



Kansas City

2020 Agent Portal Redesign

Quick Guide



Why Redesign?

Design

Modernize design to improve user experience & navigation

Content

Complete review and refresh of content to make important information easier to find

Technical

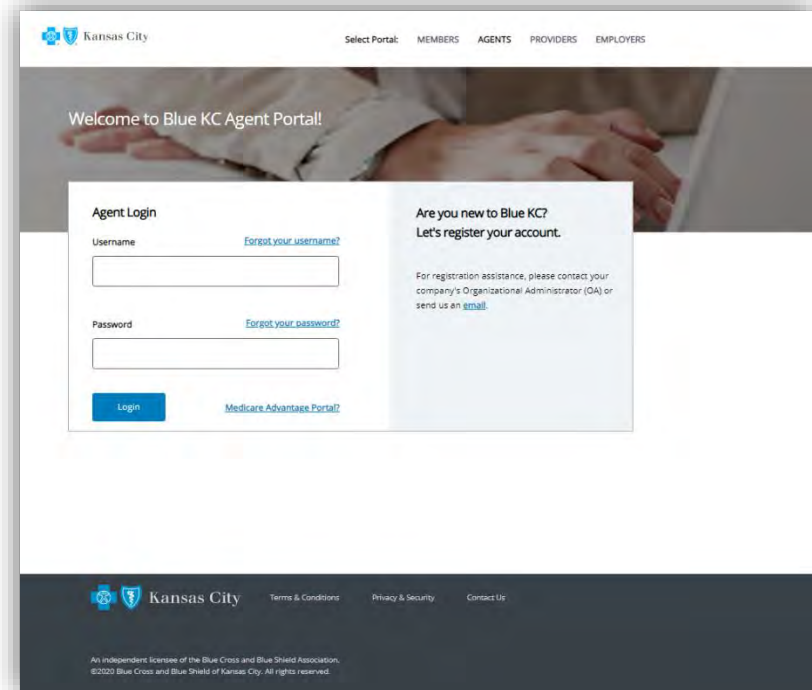
Alternate registration processes, improved organizational administrator functions, and streamlined password resets

Same Functions, New Look

Login Page

New Login Page

Current Login Page



Please contact Producerinfo@bluekc.com or 816-395-3266 for Username or Password issues.

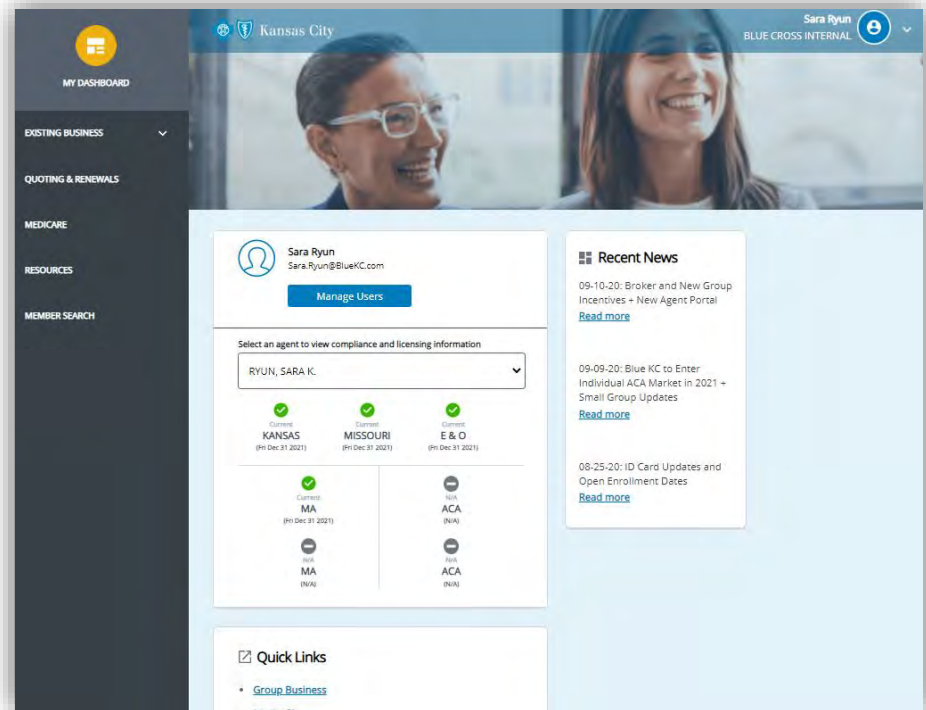
Same Functions, New Look

Home Page/Dashboard

Current Dashboard

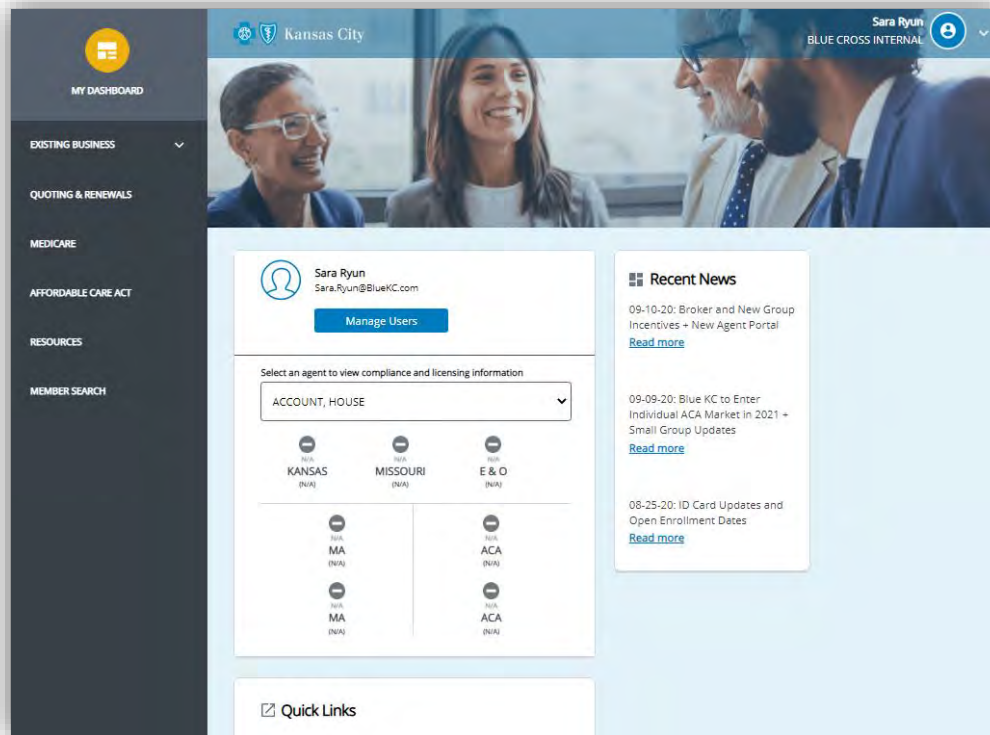


New Dashboard



My Dashboard

Links on the left or throughout page as user scrolls

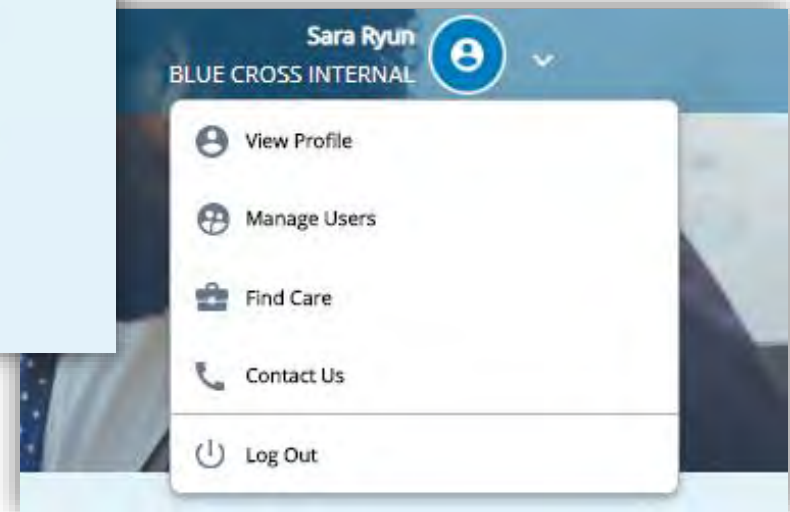


Licensing at a glance; Quick Links



View Agent Profile:

