Blue KC 2022 MA Agent Recertification Guide

Getting into the 2022 BlueKC Recertification System:

Accessing the System:
When recertification begins, you will receive an email from Blue KC MA Recertification:
.

Kansas City

Dear (Agent name)

You are ready to update your information with Blue KC!

Please use the information below to log in and submit your changes.

Link Workflow URL

Username agent.email@address.com

Password BCBSKC@209709

Click on the "Workflow URL" in the email above, which will take you to the login screen. Illustration of the login screen is below:

SAP

User Name *
|

Password *

Domain
bcbskc

Sign In
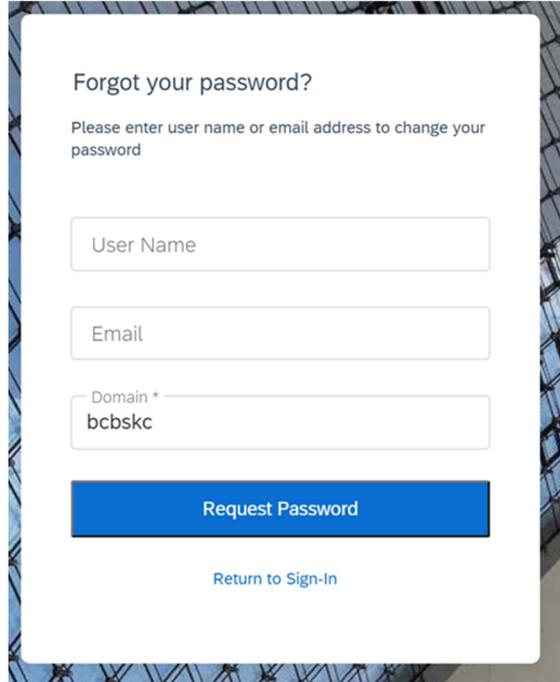
Remember Me   Forgot Password?

Here you will type in your username & password in the boxes and <u>VERIFY the "Domain" box contains bcbskc</u>

Note:
- <u>DO NOT COPY AND PASTE into these fields</u>. There are security features that prevent that feature from allowing you to login.
- If you have disabled the ability to click on links in your email, you can click the following link or copy and paste the link into your browser:
  - https://social.webcomserver.com/wpm/mt/bcbskc/

Forgotten Password:

If you have forgotten your password, please click the link in the lower right "Forgot Password" (as illustrated in the previous screenshot). This will take you to the following screen:

Here you will enter your username (usually your email address) and the email address where you want to receive the reset link. Once you have entered the data, click the blue box: "Request Password" button, causing a password reset email to be sent.
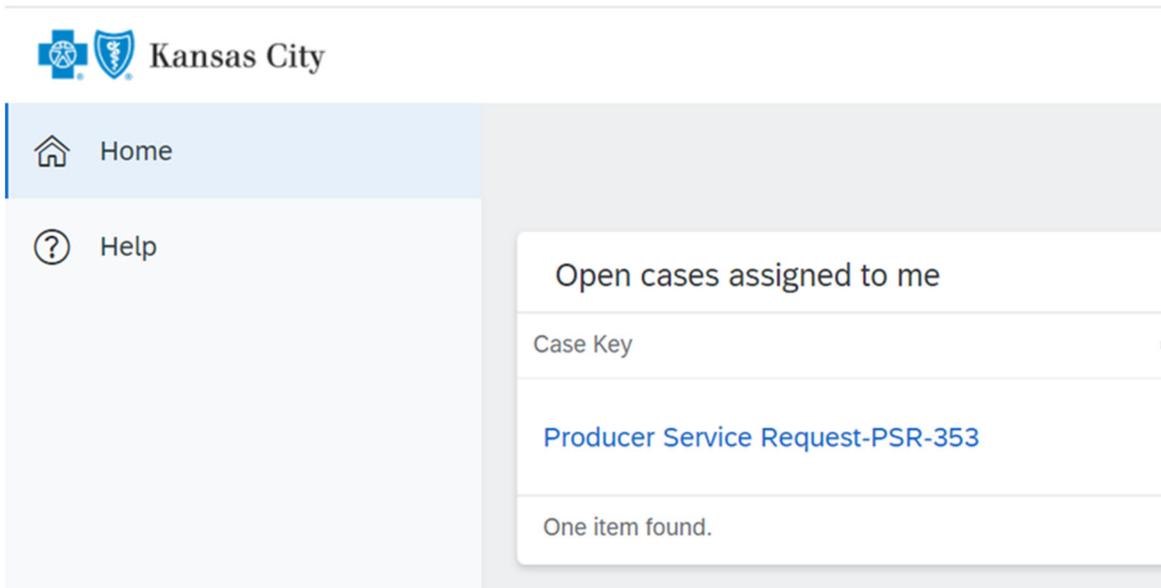
Note:
- Be sure to check your spam or junk folder, email systems often put password reset emails in these folders.

