FMO Agent Contracting and Onboarding Guide

Florida Blue MEDICARE
Your local Blue Cross Blue Shield

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Welcome to Florida Blue Medicare

- This Agent Onboarding guide was developed to assist the Field Marketing Organization (FMO) agent with successfully completing the agent contracting, agent onboarding, registering for Florida Blue's Self-Service portal, AgentPoint and completing required CMS Medicare Training processes.

- Once all steps are successfully completed, the FMO agent will be Ready To Sell (RTS) and will receive a RTS Email!

- Note: only an authorized Agency Owner or Tier III Delegate will have access to submit agent appointments

Invite to Onboard:
FMO Appointment Form &
Agent Agreement

Step1:

• Once the Agency Owner or Tier III delegate submits the agent appointment request in the online portal-AgentPoint, the agent will receive an email invitation from Florida Blue Medicare(FBM) ChannelPartnerManagementTeam@bcbsfl.com

• The email will contain a link (Appointment Application) which will navigate the agent to complete the FMO Agent Agreement & Appointment form.

• Subject line of the email:

Agent Appointment Form & Requirements

You are receiving this email because an agent appointment(s) request has been received.

Agent Contact

Agency Contact
FMO Agency
Agency of Record code{5-digit Agency Code]

To access the necessary appointment forms please click on the link below and complete all requirements.

In order to complete this form, you will need to know your license number, National Producer Number (NPN) and your Errors & Omissions Summary (in some cases). If you do not know your NPN, you can click here to locate: click here.

Appointment Application.

Please note, your appointment(s) will not be completed without successful submission of all requirements.
Your internal reference number (Tracking Record) is: 999999

Florida Blue, Health Options, Inc., Florida Blue Medicare, Inc., Florida Combined Life Insurance Company, Inc. and Truli for Health are Independent Licensees of the Blue Cross and Blue Shield Association.

Completing the FMO Appointment Form & Agent Agreement

Complete the Agent Overview section

Completing the FMO Appointment Form & Agent Agreement

- Next the agent will complete the Details screen

- The agent must enter the Errors & Omissions (E&O) details.

- Licenses and License Types details- if the agent does not know these details, it can be obtained by accessing the Department of Financial Services (FLDFS) Licensee search website at: https://licenseesearch.fldfs.com/

See page 7 for screenshot of DFS system

Completing the FMO Appointment Form & Agent Agreement- FLDFS Website

- FLDFS Licensee Search Page

- For best search results, the agent should enter their license number in the FL License# Field.

- If the agent does not know their license number; the agent can search by other attributes listed on the screen.

Completing the FMO Appointment Form & Agent Agreement

- "Details" section continued.

- The agent can upload a screenshot of the license information found on the FLDFS website; however, it is not required.

- Complete the last question on the Detail page and select "Next"

Completing the FMO Appointment Form & Agent Agreement

- The agent will then be directed to the W9 screen. All information provided must match the information from the Office of Insurance Regulation (OIR) database.

- Information provided on the Overview screen should correspond with the W9 form

  - Box #1- the agents First and Last Name will
  - Box #3- Individual/Sole Proprietor or single-member LLC
  - Box #5- agent address from the Overview screen
  - Box #6- City, State, and Zip Code
  - Part I- agent Social Security Number

** Note Agents associated with a Lump Sum FMO agency are not required to upload a W9 nor will they be presented with the W9 requirements during the completion of the appointment application.

Completing the FMO Appointment Form & Agent Agreement

- Next the agent will Review and Sign the Agent Agreement

- The agent will be presented with the Agent Agreement to review and sign via an Adobe DocuSign process. The Adobe will guide the agent through the process and point out the fields that requires completion/signature

- The following pages within the Agent Agreement requires the agent's signature:

1.) FMO Agent Agreement

2.) First Tier Entity Attestation

3.) Agent Telemarketing Attestation

4.) FMO Agent Agreement Signature Page

Completing the FMO Appointment Form & Agent Agreement

https://agentpoint-stg&bcbsfl.com/apss/ps/prospect/agent-appointment-access/adobe-redirect

Document Signed

You have signed the document you can close this tab and return to continue filling the online form

- Once the Agent Agreement is signed, the agent will receive a confirmation of completion. The agent can then close the tab and will be redirected to the online form for completion.

Completing the FMO Appointment Form & Agent Agreement

- Agents W9 must be named ,saved and entitled "W9" to successfully upload the document.

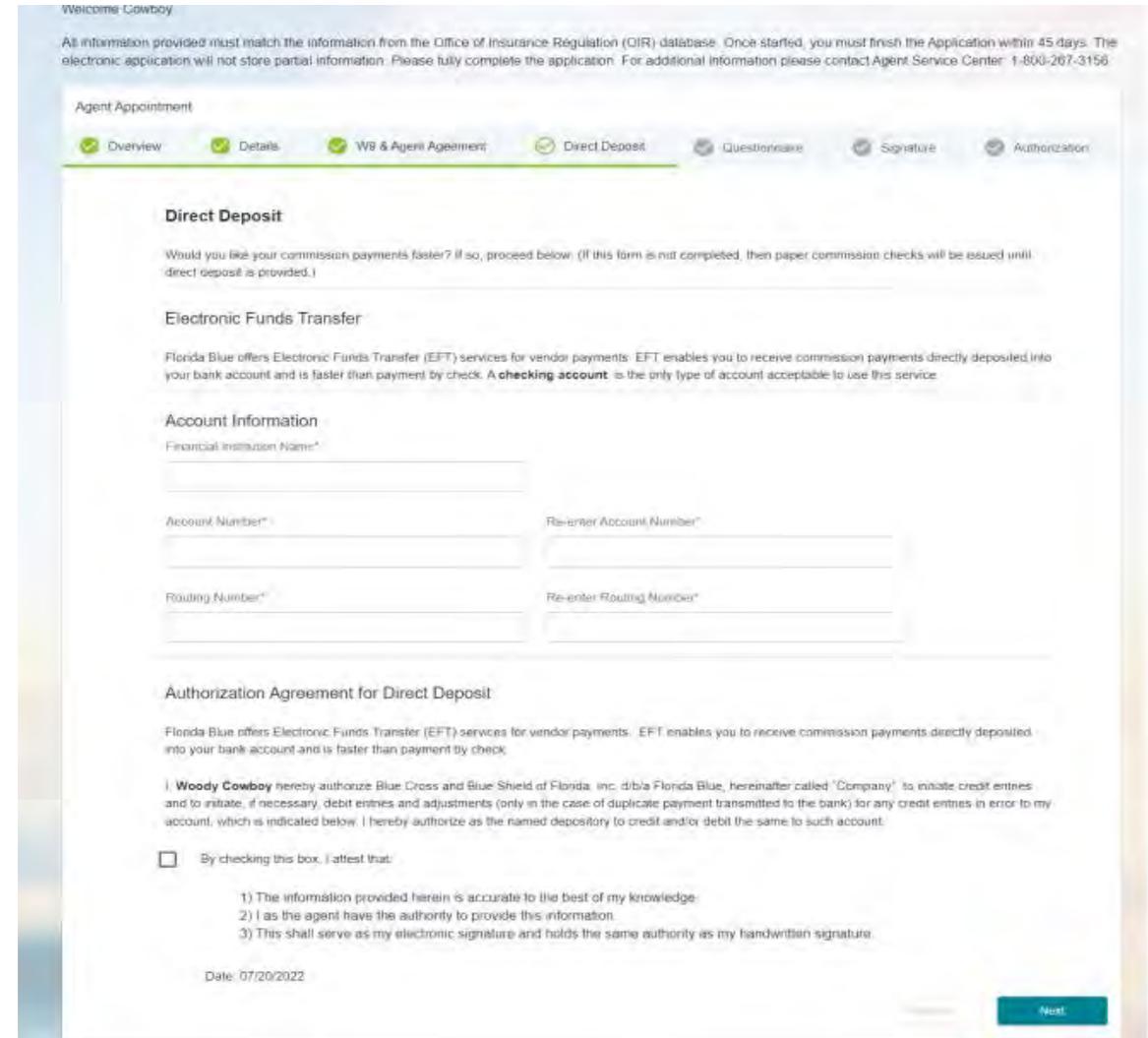- The "W9" must be the agents W9. Agency W9 are not accepted and cannot be process.

