BlueCross BlueShield
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Producer Experience Portal

Producer Experience Portal: Client Search & Detail View User Guide

Purpose:

The Producer Experience Portal enables Producers, Sub-Producers, General Agents (GAs), Agencies, and delegates to perform a basic and advanced client search. This section covers how to navigate the client details page, and view client information including general information, application information, and policy information.

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Client Search: Basic Search

1. To use **Basic Search** feature, locate the **Client Search** panel on the **PEP Home Page**-

   A. Select a search criteria from the dropdown-

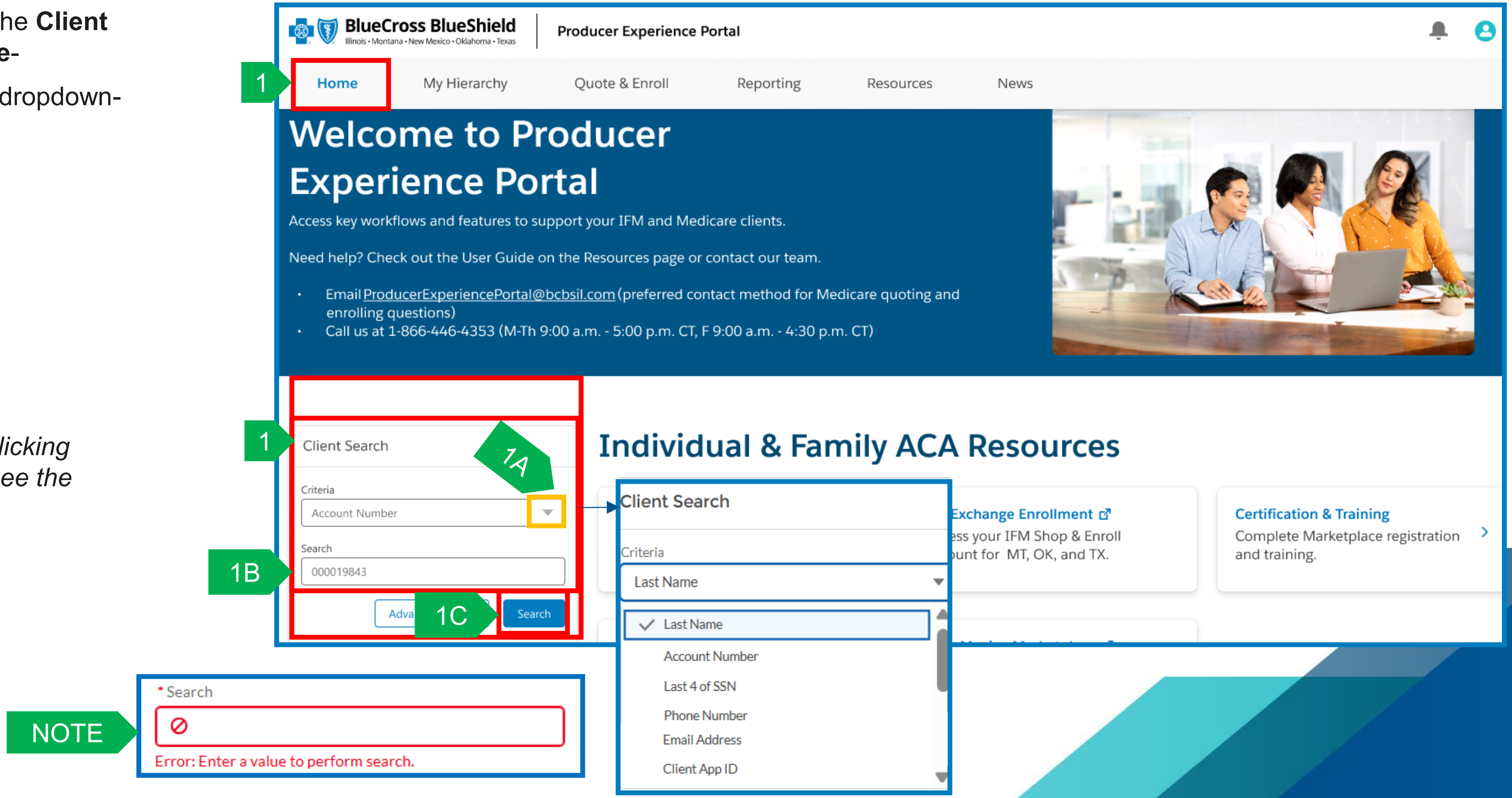
   - Last Name
   - Account Number
   - Last 4 of SSN
   - Phone Number
   - Email Address
   - Client App ID

   B. Enter value in the Search field

   C. Click on Search

***NOTE:** You must enter a value before clicking Search. If no value is entered, you will see the following error message.*

"Enter a value to perform search."



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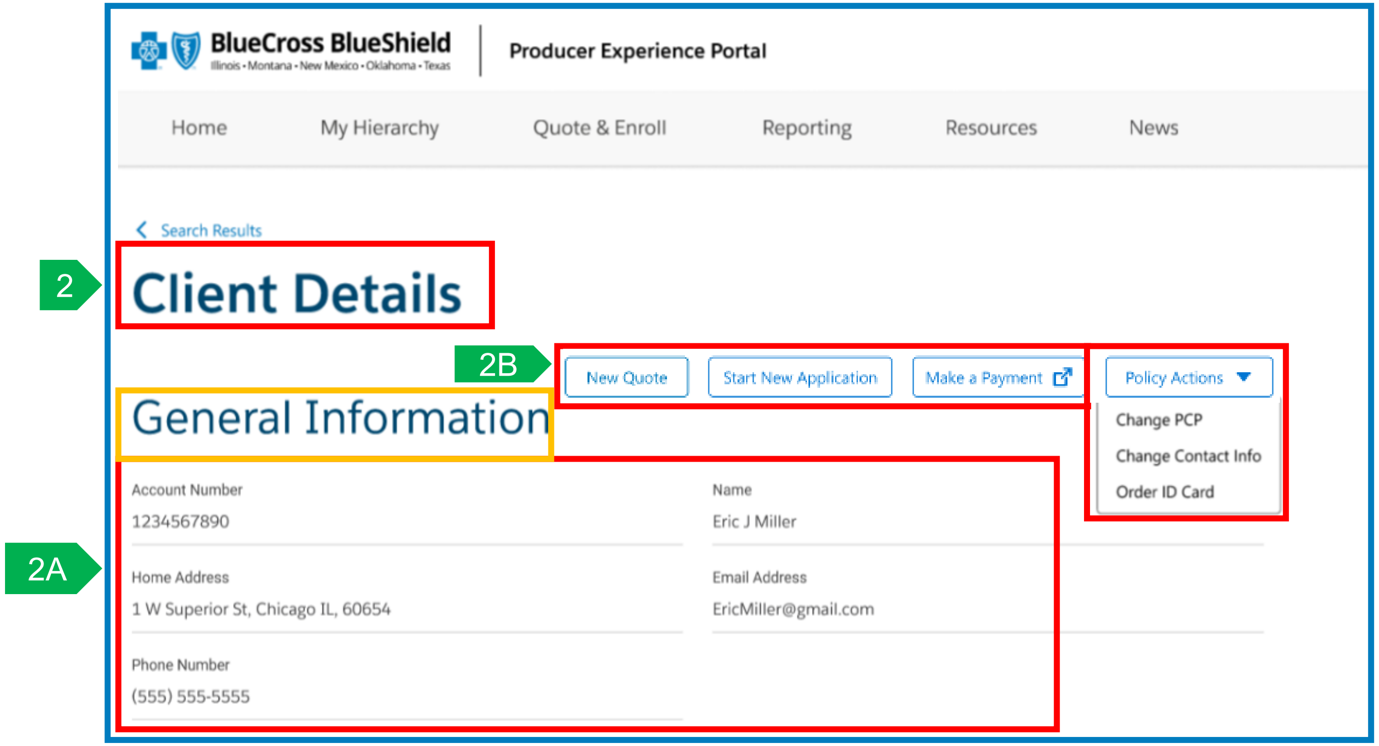
Client Details Page: General Information

