AccessBlue Delegated Access Management

Producer User Guide

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Introduction

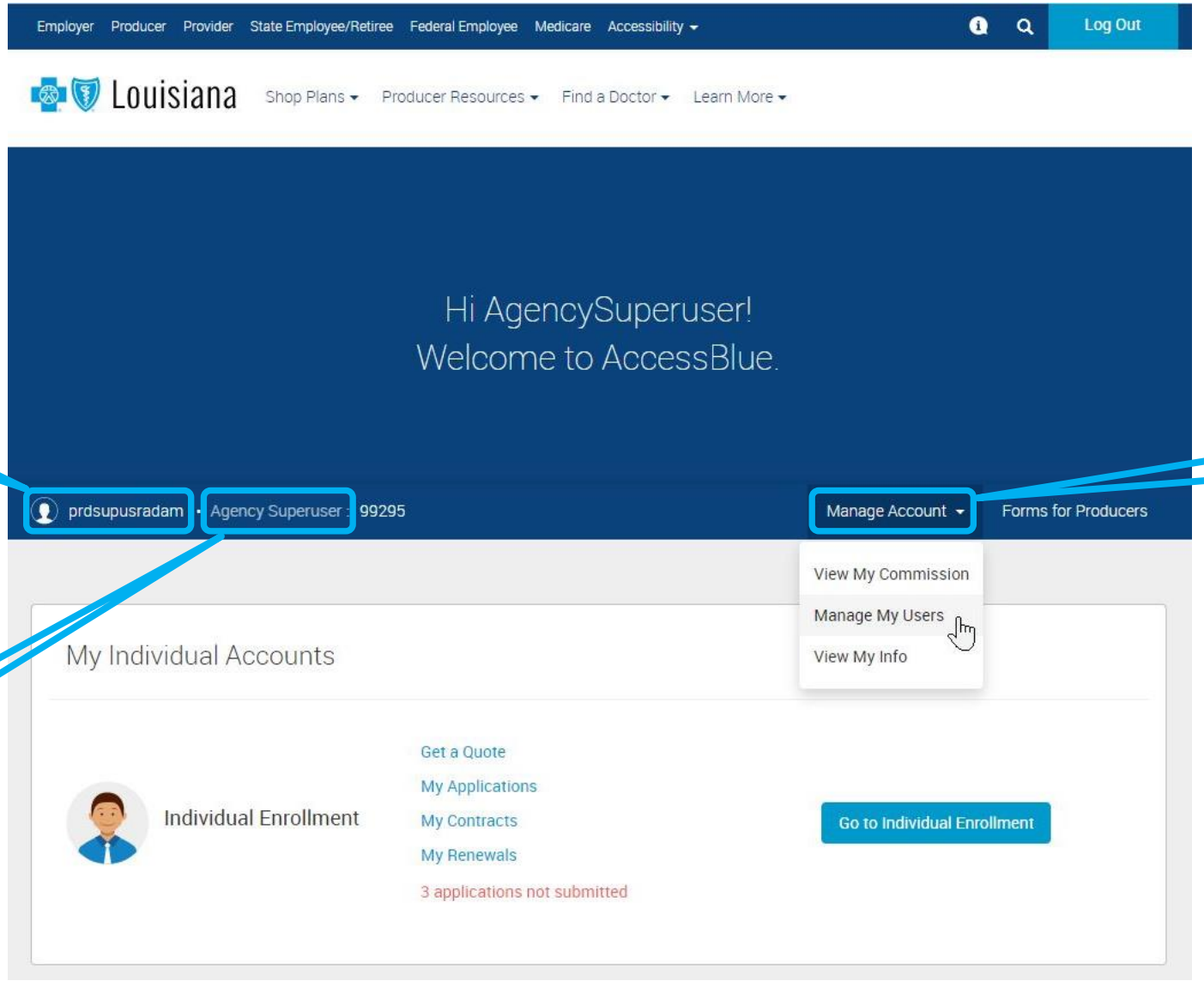
Introduction

- This guide will walk you through the new Delegated Access Management functionality in the AccessBlue Producer Portal.

- You can now add delegates called Agency Admins and grant them access to tools available in AccessBlue such as coverage and eligibility, eBilling, eEnrollment, group reporting, individual enrollment, and ordering ID cards.