- Update email
- Update username
- Update password
- Agent ID information
- Agency Information



Existing Business Search

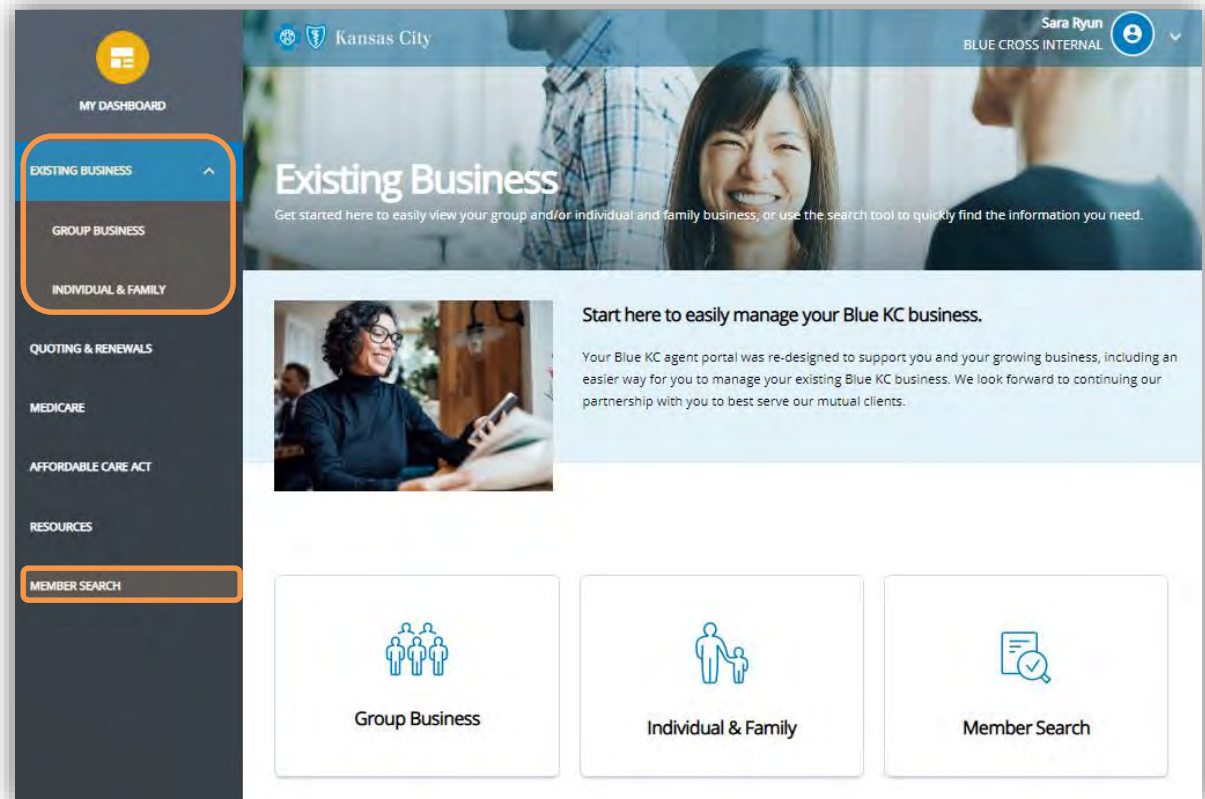
Search current members by Group, Individual & Family or Universal Member Search

Search for group and member information:

- Group Name
- Group ID
- Member ID
- Member Name

Filter for:

- Agent
- Effective Date
- Product Type
- Line of Business
- Member Status



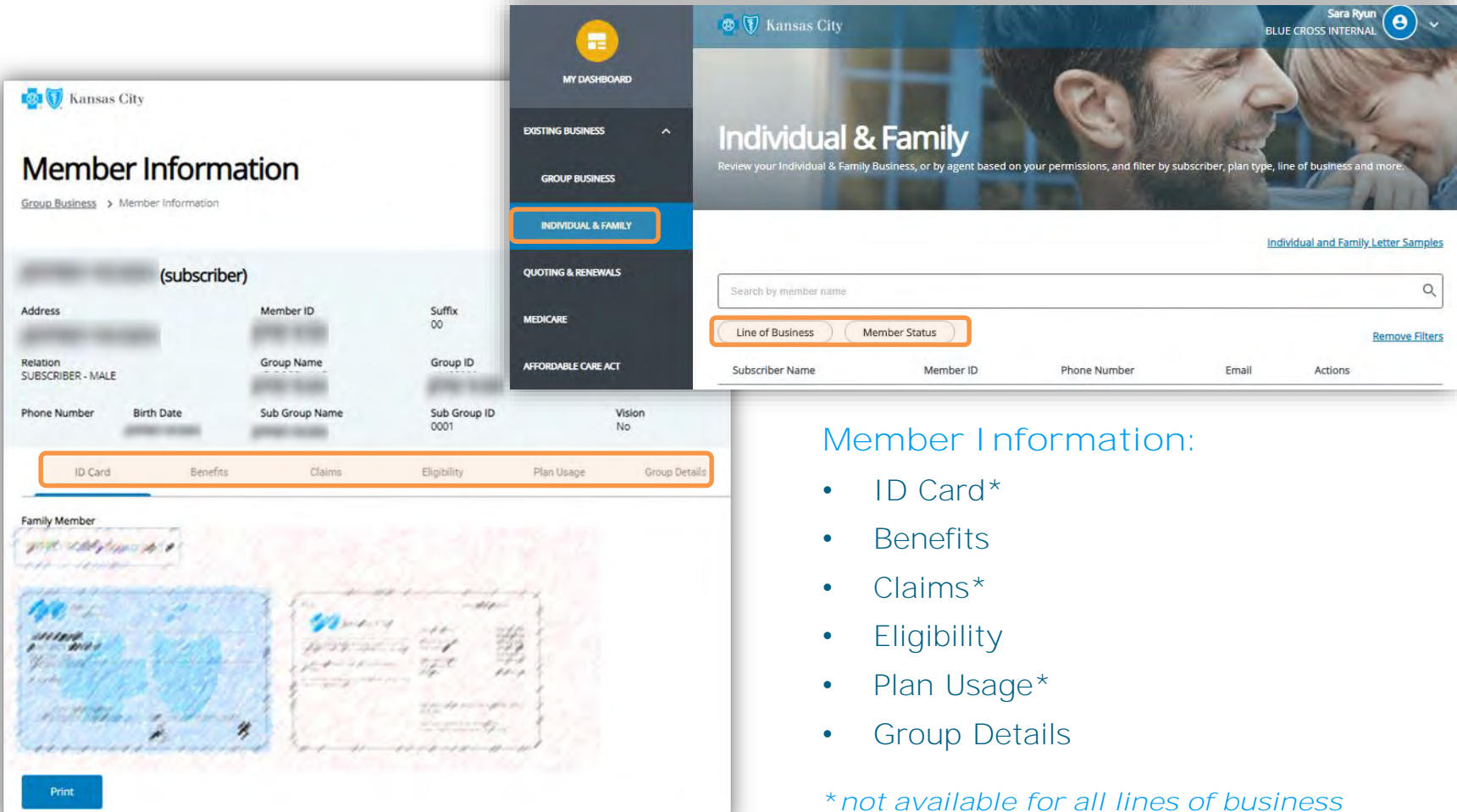
Search current Groups & Group members

- Sub Groups
- Employees
- Members
- Billing
- Class
- Plan Type
- Total Enrollees

