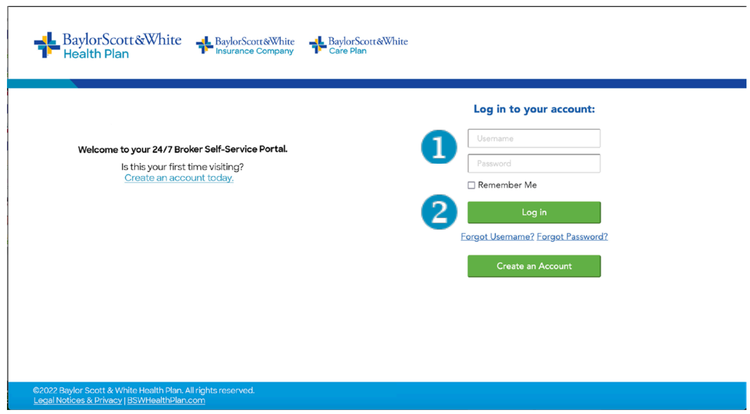
Accessing the Self-Service Agent Portal

Welcome to our tool for Agents and brokers: The Baylor Scott & White Self-Service Agent /Broker Portal.

Step 1

❶ Go to Broker.BSWHealth.com and enter your username and password.

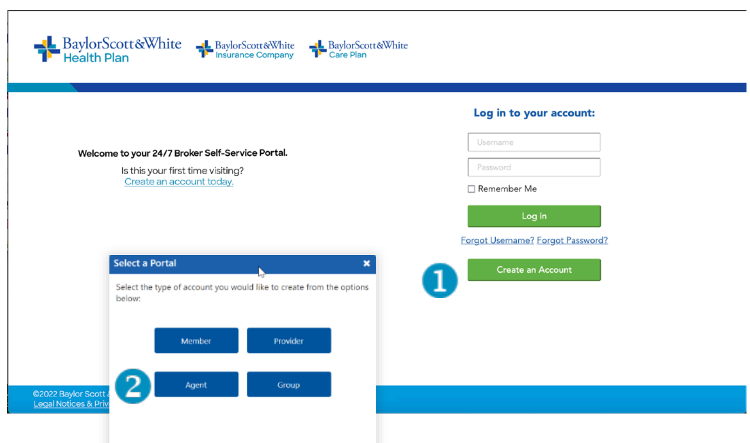
❷ Click **Log In** to proceed to **Step 2** (next page).



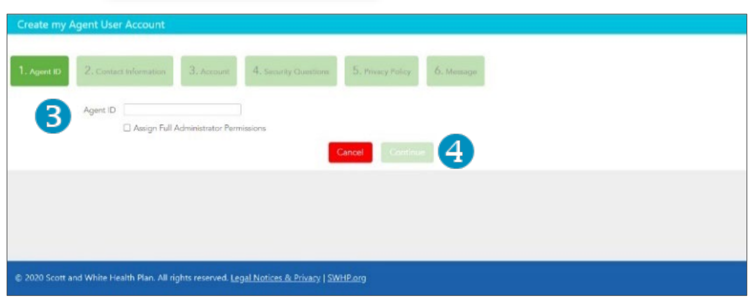
If you do not yet have a Baylor Scott & White Health Plan portal account:

❶ *Click the **Create an Account** button*

❷ *Then select "**Agent**" on the popup.*



❸ *Fill out the information in the fields on the following screens– starting with entering your **Agent ID.***

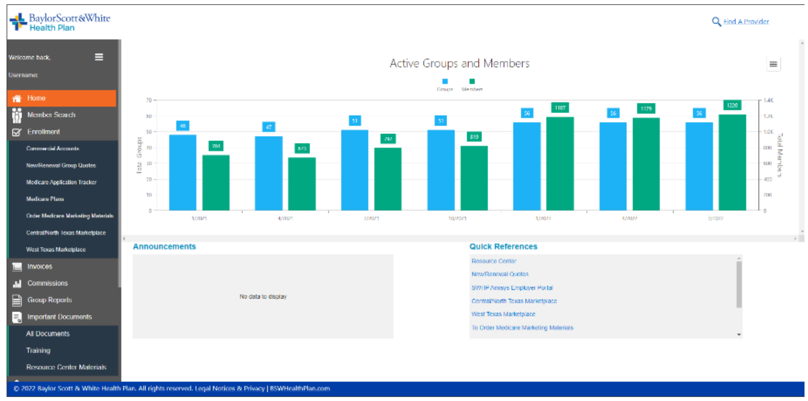


IMPORTANT: Only check "Assign Full Administrator Permissions" if you are designated in your organization to do so.

