Questions?

Email us at brokers@brighthealthplan.com
or call us at 1-888-325-1747
Monday-Friday 8:30am – 6:00pm (CST)

Agent appointment and credentialing quick reference guide

Welcome to the Bright Health appointment and credentialing process! We're excited to have you onboard as a partner and hope this guide is a useful tool to get you through the process quickly and efficiently.

There are two main steps to the appointment/credentialing process. Here is what you will need to complete your appointment, as well as your certification training (once it is available).

Step 1: Appointment

What you will need:

- Contact information (name, phone, email, address)
- Copy of **Errors and Omissions Insurance Policy (E&O)**
- If you're appointing under an agency, the agency's **tax ID number (TIN)**

Step 2: Certification & Training – An email will be sent when available

What you will need:

Medicare agents only

- Medicare Advantage course certification – you will need to upload your Gorman, AHIP, or Pinpoint certifications into the system
- Once the Bright Health product certification opens, login to the Bright Health appointment system and take the product training

Individual Federally Facilitated Marketplace (FFM) agents only

- Federally Facilitated Marketplace (FFM) certification – you will need to upload your FFM certification into the system

The following pages will walk you through step-by-step how to input your appointment information and what you can expect to see as you go through the process. As always, if you have any questions or comments about the process, please reach out to our Broker Services team and they will be happy to assist you.

▼1 - Initiate Onboarding

After selecting the onboarding link, you will be presented with this form. Here you will enter your first and last name, email.

bright HEALTH

You are browsing this page as guest user (Click here to login)

Onboarding

Fill out the fields below to get started.

Onboarding Type Agent

First Name *

Last Name *

Contact Email *
e.g. johndoe@site.com

Create

▼2 - Invitation Email

The process above will create your onboarding account. You will receive the email below containing your login credentials once you have initiated the onboarding process.

Password is case sensitive. **Do not copy and paste**, retype the temporary password into the login screen. It will appear in your onboarding email under your User ID.

bright HEALTH

Hi John Smith,

Welcome to the Bright Health appointment portal! Use the information below to log in and get started with the process. A step-by-step manual outlining the appointment process is available here.

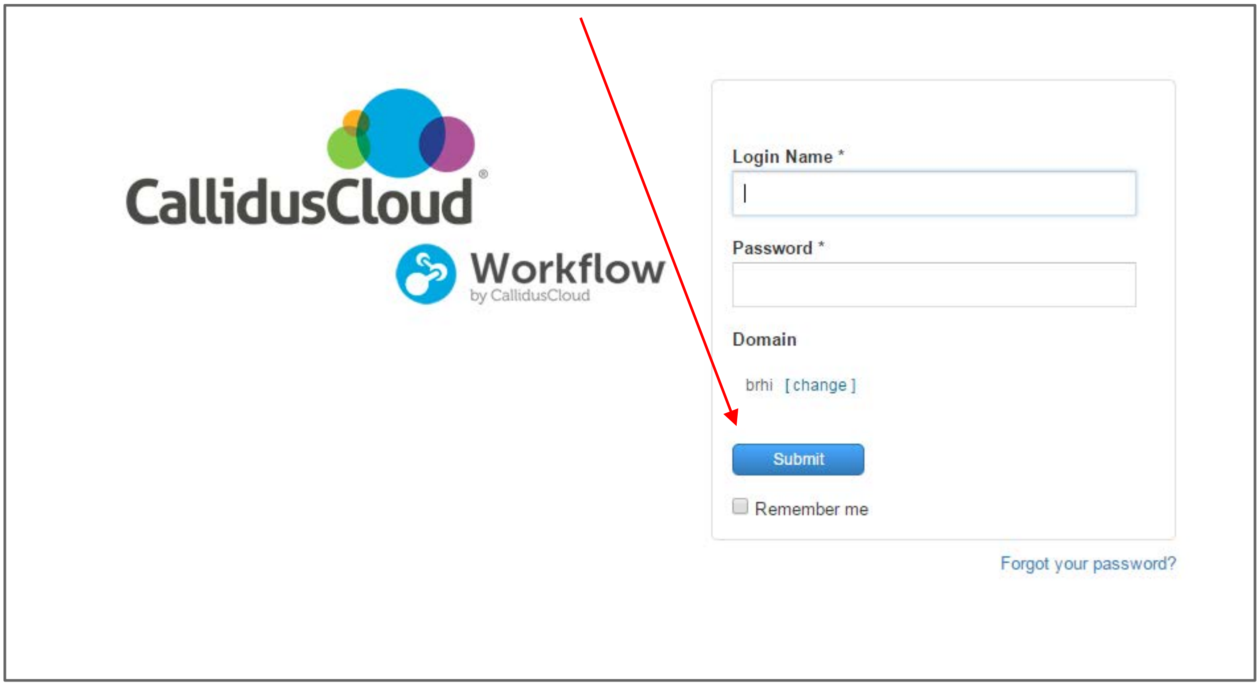
Bright Health is committed to providing the best possible experience to our broker partners. If there is anything that we can do to assist you in the appointment process please let us know by emailing brokers@brighthealthplan.com, or by calling 1-888-325-1747.

