



**READY
TO HELP**



Individual Agent Support Request Job Aid

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File Formats

OneSource can accept the following file formats for upload:

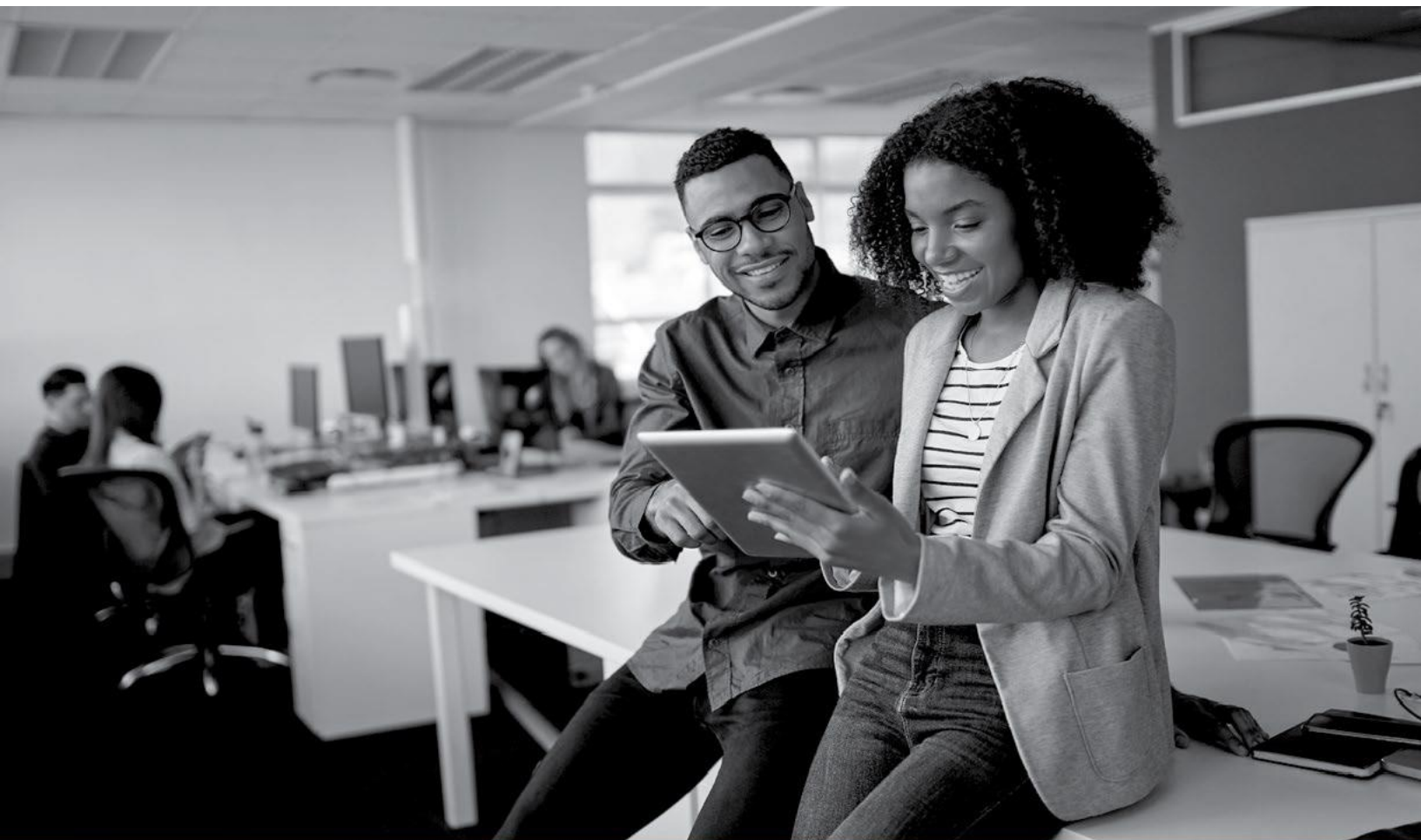
.doc; .docx; .jpeg; .jpg; .msg; .pdf; .png; .tif; .tiff; .xls; .xlsx; .ppt; .pptx

Attaching Files

Once a support request has been submitted, you cannot attach a file from the support request screen. If you do not have all of the required documentation when you create the support request, click the 'Save for Later' button.

