Start guide:
How to create digital pre-enrollment materials

Small Business Pre-enrollment materials are now available to order as microsites or PDF kits. Through this tool, you can order materials and have them emailed to you and/or your small business clients immediately.

1. Access the tool through Broker Connection. Enter login credentials here.
2. Click on the ***Resources*** tab, then click on ***Order Materials***.

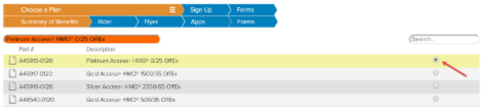
3. A page with information of the materials will show. Click on ***Digital Pre-enrollment materials tool*** to begin your order.
4. In the left corner, choose whether your materials are Off Exchange or Mirror.

5. Choose the language in which you want your materials created. If both languages are needed, the orders must be created separately.

   Note: Leave "Quantity field" empty, since no physical copies will be produced.

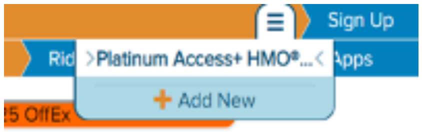
6. Type the company's name in the "**Book Name**" field.
7. Select the Benefit Type, Product Type, and Plan Family desired for your plan. This will generate a list of plans that have the features you selected.

8. Select the appropriate Summary of Benefits plan(s).



9. To add a new plan, click on ***Add New*** to the ***Choose a Plan*** row.

   Note: You can only select one plan at a time.



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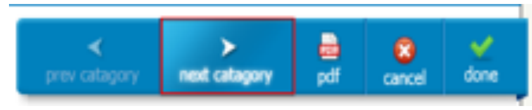
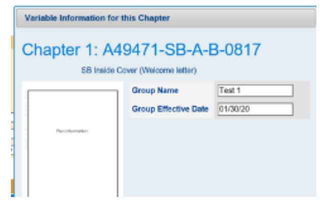
10. Click on ***next category*** to include other information about the plan such as Rider, Flyer, and Applications and Forms associated with the plans selected.



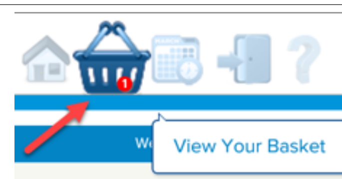
11. When you have selected all the documents and plans you want to include, click ***done*** in the upper right corner.

12. A window that says "**Variable Information for this Chapter**" will pop up. Type the company's name in the "**Group Name**" field, and enter the effective group date in the "**Group Effective Date**" field.



13. Click on ***Save***.

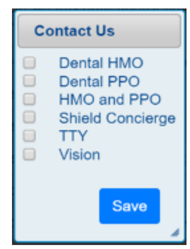
14. This will take you back to the home page, where you will see your order. Proceed to click on the basket icon in the upper right corner.



15. The microsite window display is now visible. Fill out the required information. When adding the recipient emails, note that you can import lists from Excel. The "**Expiration date**" field may be left empty. **Note**: For Spanish microsites, change the microsite template to "Pre-Enrollment (Spanish)."

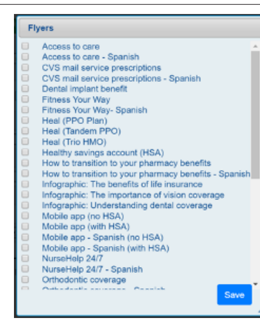
16. Select the appropriate "**Contact Us**" plan(s) needed for your group.

Note: Select "**Shield Concierge**" if the group offers a Trio HMO plan.



17. Select the marketing flyers applicable to your group.

Note: For Spanish flyers, the naming convention will indicate "**Spanish**" in the extension name.



18. On the bottom of the page, you will see a preview of the microsite. If everything appears correct, click on ***Create new microsite*** at the bottom of the page. To make edits to the microsite, click on ***Continue shopping***.

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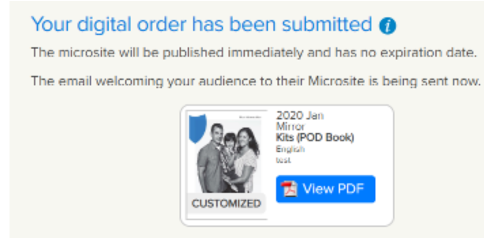
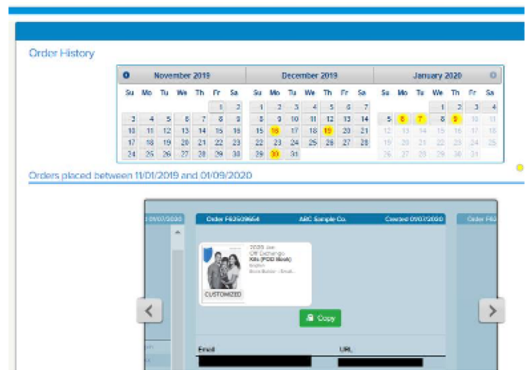
19. You will be prompted to a page that shows the URL to your microsite. You will also have the option to download a PDF of your materials.



20. You will receive an email from BSCA Plan <**noreply@bscabook.com**> with the link to your microsite.

21. To view Your Order History, click on the calendar icon in the upper right corner.



22. **Note:** Click on **?** (the help icon) in the top corner of your screen to access the training guide.

Additional resources are available here:

[View a sample site]

[Broker Connection]

Contact us:

For assistance with open enrollment materials, contact smallbusinessmarketing@blueshieldca.com.

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

blue california