Group Name		MEMBER SEARCH	Group Name	Group ID	Age
Address 1041 E 40 HIGHWAY P.O. BOX 16537 DANSAS CITY MO 64136		Agent Name PATRICK J	Waiting Period N/A		
Email JESSICA@1RENTALS.COM		Agent ID 0000000000	Last Billed 31-Mar-2020		
Phone 816-373-0234	Fax 816-373-9353	Effective Date 01-May-2005	Paid To 31-jan-2020		
<div>Sub Groups Employees Members Billing</div>					

Individual & Family Search

Search current Individual & Family members



The screenshot displays the 'Individual & Family' search interface. On the left, the 'Member Information' section shows fields for Address, Member ID, Suffix, Relation (SUBSCRIBER - MALE), Group Name, Group ID, Phone Number, Birth Date, Sub Group Name, Sub Group ID (0001), and Vision No. Below this, a horizontal menu highlights 'ID Card', 'Benefits', 'Claims', 'Eligibility', 'Plan Usage', and 'Group Details'. The main search area on the right features a search bar, filters for 'Line of Business' and 'Member Status', and a table with columns: Subscriber Name, Member ID, Phone Number, Email, and Actions. A 'Remove Filters' link is also present.

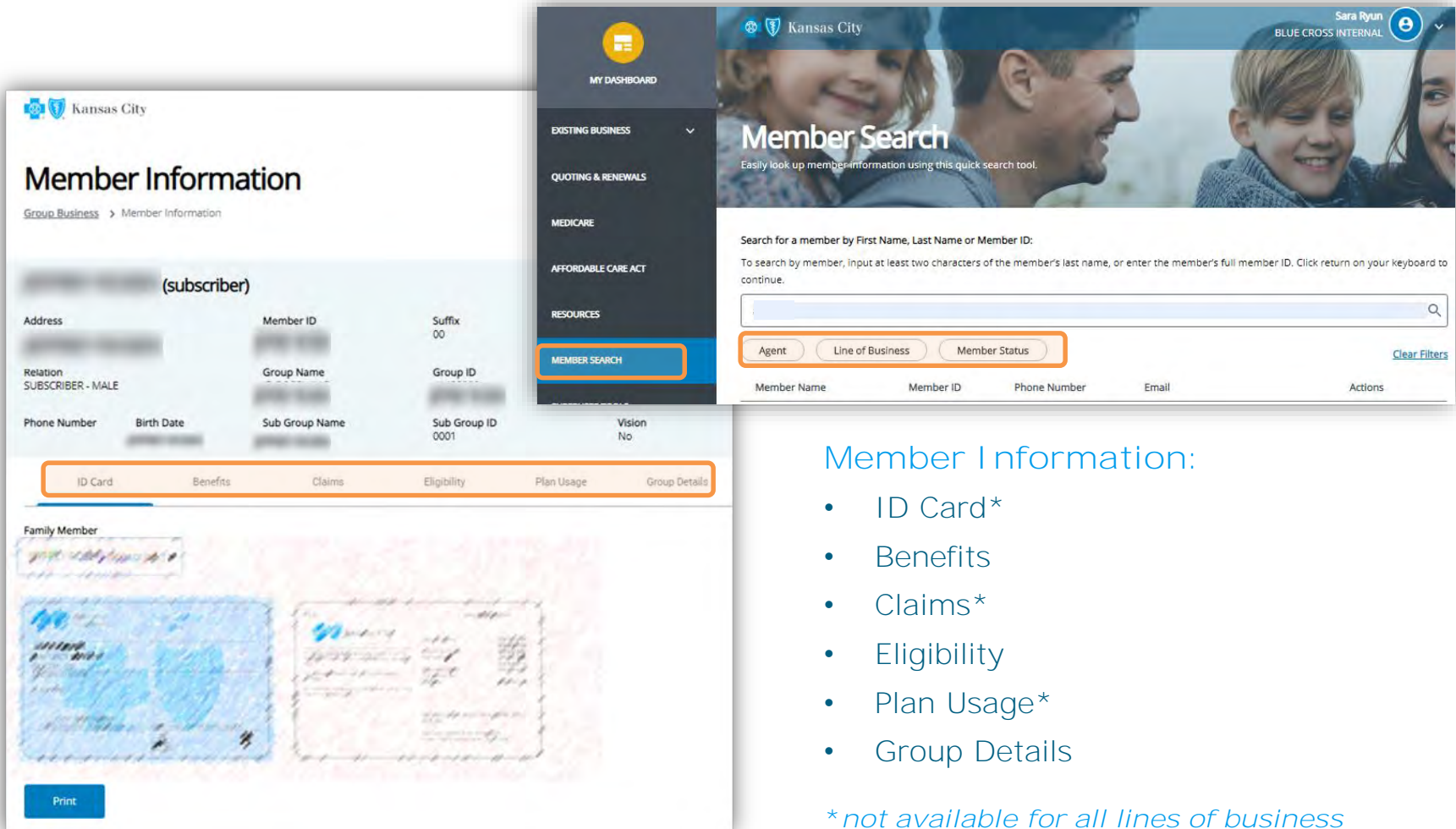
Member Information:

- ID Card*
- Benefits
- Claims*
- Eligibility
- Plan Usage*
- Group Details

** not available for all lines of business*

Universal Member Search

Search all lines of business



The screenshot displays the 'Universal Member Search' interface. On the left, the 'Member Information' section shows fields for Address, Member ID, Suffix, Relation (SUBSCRIBER - MALE), Group Name, Group ID, Phone Number, Birth Date, Sub Group Name, Sub Group ID (0001), and Vision No. Below this is a tabbed interface with 'ID Card', 'Benefits', 'Claims', 'Eligibility', 'Plan Usage', and 'Group Details' tabs. The 'ID Card' tab is active, showing a preview of a Blue Cross ID card. On the right, the 'Member Search' section features a search bar with the prompt 'Search for a member by First Name, Last Name or Member ID:'. Below the search bar are filters for 'Agent', 'Line of Business', and 'Member Status'. A 'Clear Filters' link is also present. At the bottom of the search section, there is a table with columns: Member Name, Member ID, Phone Number, Email, and Actions.

