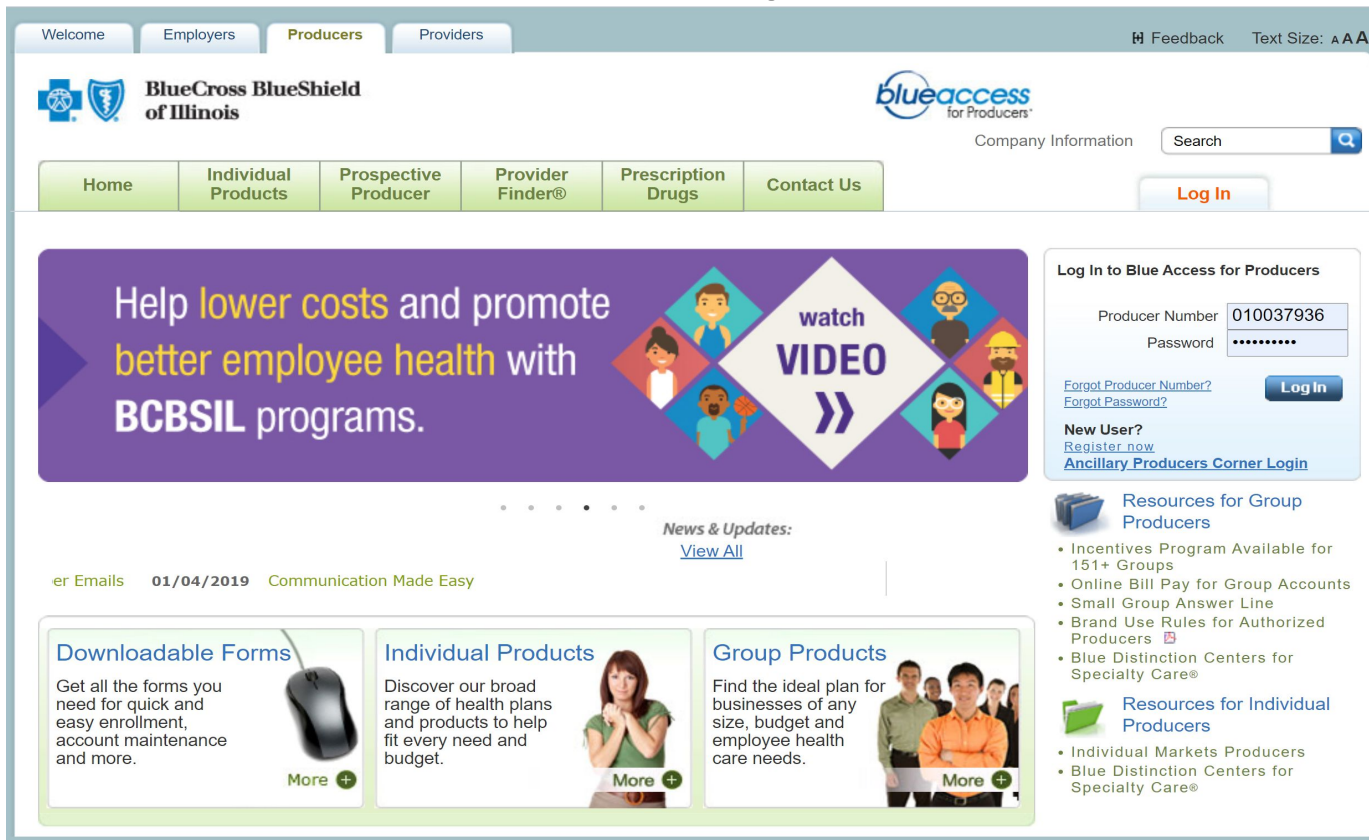


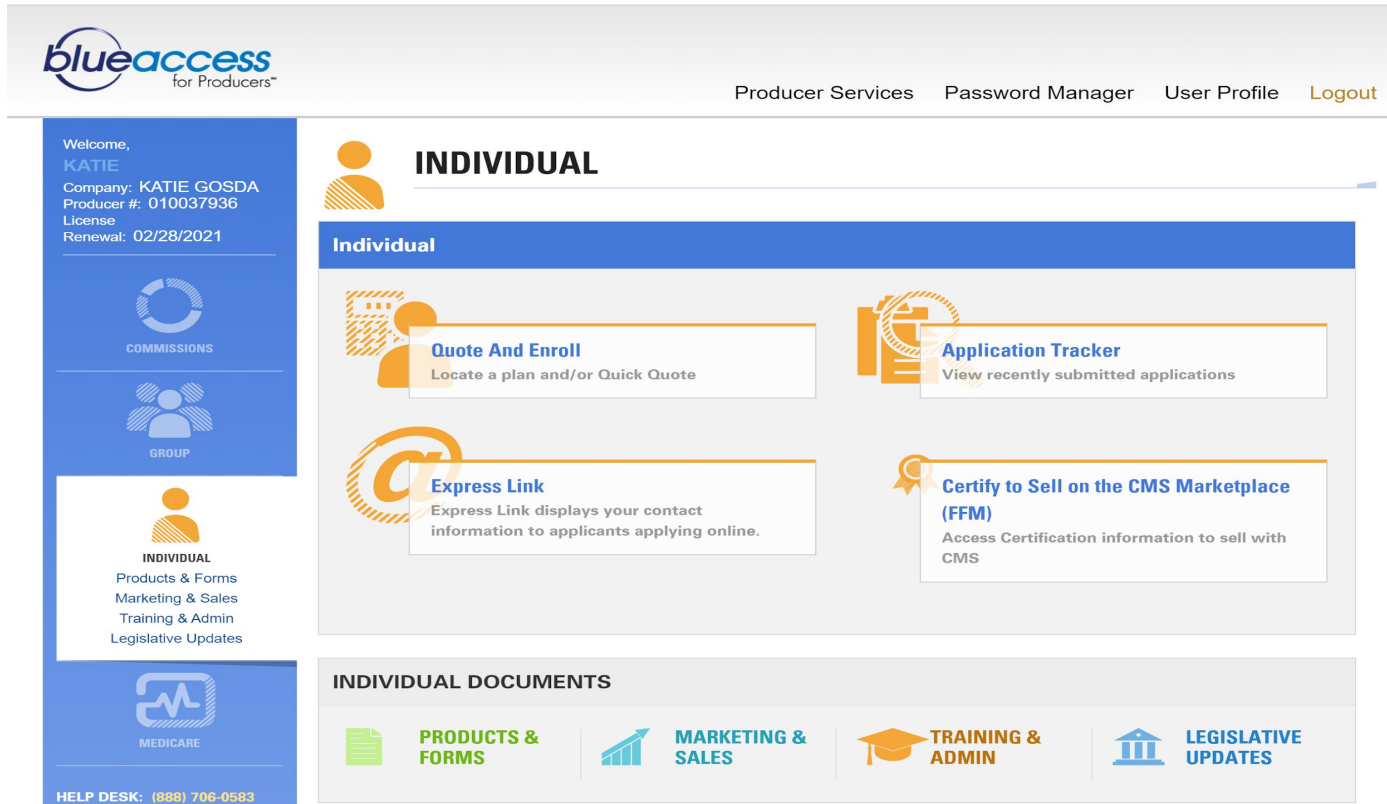
# SPECIAL ENROLLMENT PERIOD TRAINING GUIDE

Go to [bcbsil.com](http://bcbsil.com) and choose “Producers” in the top left corner. Input your Agent Producer Number and Password.  
**\*Do not use the AGENCY producer number\***



