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Blue Agent Site for Enrollment Status (BASES) Guide



Blue Agent Site for Enrollment Status (BASES)

Blue Agent Site for Enrollment Status (BASES) is a tool that allows agents to track their enrollment in a variety of individual products.

The BASES website displays selected information about:

- Blue OptionSM members for BlueChoice HealthPlan of South Carolina.
- Blue EssentialsSM, Medicare Supplement and Medicare Advantage members for BlueCross BlueShield of South Carolina.

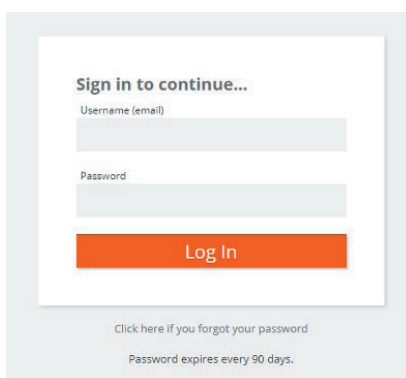
It is for use by agents and agencies appointed to sell BlueChoice[®] and BlueCross products. Each agent or agency can access only the records he or she has authorization to see, based on agent or agency ID.

How To Access Bases:

BlueChoice/BlueCross provides login credentials to agents and agencies.

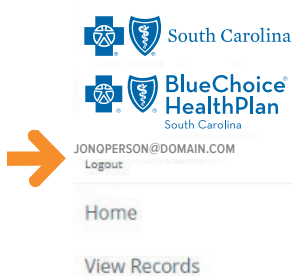
- Log in to BASES by visiting <https://client.5wstrategists.com/BASES/login>.
- Your email address is your account username.
- Blue@Bases1 is the password.
- When you first log in, you will get an email with a new multi-letter/symbol/number password.
- After you log in with this new password, you have the option to change your password by selecting your email address in the upper-left corner of the screen. The new password must contain at least one capital letter, one symbol and one number.

Quick tip: When typing or pasting an email username and password into the sign-in screen, make sure there is no space in front of either. A space will result in an error message.

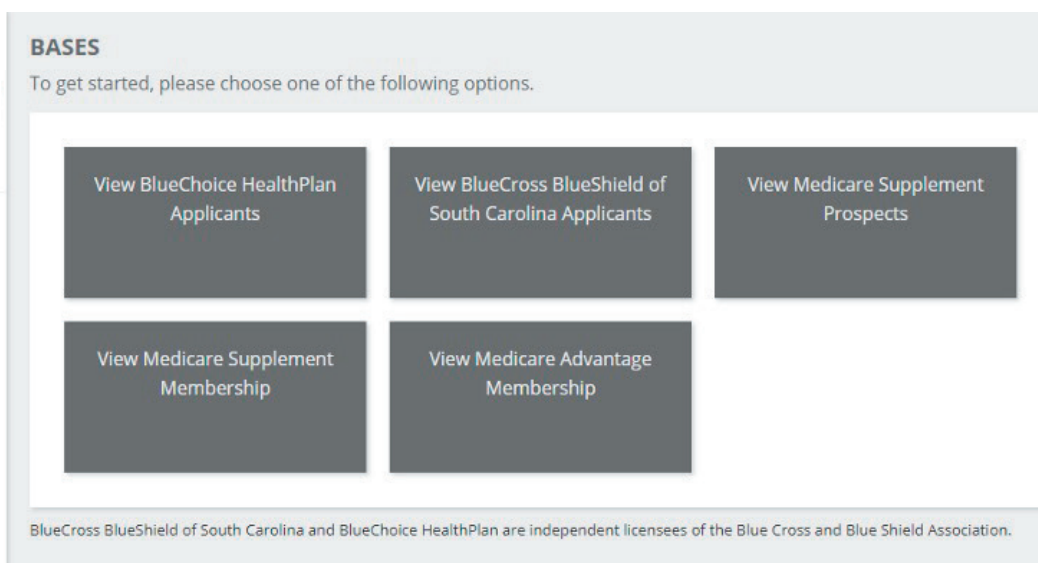


A login form titled "Sign in to continue...". It contains two input fields: "Username (email)" and "Password". Below the fields is an orange "Log In" button. At the bottom, there is a link "Click here if you forgot your password" and a note "Password expires every 90 days."

