

Setting up Direct Deposit

Purpose

- To add or update an Electronic Funds Transfer (EFT) -FMO Agent
- Agent Point External Access Agent Point External is located through the Florida Blue website for Agency Owners and designated delegates/agents and performs best on Google Chrome Browser. Access Agent Point external via the following link

Important Reminders

1. Agency Owners that also sell as an Agent need to setup direct deposit under both roles in Agent Point.

This can be done by switching the user profile preferences



- o Agents can enroll directly in Direct Deposit
- o Only Agency Owners can set up direct deposit at the agency level.
- o Banking Information shared is at the discretion of the submitted. The account information can be the same for an agent payee as the actual agency.
- Agent commission details are also visible through the Agency Owner/Delegate III access using the Agency's Compensation icon > Dashboard icon > Team Hierarchy

2. Possible Error message to appear when setup direct deposit:

 A system error has occurred which is being resolved at this time. Please return after 24 hours or next business day to submit your Direct Deposit Request. We apologize for the inconvenience this may have caused.

o Solution: Agent needs to contact the Agent Service Center (1-800-267-3156, option 3) for support. If the ASC is unable to resolve the issue, they will create an internal IT Smart Ticket.

4. For uncashed checks, a stop and reissue request is submitted at the end of each week. Process takes 4-7 business day turnaround for ACH once instructed by payee. Add additional 3-5 days for reissuing as paper check.

o Example, On Monday (day1), payee agrees to reissue check by ACH. Sales Compensation team must be notified by Thursday (day 4) for internal request on Friday (day 5). Payment is stopped and resent by Direct Deposit on Monday (day 6) for Tuesday (day 7) arrival.



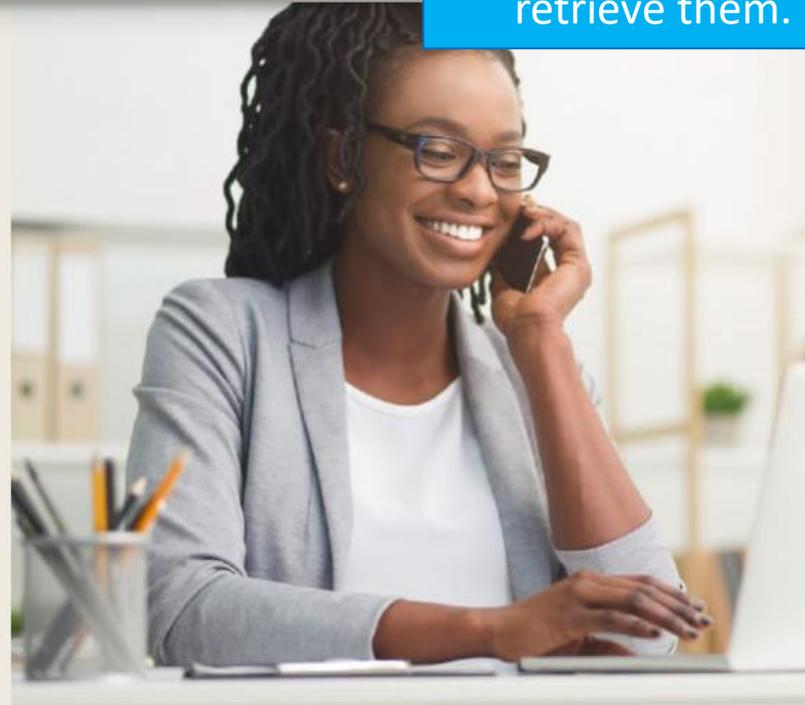
1. Go to: <https://www.floridablue.com/agents>
2. Log in with your credentials or click on Forgot Username or Password to retrieve them.

Florida Blue Agent Login

Log in to Agent Point

Log In

[Forgot Username or Password?](#)



[Create an Agent Point login account >](#)

Are you a new Florida Blue broker? Create an agent portal account and start to grow your business with us.