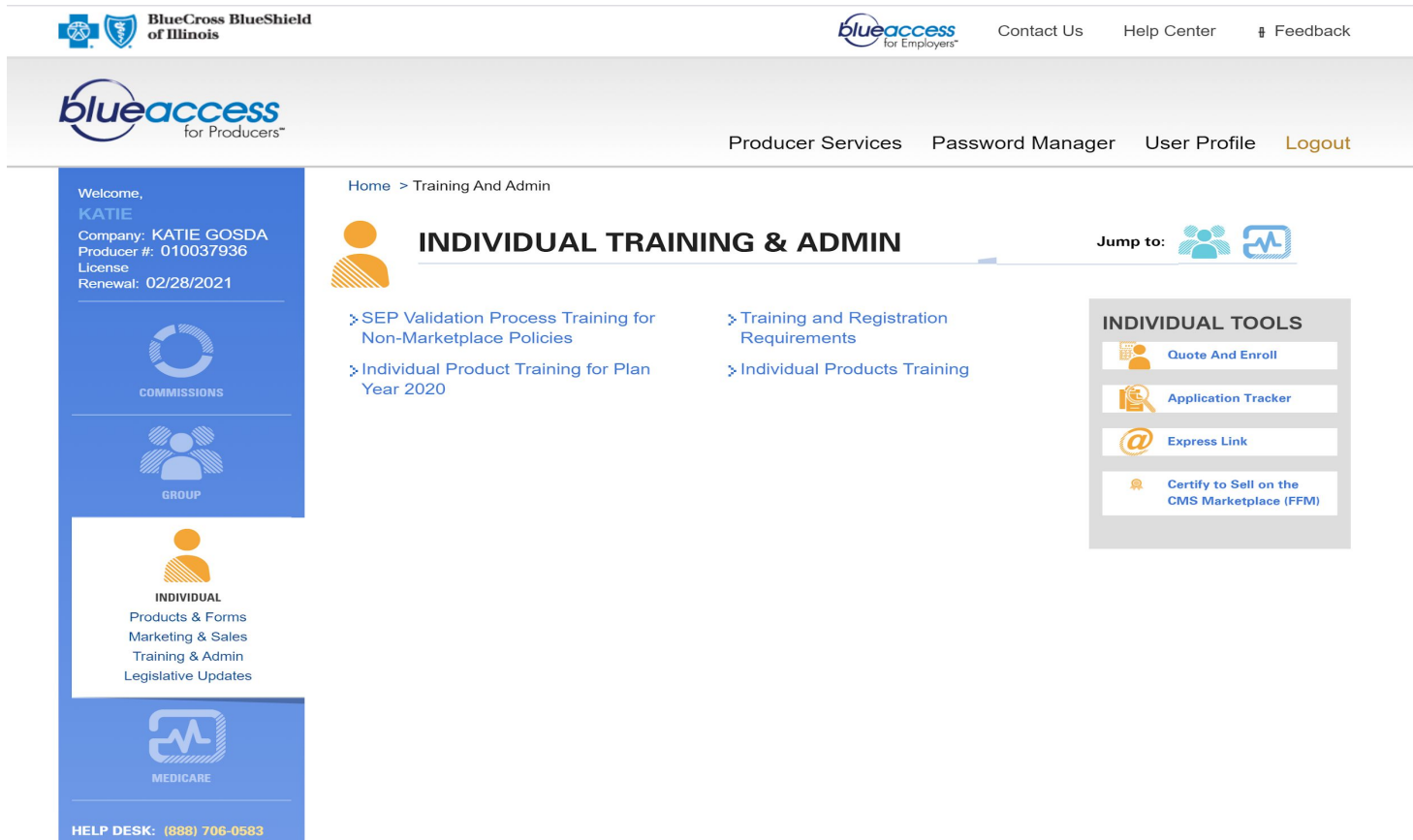
The screenshot shows the website interface for BlueCross BlueShield of Illinois, specifically the 'Producers' section. The navigation bar includes 'Welcome', 'Employers', 'Producers', and 'Providers'. The main header features the BlueCross BlueShield of Illinois logo and the 'blueaccess for Producers' logo. A search bar is present with the text 'Company Information' and a search icon. Below the header is a menu with 'Home', 'Individual Products', 'Prospective Producer', 'Provider Finder®', 'Prescription Drugs', and 'Contact Us'. A 'Log In' button is also visible. The main content area features a large purple banner with the text 'Help lower costs and promote better employee health with BCBSIL programs.' and a 'watch VIDEO' button. To the right is a login form for 'Log In to Blue Access for Producers' with fields for 'Producer Number' (010037936) and 'Password' (masked with dots), and a 'Log In' button. Below the login form are links for 'Forgot Producer Number?', 'Forgot Password?', 'New User?', 'Register now', and 'Ancillary Producers Corner Login'. A 'Resources for Group Producers' section lists several services: Incentives Program Available for 151+ Groups, Online Bill Pay for Group Accounts, Small Group Answer Line, Brand Use Rules for Authorized Producers, and Blue Distinction Centers for Specialty Care®. Below this is a 'Resources for Individual Producers' section listing Individual Markets Producers and Blue Distinction Centers for Specialty Care®. At the bottom, there are three promotional boxes: 'Downloadable Forms' (Get all the forms you need for quick and easy enrollment, account maintenance and more.), 'Individual Products' (Discover our broad range of health plans and products to help fit every need and budget.), and 'Group Products' (Find the ideal plan for businesses of any size, budget and employee health care needs.). Each box has a 'More +' button.