** Note Agents associated with a Lump Sum FMO agency are not required to upload a W9 nor will they be presented with the W9 requirements during the completion of the appointment application.

Add Attachments

Upload Documents
or drop documents
File type can be: pdf, tiff, doc, docx, xls, xlsx
File size must be less than 25 MB

Attachments

W9 Wood Cowboy.pdf   76 75 KB   Uploaded Successfully

Please Upload W-9 Documents

Previous   Next

Completing the FMO Appointment Form & Agent Agreement

- If the agent would like commissions deposited into a Direct Deposit account, the agent must complete/enter all applicable fields marked with an (*) on the Direct Deposit screen.

Don't have Direct Deposit Information? Not a problem, once appointed, the agent will have the ability to log into their online portal set up their Direct Deposit account. If no Direct Deposit is set up, the agent will receive commissions via a paper check.

Completing the FMO Appointment Form & Agent Agreement

Completing the agent Questionnaire

The agent is required to all questions before proceeding to the next screen.

Completing the FMO Appointment Form & Agent Agreement

- The agent must sign the appointment form

- The agent must enter their full name and the current date is pre-populated.

Completing the FMO Appointment Form & Agent Agreement

- The final step is authorizing and signing the background consent. All agents are required to complete and pass a background screening upon initial enrollment and subsequently every 2 years upon appointment renewal.

- The agent must enter their full name and the date is pre-populated with the current date

- The Agent Appointment Form and Agent Agreement is now complete, and the agent will receive a confirmation.

 The onboarding process will now begin!
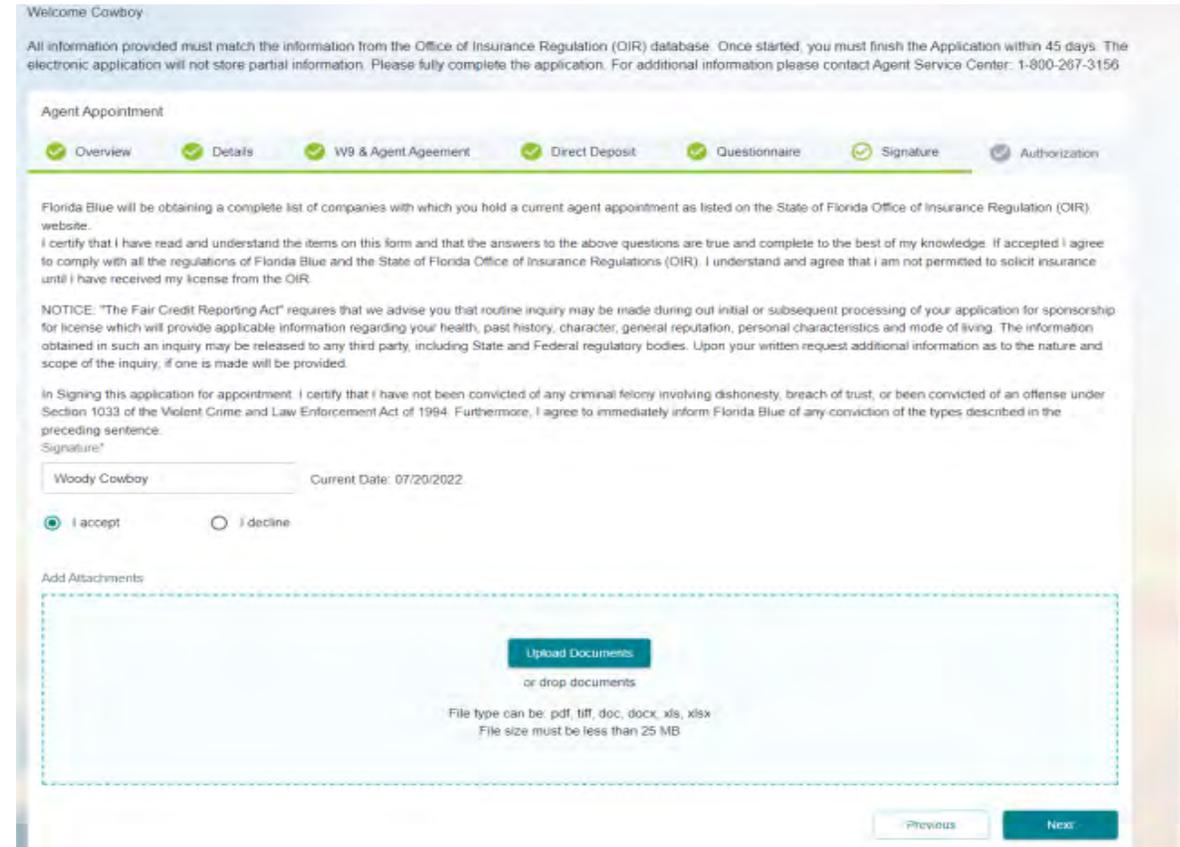
Onboard – Agent Activation

Step 2:

• Once the Agent Agreement and the Appointment forms are successfully submitted, the agent onboarding process begins!

• This process can take 5-10 business days which includes, validating the completed Agent Agreement, Agent Appointment form, validating the agents license with FLDFS, initiating and completing the background screening process.
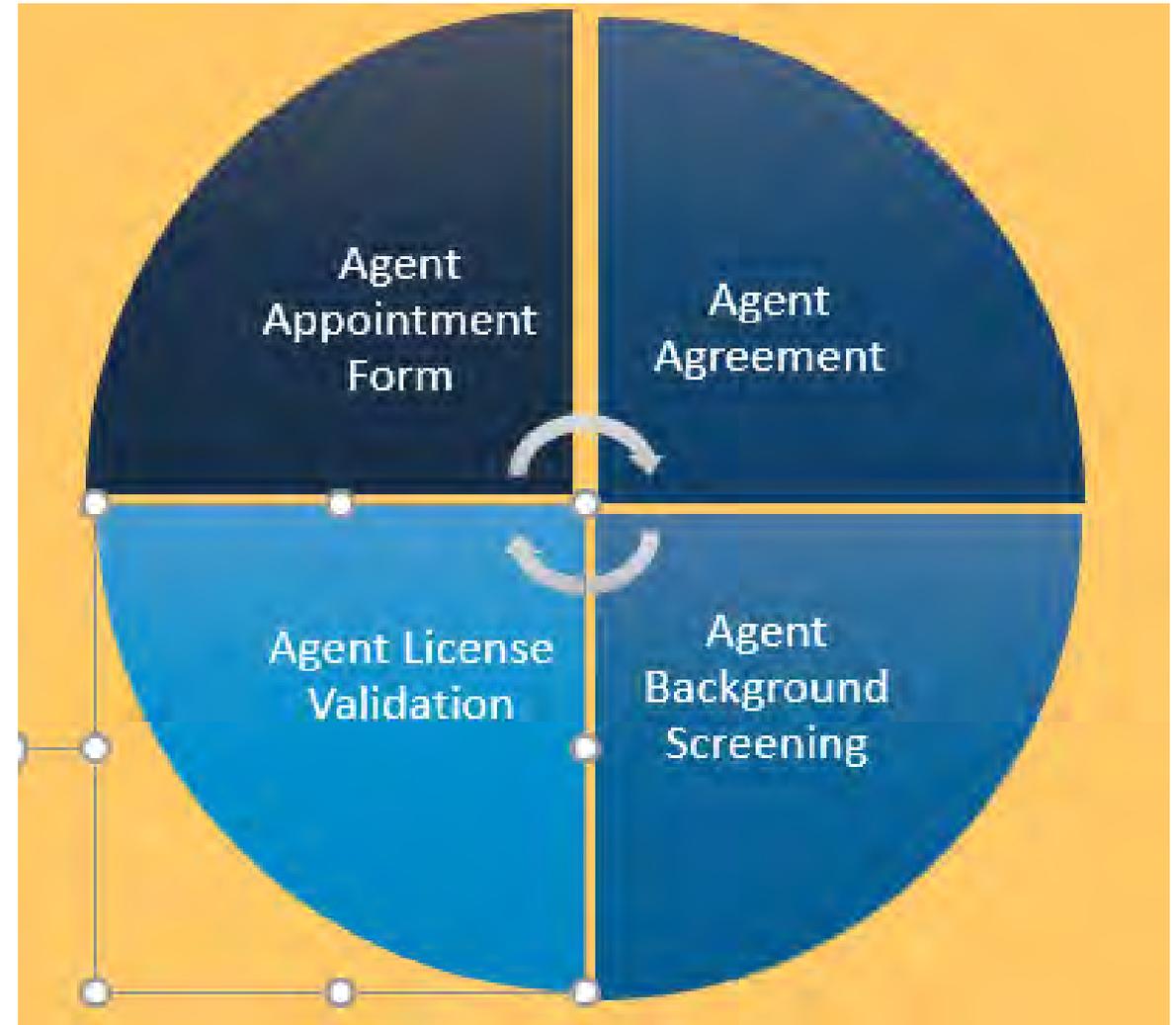
Onboard – Agent Activation