Select your email address and update your password.



A sidebar containing the Blue Cross of South Carolina logo, the BlueChoice HealthPlan South Carolina logo, the email address "JON@PERSON@DOMAIN.COM", a "Logout" link, and two menu items: "Home" and "View Records". An orange arrow points to the email address.



The BASES dashboard interface. At the top, it says "BASES" and "To get started, please choose one of the following options." Below this are five buttons: "View BlueChoice HealthPlan Applicants", "View BlueCross BlueShield of South Carolina Applicants", "View Medicare Supplement Prospects", "View Medicare Supplement Membership", and "View Medicare Advantage Membership". At the bottom, a disclaimer states: "BlueCross BlueShield of South Carolina and BlueChoice HealthPlan are independent licensees of the Blue Cross and Blue Shield Association."

Resetting a Password

Passwords in BASES expire every 90 days. On the sign-in page of the BASES tool, there is a reset password link that says, “Click here if you forgot your password”. Select that, enter your email address, and you will receive a new multi-letter/symbol/number password you can initially use and then update to something easier to remember.

Agent Access

Agents may select the “View BlueChoice Applicants” portal or the “View BlueCross BlueShield Applicants” portal to see ACA individual and family members. Agents who sell Medicare Supplements or Medicare Advantage can select those portals to see their current membership. Agents can only access records they are authorized to see, based on the products they are appointed to sell and their agent IDs.

Agency Access

An agency can have administration access and look at all sales made by its agents by entering its three-digit agency code. (If an agent code is ABC123, the agency code is the first three characters, ABC.) An administrator can only view sales under a primary agency code.

Sales Under a General Agent Code

If an agent sells under an agency code of a general agent he or she works with, the primary agency would not have access to those sales as an agency. Only general agents have this access, as it show all sales under their three-digit agency code.

Data Upload

Information in BASES comes from our membership systems for each product. Data in BASES is not in real time. Our BASES vendor receives membership data six times a week. This data uploads to the BASES system within 24 hours of that feed.

Timeliness of Data

When agents make a sale, they should allow a minimum of **five business days** for that sale to appear in BASES. A sale through the Federally Facilitated Marketplace (FFM) requires several days to process. Holidays during this period can increase the time for the new sale to populate to the sales report.

Data Missing in BASES

When data is not displaying in BASES, it is not a BASES issue. BASES will only display data on the membership report for each product. The delay in data populating to a report could be for a variety of issues. Contact your marketing representative or call the agent services phone number to determine why data is missing or delayed in showing in BASES.

Reading the Data

Along with having the account and contact information for your client, you can:

1. See if a policy for a new member is active or effectuated (if the member paid the first premium).
2. View the membership status for each member — the last two columns.


On the report, “Due Date of Bill” and “Account Paid to Date” show the payment status of member. If the date in the “Account Paid to Date” column is earlier than the due date of bill column, then the account is currently delinquent. If they are the same date or the “Account Paid to Date” is later than the due date, then the member is current.

Example:

The member on the third line is delinquent. They have paid up to December 1, 2020, but they are due for January 1, 2021.

If a member does not effectuate their new policy, or if they are delinquent for an existing policy, commissions only pay out once the account is brought current. Any due commissions pay out on the regular commission payment schedule.

ICHRA Indicator

 View In Excel								
Member Responsibility	Current Balance Due	Effectuation Status	Date Effectuated	Payment Method	Due Date of Bill	Account Paid to Date	Days Delinquent	2020 Enrollment Indicator
9.76	(\$279.76)	Effectuated	12/19/2019	Draft	1/1/2021	2/1/2021	0	A
10	\$0.00	Effectuated	12/6/2017	Check	1/1/2021	2/1/2021	0	A
1.86	\$83.17	Effectuated	9/10/2020	Check	1/1/2021	12/1/2020	42	A
6.18	\$0.00	Effectuated	1/4/2017	Credit Card	1/1/2021	2/1/2021	0	A
1.83	\$281.83	Effectuated	2/17/2016	Check	2/1/2021	2/1/2021	0	A
.83	\$0.00	Effectuated	12/11/2017	Draft	1/1/2021	2/1/2021	0	A
4.87	\$0.00	Effectuated	12/23/2019	Draft	1/1/2021	2/1/2021	0	A
10	\$0.00	Effectuated	12/30/2016	Check	1/1/2021	2/1/2021	0	A
10	\$0.00	Effectuated	2/9/2016	Check	1/1/2021	2/1/2021	0	A

