Blue Cross Blue Shield Blue Care Network of Michigan

CALLIDUS SOFTWARE

Sales Compensation System

Agency Reps Job Aid

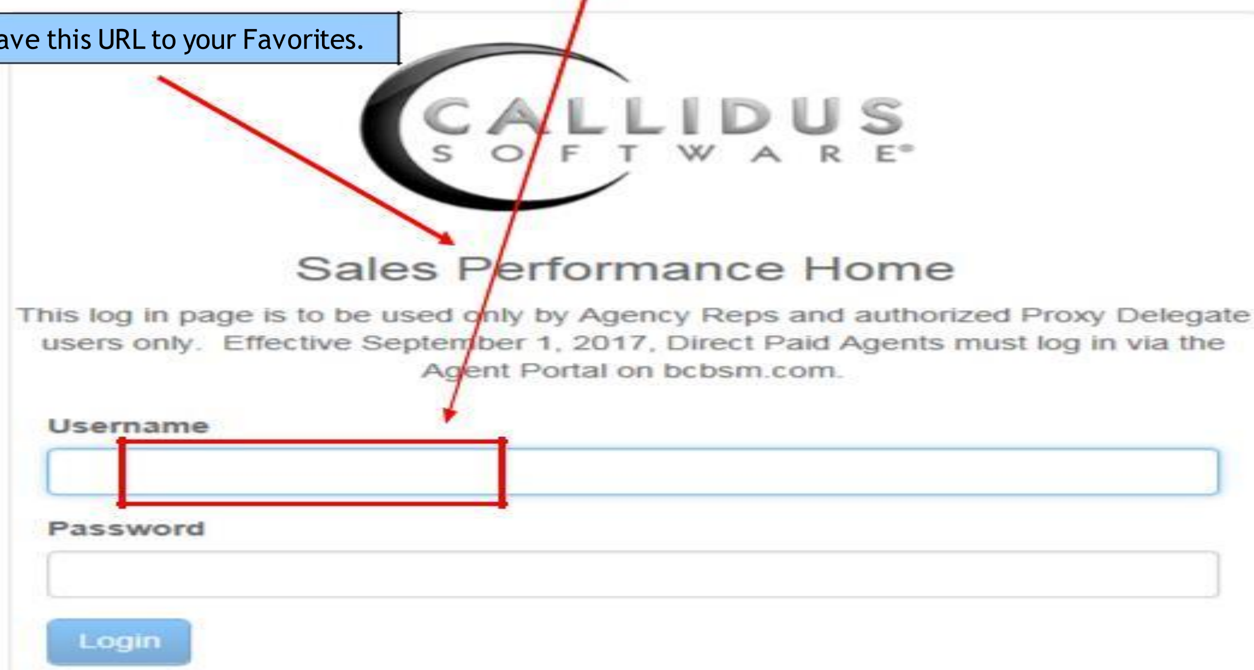
Table of Contents

1 Logging on to Callidus

1. Navigate to https://bbmi-prd.callidusondemand.com/SalesPortal/#!/

2. On the homepage, enter your Callidus user name and password and click **"Login."**

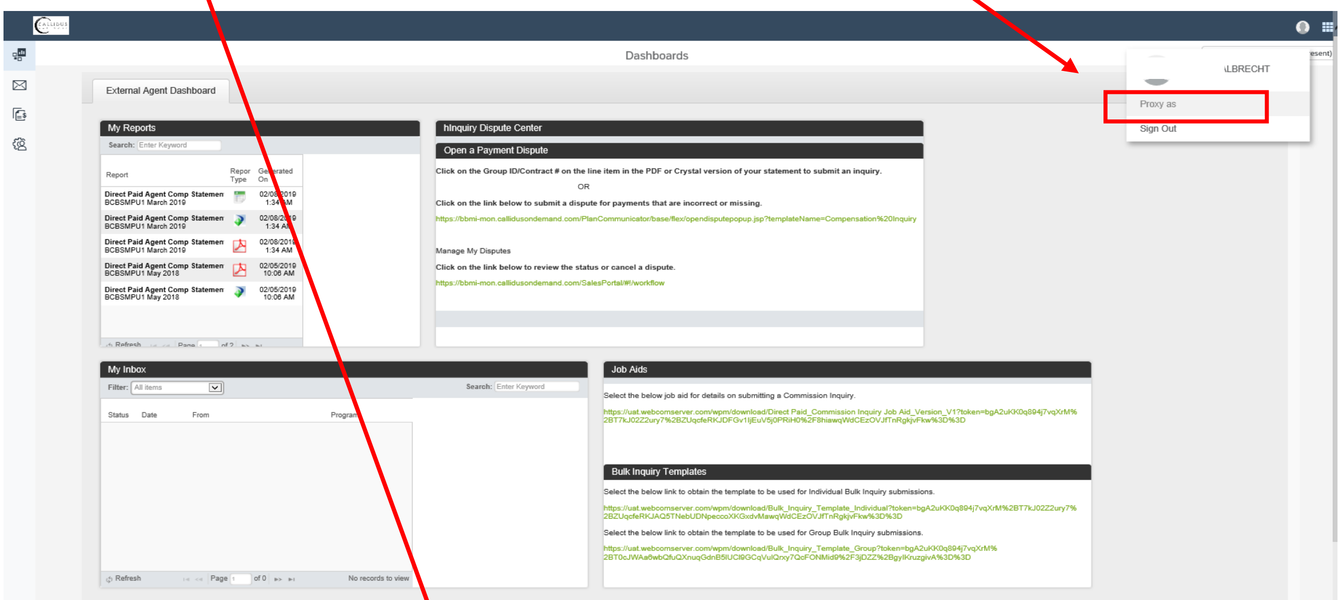
Tip: Save this URL to your Favorites.

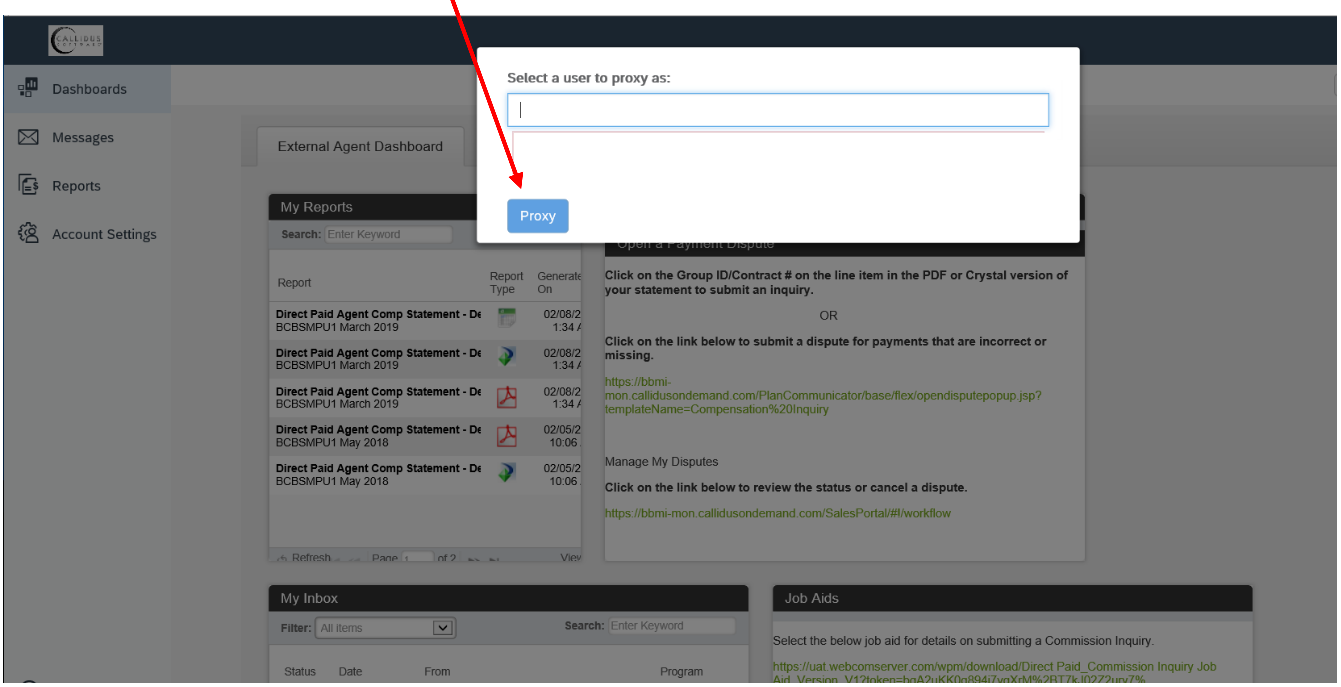


2 Commission Inquiry Form

3. If you are not a primary user, you must complete steps a and b below to access reports. If you are a primary user, please skip to step 2.

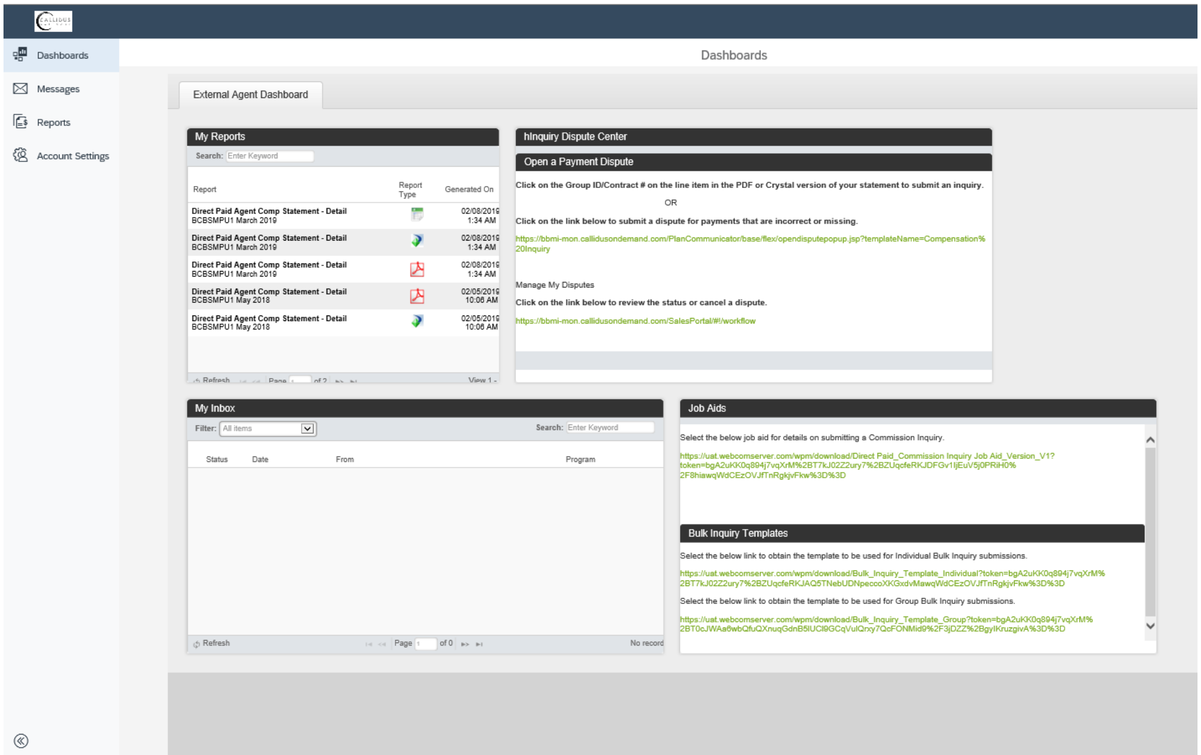
   a) Open the profile drop-down menu. Click on ***Proxy as*** and enter few characters of the name to connect.
   b) Click ***"Proxy"*** on the proxy window after confirming the primary user name in the new proxy window.



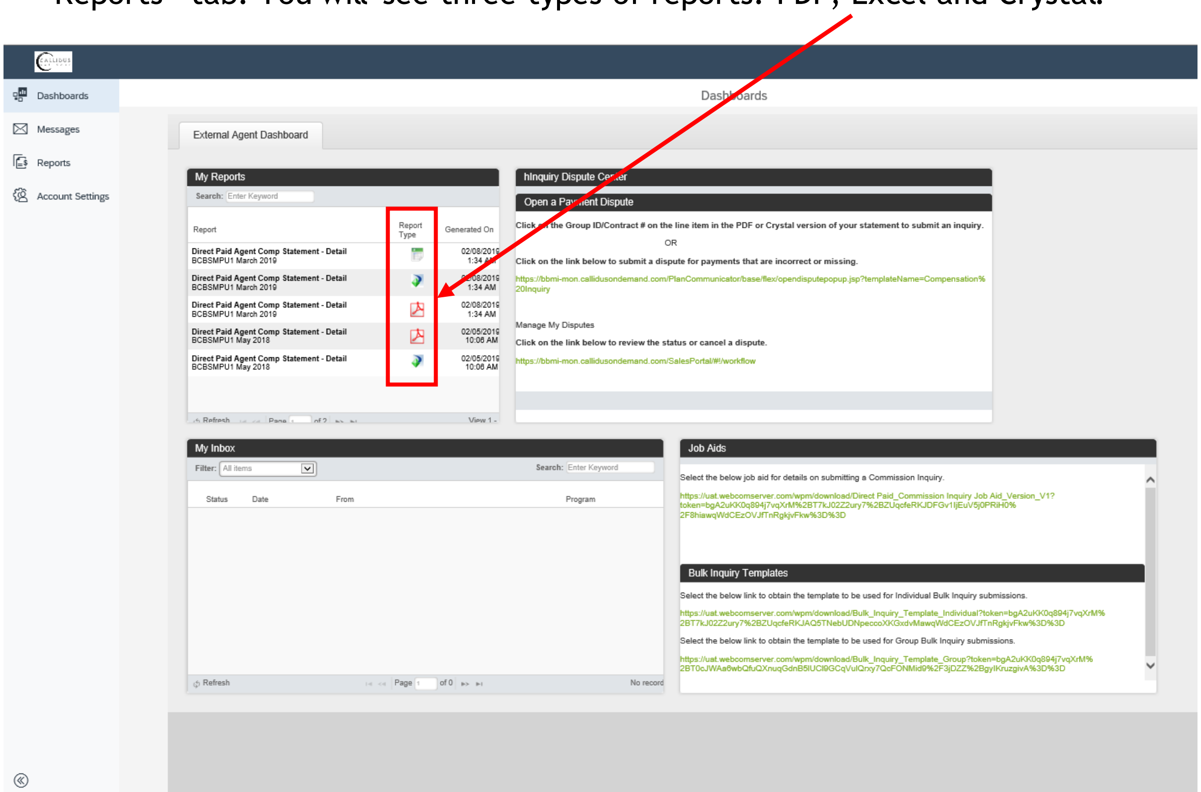


Commission Inquiry Form, *continued*

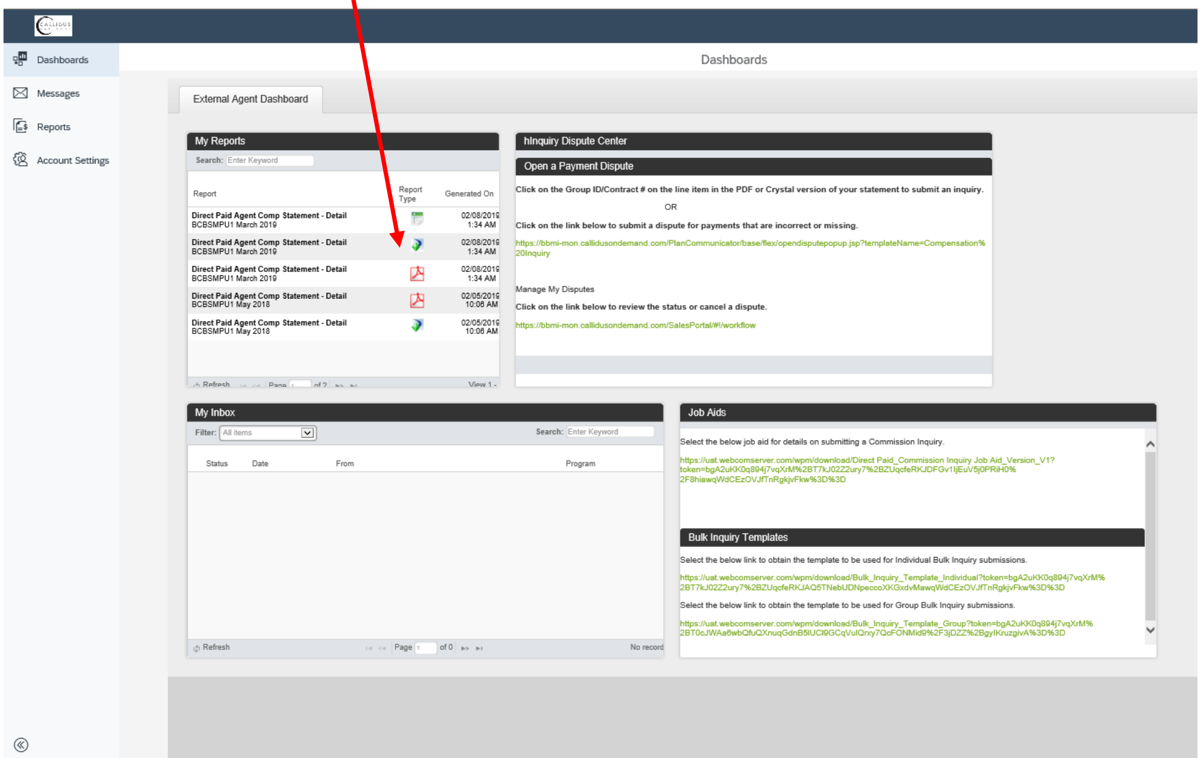
4. You will be at the **Sales Performance Home Page.**



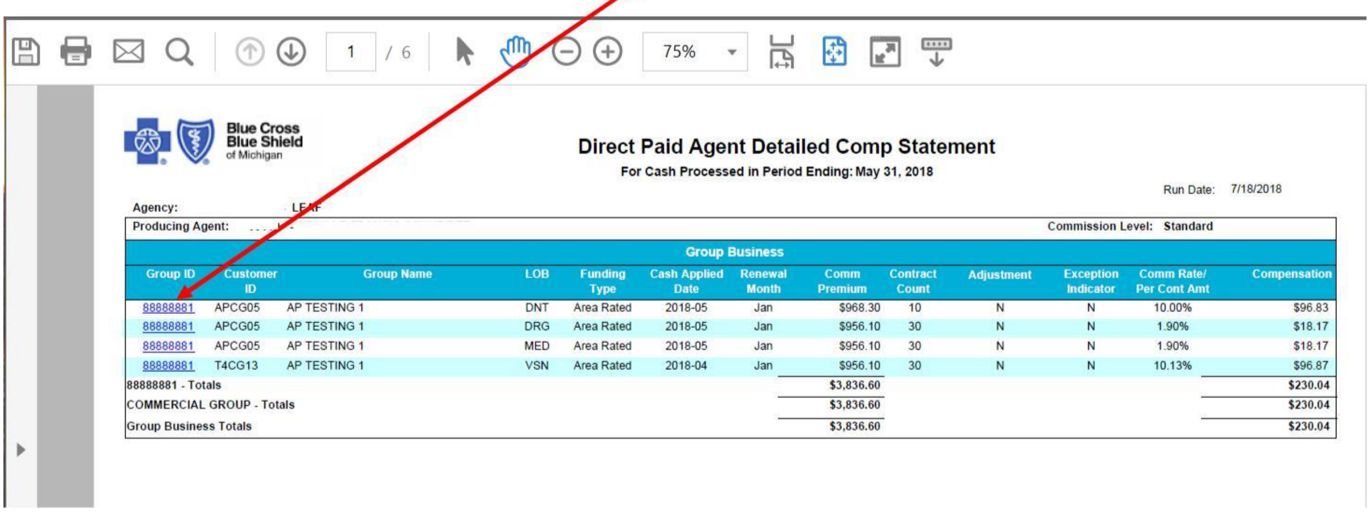
5. In the Sales Performance Home page, recently generated reports are listed under the "My Reports" tab. You will see three types of reports: PDF, Excel and Crystal.



6. Click on the PDF or Crystal format to submit an inquiry dispute for payments that are incorrect or missing.



7. Once the PDF or Crystal statement is open, click on Group ID/Contract # of the line item that you would like to submit a payment dispute.



