Individual Agent Support Request Job Aid

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File Formats

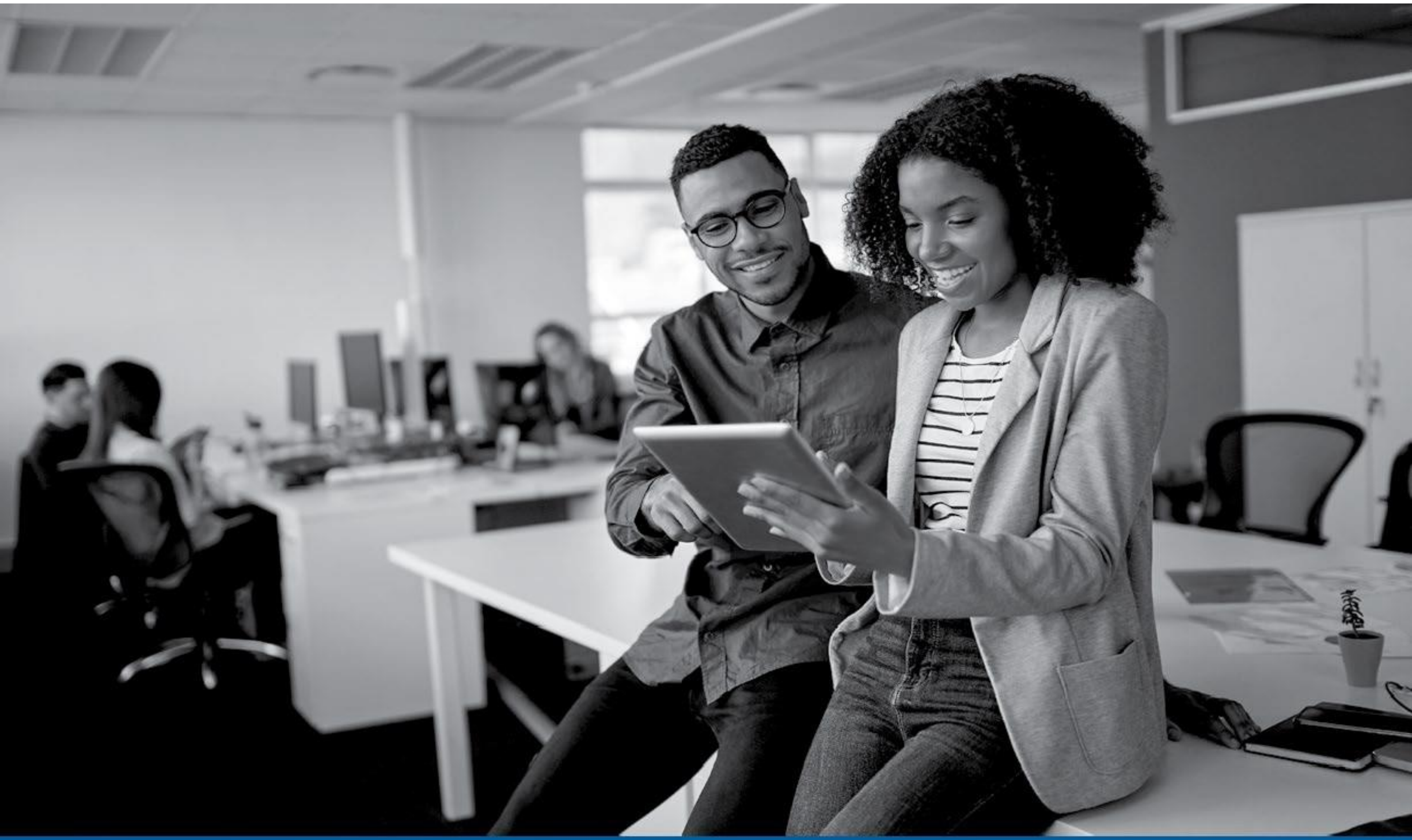
OneSource can accept the following file formats for upload:
.doc; .docx; .jpeg; .jpg; .msg; .pdf; .png; .tif; .tiff; .xls; .xlsx; .ppt; .pptx

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.