[Agent Tools & Resources >](#)

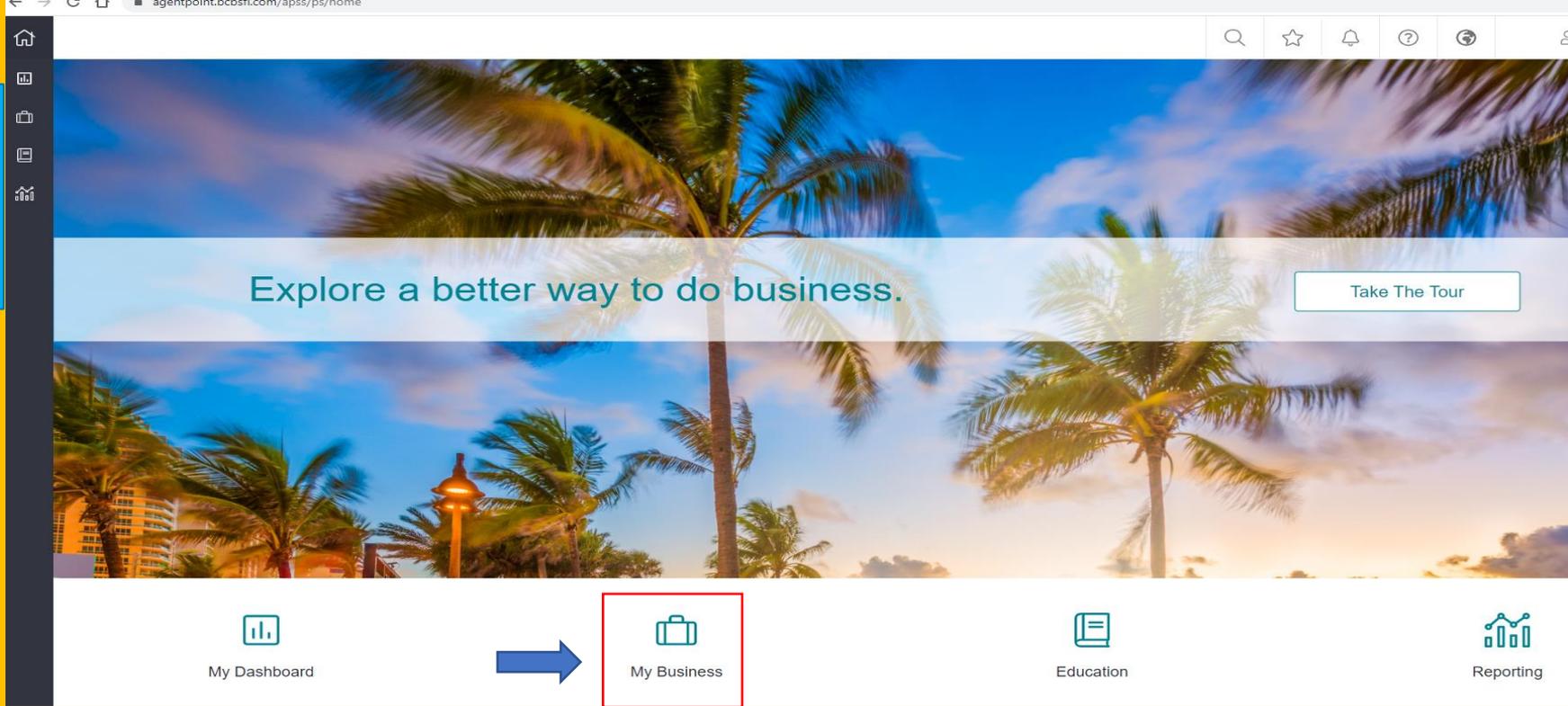
Access the tools you and your clients need to successfully enroll and manage their healthcare plans.



