

Instructions for PA Medicare Certification

OVERVIEW

Agents selling Medicare Advantage are required to complete the Independence Medicare Certification process via Callidus.

Step 1: Independence Medicare Certification Training

- 1) The agent will receive an email with instructions on how to log-in and complete the Independence Medicare Certification Process. A sample email has been provided below.

Independence Blue Cross Onboarding Invitation

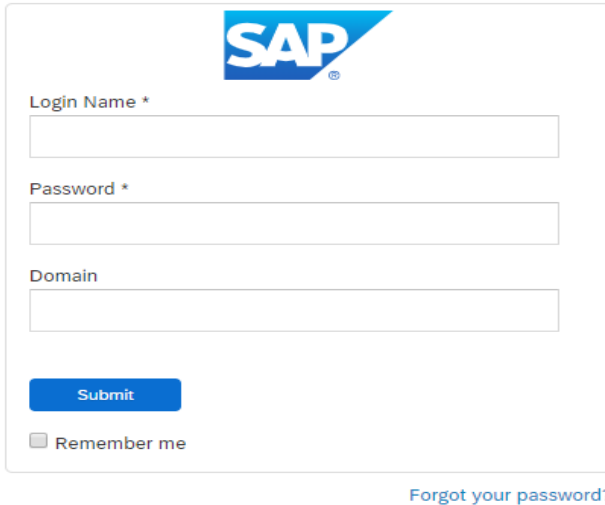
You have been nominated to onboard with us as an insurance producer. Please click the highlighted "Login" link to access the portal, and use the login name and password provided below to sign on.

| | |
|------------|-----------------------|
| Site URL | Login |
| Login Name | ██████████ |
| Password | ██████████ |

Step 2: Agent Log-In

Upon receipt of the invitation email (referenced-above), you will need to enter your credentials and log-in to the system.

Instructions for PA Medicare Certification



The image shows a SAP login form with the following fields and elements:

- SAP Logo:** Located at the top center of the form.
- Login Name *:** A text input field.
- Password *:** A password input field.
- Domain:** A text input field.
- Submit:** A blue button.
- Remember me:** A checkbox.
- Forgot your password?:** A link located below the form.


Login Name: This is your NPN (National Producer Number) which is included in your invitation email

Password: included in your invitation email

Domain: ibx (this will be pre-populated)

Step 3: Completing the “General” Tab

After your credentials are entered; click on the open cases assigned to you.

| Open cases assigned to me | | | | | Chart | Edit Columns | Refresh |  |
|---------------------------|------------|-----------------------------|----------------------|-----------------------------|-----------------------|------------------------------|-------------------------|---|
| Case Key | Case Name | Created On | Status | Updated | | | | |
| Onboarding-OB-4132 | [REDACTED] | 2020-01-28 02:47:36 PM, CST | Producer Application | 2020-01-28 02:47:51 PM, CST | | | | |

Please confirm your demographic information. This data will be pre-populated based on the information obtained by the applicable Department of Insurance.

Instructions for PA Medicare Certification

General Education Licenses Appointments Background Agreement

Please complete the required fields below.
Please save before exiting browser.

Personal Information

First Name [Redacted]
Middle Name [Redacted]
Last Name [Redacted]
Date of Birth [Redacted]
Social Security Number * [Redacted]
NPI [Redacted]
Email Address [Redacted]
Business Phone * [Redacted]
Mobile Phone [Redacted]

Business Address

Address Line 1 * [Redacted]
Address Line 2 [Redacted]
City * [Redacted]
State * [Redacted]
Zip Code * [Redacted]
FFM User ID [Redacted]

By voluntarily giving Independence Blue Cross my mobile phone number, I authorize Independence Blue Cross and its subsidiaries (collectively "Independence") to send me information/data about Independence, including, but not limited to, information about my account and other insurance products and services. Independence may contact me via email, automated text, and/or phone call. Message and data rates may apply for texts. Not required to purchase goods and services from Independence Blue Cross. Text STOP to stop and HELP for help. Terms and conditions at www.myhelpsite.net/ibx. Any information provided by me to Independence is subject to Independence's Privacy Policy.

