



BlueCross BlueShield of Texas



# Retail Producer Portal Agent Assisted Enrollment

November 2023

# Before we get started...

This training presentation focuses on Individual & Family Markets (IFM).

This presentation, and the information contained within it, is current as of November, 2. It is subject to change based on subsequent federal and state law, regulations and guidance.

The content is for **producer education and training purposes only** and should not be shared with a prospect, an applicant, member, group or the general public.

# Agent Assisted Enrollment Overview

Starting in October 2022, the Retail Producer Portal (RPP) offered Agents an assisted, On Exchange enrollment solution. Powered by HealthSherpa, this flow allows an Agent to quote and enroll their clients exclusively in Blue plans (referred to as White Label solution), via the Enhanced Direct Enrollment (EDE) pathway. One of the most exciting features of the White Label solution and EDE pathway is that the Agent's NPN is always associated with the client's application so the Agent will not be dropped from the application. Enrolling a client via HealthSherpa White Label solution is also more expedient and efficient than going to HealthCare.gov directly.

Beginning **11/1/2023**, Agent express links via RPP will be disabled for Individual (Under 65) business. Agents are only able to use their express link for Medicare and 2023 SEP off-exchange Individual business.

Agents must be registered on the White Label Solution to obtain their “direct link”. If they have not already registered with the White Label Solution for On Exchange, they need to do so now to assist with both On and Off Exchange client-directed shopping and enrollment on the White Label Solution. Again, using this direct link and the EDE pathway via the White Label Solution will maintain the Agent's NPN so the Agent will remain attached to the application. Agents will need the White Label Solution direct link to send quotes to clients.

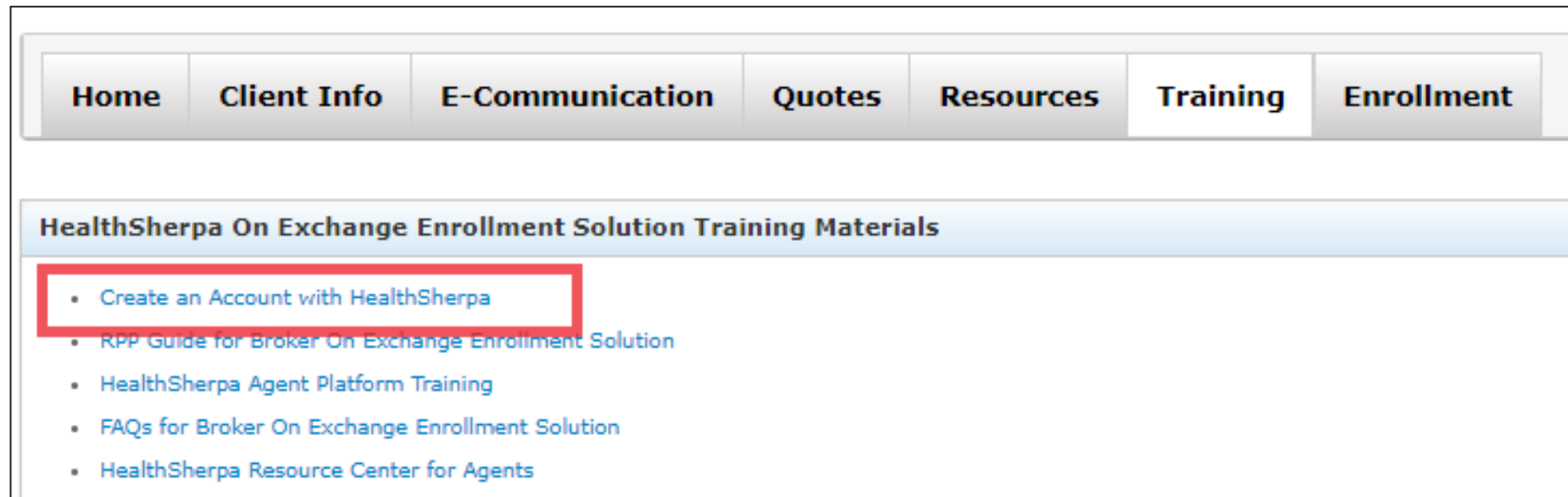
Nothing is changing with the electronic direct enrollment for Off Exchange on RPP. The Off Exchange Enrollment Tab on RPP is **NOT** being replaced with the HealthSherpa White Label Solution Off Exchange option. It is especially recommended that Agents use the Enrollment Tab on RPP to submit Off Exchange applications. The HealthSherpa White Label Solution for Off Exchange (beginning 11/1/23) is in addition to the Enrollment Tab on RPP. **The Enrollment Tab is the fastest and easiest way to enroll a client for an Off Exchange policy.**

# Creating an Account on HealthSherpa White Label Solution

The first step to ensuring a smooth OE period, is to register for and create an account now and not wait until just before Open Enrollment.