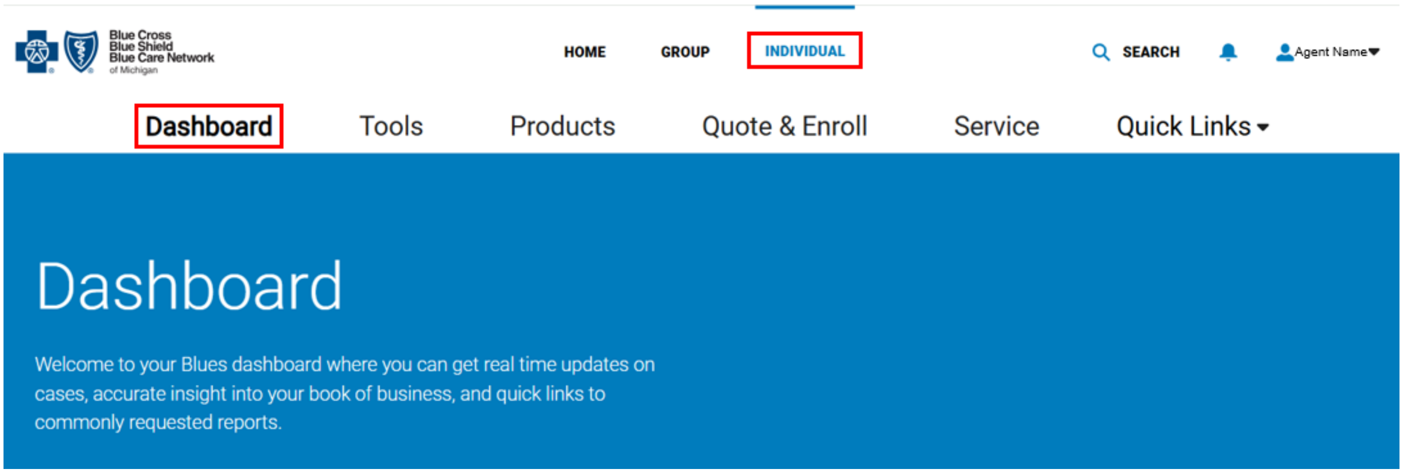
Agent Administrative Support Request

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

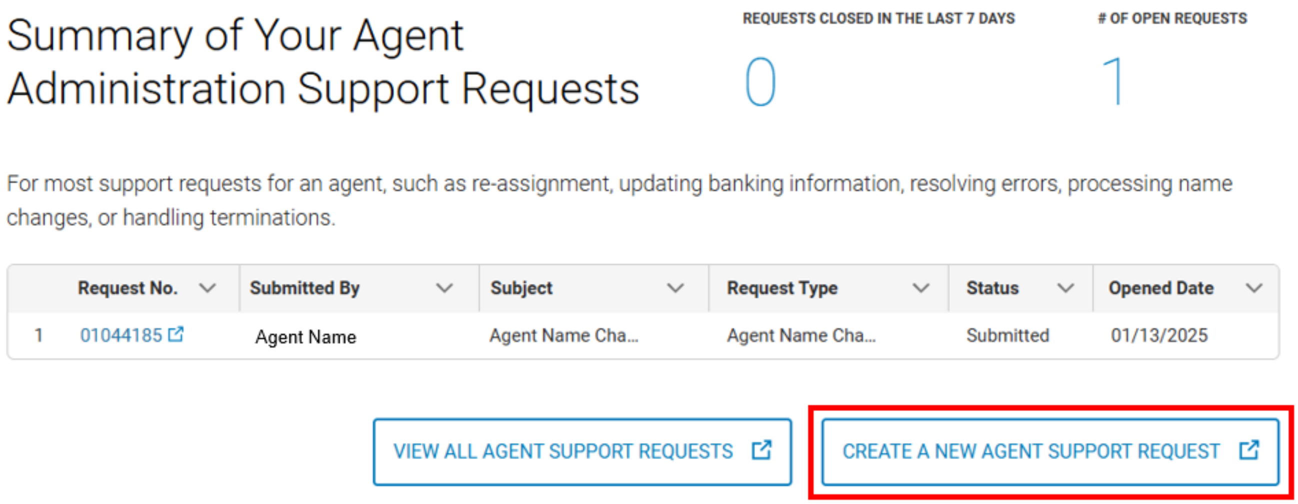
First you will need to log in to the [Agent Portal](). If you have not signed up for the new Agent Portal, please contact your Sales Consultant for next steps.