2. If the search retrieves **only one matching record**, you will be immediately directed to the **Client Details Page**
   A. The **General Information** section provides a summary of client's account and contact details. You can use this section to review the following client information-
      - Account Number
      - Full Name
      - Home Address
      - Email Address
      - Phone Number

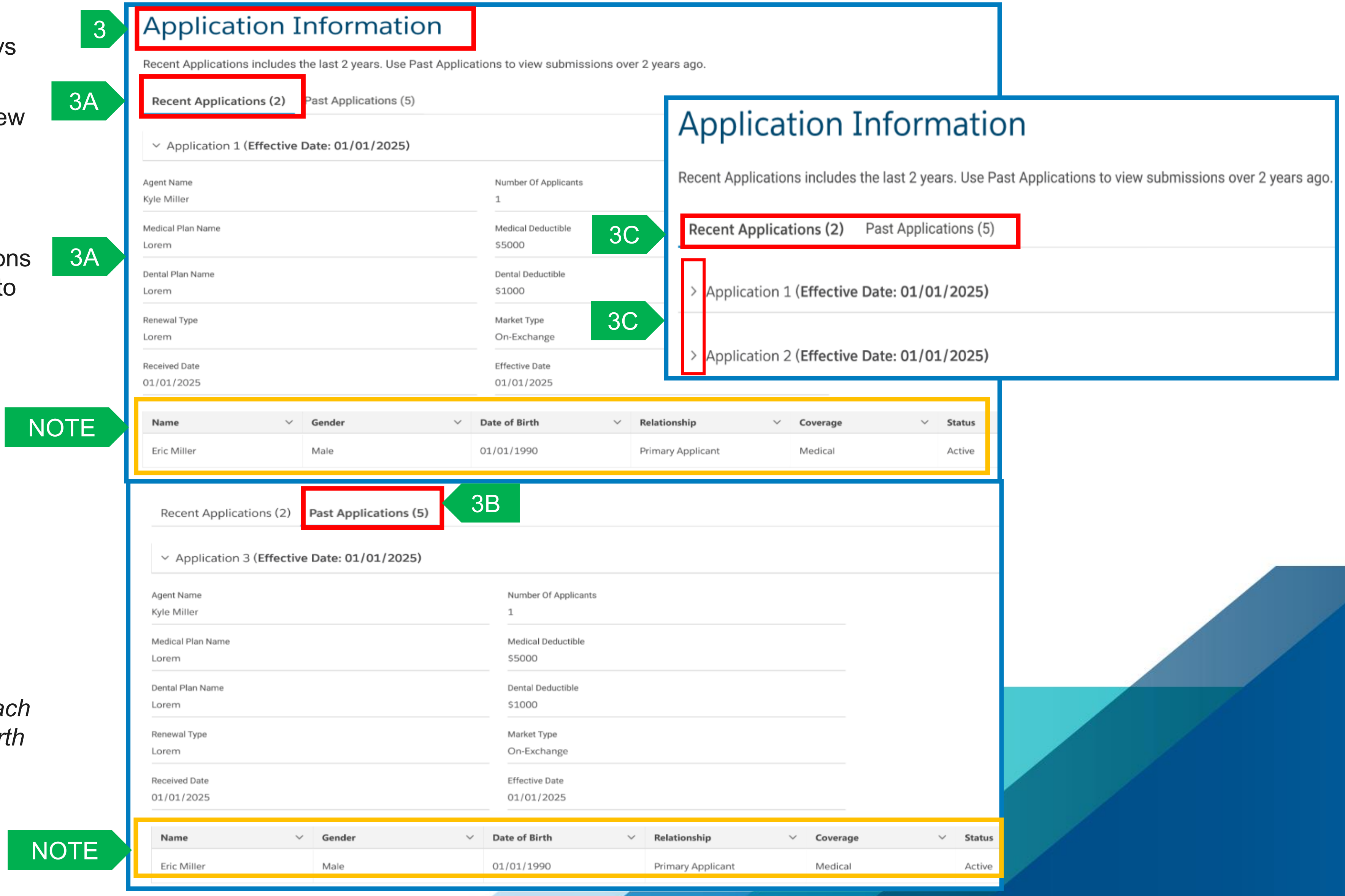
   B. From the **General Information** section, you can also initiate the following actions-
      - New Quote – Initiate a new quote
      - Start New Application – Begin a new application
      - Policy Actions – Manage existing policy such as changing PCP, changing contact info, and ordering ID Card
      - Make a Payment – Submit your client's required payment



Client Details Page: Application Information (Recent and Past)

3. The **Application Information** section displays the client's submission history-
   A. Select the **Recent Applications** tab to view applications from the last 2 years
   B. Select the **Past Application** tab to view submissions that are older than 2 years
   C. Click the **>** button to expand the applications and view its details. You will also be able to see the number of applications on each tabs-
      - Agent Name
      - Medical Plan Name
      - Dental Plan Name
      - Renewal Type
      - Received Date
      - Number of Applicants
      - Medical Deductible
      - Dental Deductible
      - Market Type
      - Effective Date

***NOTE**: The Applicant Table at the bottom of each application displays Name, Gender, Date of Birth (DOB), Relationship, Coverage, and Status.*



