



# BROKER DASHBOARD

---

*Commercial Individual (CI) Sales*

APRIL 1, 2019

**Proprietary and Confidential**

# AGENDA

---

- I. Overview
- II. Broker Portal Access
- III. Dashboard

# OVERVIEW

---

*Commercial Individual Broker Dashboard*

# Overview

---

The Commercial Individual (CI) Broker Dashboard is a self-service tool on the Broker Portal (<https://broker.carefirst.com/brokers/home.page>) that allows CareFirst BlueCross BlueShield (CareFirst) General Agency Staff the ability to access information for their books of business. The Dashboard supports increased internal and external productivity by providing high level and detailed information on:

- Current and historical subscriber data
- Eligibility, enrollment and billing information
- Demographic information of the subscribers including email addresses
- Enrollment, payment and termination statuses
- Reports – can be generated and exported as a .xls or PDF format. The Active Subscriber Report will identify reinstatements. The Premium Paid report will identify the number of covered members and the creation of a new book of business report will have active and terminations all in one report.

Agents can access the Dashboard on their PCs, tablets and smart phones. And, the system refreshes on a weekly basis. Compatible web browsers are: Internet Explorer (IE) 11 or newer, Google Chrome and Mozilla Firefox.

# BROKER PORTAL ACCESS

---

*Commercial Individual Broker Dashboard*

# Access the Broker Portal

- Go to <https://member.carefirst.com>.
- Click the For Brokers tab (use IE11 or newer, Google Chrome or Mozilla Firefox).
- Click the Log In button.
- Enter the User ID and Password provided to you.

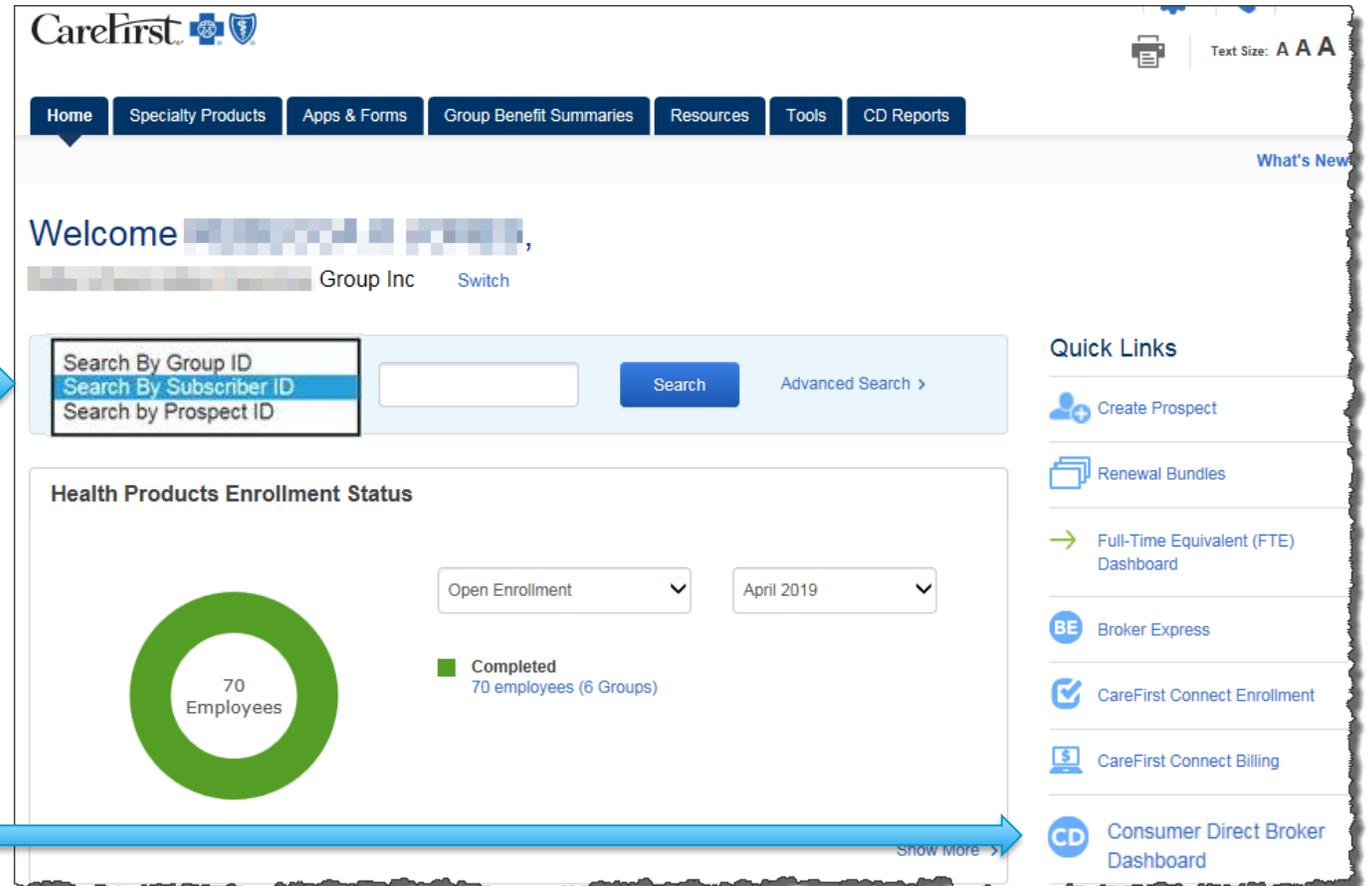
The Broker Portal homepage will open (see next slide).



