

# MANAGE MY BOOK & MEDICARE AOR CHANGES

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**BlueCross BlueShield  
of North Carolina**

## Who can you make a plan change for?

- + You can help any Blue Cross NC Over 65 member who contacts you
- + The member could be one of your own clients, the client of another agent, or a direct member.
- + When you successfully help them make a plan change you will remain their agent of record, or you will become the agent of record if the member is currently with another agent or is a direct member.
- + Remember you must have the Medicare Advantage appointment to assist an existing member who wants to change to another Medicare Advantage plan or assist a Med Supp and/or Part D member who wants to enroll in a Medicare Advantage plan.
- + If you have any questions please reach out to your RSE.

## Manage My Book is the preferred option when making a plan change for a member

- + This will work for your existing clients as well as for clients who you are not currently the AOR for.
- + You must have their Member ID # which will start with either a J or W.
- + Medicare Advantage or Part D members requesting a plan change must do so during a valid Election Period. This could be AEP, MA OEP, or SEP
- + Existing Medicare Supplement members have two opportunities each year to make a plan change. Changes can be made May 1<sup>st</sup> – May 31<sup>st</sup> for a June 1<sup>st</sup> effective date or October 15<sup>th</sup> – December 31<sup>st</sup> for a January 1<sup>st</sup> effective date.
- + You must have a completed paper application to document all plan changes. You will need information from the application to complete the change and this provides proof that the member requested the change.
- + This tool cannot process changes to BBRx Part D plans.

# FROM THE PRODUCER HOME PAGE



## Select Manage My Book

The screenshot shows the Blue Cross BlueShield of North Carolina Producer Home Page. The page layout includes a top navigation bar with the company logo and a search bar. On the left, there is a sidebar menu under 'Agent Home' with options like 'Products & Rate Tables', 'Forms & Applications', 'Job Aids', 'Training, Policies & Guides', 'Advertising Materials', and 'News'. The main content area is divided into several sections:

- To Do:** A list of tasks including 'Applications needing your attention', 'Check Application Status', 'Check Quote Status', and 'Manage My Book' (circled in red). There is also a 'Reports' link.
- Health Rate Quote:** A section with a 'Rate Quote' button.
- Ancillary Products:** A section with a 'Vision/Dental Rate Quote' button.
- News:** A section with several news items, including 'Social Media Toolkit for Agents', 'Attend the Next Speaker Series on February 19', 'Introducing a New Medicare Plan Finder Tool', 'New Drugs Recently Added to Our Utilization Management Program - January 2020', and 'Refreshed Today We Video Begins Airing on Monday, February 3'.
- Quick Links:** A list of links such as 'Health Sherpa Under 65 Applications', 'Applications', 'Order Supplies', 'Access Delinquency Reports', 'Under 65 Training, Policies & Guides', '2020 Individual Health Combo Brochure [pdf]', '2019 Individual Health Combo Brochure [pdf]', 'Under 65 Agent Tip Sheet [pdf]', 'Senior Market Agent Tip Sheet [pdf]', 'Agency Rewards Program', 'Individual Product Grid [pdf] - 2019 | 2020', '2020 Under 65 Individual Formulary Information [pdf]', '2019 Under 65 Individual Formulary Information [pdf]', and 'Blue Cross NC Formulary [pdf]'. There is also a link for 'Looking for group plans? Switch to Group Agent View'.

# SEARCH BY CUSTOMER



You can Search By Name or Member ID to pull up a member you are the AOR for.

The screenshot shows a web browser window displaying the 'Manage My Book' search interface. The browser address bar shows the URL: `bcbsnc.com/assets/producer/secure/apps/producer-services-api/#/managemybook`. The page title is 'Manage My Book'. On the left, a dark blue sidebar contains the user's name 'KEVIN SLATER' and a list of navigation items: 'Action Needed', 'Sales To Close', 'Submitted Applications', 'Archived', 'Manage My Book' (highlighted), '834 Enrollments', 'Change App', and 'Reports'. The main content area features a search form with the following fields: 'Producer Number' (with value 'P0043407'), 'First Name', 'Member Id', 'By Segment' (with value 'My Book Of Business'), 'Last Name', 'Rate Increase', and 'County'. A 'Book Of Business' icon is visible below the search form. A blue 'SEARCH' button is located at the bottom right of the search form. At the bottom of the page, there is a footer with links: 'ABOUT BLUE CROSS NC', 'CONTACT US', 'MEDIA CENTER', 'CAREERS', 'PRIVACY AND USAGE', and 'HELP!'. Below the footer, a small copyright notice reads: '©2020. Blue Cross and Blue Shield of North Carolina is an independent licensee of the Blue Cross and Blue Shield Association.'