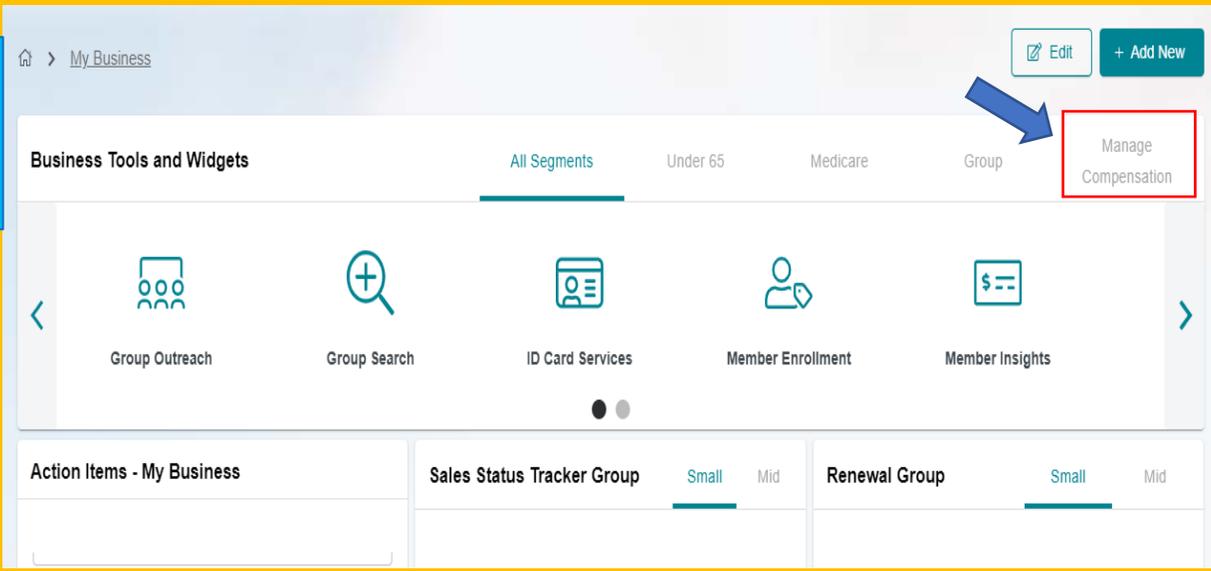
[Value-Based Healthcare >](#)

Find out how we're curbing the rising cost of health care while focusing on wellness, early intervention and intense chronic condition management.