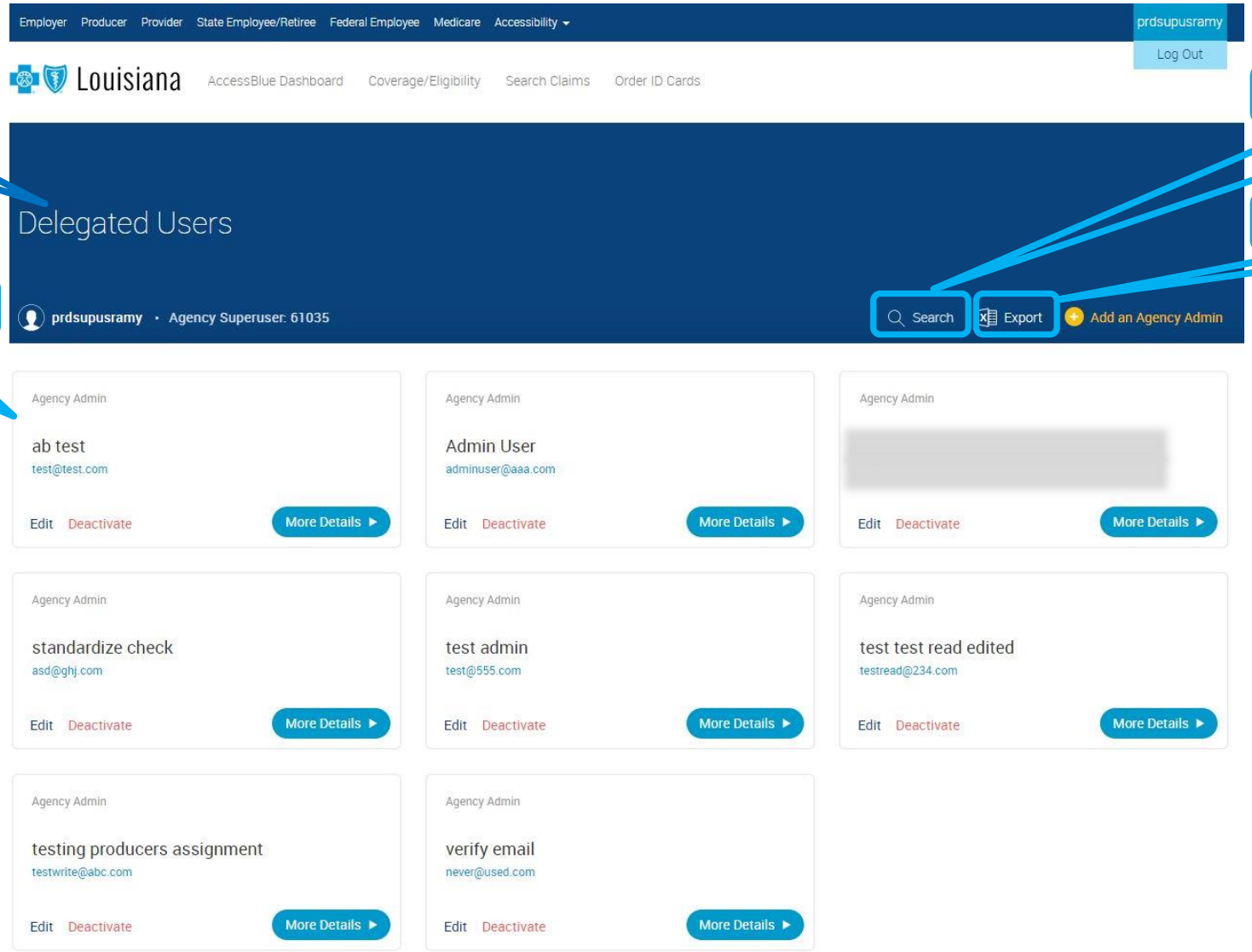
Welcome Screen

Welcome Screen



Manage My Users

Manage My Users



Delegated Users Dashboard

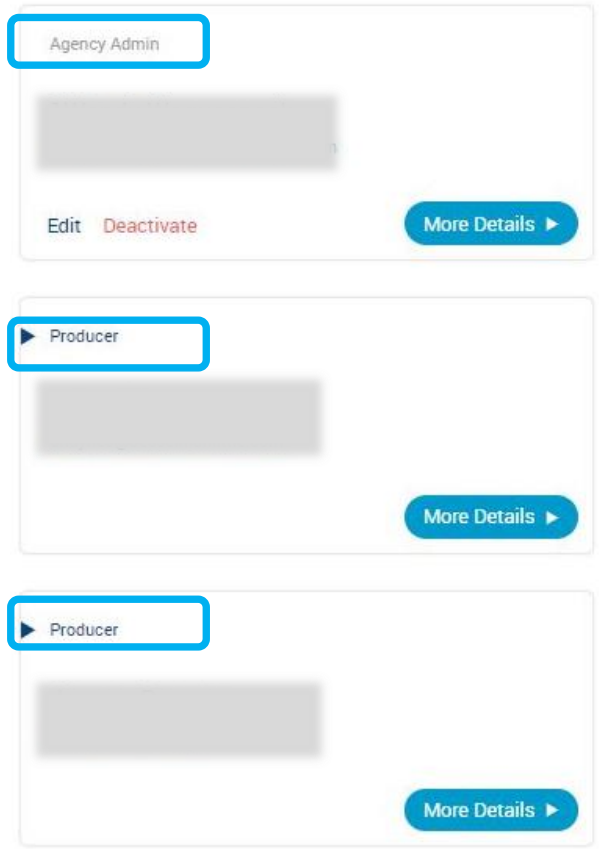
1 **View cards for existing delegates.**

2 **Search for delegates by name.**

3 **Export list of delegates to Excel.**

Delegate User Types

Delegate User Types



Agency Superuser

- Receives access to all enrollment, billing, coverage, eligibility, reporting tools, eQuoting, and/or Individual enrollment
- Responsible for creating and managing additional delegate user accounts in the portal
- Can only edit or deactivate Agency Admins
- Tools are assigned according to the producer or agency contract type

Agency Admin

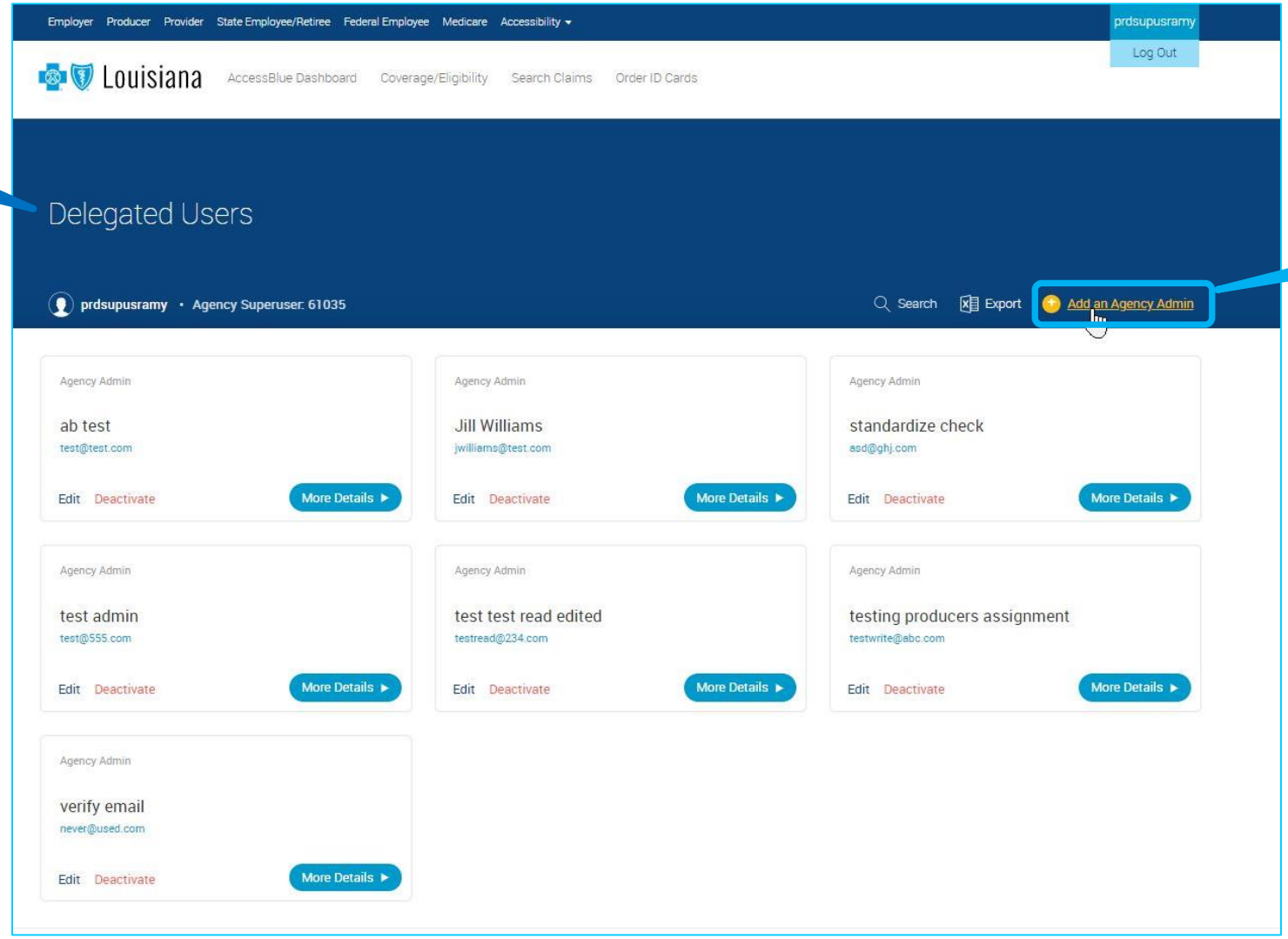
- Assigned on behalf of their producer or agency
- Right to access that producer or agency's book of business
- Read-only role
- Agency Superuser can edit or deactivate this role