Additional Addresses [Redacted]

Save Submit

Then select "Save"

Step 4: Completion Education Courses

- 1) Click on the "Education" tab

Instructions for PA Medicare Certification

General **Incomplete** **Education** Licenses Appointments Background Agreement

Your education and certification must be completed before you can submit your onboarding application. Our Litmos Learning Management Website is displayed in a frame below. You will see the appropriate "Learning Path" assigned to you. Click the learning path to begin, then look for the green "Start/Continue this Learning Path" button to guide you through the steps in your training. You MUST complete all required courses in Litmos before you can continue.

You will also receive an email from system@litmos.com which contains a link to the Litmos site. If you need to complete training later, you may use the link referenced in the email.

Once you complete all assigned courses, return to this page and click the "Refresh" button. Your completion status will update and you will be able to continue your application.

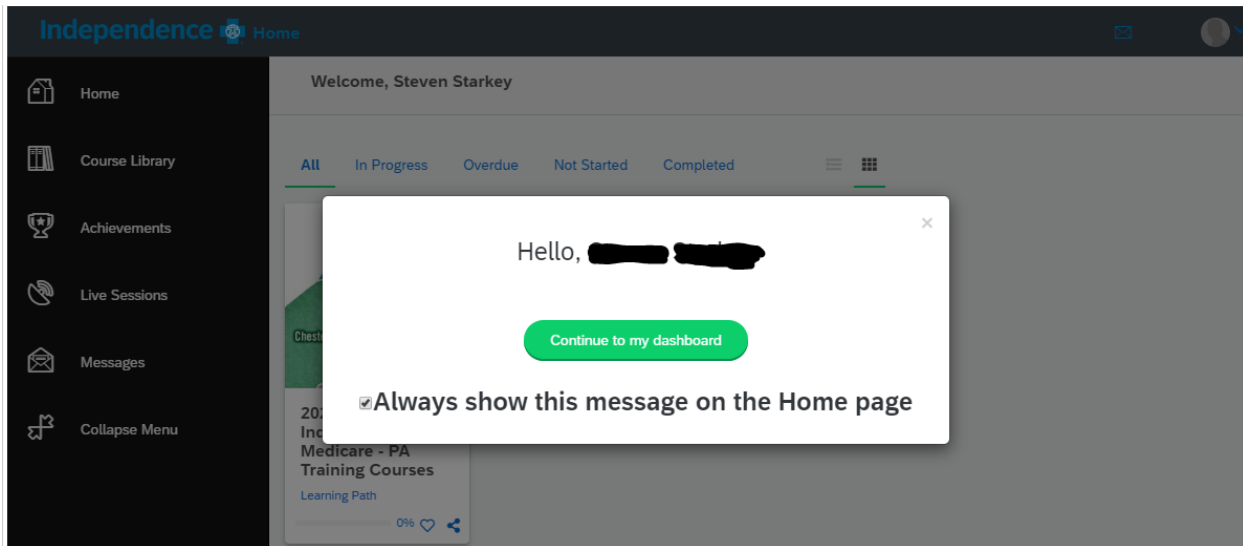
When you have completed all requirements, click the "Submit" button below to move your application to the next stage.

Course Table 🔍

| Course Name | Status |
|---|----------------|
| 2020 Certification - Medigap Survey | 0% completed |
| 2020 Group Medicare Advantage Training Election | 0% completed |
| 2020 Independence Code of Conduct | 100% completed |
| 2020 Individual Medicare Advantage Product Certification BCPA | 50% completed |
| 2020 Individual Medigap/Freedom Certification MEDGAP | 0% completed |
| 2020 Medicare Core Certification AHIPTC | 0% completed |
| 2020 Onboarding - Next Steps | 0% completed |

[Refresh](#)