On the left-hand side of the screen, choose “Individual”. Once in the Individual screen, click on Training and Admin under the Individual Documents section.



The screenshot shows the user interface for 'blueaccess for Producers™'. At the top right, there are navigation links: 'Producer Services', 'Password Manager', 'User Profile', and 'Logout'. On the left side, a vertical menu contains several options: 'COMMISSIONS', 'GROUP', 'INDIVIDUAL' (which is highlighted), and 'MEDICARE'. The 'INDIVIDUAL' section is expanded, showing a list of sub-options: 'Products & Forms', 'Marketing & Sales', 'Training & Admin', and 'Legislative Updates'. Below this menu, there are four main action cards: 'Quote And Enroll' (Locate a plan and/or Quick Quote), 'Application Tracker' (View recently submitted applications), 'Express Link' (Express Link displays your contact information to applicants applying online), and 'Certify to Sell on the CMS Marketplace (FFM)' (Access Certification information to sell with CMS). At the bottom, there is a section titled 'INDIVIDUAL DOCUMENTS' with four icons and labels: 'PRODUCTS & FORMS', 'MARKETING & SALES', 'TRAINING & ADMIN', and 'LEGISLATIVE UPDATES'. The top left of the interface displays a welcome message for 'KATIE' with her company name 'KATIE GOSDA', producer number '010037936', license information, and renewal date '02/28/2021'. A help desk number '(888) 706-0583' is located at the bottom left.

# Under Individual Training & Admin: Select SEP Validation Process Training for Non-Marketplace Policies



BlueCross BlueShield of Illinois

blueaccess for Employers™ Contact Us Help Center Feedback



blueaccess for Producers™

Producer Services Password Manager User Profile Logout

Welcome, **KATIE**  
Company: KATIE GOSDA  
Producer #: 010037936  
License  
Renewal: 02/28/2021





Home > Training And Admin

**INDIVIDUAL TRAINING & ADMIN**

Jump to:  

- > SEP Validation Process Training for Non-Marketplace Policies
- > Training and Registration Requirements
- > Individual Product Training for Plan Year 2020
- > Individual Products Training

**INDIVIDUAL TOOLS**

-  Quote And Enroll
-  Application Tracker
-  Express Link
-  Certify to Sell on the CMS Marketplace (FFM)