Kind regards,
The Broker Service Unit

Site URL	Login
User ID	clint.shiflett@whiteboard-it.com
Password	Ca[redacted]

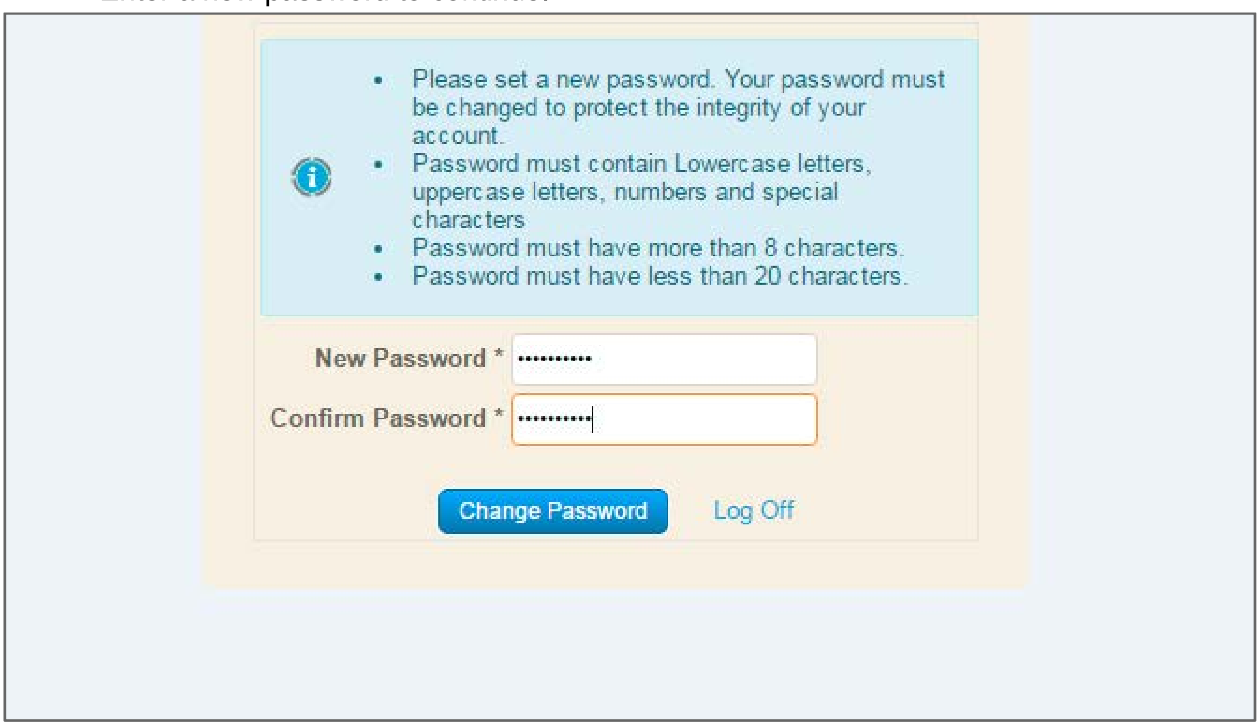
▼3 - Login

Enter your credentials and **press Submit**.



▼4 - Reset Password

Enter a new password to continue.



▼5 - Enter Application

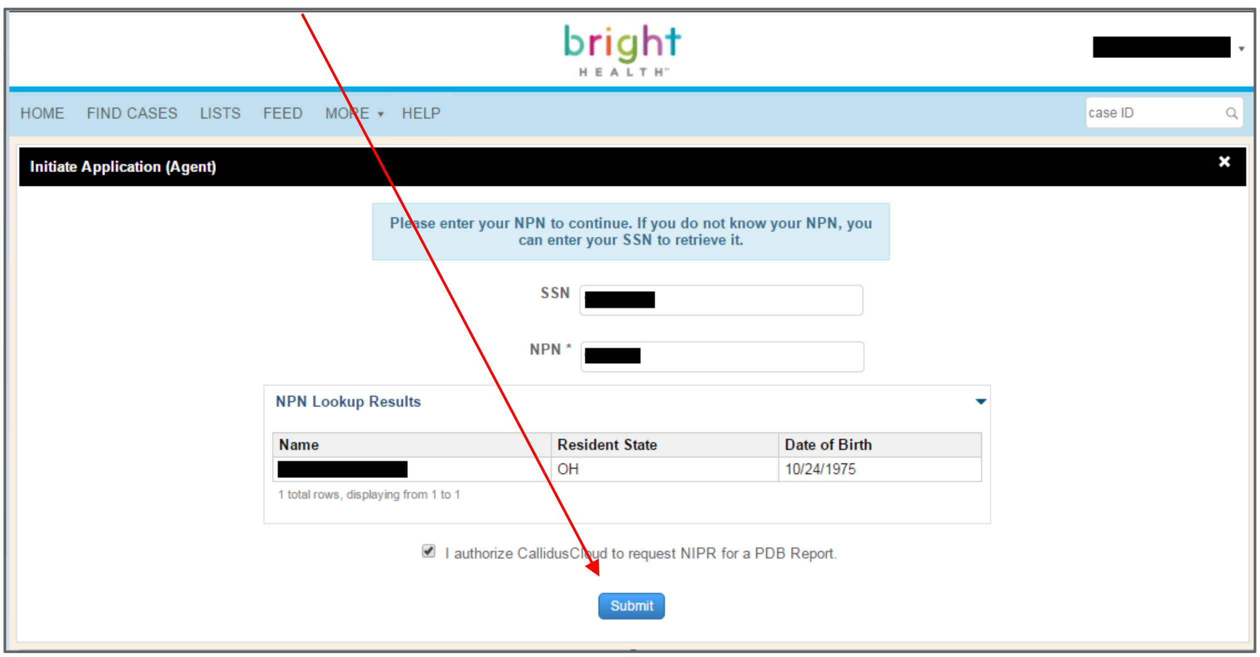
Select the link in the **Case Key column**.

▼6 - Get PDB Report

Enter your Social Security number and press **Tab**. Your National Producer number (NPN) will be retrieved.

Authorize the NIPR request for your Producer Database Report (PDB) report.

Press the **Submit button**.



