click the Continue button.

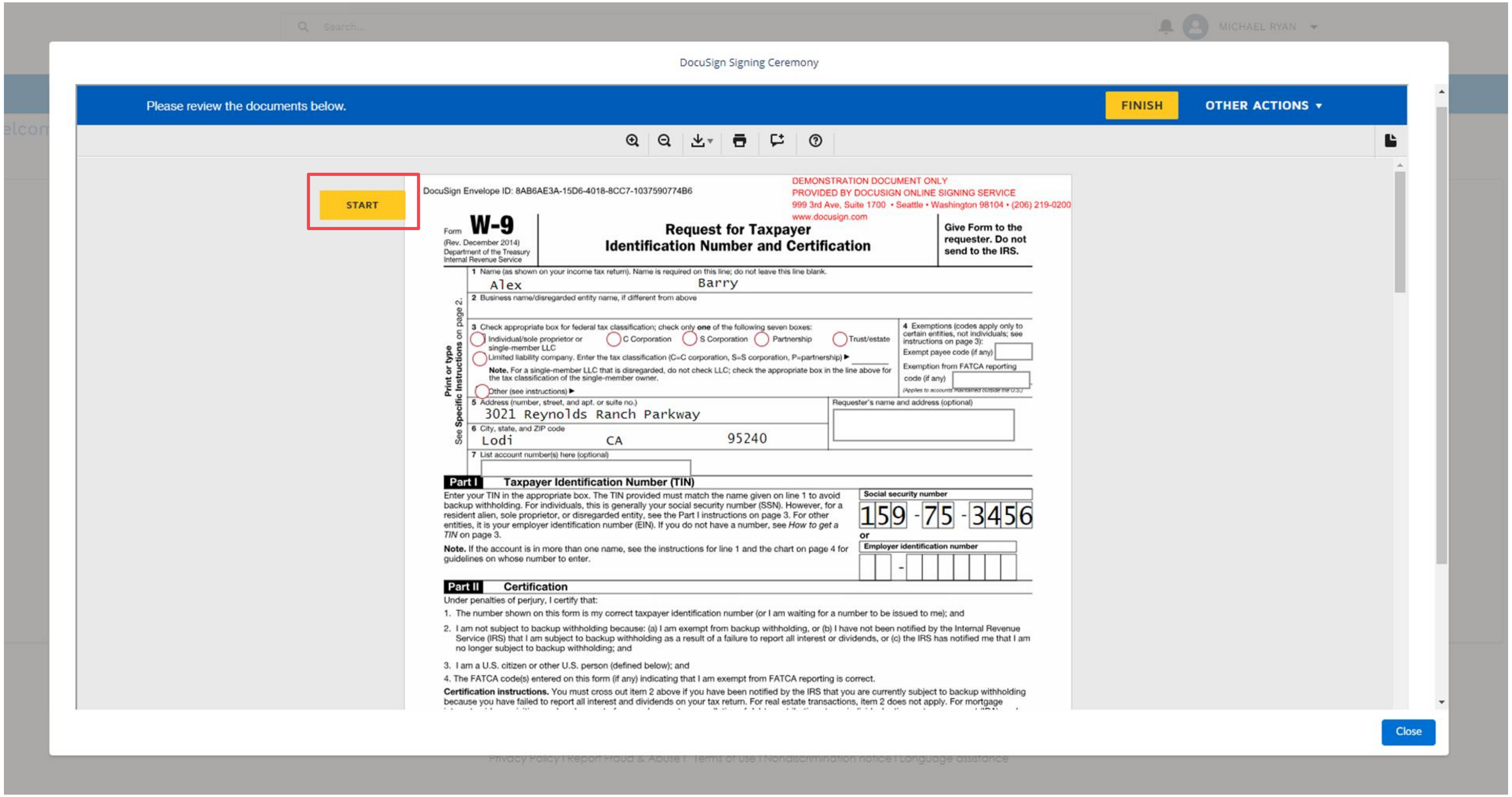


For Agent Use Only. Distributions to consumers, other insurers, or any other person or company is strictly prohibited.

W-9 Form

Step 19:

Click *Start* button and complete W-9 form.

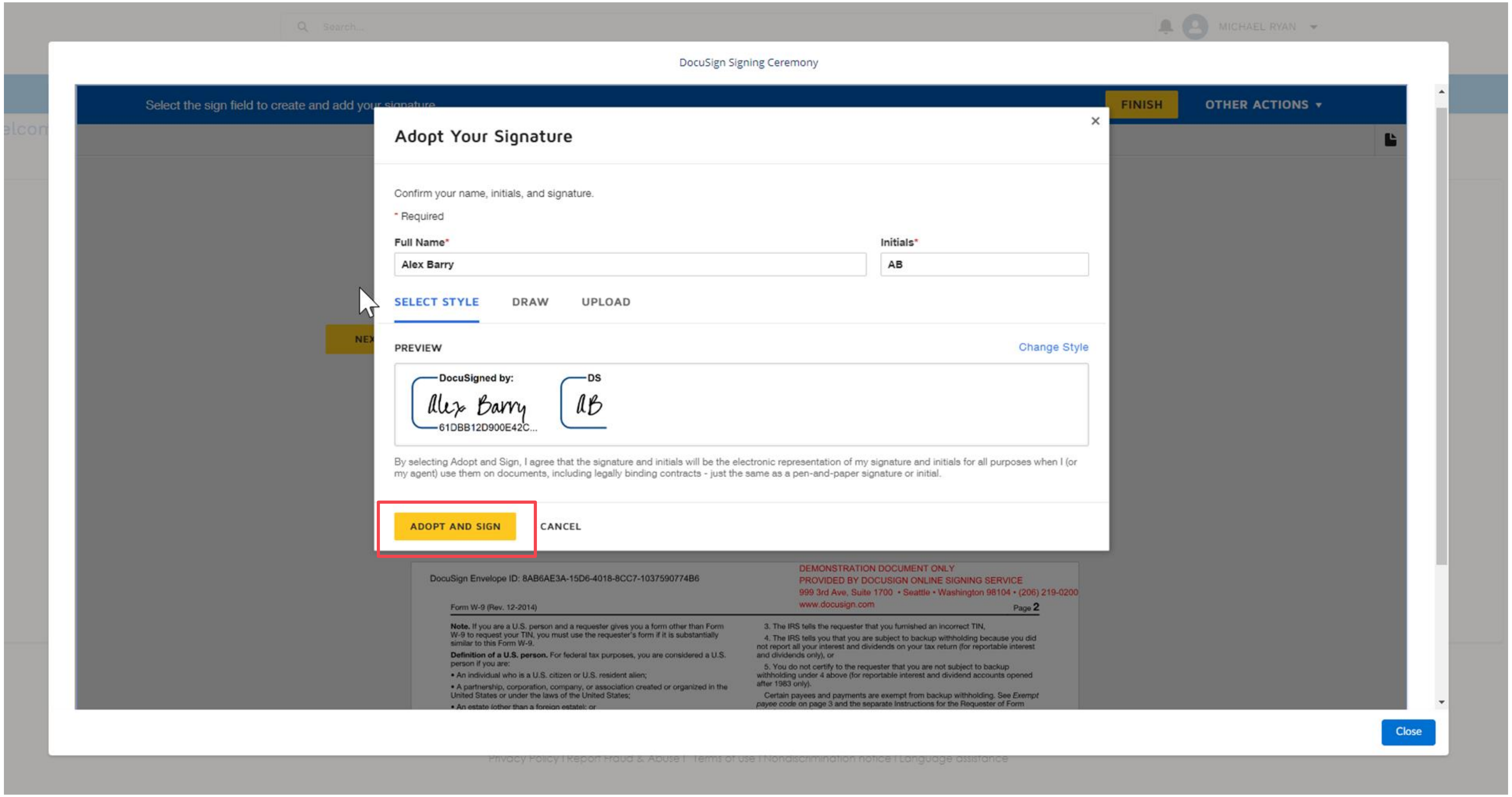


For Agent Use Only. Distributions to consumers, other insurers, or any other person or company is strictly prohibited.

W-9 Form

Step 20:

If asked, accept e-signature style. Click the *Adopt and Sign* button.