Launching a Request

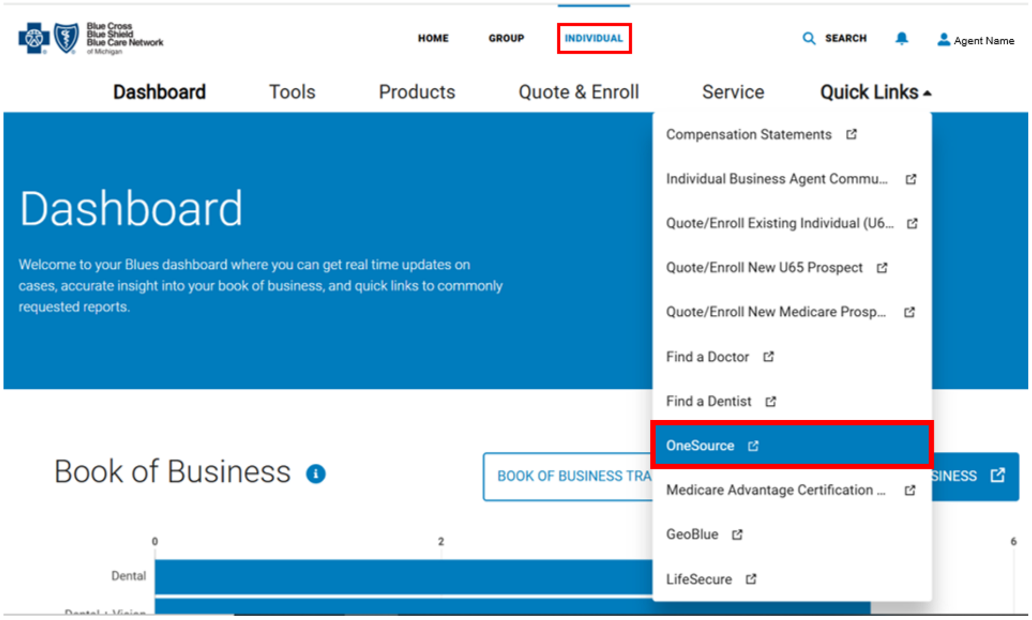
1. If you have active Individual U65 and/or MA business, you will navigate to the Individual Dashboard in Agent Portal to launch your agent support requests.



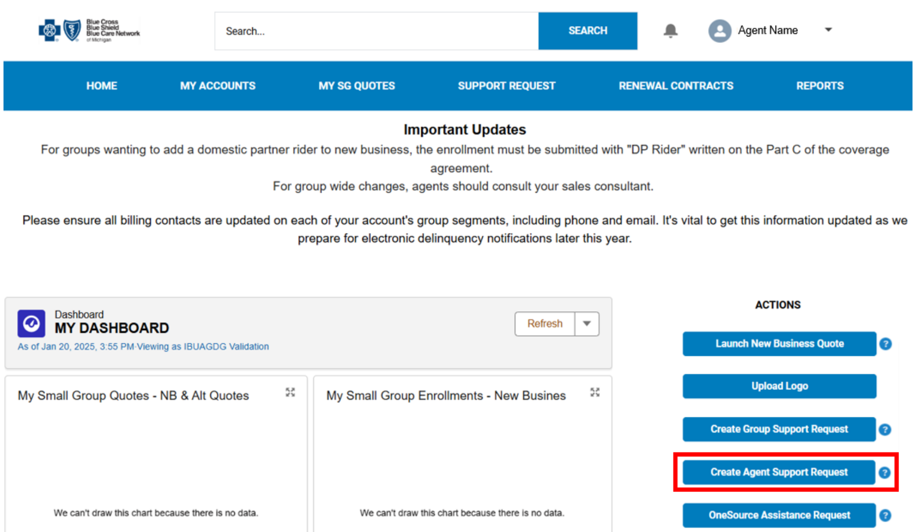
2. You will find a new section called Summary of Your Agent Administration Support Requests. In this view you will see a list of your recently submitted support requests.
   At the bottom of the view, Click the **Create a New Agent Support Request** button, this will launch a new window to create and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



