



Managing Delegates in Blue Access for ProducersSM

We designed Blue Access for Producers for producers and their administrative staff. Producers register for, and log into BAPSM with the 9-digit ID number we issue after onboarding. For clarity purposes, we call them “Primary” BAP accounts. Primary users can then give BAP access to Delegates and assign them roles. This allows a team to service clients in BAP while each person has their own unique User ID, password and email address.

Primary accounts for BAP versus Delegate Primary accounts for BAP

	Primary Accounts	Delegate Accounts
Who are they?	If we issued a producer a 9-digit producer ID number, that producer can and should register for BAP. This is true for all licensed producer types authorized to sell our products: • General Agents and Marketing Organizations • Agencies • Independent Producers • Subproducers (Those selling over-65 and retail ACA policies may need Primary accounts for BAP in order for us to track regulatory compliance.)	Delegates can be other producers, accounting personnel, admin support and more. Here are some examples: • A GA (or any producer type) with a Primary account adds an accountant as a Delegate and assigns them commission statement access. • An agency with a Primary accounts for BAP adds subproducers as Delegates and gives them group quoting access. • A subproducer in sales with a Primary account adds an account management colleague as a Delegate to manage groups post-sale.
What's their User ID?	The producer's own 9-digit ID number	The Primary producer's 9-digit number followed by a dot [.] and additional characters (for example, 123456789.Mary)
Can they give access to others?	Yes, primary users can give BAP access to delegates.	No, delegates can't grant BAP access to others.

Producers with multiple Producer ID Numbers and BAP User IDs

We recommend all producers, including subproducers, have their own Primary accounts for BAP. The contact information from a Primary account profile directly updates the producer's contact information in our producer database.

A producer can have multiple accounts. Here are some scenarios:

- Joe is a subproducer and has his own Primary BAP account to manage his own profile. He is also a Delegate under his agency's Primary accounts for BAP. He has two BAP accounts: one as a Primary and one as a Delegate.
- Mary is a producer who sells Medicare policies in Texas and Oklahoma. Mary has two Primary accounts for BAP: one for each state.

Adding Delegates

To add a delegate, click on Password Manager and then New Delegate (see image below). Go through the following fields (see image at right):

1. Enter a User ID. A Delegate's User ID will begin with your 9-digit Producer ID number followed by a dot [.]. You add the additional characters (for example, 123456789.Mary).
2. Enter the First Name and Last Name of your Delegate
3. Add a Phone Number.
4. The Mobile Number is optional. If the Delegate wants to verify their identity via SMS text messaging, they must save a Mobile Number.
5. Check the text messaging permission box.
6. Add the Email Address of your delegate. The email address is required. This address should belong to your Delegate.
7. Create a temporary password for your Delegate. When a new Delegate first logs in to BAP, they create their own password.
8. Assign Roles and click Save. For more on assigning roles, see page 3.

[Home](#) > [Password Manager](#)

PASSWORD MANAGER

New Delegate

Delegate List

Name	Producer Number	Status	Last Activity
Allen, Peggy	123456789.Allen	ACTIVE	02/20/2022 04:01 PM CST
Hartman, Sarah	123456789.Hartman	ACTIVE	03/10/2022 01:04 PM CST
Unrein, Alex	123456789.Unrein	ACTIVE	02/15/2022 04:09 PM CST
Jones, Mary	123456789.Jones	ACTIVE	03/10/2022 03:22 PM CST
Brown, Paul	123456789.Brown	INACTIVE	02/04/2020 09:06 AM CST

 **CREATE DELEGATE**

Delegate Profile

User Name *

User Name

First Name *

First Name

Last Name *

Last Name

Phone Number *

XXX-XXX-XXXX

Mobile Number

XXX-XXX-XXXX

☐ By saving a phone number for text messages, you are agreeing to receive recurring messages from us. Message and data rates may apply. For more information, you can view our [Terms of Use](#) and [Privacy Statement](#).