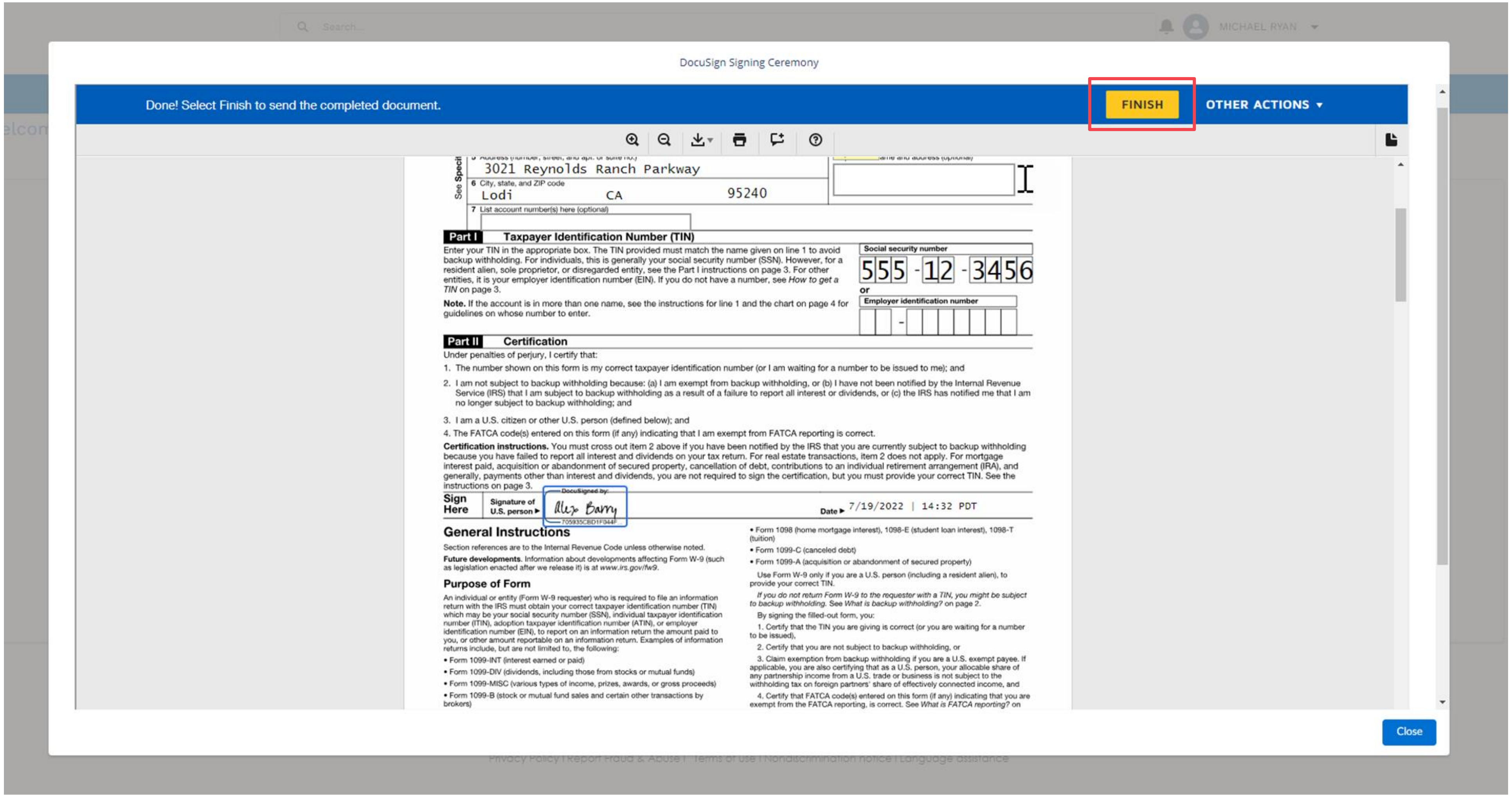


For Agent Use Only. Distributions to consumers, other insurers, or any other person or company is strictly prohibited.

W-9 Form

Step 21:

Once e-signature is applied, click the *Finish* button on the top of the form.

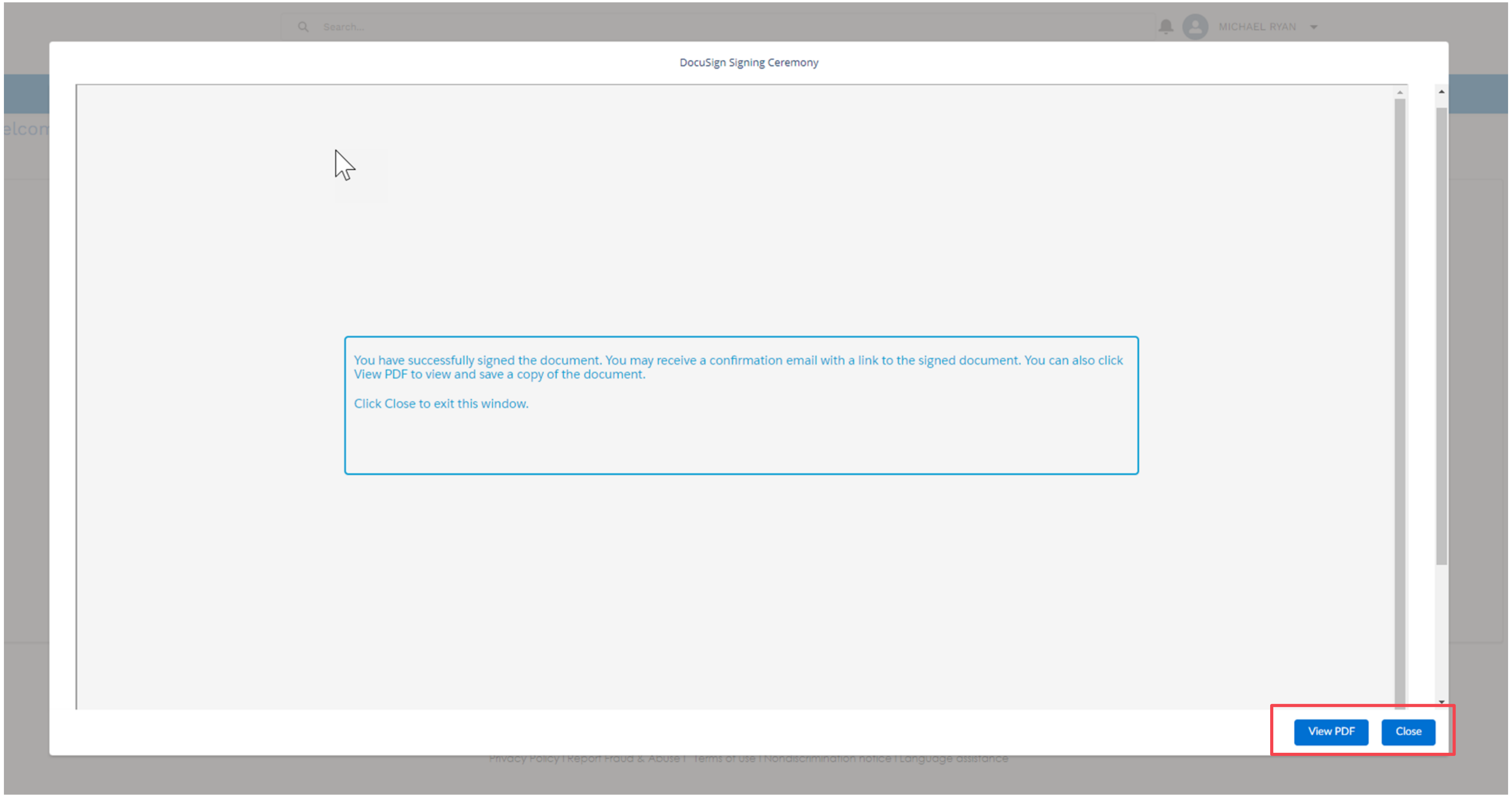


For Agent Use Only. Distributions to consumers, other insurers, or any other person or company is strictly prohibited.

W-9 Form

RESULT:

A confirmation appears when successfully signed. Choose to View the completed W-9 in PDF or click *Close* button.

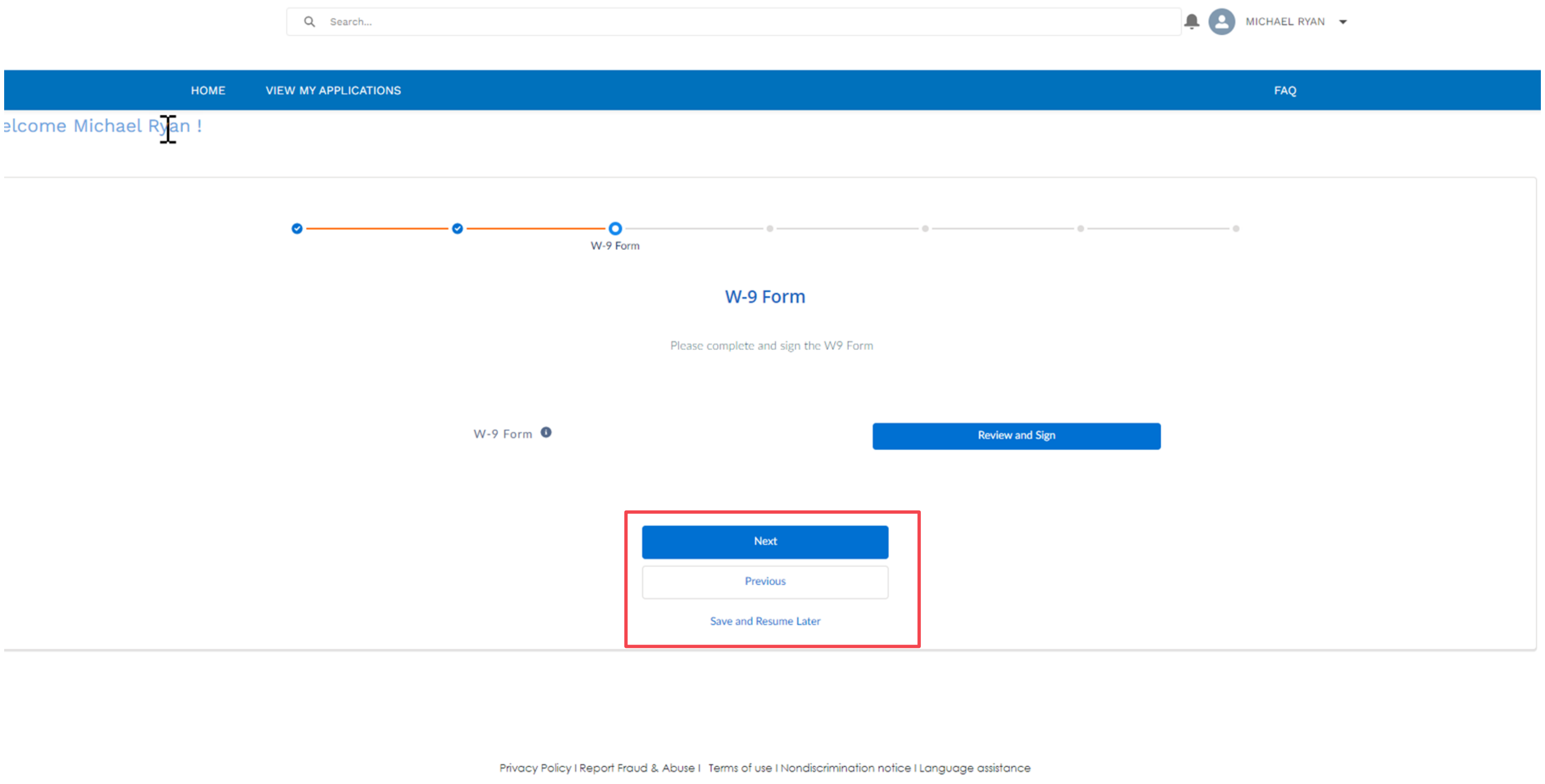


For Agent Use Only. Distributions to consumers, other insurers, or any other person or company is strictly prohibited.