- A background check will be ordered which can take up to 3-5 business days or more depending on the county or counties that the agent currently or previously resided in.

- Once the agents license is deemed valid and the background screening is completed/ approved, the agent will then be appointed with FLDFS. The agent will also be activated within Florida Blue's internal systems

- **Note: The Agency Owner or Tier III delegate can check the status of the agent onboarding process by logging into AgentPoint using their login credentials.**

Background Check Process

Onboard – Agent Activation

Once the agent is appointed with FLDFS and activated within Florida Blue's internal systems, the agent will receive a "Welcome Email." The email will be immediately sent to the agents email address that was provided on the agent appointment form.

The subject of the email will read as: **Florida Blue Medicare Contracting**

Note: The Welcome Email is not a Ready to Sell Notification.   It is sent to notify the agent that they are now appointed with FLDFS and activated in Florida Blue internal systems. The FMO agent will be RTS once all Medicare training has been completed.

From: Channel Partner Management Team (donotreply@bcbsfl.com)

Sent: (Date)

To: (Agent's email address)

Cc: agency email address and the CGA appointments mailbox (Only CGAs & MAAs)

Subject: Agent Appointment Confirmation (Agent's first name and last name)

Dear (first name) (last name):

Congratulations! Your requested appointment(s) have been completed effective (Start date).

Your Agent of Record number(s) is ___-___. (comma separated, if there are multiple AORs, with a period at the end - include/exclude this sentence based on scenario matrix)

Onboard –
Agent Activation

The Welcome Email will include some of the following attributes:
- Effective date of the Agent appointment
- FMO Agents unique 7-digit Florida Blue Medicare Agent of Record number
- How to Register for AgentPoint
- How to complete required CMS Medicare training
- And More!

It is now time for the Agent to register for their convenient online portal. See the next few slides that will provide an overview of Florida Blue's online agent self-service tool, AgentPoint.

From: Channel Partner Management Team (donotreply@bcbsfl.com)

Sent: (Date)

To: (Agent's email address)

Cc: agency email address and the CGA appointments mailbox (Only CGAs & MAAs)

Subject: Agent Appointment Confirmation (Agent's first name and last name)
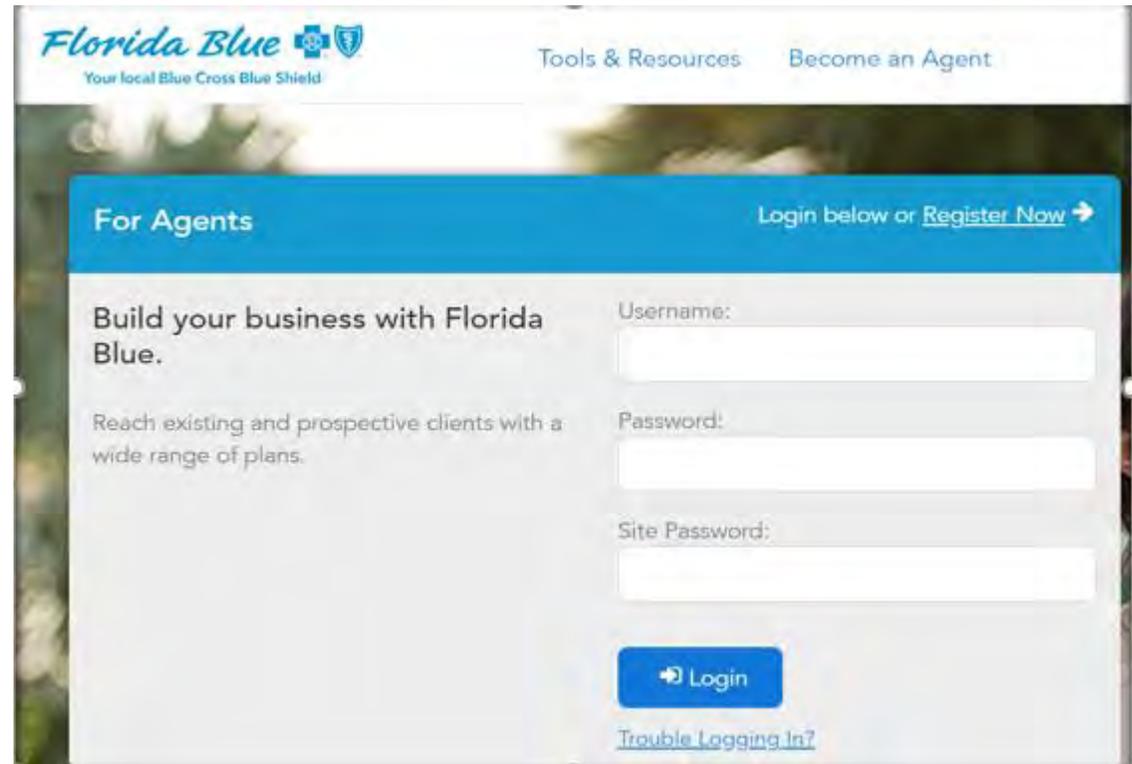
Dear (first name) (last name):

Congratulations! Your requested appointment(s) have been completed effective (Start date).

Your Agent of Record number(s) is ___-___. (comma separated, if there are multiple AORs, with a period at the end - Include/exclude this sentence based on scenario matrix)

What is Agent Point?

AgentPoint is Florida Blue's online Agency and Agent information management and Self-Service portal. It was designed to meet the needs of our business partners by offering quick and intuitive access to tools, resources and insights that help the agencies and agents manage their business and achieve success.