Blue Cross Blue Shield of Michigan

Direct Paid Agent Detailed Comp Statement

For Cash Processed in Period Ending: May 31, 2018

Run Date: 7/18/2018

Agency: LEAF

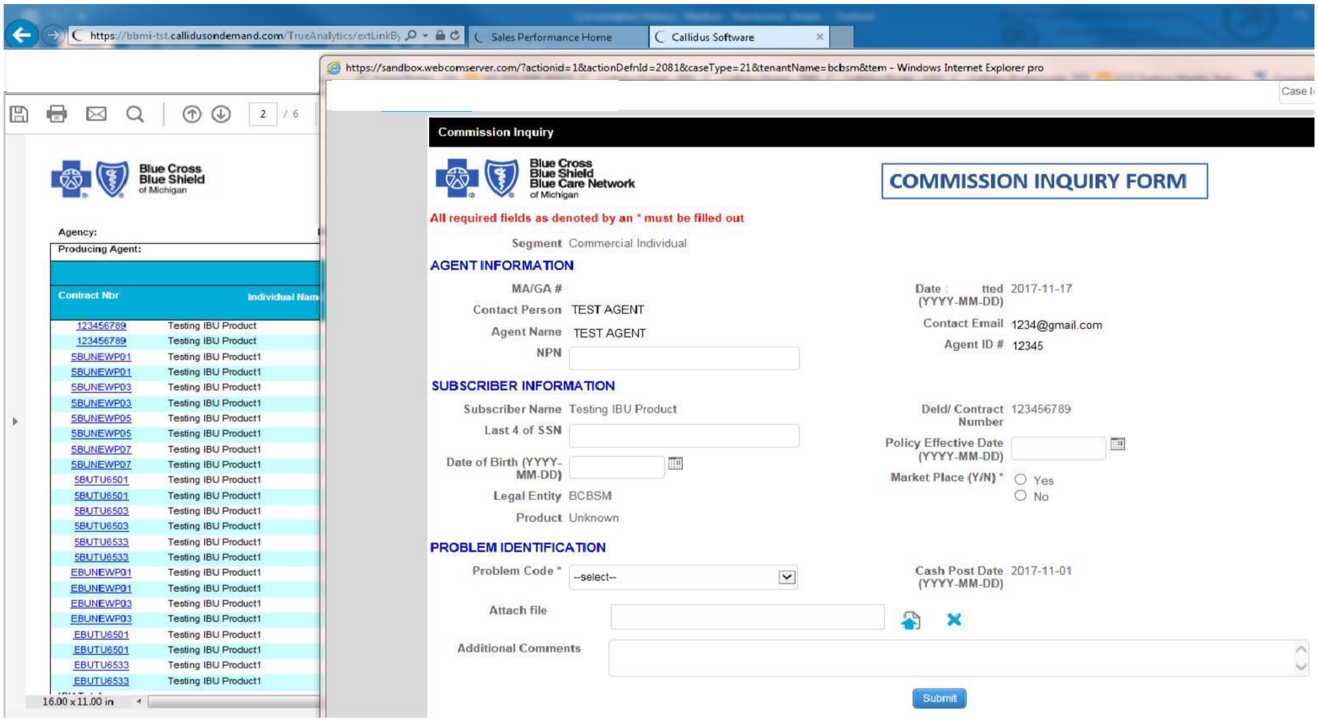
Producing Agent:

Commission Level: Standard

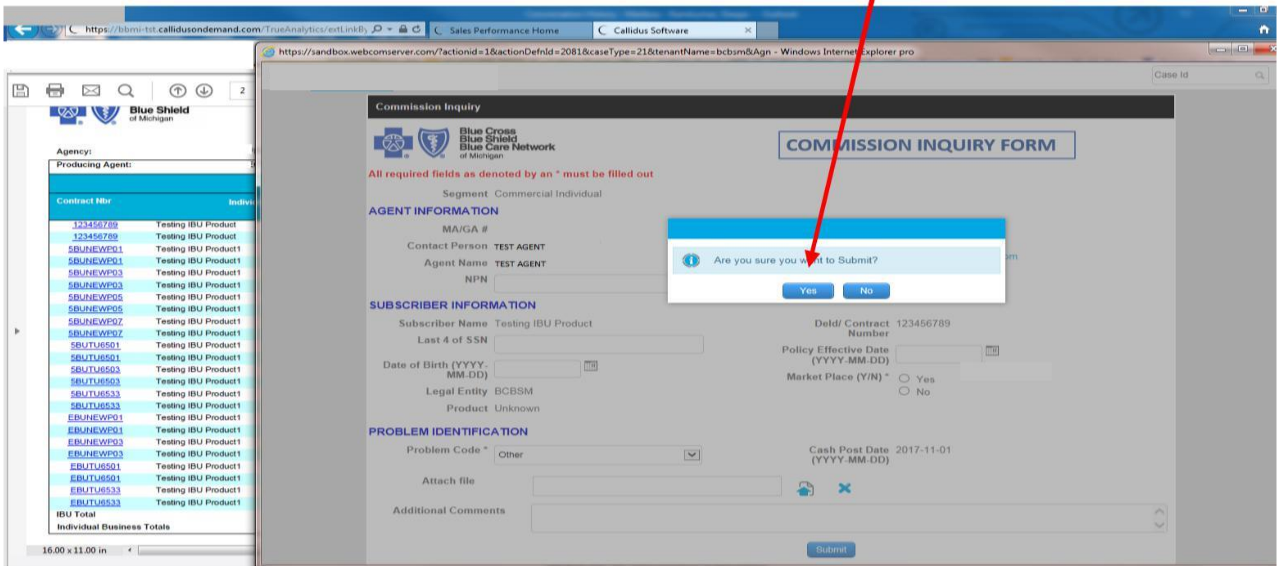
Group Business

Group ID	Customer ID	Group Name	LOB	Funding Type	Cash Applied Date	Renewal Month	Comm Premium	Contract Count	Adjustment	Exception Indicator	Comm Rate/ Per Cont Amt	Compensation
88888881	APCG05	AP TESTING 1	DNT	Area Rated	2018-05	Jan	$968.30	10	N	N	10.00%	$96.83
88888881	APCG05	AP TESTING 1	DRG	Area Rated	2018-05	Jan	$956.10	30	N	N	1.90%	$18.17
88888881	APCG05	AP TESTING 1	MED	Area Rated	2018-05	Jan	$956.10	30	N	N	1.90%	$18.17
88888881	T4CG13	AP TESTING 1	VSN	Area Rated	2018-04	Jan	$956.10	30	N	N	10.13%	$96.87
88888881 - Totals							$3,836.60					$230.04
COMMERCIAL GROUP - Totals							$3,836.60					$230.04
Group Business Totals							$3,836.60					$230.04

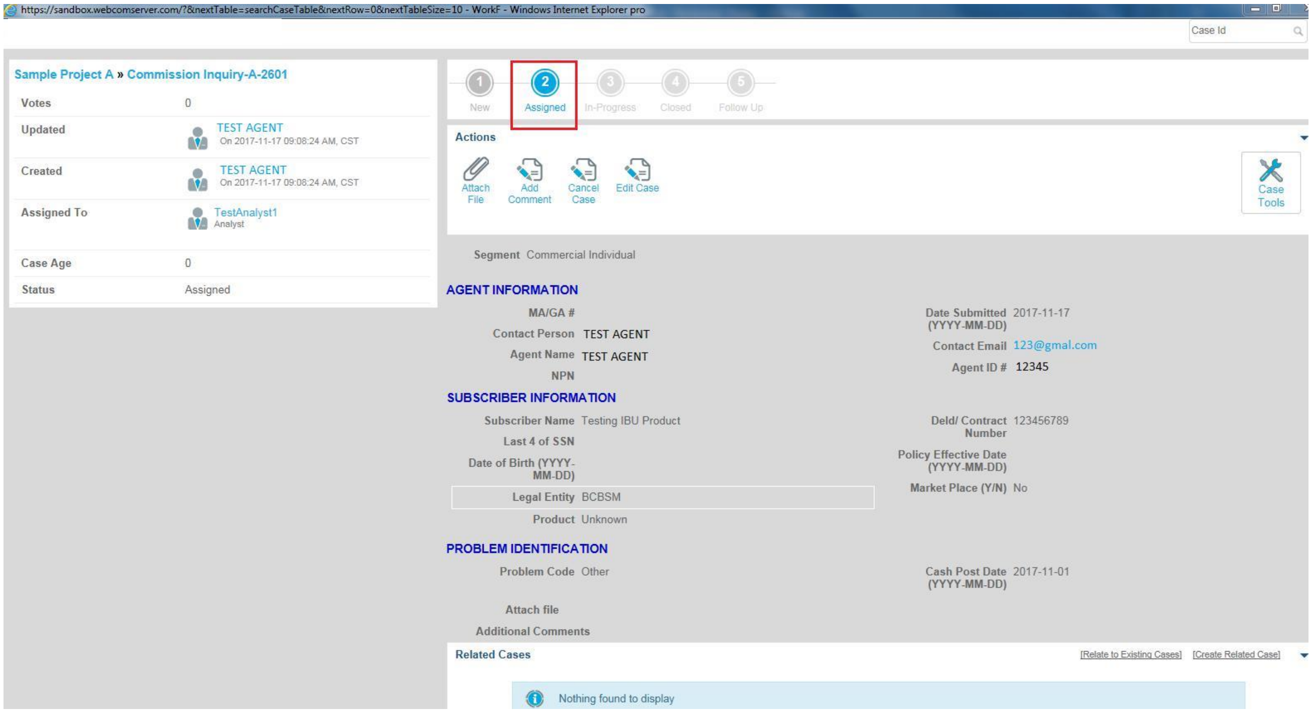
8. Depending on the segment selected, certain fields are auto populated from the statements into the inquiry form and they are non-editable.
9. Depending on the segment selected, certain additional fields are required to be completed in order to submit the form. An error message will be displayed if all required fields are not filled in. All fields denoted by an * are required.
10. Click the submit button on the bottom of the form to submit the inquiry.



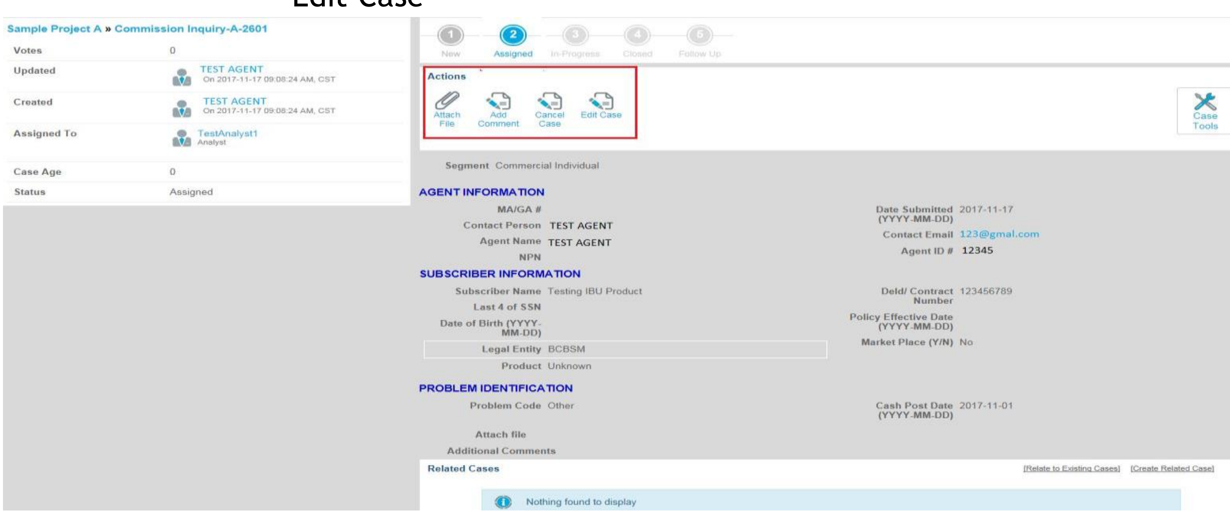
11. Upon selecting submit, a pop up box will appear. Click Yes to submit an Inquiry or click No to modify the form.



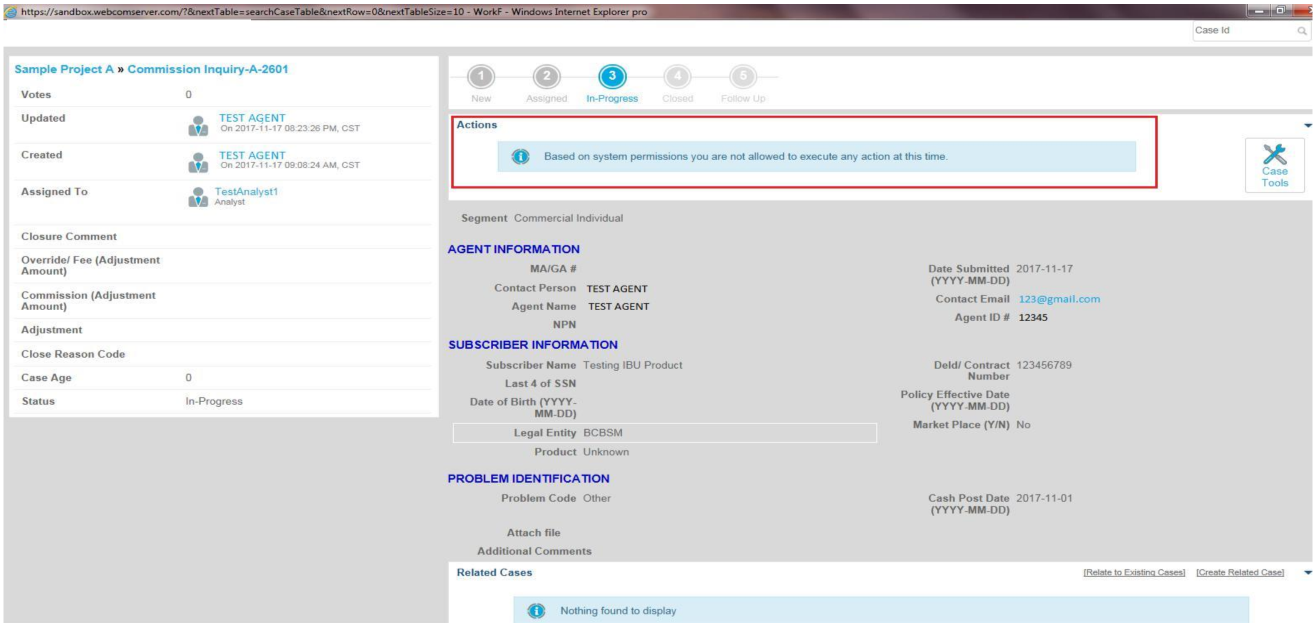
12. Upon successfully submitting the form, the case will be moved to "Assigned" status. You will then be navigated to the case detail page. You will receive an email with a system generated inquiry # that will be your confirmation that your inquiry has been successfully submitted and received.



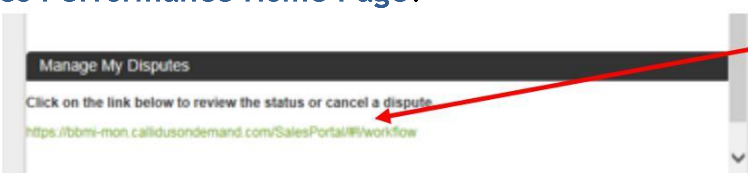
13. The case detail page will show the status of the inquiry. If the case is showing in "Assigned" status, you will still have ability to perform the following 4 actions:
    - Attach File
    - Add Comment
    - Cancel Case
    - Edit Case



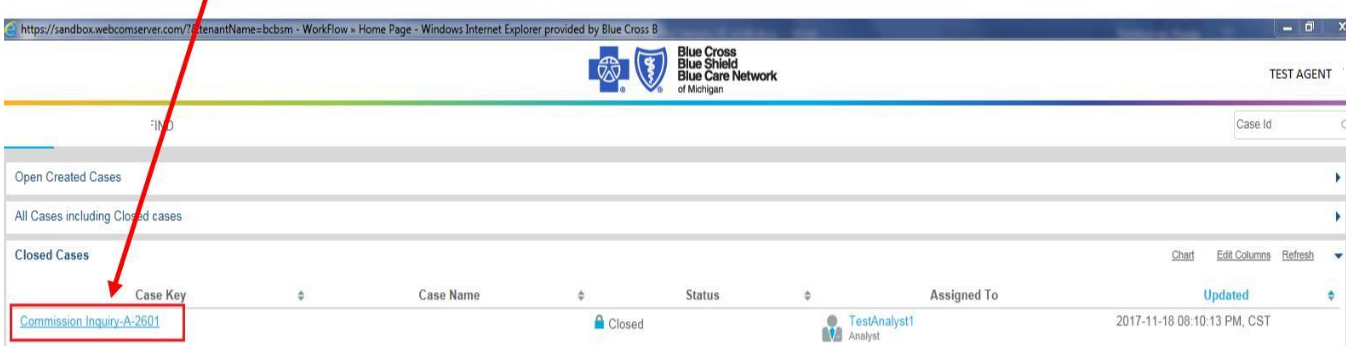
14. Once the case is showing “In Progress”, you will be prohibited from performing any actions. Please see the example below:



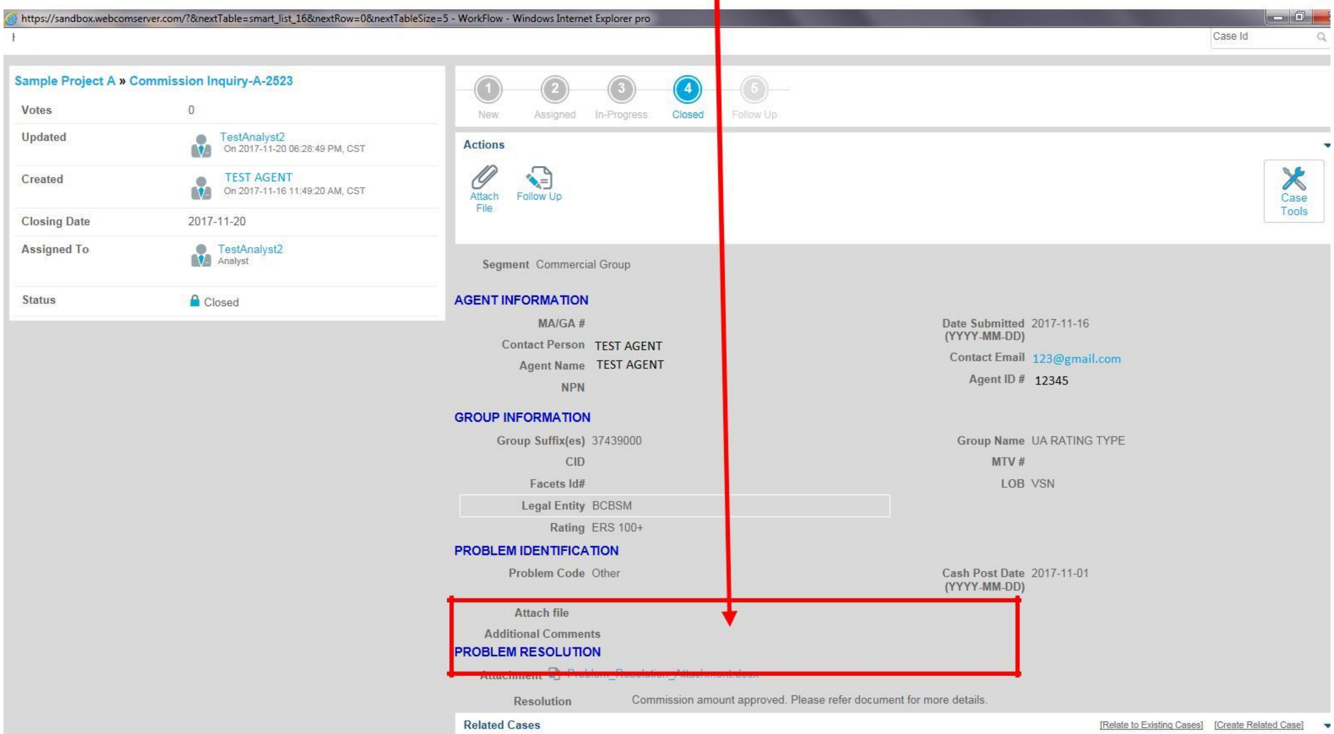
15. After the case has been resolved by the Analyst, it will be moved to a “Closed” status and a notification will be sent to your email. If you are not seeing an email, please check your SPAM folder. You will be able to view the closed case by clicking the link within this email that will then navigate to www.bcbsm.com. You will then need to repeat steps 1 through 4 in this document. Click on the link provided under ‘Manage My Disputes’ on the **Sales Performance Home Page**.



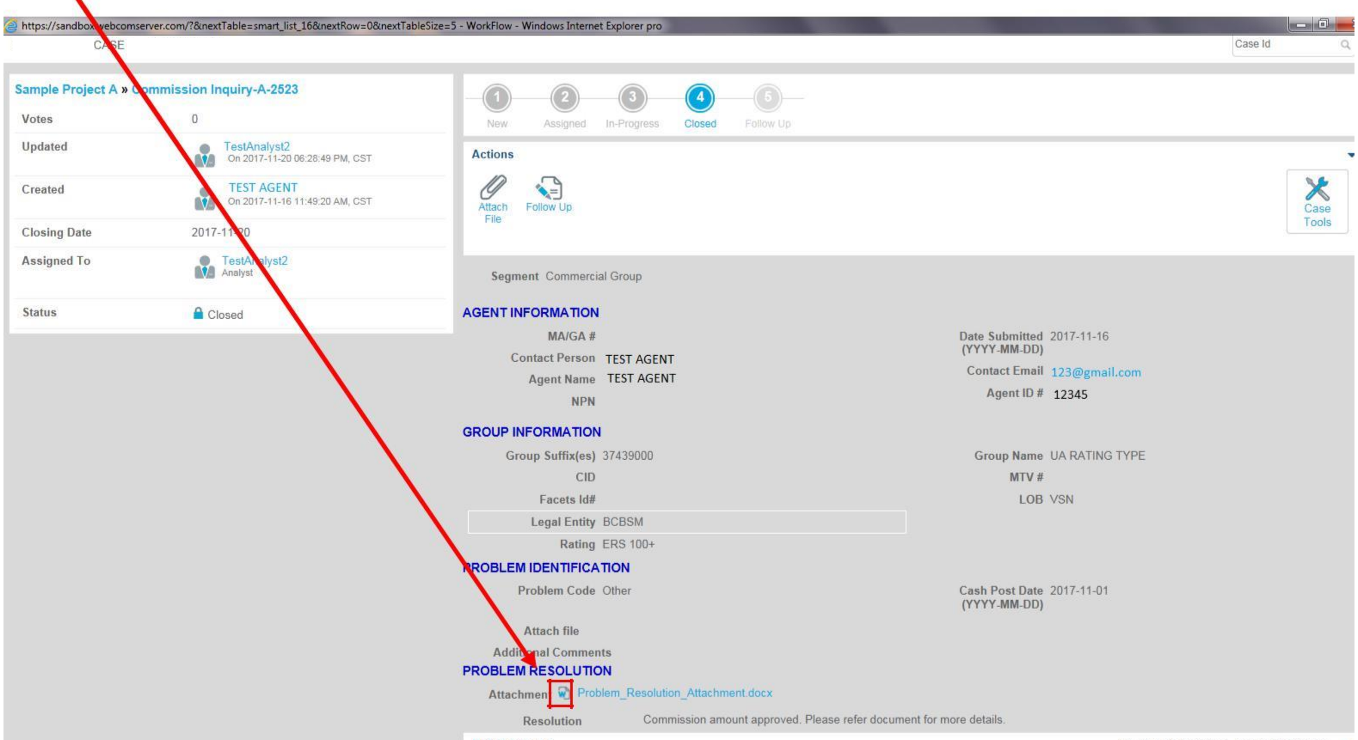
16. Once you select “Closed Cases”, you will then be able to review all closed inquiries. Under “Case Key”, you will have the option to select the Inquiry # received in the email notification for the inquiry dispute you wish to review the resolution details for.