File Size Limitation

File size limitations are 2GB for chatter and 25MB for Support Requests.




Agent Administrative Support Request

For requests that were previously submitted to agentcontracts@bcbsm.com, you will now submit Support Requests through Agent Portal.

First you will need to log in to the [Agent Portal](#). If you have not signed up for the new Agent Portal, please contact your Sales Consultant for next steps.

Launching a Request

- 1. If you have active Individual U65 and/or MA business, you will navigate to the Individual Dashboard in Agent Portal to launch your agent support requests.



HOME

GROUP

INDIVIDUAL

SEARCH

Agent Name

Dashboard

Tools

Products

Quote & Enroll

Service

Quick Links

Dashboard

Welcome to your Blues dashboard where you can get real time updates on cases, accurate insight into your book of business, and quick links to commonly requested reports.

- 2. You will find a new section called Summary of Your Agent Administration Support Requests. In this view you will see a list of your recently submitted support requests. At the bottom of the view, Click the **Create a New Agent Support Request** button, this will launch a new window to create and submit your support request.

Summary of Your Agent Administration Support Requests

REQUESTS CLOSED IN THE LAST 7 DAYS

OF OPEN REQUESTS

0

1

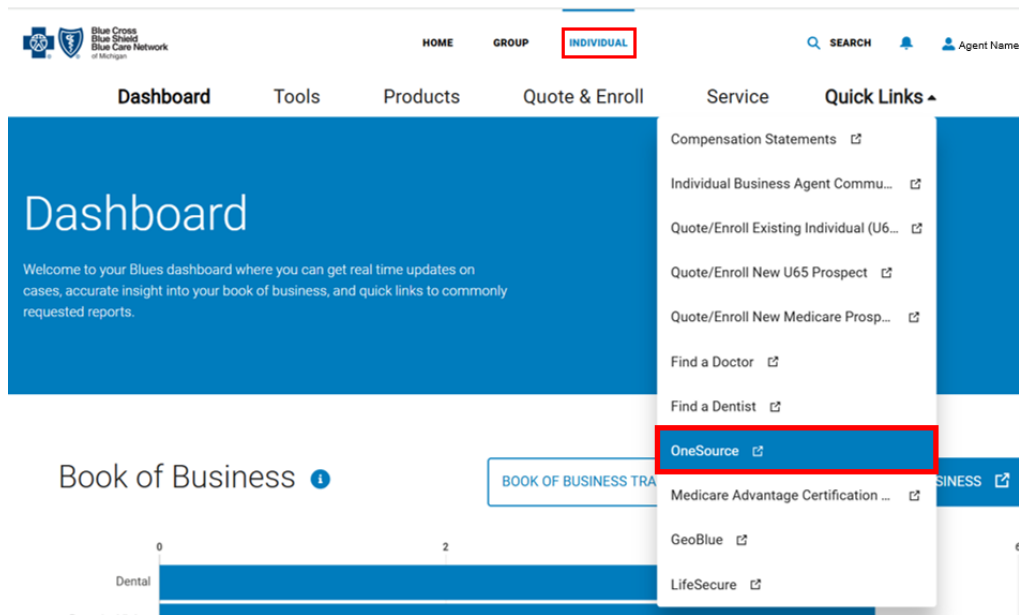
For most support requests for an agent, such as re-assignment, updating banking information, resolving errors, processing name changes, or handling terminations.

