



# **eQuoting Small Business Reference Guide for Agents**

**Production Revision No. 1.2  
August 10, 2007**

## Revision History

<b>Date</b>	<b>Version</b>	<b>Description</b>	<b>Author</b>
May 3, 2007	0.9	Pre-Production Release for Business Approval	Deb Watkins
May 7, 2007	0.91	Minor wording, formatting, TOC and pagination for improved document flow. Removed a misleading Step 3 in the Instructions for New Agents and added a few extra yellow arrows to reduce overall processing time.	Deb Watkins
June 12, 2007	1.0	Final – for Go Live includes Brigid Winkler’s and Mary Ditzel’s feedback	Deb Watkins
June 18, 2007	1.1	Includes updates from Linda Davis	Deb Watkins
August 10, 2007	1.2	Removes the section discussing manually setting up for more than one relationship between admin and agent – this will not be permitted – only one to one is supported	Deb Watkins

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## Intended Audience

This document applies to agent companies, not to managing agent companies. If you are a Managing Agent User, please refer to the eQuoting Quick Reference Guide for Managing Agent Companies.

## Purpose

This guide is intended for agent users and their administrators needing access to the eQuoting for Small Groups web-based application. It provides detail associated with obtaining eQuoting access through the BCBSM agent portal.

## Invitation to the BCBSM Agent Portal

Agents have the capability to register themselves to the BCBSM Portal and **should not be invited by Managing Agents** because this would assign them to the wrong company administrator and would not give them appropriate agent role.

## Additional Documentation

For more information on BCBSM's Secured Services, see the "Company Administration Guide" and "Company Registration – Quick Reference Guide" obtained from the "Help" link located at the bottom of your agent portal home page.

## Background Information

This section provides background for the delegated administration rules related to the BCBSM agent portal and specifically eQuoting. Delegated security administration can be a bit confusing at first and there are some distinctions that are not intuitive. It is recommended that you review this section carefully before proceeding in order to have a clear understanding of the terms used in this document.

### Definition of an Agent Company

- One agent (and only one) plus all the agent administrators who work on the same quotes are considered one agent company, regardless of whether they work for a larger agency.
- There may be multiple agent companies within your agency. There is no collective representation of the entity "agency" within the agent portal or the eQuoting application at this time.

### Company Administrators

- The first step is to identify the one agent associated with one unique agent number (also called agent ID or agent code.) This must be the first person to register for eQuoting under an agent company.

- Within the agent portal, each agent company must assign one company administrator who is responsible for adding and removing users and administering service packages for the company. The agent company cannot exist in the agent portal without at least one company administrator, who is the agent.
- It is recommended that you designate at least one secondary company administrator for your company once the primary agent/company administrator has access.

### **Autogranting**

- If your agent company was established prior to eQuoting/autogrant go-live date (6/21/07) your company did not and will not have eQuoting package autogrant. This means your company administrator must request that service for your company explicitly. Autogrant only applies to services at the time of registration.
- Autogrant only applies to the service packages at the company level. Users of the company do not get the eQuoting application autogrant.
- All users (except a new agent/autogrant company administrator) must either request eQuoting service explicitly (under “My Services”) and have it approved by their company administrator, or the company administrator can grant eQuoting service to the user.
- If eQuoting is not available under “My Services” for a user, this means your company administrator has not yet requested the service for your company.

### **Detailed Instructions**

In order for you to obtain eQuoting access, three conditions are necessary:

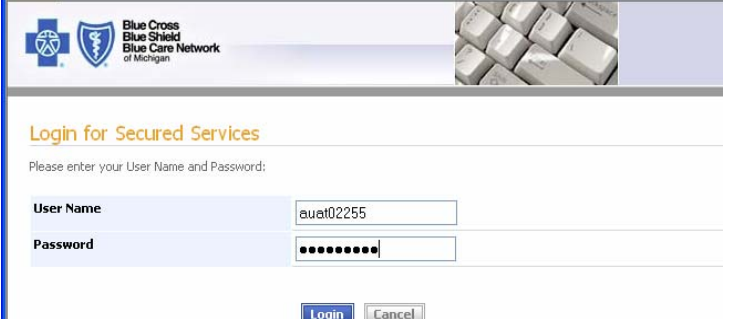
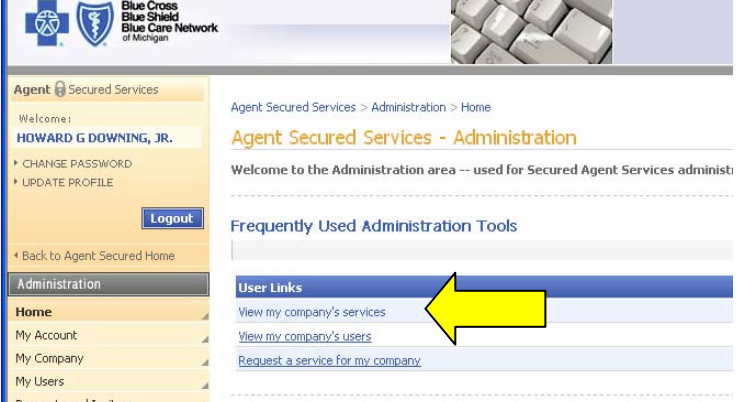
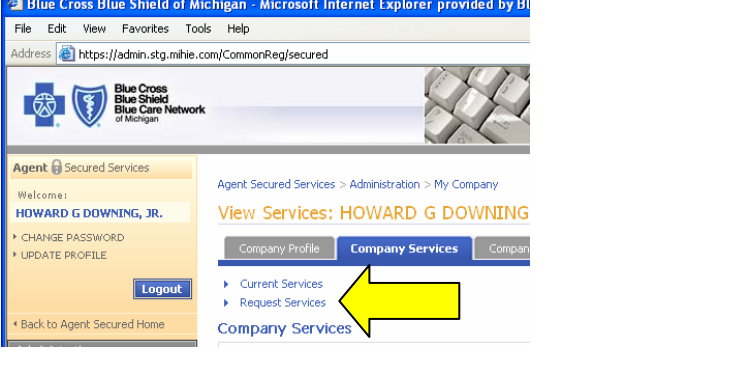
1. Your company must have the eQuoting service package
2. You as the user must have the eQuoting service package
3. The agent must request his/her access first before any administrators can request access so that relationships can be appropriately established

**NOTE:** The screenshots contain links from our QA system and do not represent the URLs that would be used in production.

## Instructions for Agents with Existing BCBSM Agent Portal Accounts


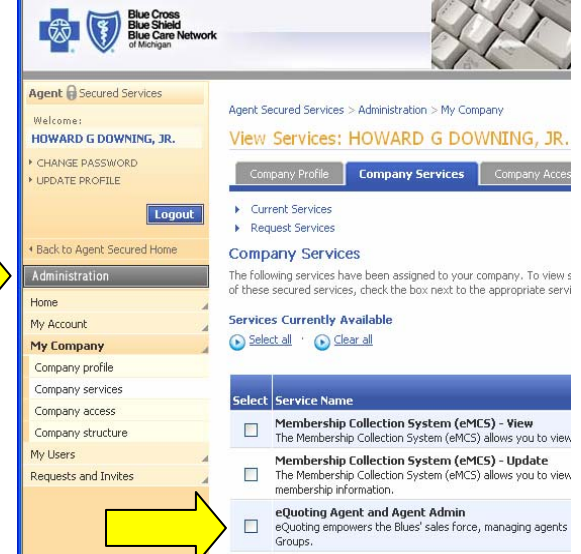
If you are a company administrator who registered for BCBSM's agent or group portal prior to 6/21/07, you will not get the application autograted to you. Please follow this section.