Member Information:

- ID Card*
- Benefits
- Claims*
- Eligibility
- Plan Usage*
- Group Details

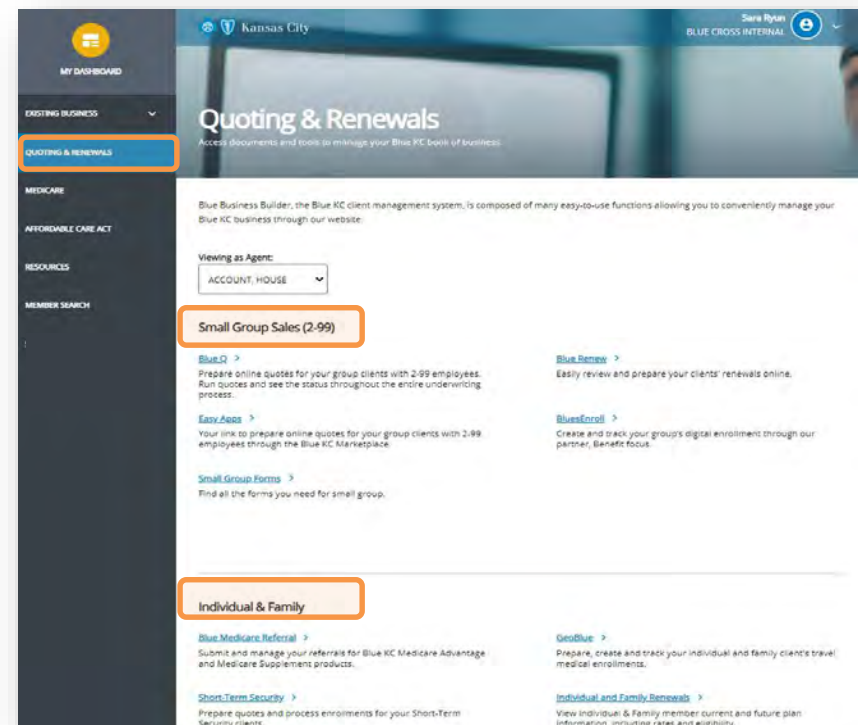
** not available for all lines of business*

Quoting & Renewals

Same options, easier to navigate

New

Current



TIP

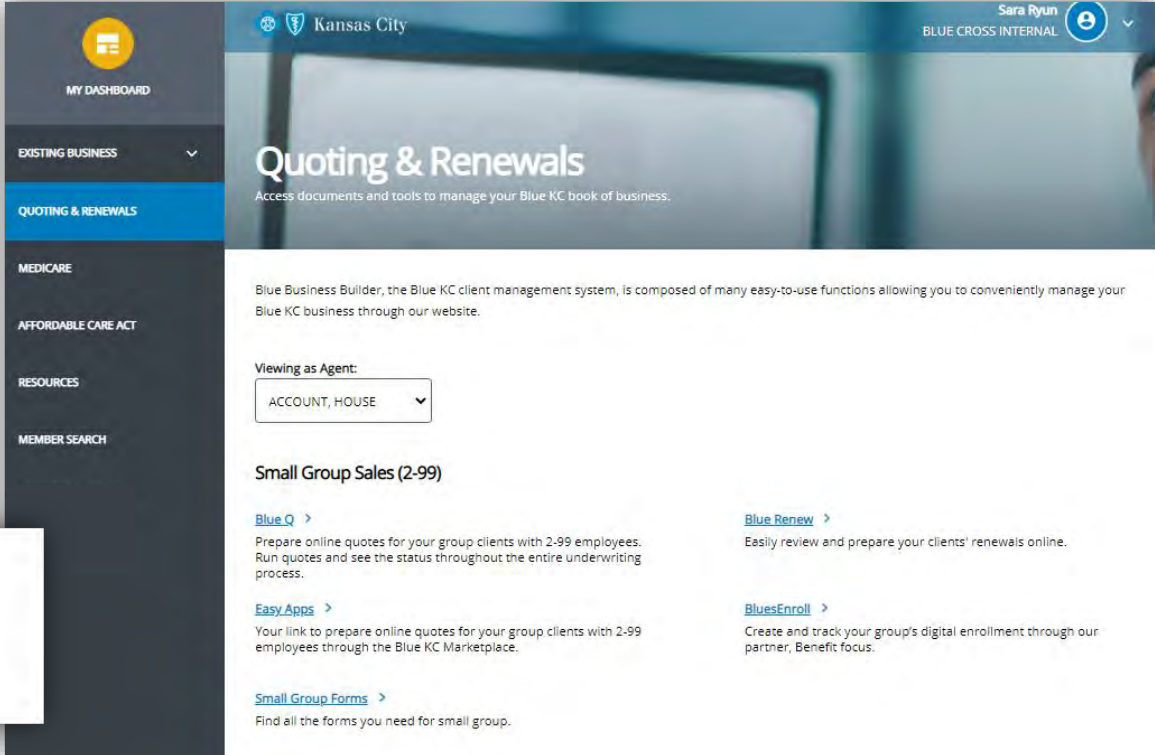
Small Group Sales is at the top. Scroll down to view Individual & Family Sales.

Quoting & Renewals

Small Group Sales Applications

Small Group Sales:

- Blue Q
- Blue Renew
- Easy Apps
- Blues Enroll
- Small Group Forms



Viewing as Agent:

ACCOUNT, HOUSE

Small Group Sales (2-99)

[Blue Q](#) >
Prepare online quotes for your group clients with 2-99 employees. Run quotes and see the status throughout the entire underwriting process.

[Blue Renew](#) >
Easily review and prepare your clients' renewals online.

[Easy Apps](#) >
Your link to prepare online quotes for your group clients with 2-99 employees through the Blue KC Marketplace.

[Blues Enroll](#) >
Create and track your group's digital enrollment through our partner, Benefit focus.

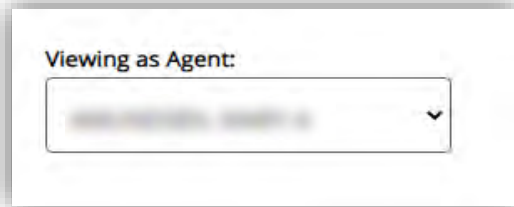
[Small Group Forms](#) >
Find all the forms you need for small group.

Contact 816-561-5669 or smallgroupservice@BlueKC.com with questions.

Quoting & Renewals

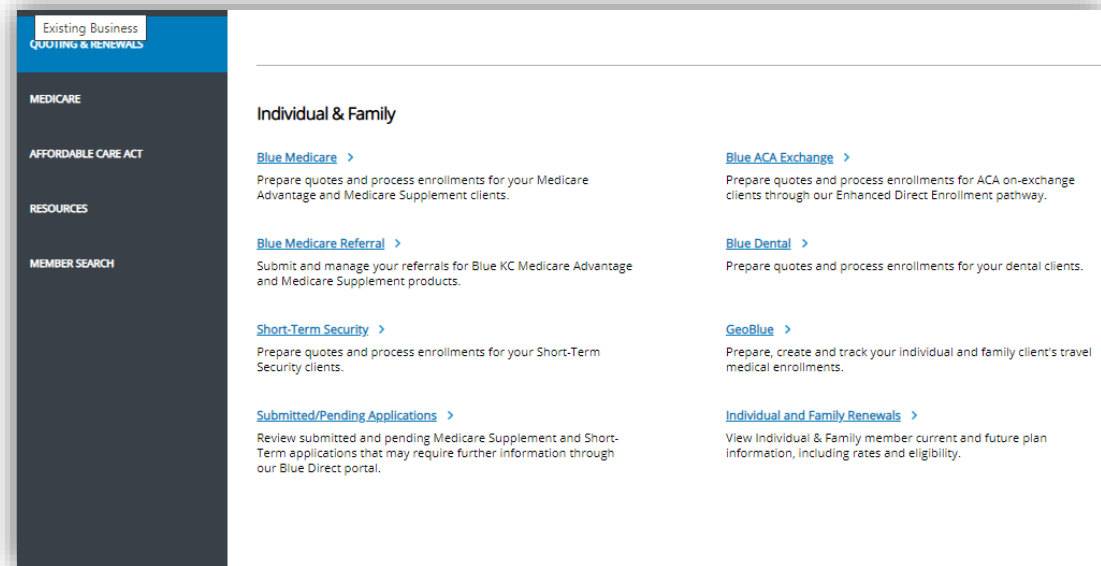
Individual & Family Sales Applications

*Available dependent on certifications**



Individual & Family Products:

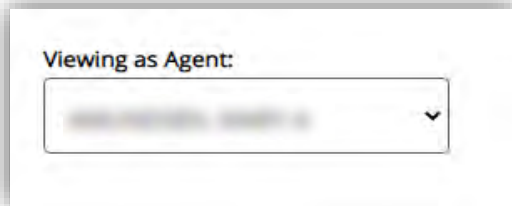
- Blue Medicare
Advantage and Supplement applications
- Blue ACA Exchange
On-exchange ACA applications
- Blue Medicare Referrals
- Blue Dental
- Short-Term Security
- GeoBlue
- Submitted/Pending applications (Blue Direct):
Short Term, Medicare Supplement and Off-Exchange applications requiring further information
- Individual Renewals



**Visible links will depend on certification with Blue KC*

New Medicare Resources

*Available dependent on certifications**

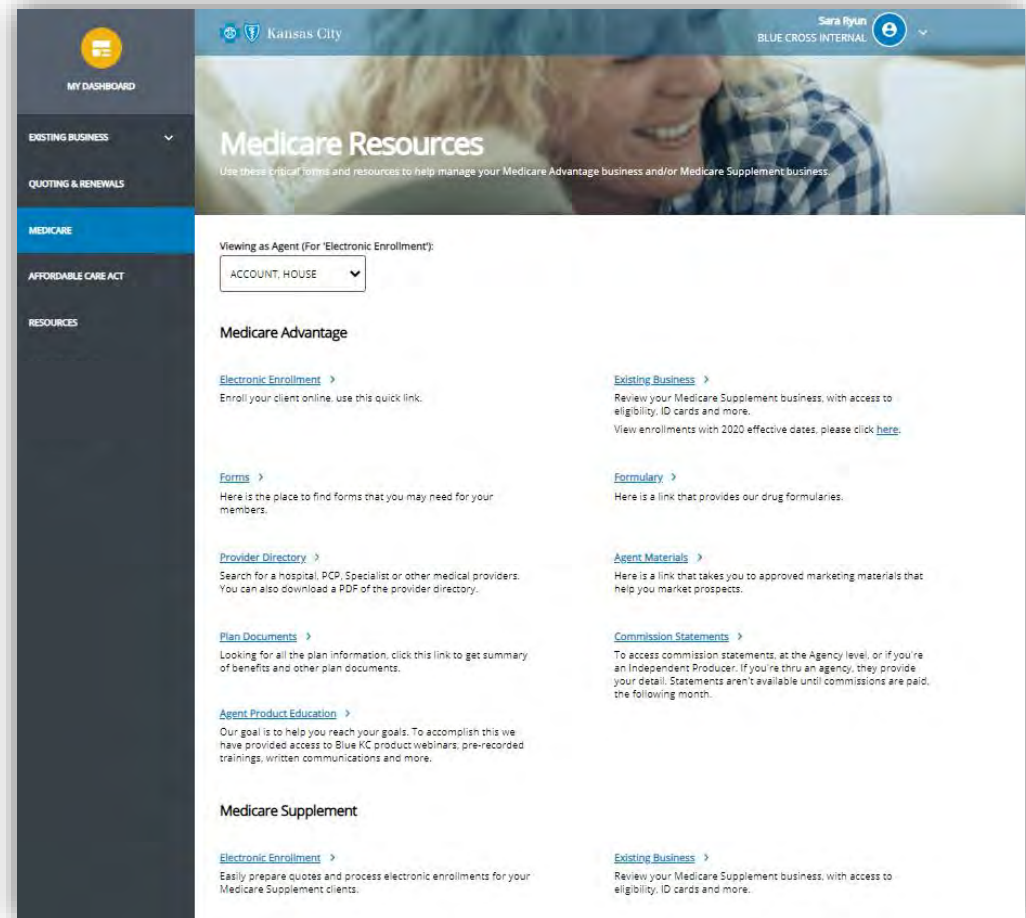


One centralized location for Medicare Advantage & Medicare Supplement resources.

Commission & Appointment
Producerinfo@BlueKC.com

Nick Sweatt, Broker Support
 816-360-1044
Nick.Sweatt@BlueKC.com

George Mathis, Enrollment Support
 816-360-1076
George.Mathis@BlueKC.com

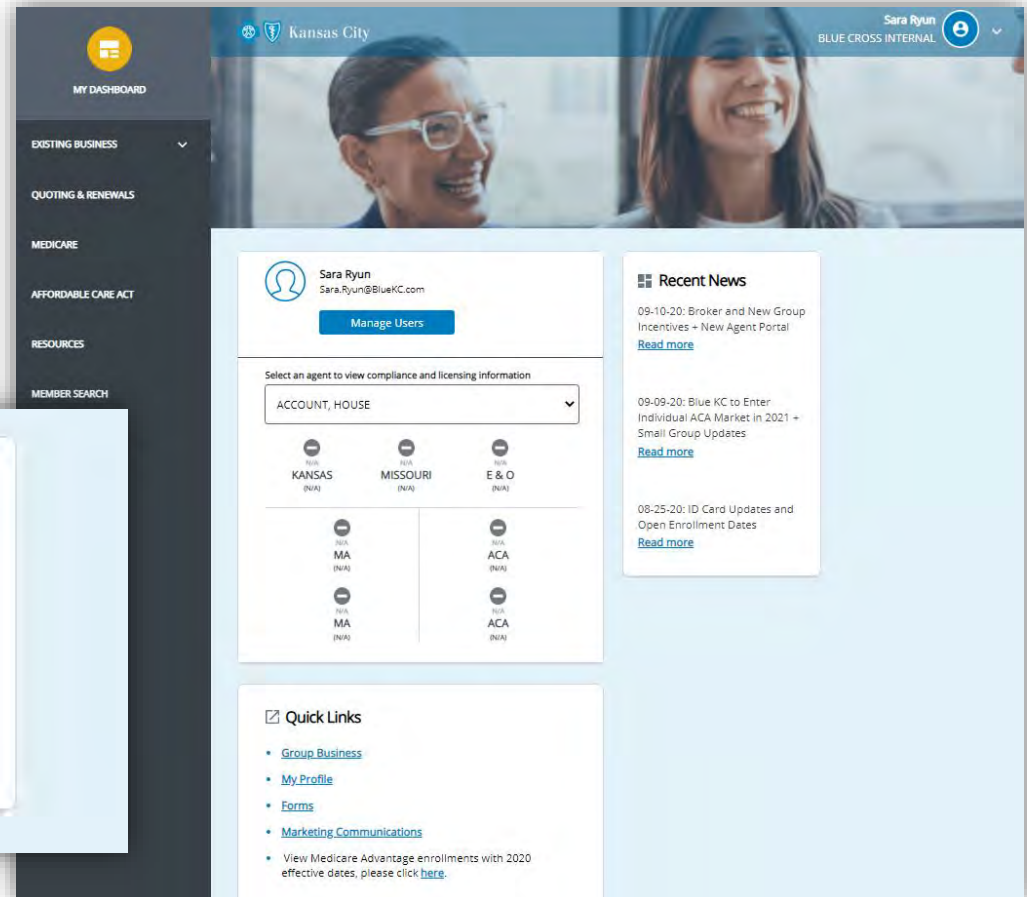
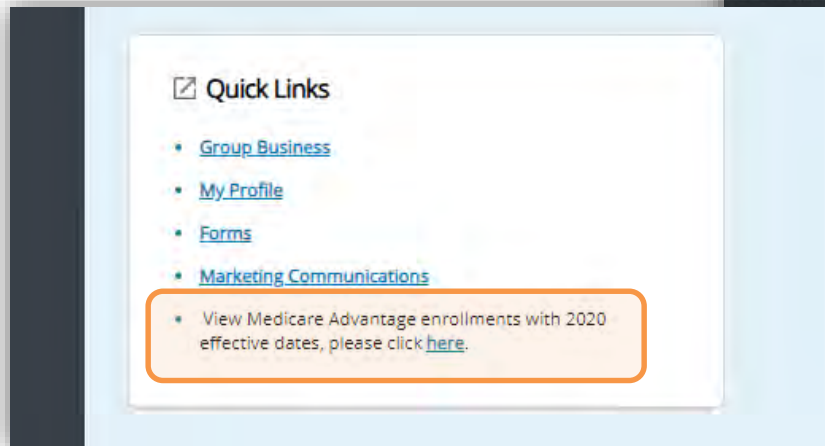


