

# Broker Certification Site



June 17, 2024 Y0118\_24\_304A\_C 06172024 H2819\_24\_304A\_C 06172024



Agents must be certified each year to sell Blue Shield of California MAPD & PDP plans and be individually appointed by Blue Shield or endorsed by an Agency appointed by Blue Shield to receive renewal commissions. MAPD and PDP plan commissions are subject to the Centers for Medicare and Medicaid Services (CMS) guidelines, which are subject to change.

- The Blue Shield of California Plan Medicare Online Certification site makes it simple to register and take the certification.
- Agents must pass the Certification assessment. You are allowed 4 attempts to pass the assessment before you are locked out of the system.
- Agents must be appointed or must be affiliated with an appointed agency in addition to completing the Certification.

#### Don't forget:

• You're required to pass both the AHIP Certification and Blue Shield's 2025 product-specific training to be ready to sell.

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### What's Changing?

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### What's Changing for this year

Updated Navigation to:

- Quickly access certification materials and FAQ.
- Easily check your certification status.

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Medicare Product Online Certification

FAQ User Guide Certfication Status Agency/Profile Update





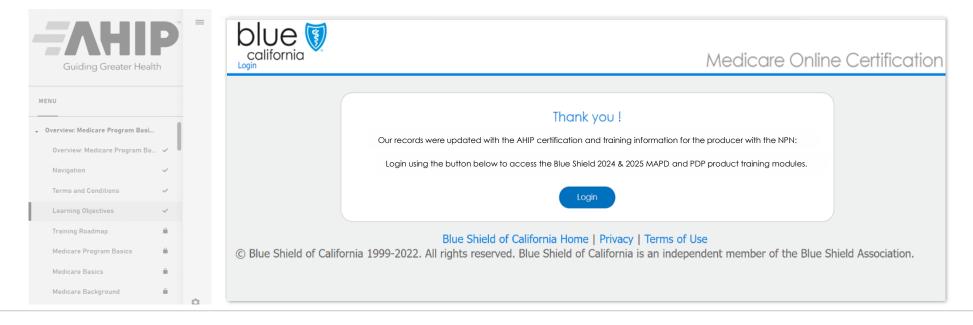
### AHIP Completion

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- <u>Click here</u> to be taken to the AHIP Training Producers site and follow the steps below to complete your AHIP and Blue Shield Certifications:
  - 1. Pass the AHIP Annual Training.
  - 2. Transmit your results to Blue Shield
    - Please note that the transmission from AHIP may take up to 24 hours for Blue Shield to receive.





### Login to the Certification Site

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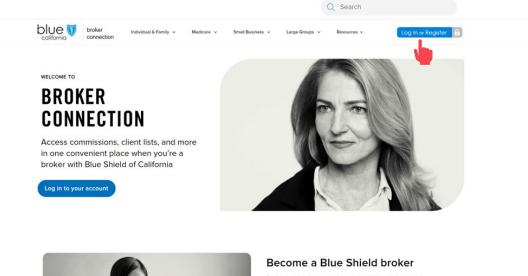
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### Login from Broker Connection Site

#### **Step 01**:

Navigate to the Broker Connection site and click Log In or Register





Brokers make the most of our competitive products and commissions, as well as the overall value we add to their business. Our online appointment process now makes becoming a Blue Shield of California broker easier than ever.

Join us and watch your business grow.



#### **Step 02:**

Enter credentials and click Login

• You must login to access the Certification Site.

Nelcome to Broker Connection	
.og in	Create an account
Q Username	Already appointed with Blue Shield? It takes about 5 minutes and 6 quick steps to register as an agency owner or Broker Connection.
> Pessword Shaw (1)	Register
Remember my username	To register you need:
	The tax ID number for your brokerage or your personal tax ID number
Login	Your Department of Insurance (DOI) license number     A National Producer Number (NPN), if you have one
	<ul> <li>A National Producer Number (NPN), Il you have one</li> </ul>
rgat your the ord?	Who can create an account?
rgot your username?	Get appointed with Blue Shield
	() This page cannot be bookmarked. See instructions for how to bookmark this page berg.