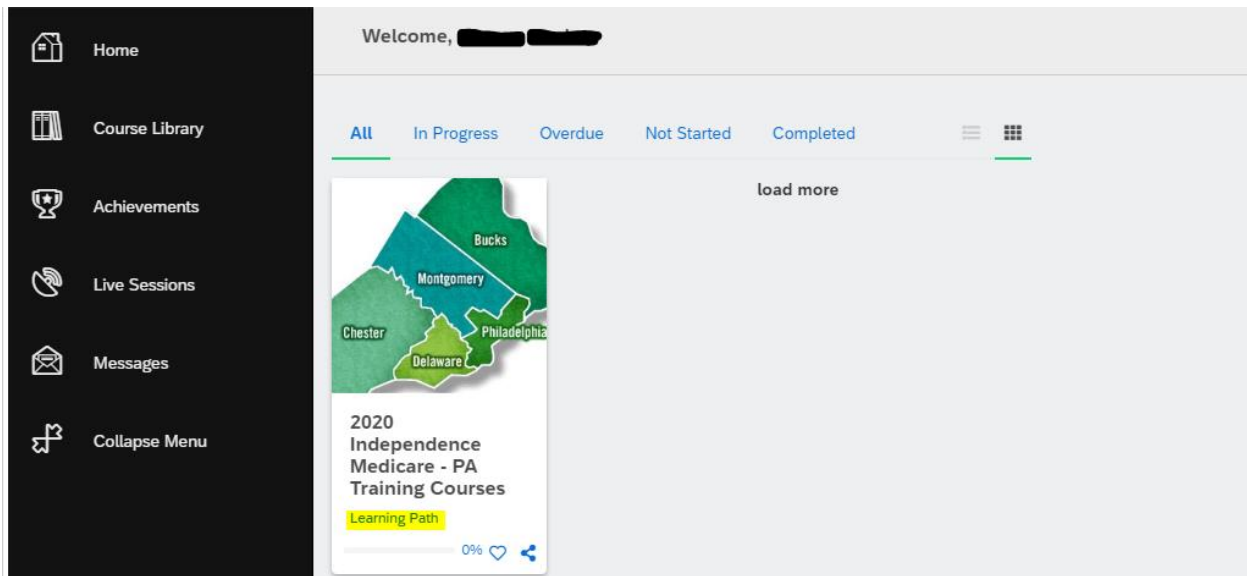
2) Then scroll down to complete the required training modules; select "Continue to my dashboard"



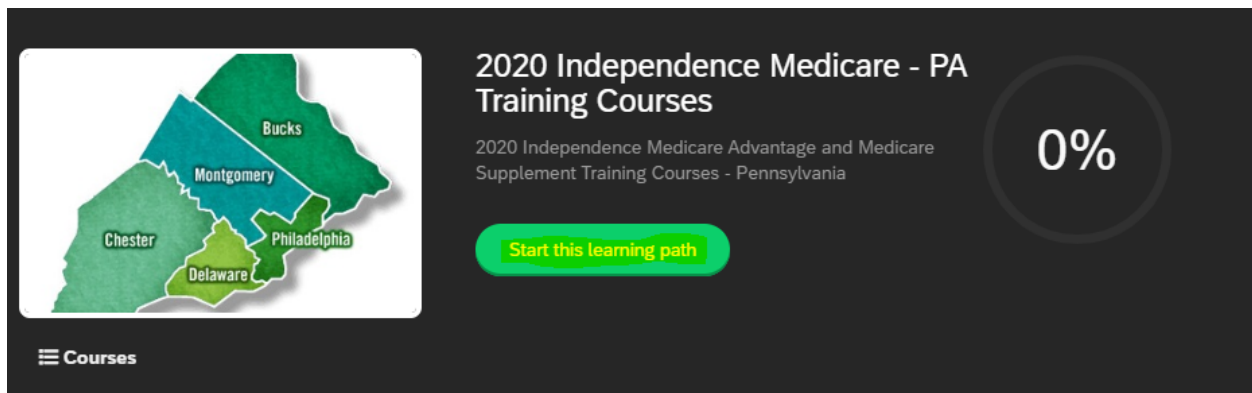
The screenshot shows the Independence Home dashboard. A notification box is displayed in the center, containing the text "Hello, [redacted]" and a green button labeled "Continue to my dashboard". Below the button is a checkbox labeled "Always show this message on the Home page" which is checked. The background shows a sidebar with navigation options like Home, Course Library, Achievements, Live Sessions, Messages, and Collapse Menu. The main content area displays "Welcome, Steven Starkey" and a list of training courses, including "2020 Medicare - PA Training Courses" with a "Learning Path" link and a "0%" completion indicator.

