

FMO Agent Contracting and Onboarding Guide

FMO | August 2022

Florida Blue 
Your local Blue Cross Blue Shield

MEDICARE

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Welcome to Florida Blue Medicare

- This Agent Onboarding guide was developed to assist the Field Marketing Organization (FMO) agent with successfully completing the agent contracting, agent onboarding, registering for Florida Blue's Self-Service portal, AgentPoint and completing required CMS Medicare Training processes.
- Once all steps are successfully completed, the FMO agent will be Ready To Sell (RTS) and will receive a RTS Email!
- Note: only an authorized Agency Owner or Tier III Delegate will have access to submit agent appointments

Invite to Onboard: FMO Appointment Form & Agent Agreement

Step1:

- Once the Agency Owner or Tier III delegate submits the agent appointment request in the online portal-AgentPoint, the agent will receive an email invitation from Florida Blue Medicare(FBM)

ChannelPartnerManagementTeam@bcbsfl.com

- The email will contain a link (Appointment Application) which will navigate the agent to complete the FMO Agent Agreement & Appointment form.

- Subject line of the email:

Agent Appointment Form & Requirements

You are receiving this email because an agent appointment(s) request has been received.

Agent Contact

Agency Contact

FMO Agency
Agency of Record code{5-digit Agency Code}

To access the necessary appointment forms please click on the link below and complete all requirements.

In order to complete this form, you will need to know your license number, National Producer Number (NPN) and your Errors & Omissions Summary (in some cases). If you do not know your NPN, you can click here to locate: [click here](#).

[Appointment Application](#).

Please note, your appointment(s) will not be completed without successful submission of all requirements.

Your internal reference number (Tracking Record) is: 9999999

Florida Blue, Health Options, Inc., Florida Blue Medicare, Inc., Florida Combined Life Insurance Company, Inc. and Truli for Health are Independent Licensees of the Blue Cross and Blue Shield Association.

Completing the FMO Appointment Form & Agent Agreement

Complete the Agent Overview section

Welcome Cowboy

All information provided must match the information from the Office of Insurance Regulation (OIR) database. Once started, you must finish the Application within 45 days. The electronic application will not store partial information. Please fully complete the application. For additional information please contact Agent Service Center: 1-800-267-3156

Agent Appointment

Overview
 Details
 WB & Agent Agreement
 Direct Deposit
 Questionnaire
 Signature
 Authorization

User Information

First Name*
 Last Name*
 MI
 Suffix

Date of Birth*
 Social Security Number (SSN)*
 Gender*

Contact Information

Work Phone*
 Home Phone
 Fax Number

Email Address*

Completing the FMO Appointment Form & Agent Agreement

- Next the agent will complete the Details screen
- The agent must enter the Errors & Omissions (E&O) details.
- Licenses and License Types details- if the agent does not know these details, it can be obtained by accessing the Department of Financial Services (FLDFS) Licensee search website at: <https://licenseesearch.fldfs.com/>
See page 7 for screenshot of DFS system

All information provided must match the information from the Office of Insurance Regulation (OIR) database. Once started, you must finish the Application within 45 days. The electronic application will not store partial information. Please fully complete the application. For additional information please contact Agent Service Center: 1-800-267-3156

Agent Appointment

Overview
 Details
 W9 & Agent Agreement
 Direct Deposit
 Questionnaire
 Signature
 Authorization

Errors and Omissions - Florida Blue Medicare requires each Agent to obtain and maintain a minimum of \$500,000 in specific coverage amount and \$1,000,000 in aggregate coverage amount Errors & Omissions (E&O) insurance coverage prior to becoming an appointed agent

Policy Number*	Coverage Start Date*	Coverage End Date*
78994544	01/01/2000	01/01/2024
Carrier*	Specific Coverage Amount*	Aggregate Coverage Amount*
Farmers	5000000	10000000

Licenses and License Types

Licenses Number*	NPN*
A123456	123456

License Type *

2-14 Life Variable Annuity
 2-15 Life Health Var Annuity
 2-18 Life
 2-18 Life Health
 2-20 Gen Lines - Prop Cas Ins
 2-40 Health

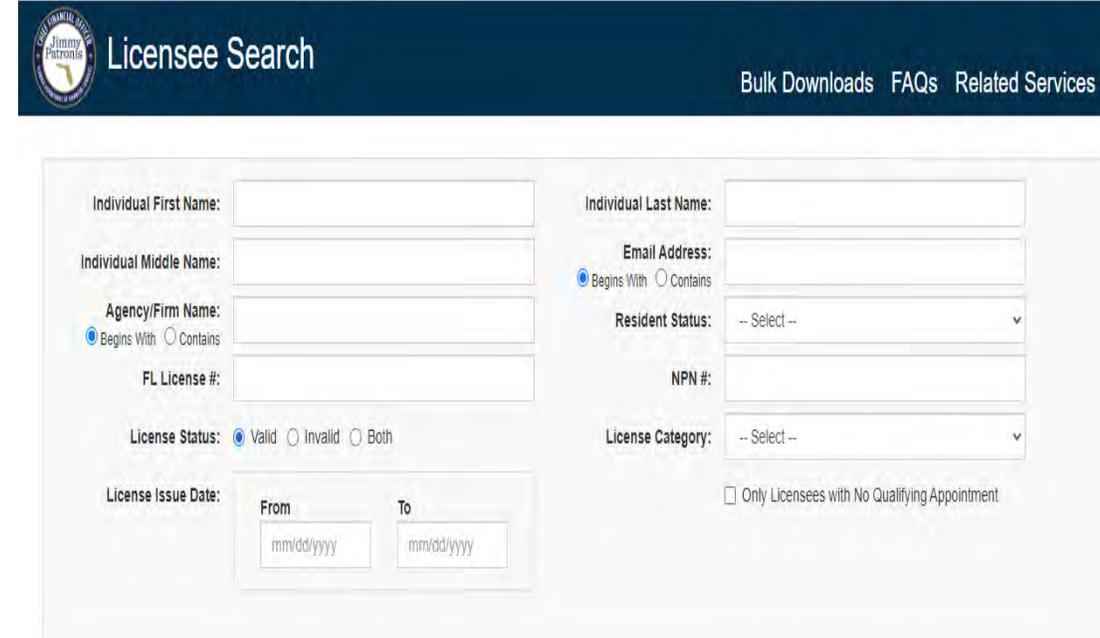
Line of Business

BCBSFL
 HOI
 FCL
 EBMI

You may obtain your Licenses Detail information from the Florida Department of Financial Services website at <https://licenseesearch.fldfs.com/>

Completing the FMO Appointment Form & Agent Agreement- FLDFS Website

- FLDFS Licensee Search Page
- For best search results, the agent should enter their license number in the FL License# Field.
- If the agent does not know their license number; the agent can search by other attributes listed on the screen.



The screenshot shows the 'Licensee Search' page on the FLDFS website. The page has a dark blue header with the 'Jimmy Patronis' logo on the left and navigation links for 'Bulk Downloads', 'FAQs', and 'Related Services' on the right. The main content area is a search form with the following fields and options:

- Individual First Name:** Text input field.
- Individual Middle Name:** Text input field.
- Agency/Firm Name:** Text input field.
- Search Method:** Radio buttons for 'Begins With' (selected) and 'Contains'.
- FL License #:** Text input field.
- License Status:** Radio buttons for 'Valid' (selected), 'Invalid', and 'Both'.
- License Issue Date:** Two date input fields labeled 'From' and 'To', each with a placeholder 'mm/dd/yyyy'.
- Individual Last Name:** Text input field.
- Email Address:** Text input field.
- Search Method (Email):** Radio buttons for 'Begins With' (selected) and 'Contains'.
- Resident Status:** Dropdown menu with '-- Select --'.
- NPN #:** Text input field.
- License Category:** Dropdown menu with '-- Select --'.
- Checkbox:** 'Only Licensees with No Qualifying Appointment'.

Completing the FMO Appointment Form & Agent Agreement

- “Details” section continued.
- The agent can upload a screenshot of the license information found on the FLDFS website; however, it is not required.
- Complete the last question on the Detail page and select “Next”

You may obtain your Licensee Detail information from the Florida Department of Financial Services website at <https://licenseesearch.fdfs.com>. Please capture your Licensee Detail as a screenshot, save the screenshot as a pdf, tiff, doc, docx, xls, or.xlsx document and then upload it as an attachment.

Add Attachments

or drop documents

File type can be: pdf, tiff, doc, docx, xls,.xlsx
File size must be less than 25 MB

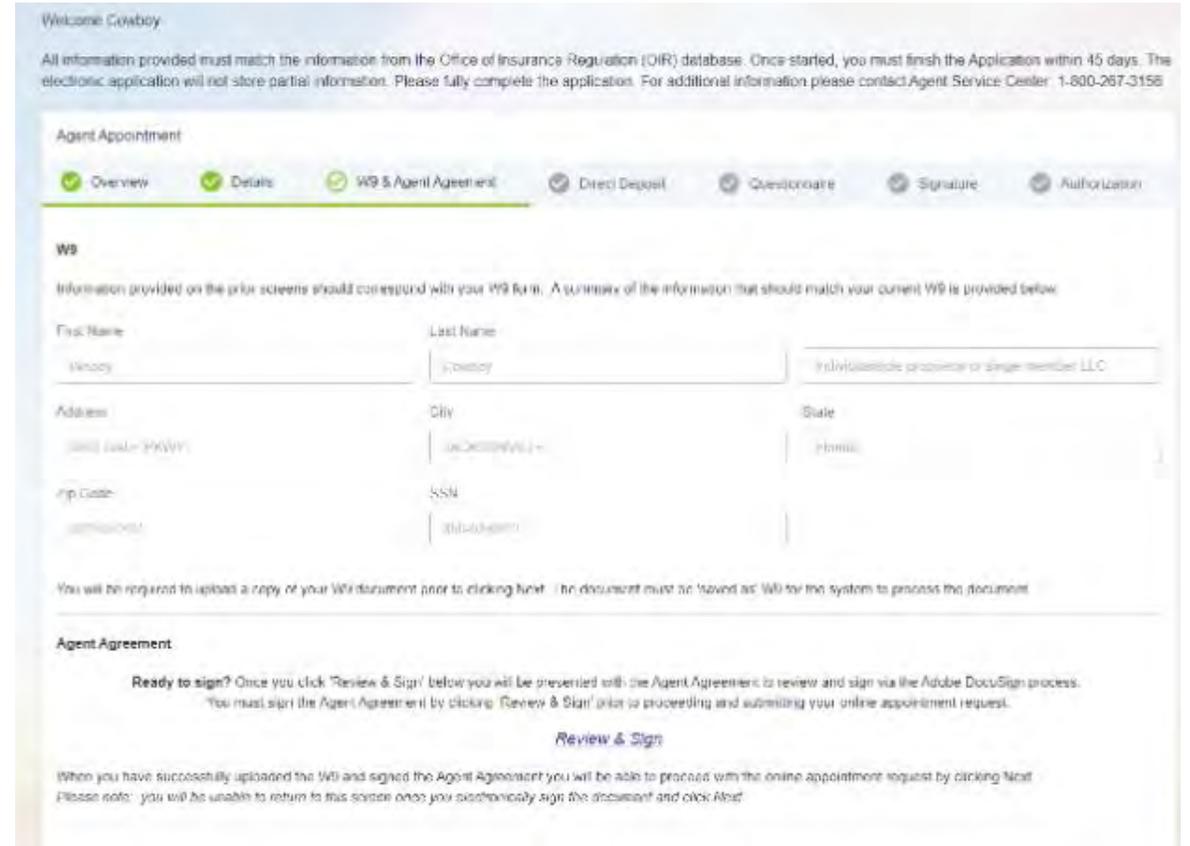
Do you have active Florida Blue appointments?*

Yes No

Completing the FMO Appointment Form & Agent Agreement

- The agent will then be directed to the W9 screen. All information provided must match the information from the Office of Insurance Regulation (OIR) database.
- Information provided on the Overview screen should correspond with the W9 form
 - Box #1- the agents First and Last Name will
 - Box #3- Individual/Sole Proprietor or single-member LLC
 - Box #5- agent address from the Overview screen
 - Box #6- City, State, and Zip Code
 - Part I- agent Social Security Number

**** Note Agents associated with a Lump Sum FMO agency are not required to upload a W9 nor will they be presented with the W9 requirements during the completion of the appointment application.**



Welcome Cowboy

All information provided must match the information from the Office of Insurance Regulation (OIR) database. Once started, you must finish the Application within 45 days. The electronic application will not store partial information. Please fully complete the application. For additional information please contact Agent Service Center: 1-800-267-3158

Agent Appointment

Overview Details **W9 & Agent Agreement** Direct Deposit Questionnaire Signature Authorization

W9

Information provided on the prior screens should correspond with your W9 form. A summary of the information that should match your current W9 is provided below:

First Name: Last Name:

Address: City: State:

Zip Code: SSN:

You will be required to upload a copy of your W9 document prior to clicking Next. The document must be named as 'W9' for the system to process the document.