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.

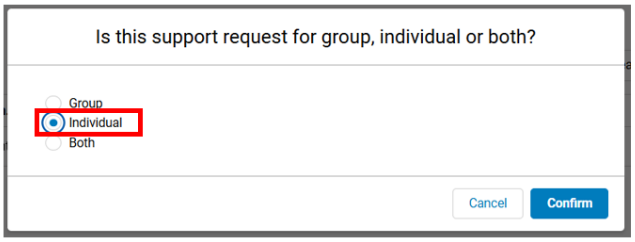


4. From the OneSource homepage, you will select **Create Agent Support Request**.



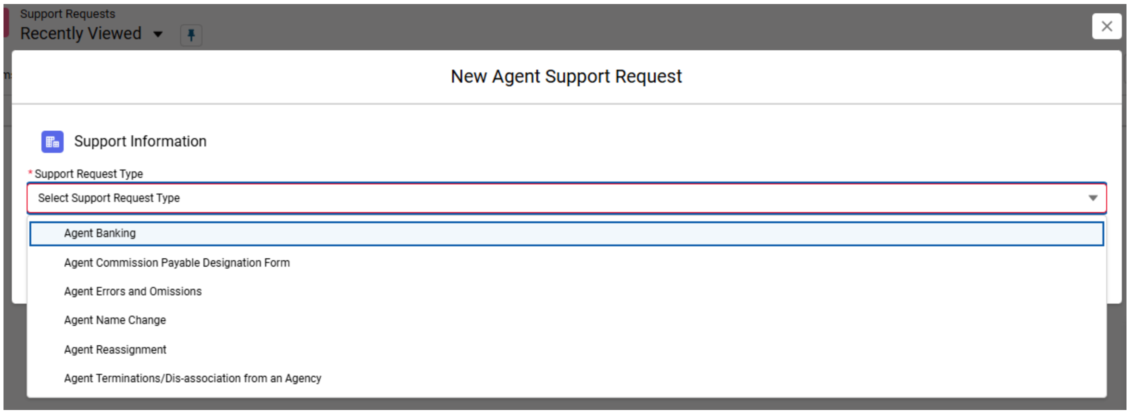
5. Select the line of business that you would like to submit the support request for: Group, Individual, or Both.