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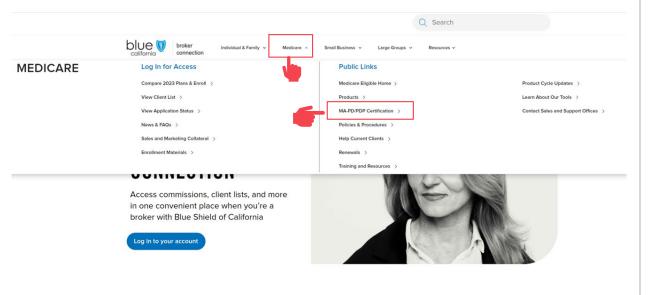
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### Login to the Certification portal

#### **Step 03**:

Click the Medicare dropdown menu and select MA-PD/PDP Certification from the menu.



#### Step 04:

#### Click the link to login to the Certification portal.

#### MA-PD and PDP certification

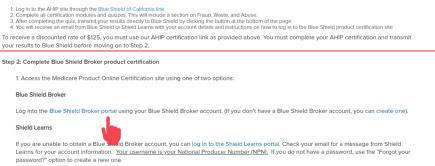
To sell Medicare Advantage Prescription Drug (MA-PD) and Prescription Drug (PDP) plans, agents need to complete their America's Health Insurance Plans (AHIP) certification. Insurers require AHIP certification to ensure that broker and agents are compliant with the Centers for Medicare & Medicaid Services (CMS) guidelines and regulations.

Per CMS guidelines, all independent agents who contact Medicare beneficiaries about MA-PD or PDP products must be trained and tested on Medicare compliance, specific health plan benefits and procedures, and CMS marketing requirements.

If you were certified last year, you must renew your certification again this year prior to January 1 of the new year in order to receive renewal commission on your active book of business. To sell Blue Shield MA-PD or PDP products, you must be AHIP-certified and Blue Shield product-certified, If you are not certified to sell Blue Shield SMA-PD or PDP plans, we cannot, by Jaw, pay you commissions on that business.

#### Steps to complete your annual AHIP and Blue Shield Product Certification

#### Step 1: Complete AHIP certification



2. Complete the MA-PD/PDP product certification. You'll have 4 attempts to pass. To pass, you'll need a score of 85% or higher.

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### If you do NOT have a Broker Connection Account

AHIP

#### **Step 03:**

#### Click the link to login to the Shield Learns portal.

#### MA-PD and PDP certification

To sell Medicare Advantage Prescription Drug (MA-PD) and Prescription Drug (PDP) plans, agents need to complete their America's Health Insurance Plans (AHIP) certification. Insurers require AHIP certification to ensure that broker and agents are compliant with the Centers for Medicare & Medicaid Services (CMS) guidelines and regulations.

Per CMS guidelines, all independent agents who contact Medicare beneficiaries about MA-PD or PDP products must be trained and tested on Medicare compliance, specific health plan benefits and procedures, and CMS marketing requirements.

If you were certified last year, you must renew your certification again this year prior to January 1 of the new year in order to receive renewal commission on your active book of business. To sell Blue Shield MA-PD or PDP products, you must be AHIP-certified and Blue Shield product-certified. If you are not certified to sell Blue Shields MA-PD or PDP plans, we cannot, by Jaw, pay you commissions on that business.

Steps to complete your annual AHIP and Blue Shield Product Certification

#### Step 1: Complete AHIP certification

1. Log in to the AHI<sup>II</sup> set through the Blue Shield of California link
 2. Complete all certification moles and quizzers. This will include a section on Fraud, Waste, and Abuse.
 3. After completing the quiz, transmit your results directly to Blue Shield by clicking the button at the bottom of the page
 4. You will receive an email from Blue Shield or Shield Learns with your account details and instructions on how to log in to the Blue Shield product certification site
 To receive a discounted rate of \$125, you must use our AHIP certification link as provided above. You must complete your AHIP certification and transmit
 your results to Blue Shield Broker product certification
 Step 2: Complete Blue Shield Broker product certification

1. Access the Medicare Product Online Certification site using one of two options:

#### Blue Shield Broker

Log into the Blue Shield Broker portal using your Blue Shield Broker account. (If you don't have a Blue Shield Broker account, you can create one)

Shield Learns

If you are unable to obtain a Blue Shield Broker account, you can log in to the Shield Learns portal. Check your email for a message from Shield Learns for your account information. <u>Your username is your National Producer Number</u> (NEN), If you do not have a password, use the "Forgot your password" option to create a new one.