Within this portal the agent will have access to update the agents' demographics, ability to view and manage current book of business, access commission statements and much more!
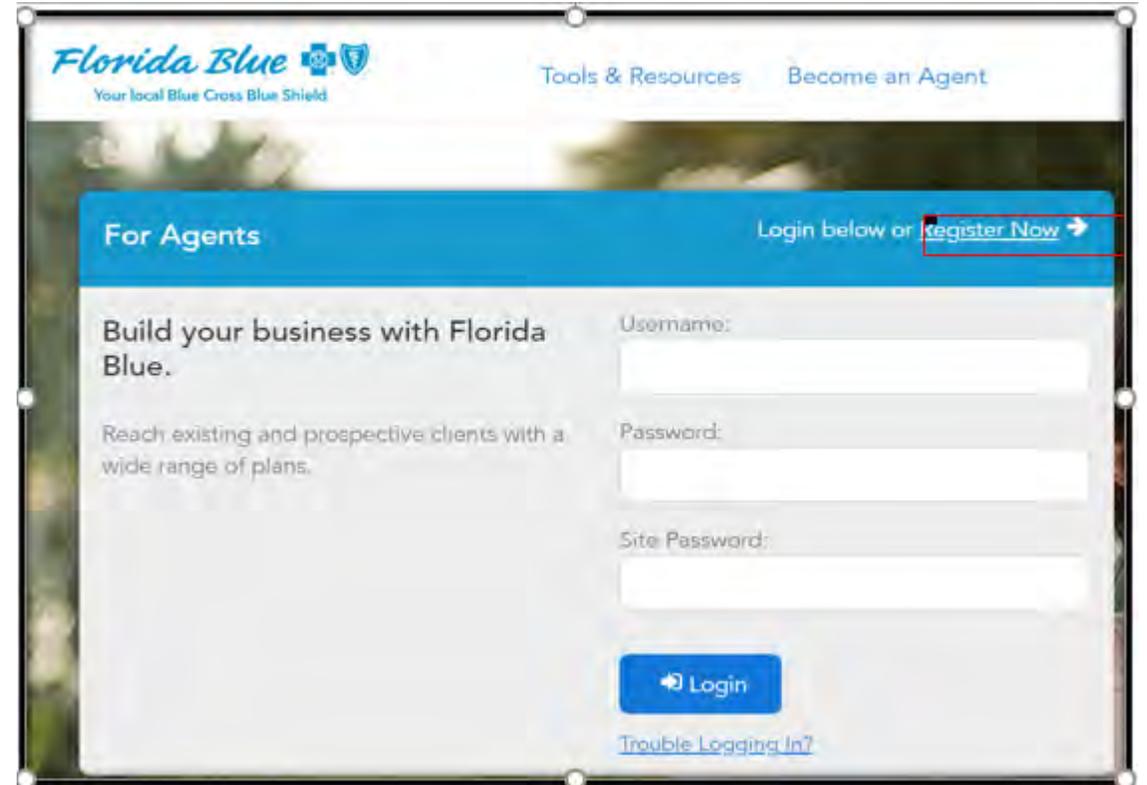
How to register for Agent Point

Step 3:
Instructions on how to register for Agent Point can also be found in the agents "Welcome Email"

The website to register for Agent Point is www.FloridaBlue.com. The agent will land on the "For Agents" login page and must select the "Register Now" link or select the following link and choose "Agent" from the drop-down feature

https://registration.bcbsfl.com/ecir/public/AgentNewUserRegistration.do

Registering for Agent Point

- Enter required details exactly how it was submitted on the agent appointment form.   Enter the last 4 digits of the SSN, First name, Last name, Date of Birth and Zip Code.

- Complete the "I'm not a robot" reCaptcha and select the "Next" button.

- If you receive an error, please make sure the data is entered exactly how it was entered on the agent appointment form.

- If you continue to receive an error while attempting to register, please contact the **Agent Service Center (ASC) at 1-800-267-3156.**
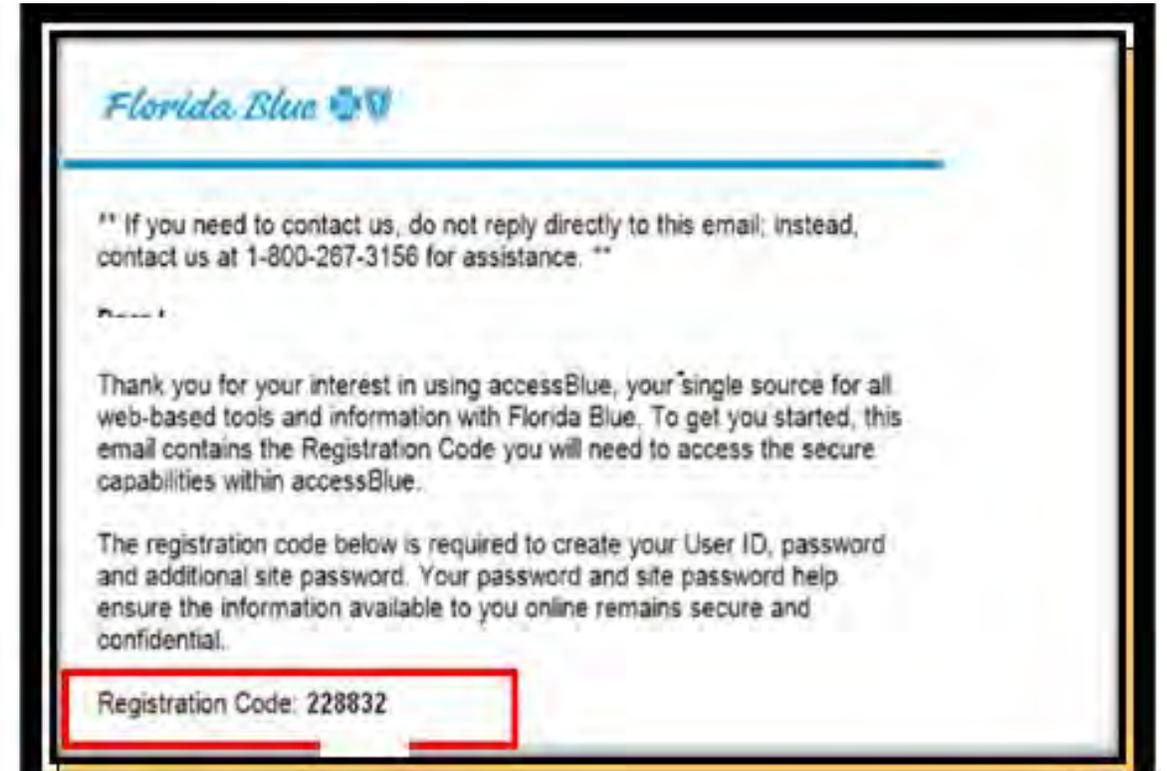
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Registering for Agent Point

- Select "Click here to receive a Registration Code" button.

- The page will refresh to indicate that the email was sent.

- **Note: the Registration Code is not the same as the agents 7-digit agent of record code**
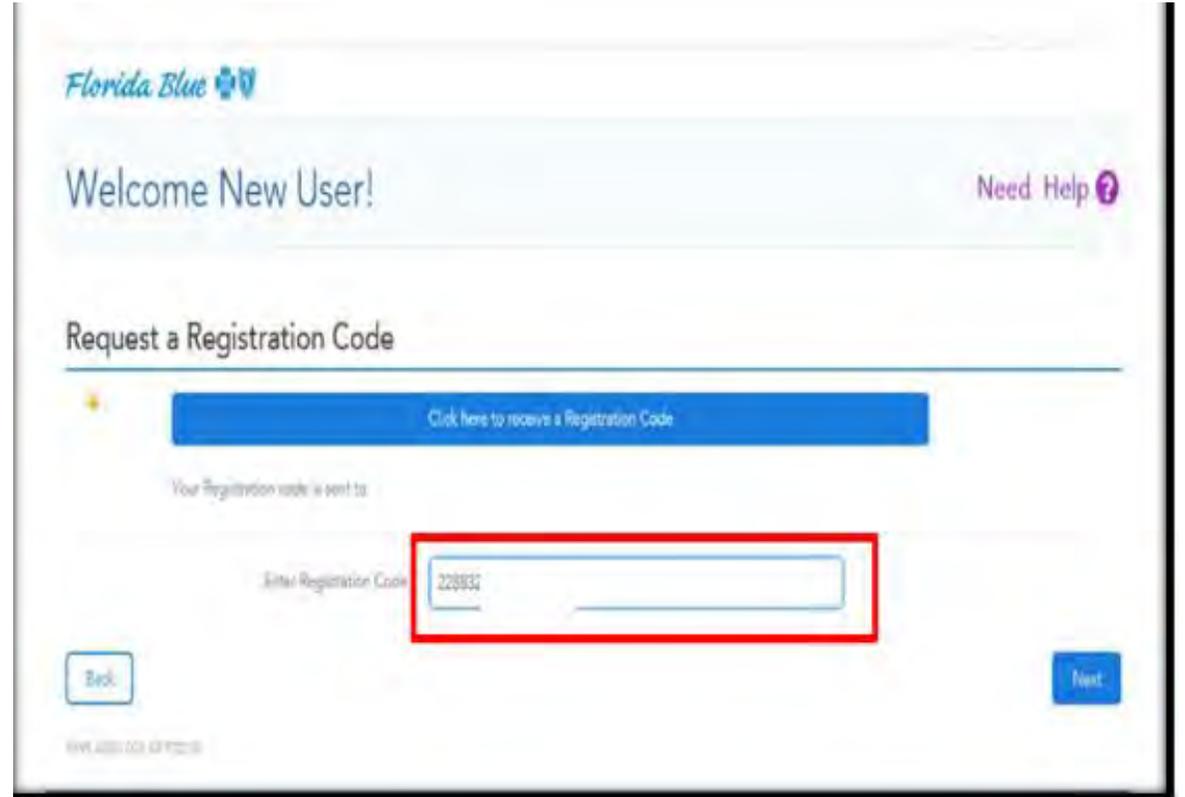
Registering for Agent Point