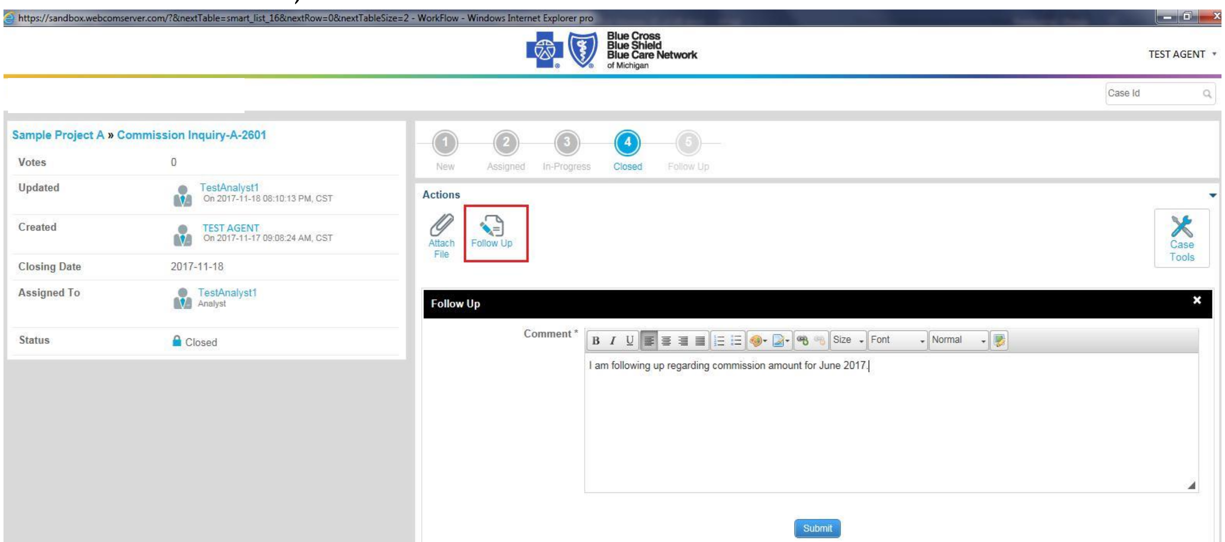
17. The investigation results can be found in the “Problem Resolution” section.



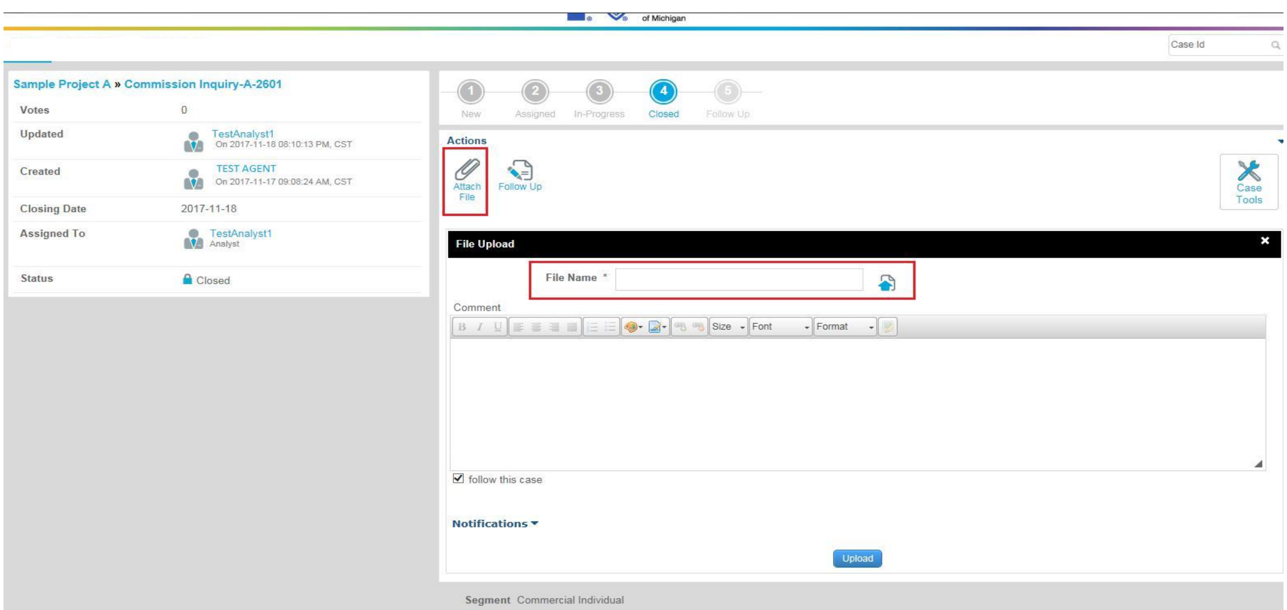
18. If there is an attachment included with the Problem Resolution, please click on the ( ) to view the attachment.



19. If you disagree with the resolution to an inquiry, you have 60 days from the date your inquiry was closed to submit a follow up by selecting one of the following:
    - Follow Up (This option needs to be selected if you are NOT including a attachment)

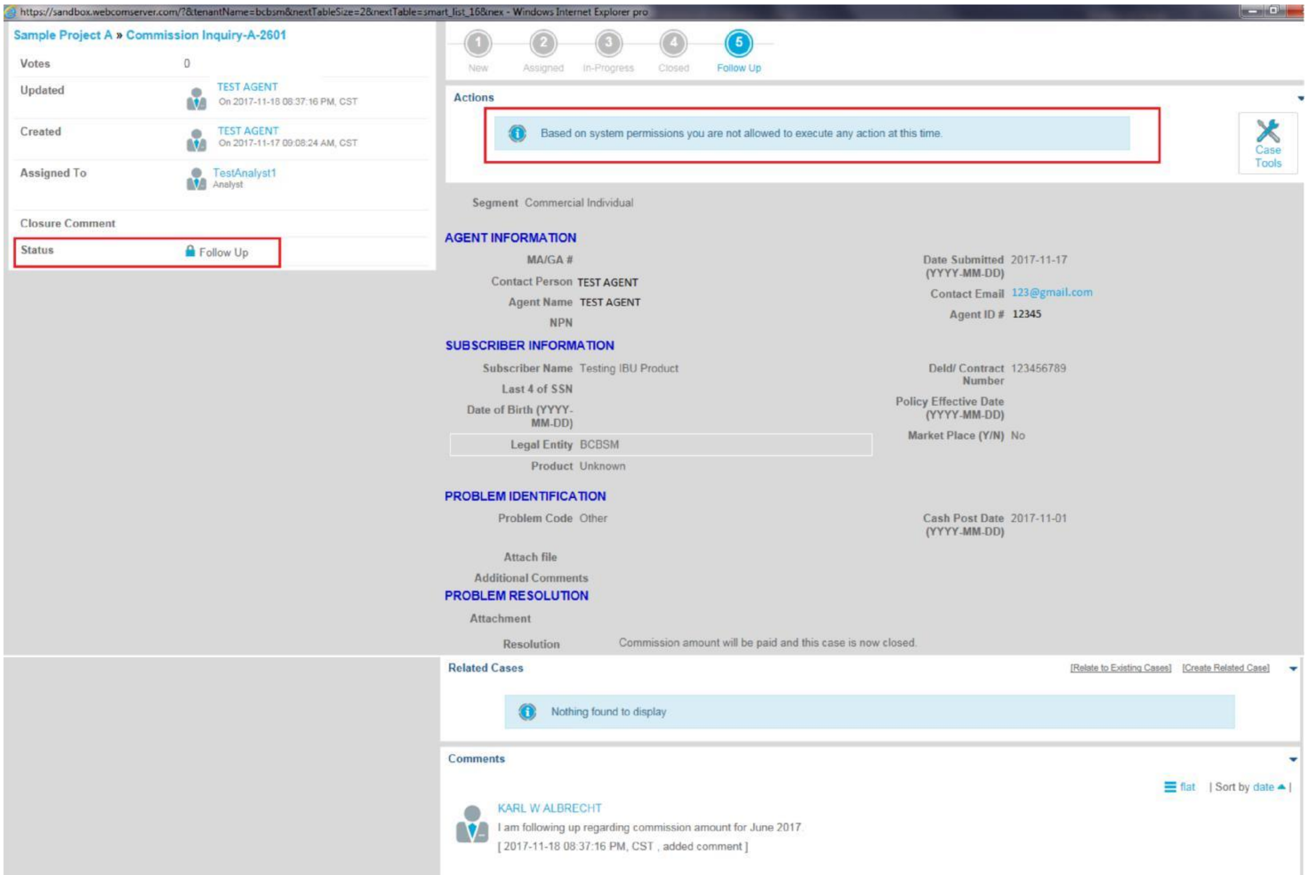


- Attach File (This option needs to be selected if you are including an attachment)



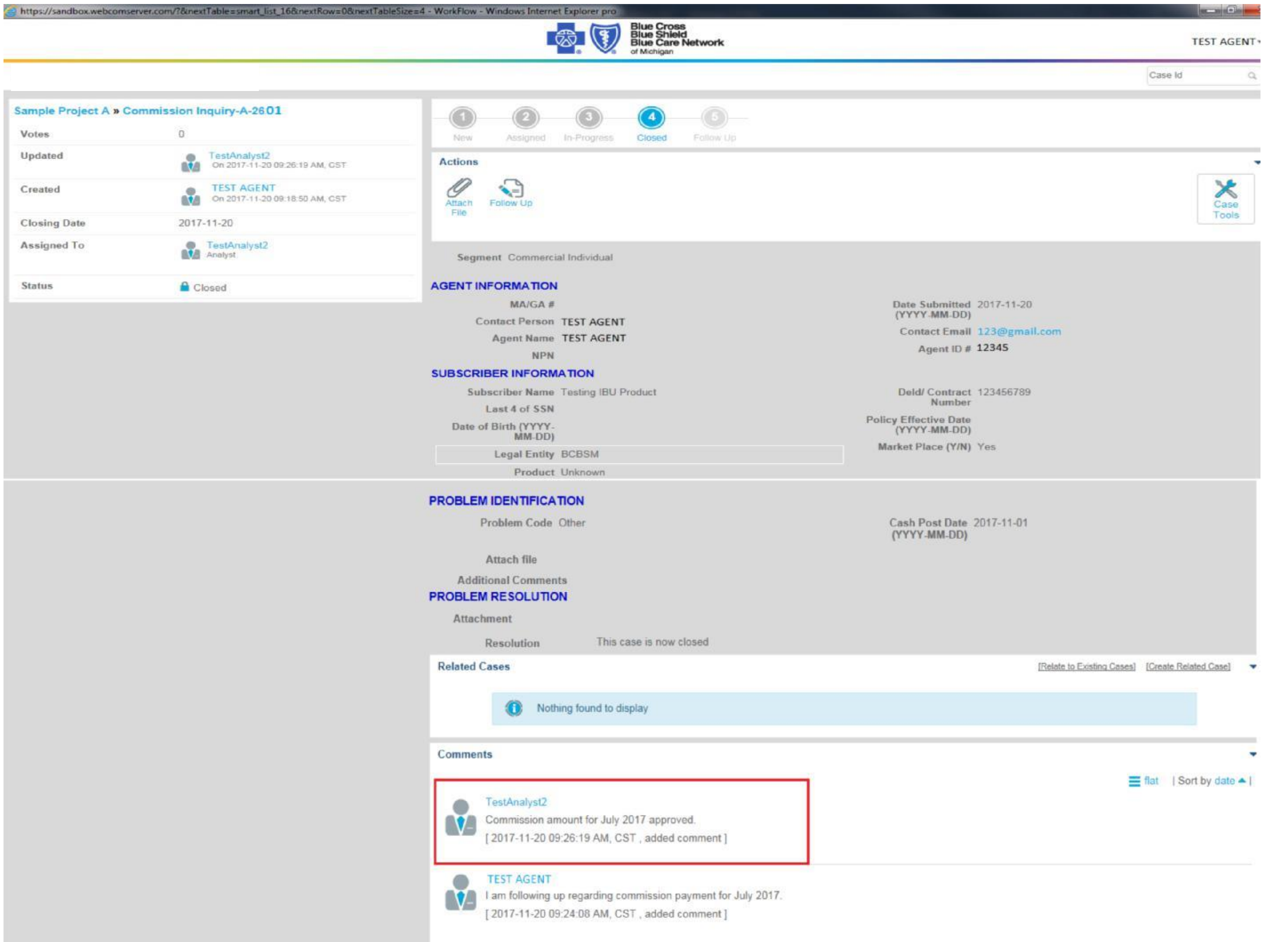
20. Once you have successfully submitted your follow up, you will receive an email notification.

21. You will be prohibited from performing any actions but will be able to view the current case details while your follow up request is being investigated.

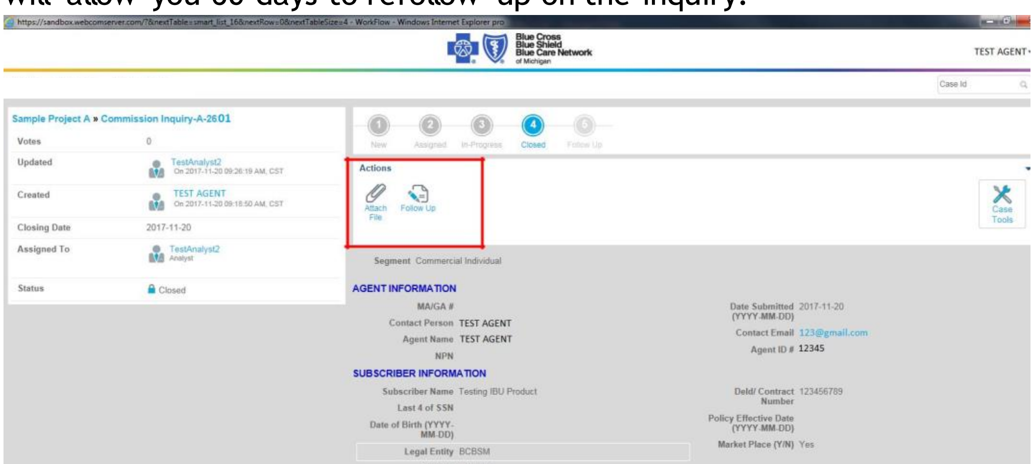


22. Once the follow up case has been closed, you will receive an email. You will be able to view the closed case by clicking the link within this email that will then navigate to **www.bcbsm.com**. You will then need to repeat steps 1 through 4 in this document. Click on the link provided under 'Manage My Disputes' on the **Sales Performance Home Page**.

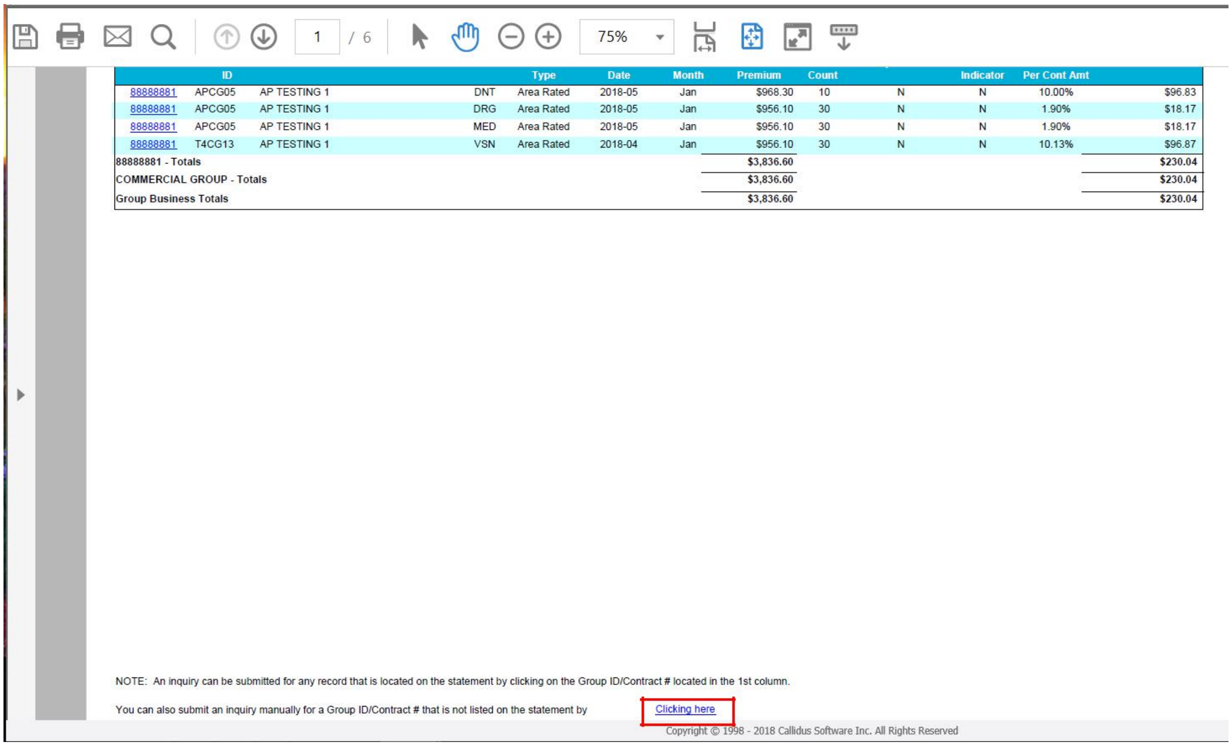
23. Analyst follow up comments can be found in "Comments" section.



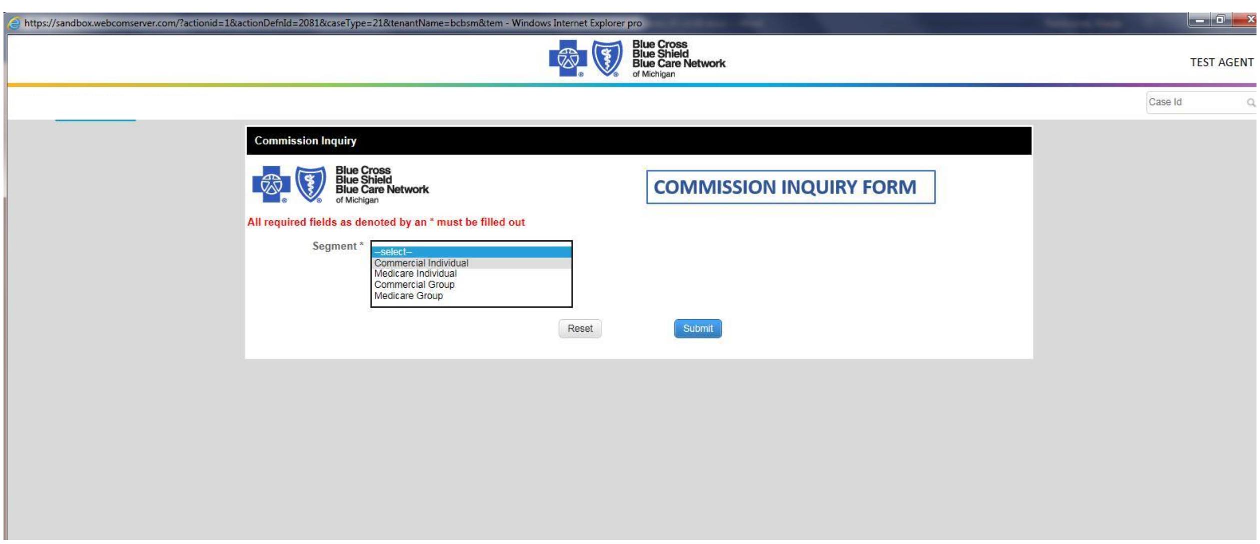
24. From the day the Analyst has moved the case back to closed status, the system will allow you 60 days to refollow up on the inquiry.



25. You can also submit an inquiry manually for a Group ID/Contract # that is not listed on the statement by clicking the link provided at the bottom of the statement.