# Broker Portal Homepage

From the Broker Portal homepage, users should focus on these 4 areas :

1. Perform a quick subscriber search by selecting **Search by Subscriber ID** and entering the subscriber's SID.
2. Click on the Broker Dashboard in the Quick Links right column to open the Dashboard (see slides 10-11 for details)



The screenshot shows the CareFirst Broker Portal homepage. At the top, there is a navigation menu with links: Home, Specialty Products, Apps & Forms, Group Benefit Summaries, Resources, Tools, and CD Reports. Below the navigation is a welcome message: "Welcome [redacted], [redacted] Group Inc [Switch]". A search bar is located below the welcome message, with a dropdown menu showing "Search By Group ID", "Search By Subscriber ID" (highlighted with a blue arrow), and "Search by Prospect ID". To the right of the search bar is a "Search" button and an "Advanced Search" link. Below the search bar is a "Health Products Enrollment Status" section. It features a donut chart showing "70 Employees" and a legend for "Completed" (70 employees (6 Groups)). There are two dropdown menus: "Open Enrollment" and "April 2019". To the right of the enrollment status is a "Quick Links" column with several items: "Create Prospect", "Renewal Bundles", "Full-Time Equivalent (FTE) Dashboard", "Broker Express", "CareFirst Connect Enrollment", "CareFirst Connect Billing", and "Consumer Direct Broker Dashboard" (highlighted with a blue arrow). A "Show More" link is at the bottom of the Quick Links column.

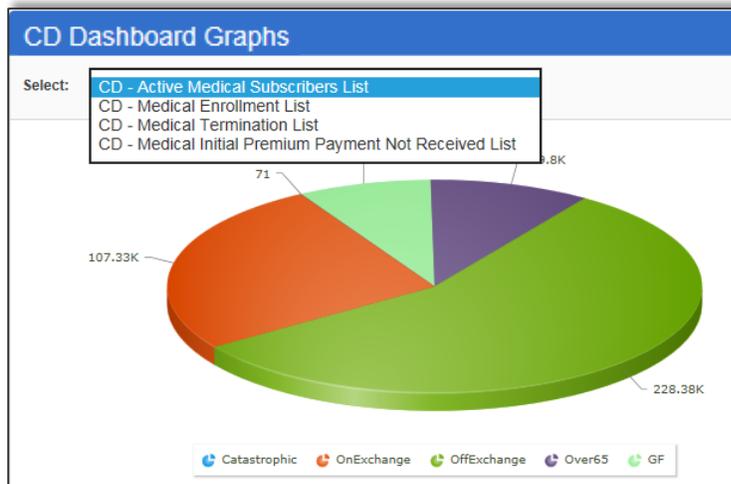
(continued)