- An email will be sent to the agent's email address which contains the registration code. The email subject will be: **Florida Blue Registration Code for Self-Service Tools**
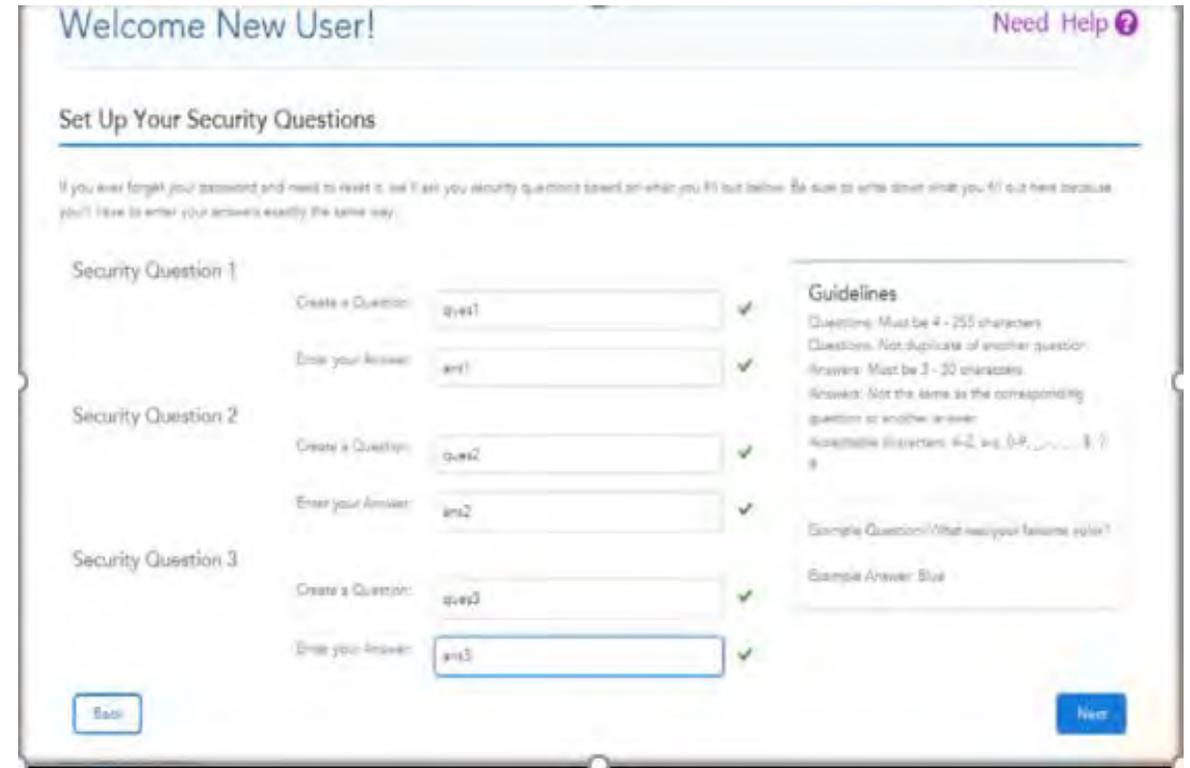
- **Note: Do Not Respond to this email**

Florida Blue

** If you need to contact us, do not reply directly to this email; instead, contact us at 1-800-267-3156 for assistance. **

Thank you for your interest in using accessBlue, your single source for all web-based tools and information with Florida Blue. To get you started, this email contains the Registration Code you will need to access the secure capabilities within accessBlue.

The registration code below is required to create your User ID, password and additional site password. Your password and site password help ensure the information available to you online remains secure and confidential.

Registration Code: 228832

Registering for Agent Point

• Return to the registration page and enter the registration code in the text box and then select "Next"

• Create a new User Id, Password,

• re-enter the Password and select "Next"

• Create a Site Password, re-enter the Site Password for confirmation and select "Next"

Registering for Agent Point

- Create three Security Questions, provide the answers

Registering for Agent Point

- After successful registration, the confirmation page will display.

- The agent's user id is also displayed.

- Select "Continue" to be redirected to AgentPoint.
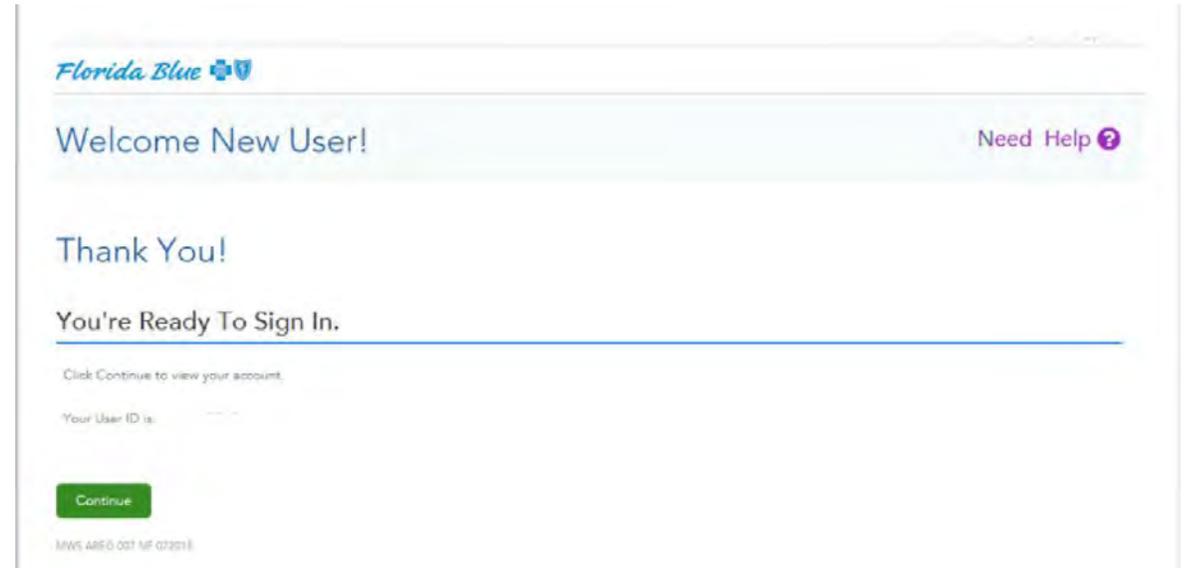
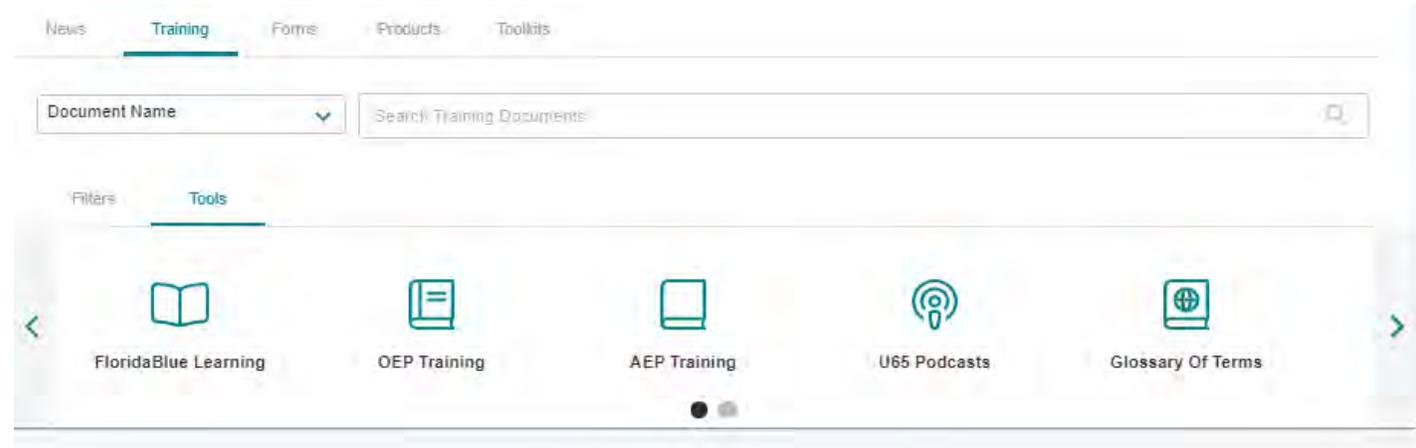# Completing CMS Medicare Certifications