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

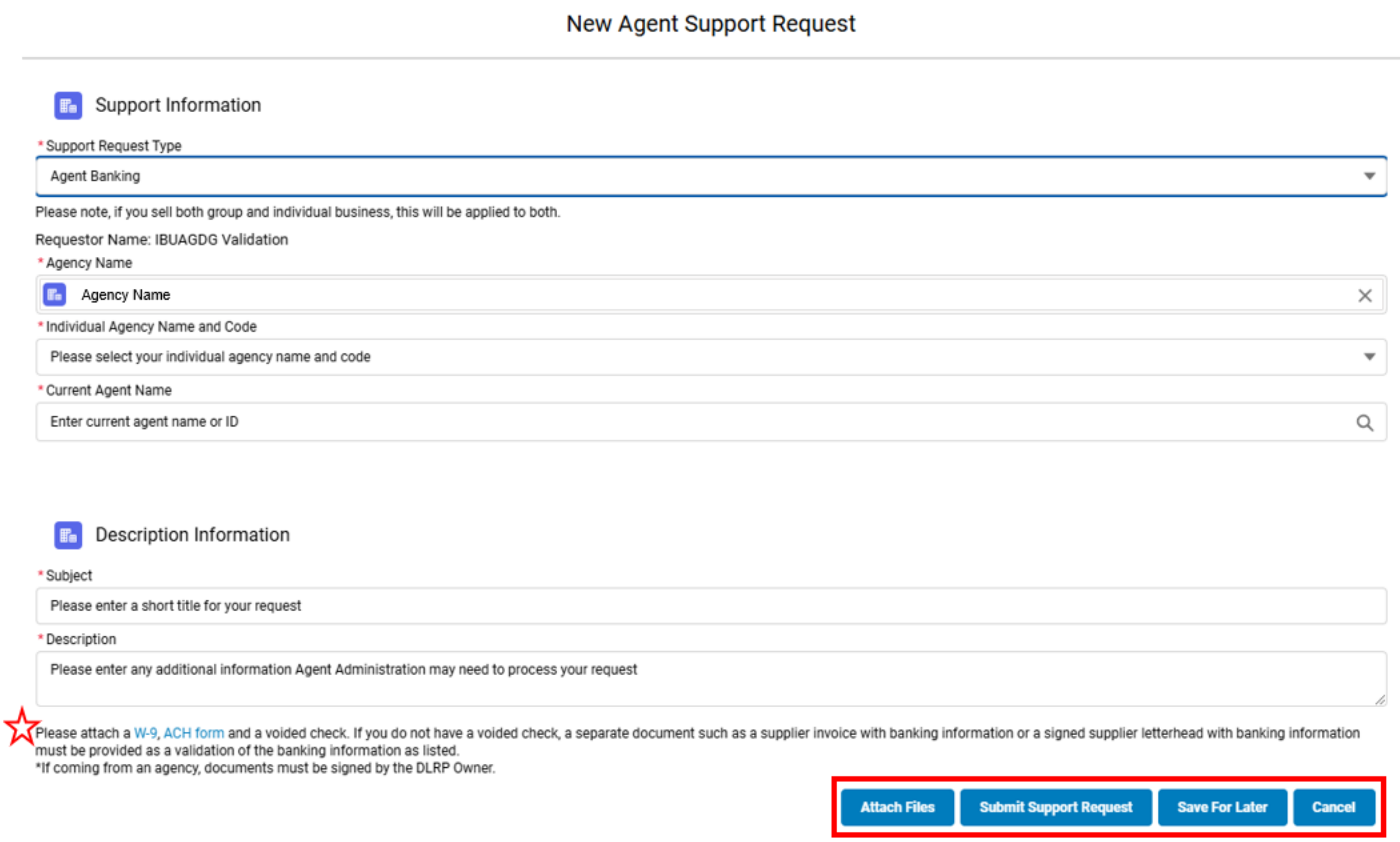


Submitting a Request

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

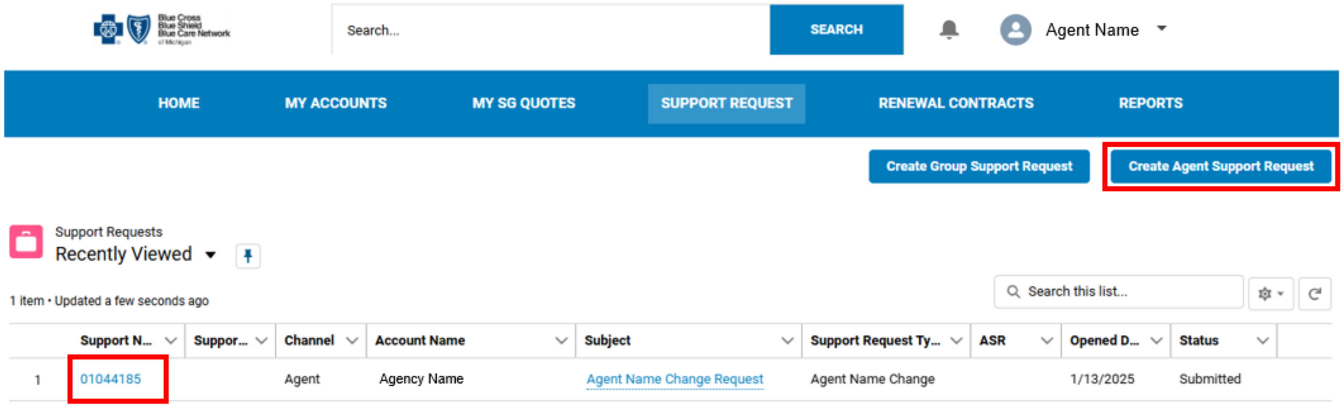


2. Each support request will have fields that will need to be filled out for that type of request. Please fill that out with all required information, indicated with an asterisk. An example of Agent Banking is shown below. Once complete, select **Submit Support Request.**