W-9 Form

Step 22:

Click the *Next* button to upload required documents (Health License and E&O Coverage certificate).



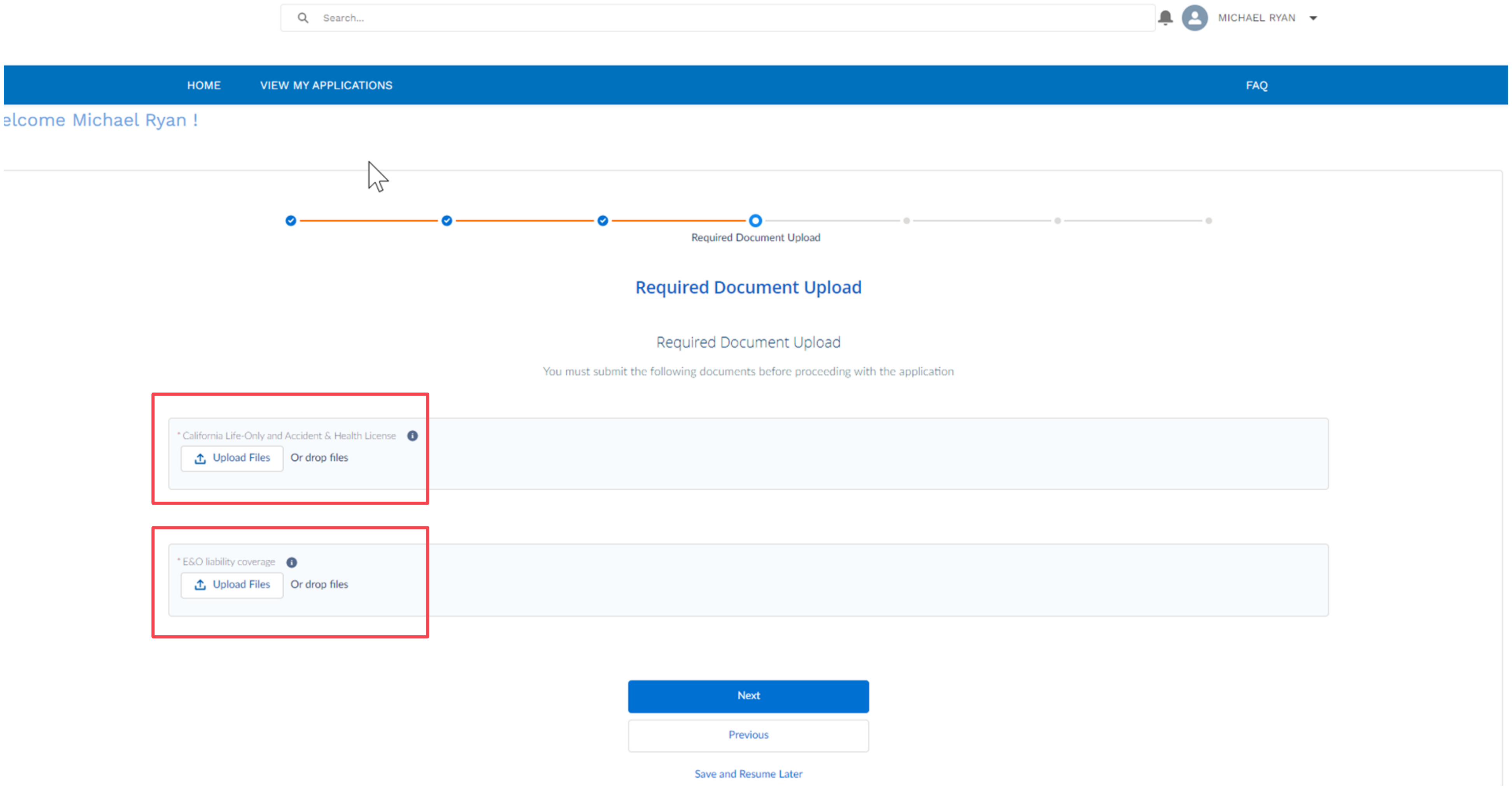
NOTE:
If needed, click *Save and Resume Later* button and progress is saved.

For Agent Use Only. Distributions to consumers, other insurers, or any other person or company is strictly prohibited.

Required Document Upload – License and E&O

Step 23:

Click the *Upload Files* button to browse and locate files to upload.

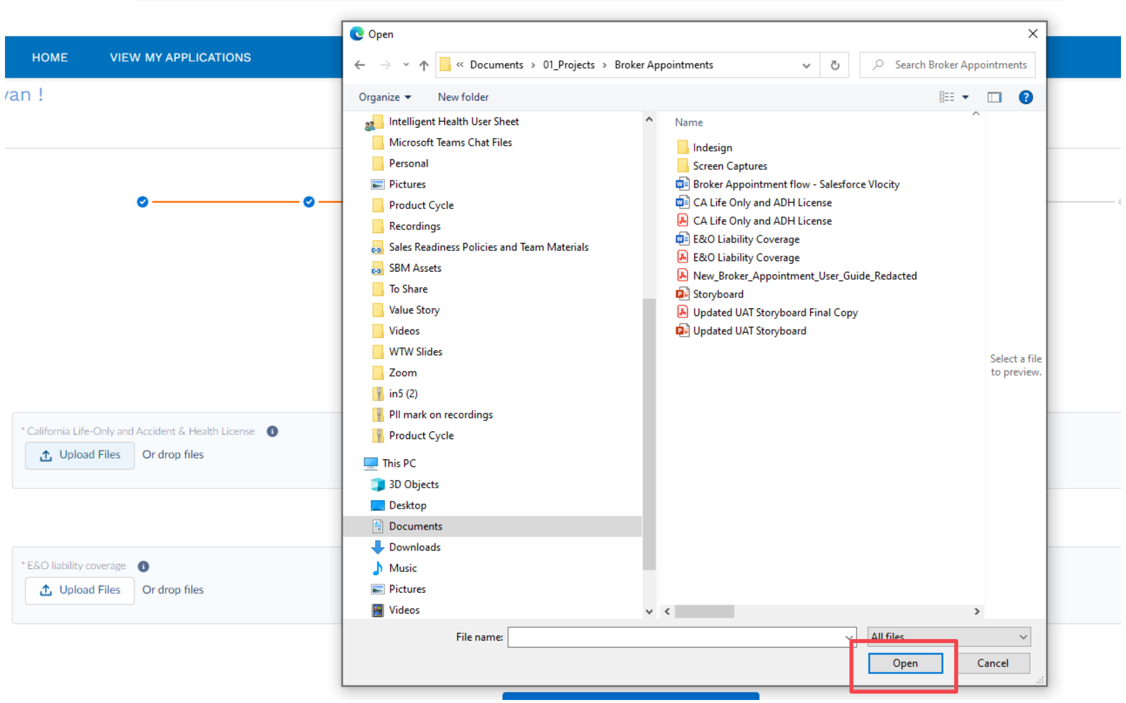


For Agent Use Only. Distributions to consumers, other insurers, or any other person or company is strictly prohibited.

Required Document Upload - License and E&O

Step 24:

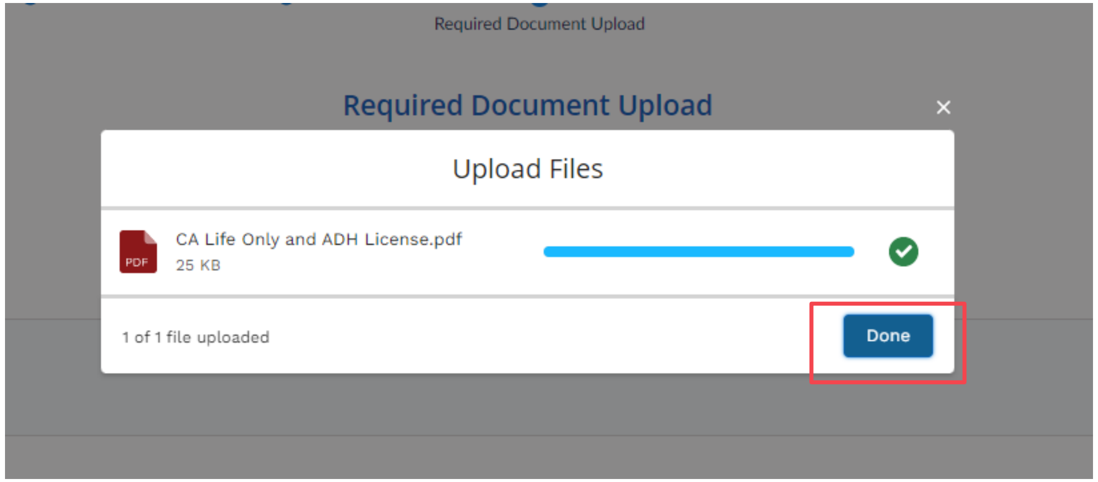
Locate file and click *Open.*



NOTE: Files can also be dragged and dropped onto file loader from computer.