Agent Agreement

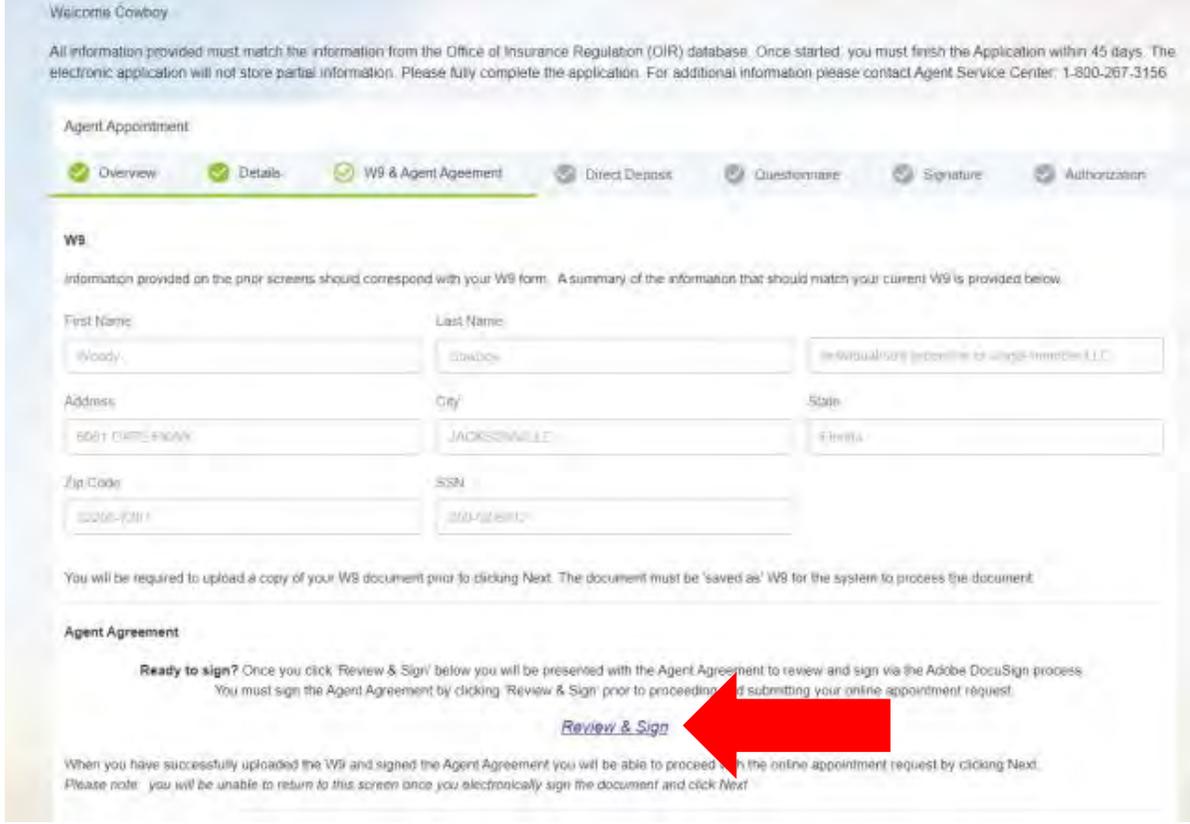
Ready to sign? Once you click 'Review & Sign' below you will be presented with the Agent Agreement to review and sign via the Adobe DocuSign process. You must sign the Agent Agreement by clicking 'Review & Sign' prior to proceeding and submitting your online appointment request.

[Review & Sign](#)

When you have successfully uploaded the W9 and signed the Agent Agreement you will be able to proceed with the online appointment request by clicking Next. Please note: you will be unable to return to this screen once you electronically sign the document and click Next.

Completing the FMO Appointment Form & Agent Agreement

- Next the agent will Review and Sign the Agent Agreement
- The agent will be presented with the Agent Agreement to review and sign via an Adobe DocuSign process. The Adobe will guide the agent through the process and point out the fields that requires completion/signature
- The following pages within the Agent Agreement requires the agent's signature:
 - 1.) FMO Agent Agreement
 - 2.) First Tier Entity Attestation
 - 3.) Agent Telemarketing Attestation
 - 4.) FMO Agent Agreement Signature Page



Welcome Cowboy

All information provided must match the information from the Office of Insurance Regulation (OIR) database. Once started, you must finish the Application within 45 days. The electronic application will not store partial information. Please fully complete the application. For additional information please contact Agent Service Center: 1-800-267-3156

Agent Appointment

Overview Details **W9 & Agent Agreement** Direct Deposit Questionnaire Signature Authorization

W9

Information provided on the prior screens should correspond with your W9 form. A summary of the information that should match your current W9 is provided below.

First Name: Last Name:

Address: City: State:

Zip Code: SSN:

You will be required to upload a copy of your W9 document prior to clicking Next. The document must be 'saved as' W9 for the system to process the document.

Agent Agreement

Ready to sign? Once you click 'Review & Sign' below you will be presented with the Agent Agreement to review and sign via the Adobe DocuSign process. You must sign the Agent Agreement by clicking 'Review & Sign' prior to proceeding with submitting your online appointment request.

[Review & Sign](#)

When you have successfully uploaded the W9 and signed the Agent Agreement you will be able to proceed with the online appointment request by clicking Next. Please note: you will be unable to return to this screen once you electronically sign the document and click Next.

Completing the FMO Appointment Form & Agent Agreement

https://agentpoint-stg&bcbstl.com/aps/ps/prospect/agent-appointment-access/adobe-redirect

Document Signed

You have signed the document you can close this tab and return to continue filling the online form

- Once the Agent Agreement is signed, the agent will receive a confirmation of completion. The agent can then close the tab and will be redirected to the online form for completion.

Completing the FMO Appointment Form & Agent Agreement

- Agents W9 must be named ,saved and entitled “W9” to successfully upload the document.
- The “W9” must be the agents W9. Agency W9 are not accepted and cannot be process.

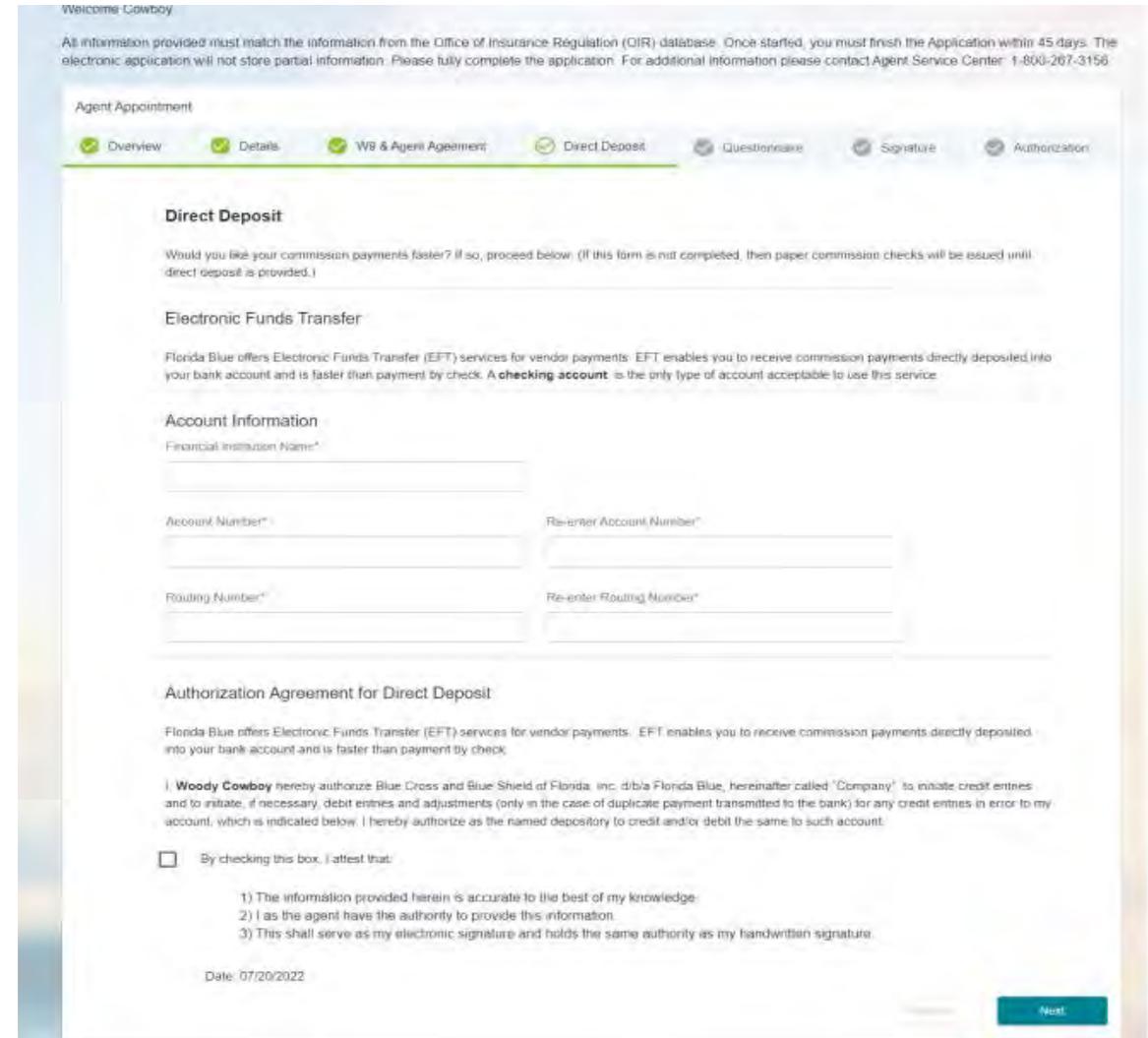
**** Note Agents associated with a Lump Sum FMO agency are not required to upload a W9 nor will they be presented with the W9 requirements during the completion of the appointment application.**

The screenshot displays a web interface for uploading documents. At the top, it says "Add Attachments". Below this is a large dashed green box containing an "Upload Documents" button and the text "or drop documents". Underneath the box, it specifies "File type can be: pdf, tiff, doc, docx, xls, xlsx" and "File size must be less than 25 MB". Below the upload area, there is an "Attachments" section showing a single file: "W9 Wood Cowboy.pdf" with a size of "76.75 KB". To the right of the file name is a status "Uploaded Successfully" with a trash icon. At the bottom left, there is a red error message: "Please Upload W-9 Documents". At the bottom right, there are "Previous" and "Next" navigation buttons.

Completing the FMO Appointment Form & Agent Agreement

- If the agent would like commissions deposited into a Direct Deposit account, the agent must complete/enter all applicable fields marked with an (*) on the Direct Deposit screen.

Don't have Direct Deposit Information? Not a problem, once appointed, the agent will have the ability to log into their online portal set up their Direct Deposit account. If no Direct Deposit is set up, the agent will receive commissions via a paper check.



Welcome Cowboy

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Agent Appointment

Overview Details W9 & Agent Agreement **Direct Deposit** Questionnaire Signature Authorization

Direct Deposit

Would you like your commission payments faster? If so, proceed below. (If this form is not completed, then paper commission checks will be issued until direct deposit is provided.)

Electronic Funds Transfer

Florida Blue offers Electronic Funds Transfer (EFT) services for vendor payments. EFT enables you to receive commission payments directly deposited into your bank account and is faster than payment by check. A **checking account** is the only type of account acceptable to use this service.