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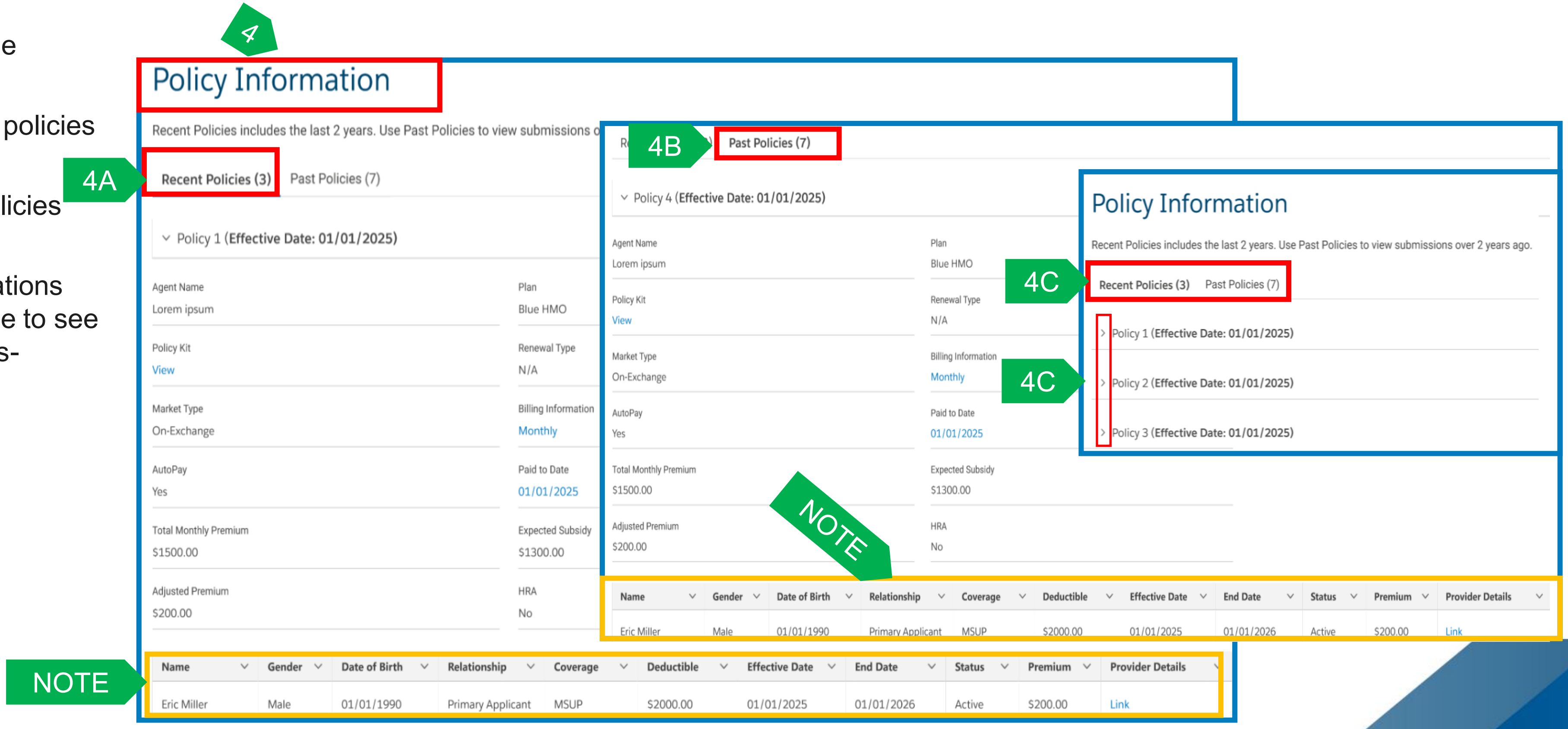
Client Details Page: Policy Information (Recent and Past)

4. The **Policy Information** section displays the client's policy history:
   A. Select the **Recent Policies** tab to view policies from the last 2 years
   B. Select the **Past Policies** tab to view policies that are older than 2 years
   C. Click the **>** button to expand the applications and view its details. You will also be able to see the number of applications on each tabs-
   - Agent Name
   - Policy Kit
   - Market Type
   - AutoPay (Yes/No)
   - Total Monthly Premium
   - Adjusted Premium
   - Plan
   - Renewal Type
   - Billing Information
   - Paid to Date
   - Expected Subsidy
   - HRA (ICHRA/ QSEHRA/ No)

NOTE*: The Applicant Table at the bottom of each policies displays Name, Gender, Date of Birth (DOB), Relationship, Coverage, Deductible, Effective Date, End Date, Status, Premium, Provider Details.*



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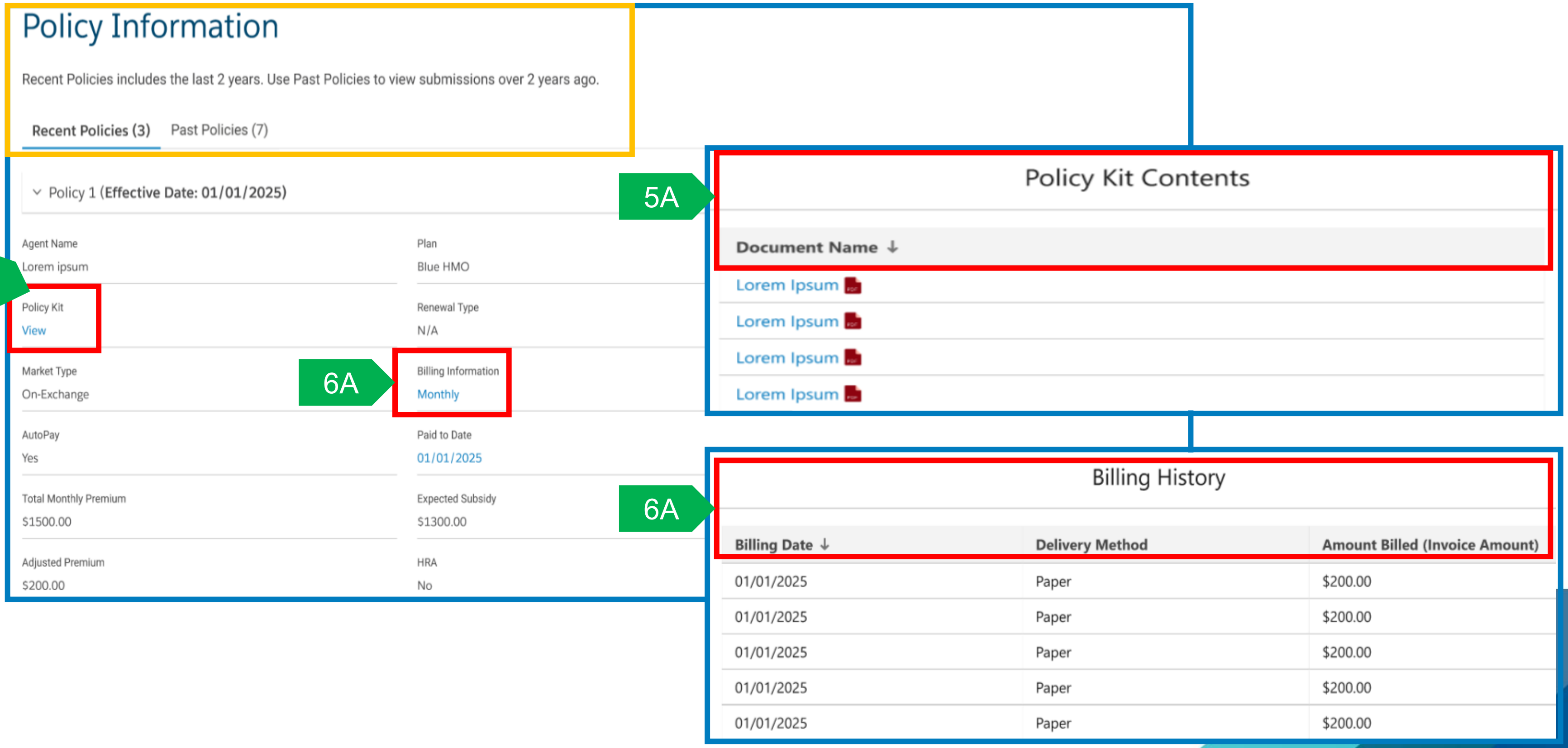
Client Details Page: Policy Information (Policy Kit and Billing History)