Email Address *

email@domain.com

Verify Email Address *

email@domain.com

New Password *

New Password

Confirm New Password *

Confirm New Password

Roles

Online Group Quoting

- ☐ Quote, Enrollment
- ☐ BlueTrack
- ☐ Request Center

Blue Access for Employers SM (BAE)

- ☐ Inquiry and Group Secure Messaging
- ☐ Maintenance and Group Secure Messaging
- ☐ Group Secure Messaging

Reports

- ☐ Reports

Commission Statements

- ☐ Callidus Reports & PDFs

Medicare

- ☐ O65 Inquiry

SAVE

CANCEL

Assigning Roles

Below are the different roles Primary account users can assign to their Delegates.

Online Group Quoting

Quote, Enrollment

Assign this role to allow a Delegate access to eSales functions:

- Quote and enroll group business.
- Track the progress of applications.
- See plan benefits and rates.
- Review renewal packages.
- View Management Reports (Texas only)

BlueTrackSM

Assign this role to allow a Delegate to only track the progress of group applications.

Request Center

This role allows Delegates to attach, submit and track small group paperwork changes in real time. These include:

- Plan changes
- Group contact, address, and anniversary date changes
- Regulatory data updates (i.e., Medicare Secondary Payer)

Reports

This role is available for Illinois Delegates only and grants access to Blue InsightSM Reports for group accounts.

Medicare

O65 Inquiry

This role allows Delegates to access MAPD, PDP and Medicare Supplement information via BAP. Delegates can view Incomplete Applications, Submitted Applications and Membership information. Delegates do not have access to complete or submit applications. They can only view which apps require action.

Roles	
Online Group Quoting ☐ Quote, Enrollment ☐ BlueTrack ☐ Request Center	Blue Access for EmployersSM (BAE) ☐ Inquiry and Group Secure Messaging ☐ Maintenance and Group Secure Messaging ☐ Group Secure Messaging
Reports ☐ Reports	Commission Statements ☐ Callidus Reports & PDFs
Medicare ☐ O65 Inquiry	

Blue Access for EmployersSM

Inquiry and Group Secure Messaging

This role allows Delegates to access inquiry functions for BAESM and the Membership Message Center.

The Membership Message Center improves and streamlines membership-related communications and protects those communications with added security for sending inquiries and preventing unauthorized access.

Maintenance and Group Secure Messaging

This role allows Delegates to access BAE maintenance functions and the Membership Message Center.

Group Secure Messaging

This role allows Delegates to access the Membership Message Center.

Commission Statements

Callidus Reports and PDFs

Access to the Callidus Portal to view, access and download commissions data, reports and PDFs.

Email Confirmation

As soon as you successfully add your delegates, they will receive a welcome email asking for email address confirmation.

After the delegate clicks on “Confirm Your Email Address” link, they will see a “Verification Complete!” message with a link to log in to BAP.

Delegates can click on the “Producer Log In or Sign Up” link at the top of the page to complete the registration process.

Delegates must have the User ID and temporary Password the Primary account user created to complete the registration process.

If your Delegates fail to confirm/verify their email address, we will send them a new confirmation email the first time they try to log in to BAP.

Initial Login for Delegates

The first time a delegate logs into BAP with the User ID and Password created by the primary user, they step through an initial login process.

- Agrees to Terms & Conditions
- Chooses a Security Question and answer
- Creates a new password

After these steps, the delegate logs into BAP with their new password.

Note: Producers can use the log in button at the top of every page of our public websites to log in to BAP. Simply click on the log in button and select “Producer Log In or Sign Up.”

Your Account Information

Hello,

Thank you for starting the registration process for Blue Access for Producers, a valuable online tool to help you grow your business, save time and serve your clients.

To complete your registration, you'll need to confirm your email address. Please use the link below to confirm your email address:

[Confirm Your Email Address](#)

Blue Access for Producers gives you instant access to these and other features:

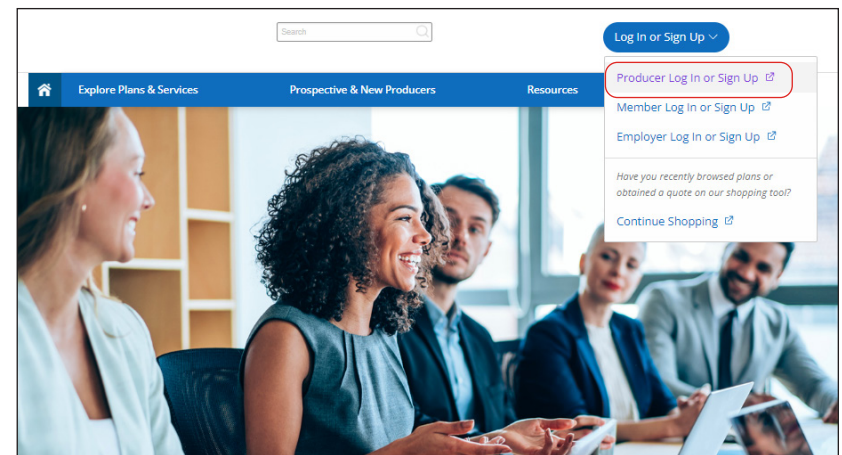
- View employer information
- Generate online quotes and process enrollments
- Access commission statements
- Obtain product information and forms and keep up to date on news and regulatory updates

When you access the site for the first time, you'll be prompted to create a new password. To protect your information, do not share your user ID or password with anyone.

Note: DO NOT REPLY TO THIS EMAIL. If you did not request this change, or if you believe you have received this email in error, please call our Internet Help Desk at [1-888-706-0583](tel:1-888-706-0583).

Verification Complete!

You have successfully verified your email address.
You can proceed to [log in](#).



Reviewing Delegate Profiles

Primary account users who manage delegates should review those profiles often. Through Password Manager, you can:

- Add a new delegate
- Revoke access for a delegate
- Re-activate a delegate whose access was revoked
- Change a delegate's role(s)

[Producer Services](#) [Password Manager](#) [User Profile](#) [Logout](#)

[Home](#) > [Password Manager](#)

 **PASSWORD MANAGER**

[New Delegate](#)

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- ☒ Reports

Commission Statements

- ☒ Callidus Reports & PDFs

Medicare

- ☒ O65 Inquiry

[SAVE](#) [REVOKE ACCESS](#) [CANCEL](#)

Delegate Contact Information

Delegates can now view and edit their contact information if it's out of date. On a regular basis, ask your delegates to:

- Review their contact information.
- Confirm that it's up-to-date.
- Make sure they can access their email during BAP logins to retrieve the one-time passcode needed for two-step login.
- Add/Review their Mobile Number if they want to receive via text message the one-time passcode needed for two-step login.

Technical Support

Here's how to contact our Help Desk for Blue Access for Producers and Employers. The Help Desk must verify the user calling before they can assist you. They use the contact information in your User Profile to verify you. If calling on behalf of an agency, the caller must be the agency-designated Principal.

Internet Help Desk:

888-706-0583

Monday – Friday: 7 a.m. - 10 p.m. CT

Saturday: 7 a.m. – 3:30 p.m. CT

The screenshot displays the 'User Profile' page. At the top right, there are links for 'Producer Services', 'User Profile', and 'Logout'. The main header area shows 'Welcome, MARY JONES' and 'Home > Profile'. Below this, the user's company is listed as 'ABC AGENCY' and their producer number as '123456789'. The profile section is titled 'PROFILE' and includes a 'Change Contact Information' form with fields for Name (JOHN ROBINSON), Phone ((123) 123-1234), Mobile, and Email (john_robinson@abcagency.com), with an 'EDIT' button. Below this is a 'Change Password' form with fields for Producer Number (123456789.JohnRobinson) and Password (masked with dots), also with an 'EDIT' button. On the left sidebar, there are links for 'Request Assistance', 'Expiring Request Tickets', and 'Change Security Information'. At the bottom of the sidebar is the 'Technical Help Desk' contact information: 1-888-706-0583, with hours of operation for Monday-Friday (7 a.m. - 10 p.m. CT) and Saturday (7 a.m. - 3:30 p.m. CT).

In this example above, John Robinson is a Delegate for Mary Jones at ABC Agency. Mary's Producer ID Number and BAP User ID is **123456789**. John's Producer ID Number and his BAP User ID is **123456789.JohnRobinson**.

John can edit his phone number, add his mobile number, change his email address, and change his password. John CAN'T change his name, his Producer ID Number or any information about the Primary BAP account holder, Mary Jones. He also can't change his assigned roles.