3. Once logged in,
Click on -
My Business



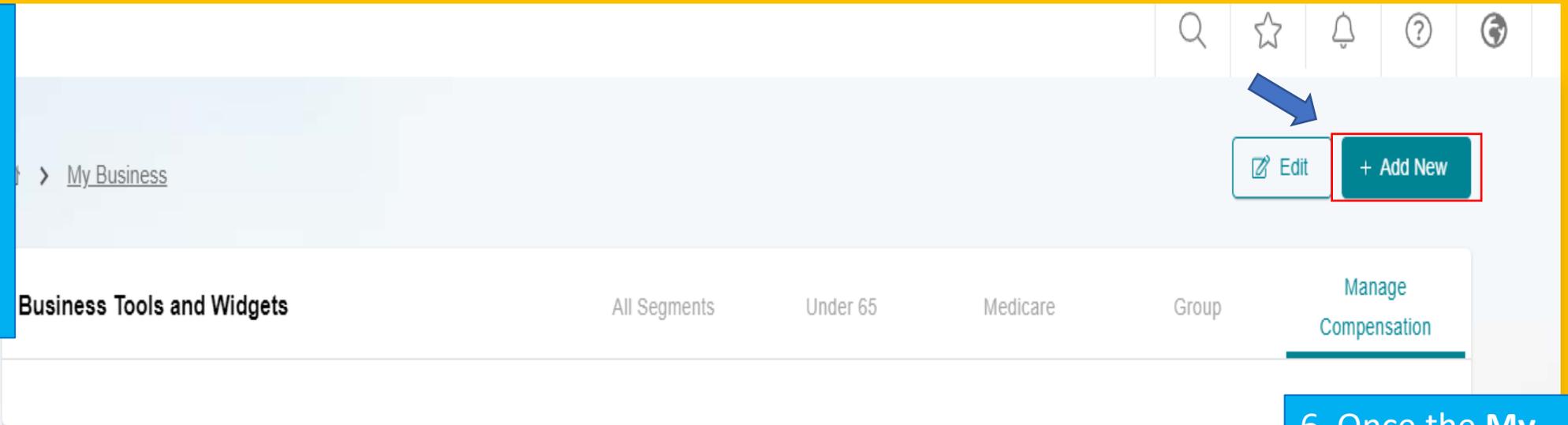
4. Go to:
Manage Compensation



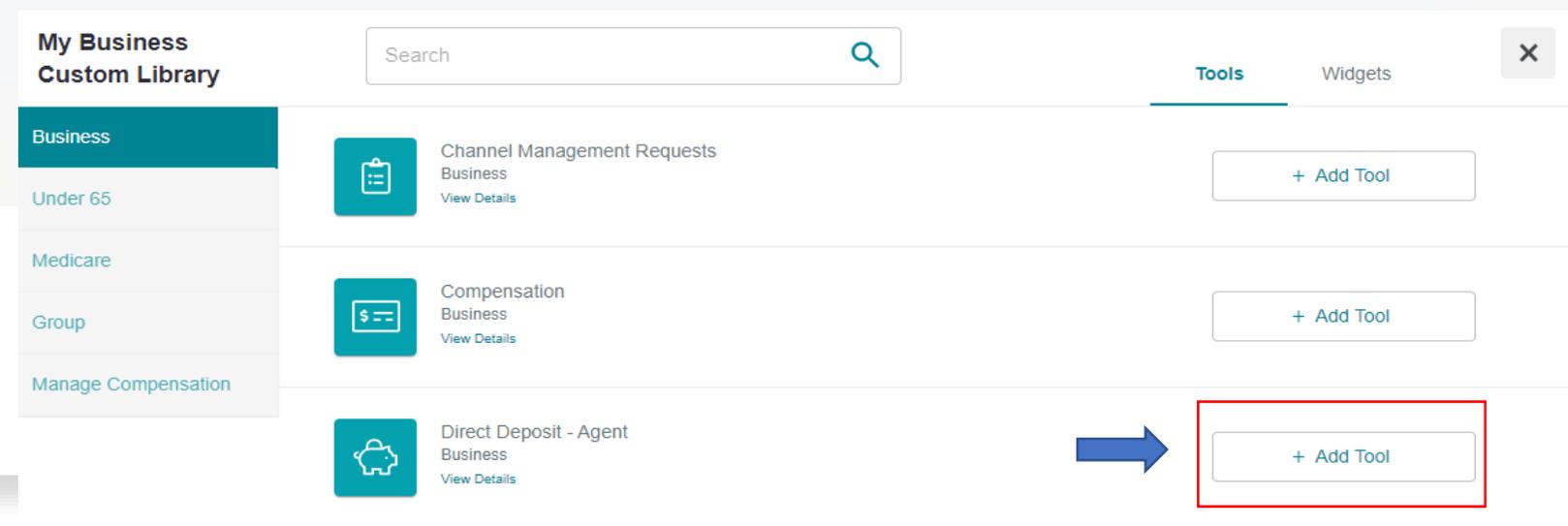
5. If you receive this message, be sure to click on :

- **Add New**

This will allow you to add a new tool to your library .



You have no widgets selected to view on your My Business. Select "+ Add New" and go to your Custom library to add content.



6. Once the My Business Custom Library comes up, find the Piggy icon (Direct Deposit) and click Add Tool. This step will allow you to see the Direct Deposit tool on your Manage Compensation Menu moving forward.

7. Select **“Update Bank Account”** and enter the necessary fields, agree to the Attestation and select: **Submit**

JOHN DOE

Agent Name: JOHN DOE

AOR Number: K000-000

Email john.doe@yahoo.com

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, **JOHN DOE** 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: 03/17/2022



Cancel

Submit

Direct Deposit

Electronic Funds Transfer

Confirmation

AOR Number: 0000

Account Number: 000000000000

Routing Number: 000000000

Company Name: [REDACTED]

Account Holder Name: [REDACTED]

Submitted By: FIRST NAME LAST NAME

Submitted Date: 00/00/00

Submitted Time: 00:00AM

CLOSE

8. Upon successful submission, you will be directed to a Summary Page which summarizes all data submitted with a record of when the data was submitted. You will also receive a confirmation email.

Please notice that if you don't set up Direct Deposit, we will mail you a check to the address on file.

Questions ?

Contact one of our experienced local Broker Managers

Or email us at: fbmbrokers@bcbsfl.com

Regional Map