5. Navigate to **Policy Kit** (available for both Recent and Past Policies)
   A. Click on **View** to open the **Policy Kit Contents** document
      - A list of all available documents will be displayed

   NOTE: *Policy Kit is available for U65/ IFM clients ONLY.*
6. To retrieve **Billing Information**-
   A. Click on the **billing frequency hyperlink** (Monthly, quarterly, semi-annually, or annually) to open **Billing History** table. Following information will be displayed-
      - Billing Date
      - Delivery Method (Paper, Electronic, etc.,)
      - Amount Billed (Invoice Amount)

NOTE: *Billing Information is available for both U65 and O65 clients.*



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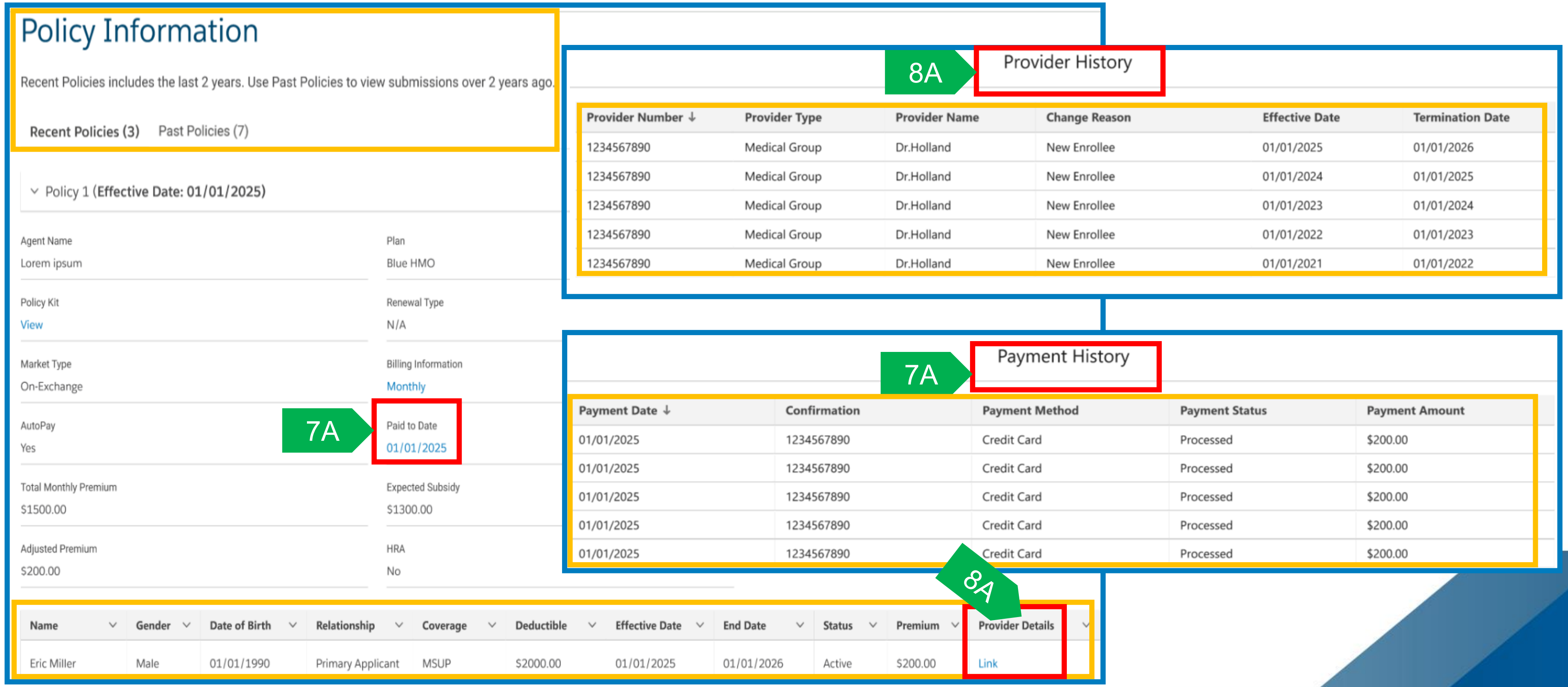
Client Details Page: Policy Information (Payment History and Provider Details)

7. Navigate to **Paid to Date** (available for both Recent and Past Policies)
   A. Click on the **date hyperlink** to open **Payment History.** Following information will be displayed-
      - Payment Date
      - Confirmation
      - Payment Method (Credit Card, Debit Card, etc.)
      - Payment Status (Pending, Processed, etc.)
      - Payment Amount

8. In the Applicant Table at the bottom to each expanded policy
   A. Locate the **Provider Details** column and click on **Link**. Following information will be displayed-
      - Provider Number
      - Provider Type
      - Provider Name
      - Change Reason
      - Effective Date
      - Termination Date



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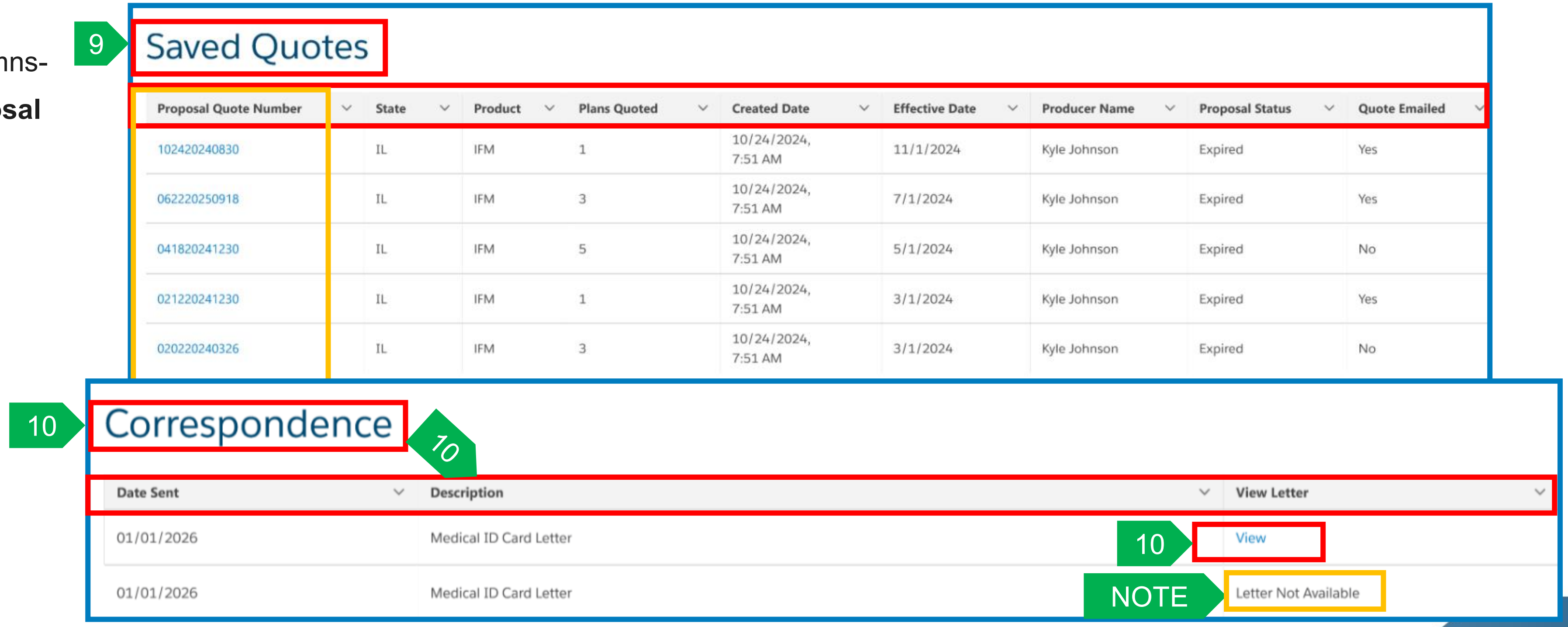
Client Details Page: Saved Quotes and Correspondence