New Medicare Resources

Medicare Sales Resources

*Available dependent on certifications**

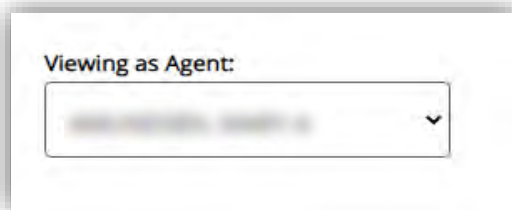
Note: View Medicare Advantage Enrollments with 2020 effective dates at the former [Medicare Advantage Portal](#).



New Affordable Care Act Resources

ACA Sales Resources

*Available dependent on certifications**

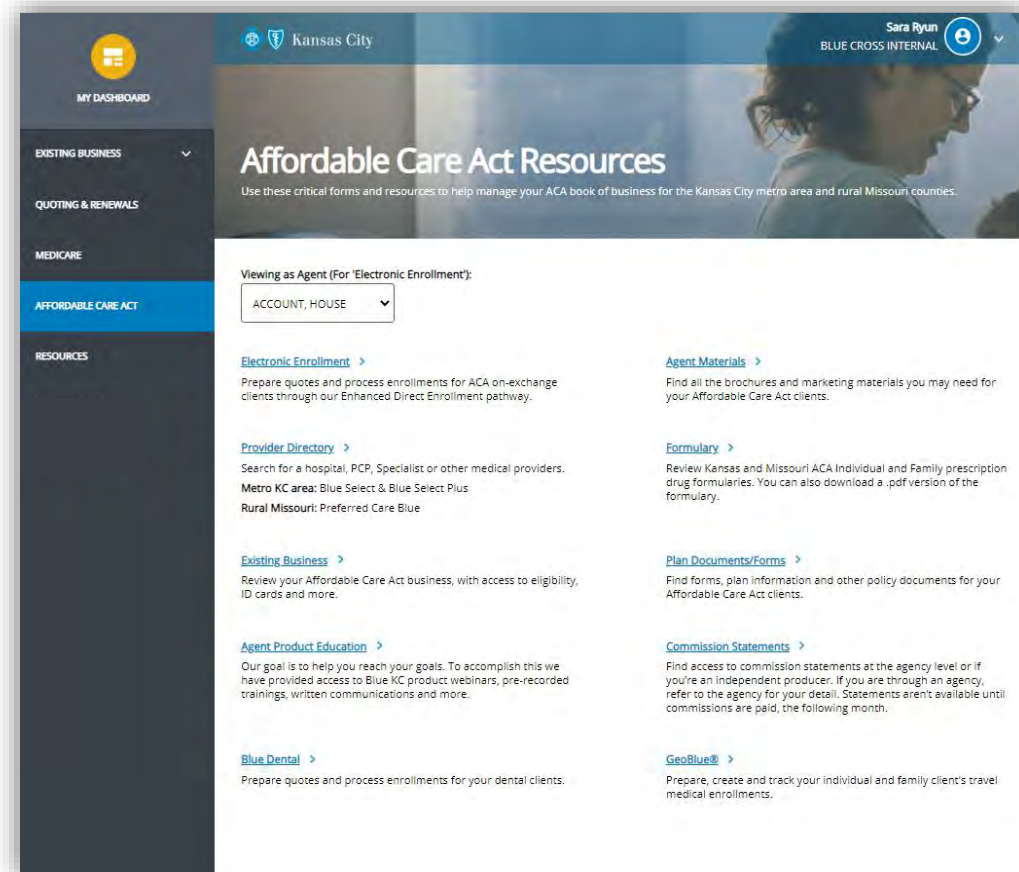


One centralized location for Individual & Family Affordable Care Act resources.