26. Select the segment for which you want to submit an inquiry.



27. Depending on the segment selected, certain fields are auto populated into the inquiry form and they are non-editable.
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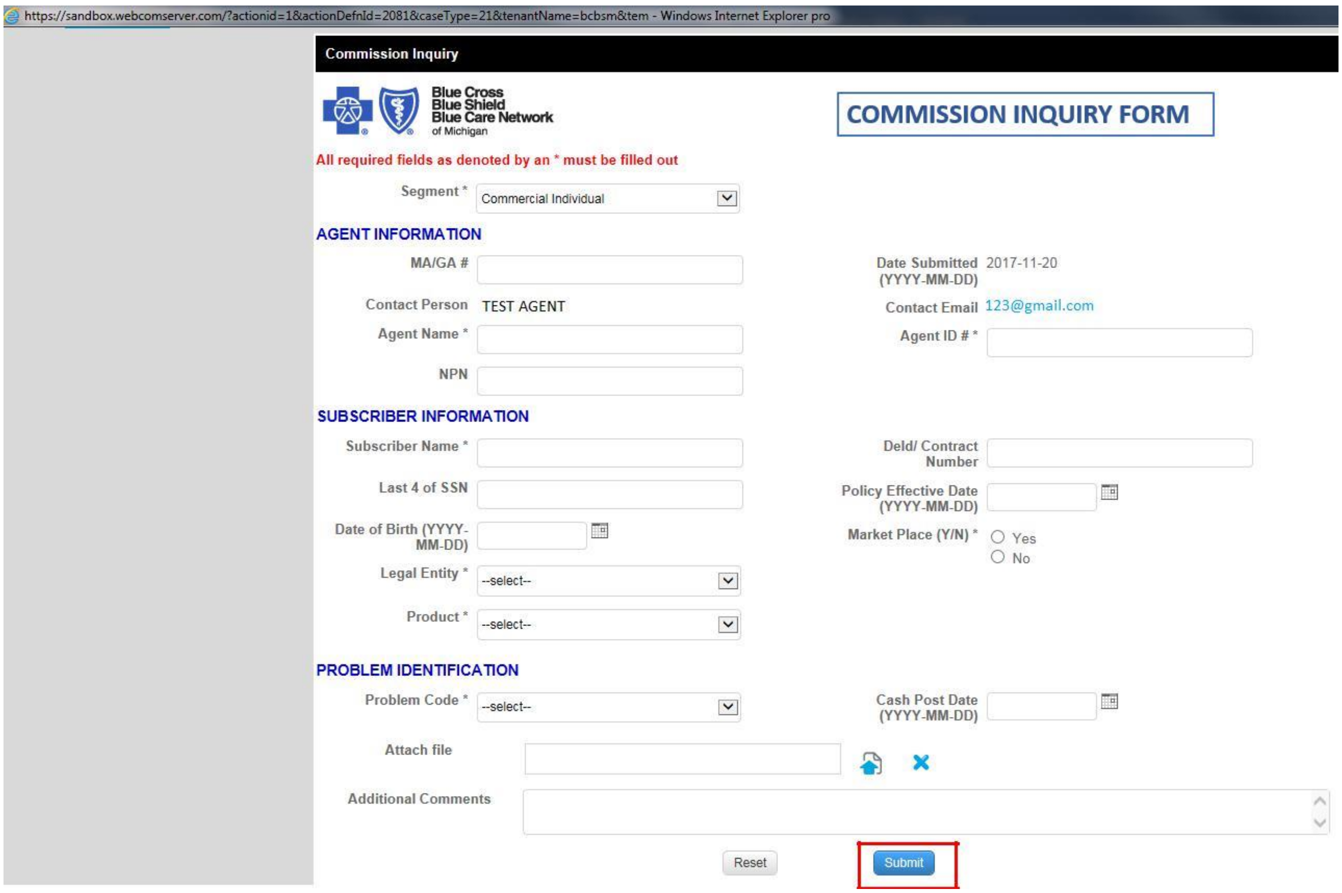

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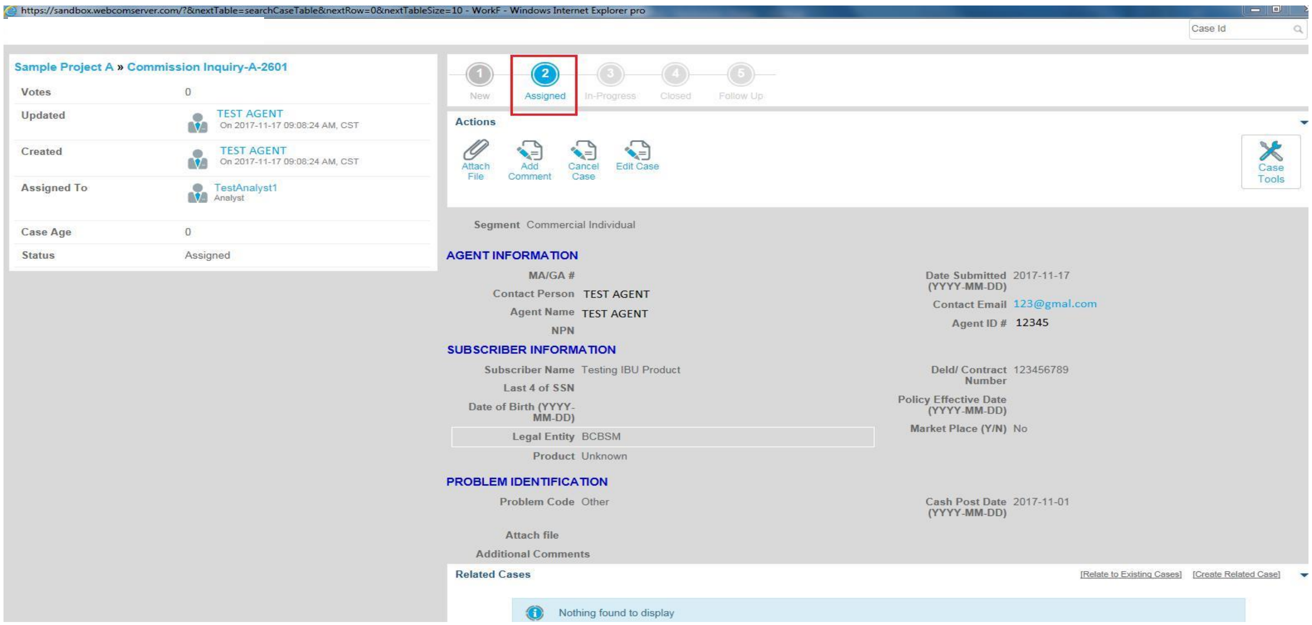

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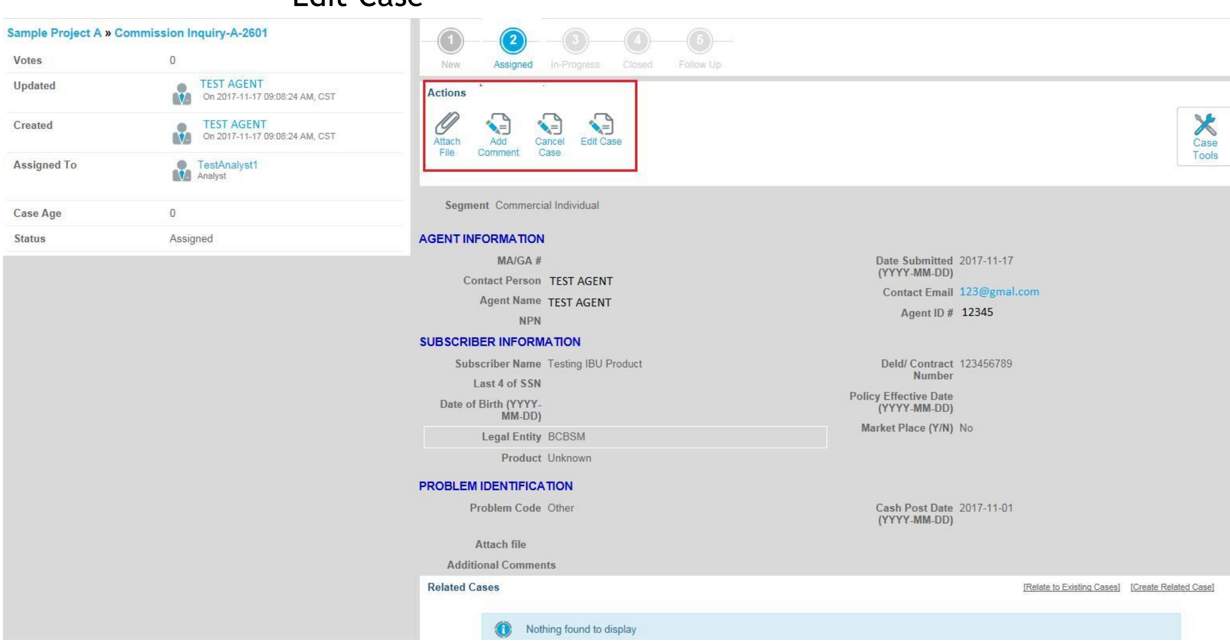

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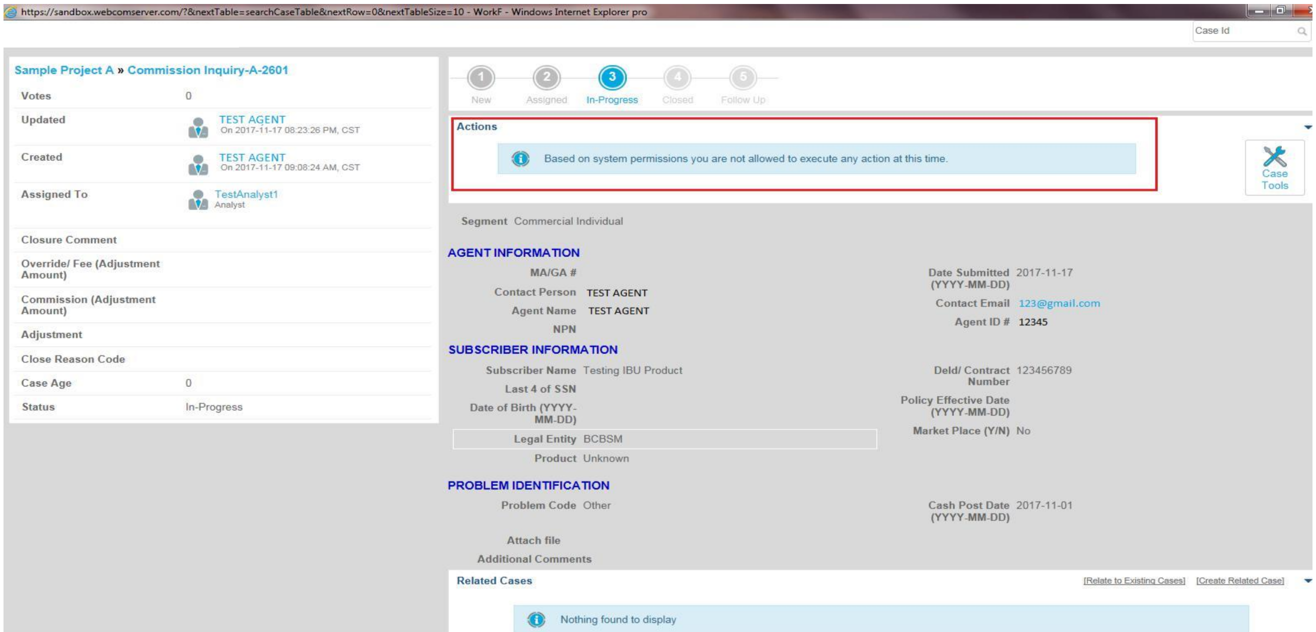

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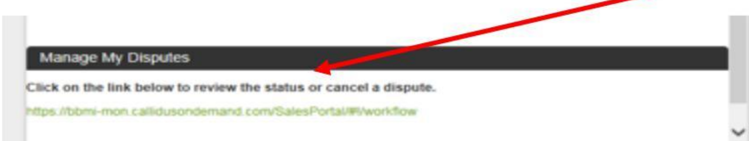

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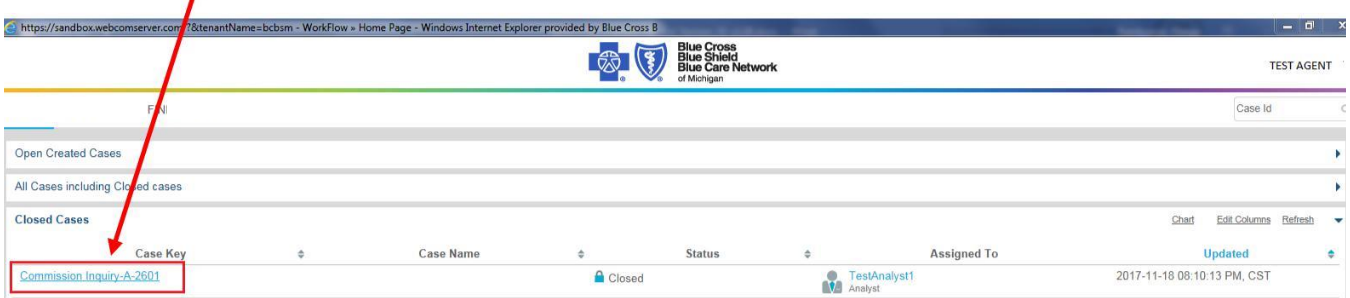
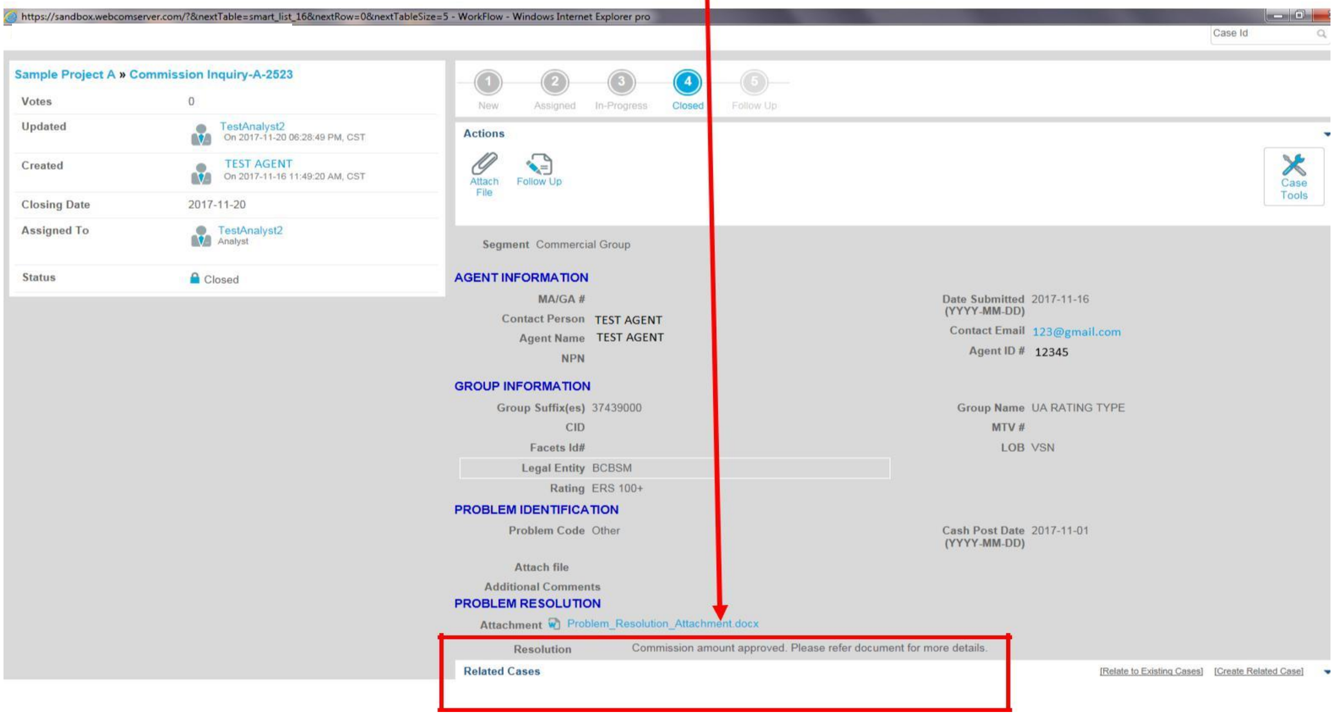
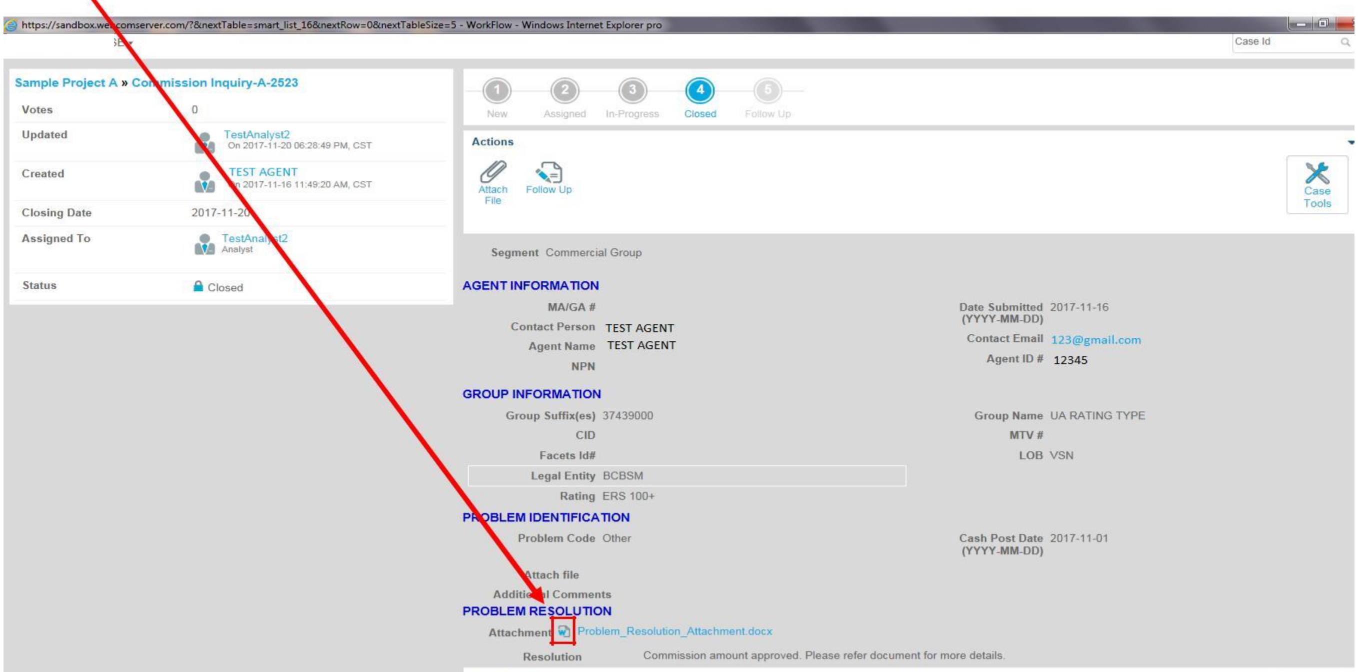


35. The investigation results can be found in the “Problem Resolution” section.



36. If there is an attachment included with the Problem Resolution, please click on the () to view the attachment.



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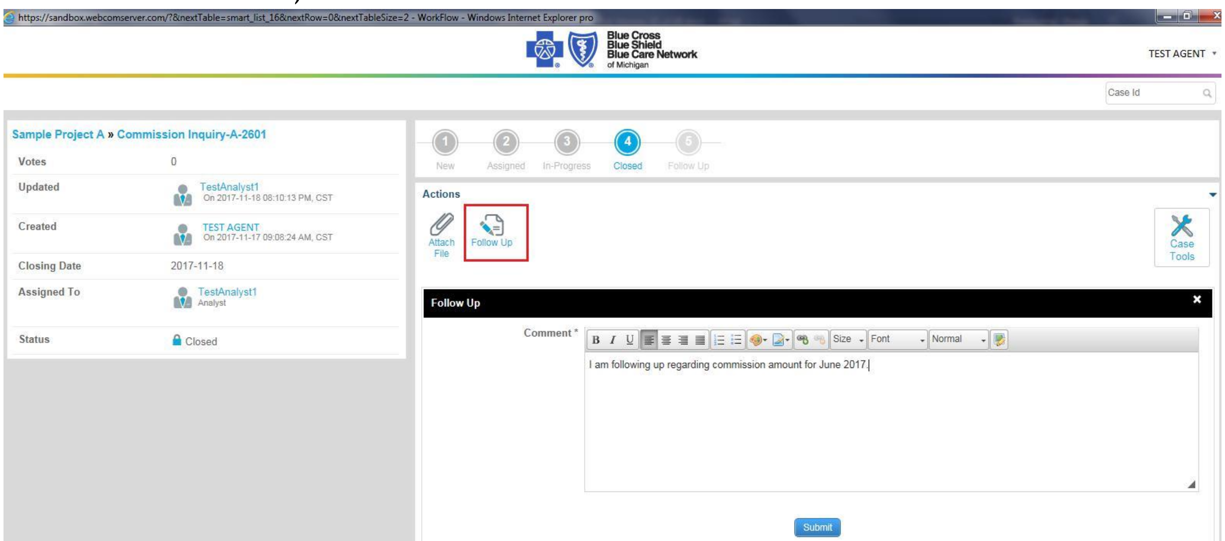
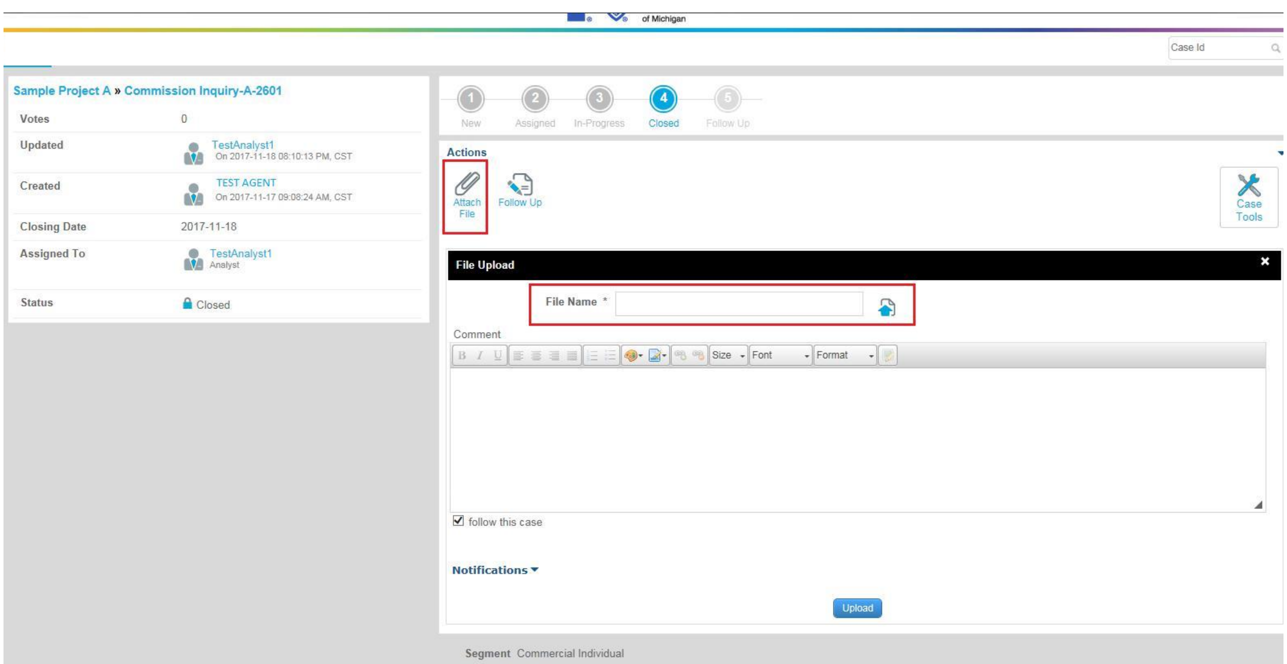
    - Follow Up (This option needs to be selected if you are NOT including a attachment)