### Request the eQuoting service for your company

<p>1. Login to the BCBSM agent portal through the company administrator's account.</p>	
<p>2. Select "View My Company's Services."</p>	
<p>3. Select "Request Services."</p>	

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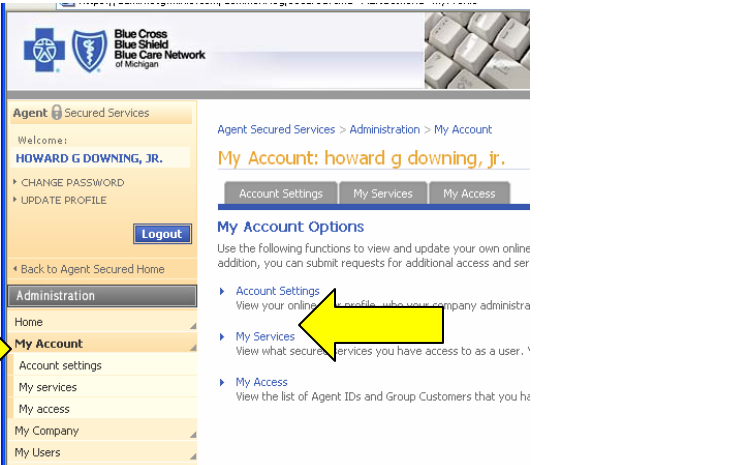
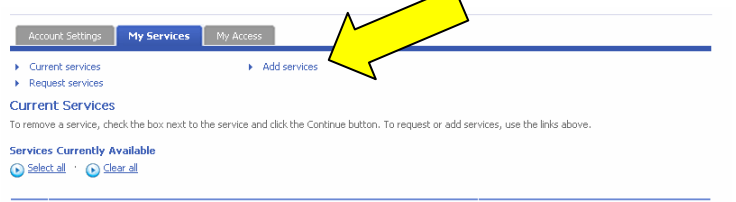
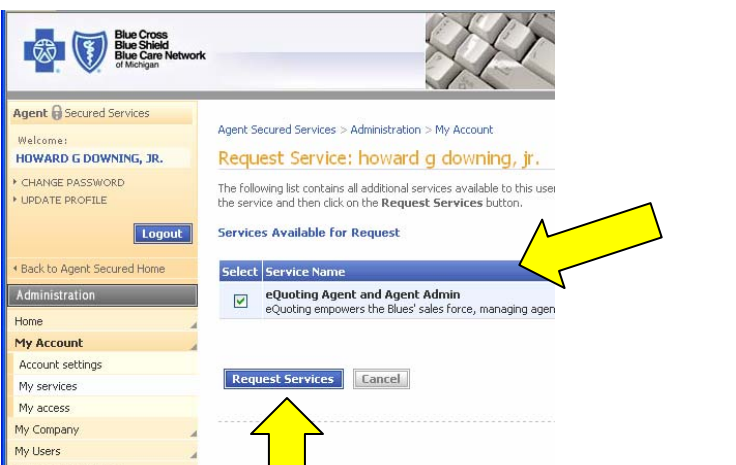
Instructions for Agents with Existing BCBSM Agent Portal Accounts, *continued*