Step 25:

Click the *Done* button.

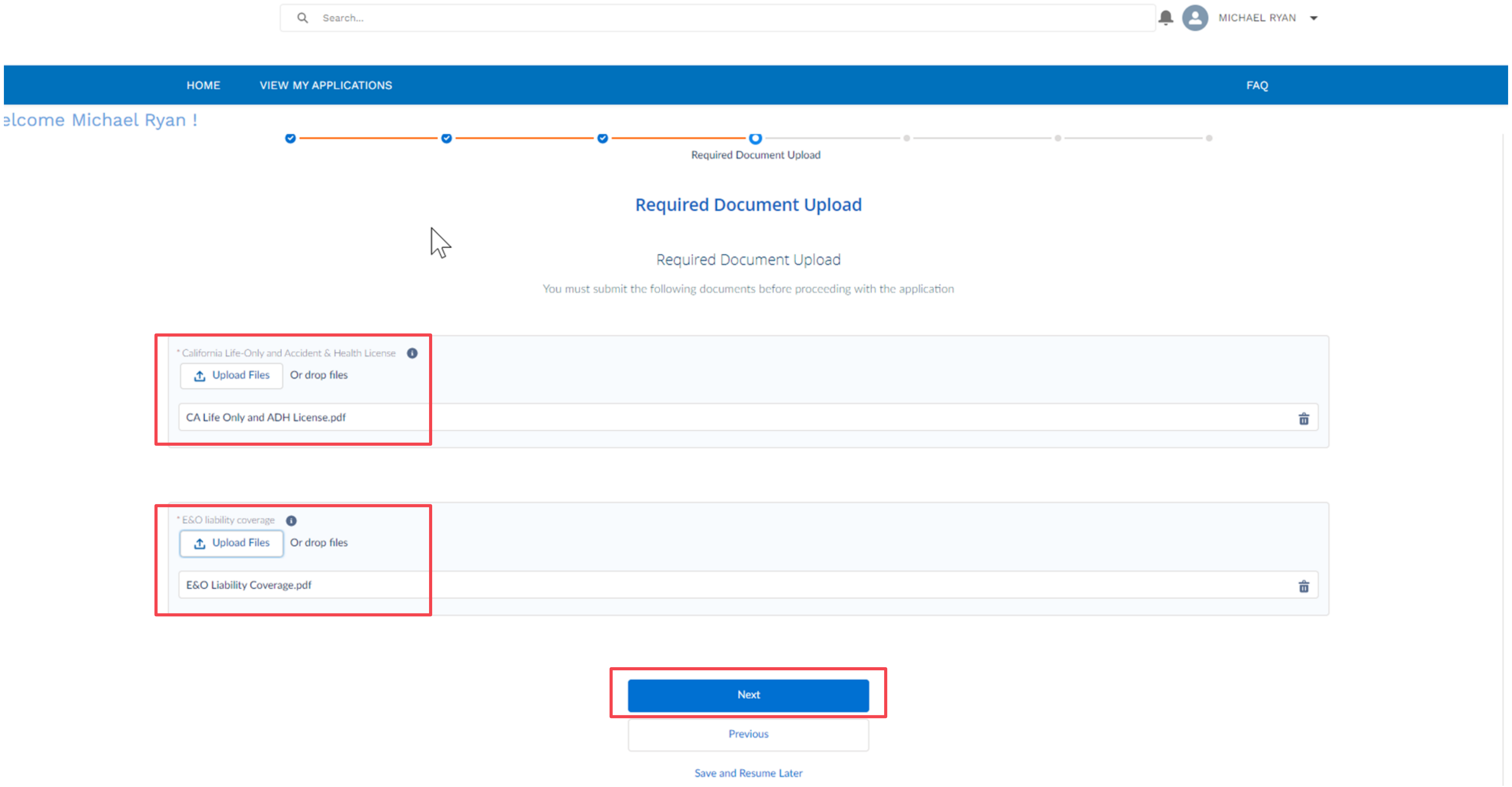


NOTE: Repeat steps 24 -26 to upload the second document.

Required Document Upload - License and E&O

Step 26:

Verify documents are uploaded and click the *Next* button.

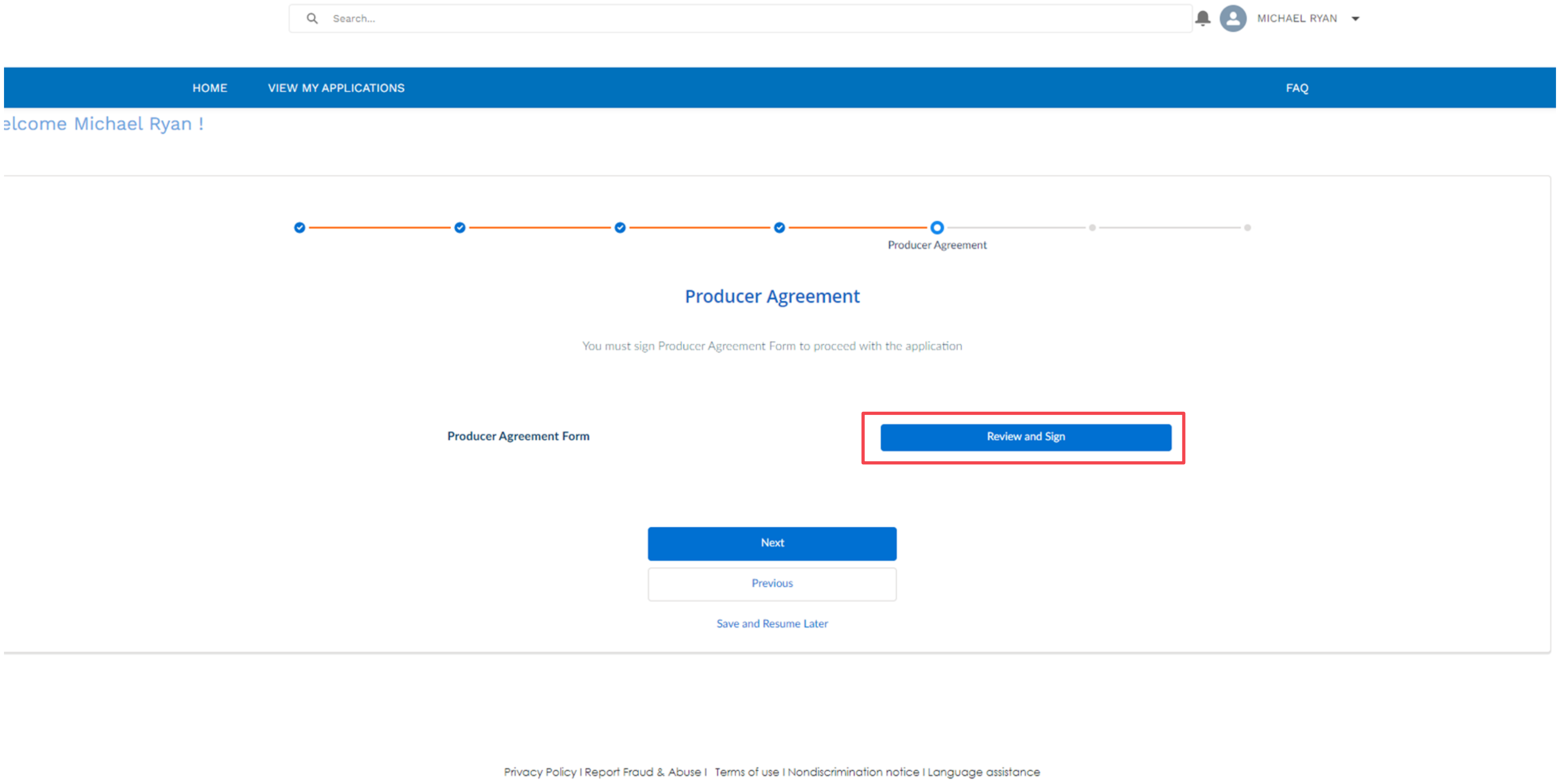


For Agent Use Only. Distributions to consumers, other insurers, or any other person or company is strictly prohibited.

Producer Agreement

Step 27:

Next, e-sign the Producer Agreement. Click the *Review and Sign* button to begin.