Commission & Appointment
Producerinfo@BlueKC.com

Broker Product/Enrollment Questions
 800-239-3389
Products@BlueKC.com

Broker Services (Members)
 816-395-3266
Broker_services@BlueKC.com

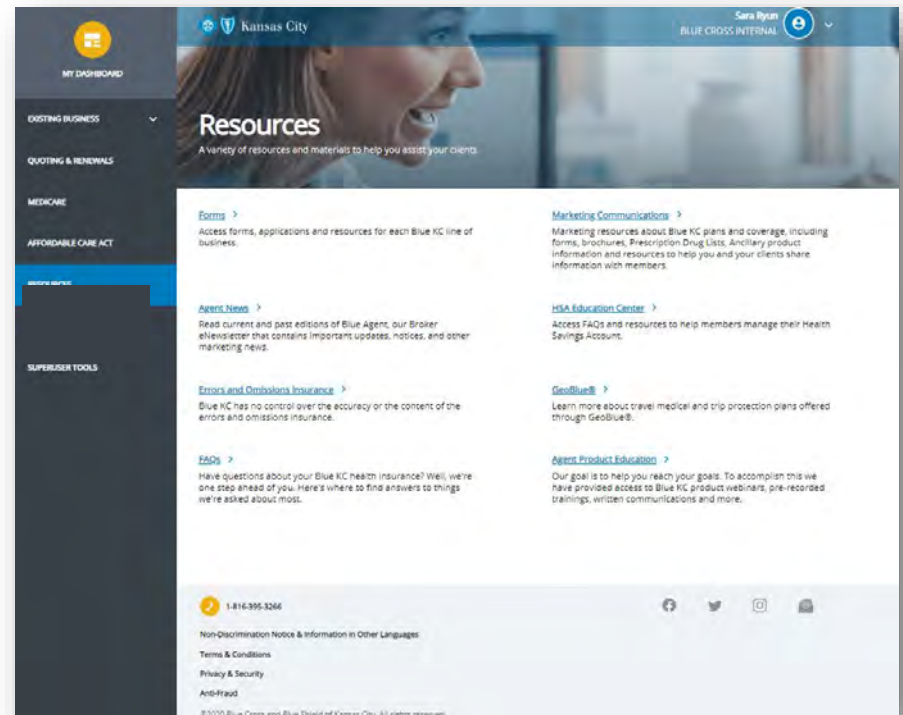


Resources

Same options, easier to navigate

New

Current

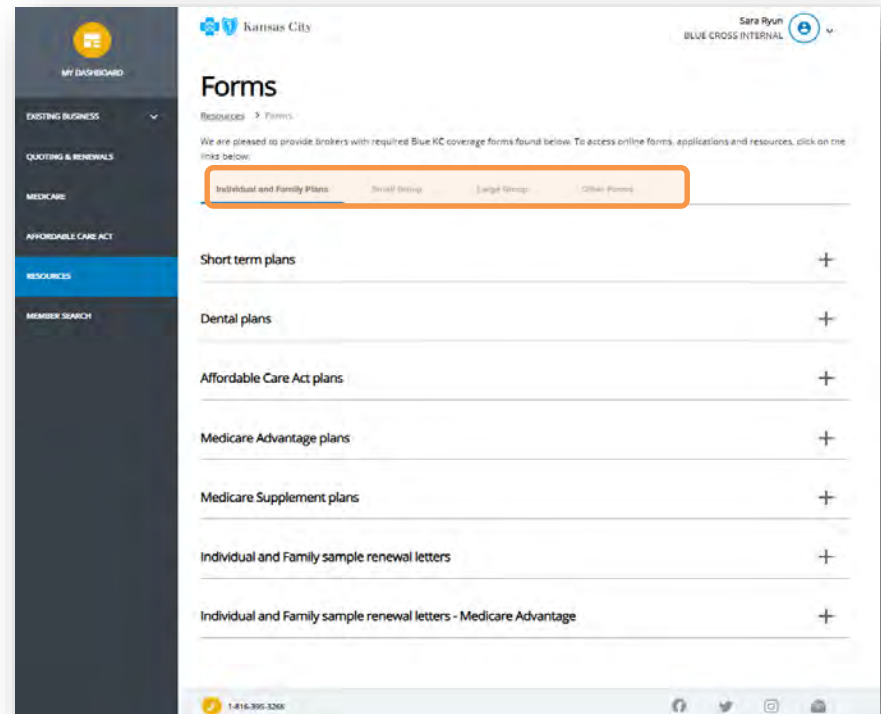


Resources: Forms

Same options, easier to navigate

New

Current

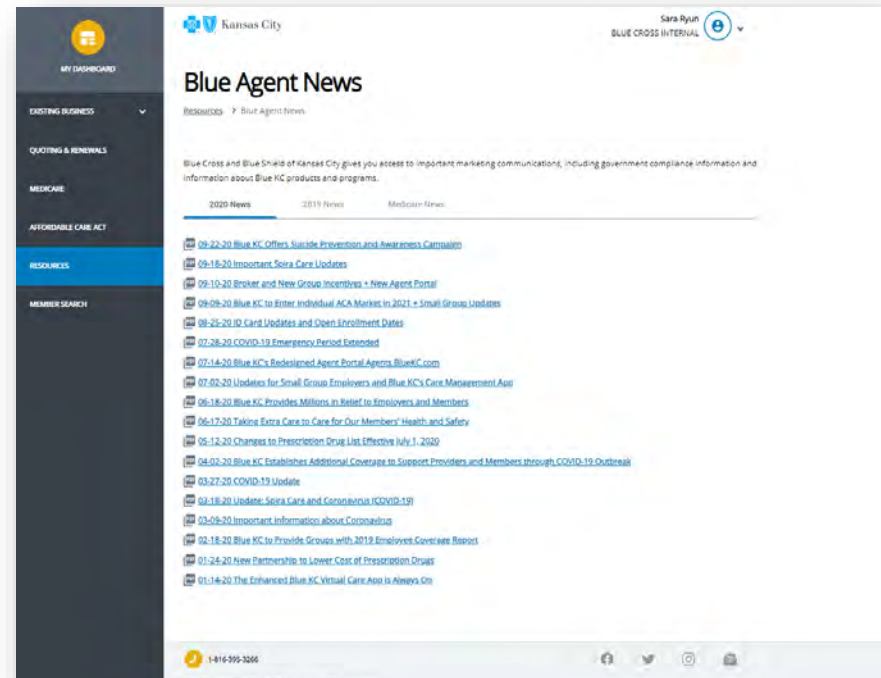


Resources: Agent News

Same options, easier to navigate

New

Current

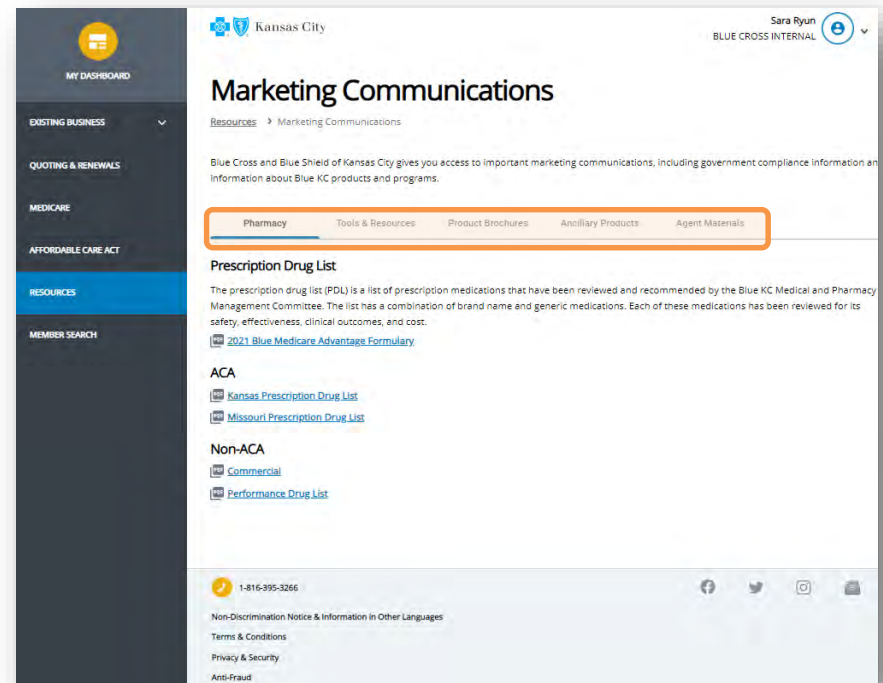
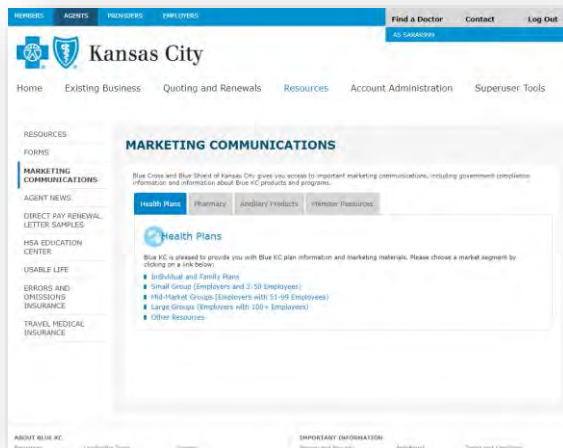