3) Then select the appropriate Learning Path

Instructions for PA Medicare Certification



4) The “click” on Start this learning path



5) Proceed through all required training. Once required training is completed; click refresh.

Instructions for PA Medicare Certification

Course Table ⬆

| Course Name | Status |
|--|----------------|
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| 2020 Group Medicare Advantage Training Election | 100% completed |
| 2020 Independence Code of Conduct | 100% completed |
| 2020 Individual Medicare Advantage Product Certification IBCPA | 100% completed |
| 2020 Individual MedigapFreedom Certification MEDGAP | 100% completed |
| 2020 Medicare Core Certification AHIPTC | 100% completed |
| 2020 Onboarding - Next Steps | 100% completed |

7 total rows, displaying from 1 to 7

6) Please be sure to transmit your AHIP data by logging in to our AHIP portal at the link below

<https://www.ahipmedicaretraining.com/clients/ibx>

After logging into your AHIP account you will see the screen below, be sure to click continue to share your AHIP completion info with us electronically.



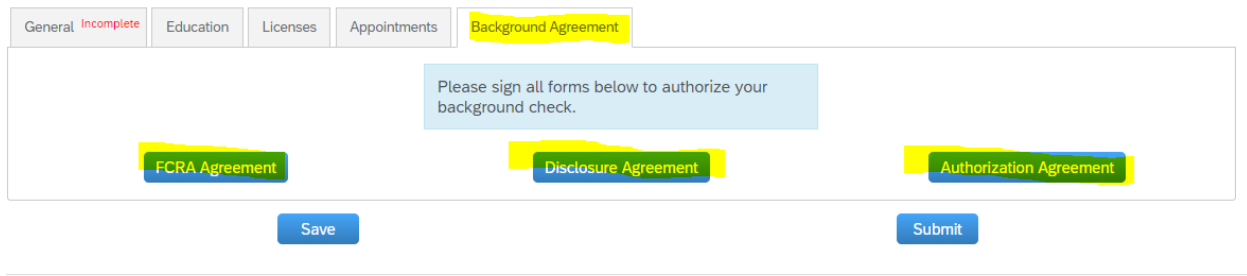
Step 5: Background Check

*Note: producers new to IBC require a background check prior to getting appointed. Producers that are already appointed and exist in IBC systems do not require a background check

Generally, it takes 24-48 hours to receive the results of a background check.

Instructions for PA Medicare Certification

1) You must complete the background agreement authorization forms prior to IBC conducting a background check. Please complete the authorization forms highlighted below



2) After completing the required forms please click “Save” and “Submit”.

Step 6: Certification Review

Once all the required steps and courses are complete and you submit your application to sell Independence Medicare Plans you will see the following:

Thank you for submitting your application to sell our plans. A plan administrator will review your application and contact you if any additional information is needed.

You will be notified again when your application has been approved and your required state appointments have been confirmed.

PLEASE NOTE, YOU ARE NOT CERTIFIED TO SELL UNTIL YOUR APPLICATION HAS BEEN REVIEWED AND APPROVED.

You may close this window.

Step 7: Completion Email

Once your certification is approved you will receive email confirmation (see below)

Instructions for PA Medicare Certification

Congratulations!

Your application to sell our insurance products has been reviewed and **approved** by Independence. You are now appointed to all applicable entities, and approved to market and discuss our insurance offerings with your clients and prospects, in accordance with all applicable plan rules and government regulations and guidelines.

Thank you for choosing to represent Independence

Sincerely,

Independence