❹ *Click **Continue** to advance from one screen to the next and activate your profile/access the portal.*

Step 2

Once inside the agent portal, click the various options listed in the left margin to access the functions/actions.



Menu Options / Functions

Tab Name	Available Options/Functions
Home	A dashboard for your group's information, including: ▪ Total active groups and members (by month), ▪ Announcements ▪ Quick reference links.
Member Search	▪ Search by Member ID ▪ Select Member Information (dropdown menu) ▪ View ID Cards for group member(s)

Enrollment	▪ The **Accounts** screen lists all your group accounts.
	  ▪ Click on the hyperlinked Account Name to open that group's detail page
	▪ The **Account Details - Enrollment** screen lists the following:
	  ▪ Employer group details
	  ▪ Membership information for all members within the group
	    ▪ *NOTE: Click the arrow next to the Group Name to access functionality for Add Subscriber.*
	    ▪ *Click one of the actions column links to make changes to a current subscriber's account.*
	▪ The **Group Census** page allows you to export a group census, edit, and upload the electronic enrollment form
	▪ To open a prospective quote in StepWise, click on **New Quotes and Renewals**
	▪ To manage HealthConnect accounts, click on **HealthConnect**

Tab Name	Available Options/Functions
	▪ To open the **BSWHP Softheon** portal, click **Central Texas/ North Texas Marketplace** and choose between Online and File Upload options ▪ To open the **FirstCare Softheon** portal, click **West Texas Marketplace** and choose between Online and File Upload options ▪ To visit the **Medicare Enrollment Portal** and view marketing information, click on **Medicare Plans** ▪ If you are ready to sell BSWHP Medicare Plans and want to **order marketing materials**, click **Order Medicare Marketing Materials.** ▪ For information about submitted applications, click on **Medicare Application Tracker**. Must complete all fields (Agent NPN, Writing Number, Email and ZIP) to search.
Invoices	▪ Listing of account invoices for your group(s) ▪ Results can be sorted by time (30 days, 60 days, 6 months, or for a specific date range) ▪ Displayed by Invoice Number, from/to dates, premium due date ▪ View invoices by clicking the "View PDF" button or the Invoice Number

Commissions	▪ Listing of Agent Commissions - viewable only for Agent portal account with Full Administrator Permissions. For all others, this menu option will be hidden.
	▪ Split between Marketplace and Commercial commissions
	  ▪ **Marketplace** commissions are displayed via our Iconixx portal
	    ▪ Reporting period can be selected via the dropdown menu and targeted by region (if necessary)
	  ▪ **Commercial** group commissions are listed by Group ID and Group Name
	▪ Report from/to dates can be adjusted for specified time periods

Group Reports	Standardized reports for your Large Group clients (by account number/name)

All Documents	▪ An online repository for documents (i.e., plan documents, member materials, sales collateral, etc.)
	▪ Information listed includes:
	  ▪ Document title
	  ▪ Type
	  ▪ Product

Tab Name	Available Options/Functions
	▪ Process category ▪ Region ▪ Language Benefit documents are accessed via the Plan Documents tab.
View/Edit My Info	Here you can edit/update the following: ▪ Baylor Scott & White Agent Portal account – Change password and/or email address ▪ Agent Information – Edit contact info (i.e., address, phone number, etc.)
Message Center	▪ My Messages ▪ Lists messages sent to the agent by BSWHP, including confirmation of actions within the portal ▪ Query/sort by time (30-days, 90-days, all open) or by date range ▪ Send a Message allows the group to: ▪ Send a secure message to Baylor Scott & White Health Plan ▪ Attach files (Word doc, PDF, .txt, or Excel files)
Contact Us	▪ Contact your Client Management Team representative
Log Out	▪ Logs you out of Baylor Scott & White Self-Service Agent Portal

Create a Shortcut

Once you've accessed BSWHP Self-Service Agent Portal, create a shortcut for quick and easy connection the next time you log on:

Apple (iOS) device

1. Open **Safari**
2. Open **Broker.BSWHealthPlan.com**
3. Tap **Upload** icon in bottom navigation bar
4. Tap **Add to Home screen** icon
5. **Confirm** or adjust the title you want to display below the shortcut icon
6. Tap **Add**

Android device

1. **Launch** the web browser on your device
2. Tap **Menu** button
3. Select **Bookmarks**
4. Long-press any bookmark and then tap **Add Shortcut to Home screen**

Questions?

If you have any questions about accessing the Agent Portal, please contact Your Client Management Team representative.