Producer

- Receives access to all groups and/or individuals in the producer's own book of business
- Tools are assigned according to the producer's contract type
- Read-only role
- Only BCBSLA can edit or deactivate this role

Add a Delegate

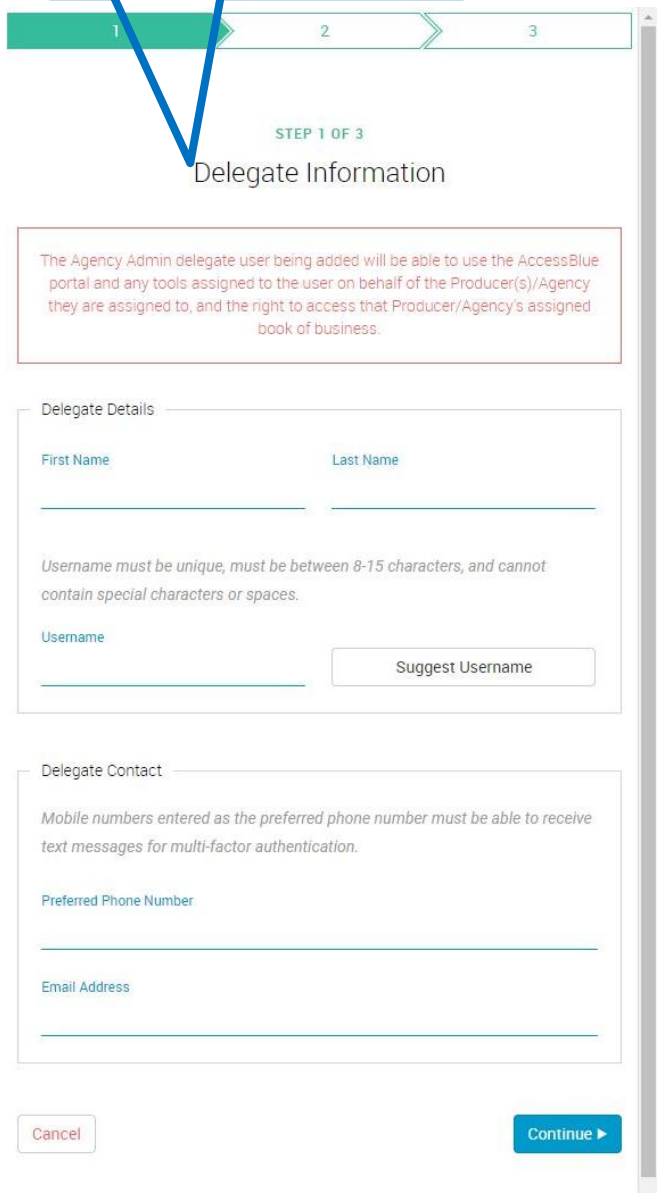
Add a Delegate

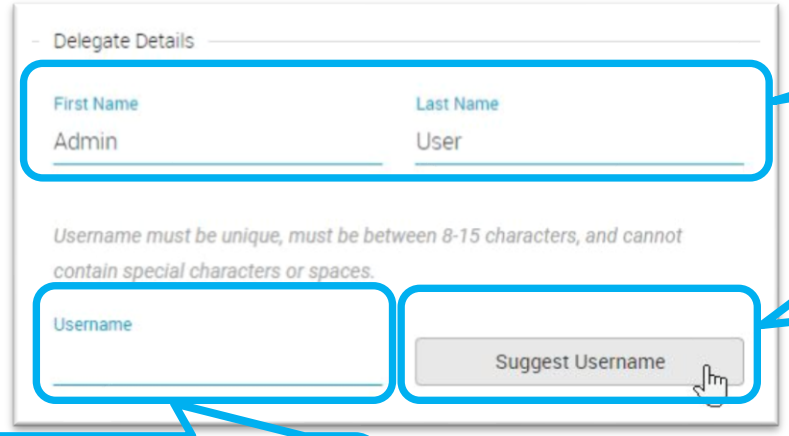


Delegated Users Dashboard

1 **Click Add an Agency Admin.**

Add a Delegate (cont.)

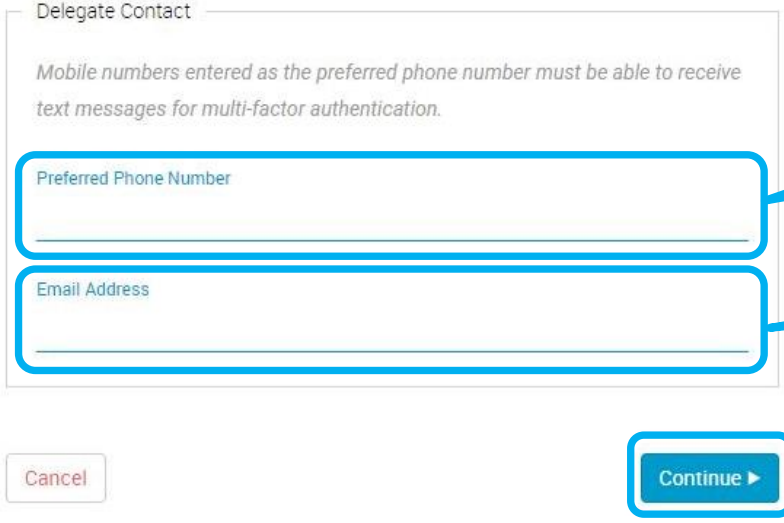




2 Enter delegate's first and last name.

4 If unsure what to enter as a username, click Suggest Username. This feature will use the delegate's first and last name followed by a random number at the end.

