



## **Digital Pre-enrollment materials tool**

### **Frequently Asked Questions**

#### **Background**

Blue Shield of California is making it easier for you to win and retain small business clients. Last year, we introduced digital delivery of open enrollment materials through customized microsites, making it easier to find, share, and review essential enrollment information. Now we're providing you direct access to this tool.

#### **What is changing?**

You will now have direct access to order Small Business Pre-enrollment materials as microsites or PDF kits. Order materials and have them emailed to you and/or your small business clients immediately.

- Select any of our medical plans, dental plans, and vision plans, and create a unique enrollment experience for each of your small business clients
- Kits include: Summary of Benefits (SOBs), Summary of Benefits and Coverage (SBCs), forms & applications, marketing flyers and more
- Microsite and/or PDF delivery available

#### **Who will use this?**

The Digital Pre-enrollment materials tool can be accessed by Brokers and General Agents to support small business clients.

#### **Why is this important?**

Giving you direct access to the tool, you will be able to:

- Easily access materials
- Create customized enrollment microsites and PDFs
- Email them to yourself/and or small business clients immediately

#### **When will this occur?**

This tool is now available to access via [Broker Connection](#) using your current login and password.

## **How and where can this be accessed?**

### **Steps:**

1. Access through Broker Connection on [www.blueshieldca.com](http://www.blueshieldca.com)
2. Select 'Resources' tab, then click on 'Order Materials'
3. Enter login credentials

**Note:** *For best experience, we recommend to use Chrome web browser.*

## **Is there training and additional resources available to help me get started?**

With any new digital tool, some learning is required. There are multiple ways to learn how to take advantage of the new tool.

- [Register for an online guided training](#)
- View the [Order Materials](#) resources page for additional information

## ***The following are answers to specific questions asked regarding the tool?***

### **Can I request 2019 materials using this tool?**

No. The Digital Pre-enrollment materials tool is only available for 2020 materials. If you need 2019 materials for your clients, please access [request materials](#) intake form and fill out required information. We will send materials via email within 24-48 hours.

### **Some of my small business clients may need a few hard copies of pre-enrollment kits, how do I request hard copies?**

Good news, by having direct access to this tool you can save the digital PDFs to your desktop and/or laptop and have them printed locally.

### **I'm in the tool creating my pre-enrollment materials and I need help remembering next steps, where do I get help?**

Click on the **help icon (?)** on the top right of the screen to access the training guide as a reference to view step-by-step guide on how to navigate around the tool.

### **Still have questions?**

For assistance with open enrollment materials, contact [smallbusinessmarketing@blueshieldca.com](mailto:smallbusinessmarketing@blueshieldca.com).

For other inquiries regarding your group's enrollment, contact your Blue Shield representative, or call Producer services at (800)559-5905.