9. You will scroll below to locate the **Saved Quotes** section that displays following columns-
    - Proposal Quote Number - Click on **Proposal Quote Number** to open the quote on the existing proposal page
    - State
    - Product
    - Plans Quoted
    - Created Date
    - Effective Date
    - Producer Name
    - Proposal Status (Active, expired, etc.)
    - Quote Emailed

NOTE: *This section is available for U65 /IFM clients ONLY – It does not appear for O65/Medicare clients.*

10. You will scroll below to navigate to the **Correspondence** section, the table displays-
    - Date Sent
    - Description
    - View Letter (Click "**View**" in the **View Letter** Column)

NOTE*: If a letter is not available, the column will display "Letter Not Available."*



Proposal Quote Number	State	Product	Plans Quoted	Created Date	Effective Date	Producer Name	Proposal Status	Quote Emailed
102420240830	IL	IFM	1	10/24/2024, 7:51 AM	11/1/2024	Kyle Johnson	Expired	Yes
062220250918	IL	IFM	3	10/24/2024, 7:51 AM	7/1/2024	Kyle Johnson	Expired	Yes
041820241230	IL	IFM	5	10/24/2024, 7:51 AM	5/1/2024	Kyle Johnson	Expired	No
021220241230	IL	IFM	1	10/24/2024, 7:51 AM	3/1/2024	Kyle Johnson	Expired	Yes
020220240326	IL	IFM	3	10/24/2024, 7:51 AM	3/1/2024	Kyle Johnson	Expired	No

Date Sent	Description	View Letter
01/01/2026	Medical ID Card Letter	View
01/01/2026	Medical ID Card Letter	Letter Not Available

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Client Search: Client Search Results

11. If the search retrieves **more than one matching record**, you will be directed to the **Client Search Results** page-

    A. The results page will display the following columns-

    - First Name
    - Last Name
    - Record Type
    - Client App ID
    - Coverage State
    - Member Count
    - E-App Number
    - Group Number
    - Account Number
    - Status
    - Product Type
    - Product Name
    - Coverage Effective Date
    - Paid to Date
    - Termed Date
    - Producer Name
    - Nine Digit Producer Number
    - NPN

***NOTE:** If the search retrieves more than 1,000 results, the user will be prompted to refine the search criteria to narrow down the results.*

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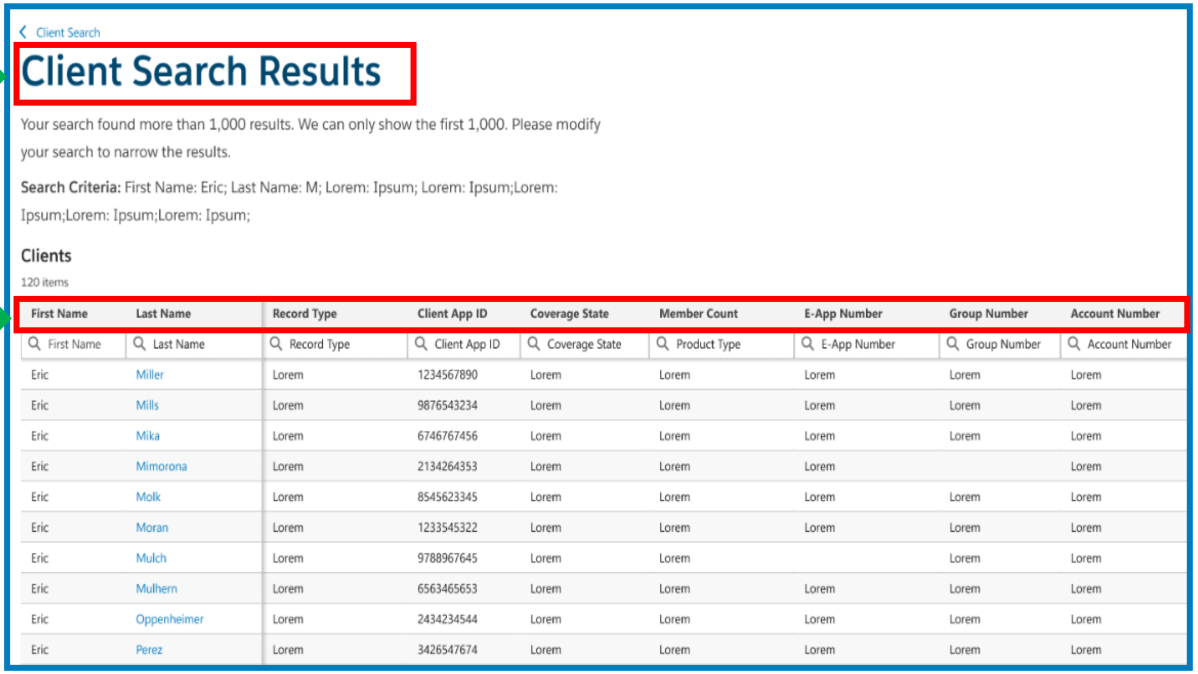


< Client Search

Client Search Results

Your search found more than 1,000 results. We can only show the first 1,000. Please modify your search to narrow the results.

Search Criteria: First Name: Eric; Last Name: M; Lorem: Ipsum; Lorem: Ipsum;Lorem: Ipsum;Lorem: Ipsum;Lorem: Ipsum;