To access the link to the White Label Solution:

- Log into RPP
- Select the Training tab
- Select the link for “Create an Account with HealthSherpa”



# Creating an Account on HealthSherpa White Label Solution cont.

Consumers: 855.257.0331 Español

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Oklahoma • Texas

(855) 257-0331 Sign in

## Sign up for a free agent account

Process enrollments and renewals, manage leads and strengthen your overall business with the power of HealthSherpa's Agent Tools behind you.

EMAIL

PASSWORD ☐ Show

[Continuar en Español](#)

**Sign Up**

By signing up, you attest that you agree with our [Terms of Service](#), and consent to receiving emails from HealthSherpa.

Enter your email address.

NOTE: If the Agent has an existing HealthSherpa Marketplace account and would like to create a White Label Solution account, then please add the following carrier slug in the email address. This allows the Agent to use the same email address for both accounts but will have separate logins.

Carrier Slug: bcbs-inmot

Example:

Email address is

[Jane@testing.com](mailto:Jane@testing.com)

Email address with Carrier slug:

[Jane+bcbs-inmot@testing.com](mailto:Jane+bcbs-inmot@testing.com)

Enter password

Click on the Sign Up Button

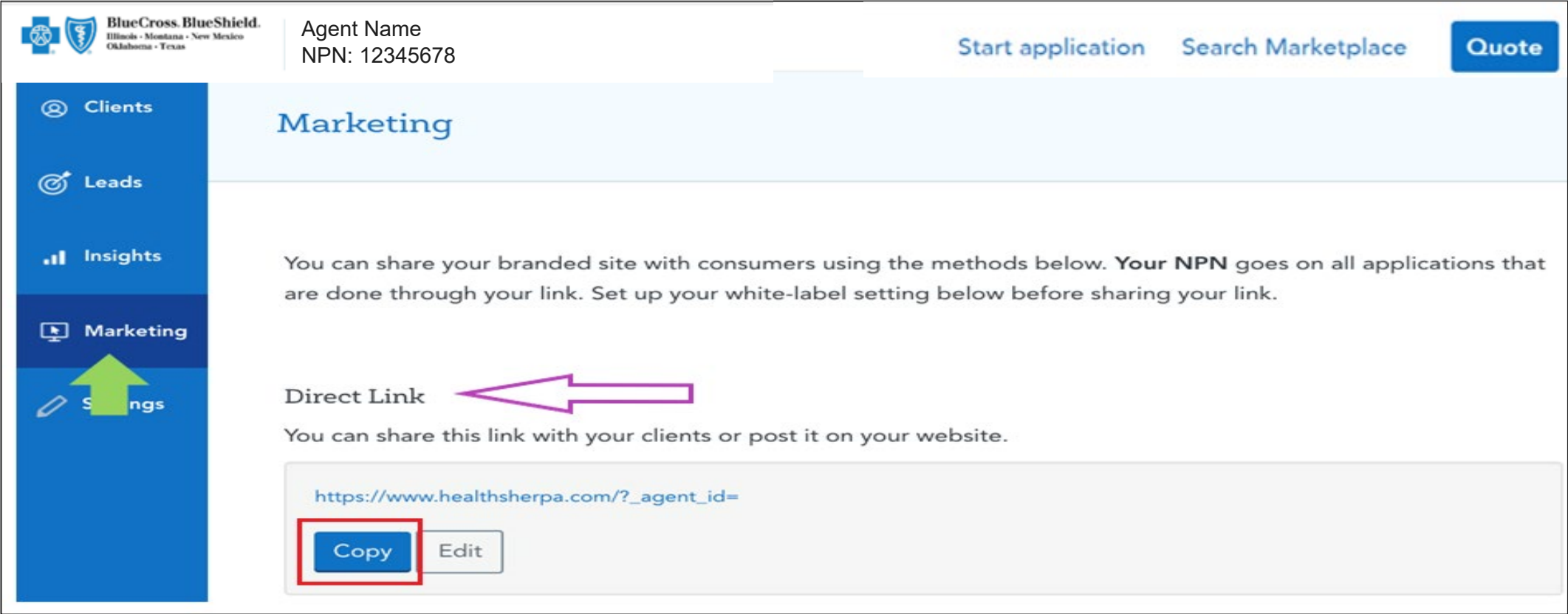
Complete the steps for creating an account. For additional assistance, please review our detailed [guide](#). Once the Agent has finished all the necessary steps, they are ready to quote, enroll and service their clients.

# Locating and Using the Direct Link on HealthSherpa White Label Solution

The Agent’s direct link works like their previous express link on RPP. The Agent’s NPN is captured with the direct link and all applications submitted through an Agent’s direct link will have their NPN attached to the application.