3. Click on the CD Reports tab to open up to 7 available reports & a brief description.
4. Scroll to the bottom of the page to see the CD Dashboard Graphs. Users can select the desired graph.

Name	Description
<a href="#">Active Subscriber Report</a>	View active subscribers
<a href="#">Terminations Report</a>	View termed subscribers
<a href="#">Initial Premium Payment (IPP) Never Paid Report</a>	View subscriber voids due to failure to pay IPP
<a href="#">Premium Paid Report</a>	View subscriber's premium payments
<a href="#">Initial Premium Payment (IPP) Outstanding</a>	View subscribers who have not paid their IPP
<a href="#">Arrears Report</a>	View subscribers who have failed to pay their monthly premiums
<a href="#">Book of Business Report</a>	View book of business

NOTE: These reports can be exported to a file.



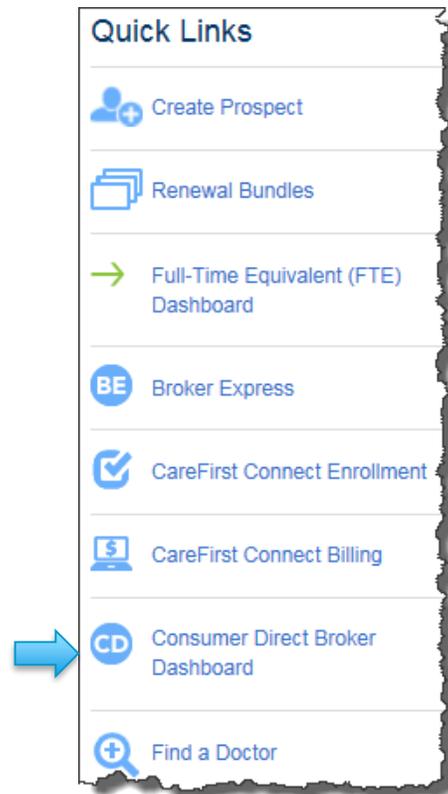
# DASHBOARD

---

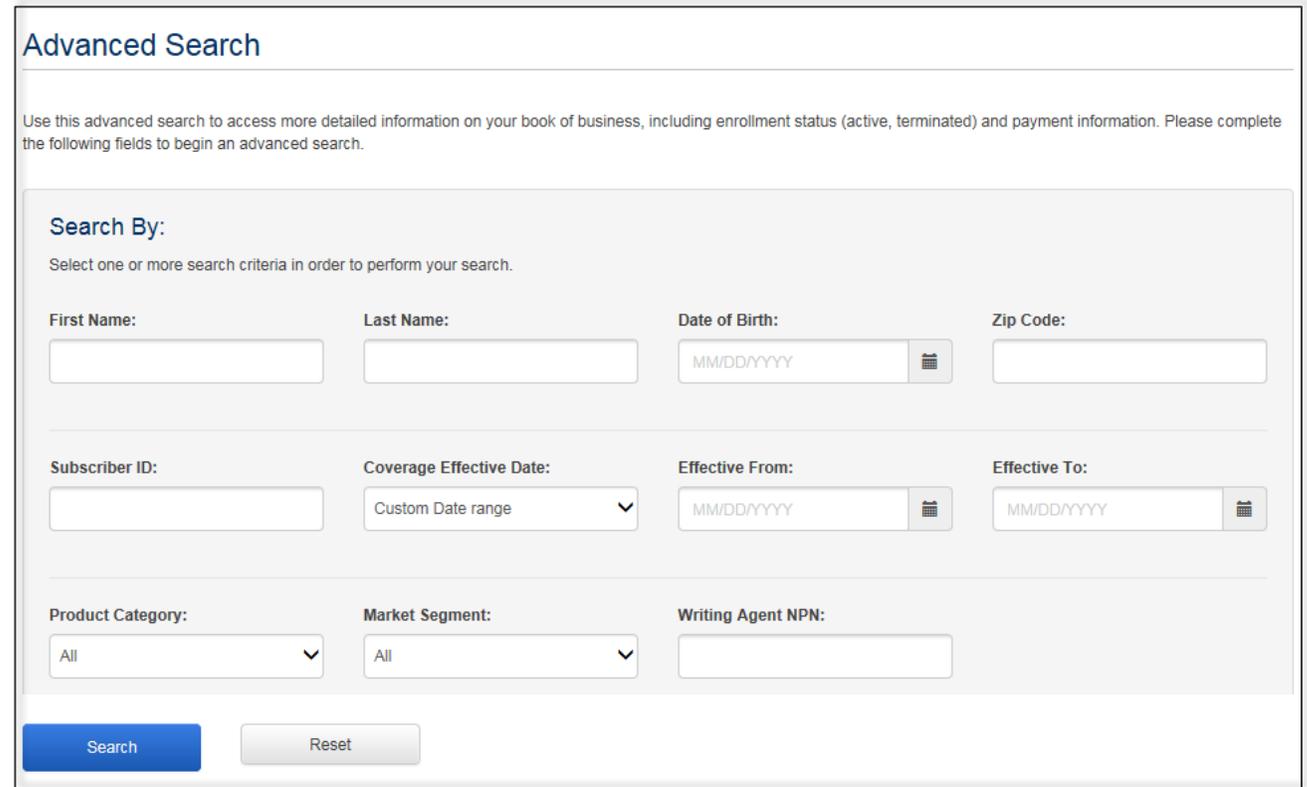
*Commercial Individual Broker Dashboard*

# Broker Dashboard – Advanced Search

- From the Broker Portal homepage, click the Consumer Direct Broker Dashboard link under the Quick Links.



- On the Advanced Search page, users can search for a client using a single field or multiple demographic points.



The screenshot shows the 'Advanced Search' page. It includes a title, a brief instruction, and several search criteria sections. At the bottom are 'Search' and 'Reset' buttons.

**Advanced Search**

Use this advanced search to access more detailed information on your book of business, including enrollment status (active, terminated) and payment information. Please complete the following fields to begin an advanced search.