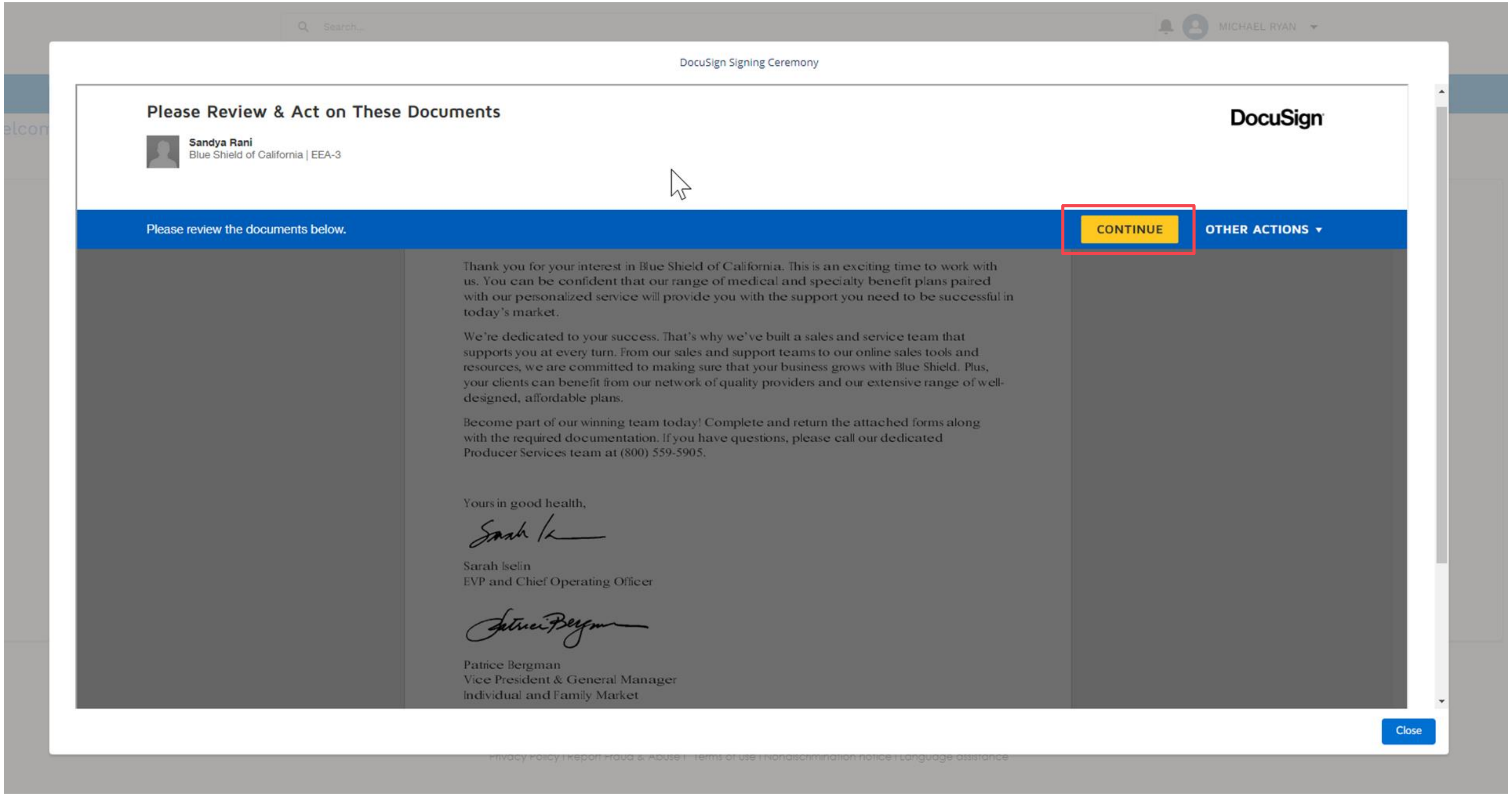


For Agent Use Only. Distributions to consumers, other insurers, or any other person or company is strictly prohibited.

Producer Agreement

Step 28:

To get started, click the *Continue* button.

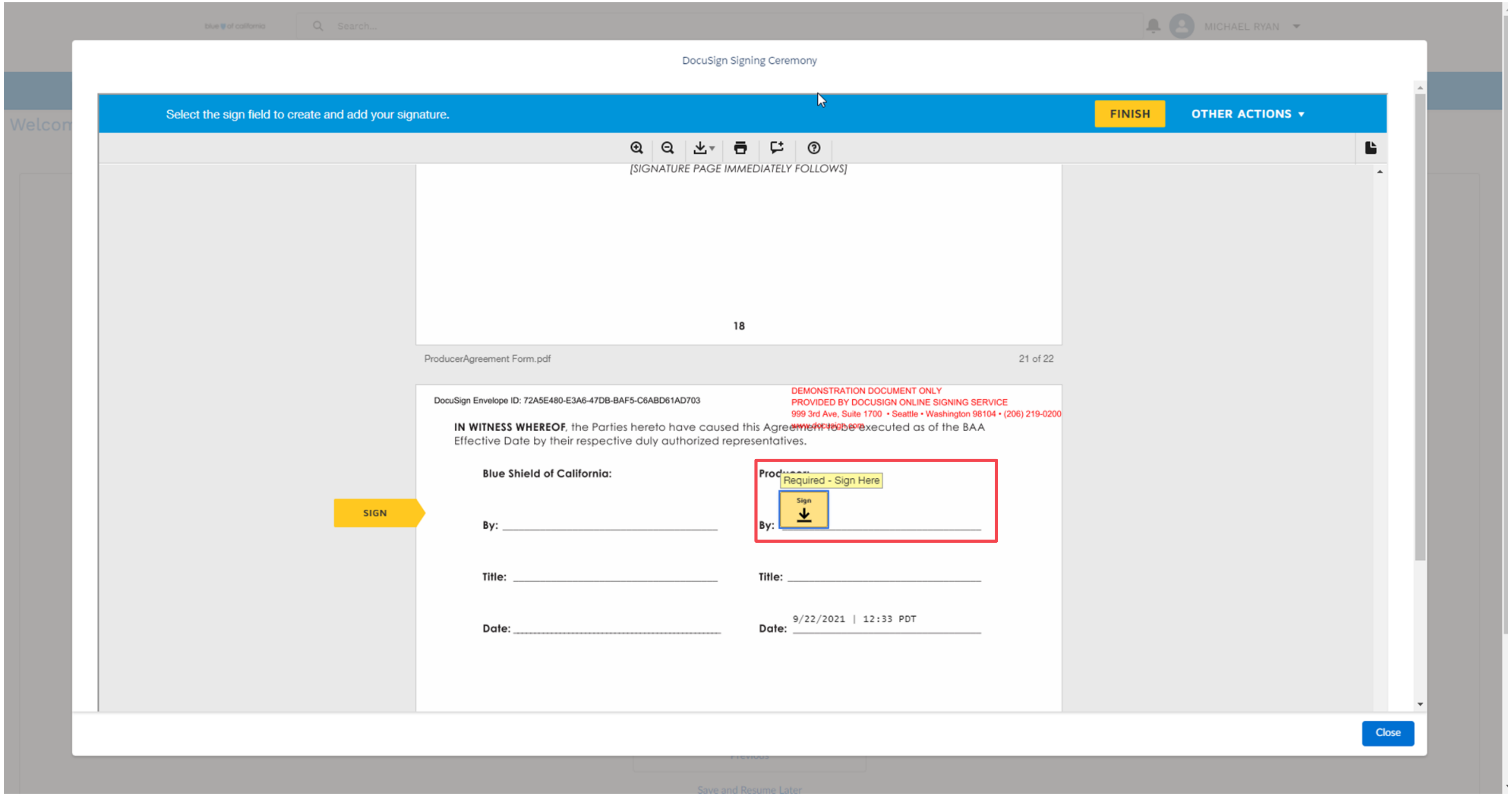


For Agent Use Only. Distributions to consumers, other insurers, or any other person or company is strictly prohibited.

Producer Agreement

Step 29:

Click the *Sign* button to apply e-signature.