2. Complete the MA-PD/PDP product certification. You'll have 4 attempts to pass. To pass, you'll need a score of 85% or higher

#### **Step 04:**

Use your National Producer Number (NPN) as the username and click the Forgot Password to create an account.

Please note this process may take up to 15 minutes for you to receive the reset email to complete the process.







### Profile Updates

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### Updating your Agency Affiliation and/or Contact Information

Please complete the steps in this section if you are a:

- Newly appointed broker with Blue Shield of California.
- Returning broker and require profile updates:
  - Last Name
  - Phone
  - Email
- Returning broker that has changed agencies.



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# Updating your Agency Affiliation and/or Contact Information

#### **Step: 01**

To update your information, click the Agency/Profile Update link on the navigation bar.

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Medicare Product Online Certification

FAQ User Guide Certfication Status Agency/Profile Update

Thank you for your interest in selling Blue Shield of California's NAPD and/or PDP plans! Before getting started, **you must have already completed the** AHIP Medicare Compliance certification. If you're ready, please continue through the steps below.

### BSC Medicare Product Online Certification Profile Update Form

This is the profile update request form for the BSC Medicare Product Online Certification site.

If you are a brand new broker, please fill out what agency (or agencies) you are affiliated with, if applicable.

If you are a returning broker and require profile updates, please request by filling out the appropriate box. If you have changed agencies, please identify what agency you are changing from. If you do not need to make any updates for a particular field, you can leave it blank.

Changes may take 1-2 business days to be reflected in your account.

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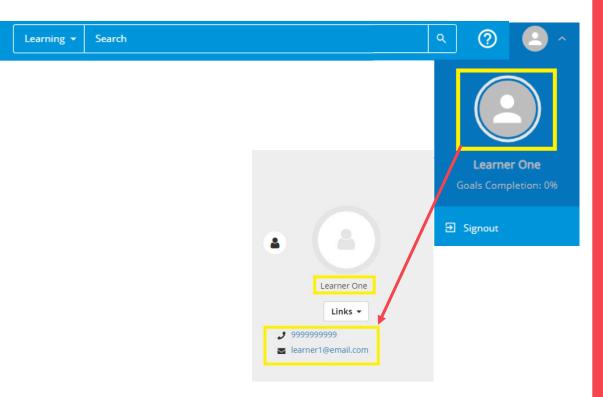
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### **Check your Contact Information**

#### **Step 02:**

Before begin the certification process, please verify your contact information by clicking on the Profile Icon at the top right of the screen.





### **Certification Training**

□ Training Course

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### **Certification Training**

#### **Step 01**:

To view the MAPD and PDP Training Course, click the image.



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Thank you for your interest in selling Blue Shield of California's MAPD and/or PDP plans! Before getting started, **you must have already completed the AHIP Medicare Compliance certification**. If you're ready, please continue through the steps below.





#### Accessibility Statement for Individuals with Disabilities At Blue Shield of California, we are committed to ensuring our applications are accessible to individuals with disabilities

If you need assistance using our certification application, we can help you.

Please email us at producer.services@blueshieldca.com or call us toll-free at 800-559-5905 / TTY: 711.

#### **Step 02:**

To begin the course, click the Start button.

• You can download the training slides by clicking the link.

DETAILS	ACTIVITIES SIMILAR ACTIVITIES
	Description
▼ Full	Description
Direc	tions
Dire	tions
Direc	itions D <u>ownload Training Slides</u> Check your computer's "Download" Folder after clicking link.
1.	Download Training Slides. Check your computer's "Download" Folder after clicking link.
1. 2.	Download Training Slides. Check your computer's "Download" Folder after clicking link. Click "Start" in the top right corner to begin training course. The course will open in a new window.
1. 2. 3.	Download Training Slides. Check your computer's "Download" Folder after clicking link. Click "Start" in the top right corner to begin training course. The course will open in a new window. Close the training course window when completed.