    - Attach File (This option needs to be selected if you are including an attachment)



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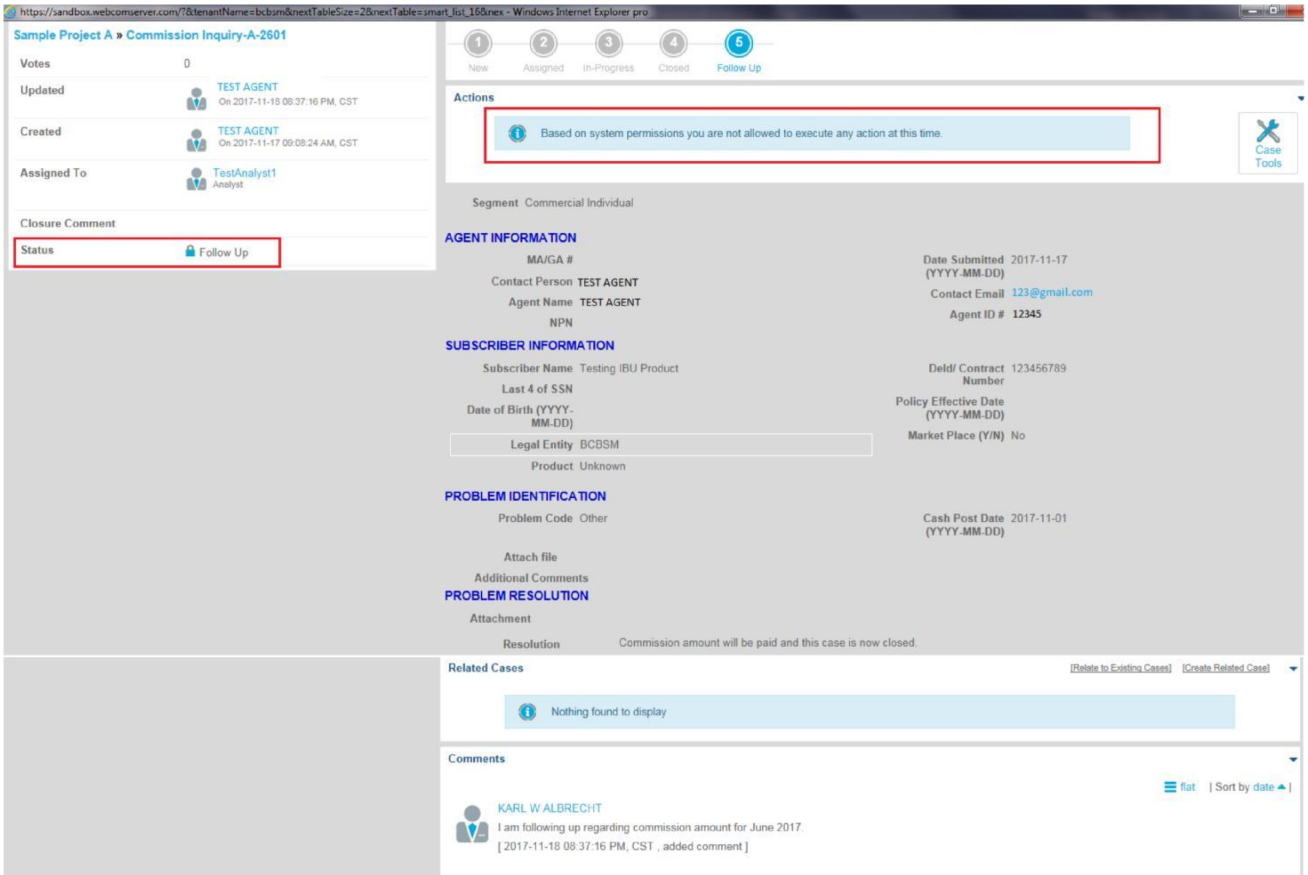

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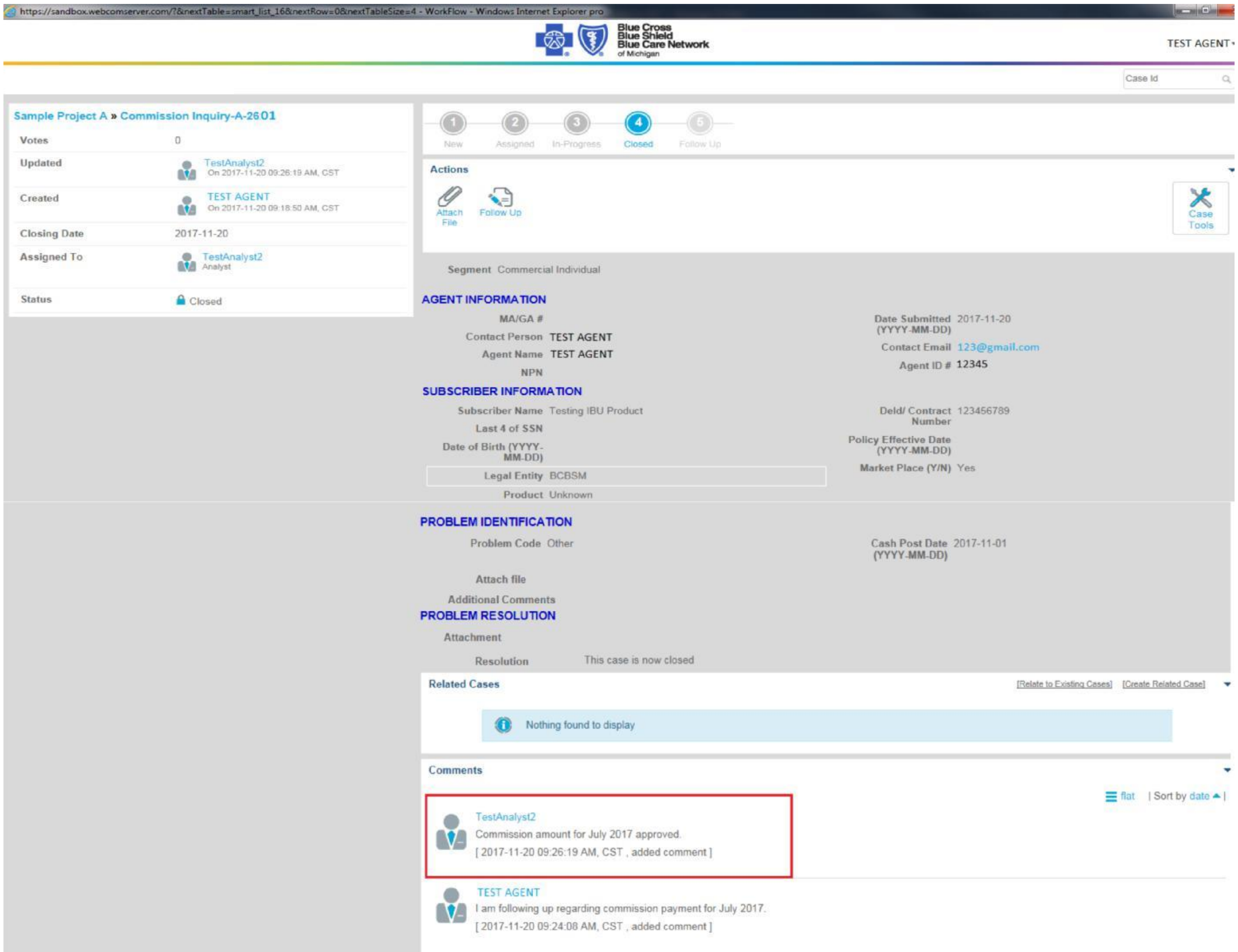
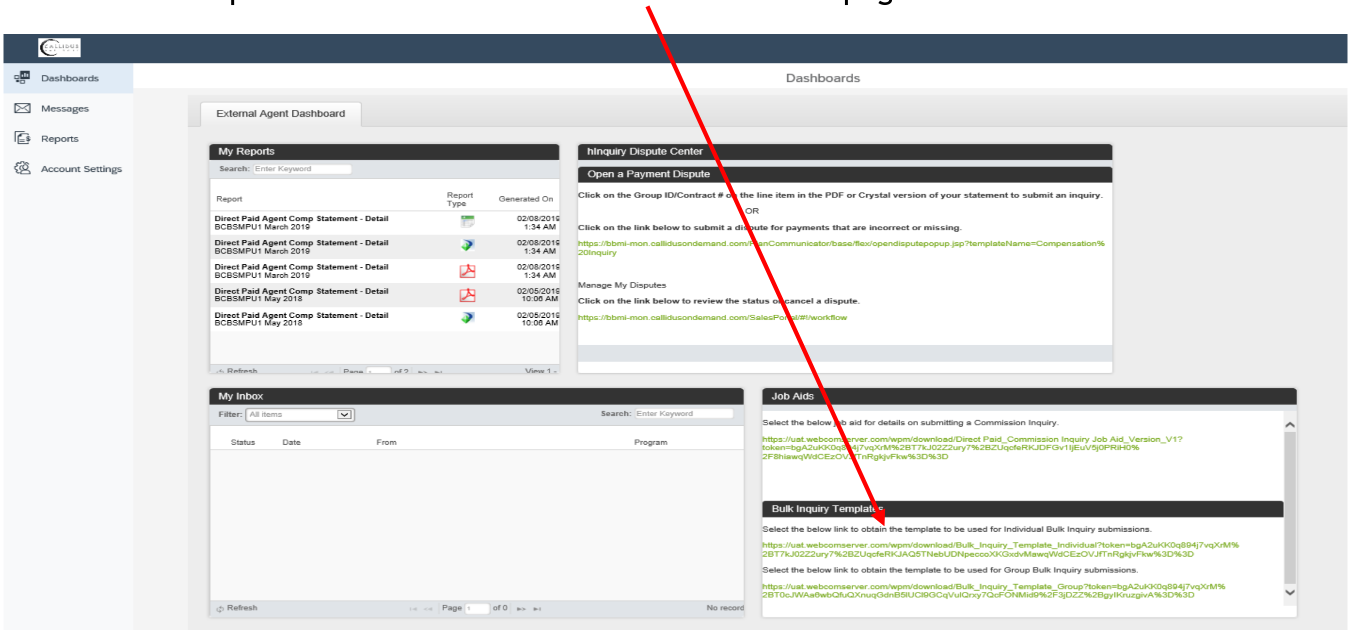


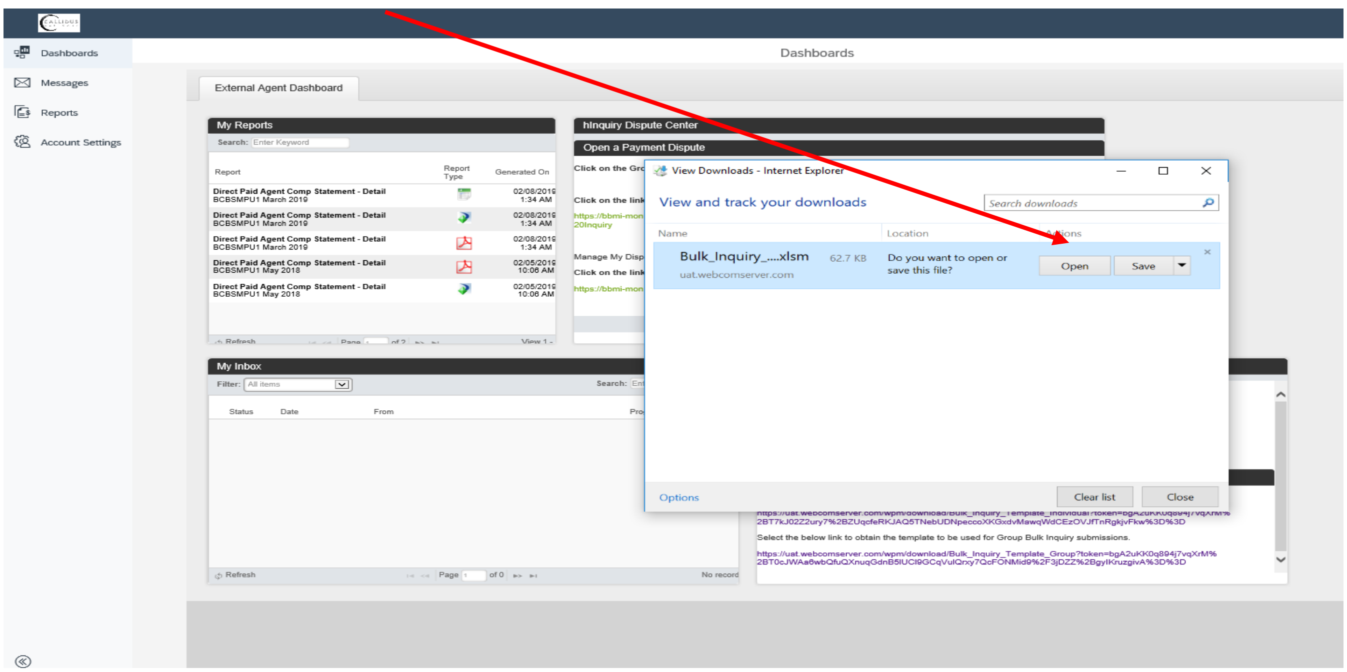
42. From the day the Analyst has moved the case back to closed status, the system will allow you 60 days to refollow up on the inquiry.

3 BCBS Bulk Inquiry

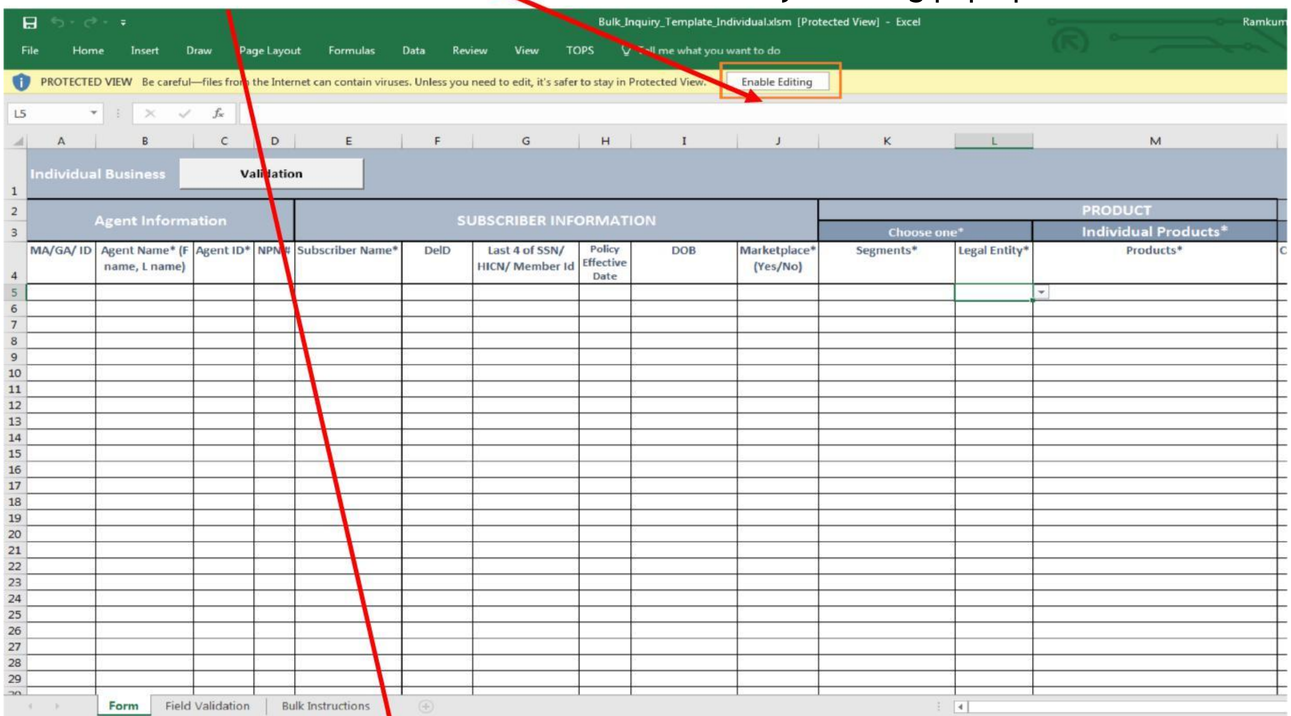
1. Complete steps 1 through 5 to login into Callidus.
2. Depending on the segment, select either Individual Bulk template or Group Bulk template to download from Sales Portal home page.

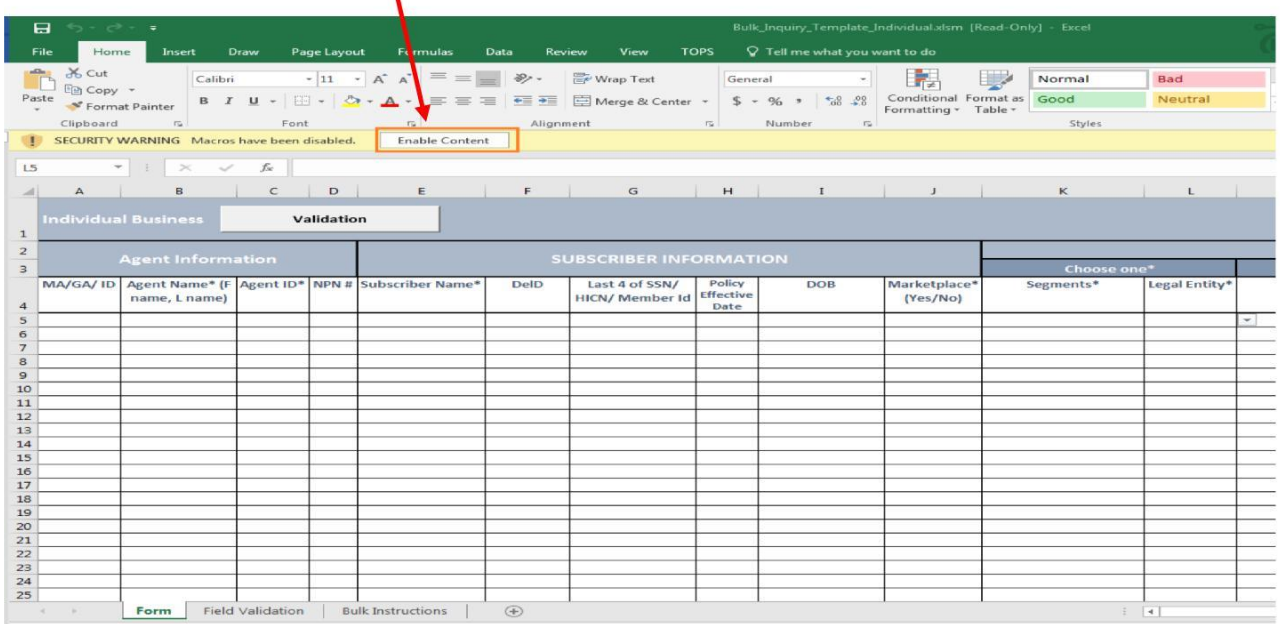


3. Once you open the desired template, a pop-up box will appear and select 'Open' from the 2 options 'Open', 'Save' listed and save it in your desired location.