Request No.	Submitted By	Subject	Request Type	Status	Opened Date
1 01044185	Agent Name	Agent Name Cha...	Agent Name Cha...	Submitted	01/13/2025

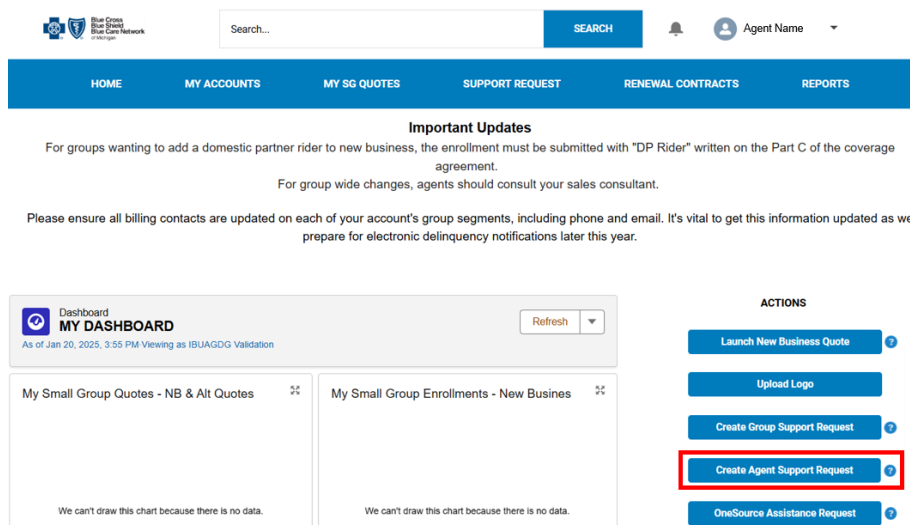
VIEW ALL AGENT SUPPORT REQUESTS

CREATE A NEW AGENT SUPPORT REQUEST

3. Alternatively, if you do not have active Individual U65 and/or MA business, you will navigate to the **Quick Links** and select **OneSource** to launch the agent support requests.



4. From the OneSource homepage, you will select **Create Agent Support Request**.



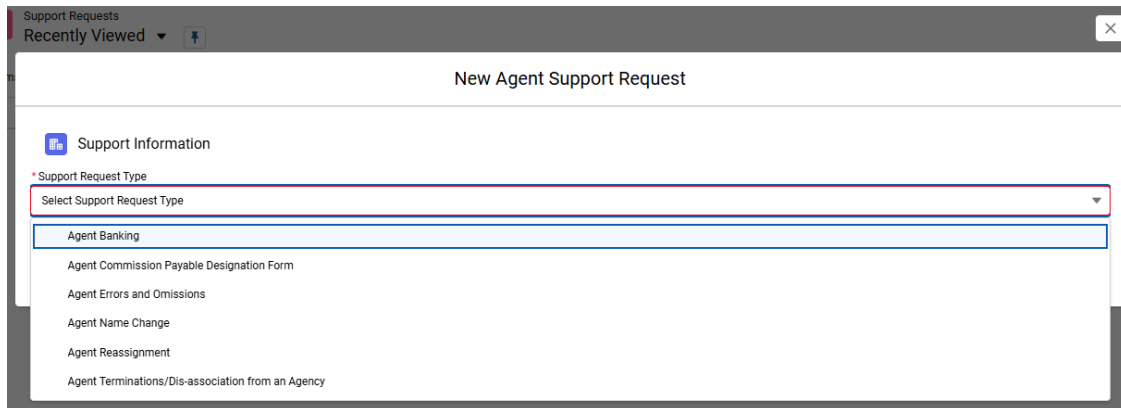
5. Select the line of business that you would like to submit the support request for: Group, Individual, or Both.

Note: Agent Banking and CPD change requests will automatically apply to both.

The form is titled 'Is this support request for group, individual or both?'. It has three radio button options: 'Group', 'Individual' (selected and highlighted with a red box), and 'Both'. At the bottom right, there are 'Cancel' and 'Confirm' buttons.