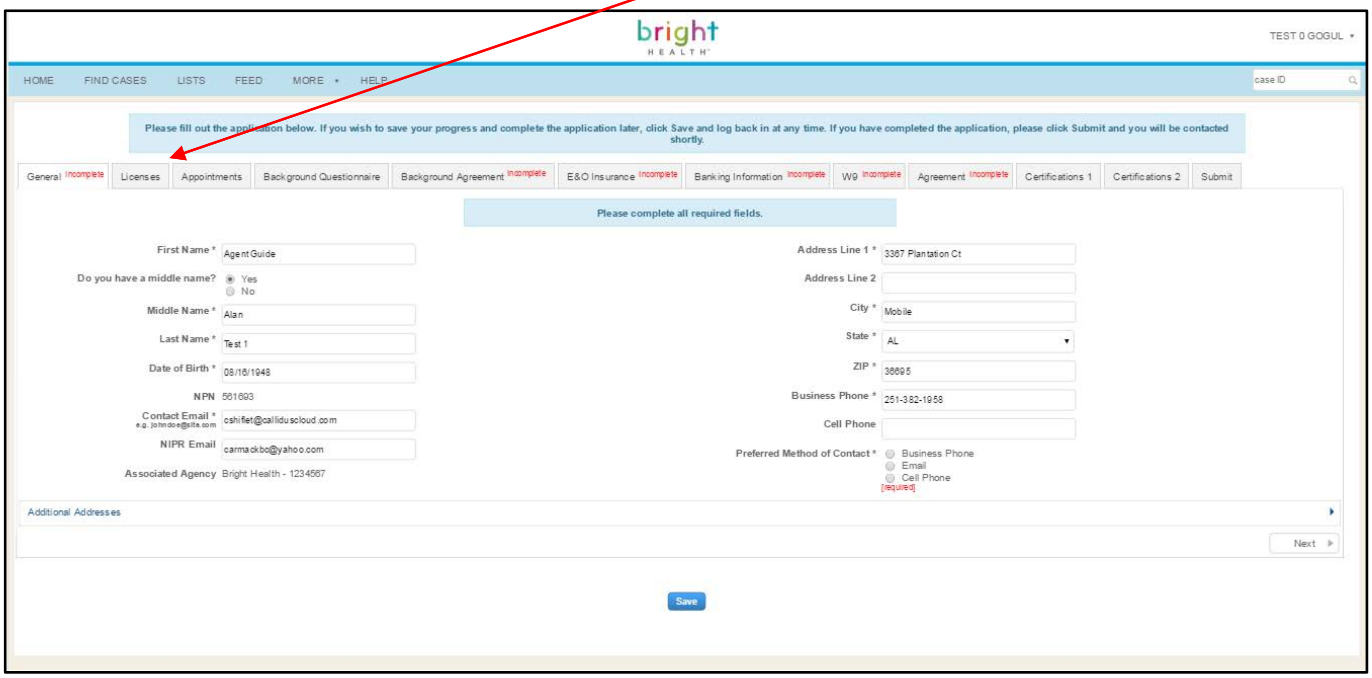
▼7 - General Tab

You will be taken to the General tab of your application.

Many fields on your application will already be completed with the information returned from the PDB report.

****Please note:** How you list your name here is **EXACTLY** how you will need to list your name throughout the appointment/credentialing process. If it does not match, you will not be able to complete your appointment/credentialing process.

Update and add information as needed, then go to the **Licenses tab**.



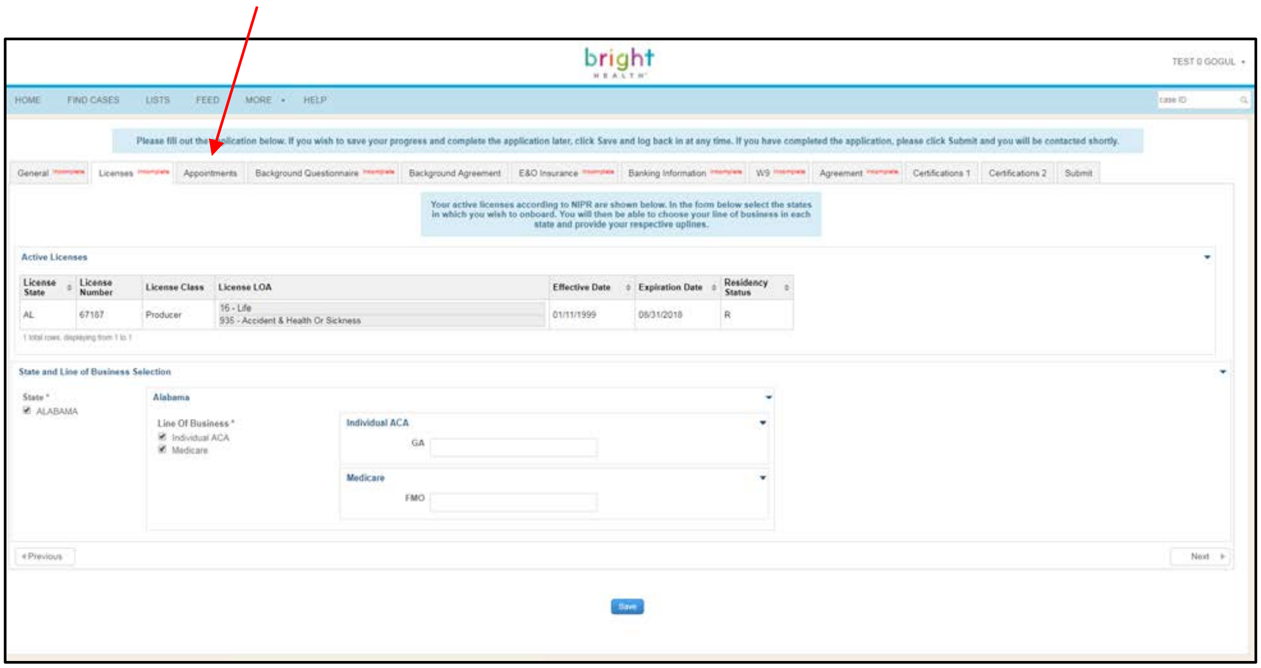
▼8 - Licenses Tab

Select the states in which you want to onboard. To select multiple states hold down the **ctrl** key while clicking the states.