**COMMISSIONS**

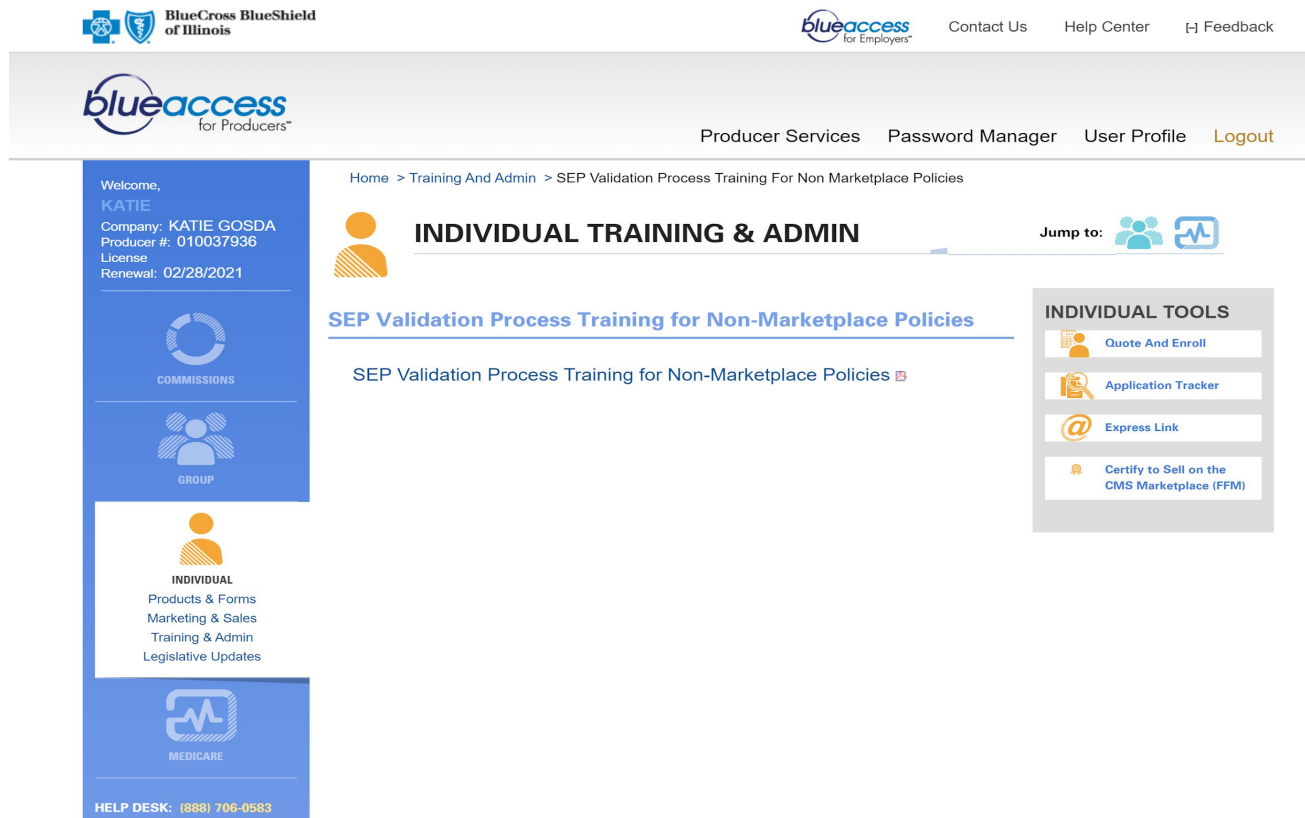
**GROUP**

**INDIVIDUAL**  
Products & Forms  
Marketing & Sales  
Training & Admin  
Legislative Updates

**MEDICARE**

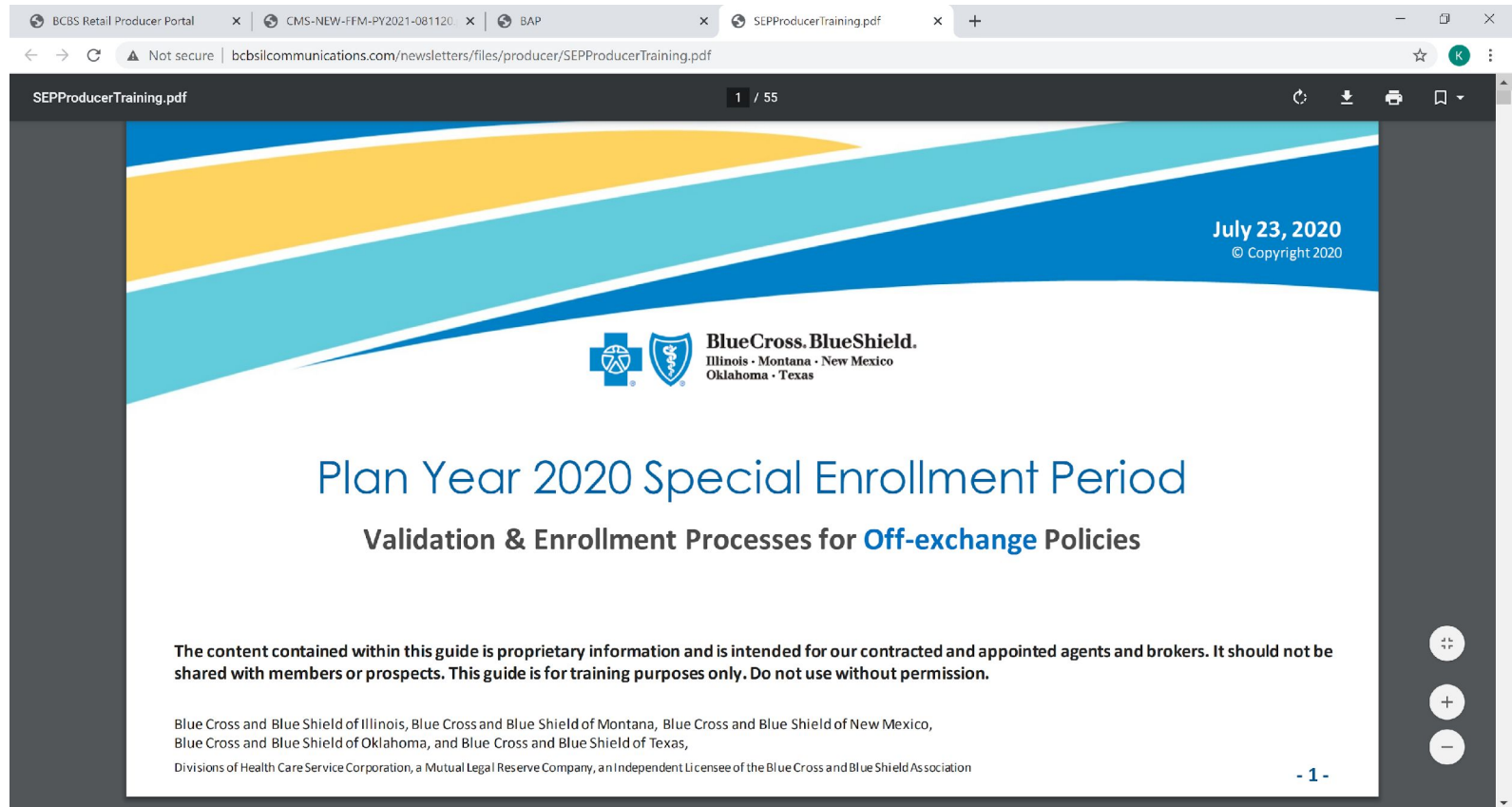
HELP DESK: (888) 706-0583

# Select the clickable title “SEP Validation Process Training for Non-Marketplace Policies”



The screenshot shows the user interface of the blueaccess for Producers website. At the top left is the BlueCross BlueShield of Illinois logo. At the top right are links for Contact Us, Help Center, and Feedback. Below this is the blueaccess for Producers logo and a navigation bar with links for Producer Services, Password Manager, User Profile, and Logout. The main content area shows a breadcrumb trail: Home > Training And Admin > SEP Validation Process Training For Non Marketplace Policies. A user profile sidebar on the left displays the name KATIE, company KATIE GOSDA, producer number 010037936, license information, and renewal date 02/28/2021. Below this are icons for COMMISSIONS, GROUP, INDIVIDUAL (with sub-links for Products & Forms, Marketing & Sales, Training & Admin, and Legislative Updates), and MEDICARE. At the bottom of the sidebar is the HELP DESK number (888) 706-0583. The main content area features a section titled INDIVIDUAL TRAINING & ADMIN with a 'Jump to:' dropdown menu. Below this is a link for SEP Validation Process Training for Non-Marketplace Policies. To the right is a sidebar titled INDIVIDUAL TOOLS with links for Quote And Enroll, Application Tracker, Express Link, and Certify to Sell on the CMS Marketplace (FFM).

