BCBS Paper Application AOR Information:

For the Agent of Record information on BCBS PDF Applications, you will fill in the following information and add the correct Agent ID based upon customer's state of enrollment:

Use for HealthSherpa Off-Exchange Apps:	**Use for BCBS PDF Applications:**
Texas – 902428 Illinois – 2822386 New Mexico – 2822386 Montana – 300213786 Oklahoma - 68369	Texas – 107891998 Illinois - 107891996 New Mexico - 107971127 Montana - 107901338 Oklahoma - 107891997

- **Agent Signature:** Joseph Talarico Esign
- **Agent's Printed Name:** Joseph Talarico
- **Agent ID: (**see above chart)
- **Agent's Phone:** 817-778-8759
- **Agent's Email:** Joe.Talarico@healthguys.com

RingCentral Dispositions:

- **Sold** - submitted an application
- **Quoted** - emailed a proposed plan (keep it to 1 or 2 plans only)
- **Needs Follow-up** - something is needed before enrolling, such as SEP docs
- **Ineligible** - no way we can sell them (Medicaid, invalid citizenship status, etc.)
- **Open Enrollment** - Need to wait until the next OEP
- **Medicaid –** customer needs support for Medicaid plan
- **Medicare –** customer needing coverage over 65
- **Group –** customer is asking about only a group plan (existing or new)
- **Service –** customer needs help with claims, ID cards, change PCP, etc. - use sparingly

- **No Answer** - (outbound) call just rings forever
- **Voicemail** - (outbound) left a GOOD message to call you back
- **Bad Number** - (outbound) number doesn't work
- **Completed** - (tasks manager) you completed the task

Enrollment Pathways by Carrier and Lead Type for ACA

- **BCBS Telesales** -White Label showing BCBS only plans HealthSherpa (inmot email address)
- **David Lance/Referral** - Referral ONLY for BCBS, Cigna, Oscar and Anthem BCBS (Agency NPN)
- **BSW Referral** - Referral ONLY for Molina, UHC and Ambetter (Agent NPN)
- **Get Covered Illinois Telesales and Referral** - tax credit eligible customers
- **Off-Exchange Enrollments** – HealthSherpa no tax credit off-exchange (electronic) or PDF app.
- **BCBS Dental Only Telesales** - PDF application found on HealthGuys Agent website