Step 4:

- Once the agent has successfully registered for AgentPoint, the agent is now ready to log in and complete all required CMS Medicare training.

- From the Agent Point Landing Page, select the "Education" icon

- **Note: Annual CMS Medicare Training is required.**
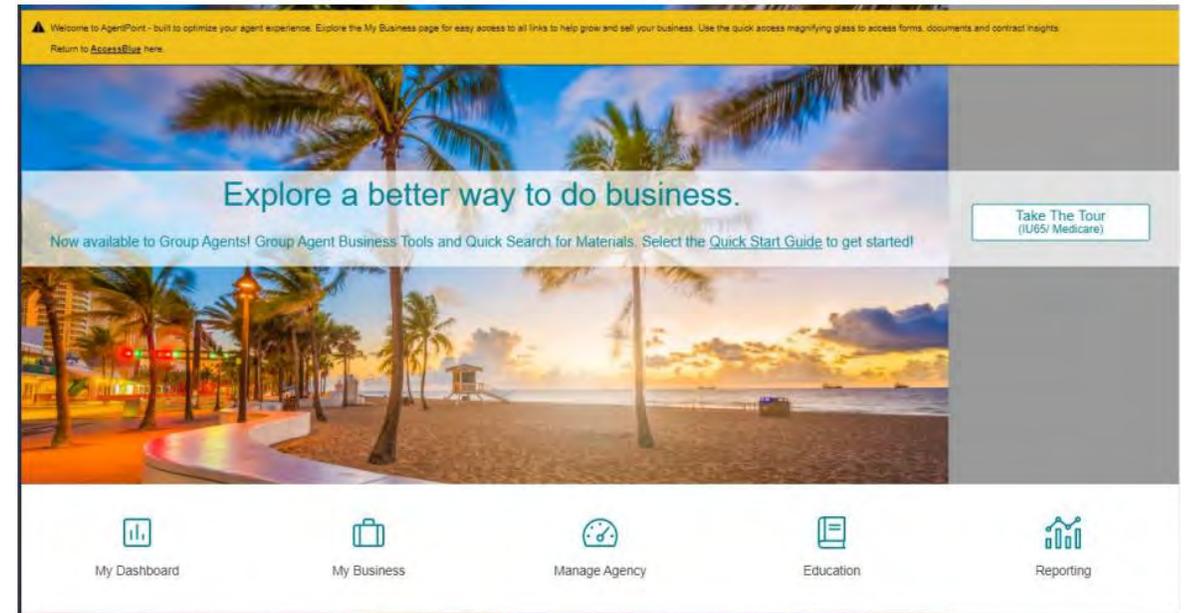
Completing Medicare Certifications

- Select "Training" and then select "Tools" and then select FloridaBlue Learning on the bottom left side of the screen

Completing Medicare Certifications

- From the Welcome Page, click the "Self" icon in the top left corner

Completing Medicare Certifications

- Select "Learning" from the pull-down menu

Completing Medicare Certifications

- If required, the next slides will walk you through registering for the Medicare CORE curriculum. Select "Required Training"
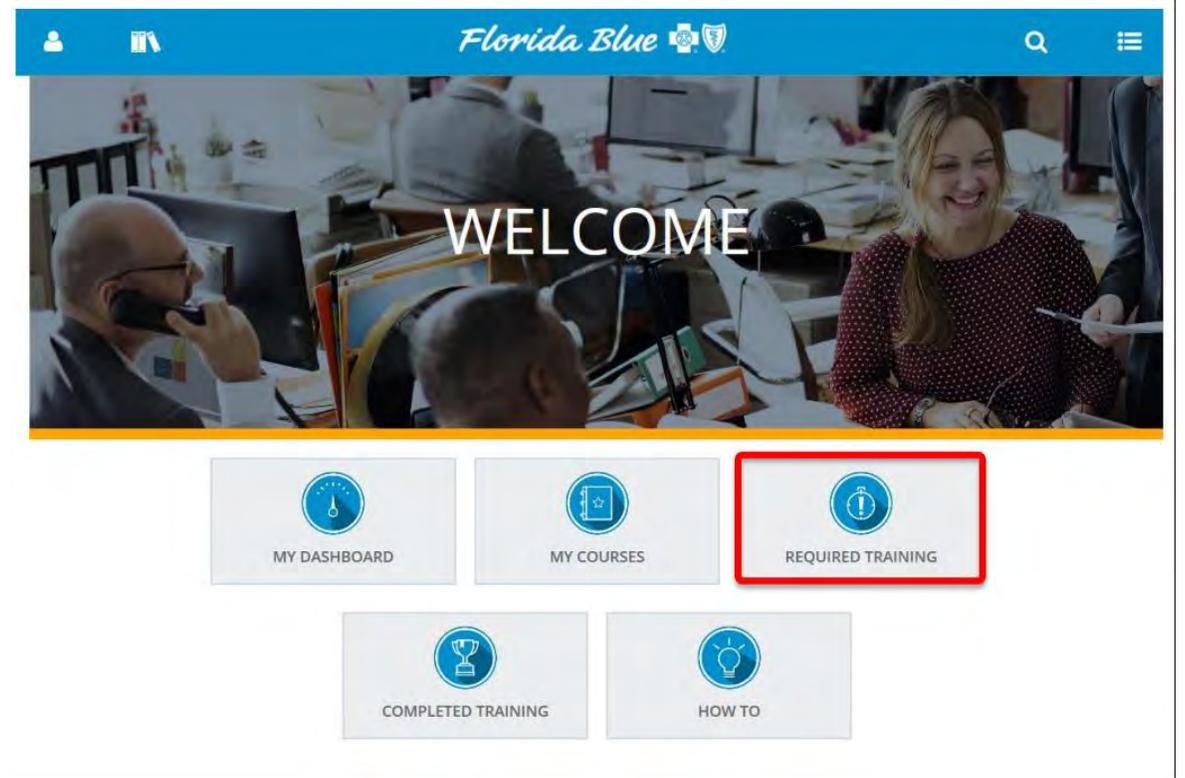
Completing Medicare Certifications

- Click the curriculum registration button to the left of the curriculum title to register for the curriculum.