From the Agent dashboard, access “Marketing” on the left panel. Click on Copy the “Direct Link” and the Agent can paste this link in an email and/or business website. This will direct clients to a customizable landing page where they can shop and enroll in plans on their own.

When clients click on the link, they are taken to the broker’s uniquely branded enrollment site, where they can enter some information and click “See plans and prices” to start the quoting process. They have an option to shop directly themselves and apply for either On or Off exchange.





# Customizing the Direct Link

Marketing

Analytics toolsBranding

Your free, custom ACA Marketing site

Let clients self-enroll

Clients can shop and enroll on their own. Scale your business online by sharing your link via email, social media, or ads.

Track their progress

Your [Leads list](#) tracks shoppers on your site. Any shoppers who enroll appear on your [Clients list](#).

Custom to you

All enrollments use your NPN, so you get commission.

MarkSmith

Mark Smith NPN 23242312

Easily find and affordable health plan.

Zip code\*

Name

Email

Phone

See plans & prices

Custom marketing links

You can define UTM parameters to customize your marketing URL and use them to track your traffic.

Generate Marketing URL

Base URL ⓘ

https://enroll.bcbs-inmot.com/?\_agent\_id=

Source

Medium

Campaign Name

Language

English

Spanish

Generated Marketing Campaign URL

https://enroll.bcbs-inmot.com/?\_agent\_id=

Copy

Marketing

Analytics toolsBranding

Add your company information

You can share your branded site with consumers using the methods below. Your NPN goes on all applications that are done through your link. Set up your white-label setting below before sharing your link.

Company name

Company Phone

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# Customizing the Direct Link and your White Label Page with your Phone Number

To ensure your phone number is listed with your Direct link, please complete the following steps.

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Clients

Leads

Insights

Marketing

Settings

Marketing

Analytics tools

Branding

Custom marketing links

You can define UTM parameters to customize your links

Generate Marketing URL

Base URL ⓘ  
https://enroll.bcbs-inmot.com/?\_agent\_id=

Click on the Marketing tab on the left and under the Analytics tools, you will see Customize your URL.

Click on the Copy button

Customize your URL

You can edit the link to your landing page using letters, numbers, dashes, and underscores.

WARNING: Your previous link will no longer work once you take this link.

https://enroll.bcbs-inmot.com/?\_agent\_id=

Copy Edit Convert to Spanish

https://enroll.bcbs-inmot.com/?\_agent\_id=

Copy Edit Convert to Spanish

Copied!

Once you see the “Copied” confirmation on the page, paste this into another document for adding your phone number.

[https://enroll.bcbs-inmot.com/?\\_agent\\_id=](https://enroll.bcbs-inmot.com/?_agent_id=)

At the end of the direct link, add the following: **&call=phonenumber**, for example, see below.

[https://enroll.bcbs-inmot.com/?\\_agent\\_id=&call=6308246192](https://enroll.bcbs-inmot.com/?_agent_id=&call=6308246192)

Adding this extension, will add your phone number to the top of your White Label page automatically. You can send the updated direct link to your clients, post to a business website and/or social media page.

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Agent Name  
NPN: 12345678

Consumers: 630.824.6192

Español

Sign in



# Off Exchange Enrollments

Off Exchange enrollment can still be done via the Enrollment Tab on RPP. Nothing is changing with electronic Off Exchange application submissions. **This is the preferred method for all Off Exchange applications.**

Dental Only Applications can be submitted via the Enrollment Tab as well.

HomeClient InfoE-CommunicationQuotesResourcesTrainingEnrollment

Attention: 2023 Dental Only forms are now available for submission on the Enrollment tab!

Agent Assisted Enrollment

Producer Information

Producer First Name

Producer Last Name

Company Name

Writing Producer Number\*

Start Application

HomeClient InfoE-CommunicationQuotesResourcesTrainingEnrollment

Attention: 2023 Dental Only forms are now available for submission on the Enrollment tab!

Agent Assisted Enrollment

Application Information

Writing Producer Number

Applicant Name

Choose Application Form \*

Effective Date

Estimated Monthly Premium

107900928

2023 Dental Application

Select One

2023 Medical/Dental Application

2023 Dental Application

11/01/2023

More Information Needed

Authorization

# On Exchange Enrollments

The Agent can access the White Label Solution from the Quotes Tab on RPP from the Enroll in On Exchange QHPs button, or by selecting the Apply for this Plan button after generating an RPP quote. Both options redirect to the White Label Solution Agent sign in page. Completing an application averages about 9 minutes.

HomeClient InfoE-CommunicationQuotesResourcesTrainingEnrollment

▶ Click Here to learn about important changes for On-Exchange consumer enrollments, quote links and Express Links.