Submitting a Request

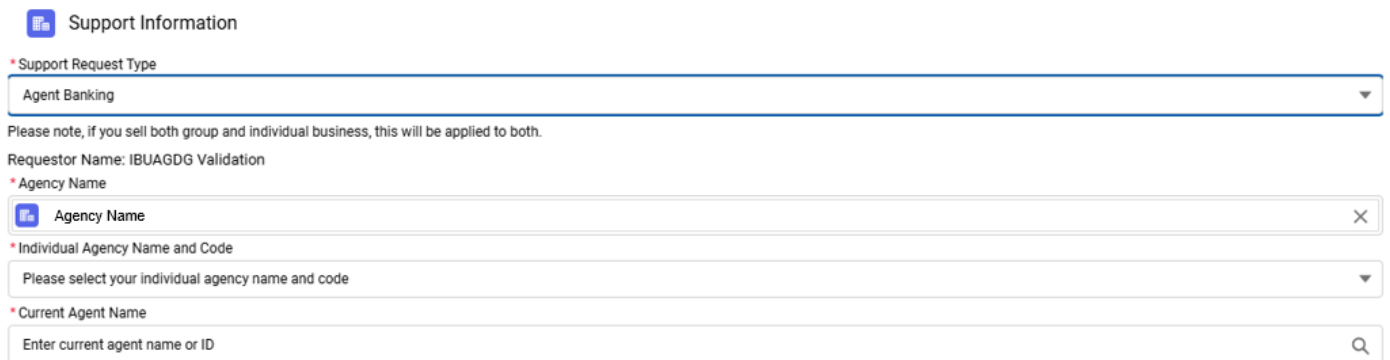
1. Once the new window has launched, you will select the type of support request that you would like to submit.



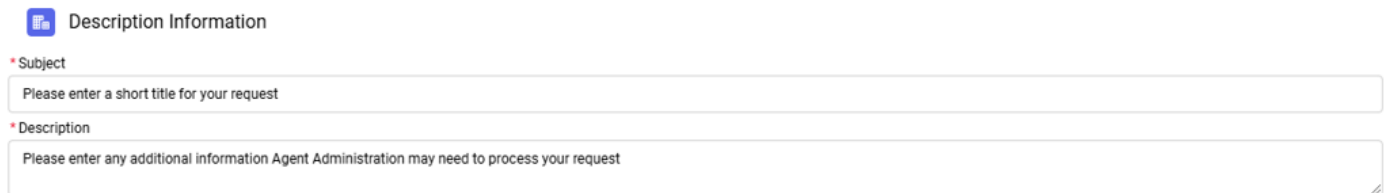
The screenshot shows a window titled "Support Requests" with a "Recently Viewed" dropdown and a "New Agent Support Request" form. The "Support Information" section is active, showing a dropdown menu for "Support Request Type" with options: Agent Banking, Agent Commission Payable Designation Form, Agent Errors and Omissions, Agent Name Change, Agent Reassignment, and Agent Terminations/Dis-association from an Agency.

2. Each support request will have fields that will need to be filled out for that type of request. Please fill that out with all required information, indicated with an asterisk. An example of Agent Banking is shown below. Once complete, select **Submit Support Request**.


New Agent Support Request



The screenshot shows the "New Agent Support Request" form. The "Support Information" section is active, showing a dropdown menu for "Support Request Type" with "Agent Banking" selected. Below this, there is a note: "Please note, if you sell both group and individual business, this will be applied to both." The "Requestor Name" is "IBUAGDG Validation". The "Agency Name" field is required and has a dropdown menu. The "Individual Agency Name and Code" field is required and has a dropdown menu. The "Current Agent Name" field is required and has a search icon.




The screenshot shows the "Description Information" section of the form. The "Subject" field is required and has a placeholder text: "Please enter a short title for your request". The "Description" field is required and has a placeholder text: "Please enter any additional information Agent Administration may need to process your request".

 Please attach a [W-9, ACH form](#) and a voided check. If you do not have a voided check, a separate document such as a supplier invoice with banking information or a signed supplier letterhead with banking information must be provided as a validation of the banking information as listed.
*If coming from an agency, documents must be signed by the DLRP Owner.

[Attach Files](#) [Submit Support Request](#) [Save For Later](#) [Cancel](#)



Note: if there are any required documents to accompany the request, they will be linked at the bottom of the request indicated below by the **star**. Please fill those out and attach to the support request using the **Attach Files** button before submitting. Once a support request has been submitted, you cannot attach a file from the support request screen. If you do not have all of the required documentation when you create the support request, click **Save for Later**.

3. Once the request has been submitted, you will be brought to a view to see all of your support requests. You can select the Support Number to review requests or if you have subsequent requests, you can select **Create Agent Support Request** at the top right of the screen.