Navigation in the System:

After you have logged in, you will be presented with the "Open cases assigned to me".

It is possible that you will have more than one case assigned to you; for example, if you are also the principal of an agency and you use the same email for both.

Click on the "Producer Service Request-PSR-xxx"

Congratulations, you can now access the system and can begin completing recertification!

Completing the Recertification:

The below sections illustrate the various tabs that you must review and update to successfully complete and submit your recertification.

Note:
- On any given tab, at the top of your screen there are two buttons:
  - "Save" Button - This allows you to save your work, logoff, and later resume where you left off.
  - "Submit" Button - This fully submits your application to Blue KC. **ONLY click this AFTER all tabs are completed.**
    - **Important Note: Blue KC will NOT receive your recertification if the "Submit" button is not hit upon completion of the recertification**

Click the button below to save your progress, if you do not click SAVE your information will not be saved to the case.   Once you have FINISHED updating all of your information, please click the button below.

              [Save]   [Submit]

1. **General Tab**
   - Within this tab you will presented with information to verify or correct, then click "Next". Illustration below:
     - **Note**: You must input an answer for "Does your Upline information look correct?"

2. E&O Tab

- This tab will populate with the current E&O data that Blue KC has on file, make any needed changes, and then click "Next". Illustration below:
    - If you want to change your current E&O data, click "Yes", and follow the additional steps.
        1. **Note**: If E&O data is updated then a copy of your E&O (at least the disclosure page) must be uploaded into the system
        2. **Note**: The Per Occurrence Limit and Aggregate Limit both must be at least 1,000,000
    - If your current E&O data is correct click "Next" at the bottom of the screen.

To upload a copy of your E&O follow these steps: 1. Click within the blank E&O box 2. Navigate to your wherever you saved your copy of your E&O, 3. Click the Open Icon

3. **Banking Tab**
   - Within this tab banking information is updated. Input, update, and review your banking information for all applicable lines of business aW-9 and then click "Next" when finished. Illustration below:
       - **Note:** For agents under LOAs, where your Upline Agency determines pay, nothing is needed here so you can just click "Next".

4. Certifications Tab

- This tab will populate with the certification data Blue KC has on file, review and update where needed. Illustrations below:

Kansas City

Please complete your AHIP Certification prior to starting your Recertification Case.

Please complete the application below. You may click "Save" at any time to save the application and log back in later. Once the application is completed, click "Submit". If you did not complete a tab, the word "Incomplete" in red will display.

Click the button below to save your progress, if you do not click SAVE your information will not be saved to the case.

Once you have FINISHED updating all of your information, please click the button below.

Save

Submit

General	E&O Certificate	Banking Information	Certifications	Education	eSignature

Please complete your AHIP Certification prior to starting your Recertification Case.

Please update or add your required Certifications (i.e. AHIP, ACA).

Do you wish to update any information on this tab? ☑ Yes

Link to AHIP Certification www.ahip.com

Is your AHIP Certification complete? * ☑ Yes

Do you authorize Blue KC to pull your AHIP data? * ● Yes ○ No

AHIP Training Year 2022

AHIP ID * [_____]
[required]

AHIP Score 100.00

AHIP Completion Date 05/24/2021

We found your AHIP Certification, please provide your AHIP User ID.