Check the lines of business you wish to support.

Enter your FMOs and GAs, if relevant.

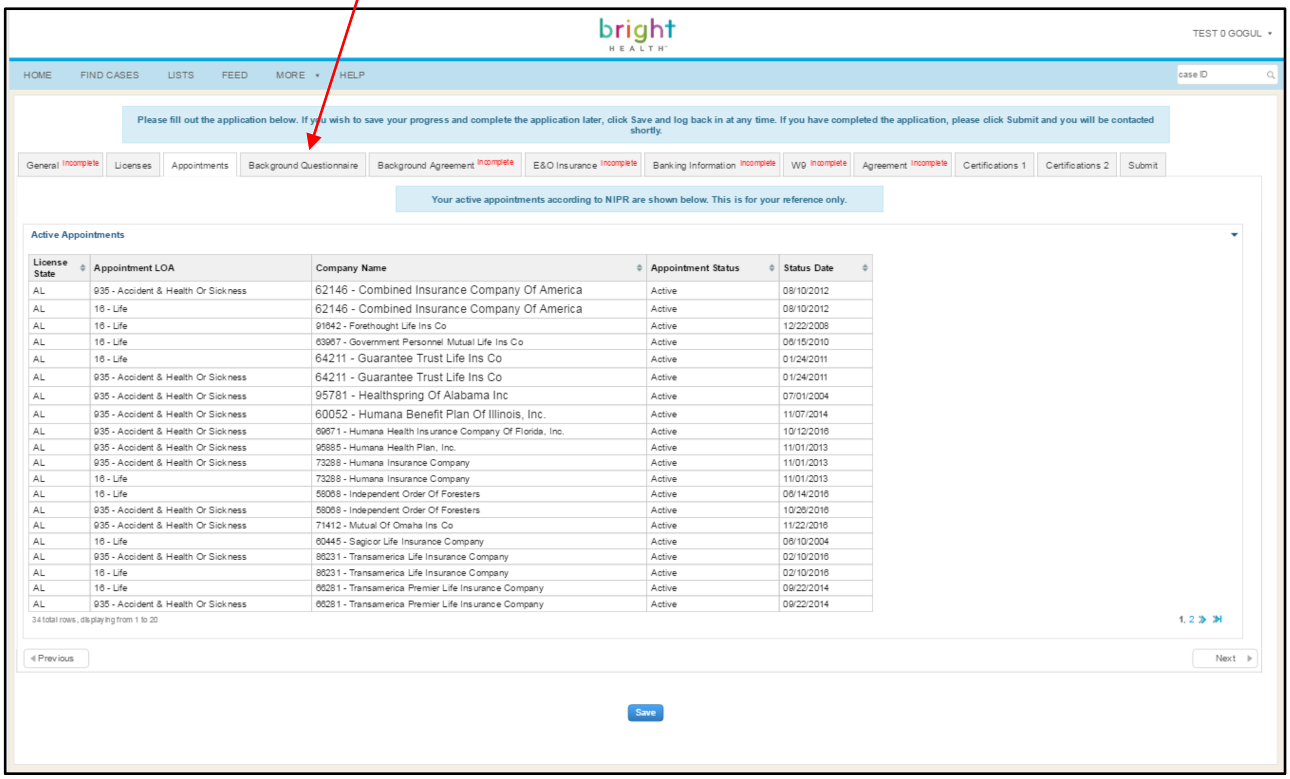
Go to the **Appointments tab**.



▼9 - Appointments Tab

If you have any existing appointments with Bright Health they will be listed here.