- **Note: The year, course and module titles are for instructional purposes only.**

Completing Medicare Certifications

• Once successfully registered, click the "Start" button to the right of the course title and the course will open
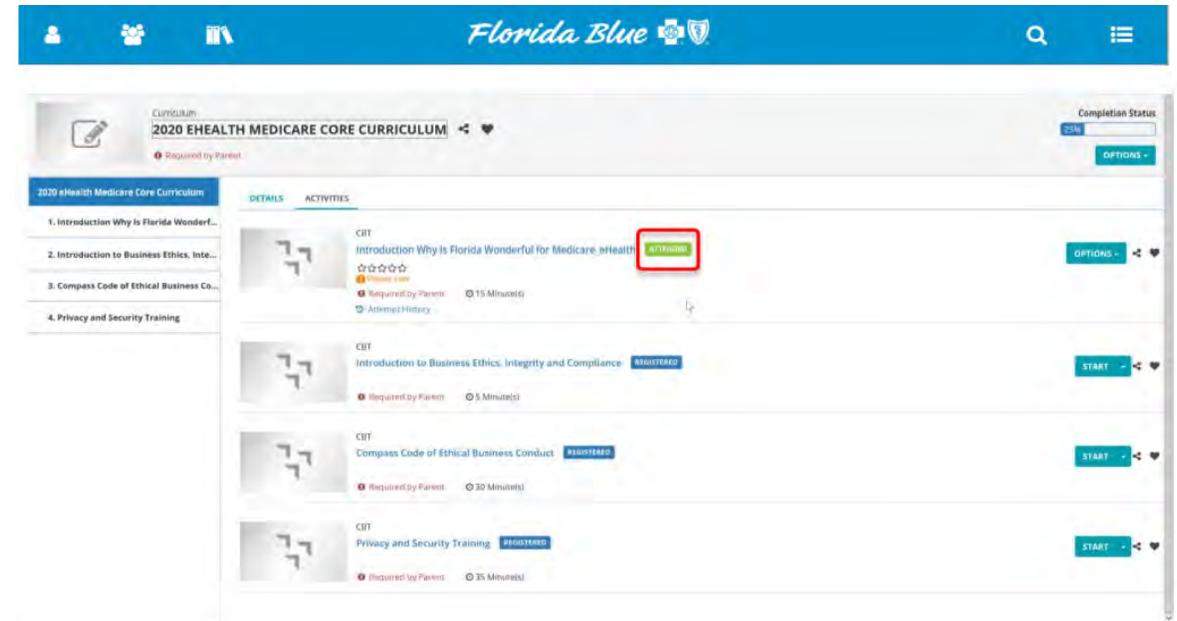
Completing Medicare Certifications

- Once the course is completed, close the course window as instructed. The system will automatically recognize completion of the course and will display the "Topic Status" as "Completed". Click "OK" to return to the curriculum.

- **Note: If the agent does not see "Completed", the course is not complete.**

- **The agent must disable the pop-up blocker and restart the course to complete.**

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Completing Medicare Certifications

- When the agent returns to the curriculum, the "Attended" course indicator will indicate the course was completed.
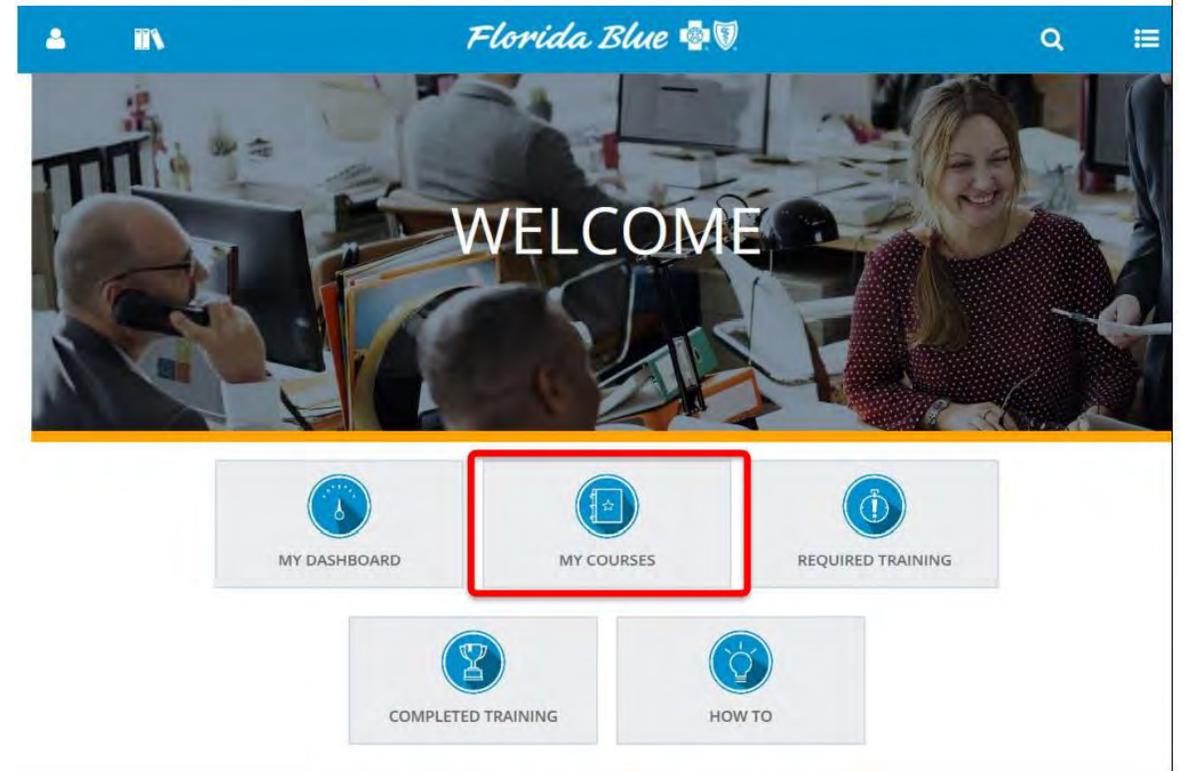
Completing Medicare Certifications

- To begin the next course, click the start button to the right of the course title.

- The agent must complete all steps until the curriculum is completed.

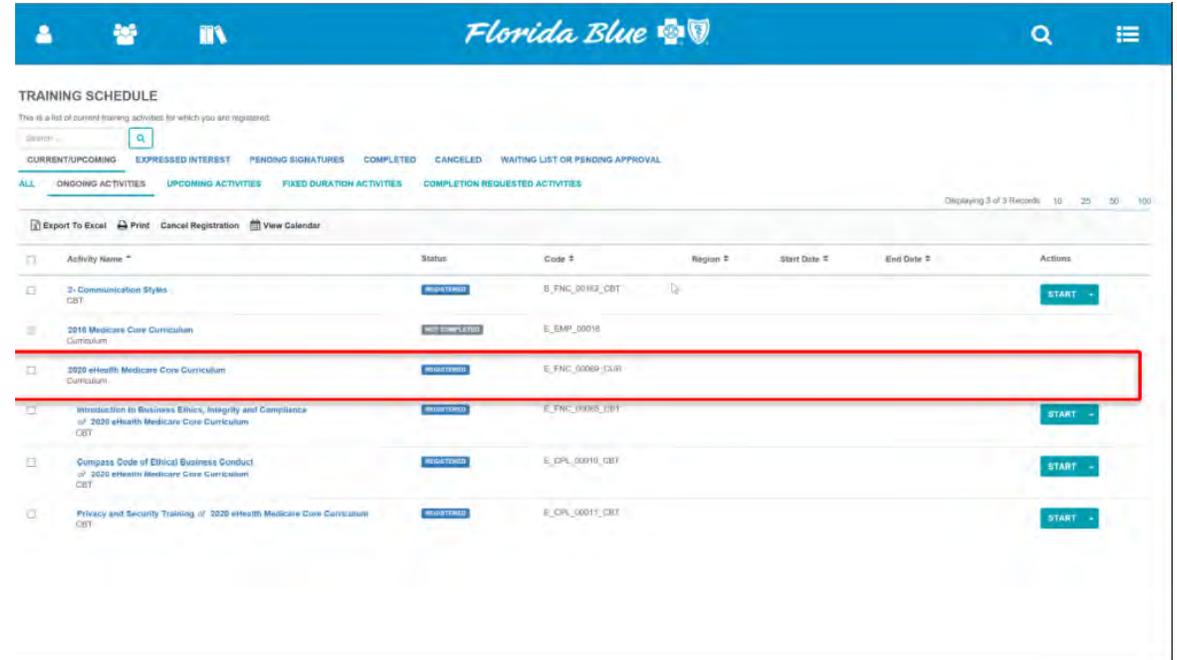- **Note: the modules and courses must be completed in sequential order.**

Completing Medicare Certifications

- If for any reason the agent needs to exit out of or close the training session, then return to it at later time, follow these steps.