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tion Site Profile Updates

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### **Certification Training**

#### **Step 03:**

#### Click next to continue.

SumTotal - Work - Microsoft Edge			- 2
http://blueshieldca.stage.sumtotal.host/learning/app/experience/ACP_Start.aspx?ViewMode=1&ViewSubMode=0&PackageId=(E3DBCSEC-FE19	468C-9422-9AB6835932A7)&Attemp	9	9
ANNUAL MEDICARE CERTIFICATION			
LEARNING ACTIVITY DETAILS			
Directions:			
Thank you for attending the Blue Shield Annual Certification Training.			
This training presentation is intended for use by licensed agents to understand the basics of Medicare (MAPD) plans, Prescription Drug Plans (PDP), and Medicare Supplement plans offered by Blue Shield 2025. When making presentations, agents must rely upon the plan's Summary of Benefits, formulary, directories and other plan documentation to address the specific needs of each prospective member.	of California for Cycle Ye	0	
Information contained in this document regarding 2025 plan service areas, benefits, costs, etc. is confit the public on October 1, 2024. Distribution to consumers, other insurers, or any other person or compa comply with this requirement will result in the loss of appointment with Blue Shield of California on all li a civil monetary judgment.	ny is strictly prohibited. F	ailure	
NAKT CANCEL			

#### **Step 04:**

#### To begin the course, click the Start button.



cation Site Profile Updates

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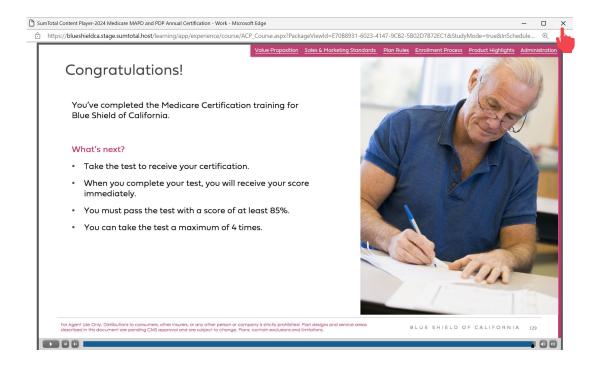
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### **Certification Training**

#### **Step 05:**

Exit the course when you are done by closing the window.



#### **Step 06:**

Return to the Home Screen by click the icon on the side navigation bar.

Hon Library	٦٦	COURSE ANNUAL MEDICARE CERTIFICATION TRAINING ATTENDED
	Attempt History	
	Annual Medicare Certification Train	DETAILS ACTIVITIES SIMILAR ACTIVITIES
		Full Description         Directions         1       Download Training Sides Check your computer's 'Download' Folder after clicking link.         2. Click 'Sart' in the top right corner to begin training course. The course will open in a new window.         3. Click 'Sart' in the top right corner to begin training course. The course will open in a new window.         4. Return to the homepage by clicking the 'Home' button in the top-left corner.         5. Thank you for attending the Blue Shield 2025 Annual Certification Training.         This training presentation is intended for use by licensed agents to understand the basics of Medicare Advantage Prescription Drug (MAPD) plans, presentations intended for use by licensed agents to understand the basics of Medicare Advantage Prescription Drug (MAPD) plans, presentations of each prospective member.         Information contained in this document regarding 2025 plan service areas, benefits, costs, etc. is confidential until general release to the public on October 1, 2024. Distribution to consumers, other insurers, or any other person or company is strictly prohibited. Failure to comply with this requirement will result in the loss of appointment with Blue Shield of California on all lines of business and may result in a civil monetary judgment.
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### **Certification Exam**

#### **Step 07:**

To take the MAPD and PDP Product Certification Exam, click the image.



#### **Step 08:**

#### Click the Start button to begin the exam.

QUICK ASSESSMENT	:
MAPD and PDP Certification	
♡ ◄	START
DETAILS ACTIVITIES SIMILAR ACTIVITIES	
▼ Full Description	
<ul> <li>Directions <ol> <li>Click "Start" in the top-right corner to begin the exam. When you are in the exam, click "Start" in the bottom-right corner.</li> <li>Complete the exam.</li> <li>After the "Assessment Review", close the window by clicking the large "X" in the top-right corner (NOT your browser).</li> <li>Verify your certification completion in the "Learning Activity Progress Detail" window.</li> <li>Return to the homepage by clicking the "Home" button in the top-left corner.</li> </ol></li></ul>	
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### **Certification Exam**

#### **Step 09:**

To take the MAPD and PDP Product Certification Exam, click the image.