Go to the **Background Questionnaire tab.**

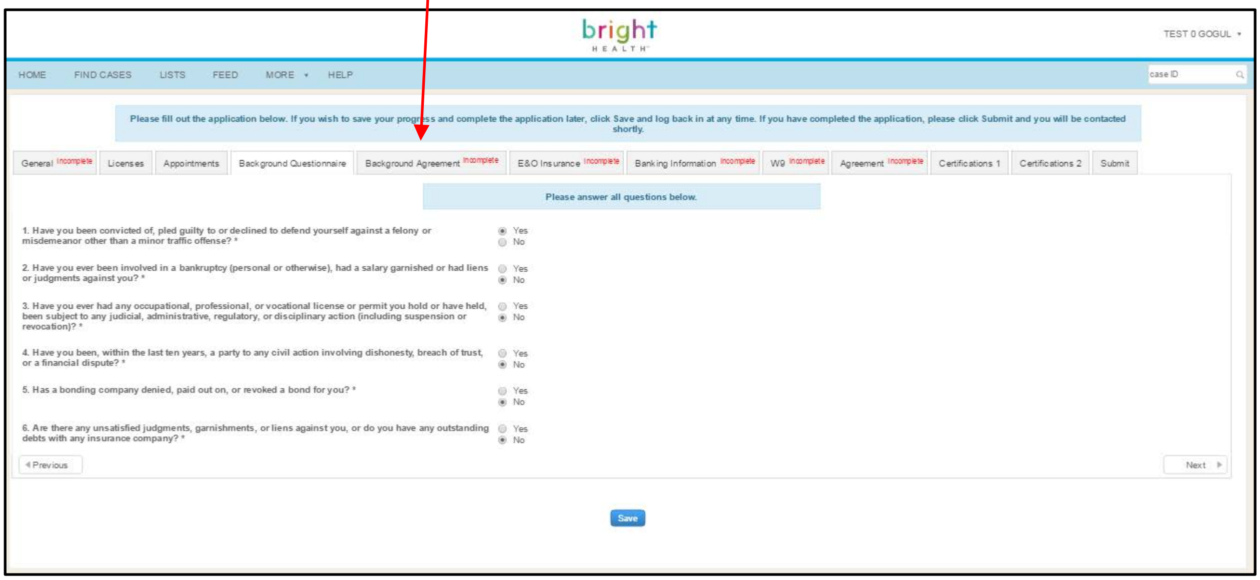


License State	Appointment LOA	Company Name	Appointment Status	Status Date
AL	935 - Accident & Health Or Sickness	62146 - Combined Insurance Company Of America	Active	08/10/2012
AL	16 - Life	62146 - Combined Insurance Company Of America	Active	08/10/2012
AL	16 - Life	91642 - Forethought Life Ins Co	Active	12/22/2008
AL	16 - Life	63967 - Government Personnel Mutual Life Ins Co	Active	06/15/2010
AL	16 - Life	64211 - Guarantee Trust Life Ins Co	Active	01/24/2011
AL	935 - Accident & Health Or Sickness	64211 - Guarantee Trust Life Ins Co	Active	01/24/2011
AL	935 - Accident & Health Or Sickness	95781 - Healthspring Of Alabama Inc	Active	07/01/2004
AL	935 - Accident & Health Or Sickness	60052 - Humana Benefit Plan Of Illinois, Inc.	Active	11/07/2014
AL	935 - Accident & Health Or Sickness	69671 - Humana Health Insurance Company Of Florida, Inc.	Active	10/12/2016
AL	935 - Accident & Health Or Sickness	95885 - Humana Health Plan, Inc.	Active	11/01/2013
AL	935 - Accident & Health Or Sickness	73288 - Humana Insurance Company	Active	11/01/2013
AL	16 - Life	73288 - Humana Insurance Company	Active	11/01/2013
AL	16 - Life	58068 - Independent Order Of Foresters	Active	06/14/2016
AL	935 - Accident & Health Or Sickness	58068 - Independent Order Of Foresters	Active	10/26/2016
AL	935 - Accident & Health Or Sickness	71412 - Mutual Of Omaha Ins Co	Active	11/22/2016
AL	16 - Life	60445 - Sagicor Life Insurance Company	Active	06/10/2004
AL	935 - Accident & Health Or Sickness	86231 - Transamerica Life Insurance Company	Active	02/10/2016
AL	16 - Life	86231 - Transamerica Life Insurance Company	Active	02/10/2016
AL	16 - Life	66281 - Transamerica Premier Life Insurance Company	Active	09/22/2014
AL	935 - Accident & Health Or Sickness	66281 - Transamerica Premier Life Insurance Company	Active	09/22/2014

▼10 - Background Questionnaire Tab

Answer all background questions, providing explanations for each “Yes” answer.

Go to the **Background Agreement tab**.



▼11 - Background Agreement Tab

Click each agreement button to open and sign each separate agreement.

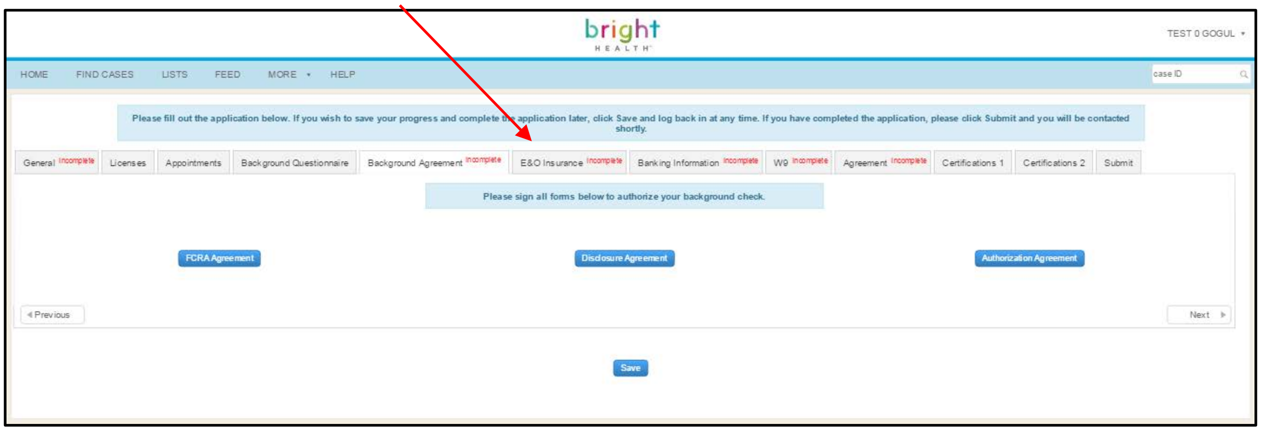
Sign each agreement using the name you listed in Step 7 on the General Tab page.

Reminder: the name you sign here must MATCH how you typed your name in Step 7 on the General tab page.

The SIGNED, DATED, and IP ADDRESS fields will become populated after the "Sign" button is clicked.

You will be asked to sign the Disclosure Form for the background check information. Click **Sign tab** after you have entered your full name.