# Read through the Plan Year 2020 Special Enrollment Period Validation & Enrollment Process for Off-Exchange Policies presentation.




The screenshot shows a web browser displaying a PDF document. The browser's address bar shows the URL: [bcbsilcommunications.com/newsletters/files/producer/SEPProducerTraining.pdf](https://bcbsilcommunications.com/newsletters/files/producer/SEPProducerTraining.pdf). The PDF viewer interface includes a title bar with 'SEPProducerTraining.pdf' and a page indicator '1 / 55'. The slide content features a decorative header with yellow and blue wavy shapes. The date 'July 23, 2020' and '© Copyright 2020' are in the top right. The BlueCross BlueShield logo is centered, with text below it: 'BlueCross. BlueShield. Illinois · Montana · New Mexico Oklahoma · Texas'. The main title is 'Plan Year 2020 Special Enrollment Period Validation & Enrollment Processes for Off-exchange Policies'. A disclaimer states: 'The content contained within this guide is proprietary information and is intended for our contracted and appointed agents and brokers. It should not be shared with members or prospects. This guide is for training purposes only. Do not use without permission.' At the bottom, it lists the various Blue Cross and Blue Shield entities and identifies the document as a Mutual Legal Reserve Company. The page number '- 1 -' is in the bottom right corner.

BCBS Retail Producer Portal x CMS-NEW-FFM-PY2021-081120 x BAP x SEPProducerTraining.pdf x +

Not secure | bcbsilcommunications.com/newsletters/files/producer/SEPProducerTraining.pdf

SEPProducerTraining.pdf 1 / 55

July 23, 2020  
© Copyright 2020

 **BlueCross. BlueShield.**  
Illinois · Montana · New Mexico  
Oklahoma · Texas

## Plan Year 2020 Special Enrollment Period Validation & Enrollment Processes for Off-exchange Policies

The content contained within this guide is proprietary information and is intended for our contracted and appointed agents and brokers. It should not be shared with members or prospects. This guide is for training purposes only. Do not use without permission.