<p>4. Select “eQuoting for Agents and Agent Administrators” and “Continue.”</p>	 <p>Agent Secured Services &gt; Administration &gt; My Company</p> <p>Welcome: <b>HOWARD G DOWNING, JR.</b></p> <p>Request Service: <b>HOWARD G DOWNING, JR.</b></p> <p>The following services are available for HOWARD G DOWNING, JR. to request access to any additional service, select the checkbox to the left.</p> <p>Services Available for Request</p> <table border="1"><thead><tr><th>Select</th><th>Service Name</th></tr></thead><tbody><tr><td><input checked="" type="checkbox"/></td><td><b>eQuoting Agent and Agent Admin</b> eQuoting empowers the Blues' sales force, managing agents an</td></tr></tbody></table> <p>Continue Cancel</p>	Select	Service Name	<input checked="" type="checkbox"/>	<b>eQuoting Agent and Agent Admin</b> eQuoting empowers the Blues' sales force, managing agents an				
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<input checked="" type="checkbox"/>	<b>eQuoting Agent and Agent Admin</b> eQuoting empowers the Blues' sales force, managing agents an								
<p>5. Confirm access by returning to Administration/Company Services.</p> <p>NOTE: This only makes the eQuoting Service able to be requested by the users in your company. You must continue and add the eQuoting service to your account before you can use the application.</p>	 <p>Agent Secured Services &gt; Administration &gt; My Company</p> <p>Welcome: <b>HOWARD G DOWNING, JR.</b></p> <p>View Services: <b>HOWARD G DOWNING, JR.</b></p> <p>Company Profile Company Services Company Access</p> <p>Current Services Request Services</p> <p>Company Services</p> <p>The following services have been assigned to your company. To view s of these secured services, check the box next to the appropriate servi</p> <p>Services Currently Available</p> <p>Select all Clear all</p> <table border="1"><thead><tr><th>Select</th><th>Service Name</th></tr></thead><tbody><tr><td><input type="checkbox"/></td><td><b>Membership Collection System (eMCS) - View</b> The Membership Collection System (eMCS) allows you to view</td></tr><tr><td><input type="checkbox"/></td><td><b>Membership Collection System (eMCS) - Update</b> The Membership Collection System (eMCS) allows you to view membership information.</td></tr><tr><td><input type="checkbox"/></td><td><b>eQuoting Agent and Agent Admin</b> eQuoting empowers the Blues' sales force, managing agents Groups.</td></tr></tbody></table>	Select	Service Name	<input type="checkbox"/>	<b>Membership Collection System (eMCS) - View</b> The Membership Collection System (eMCS) allows you to view	<input type="checkbox"/>	<b>Membership Collection System (eMCS) - Update</b> The Membership Collection System (eMCS) allows you to view membership information.	<input type="checkbox"/>	<b>eQuoting Agent and Agent Admin</b> eQuoting empowers the Blues' sales force, managing agents Groups.
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Instructions for Agents with Existing BCBSM Agent Portal Accounts, *continued*