3 Enter a username for the delegate following the specified criteria.



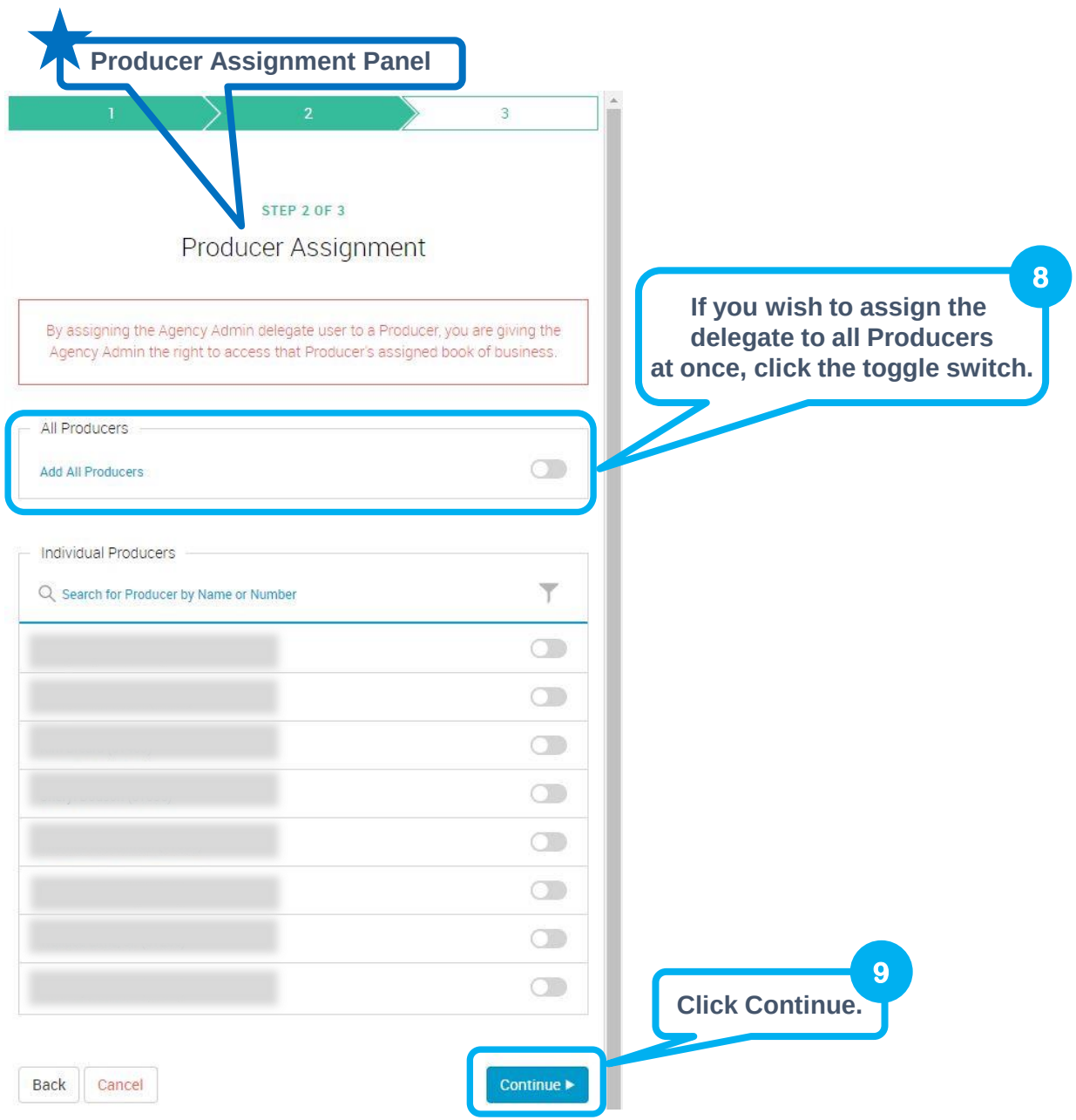
5 Enter delegate's preferred phone number **The phone number you enter MUST be able to receive text messages*.**

6 Enter delegate's email address.

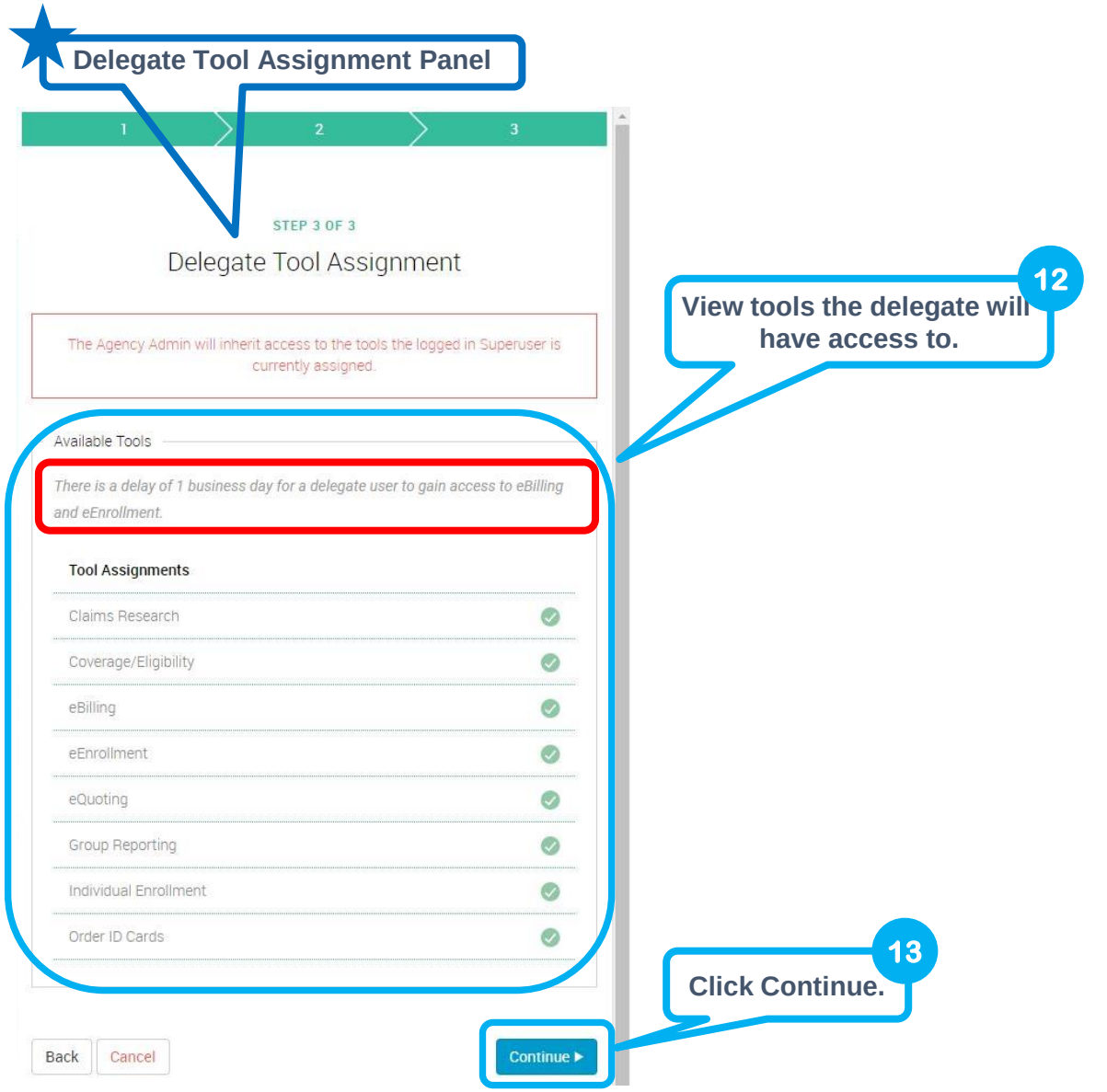
7 Click Continue.

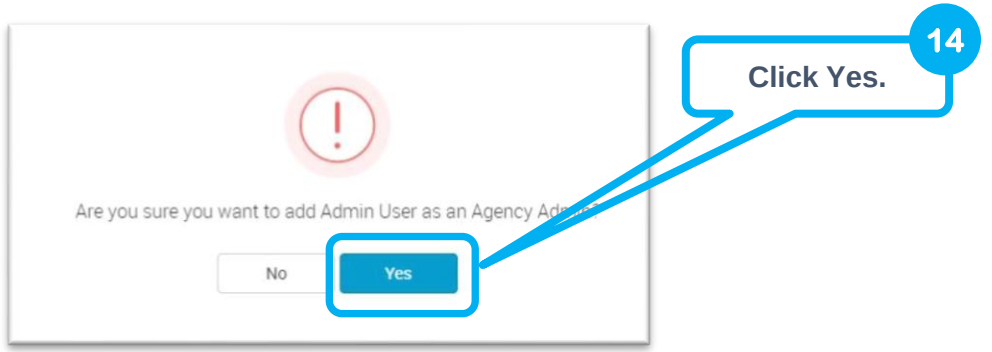
*This information will be used as a secondary authenticator and will prevent the user's password from expiring.
*This information will not be used as contact information unless it is documented in the user's contact record associated with their account.