Resources: Marketing Communications

Same options, easier to navigate

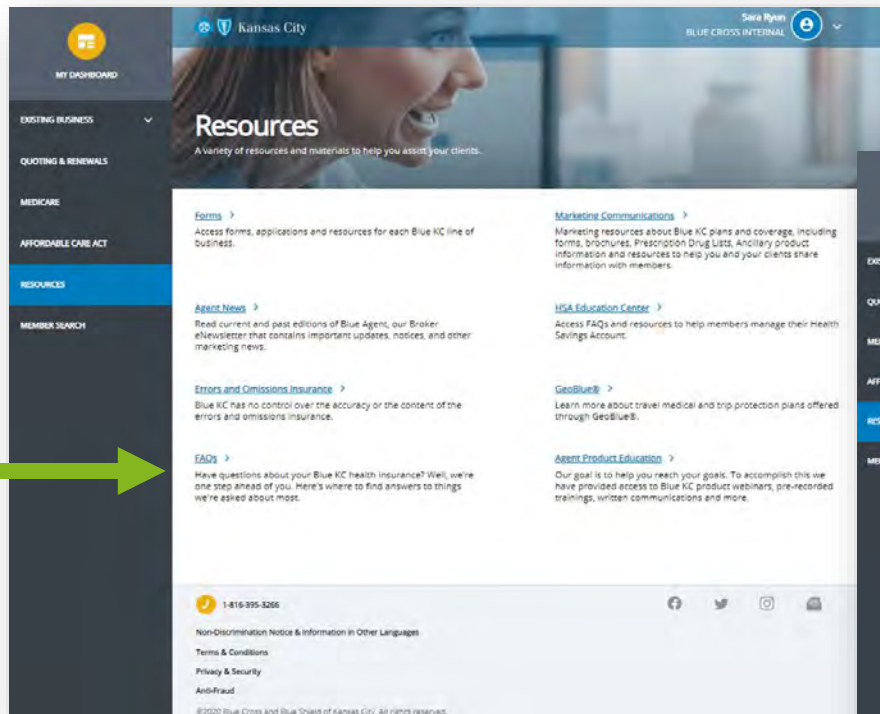
New

Current



Resources: FAQ (new)

New Frequently Asked Questions & Answers



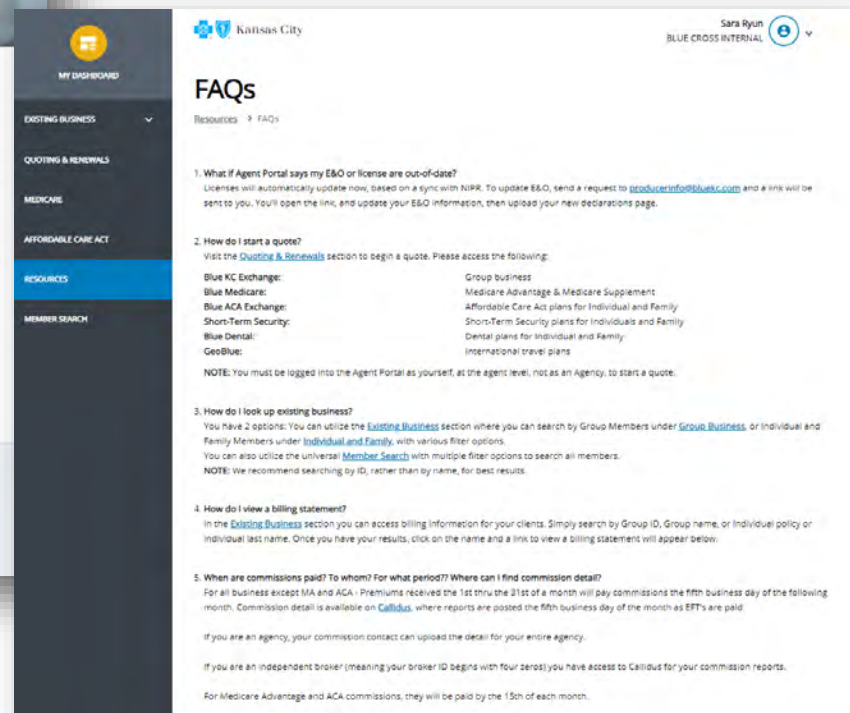
Resources
A variety of resources and materials to help you assist your clients.

- Forms** > Access forms, applications and resources for each Blue KC line of business.
- Agent News** > Read current and past editions of Blue Agent, our Broker eNewsletter that contains important updates, notices, and other marketing news.
- Errors and Omissions Insurance** > Blue KC has no control over the accuracy or the content of the errors and omissions insurance.
- FAQs** > Have questions about your Blue KC health insurance? Well, we're one step ahead of you. Here's where to find answers to things we're asked about most.
- Marketing Communications** > Marketing resources about Blue KC plans and coverage, including forms, brochures, Prescription Drug Lists, Ancillary product information and resources to help you and your clients share information with members.
- HSA Education Center** > Access FAQs and resources to help members manage their Health Savings Account.
- GeoBlue®** > Learn more about travel medical and trip protection plans offered through GeoBlue®.
- Agent Product Education** > Our goal is to help you reach your goals. To accomplish this we have provided access to Blue KC product webinars, pre-recorded trainings, written communications and more.

1-816-395-3266

Non-Discrimination Notice & Information in Other Languages
Terms & Conditions
Privacy & Security
Anti-Fraud

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FAQs
Resources > FAQs

- What if Agent Portal says my E&O or license are out-of-date?**
Licenses will automatically update now, based on a sync with NIPR. To update E&O, send a request to eproducerinfo@bluekc.com and a link will be sent to you. You'll open the link, and update your E&O information, then upload your new declarations page.
- How do I start a quote?**
Visit the [Quoting & Renewals](#) section to begin a quote. Please access the following:

Blue KC Exchange:	Group business
Blue Medicare:	Medicare Advantage & Medicare Supplement
Blue ACA Exchange:	Affordable Care Act plans for Individual and Family
Short-Term Security:	Short-Term Security plans for Individuals and Family
Blue Dental:	Dental plans for Individual and Family
GeoBlue:	International travel plans

NOTE: You must be logged into the Agent Portal as yourself, at the agent level, not as an Agency, to start a quote.
- How do I look up existing business?**
You have 2 options: You can utilize the [Existing Business](#) section where you can search by Group Members under [Group Business](#), or Individual and Family Members under [Individual and Family](#), with various filter options. You can also utilize the universal [Member Search](#) with multiple filter options to search all members.
NOTE: We recommend searching by ID, rather than by name, for best results.
- How do I view a billing statement?**
In the [Existing Business](#) section you can access billing information for your clients. Simply search by Group ID, Group name, or Individual policy or Individual last name. Once you have your results, click on the name and a link to view a billing statement will appear below.
- When are commissions paid? To whom? For what period? Where can I find commission detail?**
For all business except MA and ACA - Premiums received the 1st thru the 31st of a month will pay commissions the fifth business day of the following month. Commission detail is available on [Callidus](#), where reports are posted the fifth business day of the month as EFTs are paid.

If you are an agency, your commission contact can upload the detail for your entire agency.

If you are an independent broker (meaning your broker ID begins with four zeros) you have access to Callidus for your commission reports.

For Medicare Advantage and ACA commissions, they will be paid by the 15th of each month.

CONTACTS

Username & Password Issues:

- Producerinfo@bluekc.com or 816-395-3266

Commissions & Appointment:

- Producerinfo@bluekc.com

Small Group:

- smallgroupservice@BlueKC.com or 816-561-5669

Medicare Advantage & Supplement:

- Broker Support: Nick Sweatt, Nick.Sweatt@BlueKC.com or 816-360-1044
- Enrollment Support: George Mathis, George.Mathis@BlueKC.com or 816-360-1076

Individual & Family/ACA (non-Medicare):

- Product or enrollment questions: Products@bluekc.com or 800-239-3389
- Member/Client questions: broker_services@bluekc.com or 816-395-3266
- Individual & Family, Supervisor: Sara Ryun, Sara.Ryun@BlueKC.com or 816-395-3073