You will then be taken back to the main screen.
Go to the **E&O Insurance tab.**



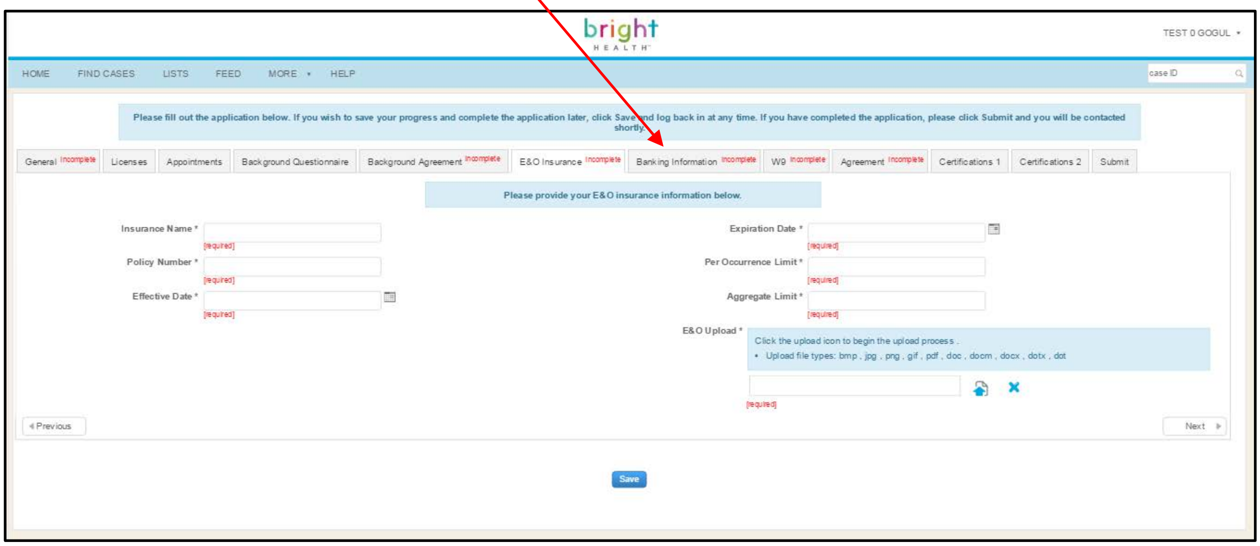
▼12 – Errors & Omissions Insurance Tab

Provide all required E&O insurance information and upload a copy of your certification.

The effective date must be in the past, and the expiration date must be in the future.

Both per occurrence limit and aggregate limit must be at least $1,000,000.

Go to the **Banking Information tab.**



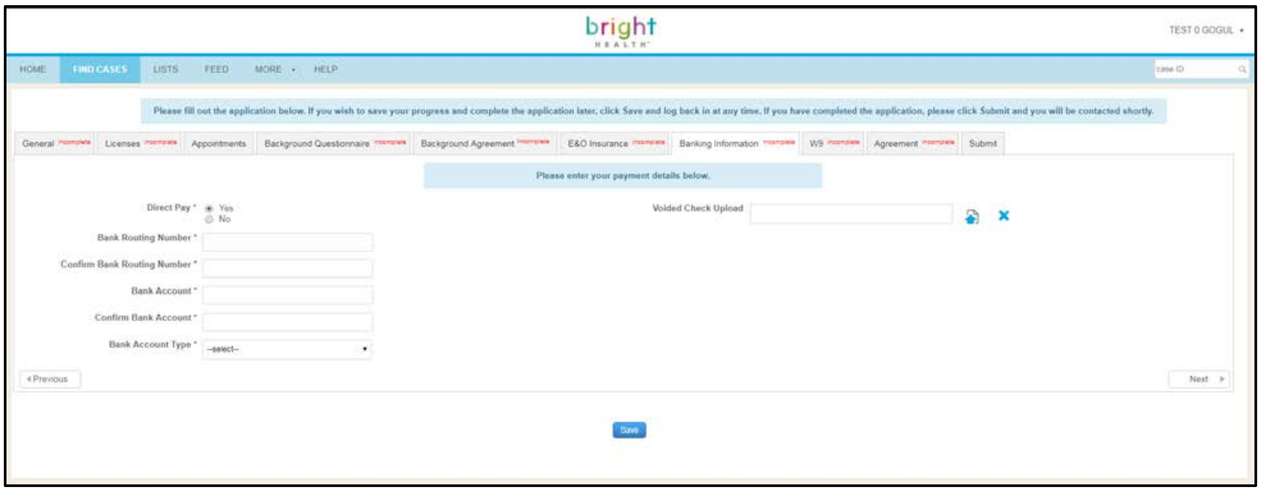
▼13 - Banking Information Tab

If you are commissionable, check **YES** to direct pay. If **NO**, you will need to enter the Tax ID of your associated agency.

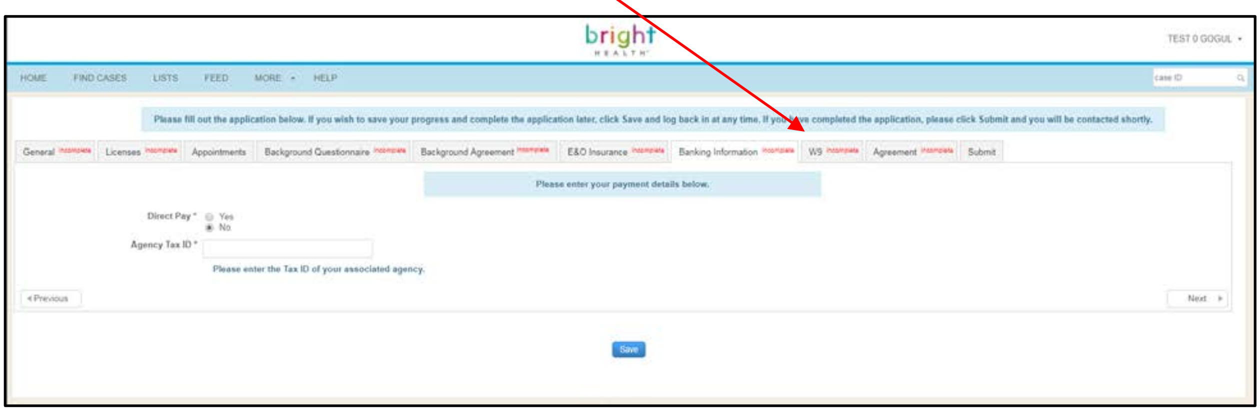
If you are commissionable, you will be required to enter all relevant banking information.

Bank routing and account numbers will need to be entered twice to confirm they are correct.

It is advised that you upload a scanned image of a voided check, though this is not required.