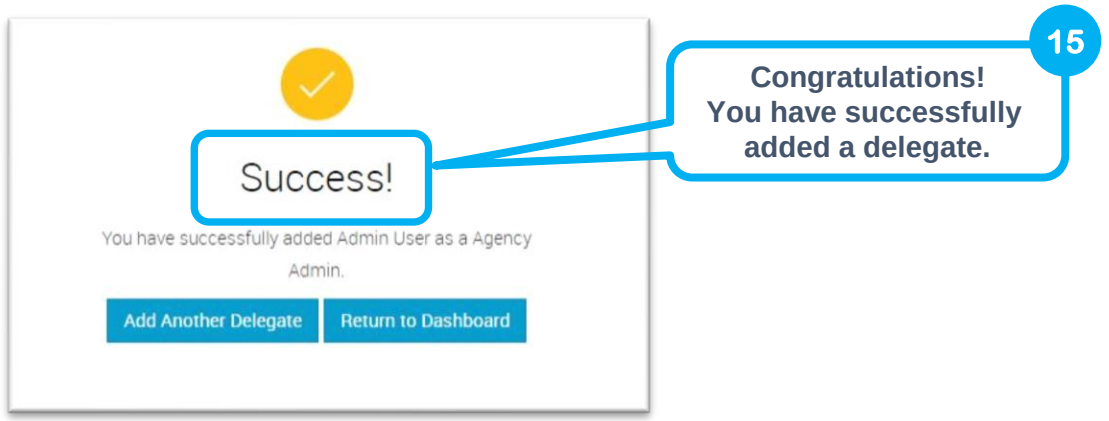
Add a Delegate (cont.)



Add a Delegate (cont.)







There is a one business day delay for a user to gain access to eBilling and eEnrollment.

Add a Delegate (cont.)

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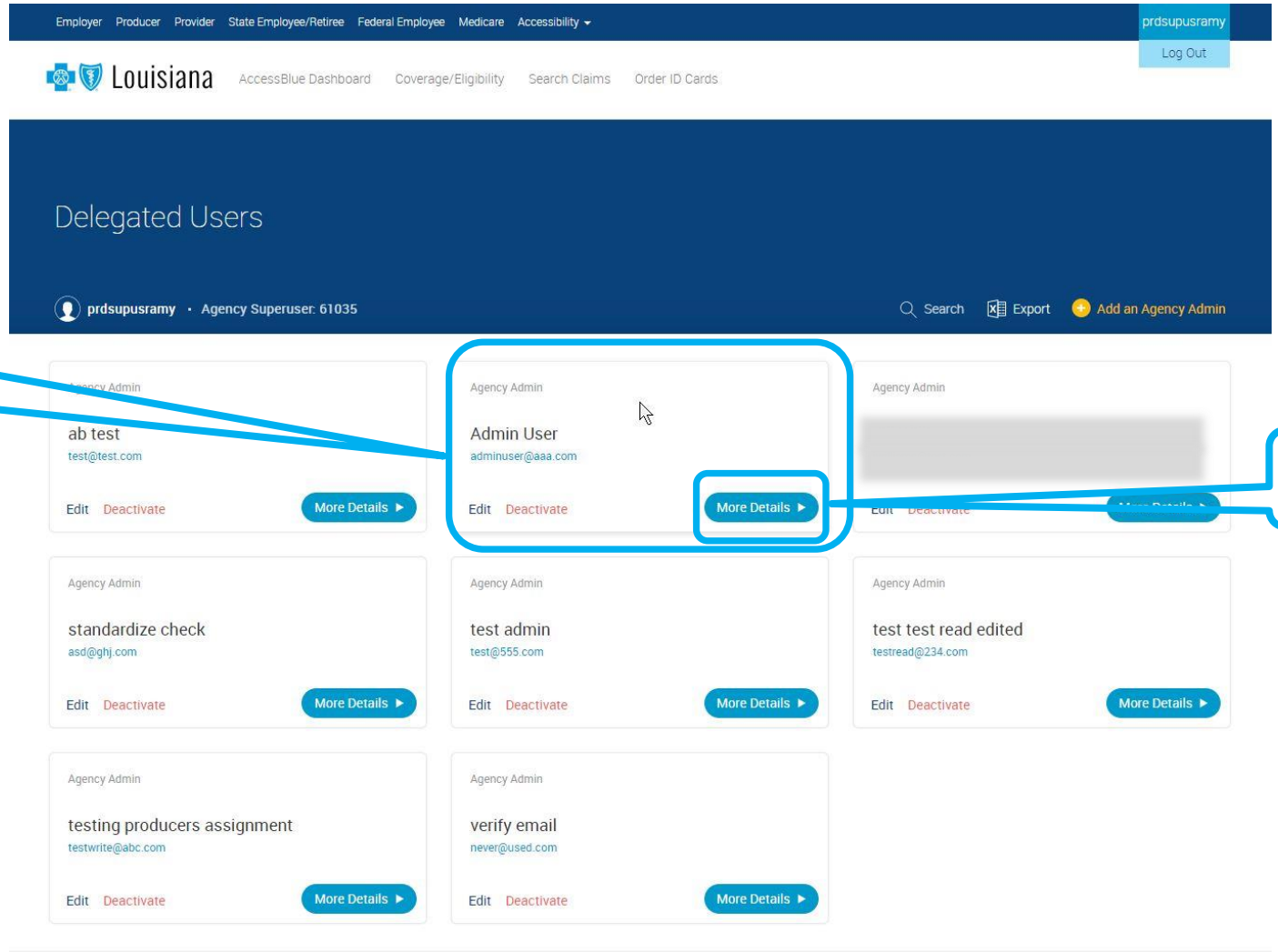
The newly added delegate's card is visible in the Delegated Users Dashboard.