- The agent must log back in Florida Blue Learning. Once on the Home page, click the "My Courses" button

Completing Medicare Certifications

- The Training Schedule page is displayed. The agent must click the title of the curriculum they want to continue.

Completing Medicare Certifications

- To begin the next course, click the start button to the right of the course title.

- **Note: the modules must be completed in sequential order.**
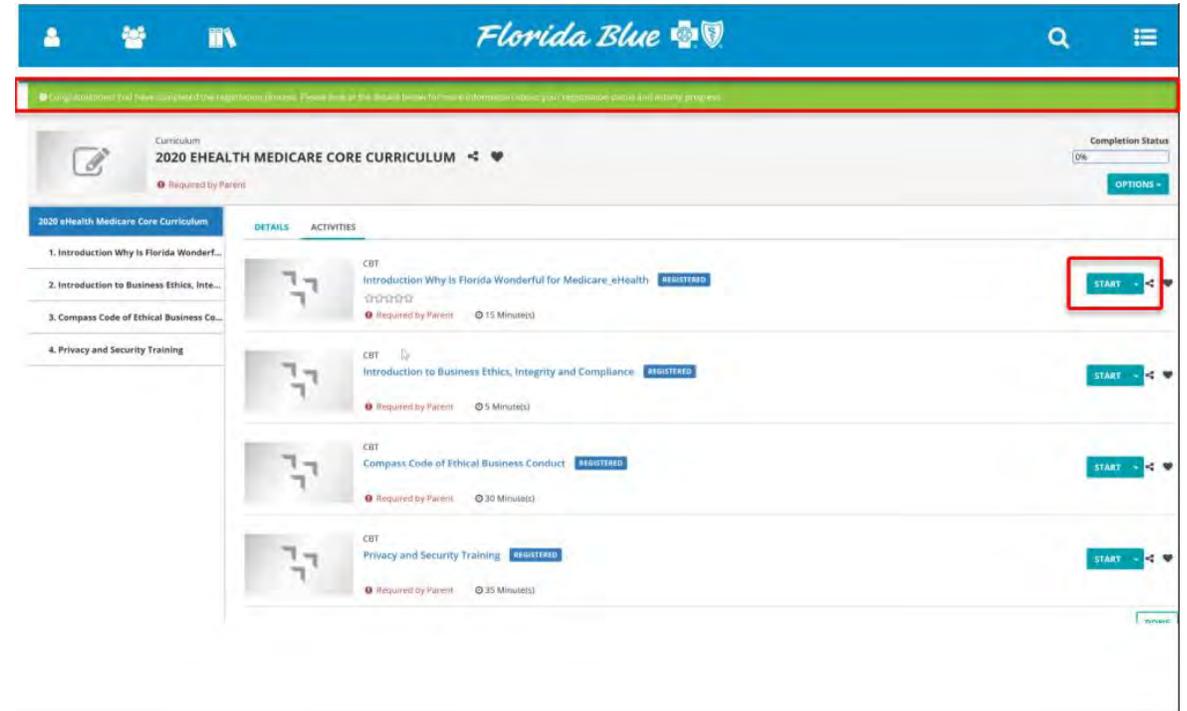
Completing Medicare Certifications

- If the agent experiences any registration issues, follow these steps:

- After clicking the registration button, if the agent has already attended any of the training in this curriculum, the agent may receive this window. The agent will just click the submit button to complete the registration.

Completing Medicare Certifications

- Congratulations! The agent has completed the registration process.

- Upon successful completion of Agent Point registration and all required Medicare Certifications, the agent will be ready to sell (RTS).

M E D I C A R E

Completing Medicare Certifications

- The agent will also receive a "RTS" alert email.

From: Channel Partner Management Team <ChannelPartnerManagementTeam@bcbsfl.com>
Sent: Wednesday, June 22, 2022 2:43 PM
To: <Agency and Agents email here >
Subject: -Congratulations! You are Ready to Sell for Florida Blue Medicare CESAR HIDALGO

Dear {Agent Name}:

Congratulations! You are Ready to Sell for Florida Blue Medicare [effective date].
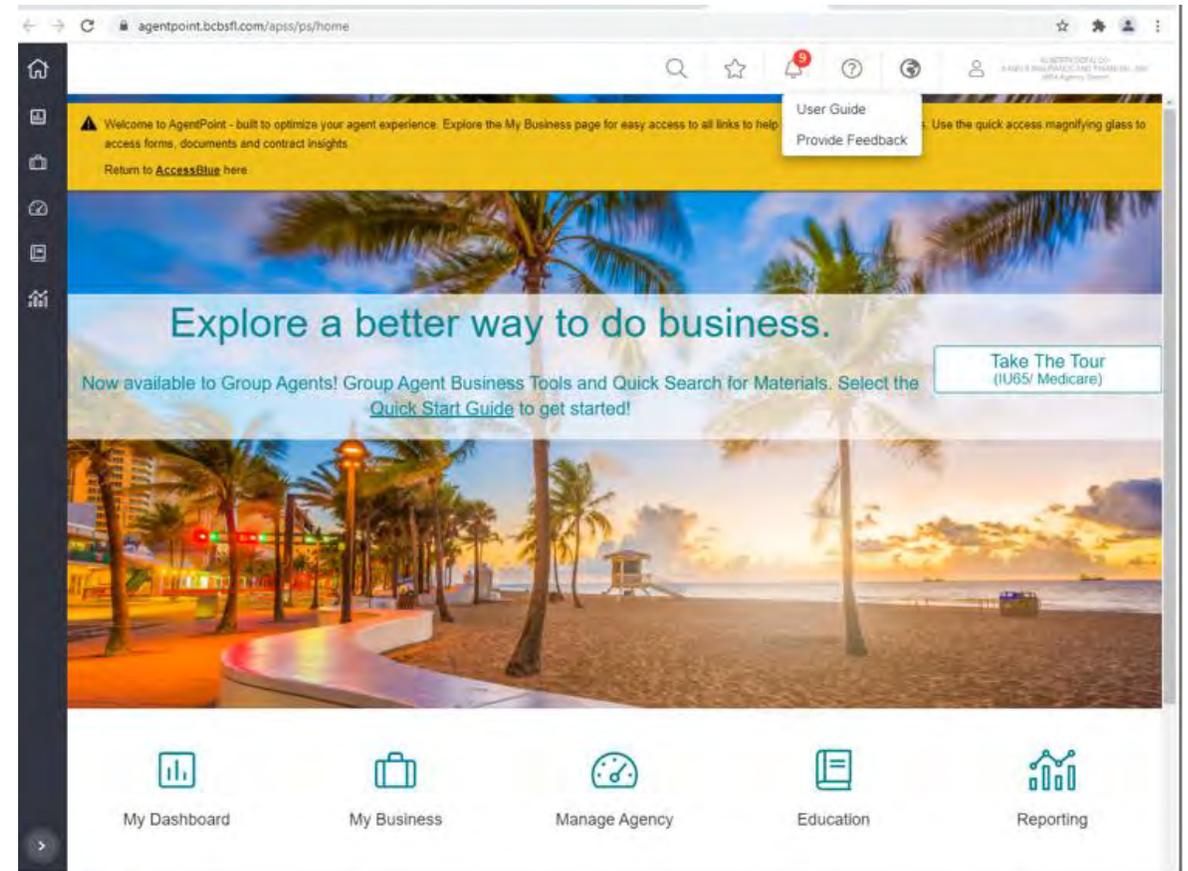
Your Agent of Record number(s) is [7-digit AOR number].

Florida Blue

Florida Blue Medicare, Inc.

Additional Resources

To access a complete User Guide of AgentPoint, from the landing page, click on the (?) tab on the top right of the screen and select User Guide. This will direct the user to the AgentPoint External User Guide

If you have technical difficulties or have questions regarding registration, the application process, onboarding status, setting up the EFT account, etc., please contact our Agent Service Center (ASC) at 1-800-267-3156 or your local Broker Manager.

Thank You!