

Refreshed Blueprint for Agents Portal - QuickStart Guide (QSG)

Arkansas Blue Cross Blue Shield (ABCBS) and licensed affiliates

Summary

The refreshed, new Blueprint for Agents Portal (BPA Portal) will operate in parallel to the current/legacy BPA Portal until (at least) July 8th. During this parallel changeover, starting June 8th, please navigate to the legacy portal should you run into any issues.

- New BPA Portal URL: <https://bpa.arkansasbluecross.com/>
 - Important Note: The new portal is a live website, and any activity will be considered production data.
- Current/Legacy BPA Portal URL: <https://secure.blueprintforarkansasagents.com/Login/Login.aspx>

Our initial June 8th release will largely be a lift-and-replace of the current portal to the new BPA Portal. Core functionality you depend on from us is included with the new BPA Portal, such as the ability to:

- See and service your book of business (Group Listing and Individual Current Enrollment Listing)
- View application history (Individual Application Status List and Group Additions)
- Access current quote, enrollment, and renewal tools (i.e. Small Group, Medicare, FFM, Dental/Vision)

What to expect?

- The look and feel of the platform, while very familiar to what you would expect, includes much less clutter. This may take some getting used to, but because core functionality remains unchanged you will find basic navigation to be very intuitive.
- Agency owners and principals will have some decisions to make when deciding access/roles they want to provide users in their agency. You can use the 30-day transition period to orient and make these decisions.
- Some big enhancements are already in the pipeline for later this summer and fall, but we will also be continuously making incremental, smaller enhancements/fixes.

Understanding User Setup and Configuration Options

Understanding the default, June 8th go-live user setup settings:

- Each agency will have **one** user designated as an **agency admin**. This same user will also have access to see the agency commission statements (**agency admin with commission statement**). This default agency admin user serves as the agency chief admin in the legacy system.
- Outside of the above, we will not pre-configure any other users with designated assistant access (see other agent user's business, applications, group additions, etc.). Instead, we want to give you an opportunity to understand the options and then make decisions on configuration.

What agency/agent assistant access and security control options do you have?

- Access to Commission Statements
 - Access to commission statements for an agency is a designated permission, and agencies can have multiple users with this permission (agency admin with commission statement).
- **Assistants** can be any user in the agency (agent or non-agent). Assistants can see other agent users' customers (i.e. their book of business and any applications submitted).
 - The system does not support assistants submitting quotes and enrollments on behalf of another user, though we're reviewing and considering this as a future feature.

- There are two options when deciding how to delegate assistant access:
 - Option 1: Individually designate users within the agency as assistants for **specific** users.
 - This gives you the ability to be selective. This is a self-service feature for any user with agency admin access. Navigate to Agency Tab->Assistant Relation Tab
 - Option 2: Delegate users as agency admins **without** access to commission statements. This gives the designated users assistant access to all users.
 - This is not a self-service feature. You must submit a request for this through a Case, or by emailing your product representative.

Note: Agency admin users are not listed on the assistant relation tab, as it is understood these users can see all agents in the agency.

Cases

Cases are a new feature we are sharing in the initial release of the refreshed BPA Portal. A case is simply a unique inquiry that allows the user to securely communicate with their ABCBS team. Think emails, but better. The same teams responding to your emails will be responding and updating any cases you submit. Submitting cases is intuitive, but we will share a few important notes and tips.

What are the different case types?

Different case types are available in different areas of the site. While we have a no wrong door policy and will route your case appropriately behind-the-scenes, we can work more efficiently for you if you take note of different case types and their intended function.

- General Inquiry Case
 - Location: Accessed by selecting the “Need Help?” tab in the new BPA Portal
 - Intended Function: You can submit a generic/general inquiry here, routing to either your Individual or Group team.
- Order Individual Marketing Materials
 - Location: Accessed on the Resources tab in the new BPA Portal
 - Intended Function: This replaces the Order Supplies functionality on the legacy BPA Portal. The orders are routed to your ABCBS Consumer Retail Markets (CRM) team to fill your requests.
- AgencyTab (Broker Support and Agency Management) Cases
 - Location: Accessed on the Agency tab in the new BPA Portal
 - Intended Function: Those inquiries only appropriate for agency admins. Only agency admins have access to the Agency tab, and all cases submitted from this tab are routed to the Broker Support Team (Commissions and Agency Management Team). Inquiry types appropriate for this case type are: Commissions questions, requesting Agent/Agency contact info changes, requesting additional permissions for any users in your agency, etc.
- Individual Membership Cases
 - Location: Accessed only from an Individual tab->member plan detail page in the new BPA Portal
 - Intended Function: Inquiries specific to a member/policy, requesting policy cancellation, mailing address change, autopay cancellation, etc.
- Individual Application Cases – Accessed only from an Individual application plan detail page
 - Location: Accessed only from an Individual tab->Application->application detail page in the new BPA Portal
 - Intended Function: Works just like Individual Membership Cases, but the specificity is at the Individual application level. Agents should use this type, accessed from the application detail page, when inquiries are specific to an application or enrollment.

Sharing Attachments and Comments on Cases

- Securely Share Attachments: **After** submitting a case, the user can securely share attachments with your ABCBS team.
 - Go to “Cases” tab, select the case, and then select “Related”
 - Uploading a secure attachment, with specific context for the attachment, has never been easier.
- What to ping your ABCBS team with more information, or request a status update?
 - Post a new comment on a case. Go to “Cases” tab, select the case, and then select “Related”
 - When you post a new comment, the ABCBS queue owner of your case will get an email notification and will respond accordingly.
- Your ABCBS team can also add a comment, and you will get an email notification letting you know a new comment has been made on your case.

Small Group Renewal Quote Options – Important Information

- Starting with October 1st non-metallic renewals (released to agents in July), those who choose to run options will have the ability to do so in the Total Enrollment Solution (TES) alongside metallic options. This will be the default and only option starting with October 1st renewals.
- Any unfinished renewals already released to agents in the legacy BPA Portal, will work just as they do today in legacy BPA Portal: agents can see their non-metallic renewals with an option to “renew in TES.”
- Regarding dual-option renewals, the process is unchanged: Contact your Agent Broker Representative for options.

FAQs and Knowledge Tips

- I accessed the new portal onboarding link, but it says it has expired. What do I do?
 - Go to the new [portal login page](#) and follow the Forgot Password steps.
- What is my username?
 - Your username is the email address we have on file for you. If you still have trouble, contact your ABCBS Agent Support Team for assistance.
- I am having issues, where do I report these?
 - Contact your product representative or broker rep with system issues. In the meantime, you can go to the legacy portal.
- How do I remove access of an agent user within my agency?
 - Just like today, our Broker Support Team will need to remove the appointment with your agency for agent users. The agent will no longer be affiliated with your agency in the portal.
- How do I remove access of an agency admin user?
 - You will need to submit a case (preferred) or you can email your ABCBS product/broker rep.
- How do I remove access of an assistant?
 - You can do this within the portal yourself, or you can email your ABCBS product/broker rep.
- I need to add a new user, what do I do?
 - For agent users, the process is the same as it is today. We will add a user account for the agent at completion of their onboarding to your agency and product appointment.
 - If you have a non-agent assistant you wish to add, agency admin users can request a new user be added by submitting a case under the Agency tab. Or you can email your product representative.