Ful	I Description
Dir	ections
1.	Click "Start" in the top-right corner to begin the exam. When you are in the exam, click "Start" in the bottom-
	right corner.
2.	Complete the exam.
3.	After the "Assessment Review", close the window by clicking the large "X" in the top-right corner (NOT your
	browser).
4.	Verify your certification completion in the "Learning Activity Progress Detail" window.
5.	Return to the homepage by clicking the "Home" button in the top-left corner.

#### **Step 10:**

Click the Start button to start the Amendment to the Producer Agreement (Medicare).

• Agree to the Producer Agreement and click the Next button to continue.

MAPD AND PDP CERTIFICATION	×
QUESTION 1 OF 3 🗔	SUMMARY
PRODUCER AGREEMENT (1 OF 2)	CLEAR SELECTION
Click HERE to download and view the Amendment to the Producer Agreement.	
After reviewing, do you agree to the Amendment to the Producer Agreement?	
[Disclaimer: If you select "I disagree", this certification attempt will automatically fail and it will cou certification attempt limit.]	nt against your
I agree.	
○ I disagree.	
	NEXT

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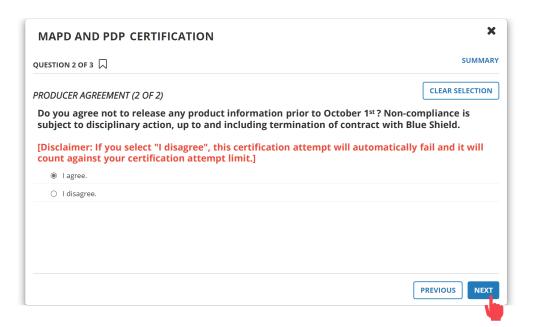
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### **Certification Exam**

#### **Step 09:**

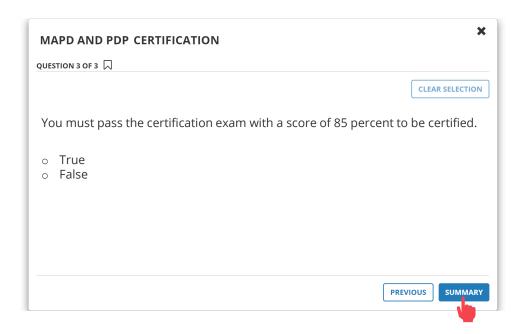
Agree to not release any product information prior to start of cycle year Annual Enrollment Period (AEP) and click Next to continue.



#### **Step 10:**

Continue to answer the question for the certification exam.

• When you are done click the Summary button.



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# **Certification Exam**

#### **Step 11**:

At the completion of the exam, review your answers.

- Use the scroll bar to move down the page.
- Download the producer agreement located on question 1.
- When you are all done reviewing, click the Submit button.

MAPD AND PDP	CERTIFICATION			
<mark>Click HERE</mark> to downlo	d and view the Amendment to	the Producer Agreeme	nt.	
After reviewing, do y	u agree to the Amendment to	the Producer Agreemen	t?	
[Disclaimer: lf you se certification attempt	ect "I disagree", this certificati limit.]	on attempt will automa	tically fail and it will cou	nt against you
I agree.				
○ I disagree.				
PRODUCER AGRE	EMENT (2 OF 2)			
	to release any product inforn inary action, up to and includi			
	u select "I disagree", this certi ur certification attempt limit.]		comatically fail and it wil	I