Search...

SEARCH

 Agent Name

HOMEMY ACCOUNTSMY SG QUOTESSUPPORT REQUESTRENEWAL CONTRACTSREPORTS

Create Group Support RequestCreate Agent Support Request

 Support Requests
Recently Viewed

1 Item • Updated a few seconds ago

Search this list...

	Support N...	Support...	Channel	Account Name	Subject	Support Request Ty...	ASR	Opened D...	Status
1	01044185		Agent	Agency Name	Agent Name Change Request	Agent Name Change		1/13/2025	Submitted

4. Additional ways to launch support requests:
- While all types of support requests can be launched from the above process, there are additional ways to launch directly into the support request type you are looking for.
- Book of Business Transfer:** From the Individual Dashboard, select **Book of Business Transfer**.

Book of Business

BOOK OF BUSINESS TRANSFER

VIEW ENTIRE BOOK OF BUSINESS


0246

Dental

Dental + Vision



Medical

- Agent Name Change:** Navigate to the **My Profile and Settings** page and select the option for **Support Request** in my information.



HOMEGROUPINDIVIDUAL

SEARCH

 Agent Name

My Profile and Settings

My Profile and Settings

User Administration

Log Out

My ProfilePassword and SecurityTool AccessBook of Business Delegation

My Information

Edit

If you need to edit the following information: First Name, Middle Name, Last Name, please submit a **Support Request**.

First NameMiddle NameLast Name

Email AddressPhone NumberMobile Number (Optional)

- **Agent Banking, Agent Commission Payable Designation Form, and Agent Errors and Omissions:** Also from the **My Profile and Settings** page, scroll down to find Agency Information where you can submit **Agent Banking, Agent Commission Payable Designation Form, and Agent Errors and Omissions** requests.

Agency Information

Submit a support request if you need to update the following: **Agent Banking, Agent Commission Payable Designation Form, and Agent Errors and Omissions**

Individual Agency Information

Agency Code

Agency Name

Medicare Agency Information

Agency Code

Agency Name

Group Agency Information **IF APPLICABLE**

Agency Code

Agency Name

Agency Type

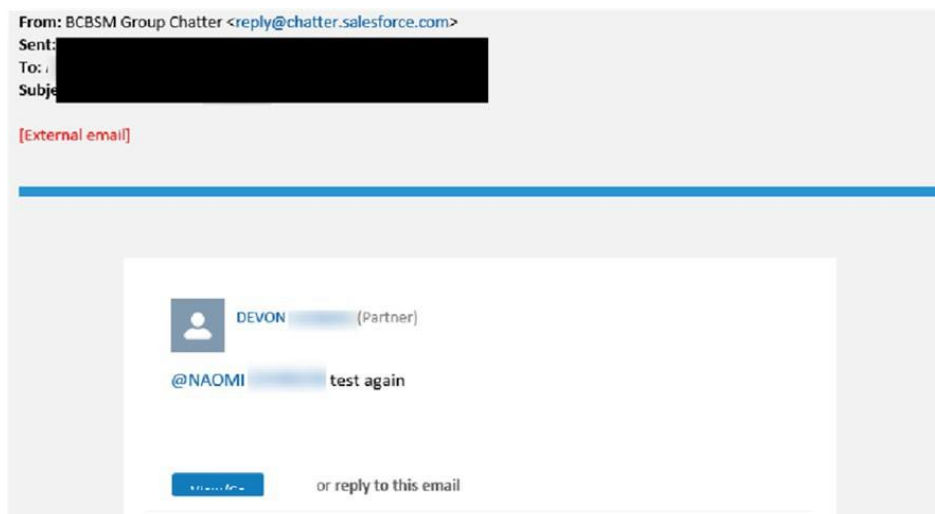
Agency Address

Agency Phone Number

Agency Tier

Email Notification

Below is an example of the Chatter notification you can expect to receive when the Account Service Representative is requesting more information.





Blue Cross Blue Shield of Michigan and Blue Care Network are nonprofit corporations and independent licensees of the Blue Cross and Blue Shield Association