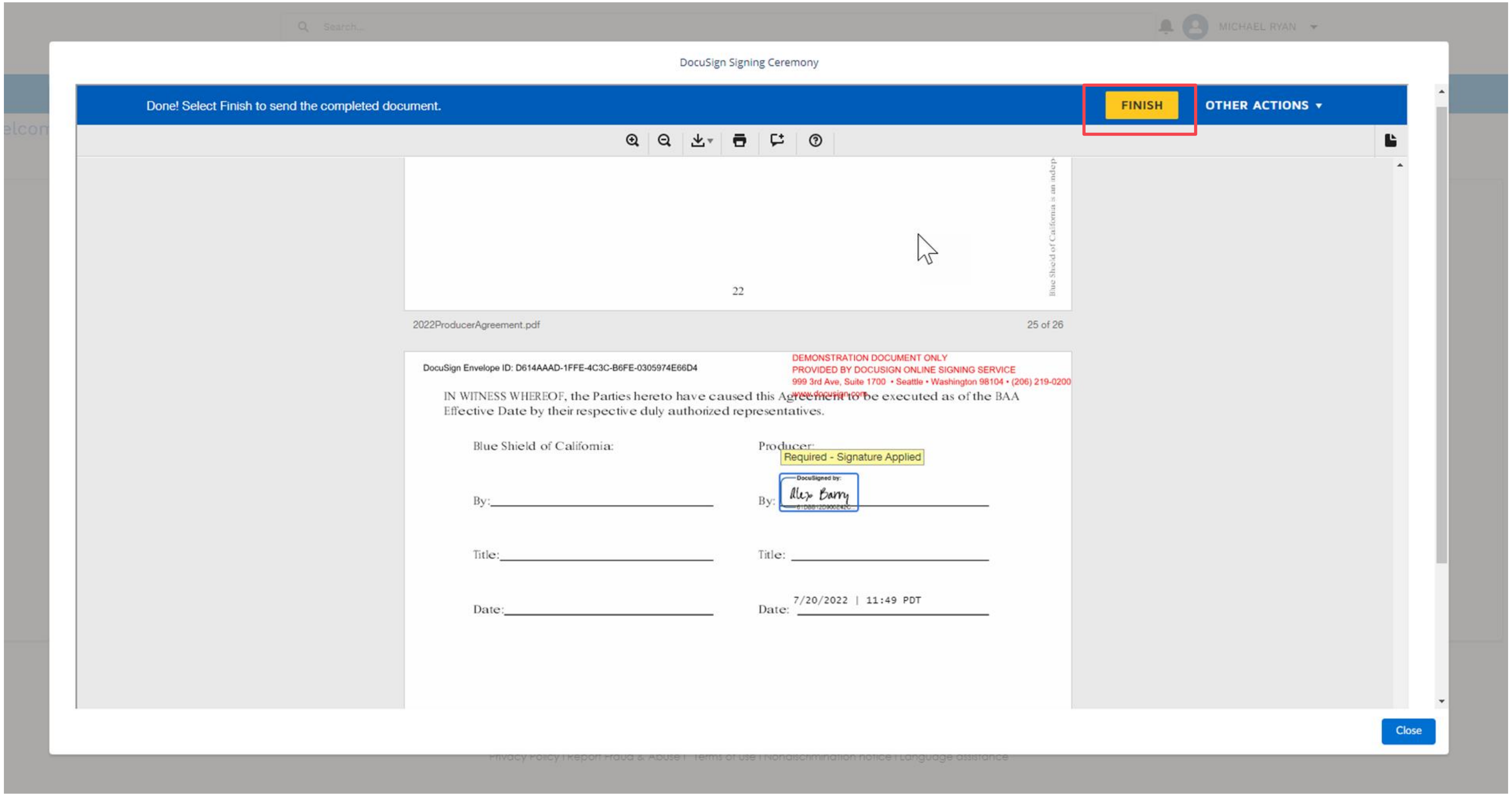


For Agent Use Only. Distributions to consumers, other insurers, or any other person or company is strictly prohibited.

Producer Agreement

Step 30:

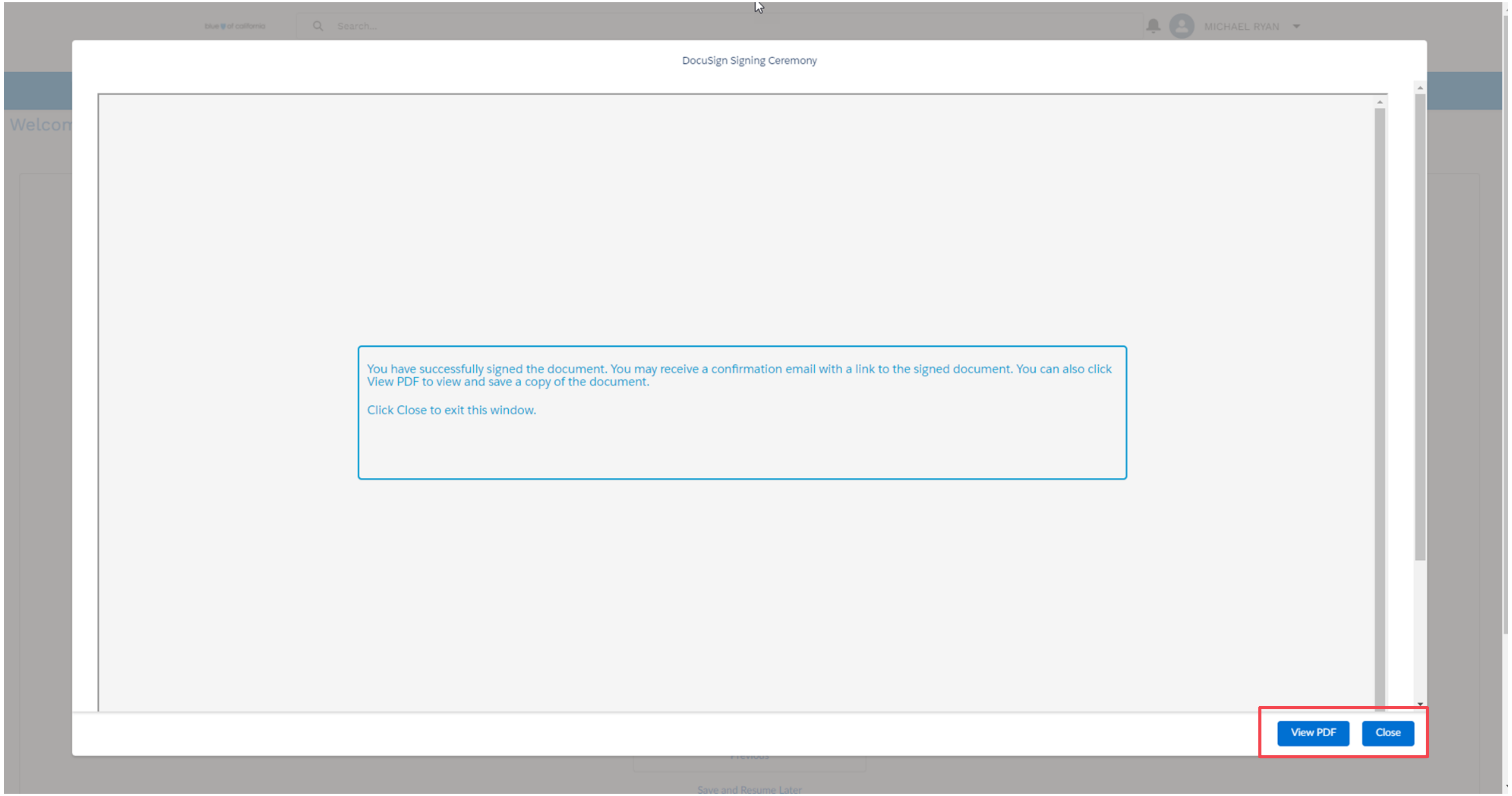
Click the *Finish* button.



Producer Agreement

RESULT:

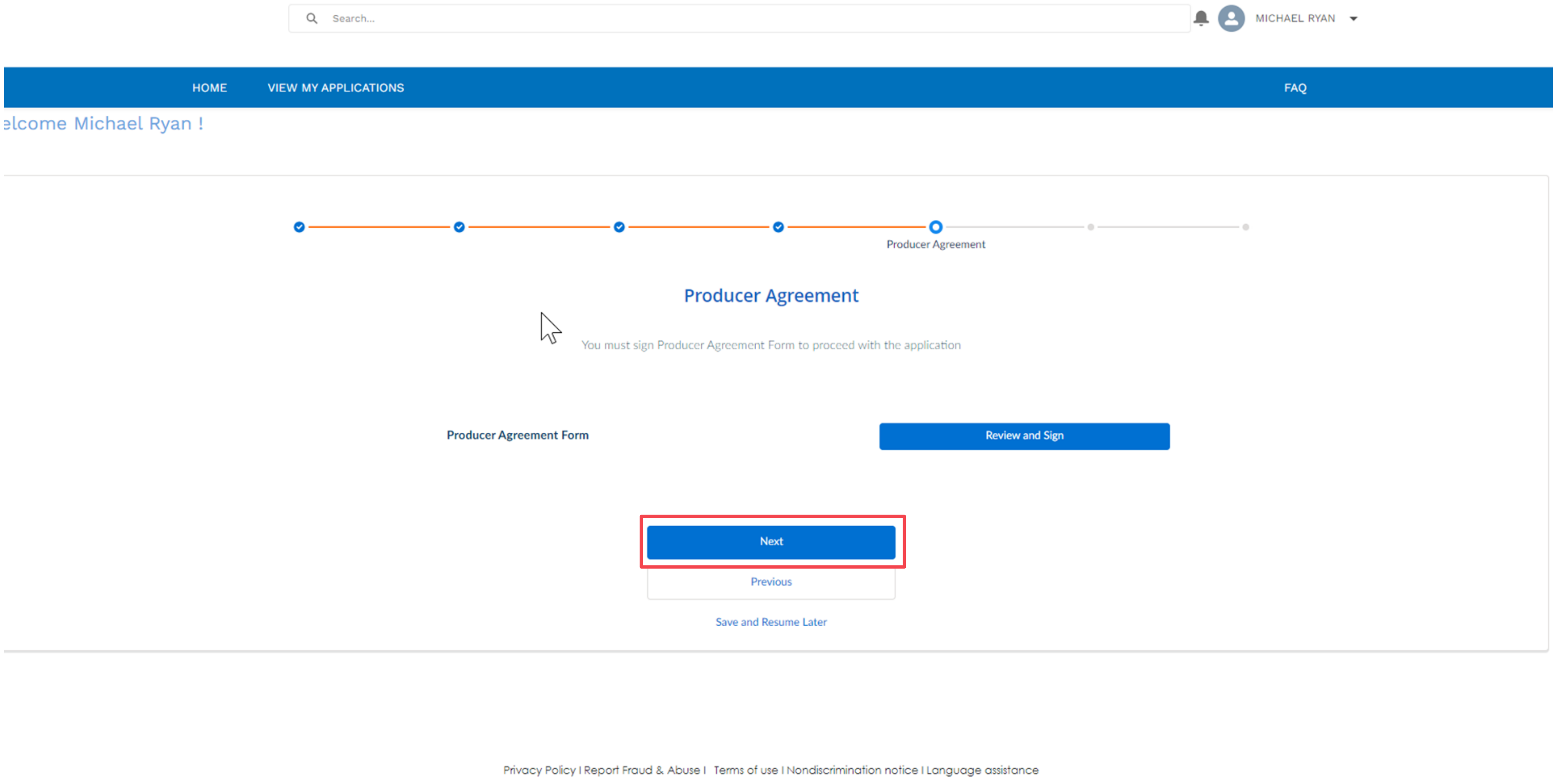
A confirmation appears when successfully signed. Choose to View the completed Producer Agreement in PDF or click *Close* button.