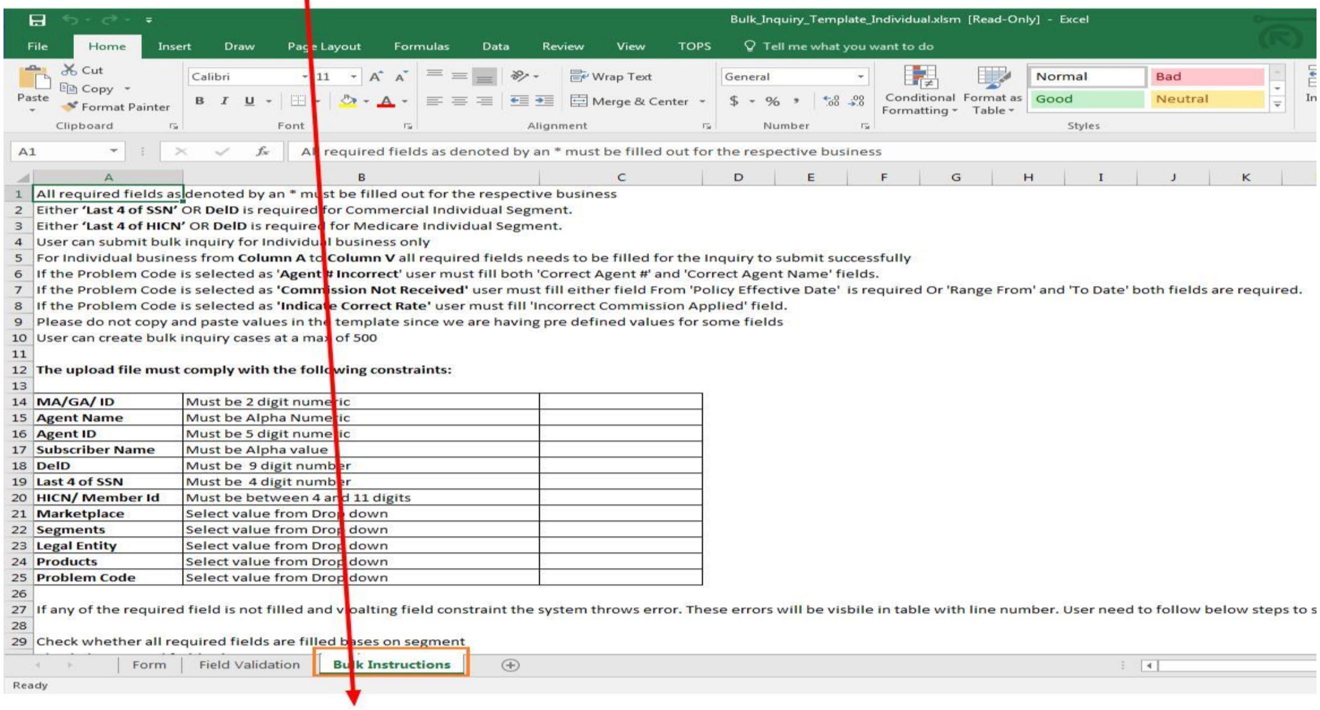


4. In order to reuse the template for future Bulk submissions, please save the template with the default name 'Bulk Inquiry Individual' or 'Bulk Inquiry Group' provided. Prior to completing and validating the form, please remember to save the file with a different naming convention of your choosing.
5. Once opened, click on 'Enable Editing' button from Protected View pop up and then click on 'Enable Content' button from Security Warning pop up.

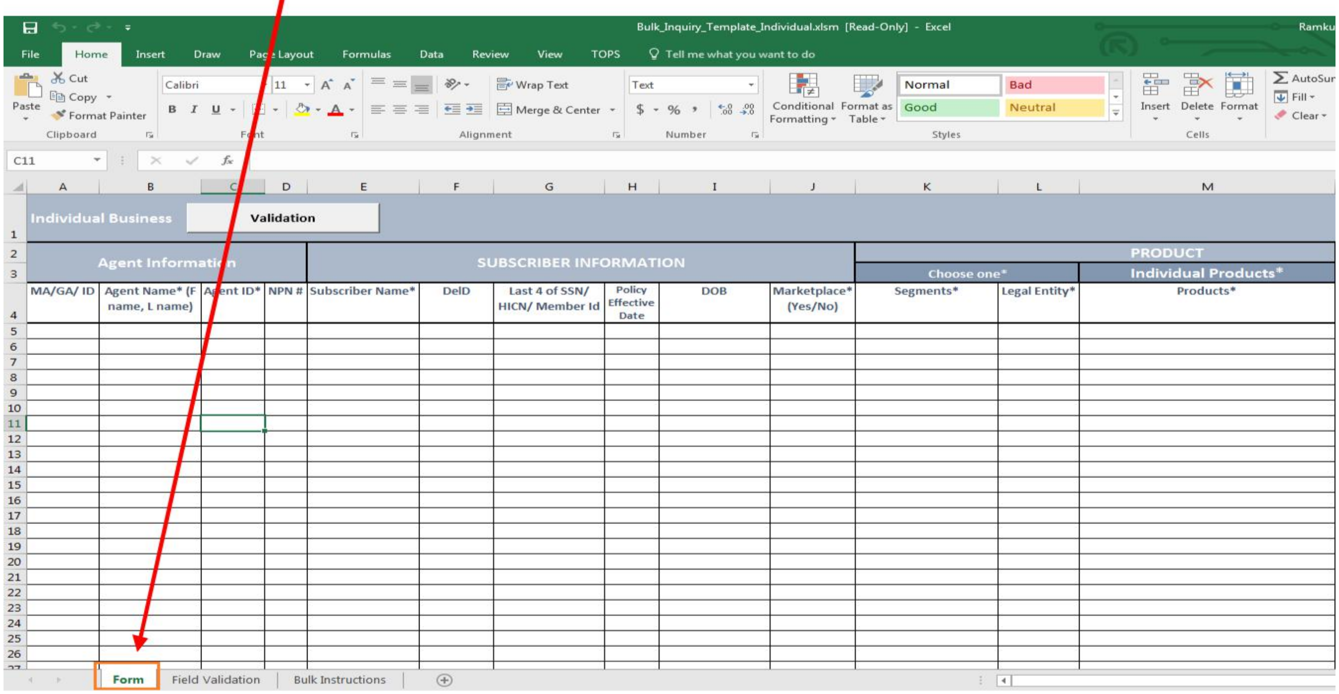




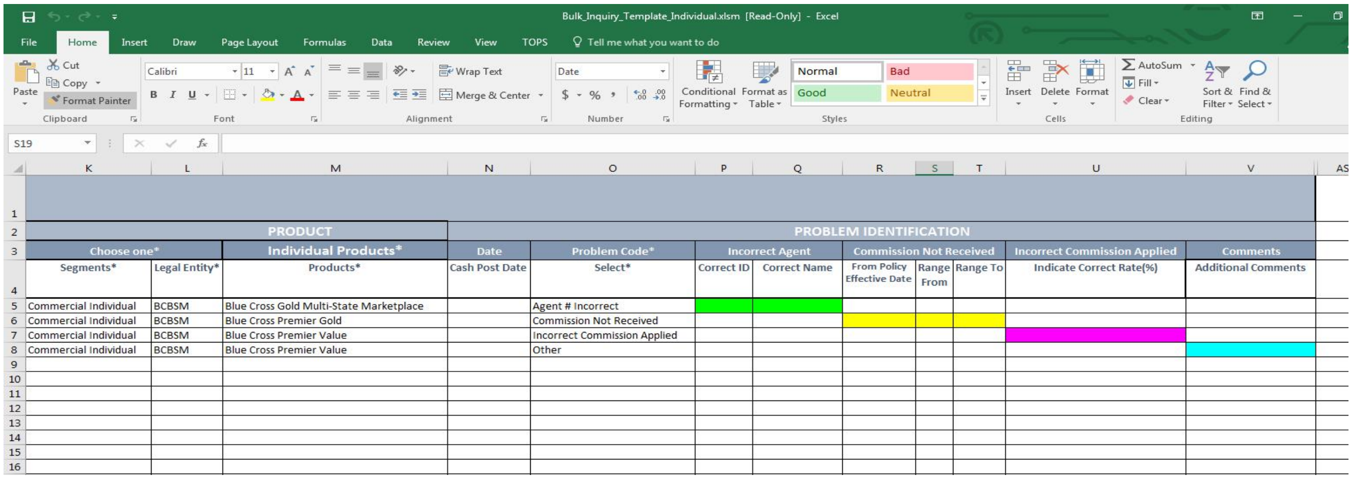
6. Navigate to Bulk Instructions tab for detailed instructions on the proper way to complete Bulk template. Note that certain fields are required and certain fields require specific values in order to successfully submit a template.



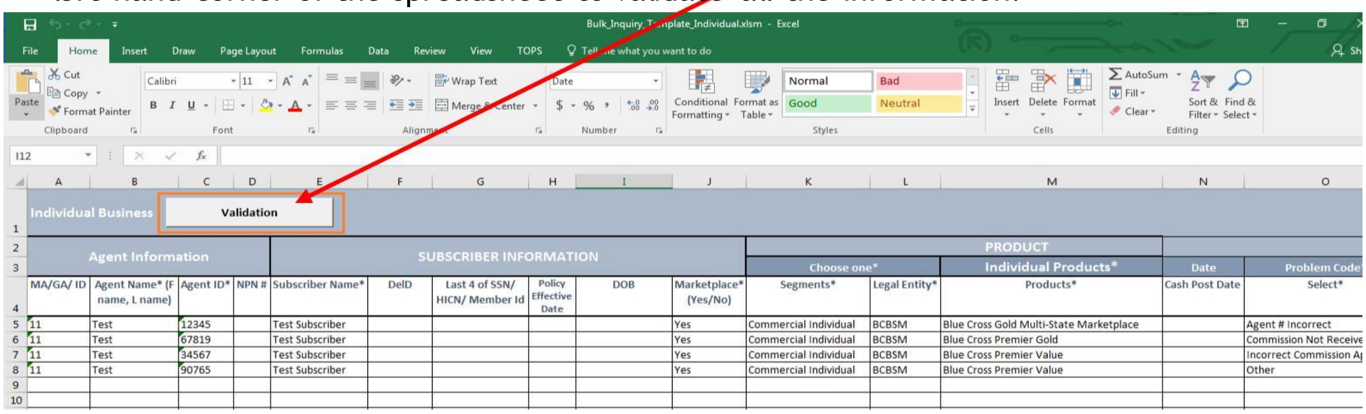
7. Navigate to the Form tab and begin entering the case details. Note the form is restricted to create a maximum of 500 inquiries.



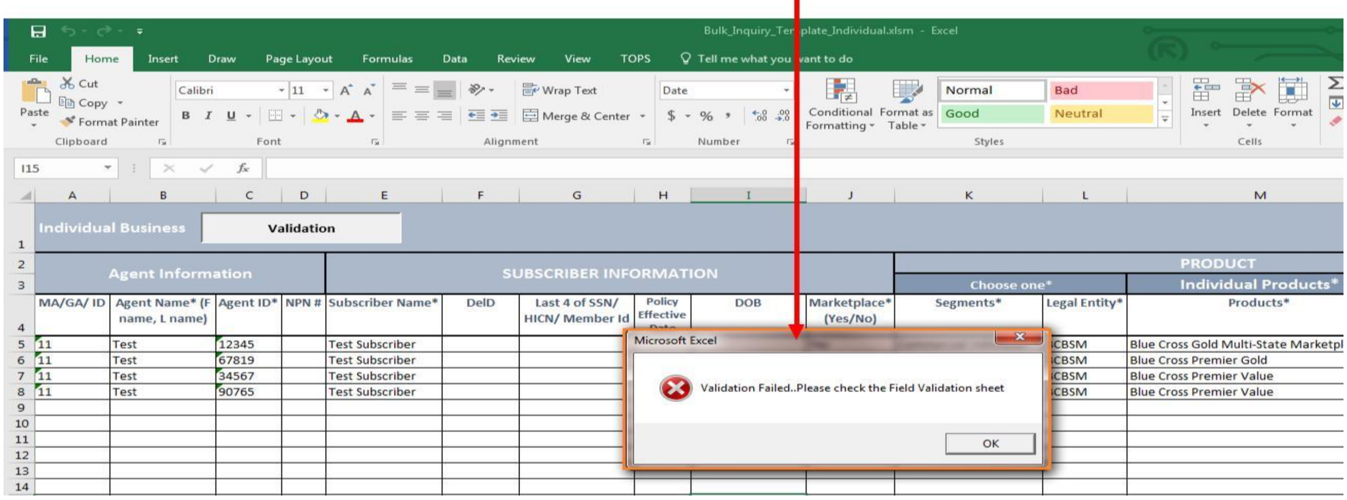
8. Once the appropriate Problem Code is selected, the associated required field(s) are highlighted as an indicator.



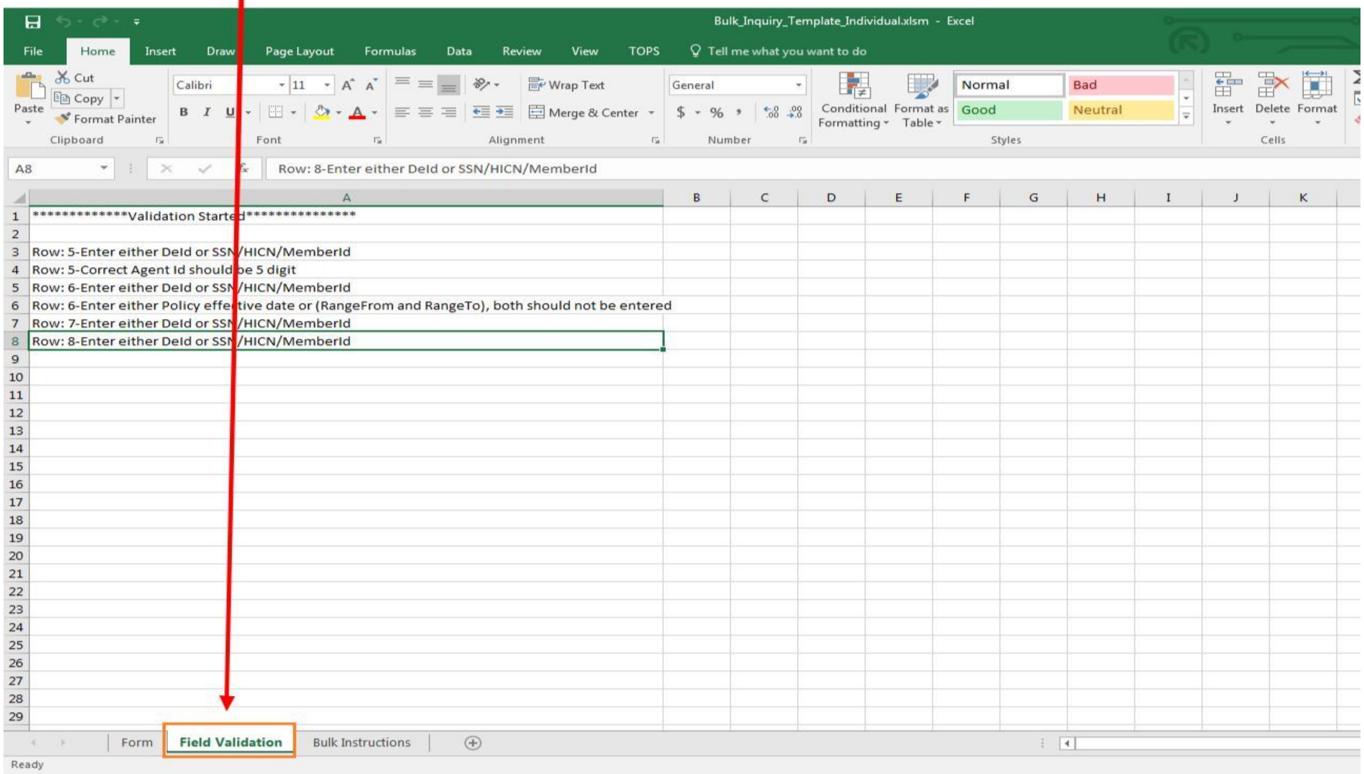
9. After completing the case information, click 'Validation' button from the upper left-hand corner of the spreadsheet to validate all the information.



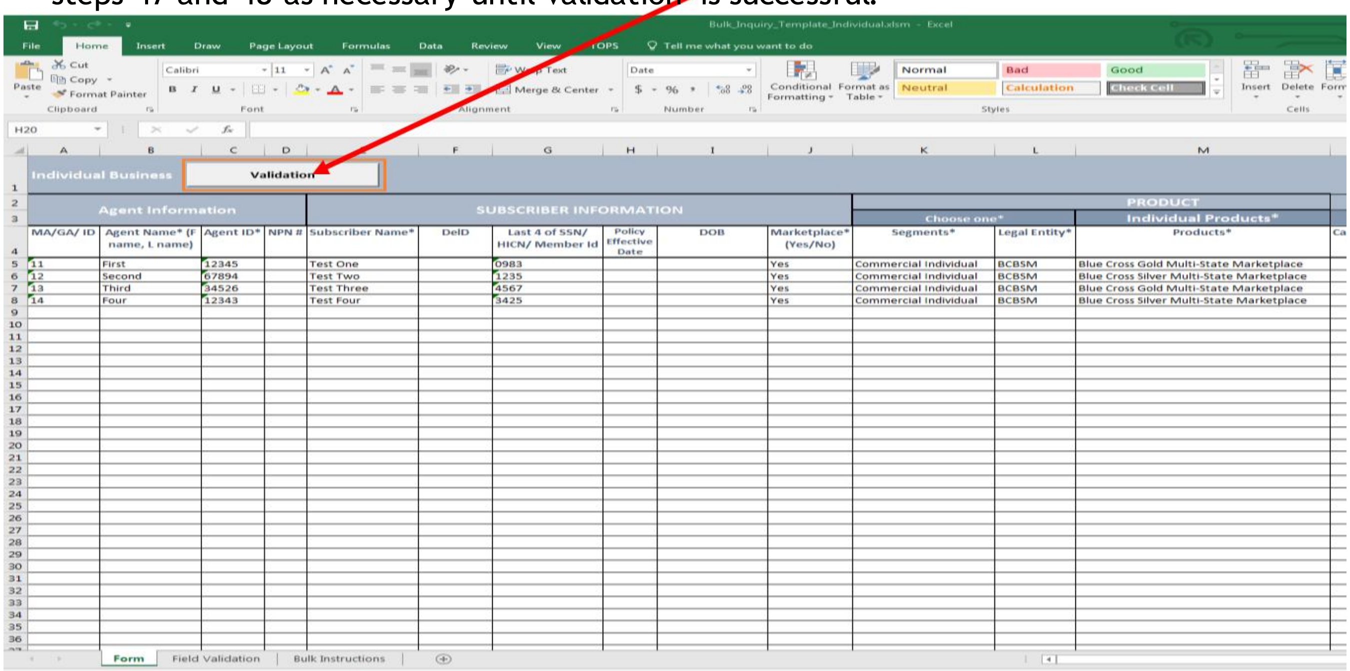
10. If any error exists, a pop up box will appear saying 'Validation failed. Please check the field validation sheet'. Click OK button.