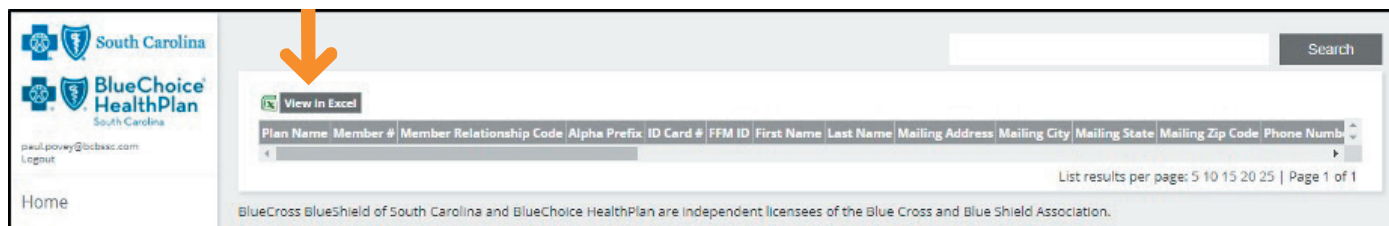
In the "View BlueCross BlueShield Applicants" portal, there is a column that shows the company for any member who has coverage through an Individual Coverage Health Reimbursement Arrangement (ICHRA) through his or her employer.

Medicare Supplement and Medicare Advantage Portal


Agents appointed to sell Medicare Supplement and/or Medicare Advantage products can access their membership in these portals. Like the ACA portals, these membership files update six times a week.

Saving Membership Files to Your Computer

Any membership report an agent has access to may be saved to the agent's computer in an Excel file.



South Carolina
BlueChoice HealthPlan
South Carolina
paul.povey@bcbscc.com
Logout
Home

 View In Excel

Plan Name	Member #	Member Relationship Code	Alpha Prefix	ID Card #	FFM ID	First Name	Last Name	Mailing Address	Mailing City	Mailing State	Mailing Zip Code	Phone Number
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List results per page: 5 10 15 20 25 | Page 1 of 1

BlueCross BlueShield of South Carolina and BlueChoice HealthPlan are independent licensees of the Blue Cross and Blue Shield Association.

Medicare Supplement Leads Portal

The BASES tool gives agents the opportunity to contact BlueChoice or BlueCross group members they have written in the past who are approaching eligibility, or are eligible, to purchase a Medicare Supplement plan.

On the first Monday of every month, a revised file posts in BASES, adding any 63-year-old members. Any active group member written by that agent who resides in South Carolina over the age of 63 will display in the BASES Medicare Supplement lead portal. The size of an agent's list will depend on whether the agent sold group coverage in the past.

If an agent does not have an appointment to sell Medicare Supplements for BlueCross, he or she can take the Learning Management System (LMS) training in My Business Manager at www.SouthCarolinaBlues.com.

Questions? We have answers.

Q. I've changed agent numbers; how do I see sales under my old and new agent number?

A. Contact your marketing representative at BlueChoice or BlueCross BlueShield to add your new agent code to your BASES profile. He or she will add your new agent number to your exiting profile.

Q. I sign in to BASES but see no data under any product. What's wrong?

A. While BASES could be temporarily down, this issue usually occurs when an agent tries to set up a new or additional profile in BASES with the same or a new agent number. This will cause both not to work. Contact your marketing representative for assistance.

Q. I get a Bad Credentials message when I try to sign in.

A. Remember, you must make sure there is no space in front of the username email or password. Your password is also case sensitive. You must have one capital letter, one symbol and one number.

Notes:

[illegible]

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of the Blue Cross Blue Shield Association.

www.BlueChoiceSC.com