Producer Agreement

Step 31:

Click *Next* to review and submit the application.

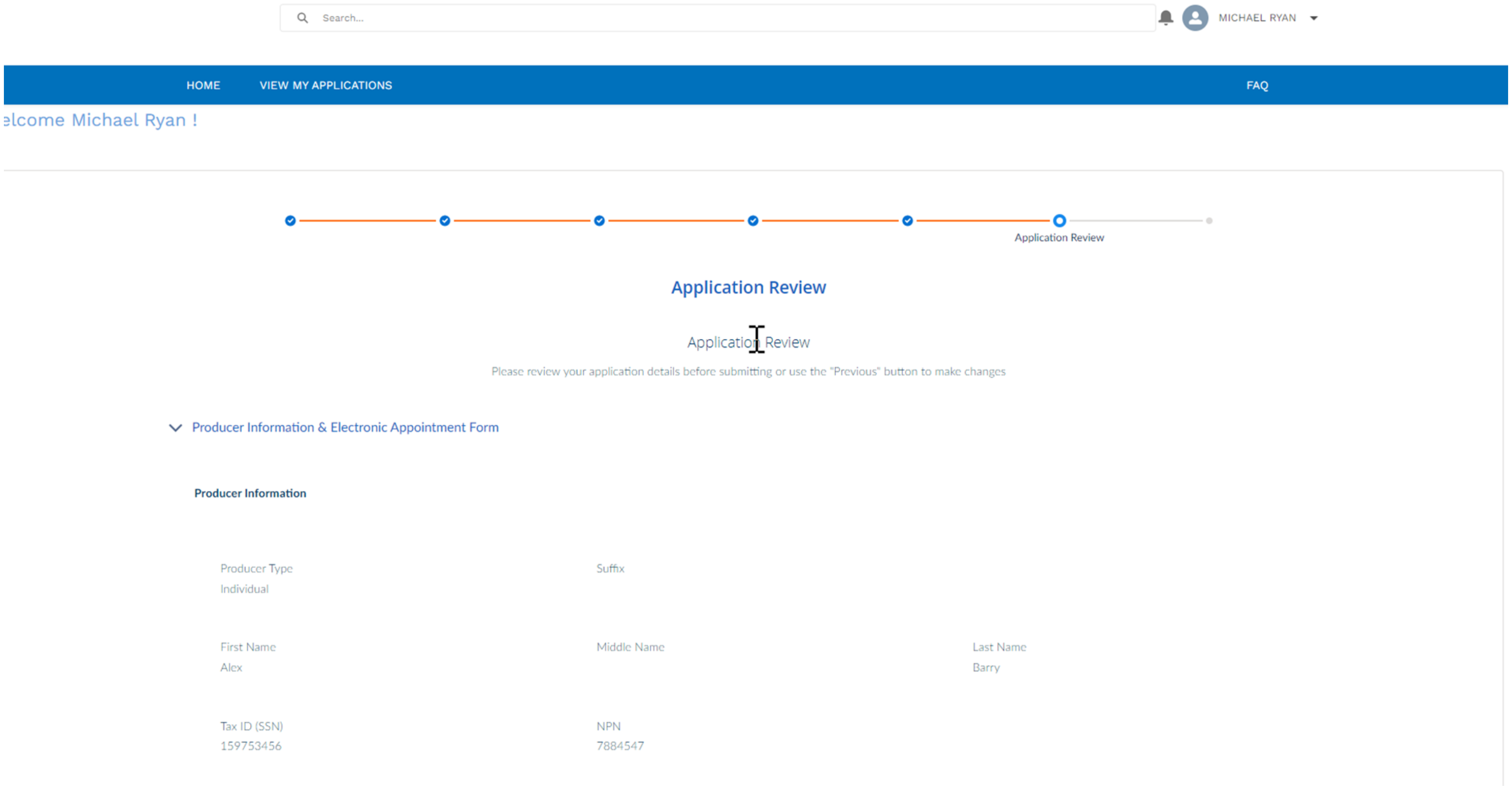


For Agent Use Only. Distributions to consumers, other insurers, or any other person or company is strictly prohibited.

Application Review

Step 32:

Use browser scroll bar and review application for accuracy.

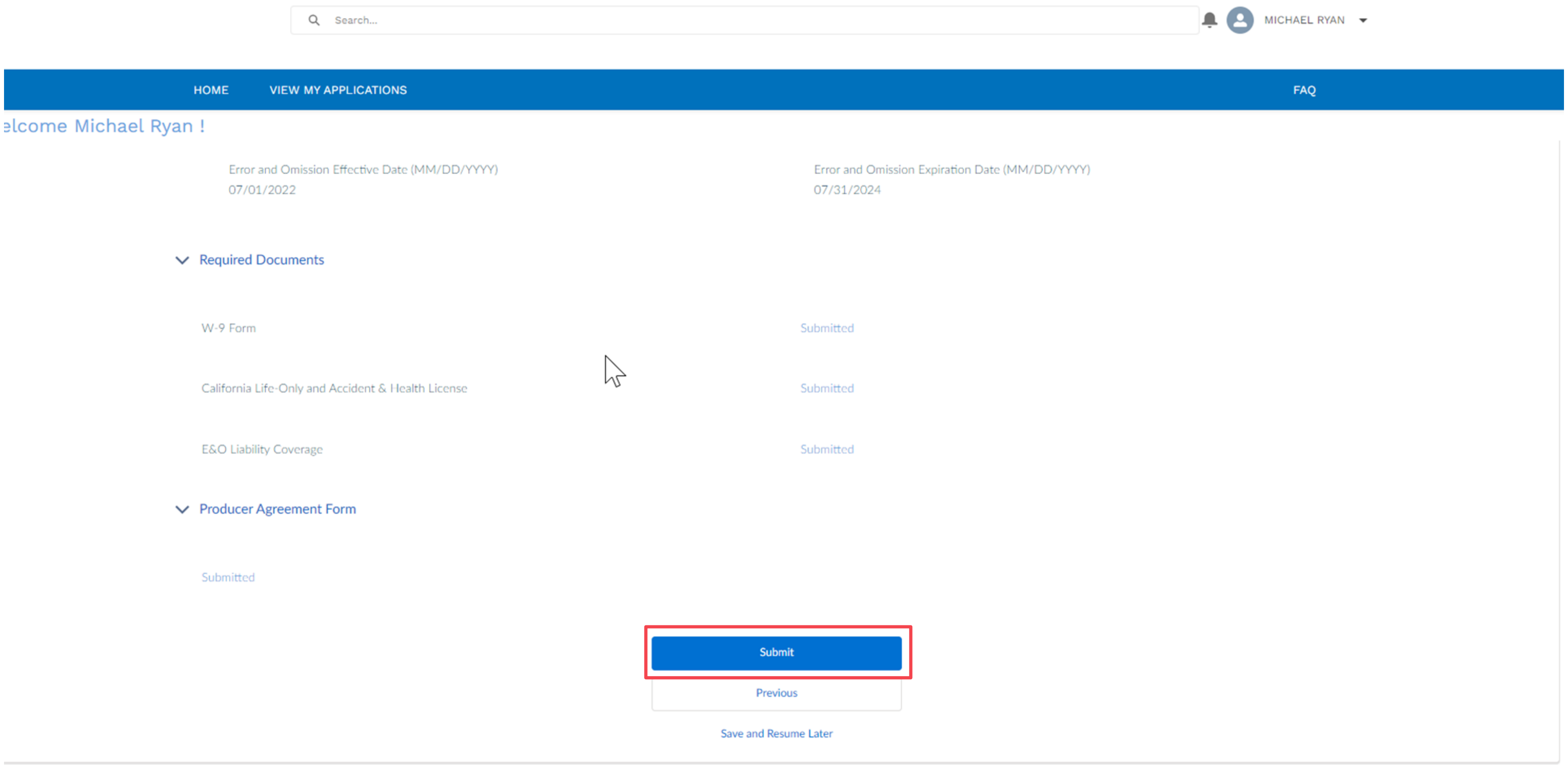


For Agent Use Only. Distributions to consumers, other insurers, or any other person or company is strictly prohibited.

Application Review

Step 33:

If satisfied all information is accurate, click *Submit* button to Blue Shield's Producer Appointment team for review and approval.



For Agent Use Only. Distributions to consumers, other insurers, or any other person or company is strictly prohibited.