Account Information

Financial Institution Name*

Account Number* Re-enter Account Number*

Routing Number* Re-enter Routing Number*

Authorization Agreement for Direct Deposit

Florida Blue offers Electronic Funds Transfer (EFT) services for vendor payments. EFT enables you to receive commission payments directly deposited into your bank account and is faster than payment by check.

I, **Woody Cowboy** hereby authorize Blue Cross and Blue Shield of Florida, Inc. d/b/a Florida Blue, hereinafter called "Company" to initiate credit entries and to initiate, if necessary, debit entries and adjustments (only in the case of duplicate payment transmitted to the bank) for any credit entries in error to my account, which is indicated below. I hereby authorize as the named depository to credit and/or debit the same to such account.

By checking this box, I attest that:

- 1) The information provided herein is accurate to the best of my knowledge.
- 2) I as the agent have the authority to provide this information.
- 3) This shall serve as my electronic signature and holds the same authority as my handwritten signature.

Date: 07/20/2022

Next

Completing the FMO Appointment Form & Agent Agreement

Completing the agent Questionnaire

The agent is required to all questions before proceeding to the next screen.

Agent Appointment

Overview
 Details
 W9 & Agent Agreement
 Direct Deposit
 Questionnaire
 Signature
 Authorization

Questionnaire

1. Have you (or the partners, members, directors, officers, or agents of this company/ corporation/partnership) ever been convicted of a crime other than a minor traffic violation (e.g. felony, misdemeanor)? *
2. Have you (or the partners, members, directors, officers, or agents of this company/ corporation/partnership) ever been fined, reprimanded, sanctioned, or been the subject of a consent decree in any state for a violation of insurance laws, HMO regulations, or other administrative regulations?*
3. Have you (or the partners, members, directors, officers, or agents of this company/ corporation/ partnership) ever been refused license to sell insurance products, or had your license suspended or revoked by any state?*
4. Have you (or the partners, members, directors, officers, or agents of this company/ corporation/partnership) ever been employed by an insurance/HMO company, or another organization providing for or assisting with the administration of health care or other employee benefits, where the employment contract was terminated or non-renewed because of allegations of wrongdoing?*
5. Have you (or the partners, members, directors, or agents of this company/corporation/ partnership) ever surrendered any insurance or HMO license, whether voluntary or involuntary?*
6. Have you (or the partners, members, directors, or agents of this company/corporation/ partnership) ever declared bankruptcy, had a lien placed against you or your company, been a judgment debtor, or had other problems with your (or your company's) credit history?*
7. Are you (or the partners, members, directors, or agents of this company/corporation/ partnership) currently named party in any lawsuit? *
8. Are you currently indebted to an insurance carrier or insurer? *
9. Has an application for bond ever been declined to you? *
10. Have you ever been short in accounts with any employer?*

Add Attachments

or drop documents

File type can be: pdf, tiff, doc, docx, xls, xlsx
File size must be less than 25 MB

Completing the FMO Appointment Form & Agent Agreement

- The agent must sign the appointment form
- The agent must enter their full name and the current date is pre-populated.

Welcome Cowboy

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Agent Appointment

Overview
 Details
 W9 & Agent Agreement
 Direct Deposit
 Questionnaire
 Signature
 Authorization

Florida Blue will be obtaining a complete list of companies with which you hold a current agent appointment as listed on the State of Florida Office of Insurance Regulation (OIR) website.

I certify that I have read and understand the items on this form and that the answers to the above questions are true and complete to the best of my knowledge. If accepted I agree to comply with all the regulations of Florida Blue and the State of Florida Office of Insurance Regulations (OIR). I understand and agree that I am not permitted to solicit insurance until I have received my license from the OIR.

NOTICE: "The Fair Credit Reporting Act" requires that we advise you that routine inquiry may be made during our initial or subsequent processing of your application for sponsorship for license which will provide applicable information regarding your health, past history, character, general reputation, personal characteristics and mode of living. The information obtained in such an inquiry may be released to any third party, including State and Federal regulatory bodies. Upon your written request additional information as to the nature and scope of the inquiry, if one is made will be provided.

In Signing this application for appointment, I certify that I have not been convicted of any criminal felony involving dishonesty, breach of trust, or been convicted of an offense under Section 1033 of the Violent Crime and Law Enforcement Act of 1994. Furthermore, I agree to immediately inform Florida Blue of any conviction of the types described in the preceding sentence.

Signature:

Woody Cowboy Current Date: 07/20/2022

I accept
 I decline

Add Attachments

or drop documents

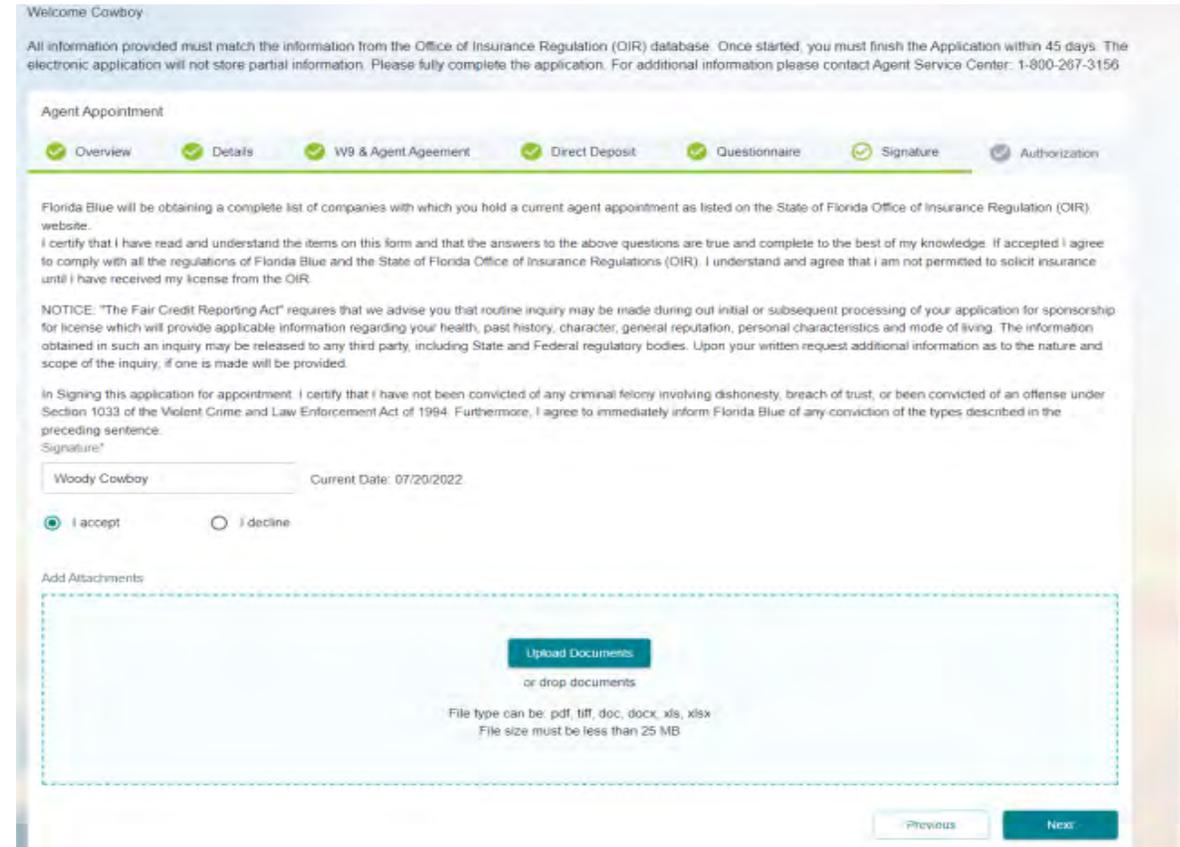
 File type can be: pdf, tiff, doc, docx, xls, xlsx

 File size must be less than 25 MB

Completing the FMO Appointment Form & Agent Agreement

- The final step is authorizing and signing the background consent. All agents are required to complete and pass a background screening upon initial enrollment and subsequently every 2 years upon appointment renewal.
- The agent must enter their full name and the date is pre-populated with the current date
- The Agent Appointment Form and Agent Agreement is now complete, and the agent will receive a confirmation.

The onboarding process will now begin!

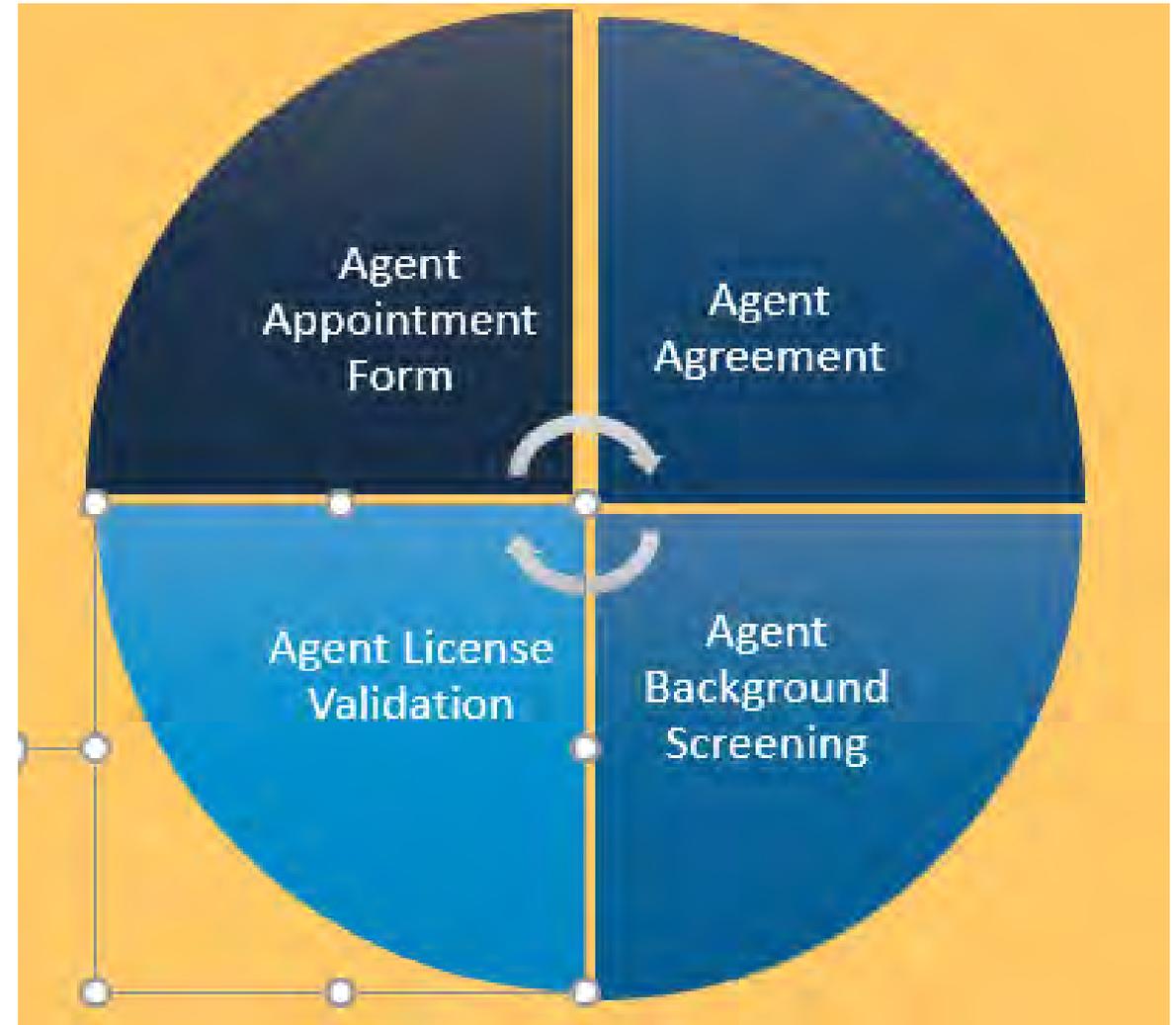




Onboard – Agent Activation

Step 2:

- Once the Agent Agreement and the Appointment forms are successfully submitted, the agent onboarding process begins!
- This process can take 5-10 business days which includes, validating the completed Agent Agreement, Agent Appointment form, validating the agents license with FLDFS, initiating and completing the background screening process.