Do you wish to sell individual products on The Federally Facilitated Marketplace (FFM)/ACA? This requires you to complete an annual FFM Certification. * ○ Yes ● No

◀ Previous   Next ▶

Use the Next/Previous buttons above to easily move between tabs.

Please update or add your required Certifications (i.e. AHIP, ACA).

Do you wish to update any information on this tab? ☑ Yes

AHIP Certificate * [_____] ↑ ✕

AHIP Year * ○ 2020 ○ 2021

◀ Previous   Next ▶

Note: If you have commercial, you can enter your FFM certification OR opt out:

Do you wish to update any information on this tab? ☑ Yes

AHIP Certificate * [   ] ↑ ✕   AHIP Year * ○ 2020
                                                                      ○ 2021

Do you wish to sell individual products on The Federally Facilitated Marketplace (FFM)/ACA? This requires you to complete an annual FFM Certification. *   ◉ Yes   ○ No

FFM Certification * [   ] ↑ ✕   FFM Year * ○ 2020
                                                                     ○ 2021

5. Education Tab
- This tab will load into another system where you will complete a 10-question exam. Illustration screenshots below:
    - **Note:** You will get **3 attempts to pass** the exam with a **score of 85% or higher**.

    When you first log in a system message will popup; simply click "Continue to my dashboard"

General	E&O Certificate	Banking Information	Certifications	Education	eSignature

Please complete all training courses below.
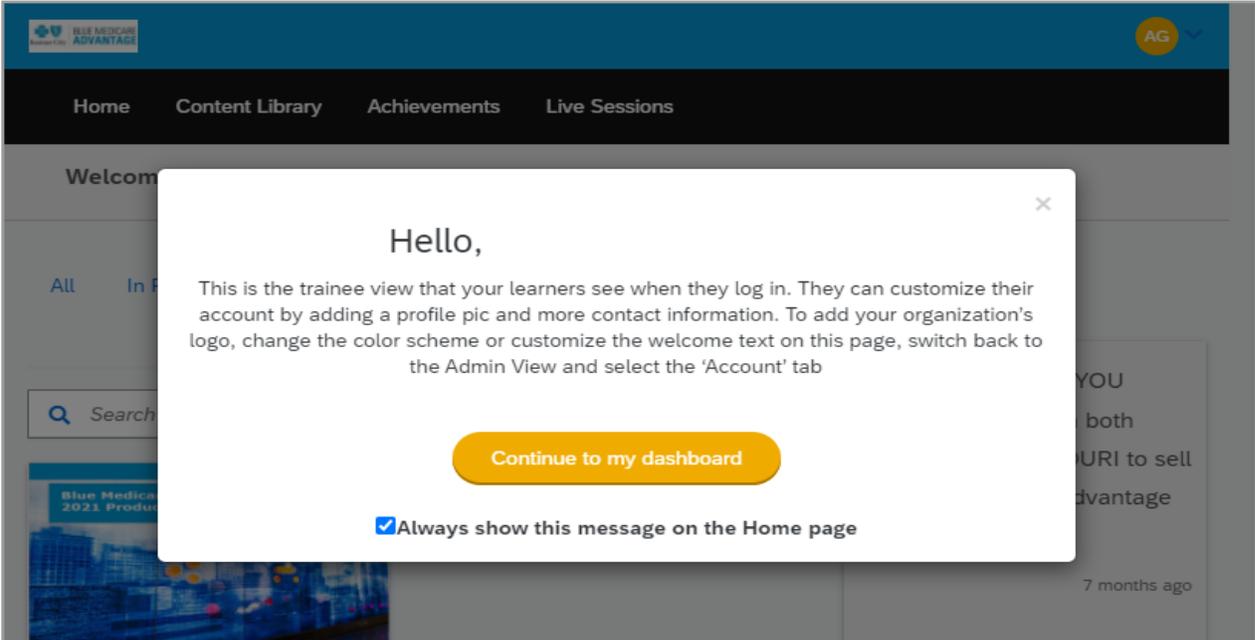
BLUE MEDICARE ADVANTAGE   AG ⌄

Home   Content Library   Achievements   Live Sessions

Welcom...

All   In F...