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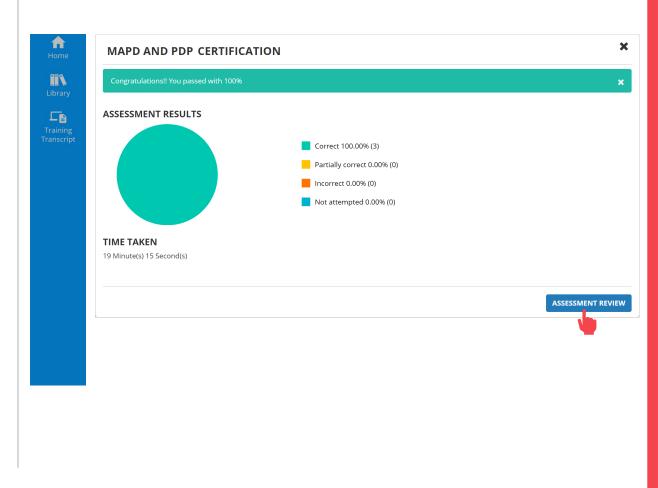
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## **Certification Exam**

### **Step 12:**

Click Assessment Review button to see which questions were missed.



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## **Certification Exam**

### **Step 13**:

Click the "x" at the top right to close the MAPD and PDP assessment review.

DEMO MAPD AND PDP 2025 CERTIFICATION		×
QUESTION 3 OF 3		
Sky is blue?		
<b>0</b> INFORMATION		
Review your Physics 101 and come back.		
✓ © Yes You got Rright.		
0 No		
O Maybe		
O Depends		
	PREVIOUS	SUMMARY GO TO RESULTS

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### **Certification Exam**

#### **Step 14:**

Click Ok to return the MAPD and PDP introduction screen to the exam.

- Above the OK button shows our certification status (example: "Passed").
- Please note that you will not receive an email confirming that you have passed and completed the certification.

GENERAL		
Content type: Quick Assessment	First launch date: Monday, June 10, 202	4 4:02:30 PM PDT
Total score: 100%	Grade: A	
Completion date: Monday, June 10, 2024 4:03:02 PM PDT	Elapsed time: Second(s): 28	
Status: Completed		
Name	Topic Status	Score %
DEMO MAPD and PDP 2025 Certification	🖾 Passed	100%
	ОК	
	· · · · · · · · · · · · · · · · · · ·	

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### **Certification Exam**

#### **Step 14:**

When you are done, click the Home icon on the side navigation bar.

Hom Library	QUICK ASSESSMENT MAPD and PDP Certification	:
Training Transcript	DETAILS     ACTIVITIES	START
	<ul> <li>Full Description</li> <li>Directions         <ol> <li>Click "Start" in the top-right corner to begin the exam. When you are in the exam, click "Start" in the bottom-right corner.</li> <li>Complete the exam.</li> <li>After the "Assessment Review", close the window by clicking the large "X" in the top-right corner (NOT your browser).</li> <li>Verify your certification completion in the "Learning Activity Progress Detail" window.</li> <li>Return to the homepage by clicking the "Home" button in the top-left corner.</li> </ol> </li> </ul>	
	Additional Information	



### **Access Certification History**

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# **Certification History**

#### **Step 01**:

Access the History and Certification page by clicking Certification Status link on the navigation bar.



#### **Step 02:**

In the Certification History, you will be able to view your previously completed courses and certification exams.

TRAINING TRANSCRIPT					PRINT	EXPORT TO PDF
Date Ra Start Date	ear or date range to filter completed training records. Inge  End Date Boystram  Free G/12/2024 09:57am  Free REFRESH				Viev St	<b>v:</b> andard ~
VINCEN	IT					
List of cor <b>Usernam</b> vvigli01	npleted activities from 6/12/2023 to 6/12/2024 e:		User number:			
E-mail:			Manager:			
Primary j	ob:		Primary organization:			
ACTIVIT	ES					
	Activity +	Start Date	Completion Date	Completion Sco Status	ore Est	imated Credit Hours
сş	Quick Assessment: MAPD and PDP Certification	6/11/2024	6/11/2024	Attended 100	0	
-	ې Course: Annual Medicare Certification Training	6/11/2024	6/11/2024	Attended		

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### **Certification History**

#### **Step 03**:

By default, the transcript will show one year's worth of activities. You can use the "Date Range" drop down to select previous years or view your entire history.

#### Step 04:

The "Export to PDF" button will enable you to save a copy of your transcript to your computer.

#### TRAINING TRANSCRIPT

Select a year or date range to filter completed training records.