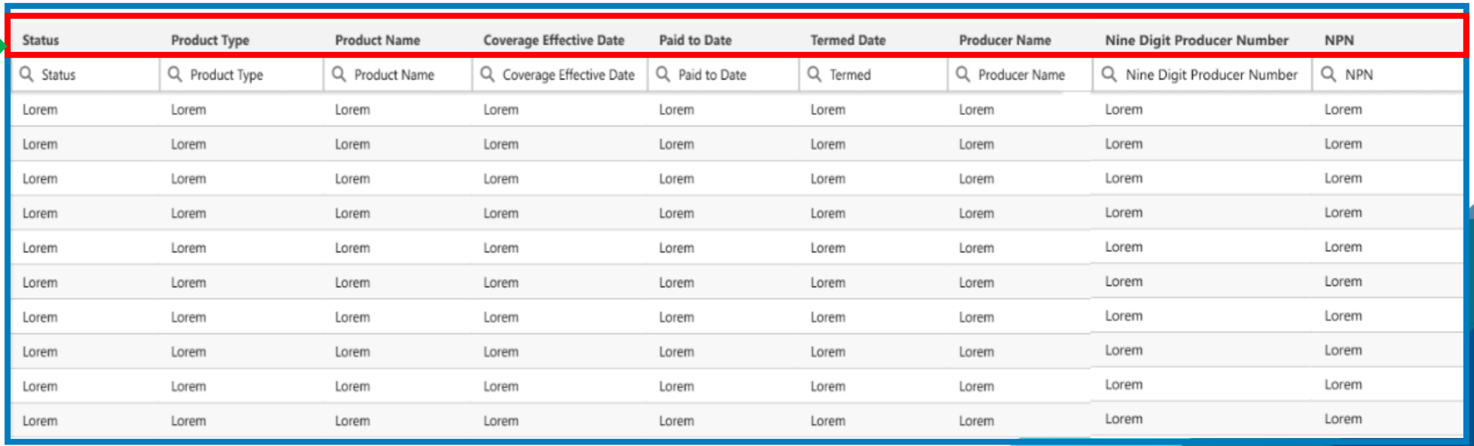
Clients

120 items

11A

First Name	Last Name	Record Type	Client App ID	Coverage State	Member Count	E-App Number	Group Number	Account Number
First Name	Last Name	Record Type	Client App ID	Coverage State	Product Type	E-App Number	Group Number	Account Number
Eric	Miller	Lorem	1234567890	Lorem	Lorem	Lorem	Lorem	Lorem
Eric	Mills	Lorem	9876543234	Lorem	Lorem	Lorem	Lorem	Lorem
Eric	Mika	Lorem	6746767456	Lorem	Lorem	Lorem	Lorem	Lorem
Eric	Mimorona	Lorem	2134264353	Lorem	Lorem	Lorem		Lorem
Eric	Molk	Lorem	8545623345	Lorem	Lorem	Lorem	Lorem	Lorem
Eric	Moran	Lorem	1233545322	Lorem	Lorem	Lorem	Lorem	Lorem
Eric	Mulch	Lorem	9788967645	Lorem	Lorem		Lorem	Lorem
Eric	Mulhern	Lorem	6563465653	Lorem	Lorem	Lorem	Lorem	Lorem
Eric	Oppenheimer	Lorem	2434234544	Lorem	Lorem	Lorem	Lorem	Lorem
Eric	Perez	Lorem	3426547674	Lorem	Lorem	Lorem	Lorem	Lorem

11A



Status	Product Type	Product Name	Coverage Effective Date	Paid to Date	Termed Date	Producer Name	Nine Digit Producer Number	NPN
Status	Product Type	Product Name	Coverage Effective Date	Paid to Date	Termed	Producer Name	Nine Digit Producer Number	NPN
Lorem	Lorem	Lorem	Lorem	Lorem	Lorem	Lorem	Lorem	Lorem
Lorem	Lorem	Lorem	Lorem	Lorem	Lorem	Lorem	Lorem	Lorem
Lorem	Lorem	Lorem	Lorem	Lorem	Lorem	Lorem	Lorem	Lorem
Lorem	Lorem	Lorem	Lorem	Lorem	Lorem	Lorem	Lorem	Lorem
Lorem	Lorem	Lorem	Lorem	Lorem	Lorem	Lorem	Lorem	Lorem
Lorem	Lorem	Lorem	Lorem	Lorem	Lorem	Lorem	Lorem	Lorem
Lorem	Lorem	Lorem	Lorem	Lorem	Lorem	Lorem	Lorem	Lorem
Lorem	Lorem	Lorem	Lorem	Lorem	Lorem	Lorem	Lorem	Lorem
Lorem	Lorem	Lorem	Lorem	Lorem	Lorem	Lorem	Lorem	Lorem
Lorem	Lorem	Lorem	Lorem	Lorem	Lorem	Lorem	Lorem	Lorem

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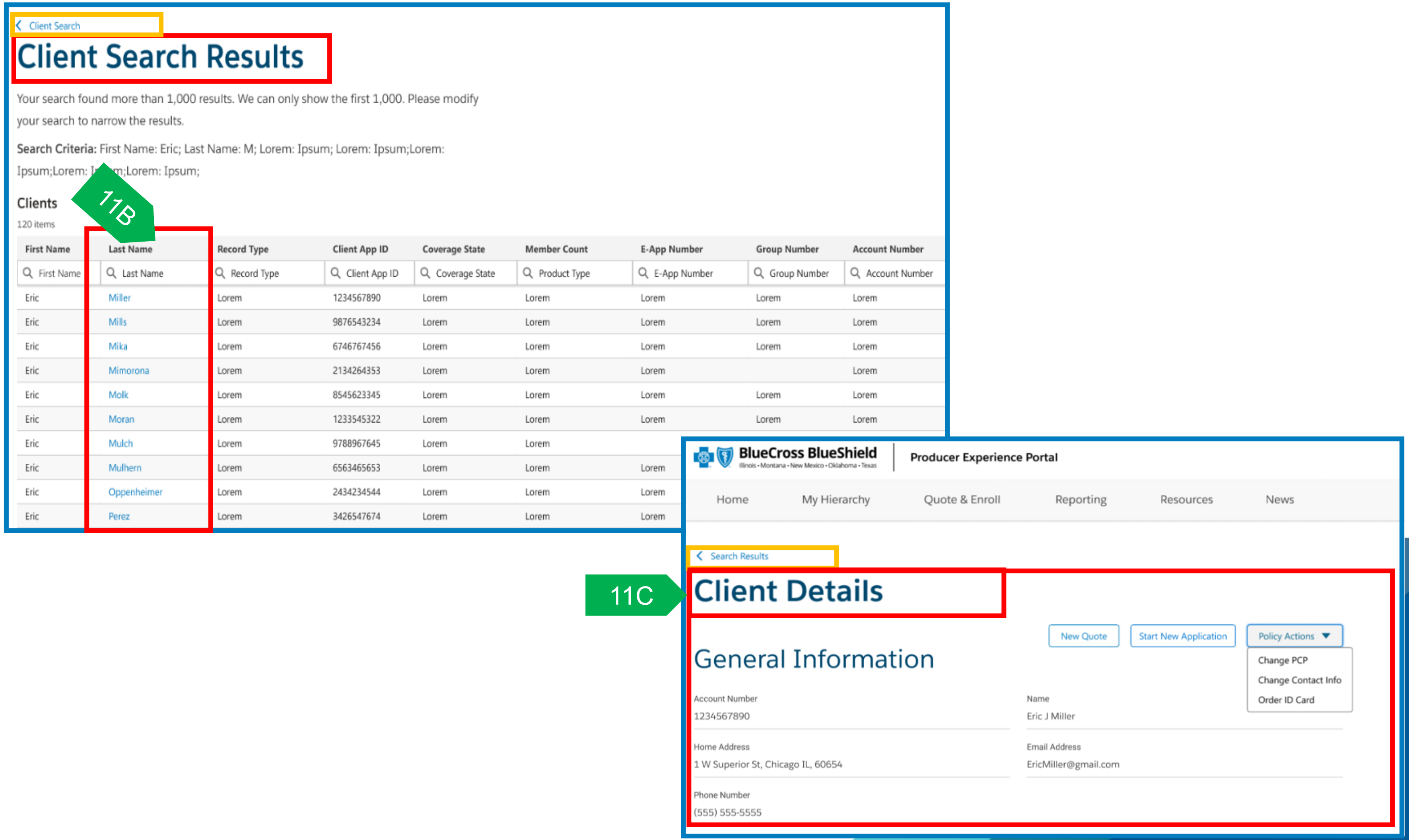
Client Search: Client Search Results

B. From the **Client Search Results,** choose the client's **Last Name** to view their detailed information

C. You will be directed to the **Client Details page**

NOTE*: You can Click on Search Results to go back to Client Search Results page and click on Client Search to go back to the PEP Home page.*

For next steps, refer to slides 4-9.