**Search By:**  
Select one or more search criteria in order to perform your search.

**First Name:**  **Last Name:**  **Date of Birth:**   **Zip Code:**

**Subscriber ID:**  **Coverage Effective Date:**   **Effective From:**   **Effective To:**  

**Product Category:**   **Market Segment:**   **Writing Agent NPN:**

**Search** **Reset**

# Broker Dashboard – Search Results

- Search results will appear with links to additional information.

*Top of page*

Home / Subscriber Details

Mary 

Group Number:  K1

### Policy Information

Subscriber ID:	901 	Pre-fix:	
Group Number:	 K1	Termination Date:	12/31/2199
Market Segment:	Off-Exchange	Enrolled Date:	01/02/2015
Jurisdiction:	MD	Effective Date:	06/01/2019
Coverage:	Subscriber	Original Effective Date:	01/01/2015

[View Timeline](#) [View Broker Information](#) [Plan History](#)

### Billing Information

Premium Amount Paid on 02/14/2019	( <b>\$735.48</b> )
<i>Full Payment</i>	
Monthly Premium	\$735.48
Total Subsidy Amount	(\$0.00)
Total Subscriber Liability due for Mar, 2019	<b>\$0.00</b>

*Bottom of page*

 Billing Frequency - Monthly [Billing History](#)

Signed up for Auto Payment

### Subscriber Information

 Mary  Subscriber  Terminated

### Family Members

 Not Applicable

### Broker Information

Broker Name:	 Associates	Tax ID:	
Writing Agent:	Timothy 	Effective Date:	01/01/2015
NPN:		Term Date:	12/31/2099

[Show More](#)

### Important Note

The information on this screen is protected health information and can only be accessed, used and disclosed in accordance with the HIPAA Privacy and Security Rules.