### Add the eQuoting service to your account

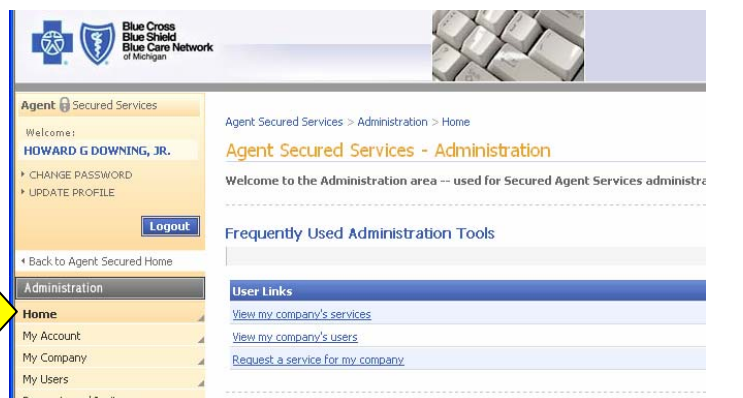
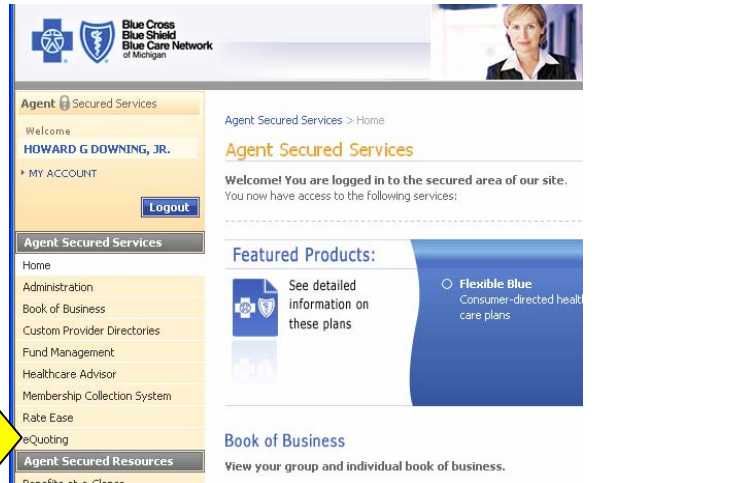
<ol style="list-style-type: none"><li>1. Select "My Account"</li><li>2. Select "My Services"</li></ol>	 <p>Agent Secured Services</p> <p>Welcome: <b>HOWARD G DOWNING, JR.</b></p> <p>Account Settings   My Services   My Access</p> <p><b>My Account Options</b></p> <p>Use the following functions to view and update your own online addition, you can submit requests for additional access and ser</p> <ul style="list-style-type: none"><li>Account Settings</li><li><b>My Services</b></li><li>My Access</li></ul>				
<ol style="list-style-type: none"><li>3. Select "Add Services."</li></ol>	 <p>Account Settings   <b>My Services</b>   My Access</p> <p>Current services   Add services</p> <p><b>Current Services</b></p> <p>To remove a service, check the box next to the service and click the Continue button. To request or add services, use the links above.</p> <p>Services Currently Available</p> <p>Select all   Clear all</p>				
<ol style="list-style-type: none"><li>4. Select "eQuoting Agent and Agent Admin" service package</li></ol>	 <p>Agent Secured Services</p> <p>Welcome: <b>HOWARD G DOWNING, JR.</b></p> <p>Account Settings   My Services   My Access</p> <p><b>Request Service: howard g downing, jr.</b></p> <p>The following list contains all additional services available to this user the service and then click on the <b>Request Services</b> button.</p> <p><b>Services Available for Request</b></p> <table border="1"><thead><tr><th>Select</th><th>Service Name</th></tr></thead><tbody><tr><td><input checked="" type="checkbox"/></td><td><b>eQuoting Agent and Agent Admin</b> eQuoting empowers the Blues' sales force, managing agen</td></tr></tbody></table> <p>Request Services   Cancel</p>	Select	Service Name	<input checked="" type="checkbox"/>	<b>eQuoting Agent and Agent Admin</b> eQuoting empowers the Blues' sales force, managing agen
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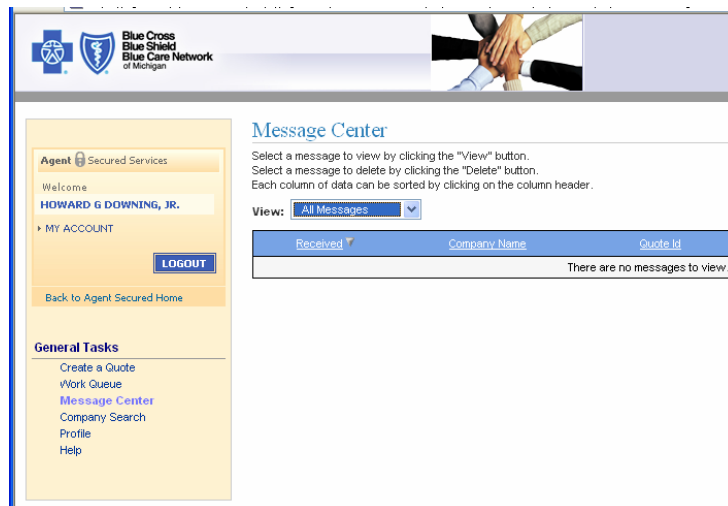


Instructions for Agents with Existing BCBSM Agent Portal Accounts, *continued*

## Access the eQuoting service

<p>1. To access eQuoting return to the Agent Secured Home.</p>	 <p>The screenshot shows the 'Agent Secured Services - Administration' page. The left navigation menu includes 'Home', 'My Account', 'My Company', and 'My Users'. A yellow arrow points to the 'Home' link.</p>
<p>2. Select eQuoting from the Agent Secured Services menu.</p>	 <p>The screenshot shows the 'Agent Secured Services - Home' page. The left navigation menu includes 'Home', 'Administration', 'Book of Business', 'Custom Provider Directories', 'Fund Management', 'Healthcare Advisor', 'Membership Collection System', 'Rate Ease', 'eQuoting', and 'Agent Secured Resources'. A yellow arrow points to the 'eQuoting' link.</p>

You will automatically be logged into the eQuoting application.