# SEARCH BY SEGMENT



To search for a member you are not the AOR for select Medicare AOR Changes in the By Segment field.

The screenshot shows the 'Manage My Book' search interface. The search dropdown menu is open, displaying the following segments:

- My Under 65 Customers
- My Over 65 Customers
- All Dental Plans
- All Vision Plans
- Medicare AOR Changes** (highlighted with a red circle)
- Delinquent Customers

The search form includes the following fields:

- Producer Number: P0043407
- First Name
- Last Name
- Member Id
- Rate Increase
- County
- SEARCH button

# MEMBER ID NEEDED



When doing a Medicare AOR change, you must enter the Member ID in Search By Customer, then select Search

The screenshot shows the 'Manage My Book' interface. On the left is a dark blue sidebar with the 'NC Producer' header and a list of navigation items: KEVIN SLATER, Action Needed, Sales To Close, Submitted Applications, Archived, Manage My Book (highlighted), 834 Enrollments, Change App, and Reports. The main content area is titled 'Manage My Book' and features a search section with a magnifying glass icon and the word 'Search'. Below this are several input fields: 'Producer Number' (P0043407), 'First Name', 'Last Name', 'By Segment' (Medicare AOR Changes), 'Rate Increase', and 'County'. The 'Member ID' field is circled in red and contains the value 'J1234567801' and a red error message: 'Please Enter Member ID for Medicare Member'. A red arrow points to the 'SEARCH' button at the bottom right of the search section. At the bottom of the page, there is a footer with links for 'ABOUT BLUE CROSS NC', 'CONTACT US', 'MEDIA CENTER', 'CAREERS', 'PRIVACY AND USAGE', and 'HELP!'. Below the footer is a copyright notice: '©2020. Blue Cross and Blue Shield of North Carolina is an independent licensee of the Blue Cross and Blue Shield Association.'

# MEMBER DISPLAYED



## Member record displayed, need to View More Plans

The screenshot shows a web browser window with the URL `bcbsnc.com/assets/producer/secure/apps/producer-services-api/#/managemybook`. The page title is "Manage My Book". On the left is a dark blue sidebar with the "NC Producer" logo and a list of navigation items: "KEVIN SLATER", "Action Needed", "Sales To Close", "Submitted Applications", "Archived", "Manage My Book" (highlighted), "834 Enrollments", "Change App", and "Reports".

The main content area has a search bar at the top with a magnifying glass icon. Below it are search filters: "Producer Number" (P0043407), "First Name", "Member ID" (J123 [redacted]), "By Segment" (Medicare AOR Changes), "Last Name", "Rate Increase", and "County". A "SEARCH" button is at the bottom right of the search area.

Below the search area is a "List of Clients" section. It includes a "Sort By" dropdown set to "Name" and a "Filter" search box. A search result is displayed for "Twine [redacted]". Below the name is a card for "Blue Medicare Essential Plus (H3449-023-005)" with a "VIEW MORE PLANS" button circled in red. The card also shows a phone number "(252) [redacted]".

To the right of the client list is a detailed view for "Twine [redacted] Active". It includes contact information: "721 Sand [redacted]", "(252) [redacted]", and "10/ [redacted]". A "GET MEMBER ID CARD" button is present. Below this is an "Active Policy - J1233816101" card for "Blue Medicare Essential Plus (H3449-023-005)". The card shows "By Coverage: Enhanced", "Out of Network Not Covered", "Primary/Specialist \$0/\$50", and "MONTHLY COST \$12<sup>EO</sup>". A "PAID" status is shown with a green checkmark. A "VIEW MORE PLANS" button is circled in red at the bottom left of the policy card.

At the bottom of the page, there is a footer with links: "ABOUT BLUE CROSS NC", "CONTACT US", "MEDIA CENTER", "CAREERS", "PRIVACY AND USAGE", and "HELP!". Below the footer is a copyright notice: "©2020 Blue Cross and Blue Shield of North Carolina is an independent licensee of the Blue Cross and Blue Shield Association."



# PLAN OPTIONS



Available plan options shown. Will need to expand to show hidden plans.