Hello,   ✕

This is the trainee view that your learners see when they log in. They can customize their account by adding a profile pic and more contact information. To add your organization's logo, change the color scheme or customize the welcome text on this page, switch back to the Admin View and select the 'Account' tab

Continue to my dashboard

☑ Always show this message on the Home page

YOU
both
URI to sell
dvantage

7 months ago

Click the 2022 Blue KC MA Training icon below. After you view the training guide, you will see the Exam!

Click "Start this course"

Once inside, click the yellow "NEXT" on the upper right to start your exam.

Go through each question, selecting the bubble next to whichever answer you believe is correct and then clicking "Next Question"
   After you answered all the questions, you will be brought to a page where you can review your answers.
   1. If you would like to change your answer for any given question, click the "Change this answer" under the question
   2. Scroll to the bottom of the questions/answers list and click on "COMPLETE" to submit your answers for grading.

After receiving a passing grade, click "Continue" at the bottom of the page

You will be taken to another page to verify that you have passed the test, from here click "Next" at the bottom of the page

6. **eSignature Tab**
   - This tab will allow you to electronically sign certifying that you are who you are, that you have completed the work, etc. You will have to type / sign your name and information multiple times throughout the document before you are finished.
     - **Note:** This process is done through Adobe Sign, so you might be prompted to update your browser to become compatible with the software. You might have to click the blue button "Load Documents" for them to appear.

1. *This tells you how many more signature fields are found within the document.*
2. *If you click "Next", then it will take you to the next signature field or required input within the document.*
3. *By clicking within the signature field, your established signature will be input.*
   - *The first time you click within the signature field, you will receive a prompt asking you to create a digital signature (for its simplicity we recommend the "Type" option, but feel free to use whatever option you desire).*
       - *Signature Options:*
           - *You will have the option of typing it out*
           - *Drawing it with your mouse*
           - *Uploading a scanned image of your actual signature*
           - *Syncing with a mobile device to create a signature)*
   - *Once you are done creating your signature click "Apply"*
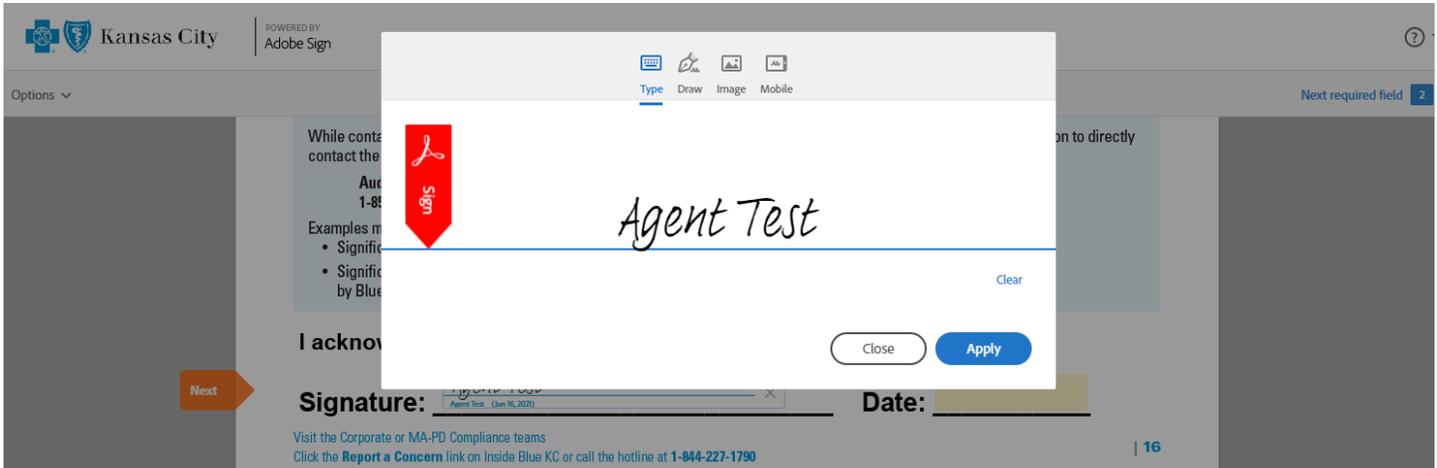
4. *These are Abode shortcut icons to perform various tasks (from left to right: page up, page down, X current page / total pages, zoom in, zoom out, & download)*

Once you have signed & completed all the required fields you will be able to "Click to Sign", finalizing that document.