Onboard – Agent Activation

- A background check will be ordered which can take up to 3-5 business days or more depending on the county or counties that the agent currently or previously resided in.
- Once the agents license is deemed valid and the background screening is completed/ approved, the agent will then be appointed with FLDFS. The agent will also be activated within Florida Blue's internal systems
- **Note: The Agency Owner or Tier III delegate can check the status of the agent onboarding process by logging into AgentPoint using their login credentials.**

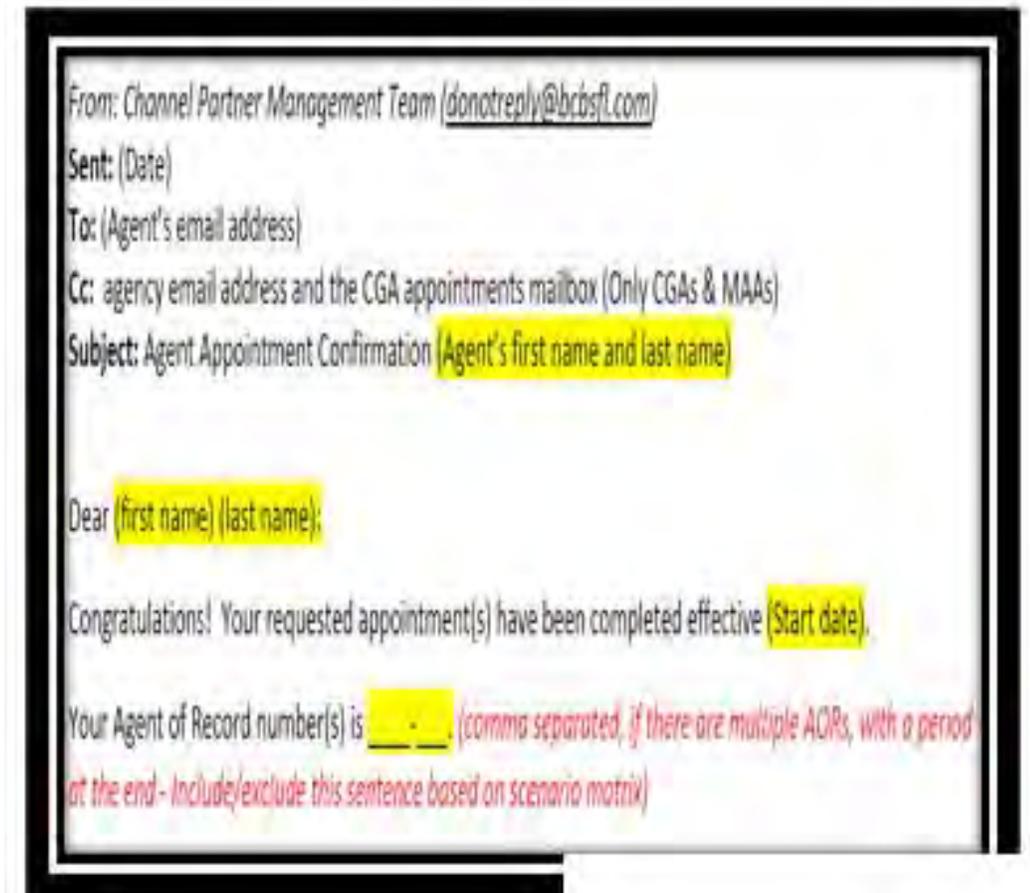


Onboard – Agent Activation

Once the agent is appointed with FLDFS and activated within Florida Blue’s internal systems, the agent will receive a “Welcome Email.” The email will be immediately sent to the agents email address that was provided on the agent appointment form.

The subject of the email will read as: **Florida Blue Medicare Contracting**

Note: The Welcome Email is not a Ready to Sell Notification. It is sent to notify the agent that they are now appointed with FLDFS and activated in Florida Blue internal systems. The FMO agent will be RTS once all Medicare training has been completed.



Onboard – Agent Activation

The Welcome Email will include some of the following attributes:

- Effective date of the Agent appointment
- FMO Agents unique 7-digit Florida Blue Medicare Agent of Record number
- How to Register for AgentPoint
- How to complete required CMS Medicare training
- And More!

It is now time for the Agent to register for their convenient online portal. See the next few slides that will provide an overview of Florida Blue's online agent self-service tool, AgentPoint.

From: Channel Partner Management Team (donotreply@bcbsfl.com)

Sent: (Date)

To: (Agent's email address)

Cc: agency email address and the CGA appointments mailbox (Only CGAs & MAAs)

Subject: Agent Appointment Confirmation (Agent's first name and last name)

Dear (first name) (last name):

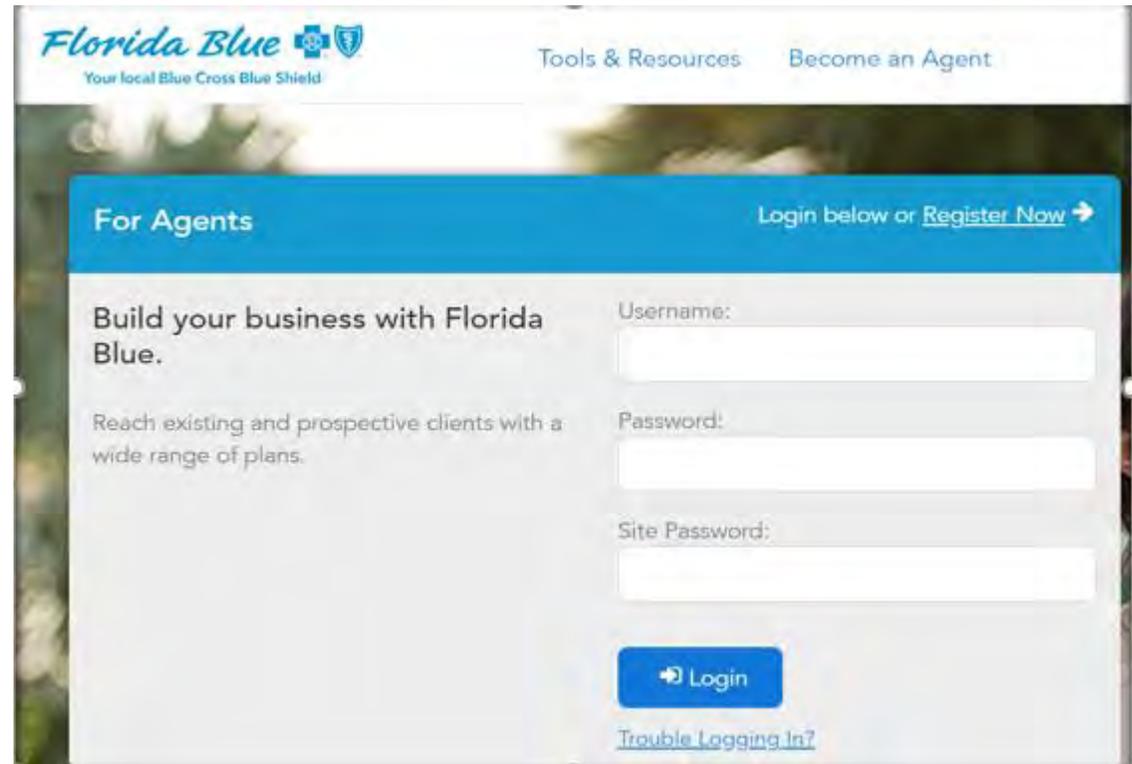
Congratulations! Your requested appointment(s) have been completed effective (Start date).

Your Agent of Record number(s) is ____ - ____. (comma separated, if there are multiple AORs, with a period at the end - Include/exclude this sentence based on scenario matrix)

What is Agent Point?

AgentPoint is Florida Blue's online Agency and Agent information management and Self-Service portal. It was designed to meet the needs of our business partners by offering quick and intuitive access to tools, resources and insights that help the agencies and agents manage their business and achieve success.

Within this portal the agent will have access to update the agents' demographics, ability to view and manage current book of business, access commission statements and much more!



The screenshot shows the Florida Blue Agent Point login interface. At the top left is the Florida Blue logo with the tagline "Your local Blue Cross Blue Shield". To the right are links for "Tools & Resources" and "Become an Agent". The main content area has a blue header that says "For Agents" and a link "Login below or Register Now" with a right-pointing arrow. Below this, the text reads "Build your business with Florida Blue." followed by "Reach existing and prospective clients with a wide range of plans." To the right of this text are three input fields: "Username:", "Password:", and "Site Password:". Below the input fields is a blue "Login" button with a right-pointing arrow. At the bottom right is a link "Trouble Logging In?".

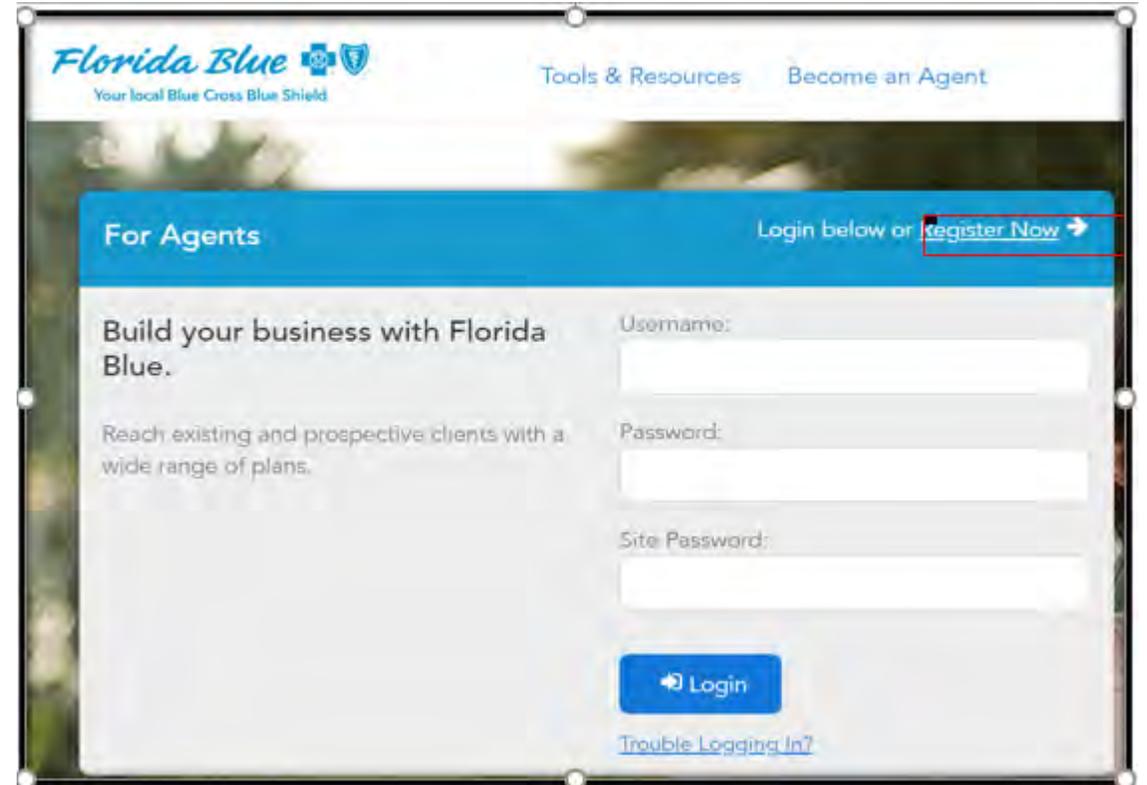
How to register for Agent Point

Step 3:

Instructions on how to register for Agent Point can also be found in the agents "Welcome Email"

The website to register for Agent Point is www.FloridaBlue.com. The agent will land on the "For Agents" login page and must select the "Register Now" link or select the following link and choose "Agent" from the drop-down feature

<https://registration.bcbsfl.com/ecir/public/AgentNewUserRegistration.do>



Florida Blue 
Your local Blue Cross Blue Shield

Tools & Resources Become an Agent

For Agents Login below or [Register Now](#) →

Build your business with Florida Blue.

Reach existing and prospective clients with a wide range of plans.