Once complete, go to the **W9 tab.**



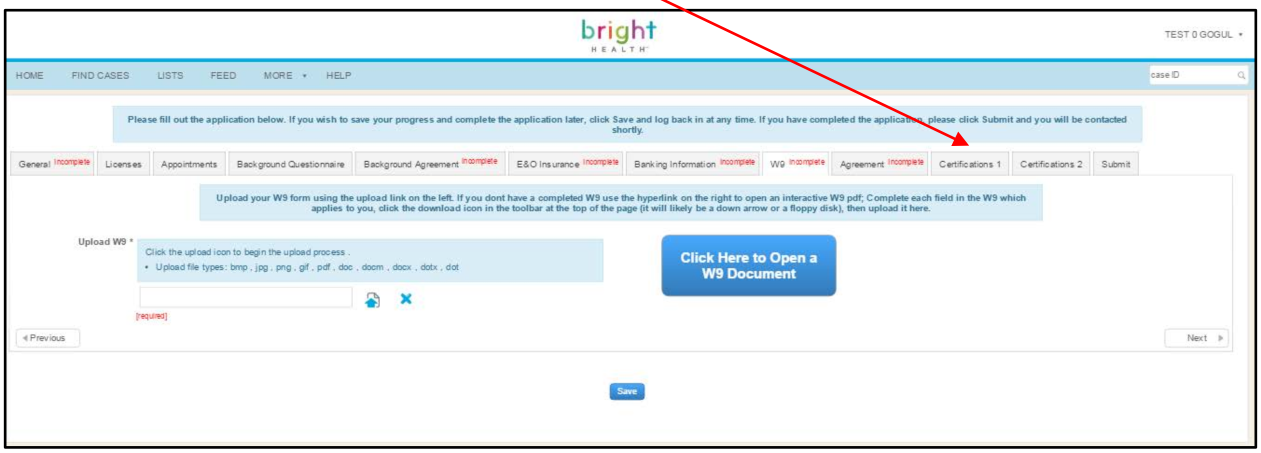
▼14 - W9 Tab

If you have a complete W9 in PDF form upload it using the **Upload W9 input field**.

If you do not have a complete W9, click the **Click Here to Open a W9 Document** button to open an interactive W9 PDF.

Complete the W9, download it, then upload it using the Upload W9 input field. Click the **Save button**.

Proceed to the **Certifications 1 tab**.



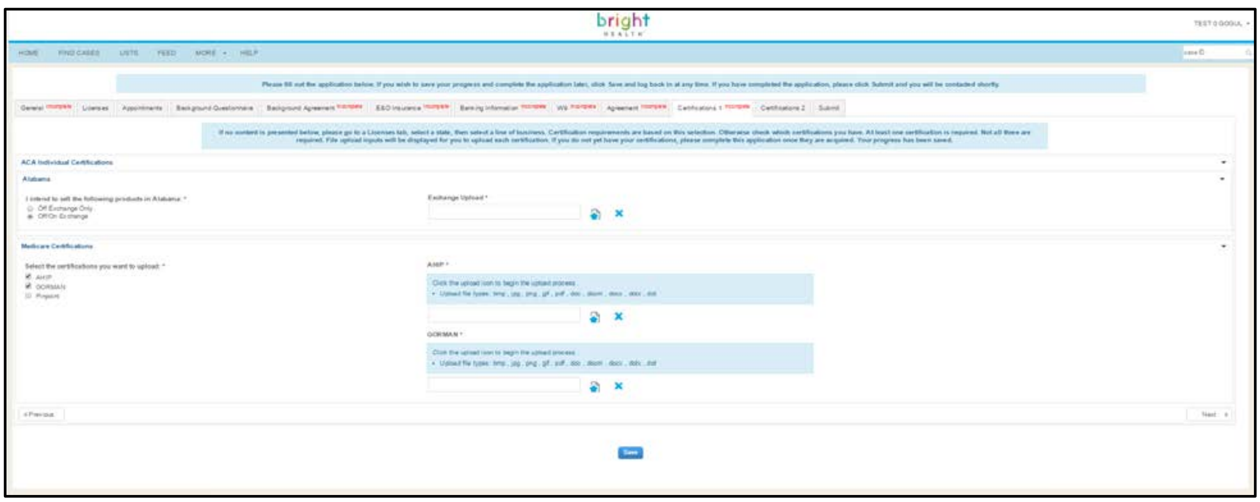
▼15 - Certifications 1 Tab –

Check the boxes corresponding to the certification(s) you have completed to display the upload input(s). Certifications 1 tab is where you upload your certifications for the upcoming plan year.

Individual Agents – If FFM state, please upload your FFM certification and proceed to the Agreement tab (**Step 17**.) If this does not apply to you, go to the **Agreement tab**.

Medicare Agents – please upload your AHIP, Gorman or Pinpoint certification. Proceed to the Agreement tab (**Step 17**). You will receive an email from Bright Health once the Certifications 2 tab is available.

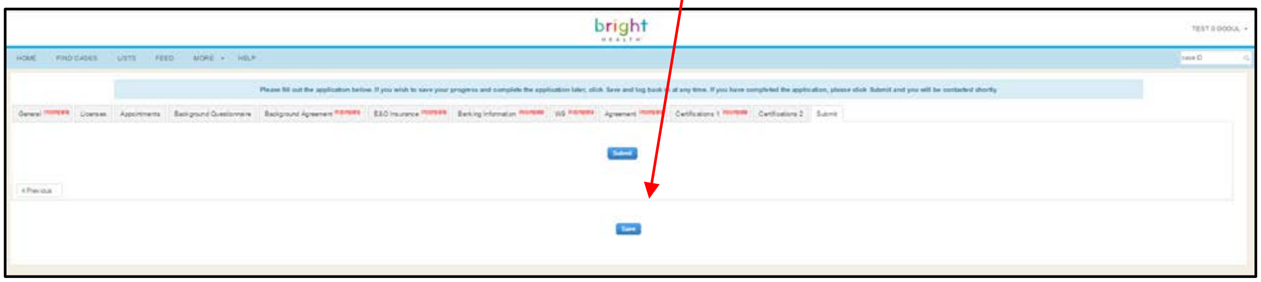
NOTE: If you do not upload your certifications, you will not be able to submit your application for completion. Your progress will be saved and you will need to return to this screen once your certifications have been completed.