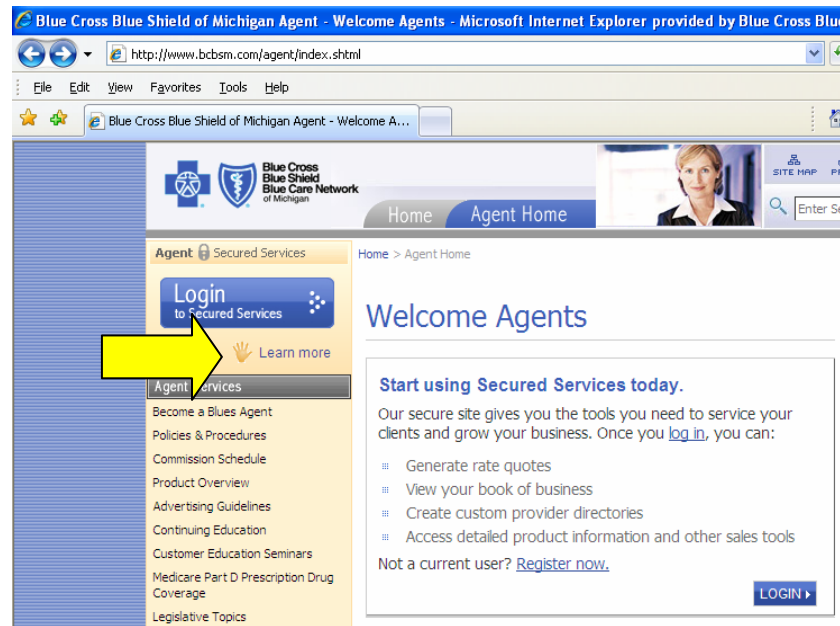


The screenshot shows the eQuoting application's Message Center. The page includes a 'Message Center' header, instructions on how to view or delete messages, and a table with columns for 'Received', 'Company Name', and 'Quote Id'. The table is currently empty, displaying 'There are no messages to view.'

## Instructions for Agents New to the BCBSM Agent Portal Accounts

These instructions are for agents who did not have a portal ID as of 5/10/2007.

1. Decide which user(s) in your company will have the company administrator role. It is recommended that this is the Agent.
2. Go to [www.bcbsm.com](http://www.bcbsm.com) - I Am an Agent – and register your agent company. Online instructions are available when you click **Learn More**.



- Because you are a new agent you will be autogranting the eQuoting package for your company users AND you will automatically get access to the eQuoting application for your own ID.
  - As company administrator, you will be able to invite other agent administrators who will work on your quotes. You can add eQuoting access for them directly when you approve their IDs, or they can do this step by themselves. Do this from the Administration screen under My Users and Invitation. For help doing this, see the documents referenced in the “Additional Documentation” section.
3. Invite at least one additional user (Agent Administrator) if possible, and assign them as a company administrator (it is good practice to have a secondary). A yellow star next to the name denotes the company administrator; to add a secondary company administrator, select the user from the list, and then select Modify Roles.

## Instructions for Agent Admins with Existing Portal Accounts

The agent must get his/her access first, before any administrators can request access so that relationships between the team members can be established.

1. Login to your BCBSM Portal Account
2. Select "My Services" to add eQuoting access to your personal portal account.

**Note:** The Company Administrator must approve your request – or grant eQuoting to you and all the agent administrators in your company. The later will reduce steps.

- You will receive an email indicating eQuoting access has been granted. Next time you login you will then see a link to eQuoting on the left side menu.

3. Click appropriate link to get into eQuoting Small Groups application.

**Note:** When you create a quote, you will automatically see your agent's name in the Agent dropdown. You can only assign quotes to one Agent.

**Note:** If you don't see a menu on the left-hand side of the screen with eQuoting and RateEase, you can go to "My Services" and request eQuoting access.

- This happens when the Company Administrator forgets to give you eQuoting access. You can request it yourself and then the Company Administrator must approve it.
- An Agent Administrator can only be provisioned automatically with a relationship to one Agent.
- For Agent Administrators who need relationships with more than one Agent, this must be either provisioned by hand within the eQuoting system (a call to the BlueWeb Helpdesk).
- BCBSM's official policy is that a person can have only one Portal ID and cannot share their ID.