Username:

Password:

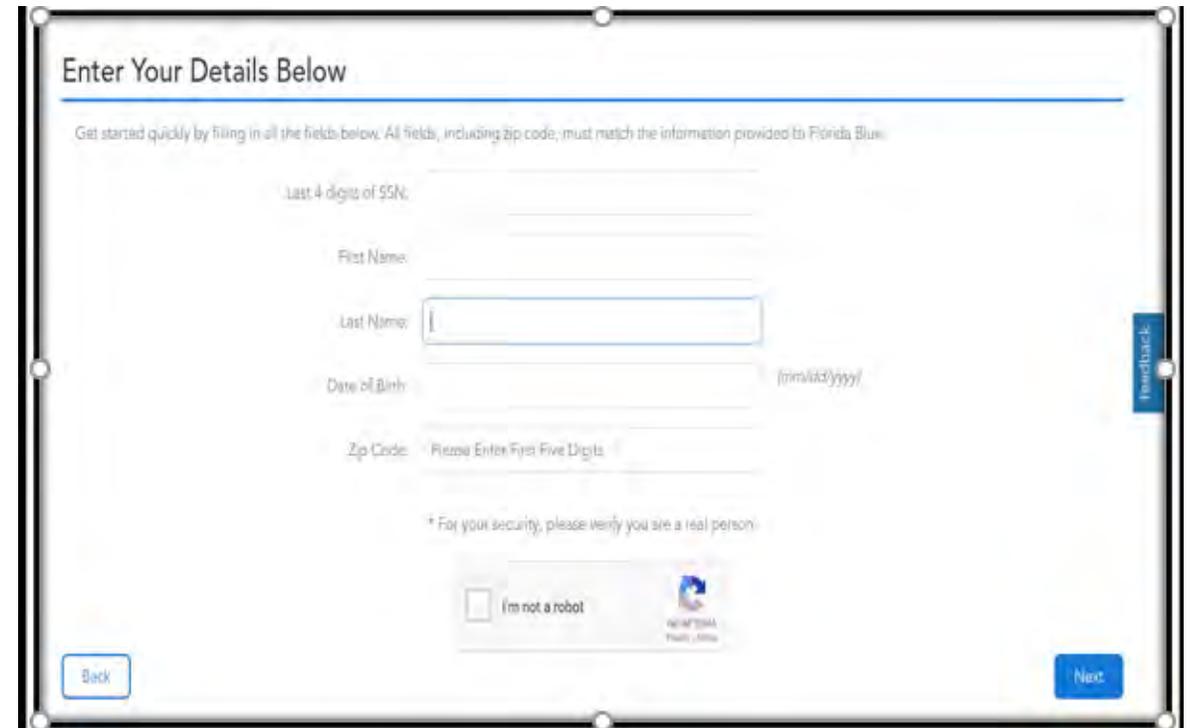
Site Password:

Login

[Trouble Logging In?](#)

Registering for Agent Point

- Enter required details exactly how it was submitted on the agent appointment form. Enter the last 4 digits of the SSN, First name, Last name, Date of Birth and Zip Code.
- Complete the “I’m not a robot” reCaptcha and select the “Next” button.
- If you receive an error, please make sure the data is entered exactly how it was entered on the agent appointment form.
- If you continue to receive an error while attempting to register, please contact the **Agent Service Center (ASC) at 1-800-267-3156.**
-



The screenshot shows a web form titled "Enter Your Details Below". Below the title is a blue horizontal line and a note: "Get started quickly by filling in all the fields below. All fields, including zip code, must match the information provided to Florida Blue." The form contains several input fields: "Last 4 digits of SSN", "First Name", "Last Name" (with a cursor in the text box), "Date of Birth" (with a placeholder "(mm/dd/yyyy)"), and "Zip Code" (with a placeholder "Please Enter First Five Digits"). At the bottom, there is a reCAPTCHA section with the text "* For your security, please verify you are a real person:" and a checkbox labeled "I'm not a robot" next to a reCAPTCHA logo. Navigation buttons "Back" and "Next" are located at the bottom left and right respectively. A vertical "Feedback" button is on the right side.

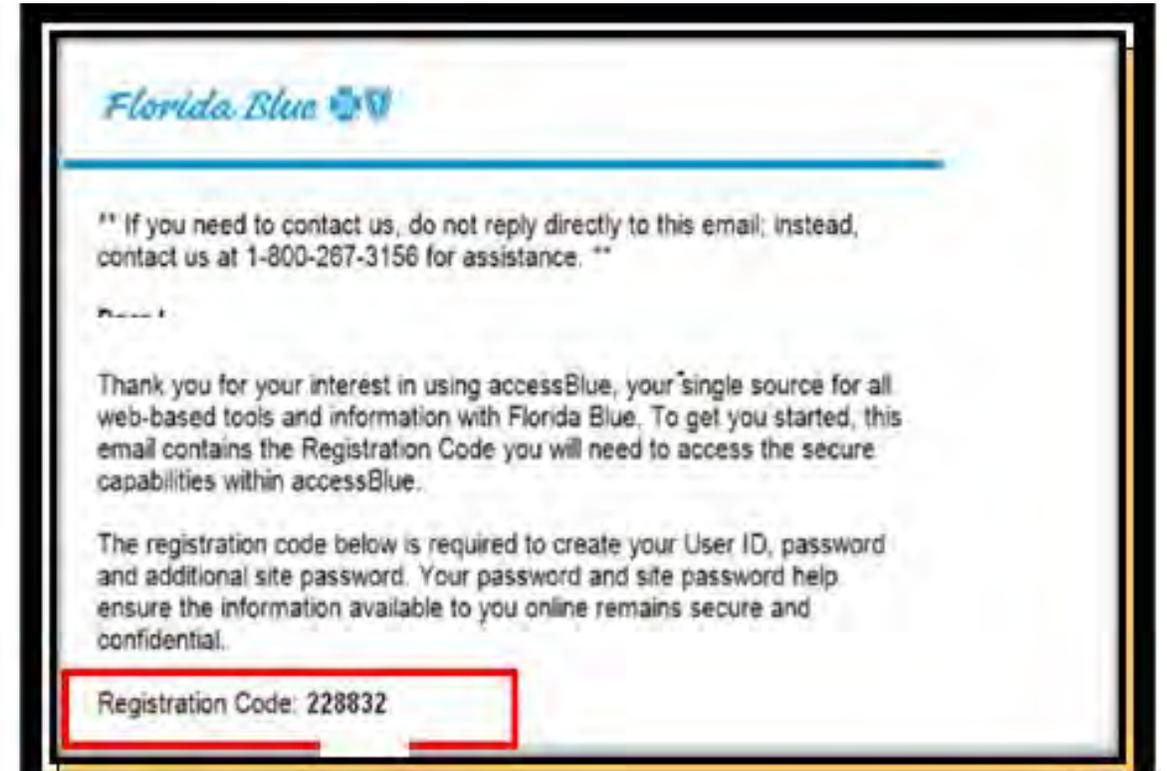
Registering for Agent Point

- Select “Click here to receive a Registration Code” button.
- The page will refresh to indicate that the email was sent.
- **Note:** the Registration Code is not the same as the agents 7-digit agent of record code



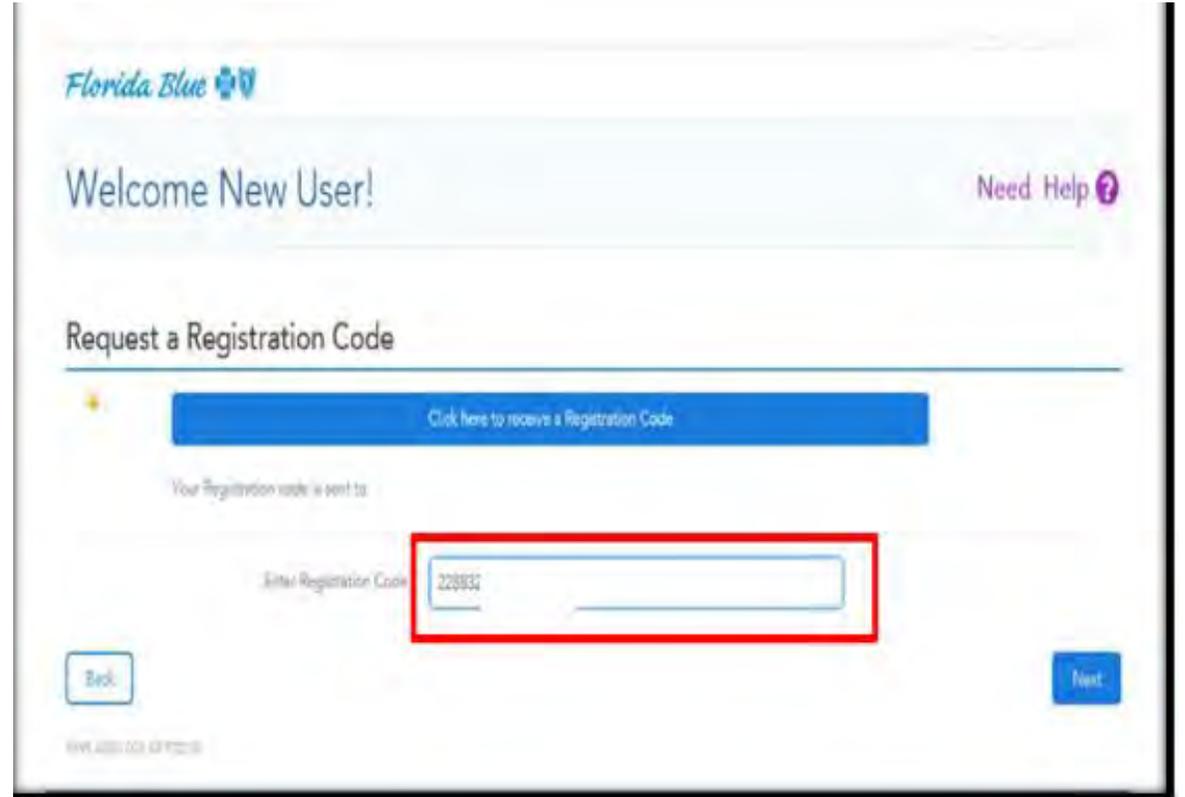
Registering for Agent Point

- An email will be sent to the agent's email address which contains the registration code. The email subject will be: **Florida Blue Registration Code for Self-Service Tools**
- **Note: Do Not Respond to this email**



Registering for Agent Point

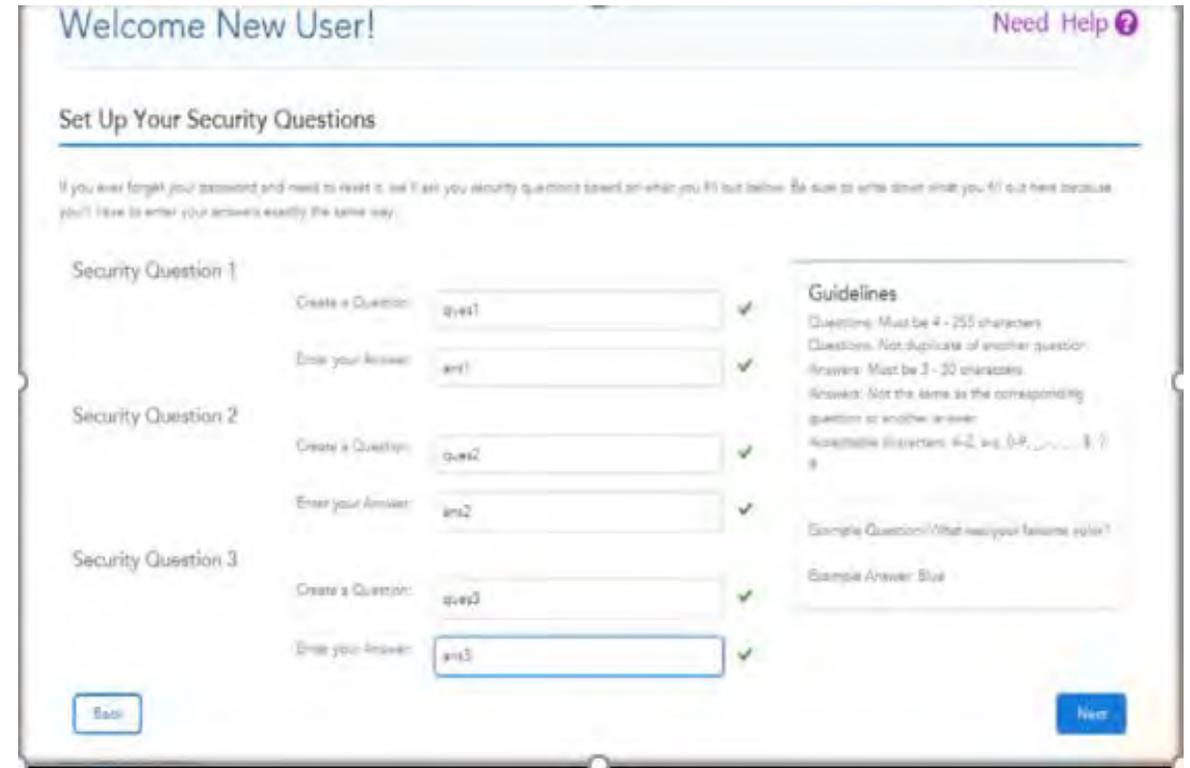
- Return to the registration page and enter the registration code in the text box and then select “Next”
- Create a new User Id, Password,
- re-enter the Password and select “Next”
- Create a Site Password, re-enter the Site Password for confirmation and select “Next”



The screenshot shows the Florida Blue Medicare registration interface. At the top, it says "Welcome New User!" with a "Need Help?" link. Below this is the "Request a Registration Code" section. A blue button labeled "Click here to receive a Registration Code" is visible. Underneath, it says "Your Registration code is sent to:" followed by a text box containing the code "228832". A red rectangular box highlights this text box. At the bottom of the form, there are "Back" and "Next" buttons.