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****.*

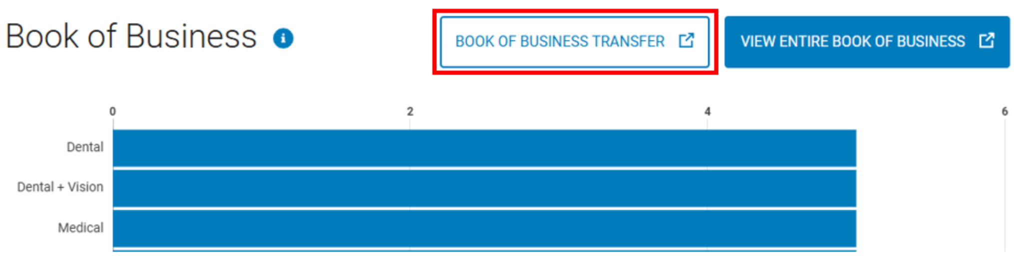
3. Once the request has been submitted, you will be brought to a view to see all of your support requests. You can select the Support Number to review requests or if you have subsequent requests, you can select **Create Agent Support Request** at the top right of the screen.



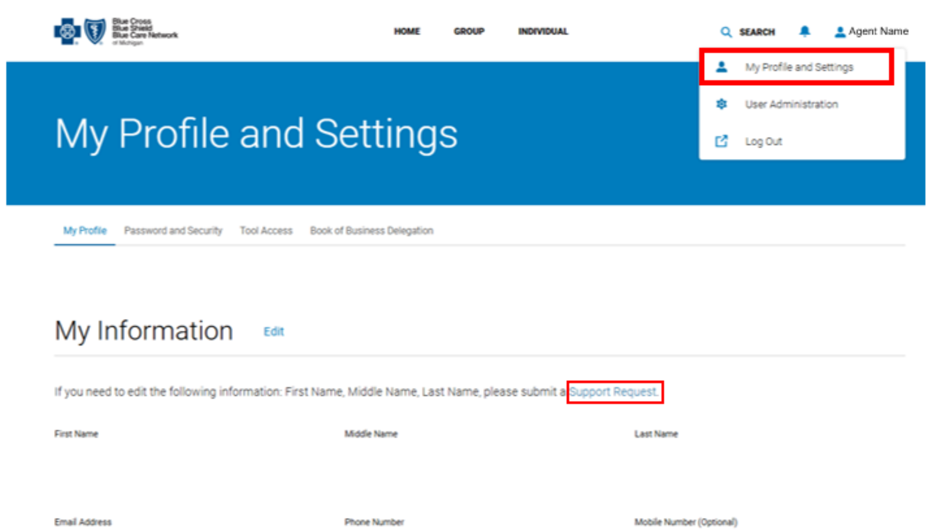
4. Additional ways to launch support requests:

   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.