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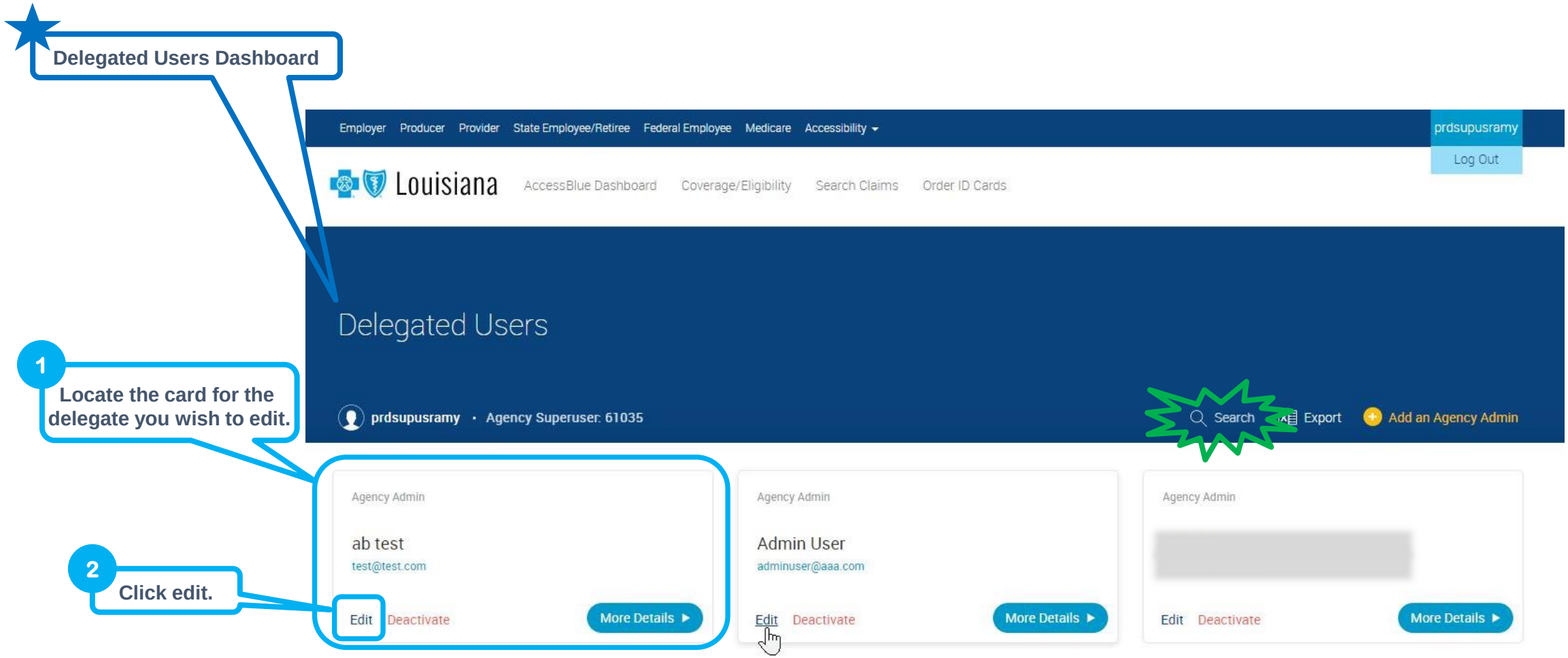
Click More Details to see a read-only view of the delegate's information.

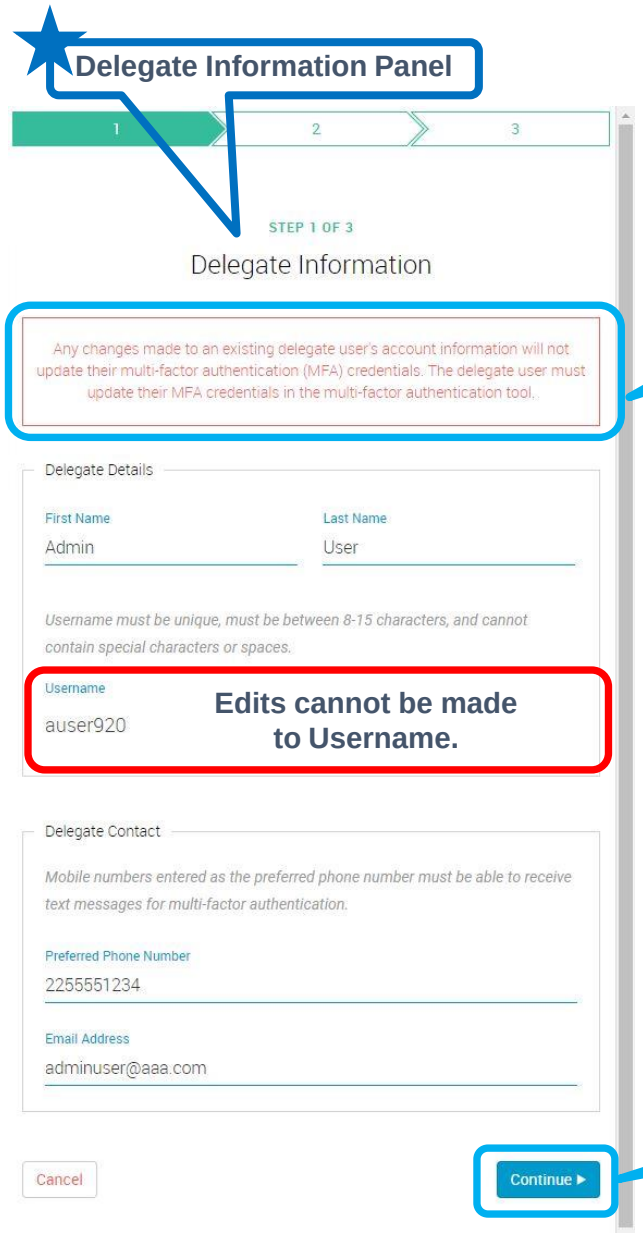
Edit a Delegate

Edit a Delegate



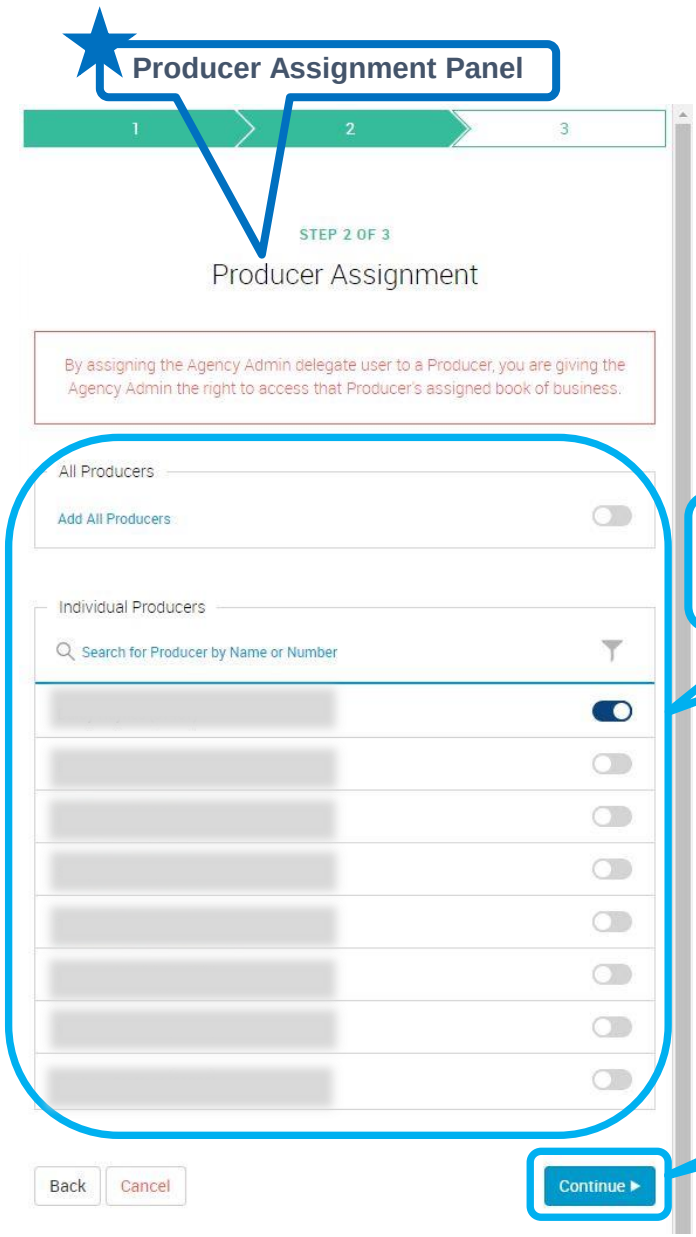
TIP! Use the Search field if you have several delegates.