Registering for Agent Point

- Create three Security Questions, provide the answers



Welcome New User! [Need Help?](#)

Set Up Your Security Questions

If you ever forget your password and need to reset it, we'll ask you security questions based on what you fill out below. Be sure to write down what you fill out here because you'll have to enter your answers exactly the same way.

Security Question 1	Create a Question: <input type="text" value="ques1"/>	✓
	Enter your Answer: <input type="text" value="ans1"/>	✓
Security Question 2	Create a Question: <input type="text" value="ques2"/>	✓
	Enter your Answer: <input type="text" value="ans2"/>	✓
Security Question 3	Create a Question: <input type="text" value="ques3"/>	✓
	Enter your Answer: <input type="text" value="ans3"/>	✓

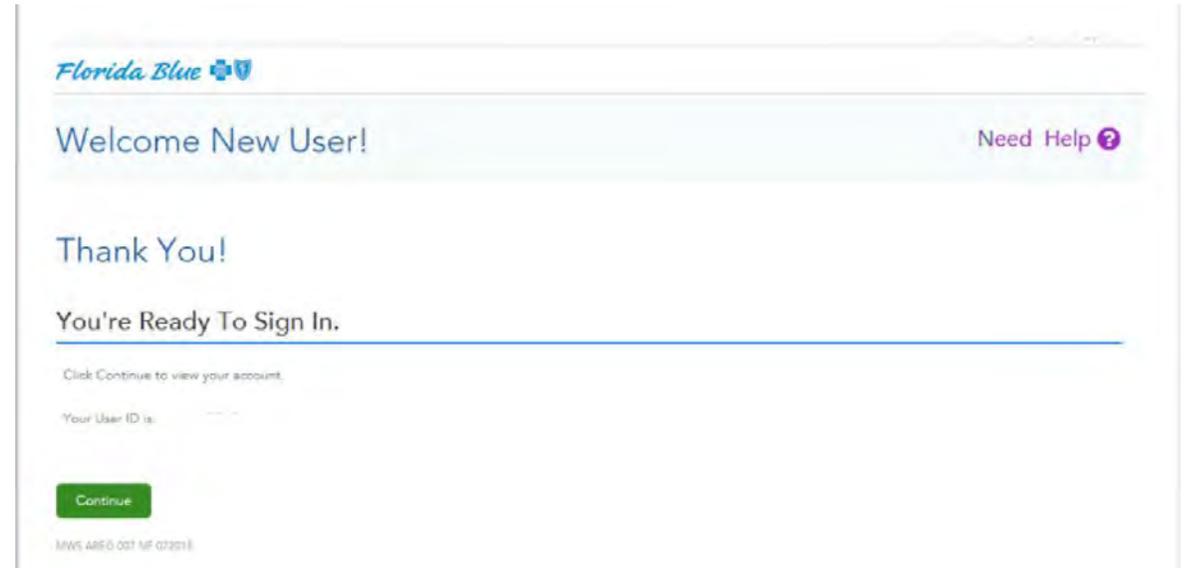
Guidelines

Questions: Must be 4 - 255 characters
Questions: Not duplicate of another question
Answers: Must be 3 - 30 characters
Answers: Not the same as the corresponding question or another answer
Acceptable characters: A-Z, a-z, 0-9, _ . , - ' / ?

Sample Question: What was your favorite color?
Sample Answer: Blue

Registering for Agent Point

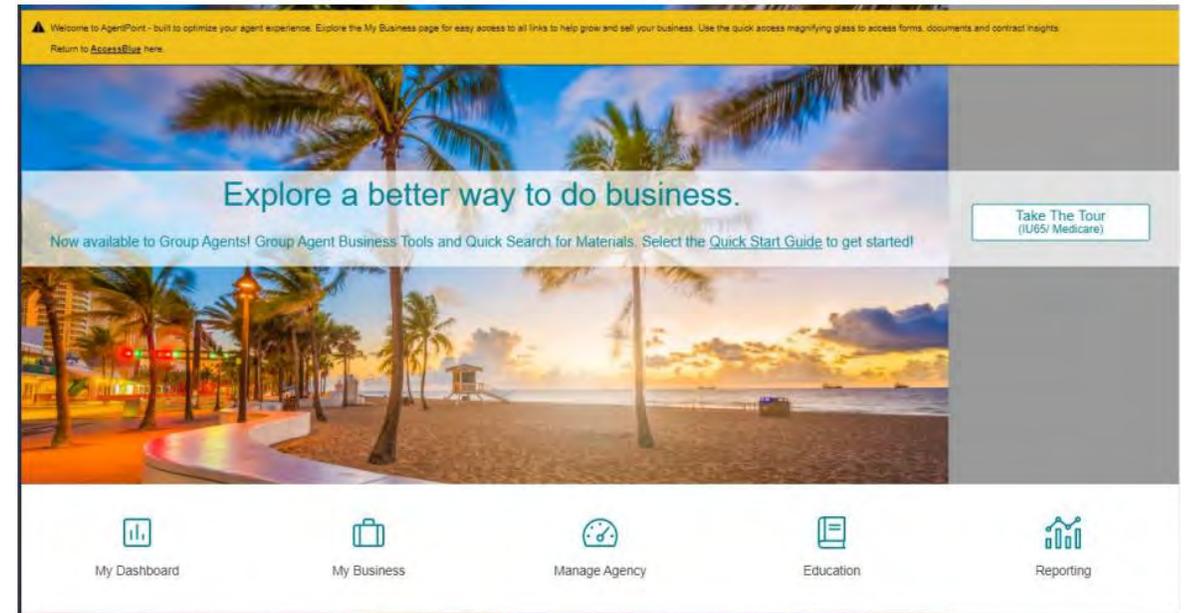
- After successful registration, the confirmation page will display.
- The agent's user id is also displayed.
- Select “Continue” to be redirected to AgentPoint.



Completing CMS Medicare Certifications

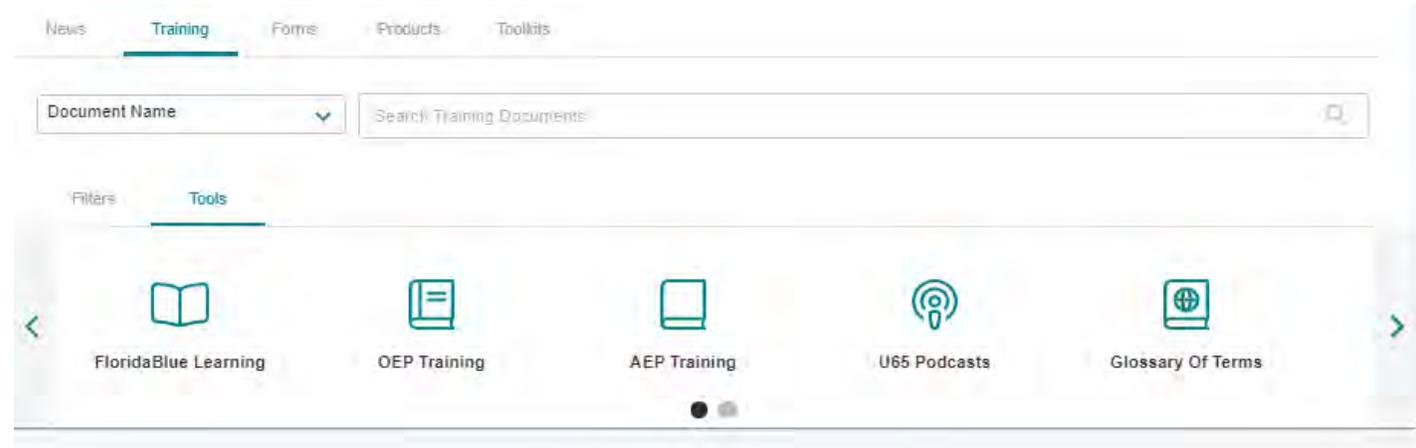
Step 4:

- Once the agent has successfully registered for AgentPoint, the agent is now ready to log in and complete all required CMS Medicare training.
- From the Agent Point Landing Page, select the “Education” icon
- **Note: Annual CMS Medicare Training is required.**



Completing Medicare Certifications

- Select “Training” and then select “Tools” and then select FloridaBlue Learning on the bottom left side of the screen



Completing Medicare Certifications

- From the Welcome Page, click the “Self” icon in the top left corner



Completing Medicare Certifications

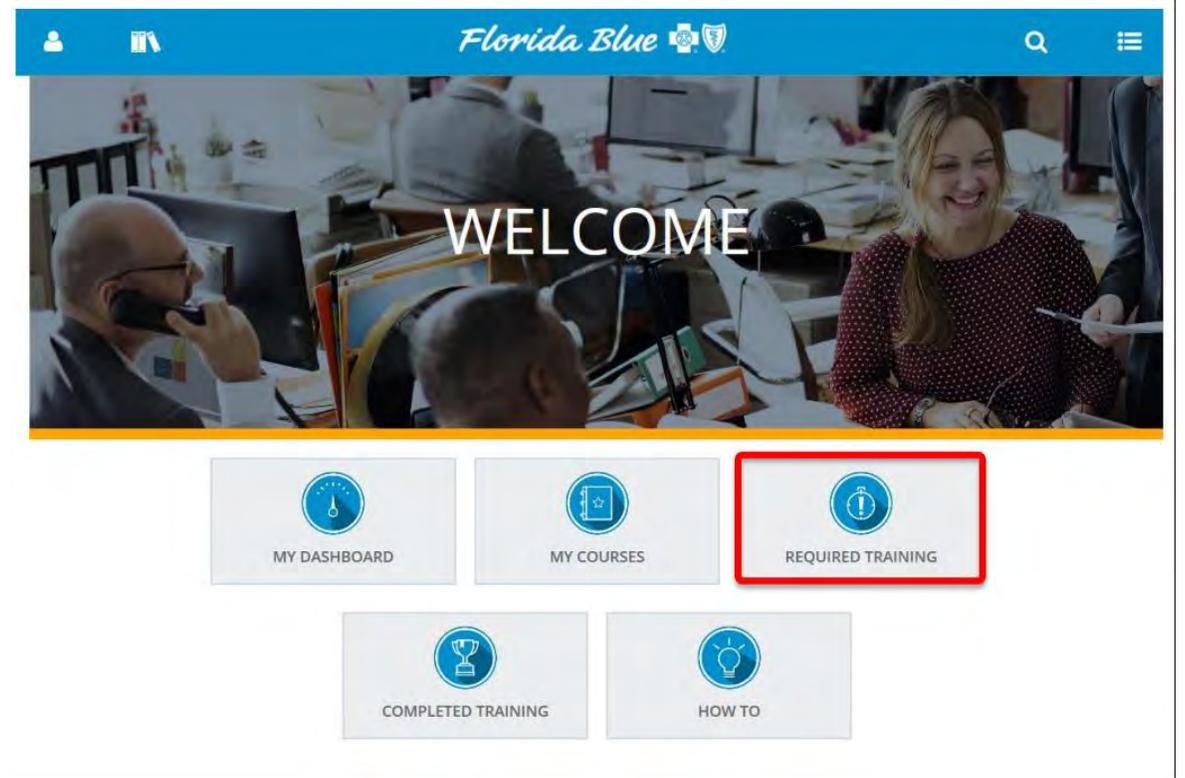
- Select “Learning” from the pull-down menu

Select “LEARNING” from the pull-down menu.