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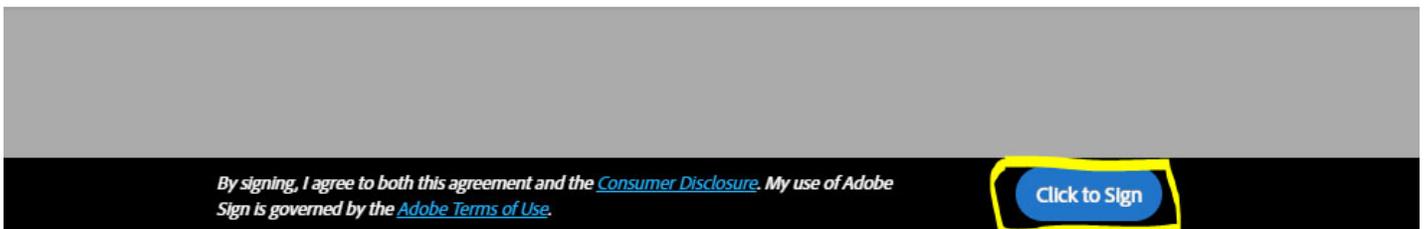
When the document is complete you will receive a confirmation message like the below:
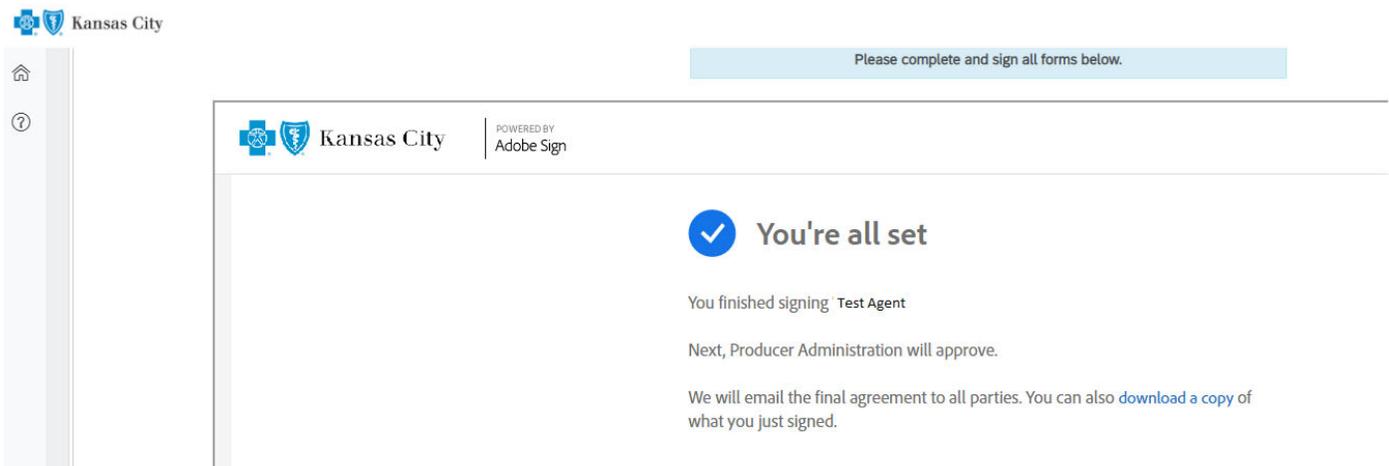
Repeat the previous process if you have any additional document, otherwise return to a previous tab, or proceed to the next step.

7. **"Submit" Button**
   - When you have completed all relevant information and no longer see "*Incomplete*" next to any tab, click the "Submit" button, near the top of the page.

   Once you have FINISHED updating all of your information, please click the button below.

   Submit

   - If everything was performed correctly, you will see the below message:

   Your changes have been submitted for review. Expect an email from Blue KC within 2 business days. Click the Blue KC logo in the upper left to exit.

   At this point you are free to logout, close your browser, etc.

   Thank you!