Edit a Delegate (cont.)



3 Make any necessary changes to the delegate's information.

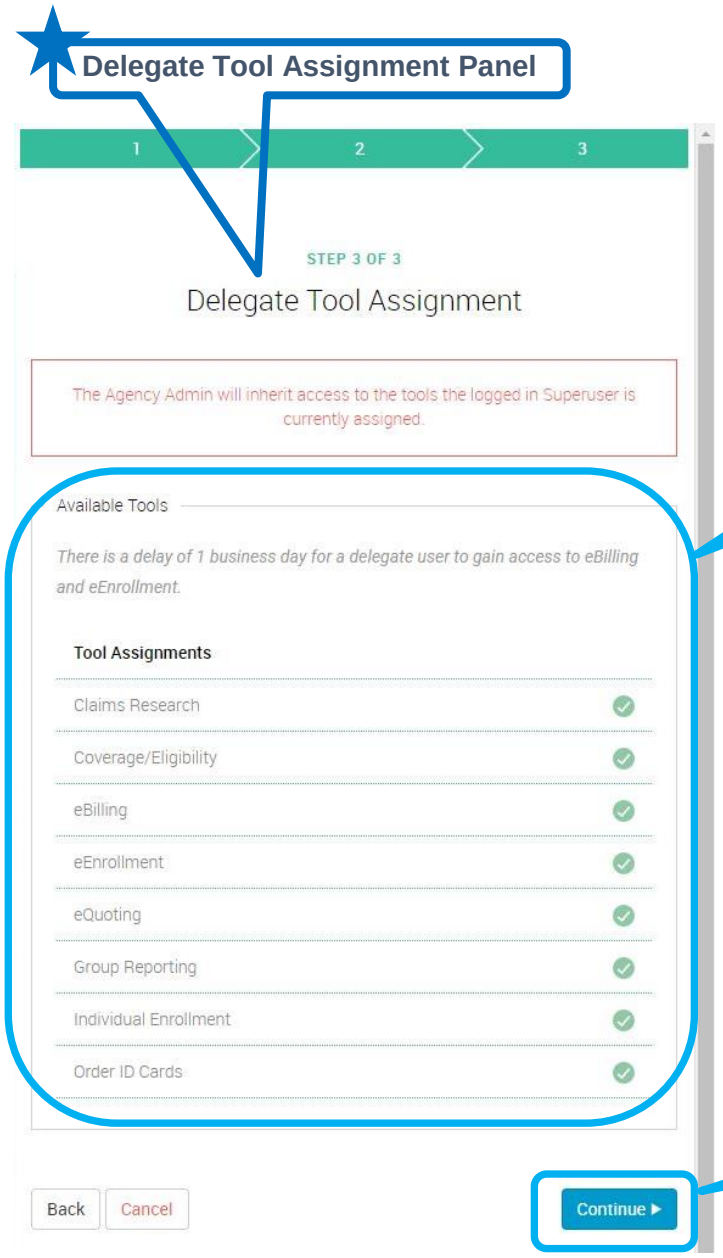
4 Click Continue.



5 Make any necessary changes to the delegate's Producer assignments.

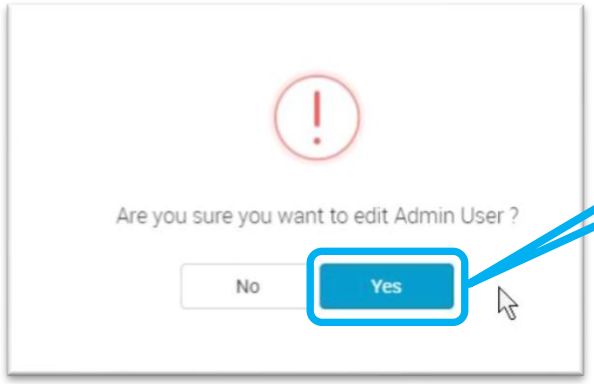
6 Click Continue.

Edit a Delegate (cont.)