The screenshot displays the Blue Cross NC Producer Dashboard. The left sidebar shows the user profile for Kevin Slater and various navigation options. The main content area is titled 'Book Of Business' and features a 'List of Clients' section with a search filter and a list of clients. One client, Twine, is highlighted, showing their active policy: Blue Medicare Essential Plus (H3449-023-005) with a monthly cost of \$12.00. Below this, a section titled 'Medicare Supplement Plans' is highlighted with a red box. This section includes a table of plan options with their respective monthly costs:

Plan	Monthly Cost
Plan A	197.25
Plan G	245.00
HD Plan G	47.00
Plan K	127.75
Plan N	232.50

Below the table, there are dropdown menus for 'HMO', 'Prescription Drug Plan', and 'PPO'. The footer contains contact information and a copyright notice for 2020.

# SELECT NEW PLAN



For Medicare Supplement click on the plan name, for MA or Part D click Enroll

The screenshot shows the 'Producer Dashboard' for Kevin Slater. The main content area is divided into several sections:

- Medicare Supplement Plans**: A section titled '2019 Book (Old MS Book to New MS Book Requires Underwriting)' containing buttons for Plan A (197<sup>25</sup>), Plan G (245<sup>00</sup>), HD Plan G (47<sup>00</sup>), Plan K (127<sup>75</sup>), and Plan N (232<sup>00</sup>). 'Plan G' is circled in red.
- HMO**: A section with three plan cards:
  - Essential (H3449-025)**: Monthly Cost 0<sup>00</sup>, Rx Coverage Enhanced, Out of Network Not Covered, Primary/Specialist \$10/\$50. ENROLL button.
  - Medical Only (H3449-012)**: Monthly Cost 0<sup>00</sup>, Rx Coverage None, Out of Network Not Covered, Primary/Specialist \$20/\$40. ENROLL button.
  - Enhanced (H3449-024-003)**: Monthly Cost 75<sup>00</sup>, Rx Coverage Enhanced, Out of Network Not Covered, Primary/Specialist \$0/\$40. ENROLL button is circled in red.
- Prescription Drug Plan**: A section with two plan cards:
  - RX Standard (S5540-002)**: Monthly Cost 89<sup>50</sup>, Rx Coverage Standard, Out of Network N/A, Primary/Specialist N/A. ENROLL button.
  - RX Enhanced (S5540-004)**: Monthly Cost 121<sup>40</sup>, Rx Coverage Standard, Out of Network N/A, Primary/Specialist N/A. ENROLL button.
- PPO**: A section with one plan card:
  - PPO Enhanced (H3404-003-002)**: Monthly Cost 69<sup>00</sup>, Rx Coverage Enhanced, Out of Network Generally 40%, Primary/Specialist \$10/\$50 In-network. ENROLL button.

# NEW WINDOW OPENS



Fill out required fields, select Continue, and it will guide you through the change process. Remember there must be a valid Election Period to change from or to a Medicare Advantage or Part D plan.

Individual Agents | Blue Cross NC x | Producer Dashboard x | Buy Online - Before You Begin x +

bcbssc.com/sapps/buyonline/application/OnlineApplication.action

Apps | BCBSNC | The Zone | SBL-App01 FINS PR... | Welcome to Concl... | Senior Market: Vie... | Senior Market: Wor... | Document Title | HealthEquity Login | Workbooks - Tables... | MedicareGroup - H... | ScoreCard Dashboa... | Individual Members... | Sales Performance...

Text Size + -

**BlueCross BlueShield of North Carolina**  
Medicare plans to fit your needs

Need help? Call 1-800-478-0583  
8 a.m. - 8 p.m., 7 days a week.

KEVIN SLATER | [Dashboard](#)

You're Applying For  
**Blue Medicare Supplement<sup>SM</sup> Plan G**  
Monthly Premium: \$ 245.00  
Prescription Drug Coverage:None  
[Outline of Coverage \(PDF\)](#)

Don't forget to apply for a drug plan when you are done

## Before You Begin

All information is required, unless otherwise noted.

### Eligibility

Are you a North Carolina resident?

Yes  No

Effective Date:  
Below are the available effective dates for the plan you selected.

date, close this window and select a new effective date through Rate Quote.

02/15/2020  
03/01/2020  
03/15/2020  
04/01/2020  
04/15/2020  
05/01/2020  
05/15/2020

### Customer Information

Medicare supplement policy. If you purchase this policy, you may want to evaluate your existing need multiple coverages.

er Medicaid and may not need a Medicare supplement policy.

When purchasing this policy, you become eligible for Medicaid, the benefits and premiums under your Medicare supplement policy will be suspended during your entitlement to benefits under Medicaid for 24 months. You must request this suspension within 90 days of becoming eligible for Medicaid. If you are no longer entitled to Medicaid, your suspended Medicare supplement policy (or, if that is no longer available, a substantially equivalent policy) will be reinstated if requested within 90 days of losing Medicaid.

**Continue**