Blue Cross and Blue Shield of Illinois, Blue Cross and Blue Shield of Montana, Blue Cross and Blue Shield of New Mexico, Blue Cross and Blue Shield of Oklahoma, and Blue Cross and Blue Shield of Texas,  
Divisions of Health Care Service Corporation, a Mutual Legal Reserve Company, an Independent Licensee of the Blue Cross and Blue Shield Association

- 1 -

To affirm your training, go back to the main BlueAccess for Producers page and select “Producer Services” on the top bar. Under this section, click “SEP Training Affirmation”



[Contact Us](#)

[Help Center](#)

[Feedback](#)



[Producer Services](#)

[Password Manager](#)

[User Profile](#)

[Logout](#)

Welcome,  
**KATIE**  
Company: KATIE GOSDA  
Producer #: 010037936  
License  
Renewal: 02/28/2021

[Home](#) > [Request Assistance](#)



## Request Assistance

### Request Assistance

You can submit your request by selecting from the list of options below.

- > [Submit a Commission Inquiry](#)
- > [Update my producer of record \(POR\)](#)
- > [Update my Electronic Funds Transfer \(EFT\) info](#)
- > [Update my contact info](#)
- > [Book of Business Transfer Request](#)
- > [Update my Blue Access for Producers password](#)
- > [Update my challenge question](#)
- > [Update my E&O Coverage](#)
- > [SEP Training Affirmation](#)

Please note, if you need to update the information below, it will require a phone call to the Producer Service Center at (855) 782-4272.

- Name
- TAX ID
- Social Security Number
- Producer ID

**HELP DESK: (888) 706-0583**


Weekday Hours:  
Mon-Fri 7:00 a.m.-10:00 p.m.  
(CST)

Weekend Hours:


Read through the SEP Training Affirmation to confirm that you have completed the required SEP training. If you have done so, click Submit.

Welcome,  
**KATIE**  
Company: KATIE GOSDA  
Producer #: 010037936  
License  
Renewal: 02/28/2021


Home > Request Assistance > SEP Training Affirmation




## Request Assistance




Request Assistance



Existing Request Tickets



User Profile



Password Manager

**HELP DESK: (888) 706-0583**  
Weekday Hours:  
Mon-Fri 7:00 a.m.-10:00 p.m.  
(CST)  
Weekend Hours:  
Sat 7:00 a.m.-3:30 p.m. (CST)

### SEP Training Affirmation

Confirm that you completed the required SEP training by submitting this affirmation form.

This Special Enrollment Period (SEP) training is for Producers associated with Health Care Service Corporation, a Mutual Legal Reserve Company ("HCSC"), which operates through its Blue Cross and Blue Shield of Illinois, Blue Cross and Blue Shield of Montana, Blue Cross and Blue Shield of New Mexico, Blue Cross and Blue Shield of Oklahoma and Blue Cross and Blue Shield of Texas divisions, (each a "BCBS Plan").