▼16 - Certifications 2 Tab – Medicare Only

You will receive an email from Bright Health once Medicare Certification is available. Once open, return to the Certifications 2 tab and complete the Bright Health product training.

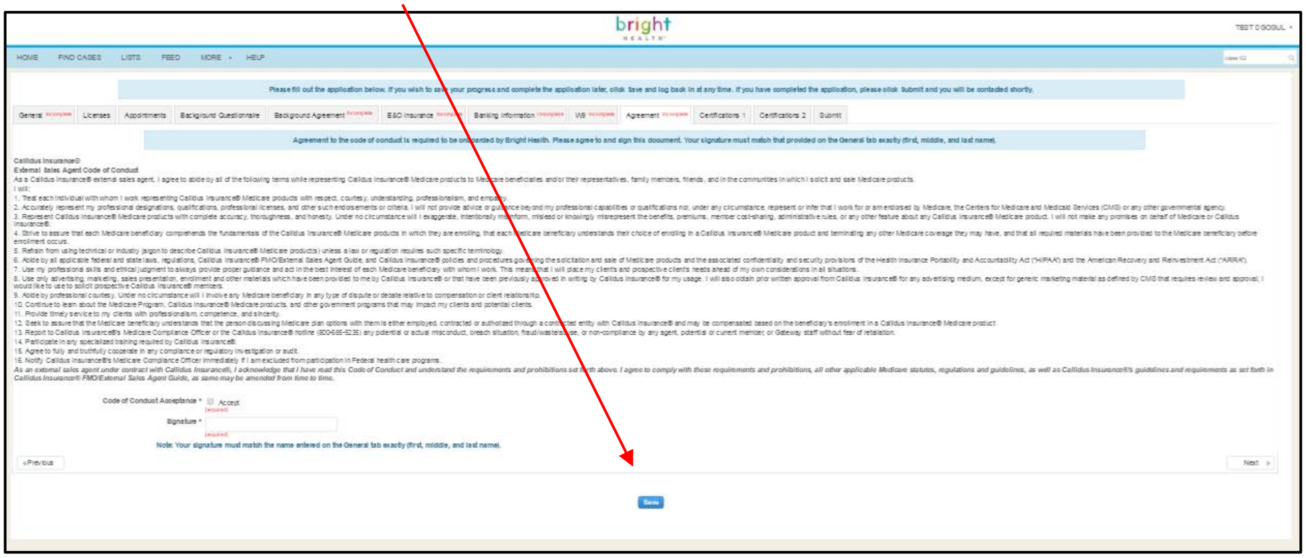
When finished with Certifications 2 tab, click **save**.



▼17 - Agreement Tab

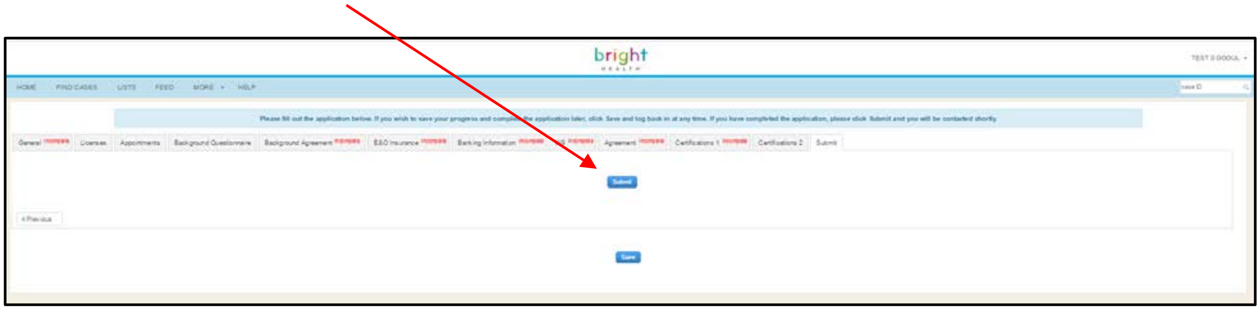
Read the code of conduct, check the code of conduct acceptance box, and type your full name as you did in **Section 7 on the General Tab** page.

Click the **Save button.**

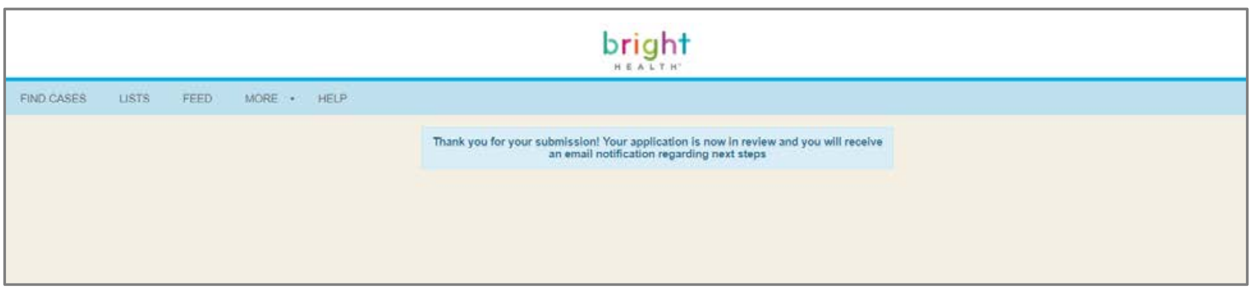


18 - Submit Tab

Click the **Submit button**.



19 - Success Page



20 – Other Email Notifications

You also will receive additional emails as part of the appointment/credentialing process, including:

1. When your appointment application is approved.
2. If your appointment application requires more information to be completed.
3. If you've saved your application process in one of the steps and have not returned to complete it for a certain period-of-time.
4. If your appointment application has been denied.