▶ Click Here to register with HealthSherpa to enroll clients in on-exchange qualified health plans (QHPs)

▶ Attention: 2023 Dental Only forms are now available for submission on the Enrollment tab!

Applicants

Enroll in On Exchange QHPsBy clicking this link you will be redirected to the HealthSherpa Sign In page

HomeClient InfoE-CommunicationQuotesResourcesTrainingEnrollment

Off-ExchangeOn-Exchange

Save ProposalSend QuoteView Additional Benefits

Viewing 14 of 14 matching plans.

☐ Blue Advantage Bronze HMO 204

Summary of Benefits

Network	Deductible	Out-of-Pocket	Coinsurance	Office Visit	Premium
Blue Advantage HMO	\$6,000	\$8,700	50%	\$45 Copay	\$334.95

Dental Coverage ☐ Yes ☐ No

Apply for this Plan >

# On Exchange Enrollments

Agents can either Run a Quote then apply, or Start application then quote. Either way works.




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Agent Name  
NPN: 12345678

Start application   Search Marketplace   

Quote



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Dashboard

Primary contact

Household

Members

Income

Additional questions

Finalize

Start application

Use our Healthcare.gov redirect

Start by searching the Marketplace for an existing application. If we find a matching application, we'll load it for you to update. If not, you can start a new one.

First name

Last name


Date of birth

Coverage state

☐ I've received permission from this consumer to work on their behalf.

Search the Marketplace


Or search by SSN



Write a new application

Run a quote

Start application



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Dashboard

Close

Your details

Zip code

Household members

Who is applying for coverage?

Household income

Eligibility

Age

DOB

Sex

35

M

F

☐ Tobacco user

☐ Parent of child under 19

☐ Pregnant

☐ Eligible for other coverage

Delete

Close

Add spouse applicant

Add dependent applicant

No savings applied.

Plans will show as full price until you complete your details.

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# Resources for Assistance

Getting Started Guide – HealthSherpa

<https://faq.healthsherpa.com/en/articles/2858414-getting-started-agent-resource-guide>

Topics with the Getting Started Guide

- Navigating Your Dashboard
- Enhanced Direct Enrollment (EDE)
- FFM Account Integration
- Shopping & Enrollment Tools
- Easy Renewal Process
- And many more

## HealthSherpa Broker Tech Support

Phone 888-684-1373

Available weekdays 10am-6pm CST

Email

[agent\\_support@healthsherpa.com](mailto:agent_support@healthsherpa.com)

Chat from the Agent Dashboard



## RPP

[Home](#) [Client Info](#) [E-Communication](#) [Quotes](#) [Resources](#) [Training](#) [Enrollment](#)

**HealthSherpa On Exchange Enrollment Solution Training Materials**

- [Create an Account with HealthSherpa](#)
- [RPP Guide for Broker On Exchange Enrollment Solution](#)
- [HealthSherpa Agent Platform Training](#)
- [FAQs for Broker On Exchange Enrollment Solution](#)
- [HealthSherpa Resource Center for Agents](#)

**Retail Producer Portal Training Materials**

- [SEP Document Guide](#)
- [SEP Validation Process Training for Non-Marketplace Policies](#)
- [New Enroll Member Button Features \(Effective June 04, 2021\)](#)
- [Retail Readiness \(Products & Marketing\)](#)

# Contacts

Contact Presale Producer Support or your Senior Producer Sales Consultant

State	Number
IL	866-446-4353
MT	855-707-0598
NM	866-446-5685
OK	866-446-5684
TX	800-531-4457

Producer Sales Consultants			
Linda Behrens (TX) <a href="mailto:linda_Behrens@bcbstx.com">linda_Behrens@bcbstx.com</a> 210-219-5545	Jason Black (IL, MT) <a href="mailto:Jason_black@bcbsil.com">Jason_black@bcbsil.com</a> 630-824-5296	Johnny Cantu (TX) <a href="mailto:johnny_cantu@bcbstx.com">johnny_cantu@bcbstx.com</a> 972-766-5612	Manny Gelabert (IL, MT, NM) <a href="mailto:manuel_Gelabert@bcbsil.com">manuel_Gelabert@bcbsil.com</a> 630-824-5210
Gary Leal (TX) <a href="mailto:gary_c_leal@bcbstx.com">gary_c_leal@bcbstx.com</a>	Damian Merrill (OK) <a href="mailto:damian_merrill@bcbsok.com">damian_merrill@bcbsok.com</a> 405-365-2858	Zane Whitlow (OK) <a href="mailto:zane_whitlow@bcbsok.com">zane_whitlow@bcbsok.com</a> 918-408-3485	