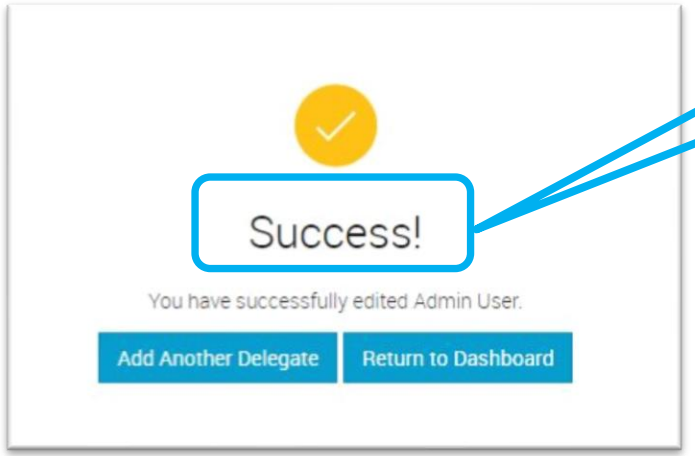


7 Make any necessary changes to the tools the delegate has access to.

8 Click Continue.



9 Click Yes.

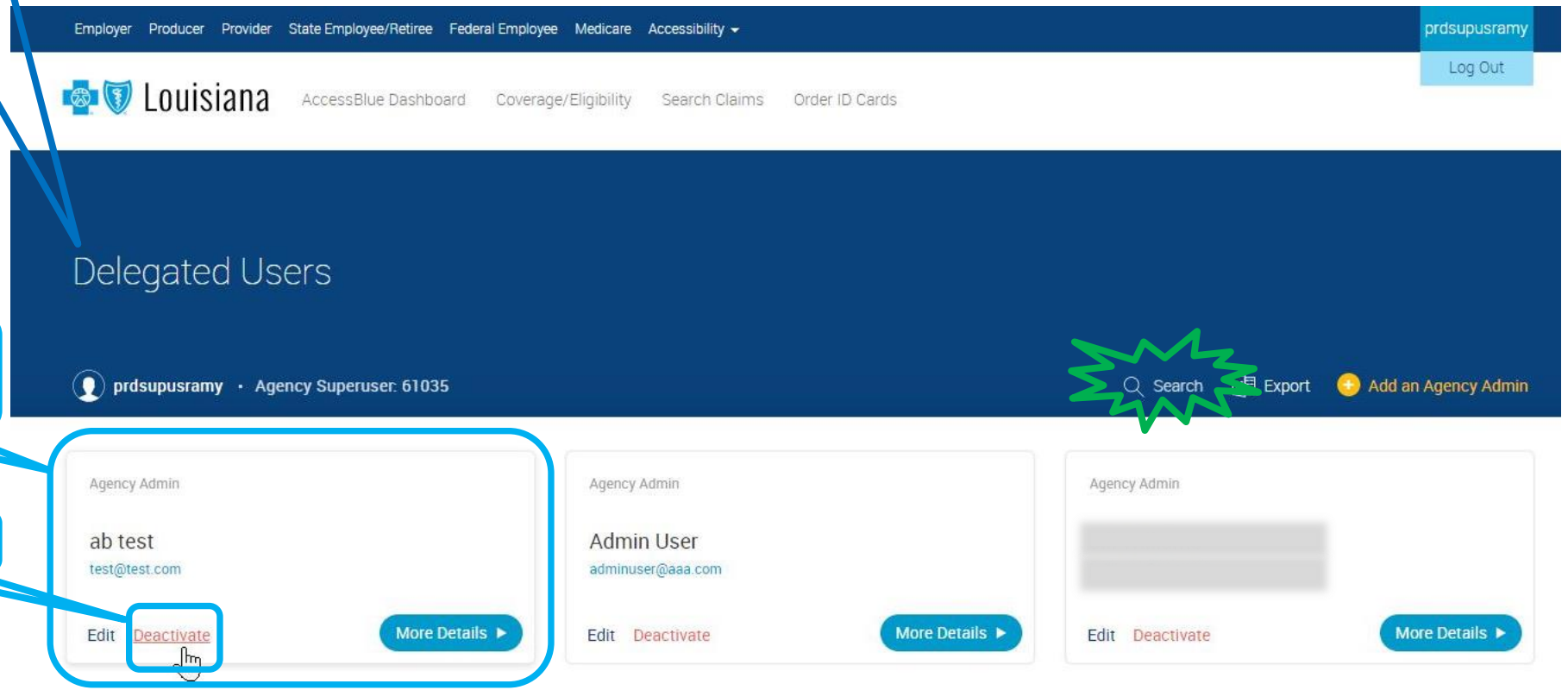


10 Congratulations! You have successfully edited a delegate.

Deactivate a Delegate

Deactivate a Delegate

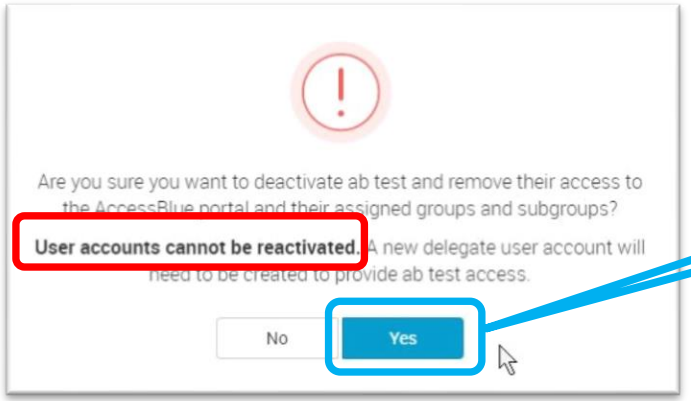
Delegated Users Dashboard



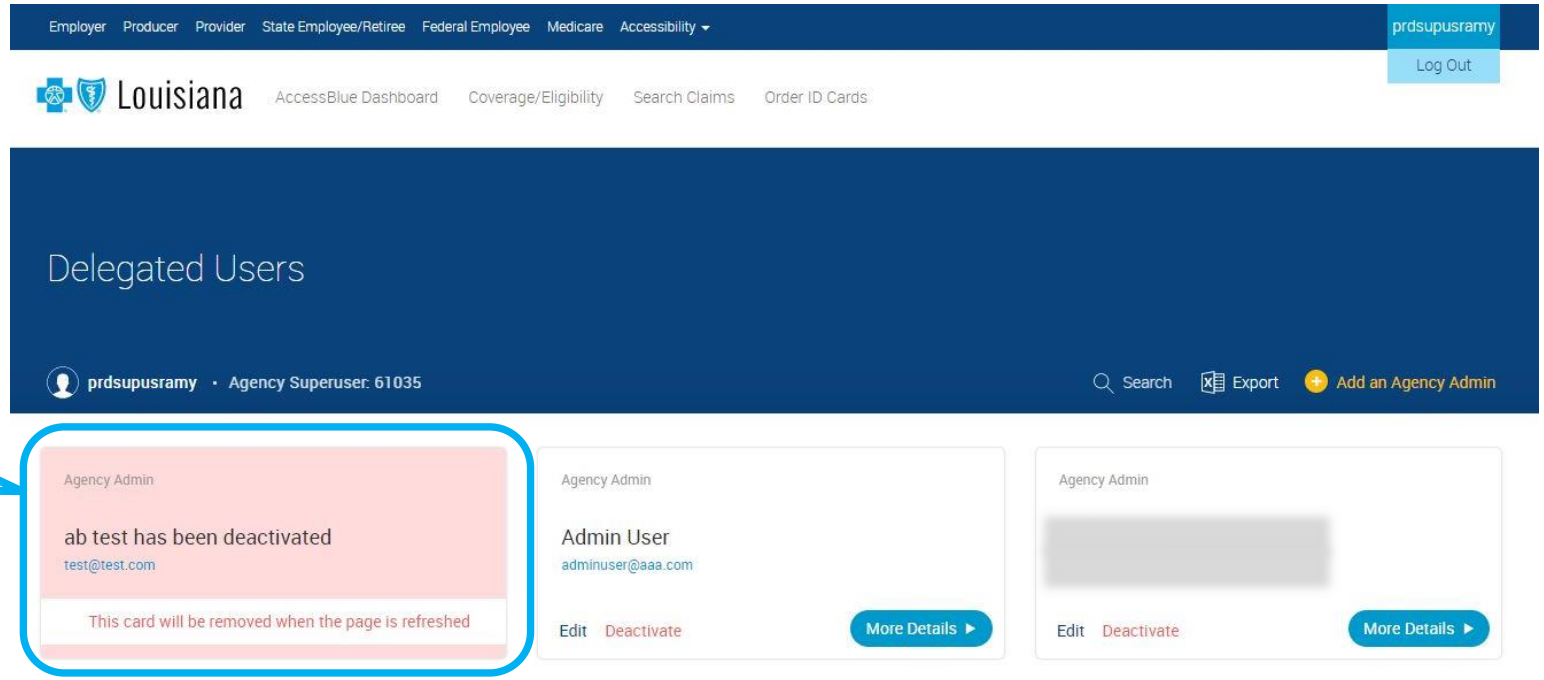
1. **Locate the card for the delegate you wish to deactivate.**
2. **Click deactivate.**

TIP! Use the Search field if you have several delegates.

Deactivate a Delegate (cont.)



3 Click Yes.



4 The deactivated delegate's Card will remain red until the page is refreshed.

REMEMBER! Requests to deactivate a Producer or Agency Superuser must be submitted to ProducerContracting@bcbsla.com.