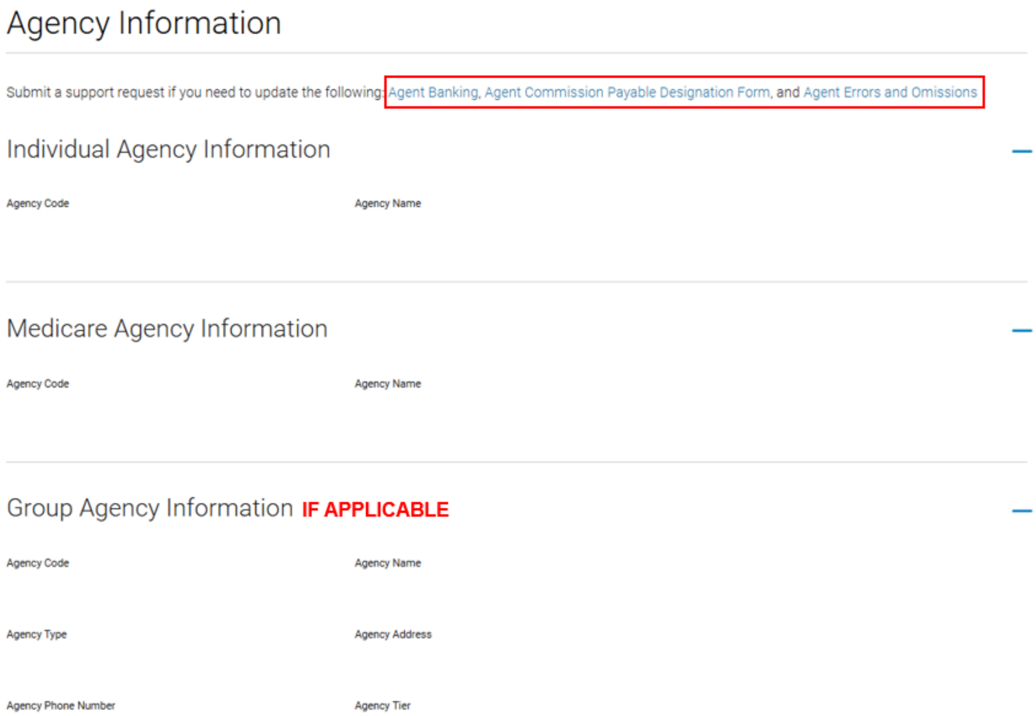
   - **Book of Business Transfer:** From the Individual Dashboard, select **Book of Business Transfer.**



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

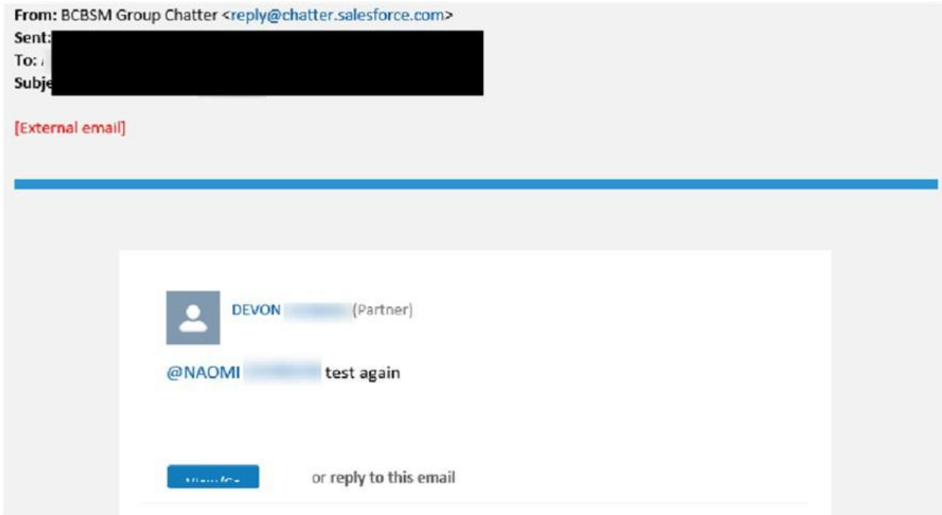


- **Agent Banking, Agent Commission Payable Designation Form, and Agent Errors and Omissions:** Also from the **My Profile and Settings** page, scroll down to find Agency Information where you can submit **Agent Banking, Agent Commission Payable Designation Form, and Agent Errors and Omissions** requests.



Email Notification

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



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