Begin

Application Status Review

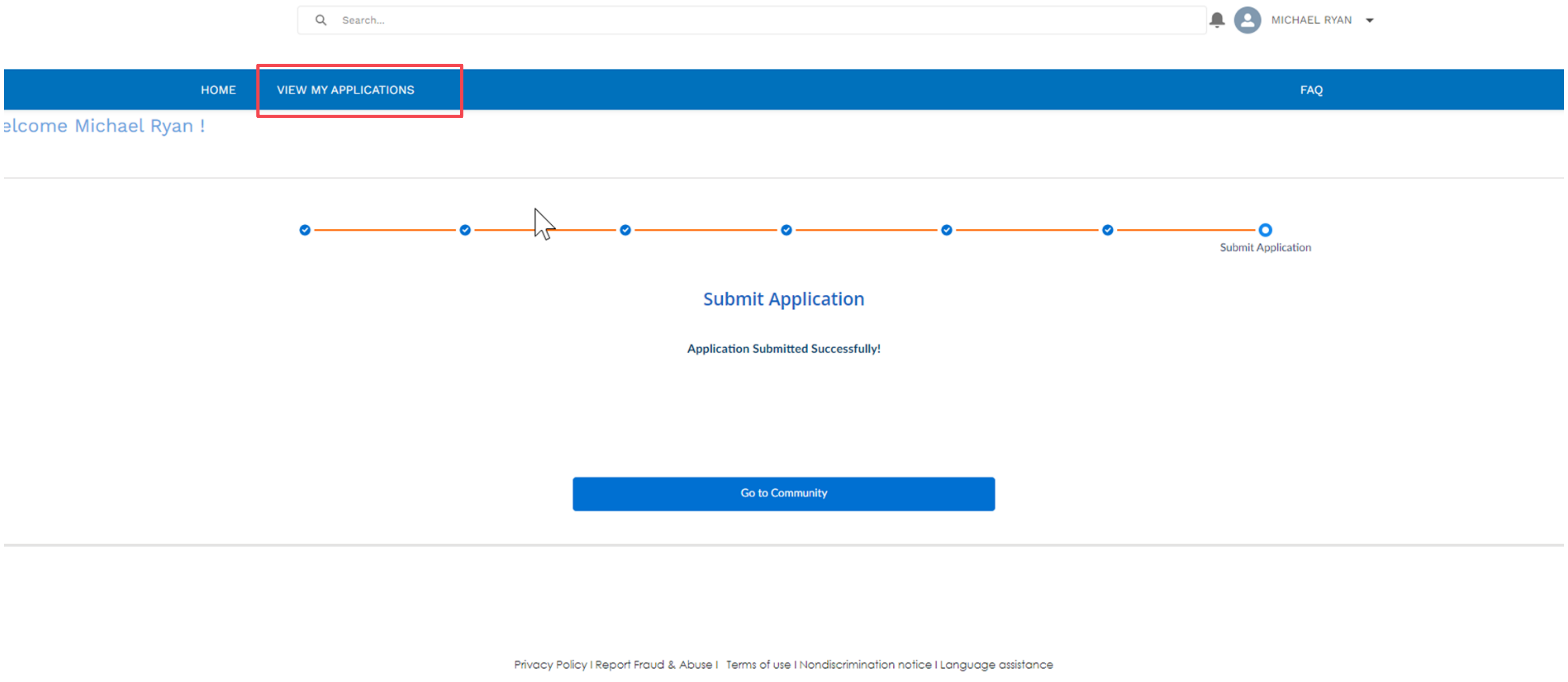
In this section you will learn how view your submitted application to check the status.

For Agent Use Only. Distributions to consumers, other insurers, or any other person or company is strictly prohibited.

Application Status Review

Step 34:

Click *View My Applications.*

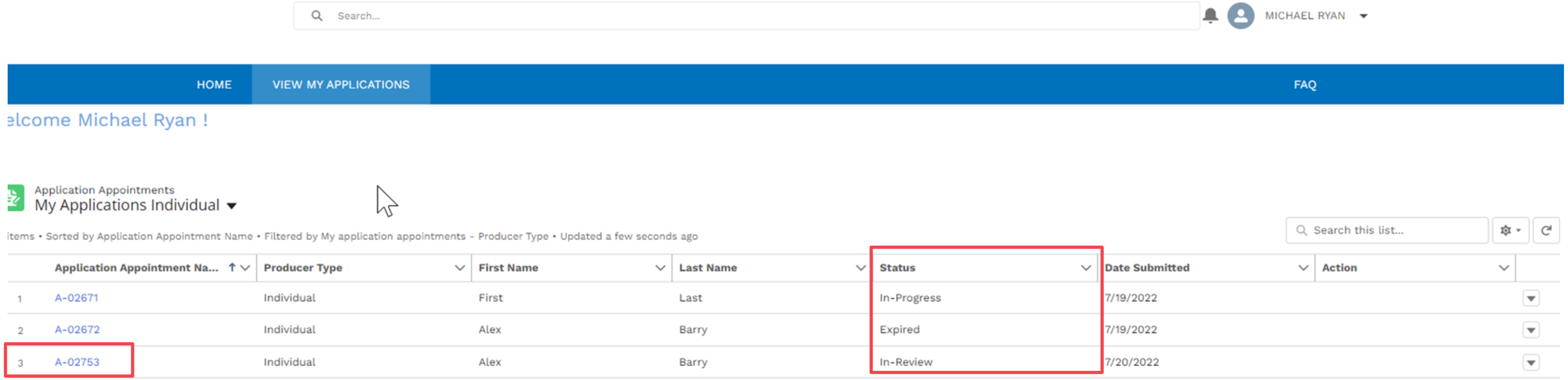


For Agent Use Only. Distributions to consumers, other insurers, or any other person or company is strictly prohibited.

Application Status Review

Step 35:

Click *Application Appointment Name* hyperlink to view details of any application listed.



	Application Appointment Na...	Producer Type	First Name	Last Name	Status	Date Submitted	Action
1	A-02671	Individual	First	Last	In-Progress	7/19/2022	
2	A-02672	Individual	Alex	Barry	Expired	7/19/2022	
3	A-02753	Individual	Alex	Barry	In-Review	7/20/2022	

NOTE:

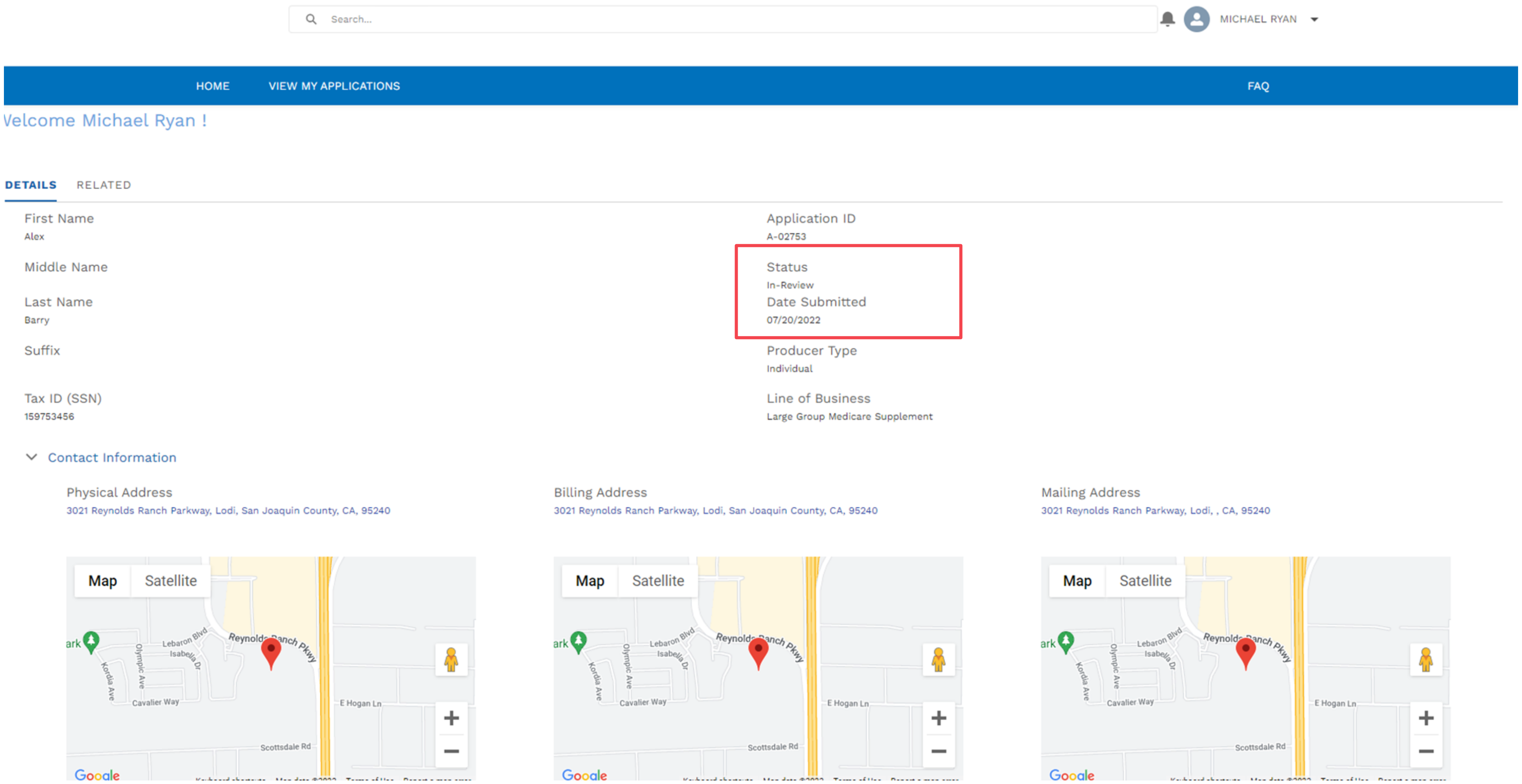
- Each application has a unique ID.
- Always check application status from *View My Applications* tab. All outstanding applications are found on this screen.

For Agent Use Only. Distributions to consumers, other insurers, or any other person or company is strictly prohibited.

Application Status Review

Step 36:

Review the application status.



For Agent Use Only. Distributions to consumers, other insurers, or any other person or company is strictly prohibited.

blue california

Blue Shield of California is an independent member of the Blue Shield Association