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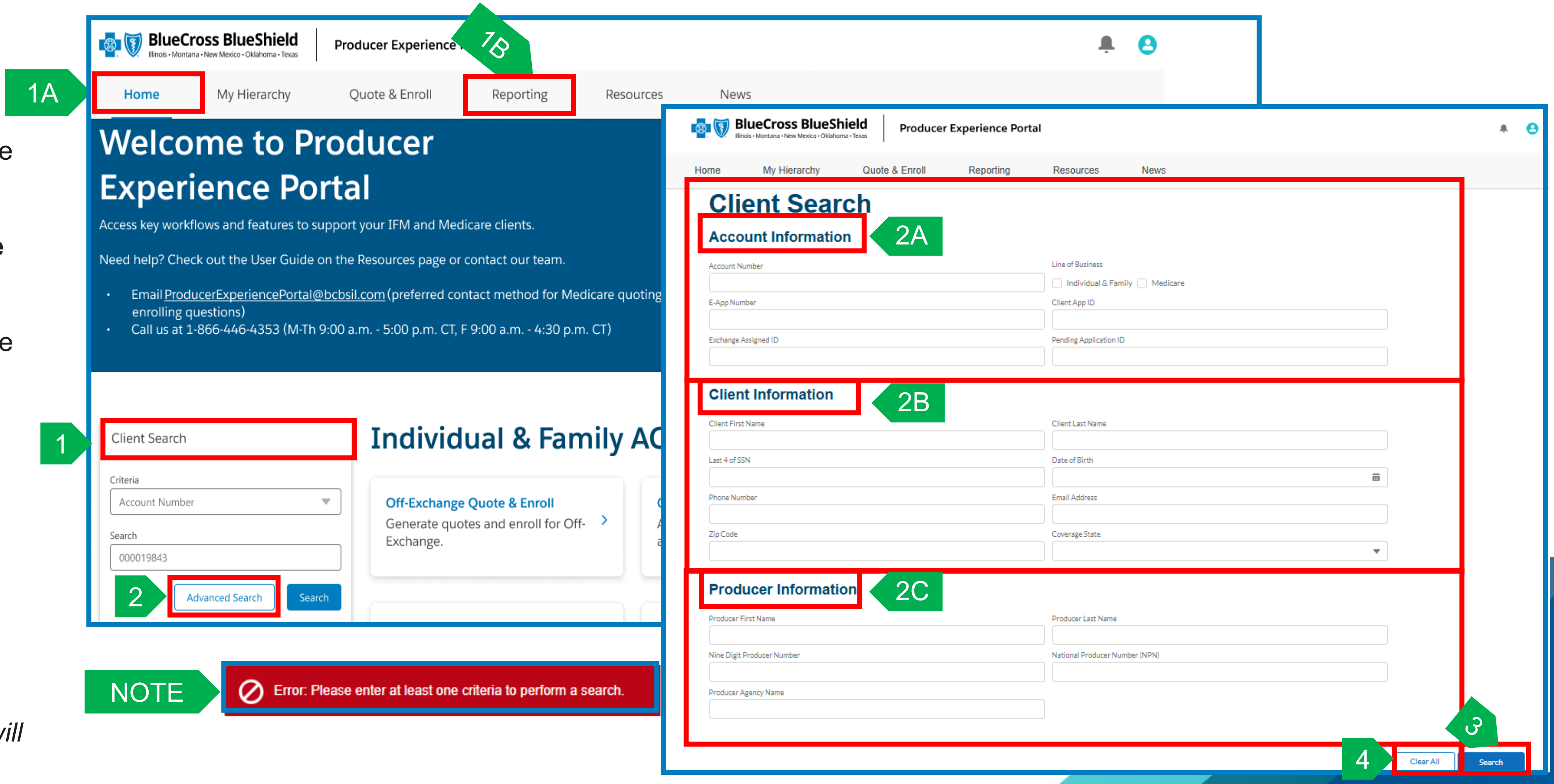
Client Search: Advanced Search (Through PEP Home Page)

1. To use the **Advanced Search** feature, locate the **Client Search** panel-
   A. From the **PEP Home Page OR,**
   B. Navigate to **Client Search** from the **Reporting** tab
2. If you navigate through the **PEP Home page**, you will click on **Advanced Search.** You will be directed to the **Client Search** page. Enter value in one or more of the following fields-
   A. Account Information
   B. Client Information
   C. Producer Information
3. Click on **Search**
4. To start over or to reset all the fields, click on **Clear All**

NOTE: *You must select at least one Line of Business (Individual & Family/ Medicare). If no criteria is selected, you will see the following error message.*

"Please enter at least one criteria to perform a search."