The screenshot shows the Florida Blue Medicare portal interface. On the left, a dark sidebar menu is open, listing various navigation options. The 'LEARNING' option is highlighted with a red rectangular box. The main content area features a blue header with the Florida Blue logo and a search icon. Below the header is a large banner image with the word 'WELCOME' overlaid in white. Underneath the banner, there are several interactive tiles: 'MY TEAM' and 'MY TEAM REPORTS' (both with orange icons), 'MY DASHBOARD', 'MY COURSES', and 'REQUIRED TRAINING' (all with blue icons). A lightbulb icon is visible at the bottom center of the dashboard area.

Completing Medicare Certifications

- If required, the next slides will walk you through registering for the Medicare CORE curriculum. Select “Required Training”



Completing Medicare Certifications

- Click the curriculum registration button to the left of the curriculum title to register for the curriculum.
- **Note:** The year, course and module titles are for instructional purposes only.



The screenshot shows the 'TRAINING ANALYSIS' section of the Florida Blue interface. It includes a search bar, filter options, and a table of training activities. The table has columns for Name, Code, Priority, Assigned Date, Due Date, Last Completed Date, Expiration Date, Assignment Type, and Assignment Status. One row is highlighted in blue, representing the 'Curriculum 2019 Medicare Core Curriculum' with code 'E_EMP_00053' and an assigned date of '7/21/2018'. A red box highlights a small icon to the left of the curriculum name, which is the registration button mentioned in the text.

Name	Code	Priority	Assigned Date	Due Date	Last Completed Date	Expiration Date	Assignment Type	Assignment Status
Curriculum 2019 Medicare Core Curriculum	E_EMP_00053		7/21/2018				Required	Assigned

Completing Medicare Certifications

- Once successfully registered, click the “Start” button to the right of the course title and the course will open

The screenshot displays the Florida Blue Medicare portal interface. At the top, there is a blue header with the Florida Blue logo and the word 'MEDICARE'. Below the header, a green banner contains a notification: 'Congratulations! You have completed the registration process. Please visit at the 2020 eHealth Medicare Core Curriculum and complete your certification process.' The main content area shows the '2020 eHealth Medicare Core Curriculum' with a 'Completion Status' of '0%' and an 'OPTIONS' button. The curriculum is divided into four sections: 1. Introduction Why is Florida Wonderful..., 2. Introduction to Business Ethics, Integrity and Compliance..., 3. Compass Code of Ethical Business Conduct..., and 4. Privacy and Security Training. Each section has a 'START' button. The 'START' button for the first section is highlighted with a red box. The status of each section is 'REGISTERED'.

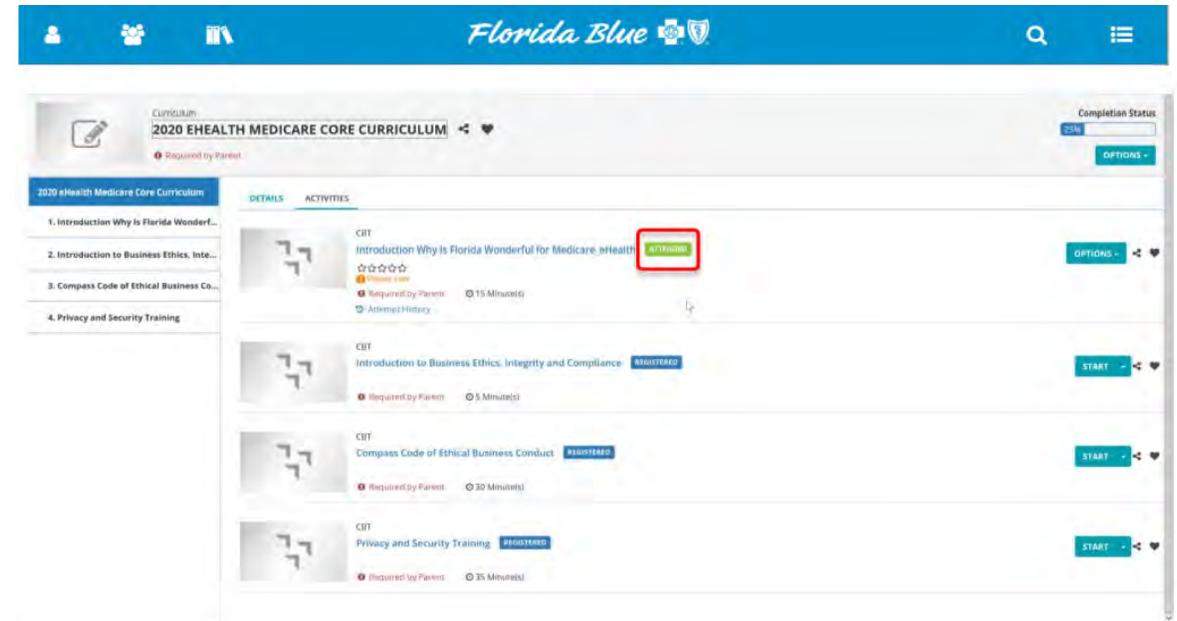
Completing Medicare Certifications

- Once the course is completed, close the course window as instructed. The system will automatically recognize completion of the course and will display the “Topic Status” as “Completed”. Click “OK” to return to the curriculum.
- **Note:** If the agent does not see “Completed”, the course is not complete.
- The agent must disable the pop-up blocker and restart the course to complete.



Completing Medicare Certifications

- When the agent returns to the curriculum, the “Attended” course indicator will indicate the course was completed.



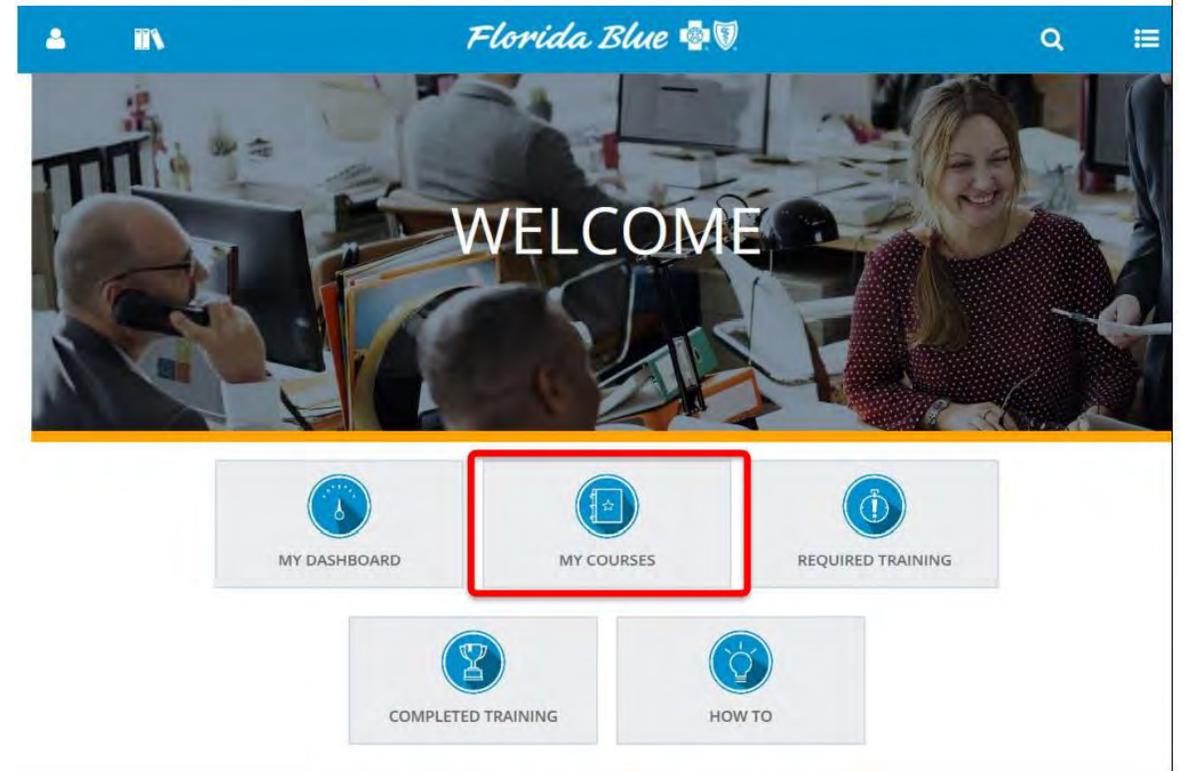
Completing Medicare Certifications

- To begin the next course, click the start button to the right of the course title.
- The agent must complete all steps until the curriculum is completed.
- **Note:** the modules and courses must be completed in sequential order.

The screenshot displays the Florida Blue Medicare Certification interface. At the top, there is a blue header with the Florida Blue logo and navigation icons. Below the header, the main content area shows a curriculum titled "2020 EHEALTH MEDICARE CORE CURRICULUM" with a completion status of 20%. The curriculum is divided into four modules, each with a "START" button. The second module, "Introduction to Business Ethics, Integrity and Compliance", is highlighted with a red box around its "START" button. The first module, "Introduction Why to Florida Wonderful for Medicare, eHealth", is marked as "COMPLETED". The other two modules, "Compass Code of Ethical Business Conduct" and "Privacy and Security Training", are marked as "REGISTERED".

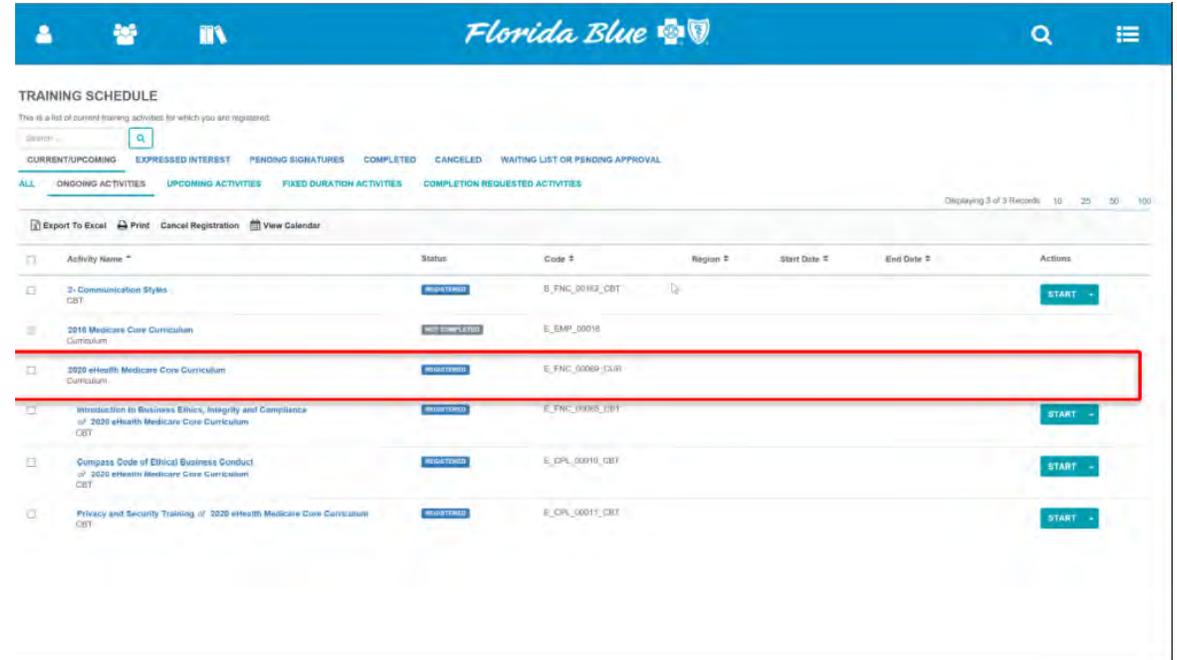
Completing Medicare Certifications

- If for any reason the agent needs to exit out of or close the training session, then return to it at later time, follow these steps.
- The agent must log back in Florida Blue Learning. Once on the Home page, click the “My Courses” button



Completing Medicare Certifications

- The Training Schedule page is displayed. The agent must click the title of the curriculum they want to continue.