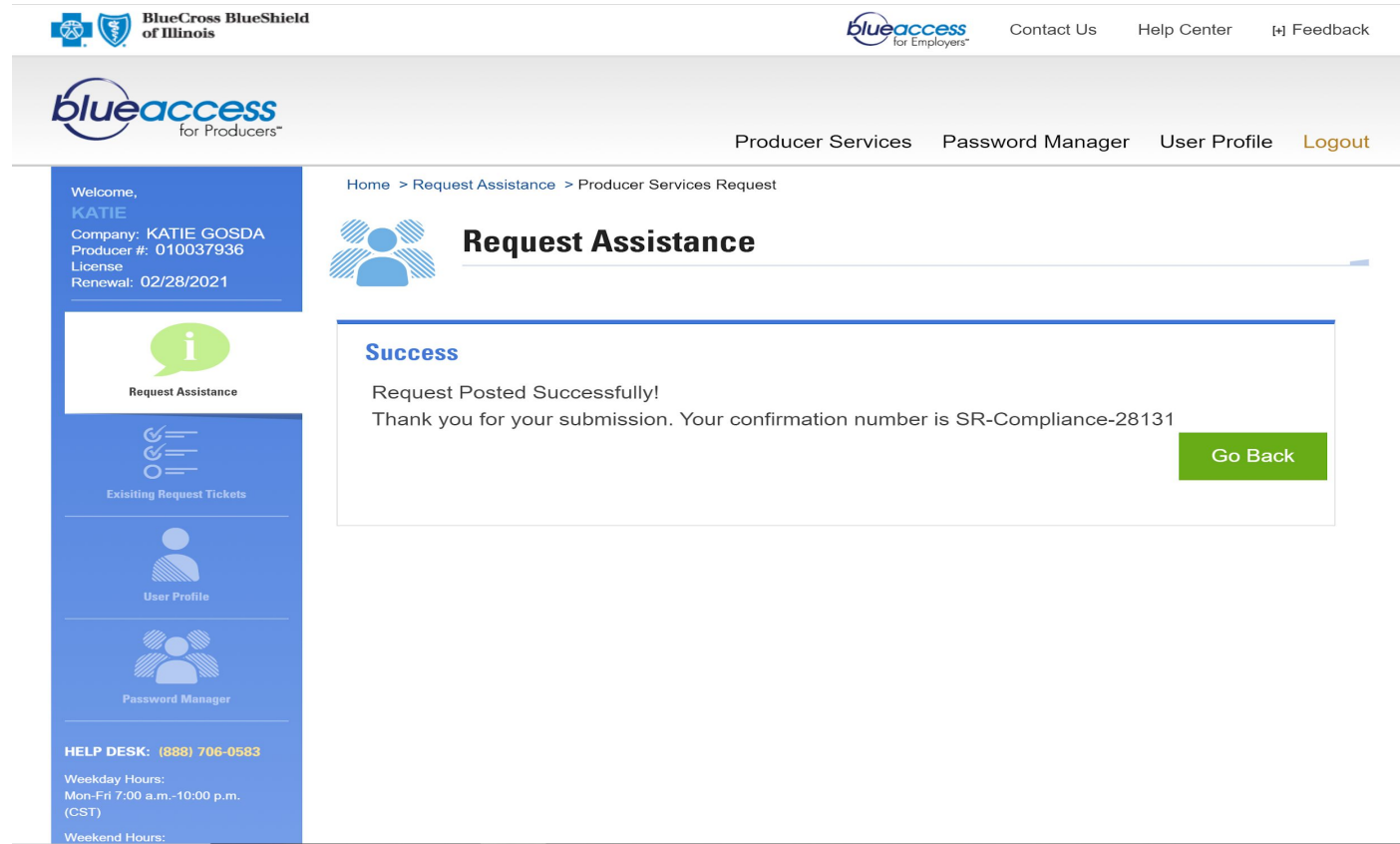
By submitting this document, the Agent/Producer affirms that he or she has fully reviewed and completed the Special Enrollment Period training for individual business and understands this requirement is exclusive to HCSC and does not substitute for and is in addition to the Federally Facilitated Marketplace (On Exchange) training administered by the Centers for Medicare and Medicaid Services (CMS).

The Agent/Producer understands the affirmation submitted is recorded by National Producer Number (NPN) instead of individual writing agent number, and will therefore be reflected for each applicable HCSC division ("BCBS Plan") in which he or she is actively selling. When the producer affirms, the affirmation applies to all states in which the producer is contracted and/or appointed.

[Cancel](#) [Submit](#)



If your submission goes through, you will receive the below message of “Success” and you’re ready to sell SEP policies!



The screenshot shows the user interface of the blueaccess for Producers website. At the top, there are logos for BlueCross BlueShield of Illinois and blueaccess for Employers, along with navigation links for Contact Us, Help Center, and Feedback. Below this is a header for blueaccess for Producers with navigation links for Producer Services, Password Manager, User Profile, and Logout. The main content area is titled "Request Assistance" and displays a "Success" message: "Request Posted Successfully! Thank you for your submission. Your confirmation number is SR-Compliance-28131". A green "Go Back" button is located to the right of the message. On the left side, there is a sidebar with a welcome message for KATIE, company information (KATIE GOSDA, Producer #: 010037936, License, Renewal: 02/28/2021), and navigation options for Request Assistance, Existing Request Tickets, User Profile, and Password Manager. At the bottom of the sidebar, there is a HELP DESK contact number (888) 706-0583 and operating hours (Weekday Hours: Mon-Fri 7:00 a.m.-10:00 p.m. (CST); Weekend Hours:).