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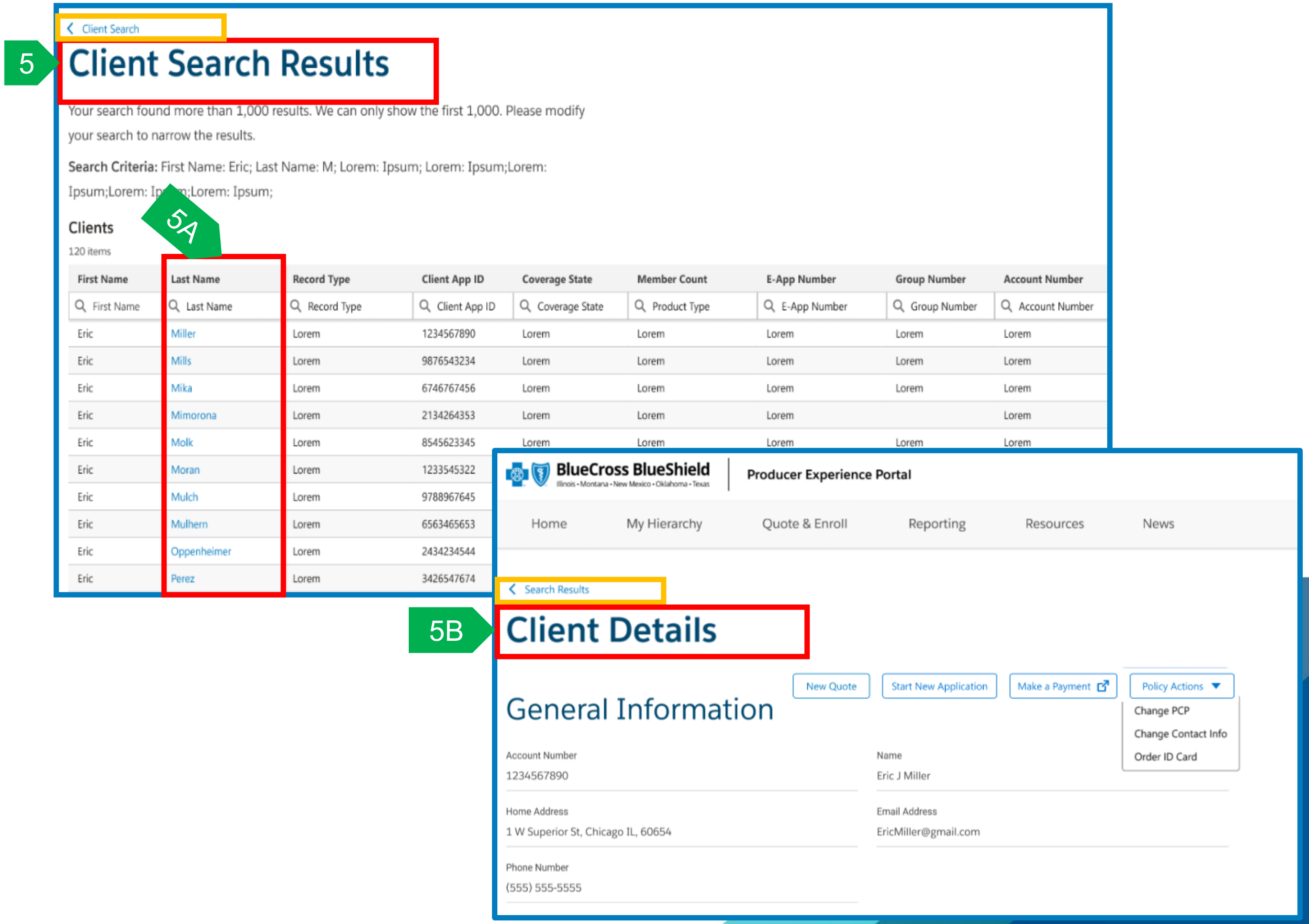
Client Search: Advanced Search Results (Through PEP Home Page)

5. You will land on the **Client Search Results** page
   - A. Choose the client's **Last Name** to view their detailed information
   - B. You will be directed to the **Client Details page**

***NOTE**: You can Click on **Search Results** to go back to Client Search Results page and click on **Client Search** to go back to the **PEP Home Page**.*

For next steps, refer to slides 4-9.



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Client Search: Advanced Search (Through Reporting Tab)

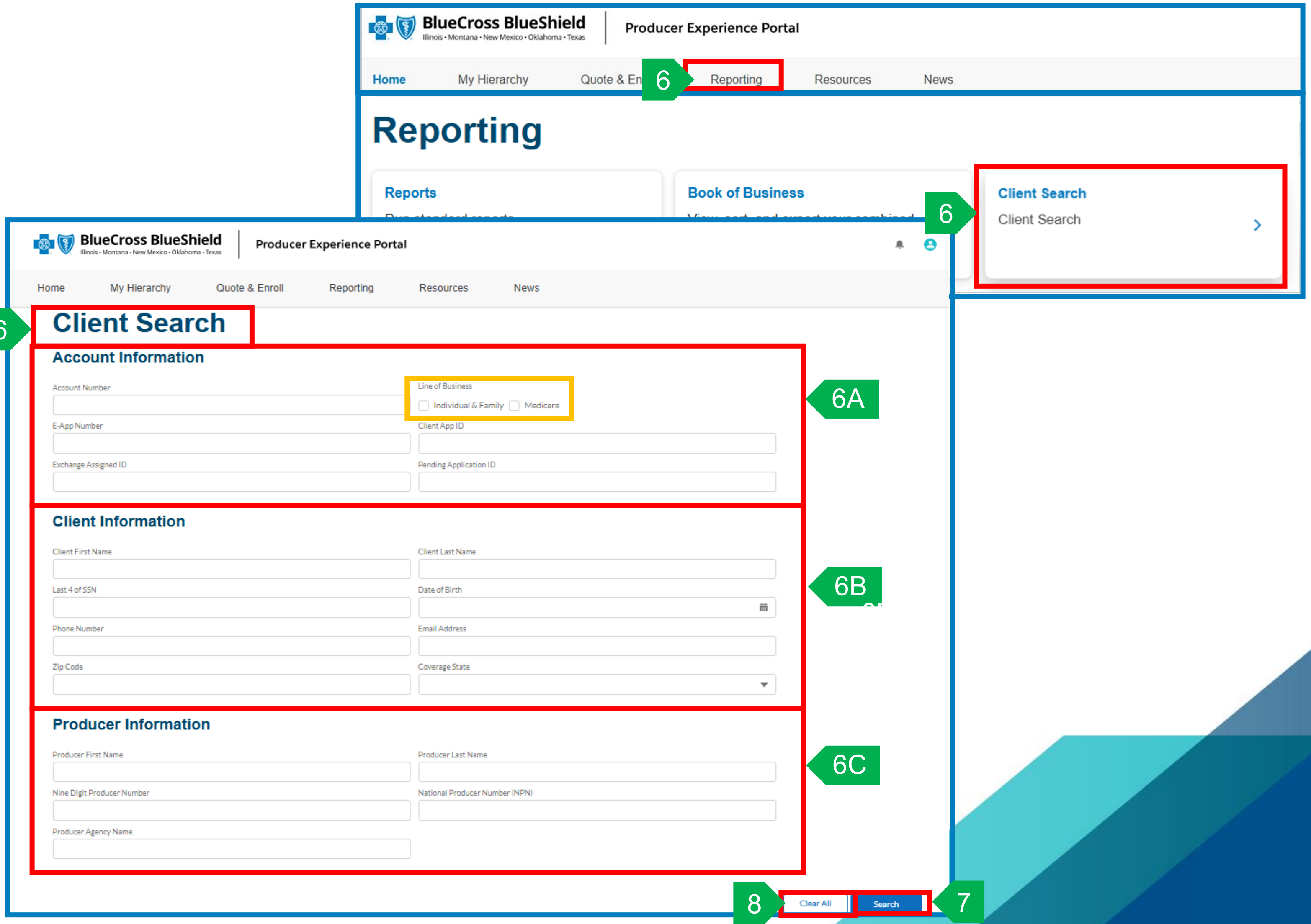
6. If you decide to navigate through the **Reporting** tab, select **Client Search**. You will be directed to the **Client Search** page. Enter value in one or more of the following fields-
   A. Account Information
   B. Client Information
   C. Producer Information

7. Click on **Search**

8. To start over or to reset all the fields, click on **Clear All**

   NOTE: *You must select at least one Line of Business (Individual & Family/ Medicare). If no criteria is selected, you will see the following error message "Please enter at least one criteria to perform a search."*

NOTE



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Client Search: Advanced Search Results (Through Reporting Tab)

9. You will land onto the **Client Search Results** page-
    A. Choose the client's **Last Name** to view their detailed information
    B. You will be directed to the **Client Details page**

NOTE*: You can Click on* ***Search Results*** *to go back to Client Search Results page and click on* ***Client Search*** *to go back to the PEP Home page.*

For next steps, refer to slides 4-9.