

Individual Sales Checklist for New Producers

Here's your to-do list before helping a client find an ACA qualified health plan.

☐ Register to use Blue Access for ProducersSM

[Blue Access for Producers](#) (BAPSM) gives you access to a suite of tools to help you manage your business. When you onboard with us, you get a 9-digit Producer ID. That's all you need to open an account on BAP.

Action Items

1. Once you onboard with us, get your 9-digit producer ID and go to [Blue Access for Producers](#).
2. Download the [Quick Start Guide](#). Follow the instructions and register to use BAP today.

☐ Complete Federally Facilitated Marketplace (FFM) Training

CMS requires us to verify your registration status before paying you or your agency for an on-exchange sales.

Action Items

1. Check out the CMS guide for [new producers](#) or [returning producers](#).
2. See CMS's [Registration and Training site](#) with the latest news and resources.
3. Complete all required training and registration steps BEFORE assisting clients.
4. Confirm your registration status via the [Marketplace Registration Tracker](#).

☐ Register to use the Retail Producer Portal for quoting and enrolling

The [Retail Producer Portal](#) is a comprehensive sales and service tool for the individual ACA market. The portal enables you to design and deliver quotes and enroll clients in Blue plans virtually.

Action Items

1. [If you aren't registered to use the portal, it's easy to do.](#)
2. After registering, [see this resource page](#) on everything you need to know about the Retail Producer Portal.
3. There are two pathways for enrolling your clients in an individual ACA Blue plan via the portal:
 - Review instructions on the [OFF-EXCHANGE enrollment pathway](#)
 - Learn about the new [ON-EXCHANGE pathway powered by HealthSherpa](#).

☐ Learn about our retail product line

The plan year 2023 Individual & Family Markets (IFM) Open Enrollment Sales Training for Producers includes an overview of our individual product line. It also covers networks, pharmacy benefits and much more.

Action Item

To access sales training, log into [Blue Access for Producers](#), click on the "INDIVIDUAL" icon, select "Training, Admin & Tools" and choose "Annual Individual Product Training."

☐ Use marketing and sales resources when working with clients

Action Items

1. See our [Producer Retail Readiness microsite](#). It has links to everything you need to market, sell and enroll.
2. Use our [Producer Supply Portal](#) to order and ship sales kits. For more on the portal, [go here](#).