TRAINING SCHEDULE
This is a list of current training activities for which you are registered.

Search:

CURRENT/UPCOMING EXPRESSED INTEREST PENDING SIGNATURES COMPLETED CANCELED WAITING LIST OR PENDING APPROVAL

ALL ONGOING ACTIVITIES UPCOMING ACTIVITIES FIXED DURATION ACTIVITIES COMPLETION REQUESTED ACTIVITIES

Export To Excel Print Cancel Registration View Calendar

Activity Name	Status	Code	Region	Start Date	End Date	Actions
Communication Styles CBT	REGISTERED	B_FNC_20182_CBT				START
2018 Medicare Core Curriculum Curriculum	NOT COMPLETED	E_EMP_00018				
2020 eHealth Medicare Core Curriculum Curriculum	REGISTERED	E_FNC_00009_CBT				START
Introduction to Business Ethics, Integrity and Compliance of 2020 eHealth Medicare Core Curriculum CBT	REGISTERED	E_FNC_00005_CBT				START
Compass Code of Ethical Business Conduct of 2020 eHealth Medicare Core Curriculum CBT	REGISTERED	E_CPL_00010_CBT				START
Privacy and Security Training of 2020 eHealth Medicare Core Curriculum CBT	REGISTERED	E_CPL_00011_CBT				START

Displaying 3 of 3 Records 10 25 50 100

Completing Medicare Certifications

- To begin the next course, click the start button to the right of the course title.
- **Note: the modules must be completed in sequential order.**

The screenshot displays the Florida Blue Medicare Core Curriculum interface. At the top, the Florida Blue logo and 'MEDICARE' are visible. The main content area shows a curriculum titled '2020 EHEALTH MEDICARE CORE CURRICULUM' with a completion status of 25%. Below this, a list of four modules is shown:

Module Number	Module Title	Status	Duration	Action
1.	Introduction Why is Florida Wonderful...	ATTENDED	15 Minutes	OPTIONS
2.	Introduction to Business Ethics, Integrity and Compliance	REGISTERED	5 Minutes	START
3.	Compass Code of Ethical Business Conduct	REGISTERED	30 Minutes	START
4.	Privacy and Security Training	REGISTERED	35 Minutes	START

Completing Medicare Certifications

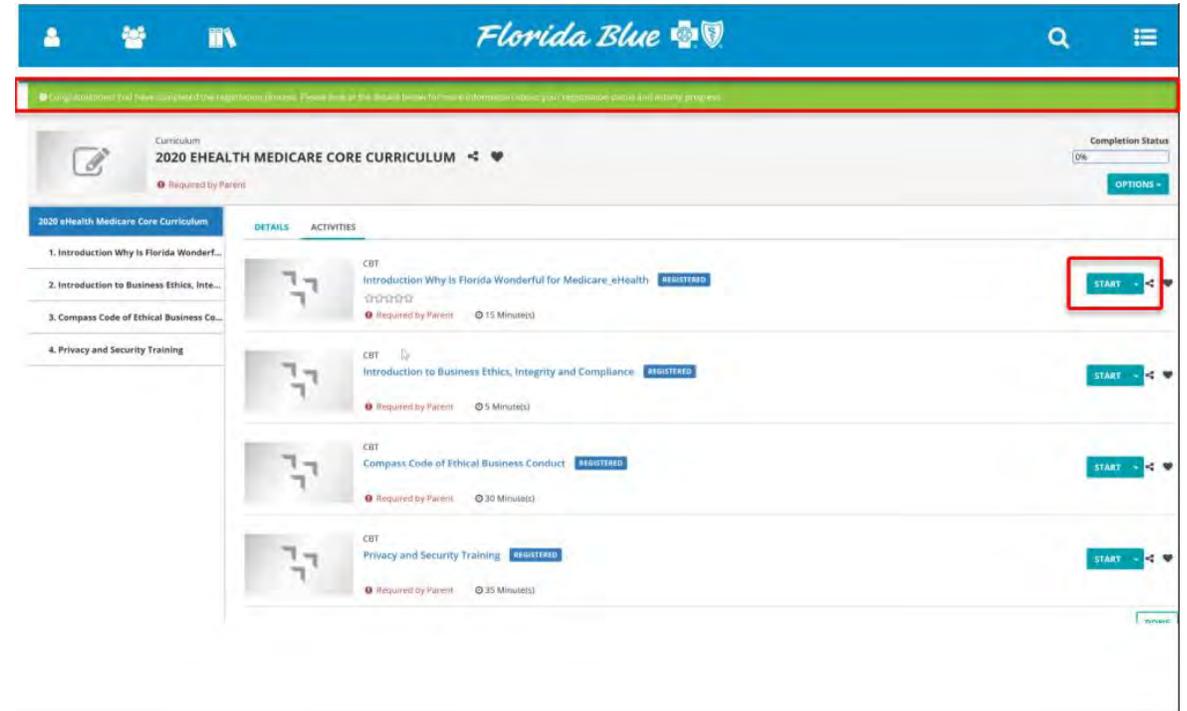
- If the agent experiences any registration issues, follow these steps:
- After clicking the registration button, if the agent has already attended any of the training in this curriculum, the agent may receive this window. The agent will just click the submit button to complete the registration.

The screenshot displays the Florida Blue Medicare registration interface. On the left, a sidebar shows the '2019 MEDICARE CORE CURRICULUM' with a 'Curriculum' section and a note 'No Estimated Duration'. The main area is titled 'REGISTRATION ISSUES' and includes a checkbox for 'Skip registration for already attended activities'. Below this is a table with two columns: 'Activity Name' and 'Issues'. The table lists several activities, with '2019 AEP Course Introduction' marked as 'ALREADY ATTENDED'. At the bottom right, there are two buttons: 'CANCEL' and 'SUBMIT', with the 'SUBMIT' button highlighted by a red box.

Activity Name	Issues
2019 Medicare Core Curriculum	
2019 AEP Course Introduction	ALREADY ATTENDED
Core Module 1 - Medicare Basics: Overview of Medicare	
Module 1 Introduction - Medicare Basics	
Original Medicare and Covered Services	
Medicare Advantage Part C	
Medicare Prescription Drug Coverage	
Applicable Premiums Amounts	
Medicare Beneficiary Rights and Protections	

Completing Medicare Certifications

- Congratulations! The agent has completed the registration process.
- Upon successful completion of Agent Point registration and all required Medicare Certifications, the agent will be ready to sell (RTS).



Completing Medicare Certifications

- The agent will also receive a “RTS” alert email.

From: Channel Partner Management Team <ChannelPartnerManagementTeam@bcbsfl.com>

Sent: Wednesday, June 22, 2022 2:43 PM

To: <Agency and Agents email here >

Subject: -Congratulations! You are Ready to Sell for Florida Blue Medicare CESAR HIDALGO

]

Dear **{Agent Name}**:

Congratulations! You are Ready to Sell for Florida Blue Medicare [effective date].

Your Agent of Record number(s) is [7-digit AOR number].|

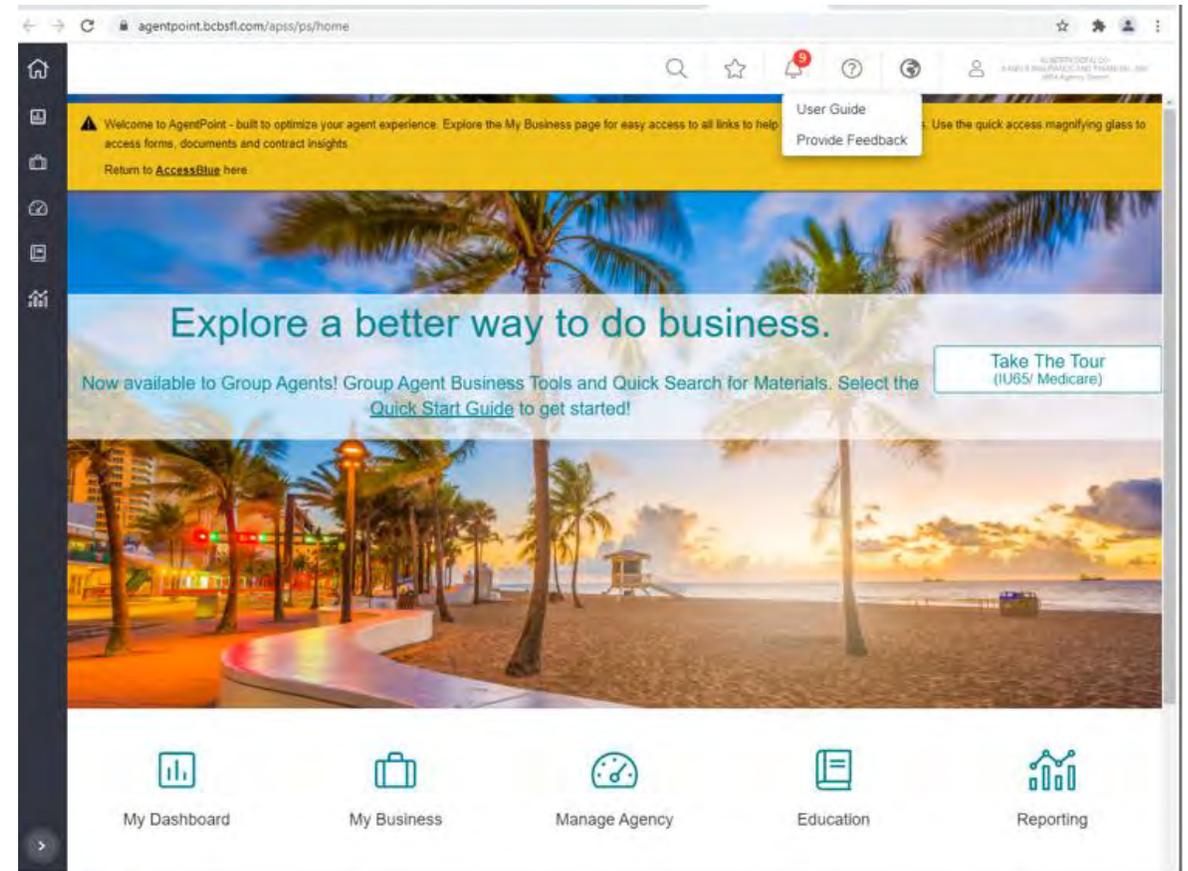
Florida Blue

Florida Blue Medicare, Inc.

Additional Resources

To access a complete User Guide of AgentPoint, from the landing page, click on the (?) tab on the top right of the screen and select User Guide. This will direct the user to the AgentPoint External User Guide

If you have technical difficulties or have questions regarding registration, the application process, onboarding status, setting up the EFT account, etc., please contact our Agent Service Center (ASC) at 1-800-267-3156 or your local Broker Manager.



REGIONAL MAP



NORTH REGION

Ivan Cajic
 Ivan.Cajic@bcbsfl.com
 c: 904-742-0651

EAST CENTRAL REGION

Heidi Sierra
 Heidi.Sierra@bcbsfl.com
 c: 407-201-1788

TAMPA BAY

Quawn Green
 Quawn.Green@bcbsfl.com
 c: 813-455-5953

CENTRAL REGION

Lance Sweat
 Lance.Sweat@bcbsfl.com
 c: 813-244-6491

SOUTH-WEST REGION

Darla Siener
 Darla.Siener@bcbsfl.com
 c: 562-818-8049

SOUTH REGION

Fadner Theodore
 Fadner.Theodore@bcbsfl.com
 c: 305-968-3437

MIAMI-DADE/COLLIER

Alexandra Nguyen
 Alexandra.Nguyen@bcbsfl.com
 c: 305-978-7799

Thank You!

Florida Blue 
Your local Blue Cross Blue Shield

MEDICARE