

Roles & Responsibilities

Timeline	Sales Representative, unless noted	Broker	Employer
6 months (180 days) before renewal	Identify leads	Identify leads and notify sales representative of interested parties. Review product collateral with identified leads.	Work with broker/sales representative to review Your Blue Shop product offerings.
3 months (90 days) before renewal	<p>Sales Representative: Request accelerated quote from Underwriting, secure sales agreement/rate acceptance form, 3 way agreement (as applicable), CDH agreement (as applicable), check (if new business) from broker/group, and verify all necessary information is included.</p> <p>Account Manager: Coordinate with sales representative to aid in getting completed Web Enrollment Authorization form in house for processing, and ensuring all group users have been granted access to BCBSRI.com.</p> <p>Deliver accelerated rate quote and renewal to broker/group.</p> <p>Manage rate and renewal information and secure decision from broker/group.</p>	<p>Secure sales agreement/rate acceptance form, census template, 3 way agreement, web enrollment authorization form, CDH agreement (as applicable) and check (if new business) from group and forward to sales representative.</p> <p>Complete broker portion of web enrollment authorization form if administering enrollment on behalf of group, and complete supplemental form for broker administrative staff to administer enrollment (as applicable).</p> <p>*Complete broker section of 3 way agreement. Set expectations with account regarding need to submit enrollment activity to BCBSRI for a date that is prior to an account's Your Blue Shop enrollment effective date via paper or CSV file once sales agreement/rate acceptance form is submitted.</p> <p>Deliver rate quote and renewal to account.</p> <p>Follow up with sales representative on account decision.</p>	<p>Complete sales agreement/rate acceptance form, census template, 3 way agreement (as applicable), web enrollment authorization form, and CDH agreement (as applicable), and BAU work with broker/sales representative to initiate account setup.</p> <p>Submit completed documentation and check (if new business) to broker/sales representative. Set expectations with employees regarding completion of enrollment process via Your Blue Shop, our secure online marketplace.</p> <p>Evaluate quote and renewal information.</p> <p>Make product elections for exchange enrollment.</p>
2 months (60 days) before renewal	Submit PAR form, and forward sales agreement/rate acceptance form, census template, 3 way agreement (as applicable), web enrollment authorization form, CDH agreement (as applicable), and check (if new business) to Account Implementation for processing.	Work with sales representative and account as needed to address any questions that arise during group setup process.	
30 days prior to renewal effective date	Account Manager: Conduct enrollment administration training for group.		

*Sales to verify this step is completed