11. Navigate to field validation tab to see details of the error(s).

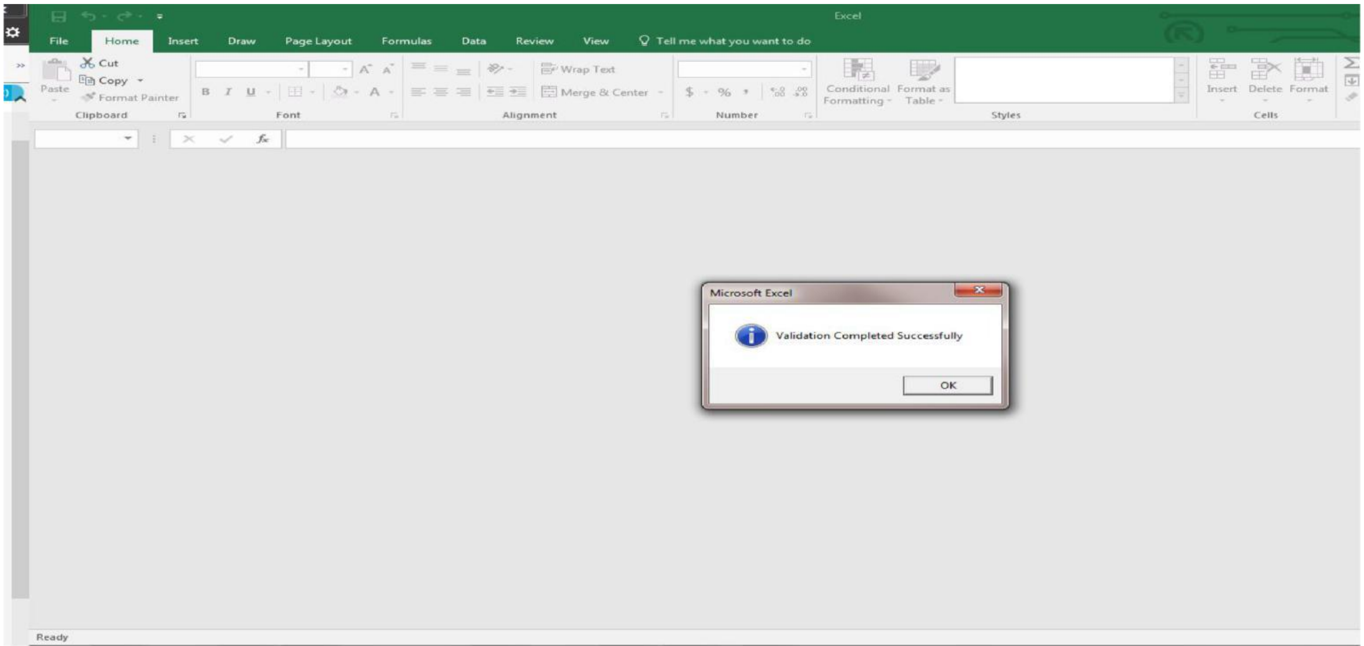


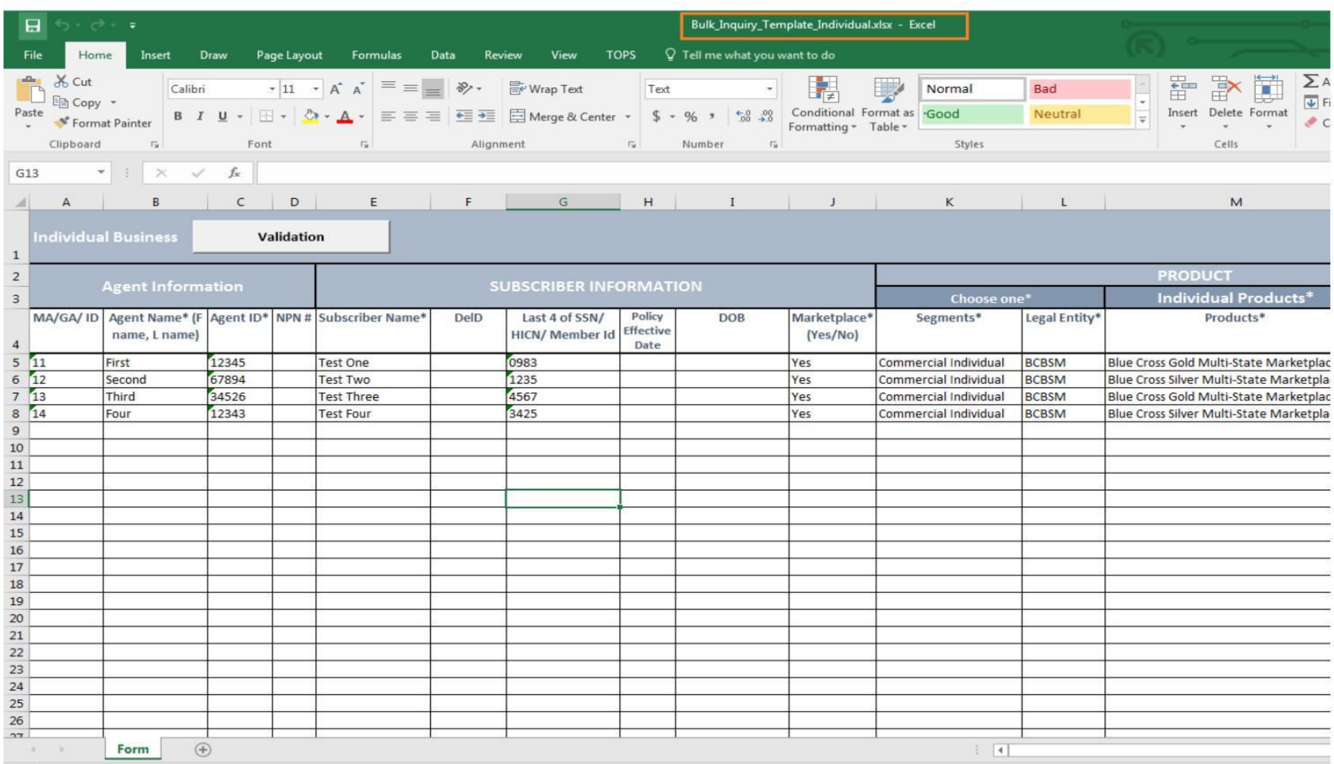
12. Fix the error(s) in the form sheet and click on ‘Validation’ button. Repeat steps 47 and 48 as necessary until validation is successful.



13. A pop up box will be displayed upon successful validation and the file will be automatically saved as an .xlsx format in the same location where the file was originally saved. This is the file required by the system to upload. Click OK in the pop up box.

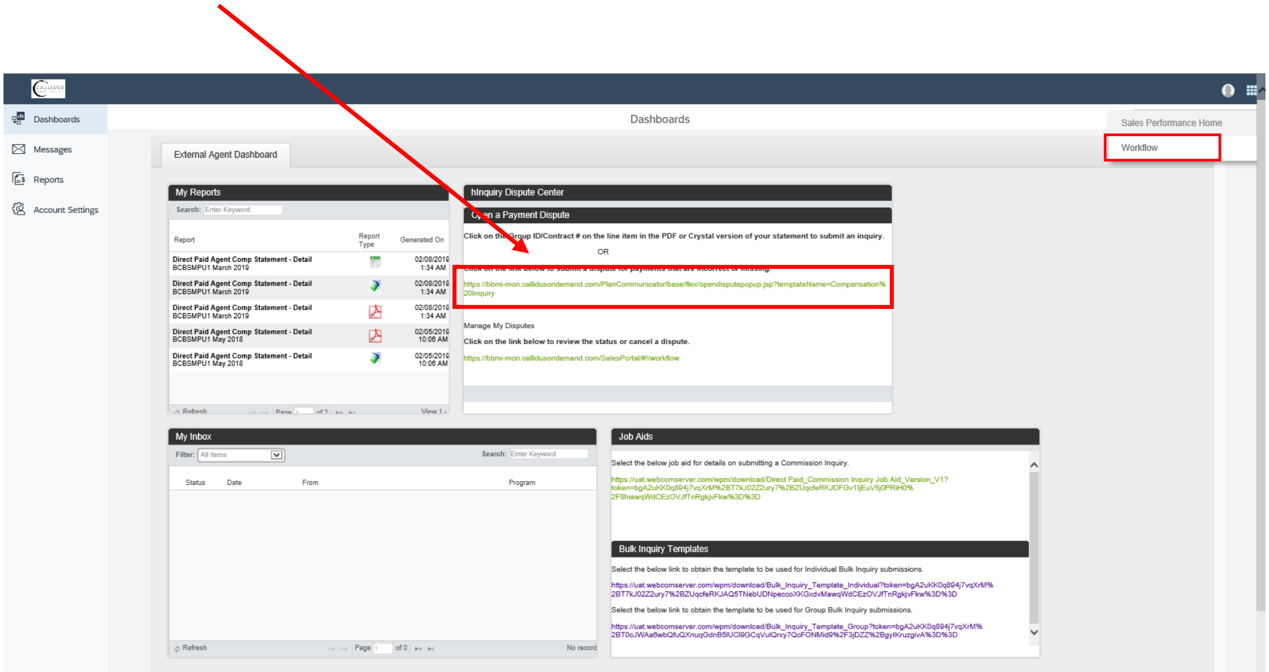
Note: File format needs to be in .xlsx formats. The system will not accept any other formats.



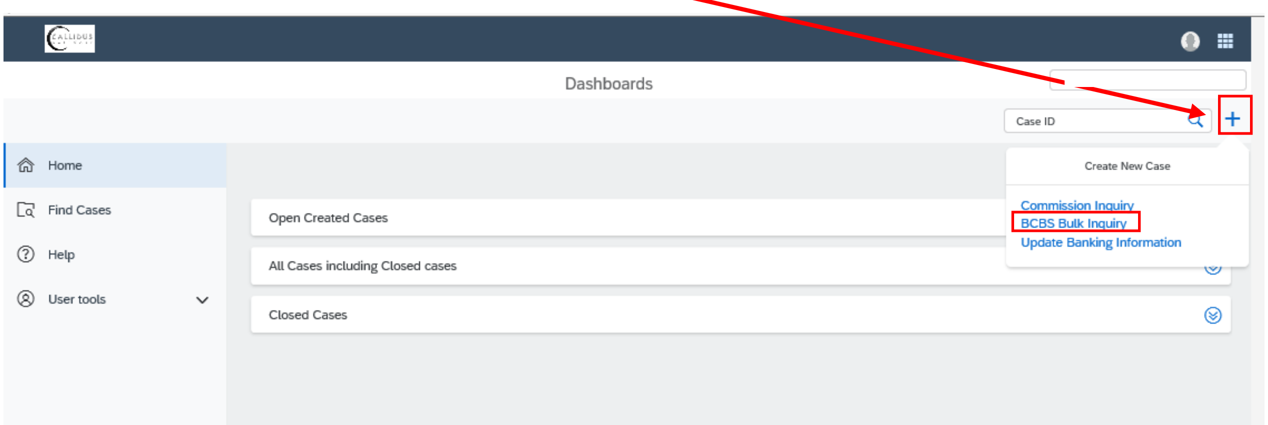


BCBS Bulk Inquiry, *continued*

14. Select either Workflow dropdown from upper left-hand corner of the dashboard or click the highlighted link in the below snapshot to navigate to Workflow home page.

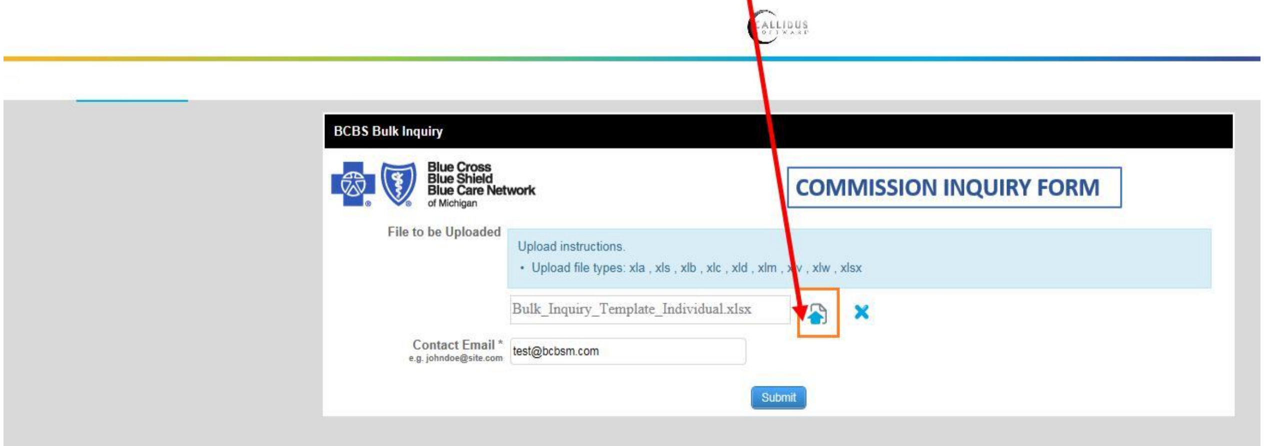


15. Once in workflow, click on '+' sign on the upper right-hand corner of the dashboard and select BCBS Bulk Inquiry from the drop-down list.

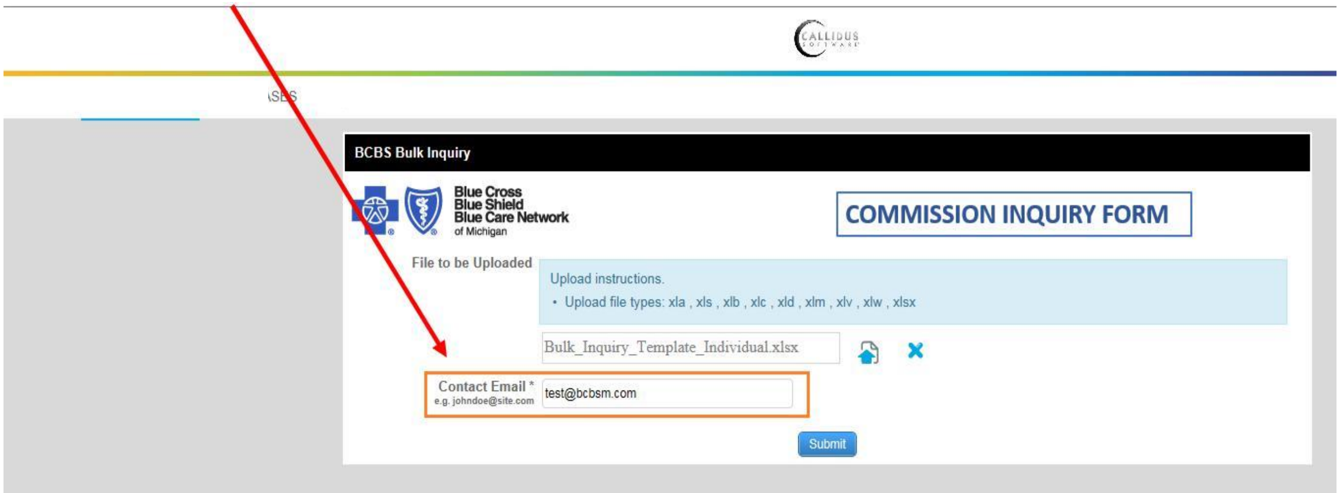


BCBS Bulk Inquiry, *continued*

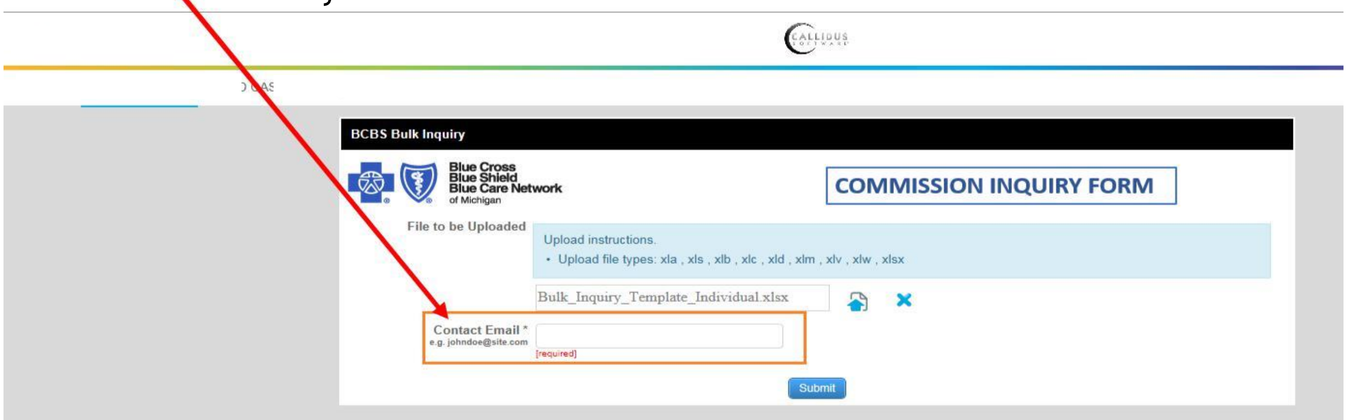
16. From the BCBS Bulk Inquiry screen, click on the upload icon and select the .xlsx version of the file to be uploaded and click open button.



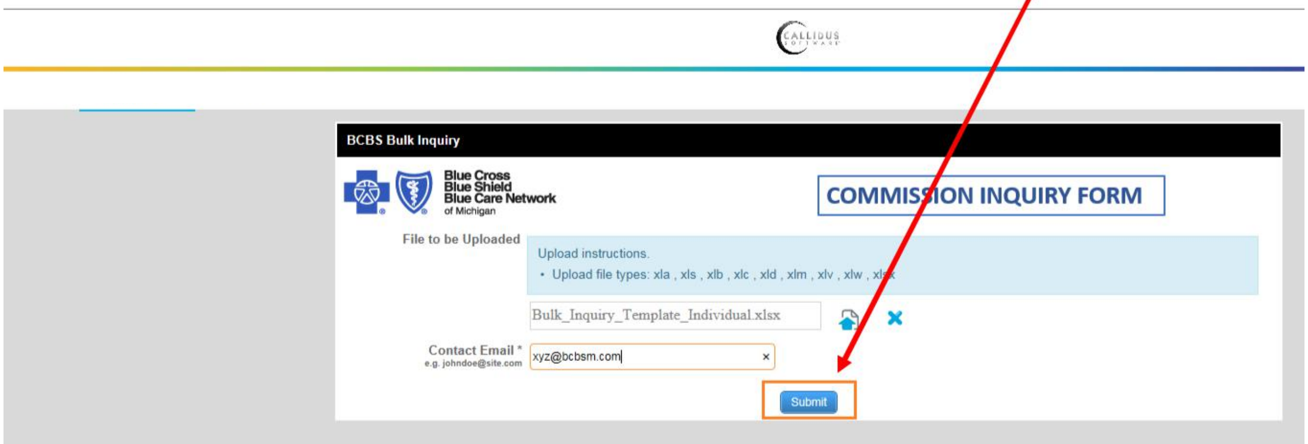
17. If Contact Email is already on file, this will be displayed in the Contact Email field. However, default Contact Email can be modified.



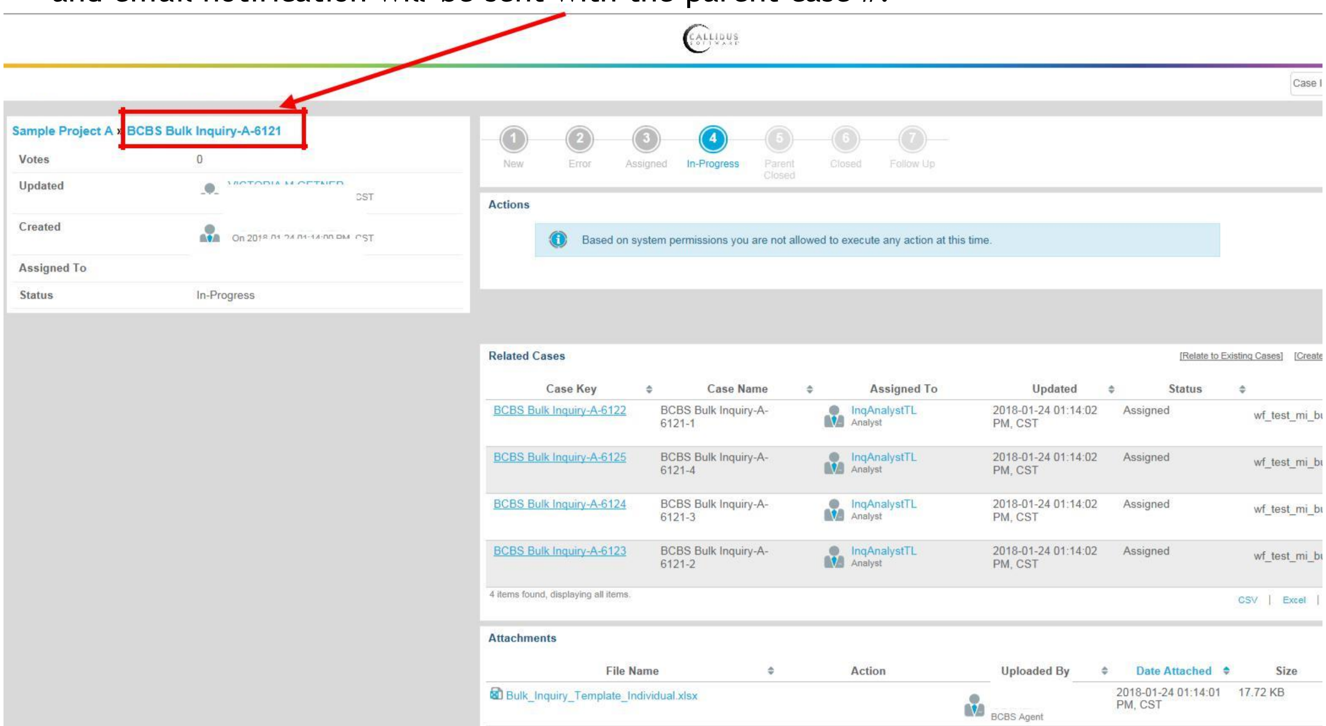
18. If Contact Email is not on file, this is required and needs to be completed in order to successfully submit the form.



19. Once the desired file is uploaded with email address specified, select Submit button. Please note this may take up to 5 minutes for the form to get loaded successfully.

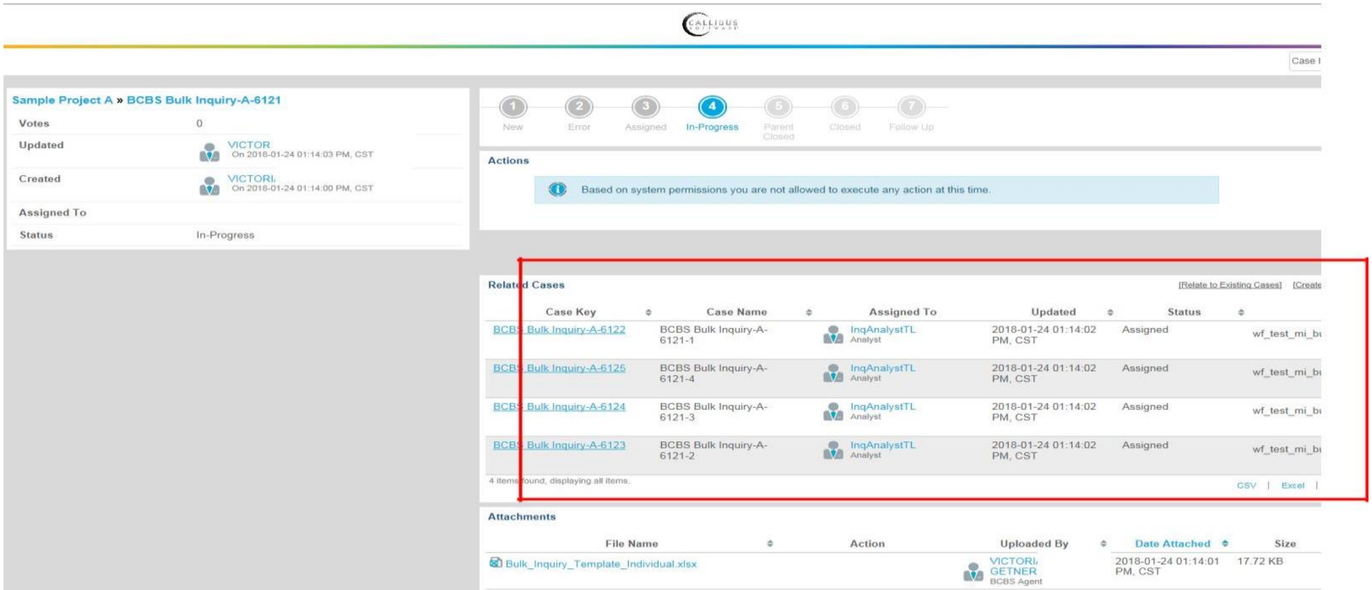


20. Once the loading is complete, you will be navigated to parent case detail screen and email notification will be sent with the parent case #.