 Date Range
 v

 Start Date
 End Date

 4/13/2022 04:55pm
 Image 4/13/2023 04:55pm

PRINT EXPORT TO PDF

#### TRAINING TRANSCRIPT





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### **Certification History**

#### **Step 05:**

Your score is shown on the right side of the MAPD activity.

#### ACTIVITIES

	Activity 🗸	Start	<b>Start Date</b> 4/5/2023		Completion Status	Score
	Curriculum: Medicare Product Training	4/5/2			Attended	
r;	Quick Assessment: MAPD 2023	4/6/2	023	4/6/2023	Attended	95
	Curriculum: Broker Agreements	4/12/	4/12/2023		Attended	100
	Course: AHIP 2023	4/5/2	023	4/5/2023	Attended	100
		Completion Statu				
		Attended	95			
		Attended	•			
		Attended	100			

#### **Step 06**:

The small, blue image to the left of the MAPD activity is a link to your Certification of Completion.

Click the image to open a new window with your certificate of completion.



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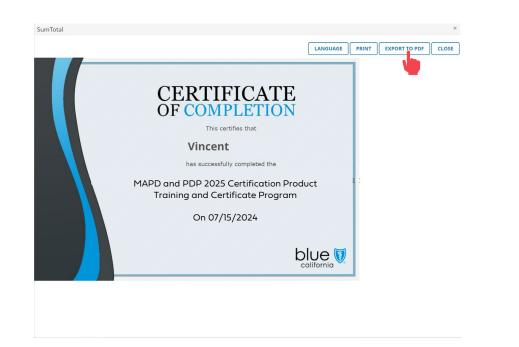
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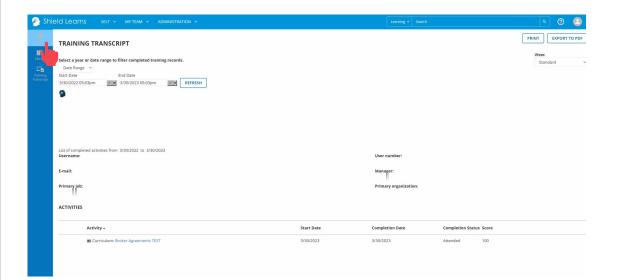
#### **Step 07:**

Click the "Export to PDF" button to generate a PDF version of the certificate. You can then save the PDF and/or print the certificate for your records.



#### **Step 08:**

Click the Home icon to return to Home Screen.





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#### **User Guide**

Quick Reference Guide

Click the User Guide link to view a step-by-step guide for the Medicare Product Online Certification portal.



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FAQ User Guide Certfication Status Agency/Profile Update

Thank you for your interest in selling Blue Shield of California's MAPD and/or PDP plans! Before getting started, **you must have already completed the AHIP Medicare Compliance certification**. If you're ready, please continue through the steps below.





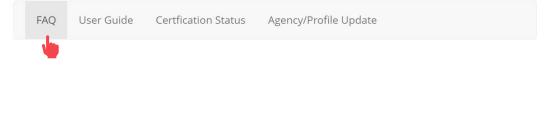
Accessibility Statement for Individuals with Disabilities
At Blue Shield of California, we are committed to ensuring our applications are accessible to individuals with disabilities.
If you need assistance using our certification application, we can help you.
Please email us at producer.services@blueshieldca.com or call us toll-free at 800-559-5905 / TTY: 711.

### FAQs

View a list of frequently asked questions by clicking the FAQ link.

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Medicare Product Online Certification



#### Broker Certification Site

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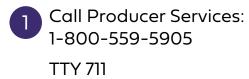
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### How to get help



2 Email: Producer.Services@blueshieldc a.com



Connect with your Broker Manager

- Blue Shield Certification Information: Information Page
- National Insurance Producer Registry: <a href="https://pdb.nipr.com/html/PacNpnSearch.html">https://pdb.nipr.com/html/PacNpnSearch.html</a>
- AHIP Training Producers Site: <u>http://www.ahipmedicaretraining.com/clients/blueshieldca</u>
- Broker Connection Site: <u>Broker Certification Producer Connection (blueshieldca.com)</u>

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