# First Time Portal Users and Password Resets

## Don't have a user account?

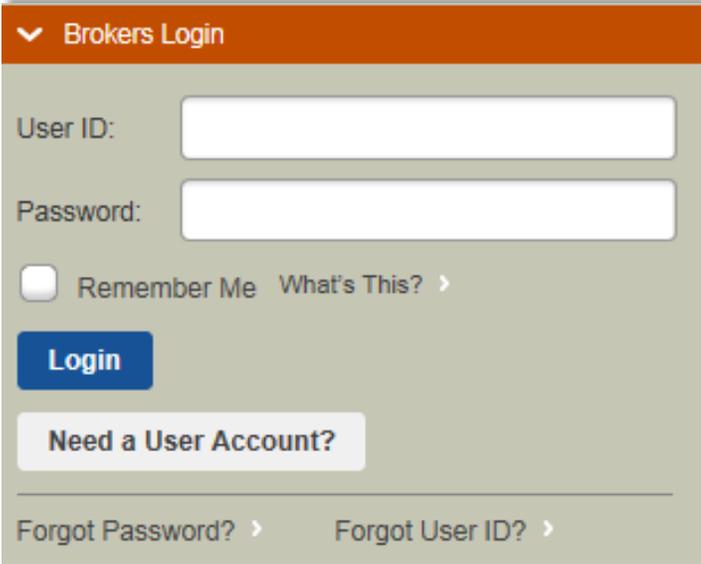
- Click the "Need a User Account?" button and you will be directed to instructions.

## Forgot Your User ID or Password?

- Click on the "Forgot Password?" and/or "Forgot User ID?"

## Locked Out of Your Account?

- Failure to login successfully after 3 attempts locks the account. Try to reset the password by clicking on the "Forgot Password?" button. This method won't work if the account is locked due to answering challenge questions incorrectly 3 times. If you continue to be locked out of the Dashboard, you will need to call the CareFirst Help Desk (410-998-6400 or 202-680-6400) to request a password reset.



The screenshot shows a web form titled "Brokers Login" with a dropdown arrow on the left. It contains the following elements: a "User ID:" label followed by a text input field; a "Password:" label followed by a text input field; a "Remember Me" checkbox with a "What's This?" link to its right; a blue "Login" button; a white button with a blue border labeled "Need a User Account?"; and at the bottom, two links: "Forgot Password?" and "Forgot User ID?", both with right-pointing arrows.



# THANK YOU

---

*For more information, contact*  
YOUR SR. BROKER REPRESENTATIVE

*This document was created for informational purposes only and is not intended to provide legal and/or accounting advice and should not be relied upon as such. Individuals and Producers should consult with their own accountants and/or legal counsel if they have any questions regarding the financial and legal impacts of the Affordable Care Act.*

*CareFirst BlueCross BlueShield is the shared business name of CareFirst of Maryland, Inc. and Group Hospitalization and Medical Services, Inc. CareFirst of Maryland, Inc., Group Hospitalization and Medical Services, Inc., CareFirst BlueChoice, Inc., The Dental Network and First Care, Inc. are independent licensees of the Blue Cross and Blue Shield Association. In the District of Columbia and Maryland, CareFirst MedPlus is the business name of First Care, Inc. In Virginia, CareFirst MedPlus is the business name of First Care, Inc. of Maryland (used in VA by: First Care, Inc.). ® Registered trademark of the Blue Cross and Blue Shield Association.*