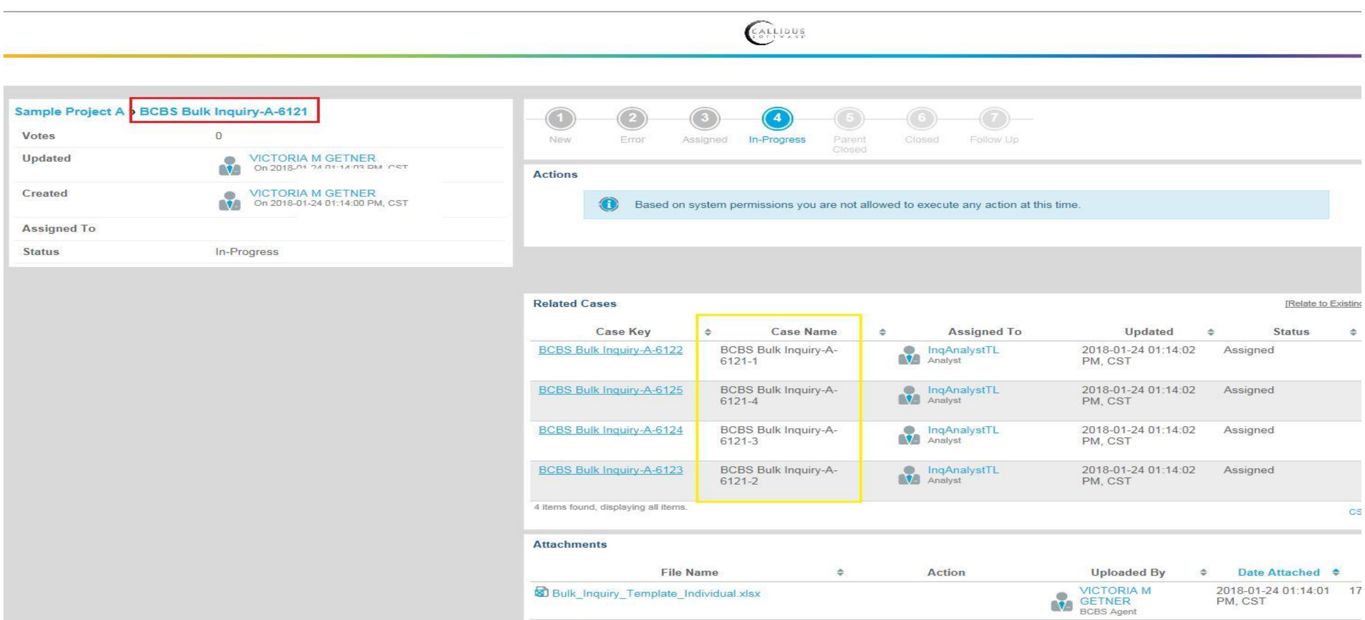


BCBS Bulk Inquiry, *continued*

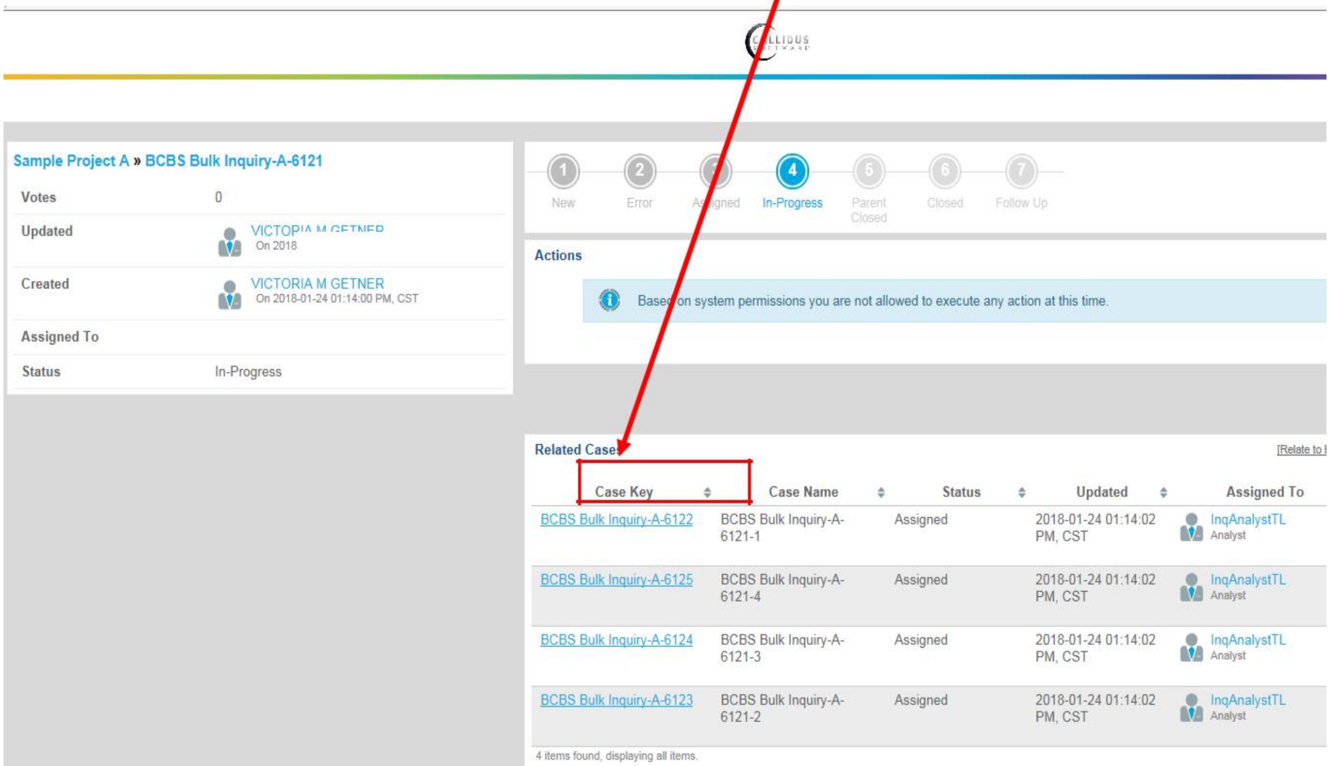
21. The parent case is not an actual Inquiry case, it is a placeholder providing one case # representing all of the Bulk Inquiry cases (called child cases), per template.



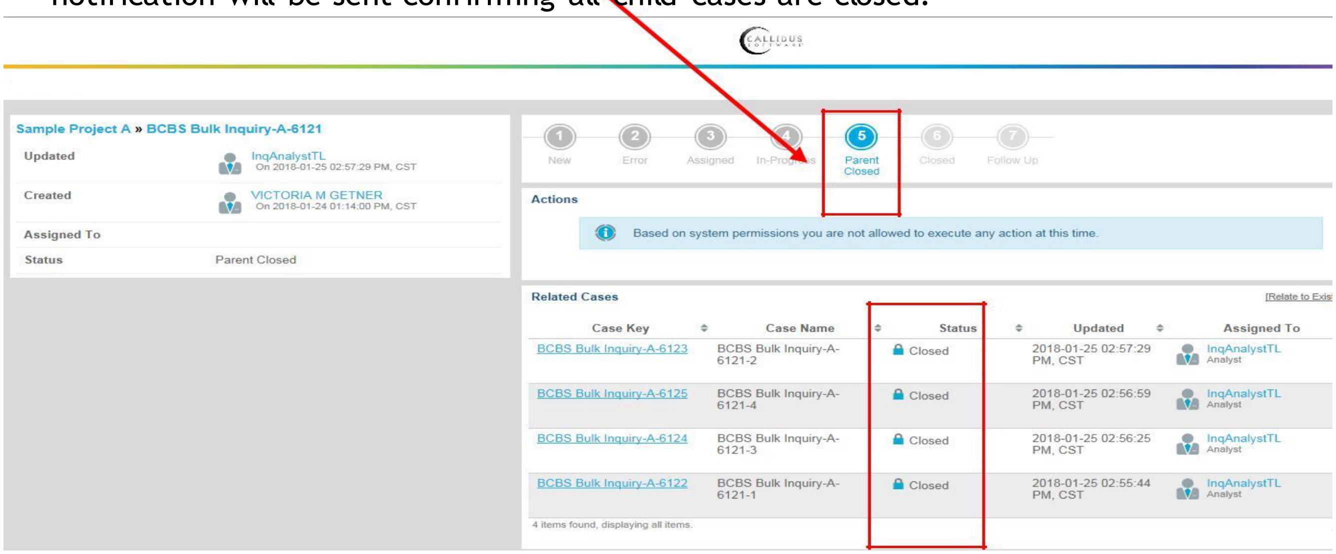
22. The parent Case Key # is shown in the red box below and the associated child cases are shown under 'Case Name' in the yellow box below. Notice, per snapshot below, the parent case key # is 'BCBS Bulk Inquiry-A-6121' and child case names are 'BCBS Bulk Inquiry-A-6121-1', 'BCBS Bulk Inquiry-A-6121-2',' BCBS Bulk Inquiry-A-6121-3' and 'BCBS Bulk Inquiry-A-6121-4' which shows there are 4 cases loaded with this individual template.



23. To know more about child cases, select the Case Key hyperlink from within the parent case detail screen, look for the case in home page menu, or search the specific case in Find Cases screen.

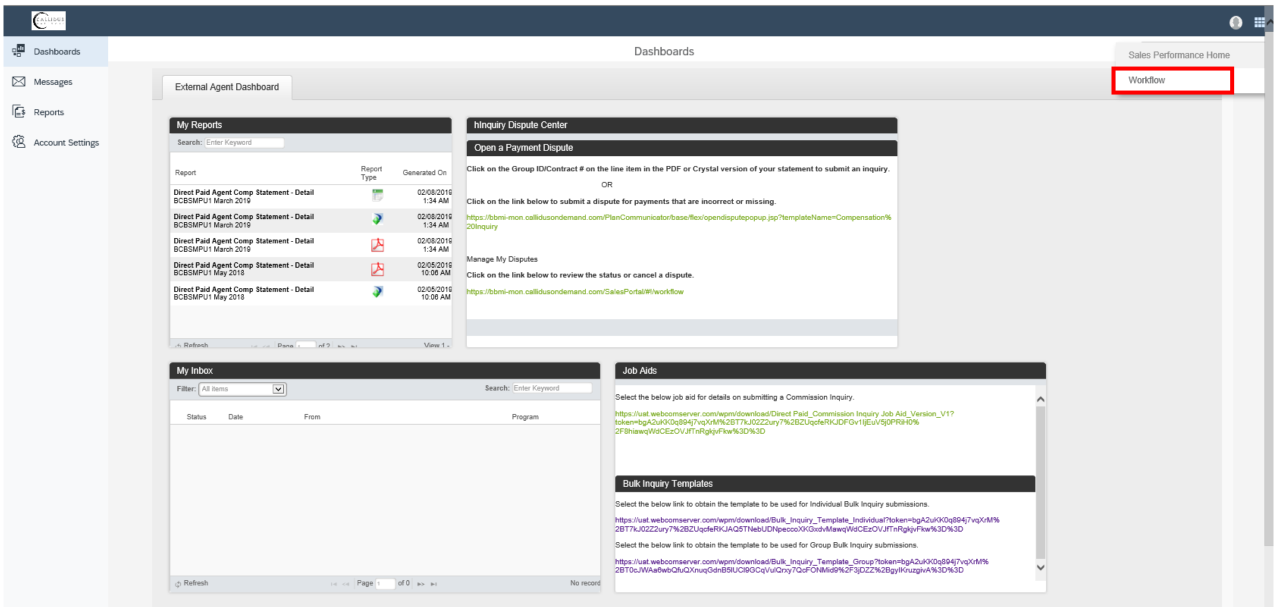


24. Child cases from Bulk template will behave the same way as Manual/Statement Inquiries. They will be defaulted to assigned status and when assigned Analyst is ready to work the case, it will be moved to In-Progress status.
25. The parent case will remain in In-Progress status until all of the child cases are closed. At this point the status will change to Parent Closed and email notification will be sent confirming all child cases are closed.

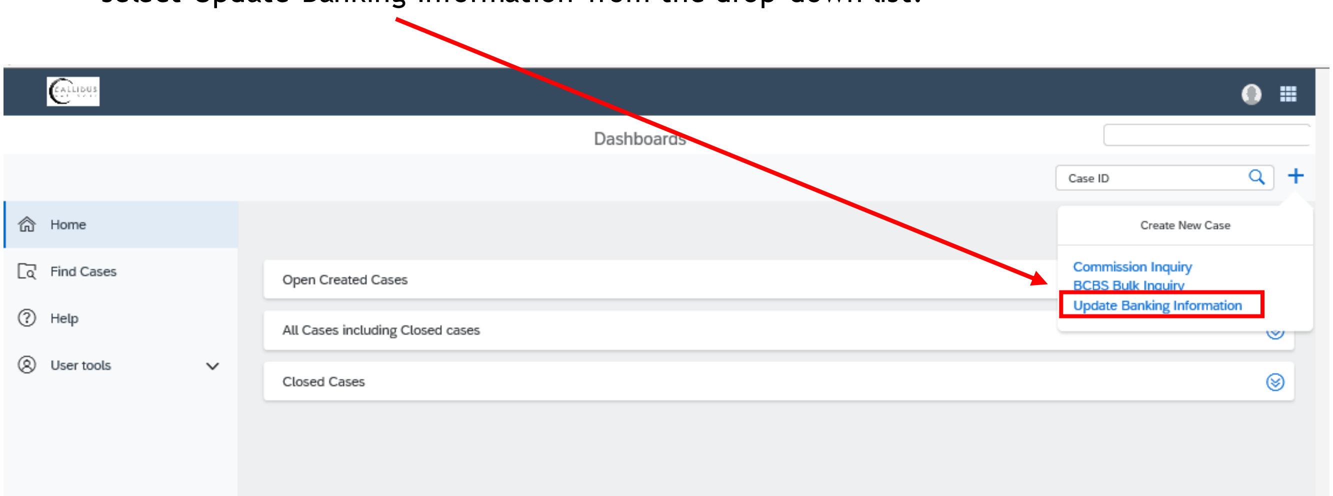


4 Update Banking Information

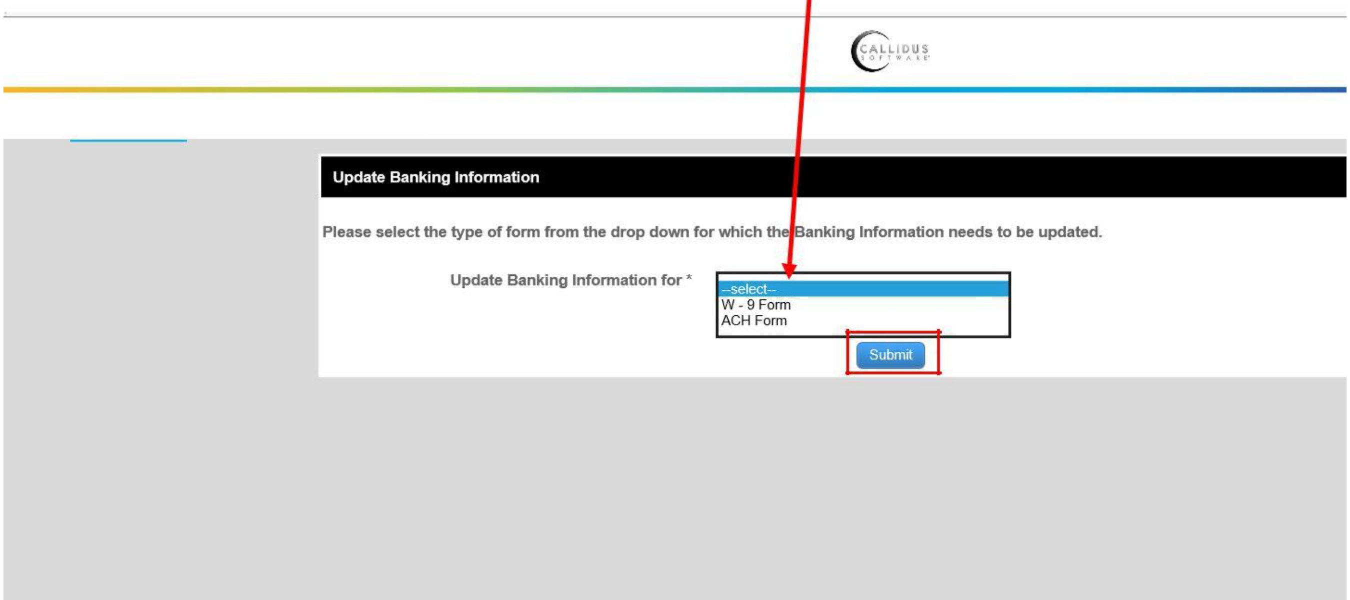
1. Complete steps 1 through 5 in page 3 to login into Callidus.
2. Click on the Sales Performance Home drop down and select the option Workflow from upper left-hand corner of the dashboard.



3. Once in workflow, click on '+' sign on the upper right-hand corner of the dashboard and select Update Banking Information from the drop-down list.

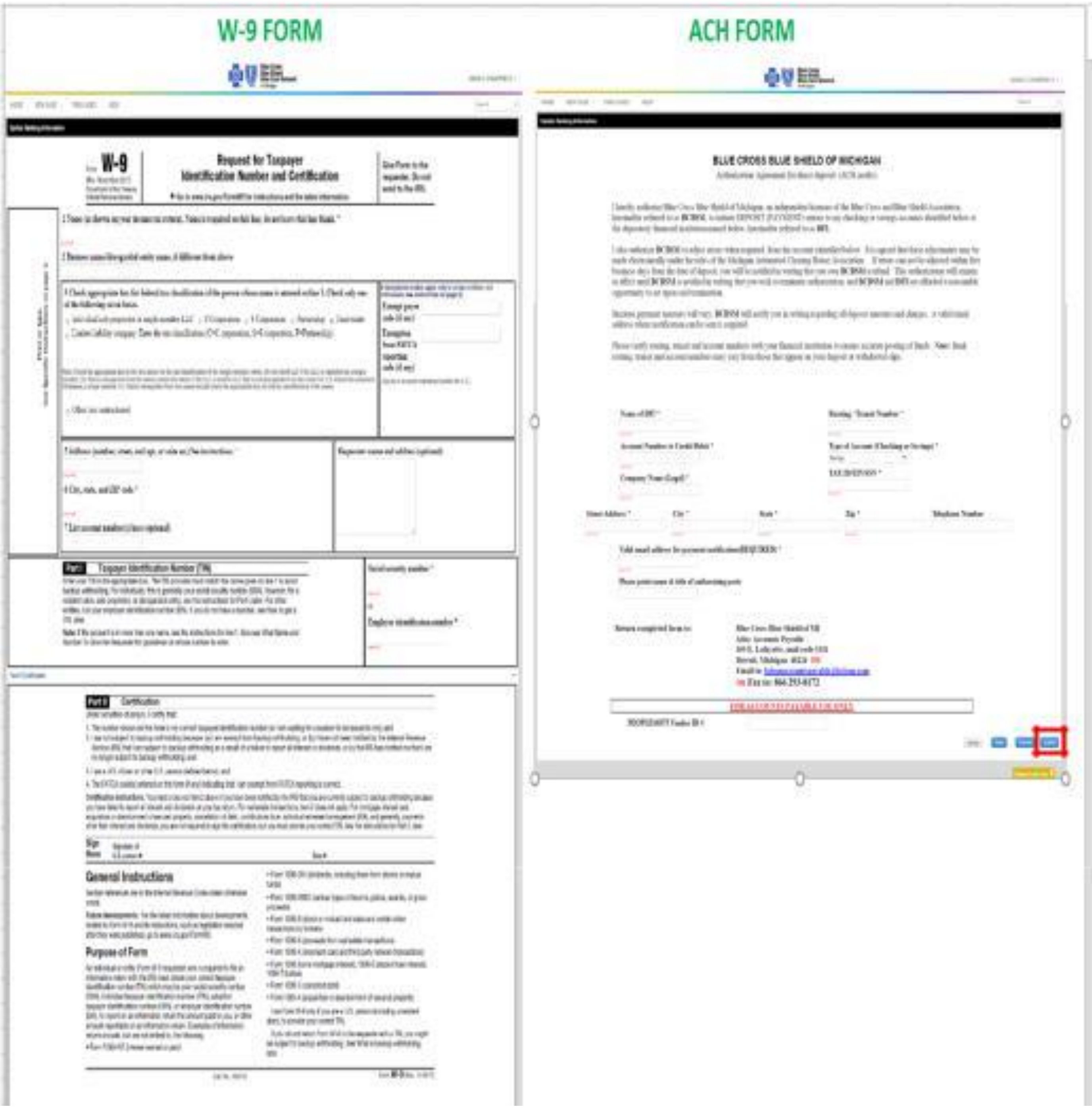


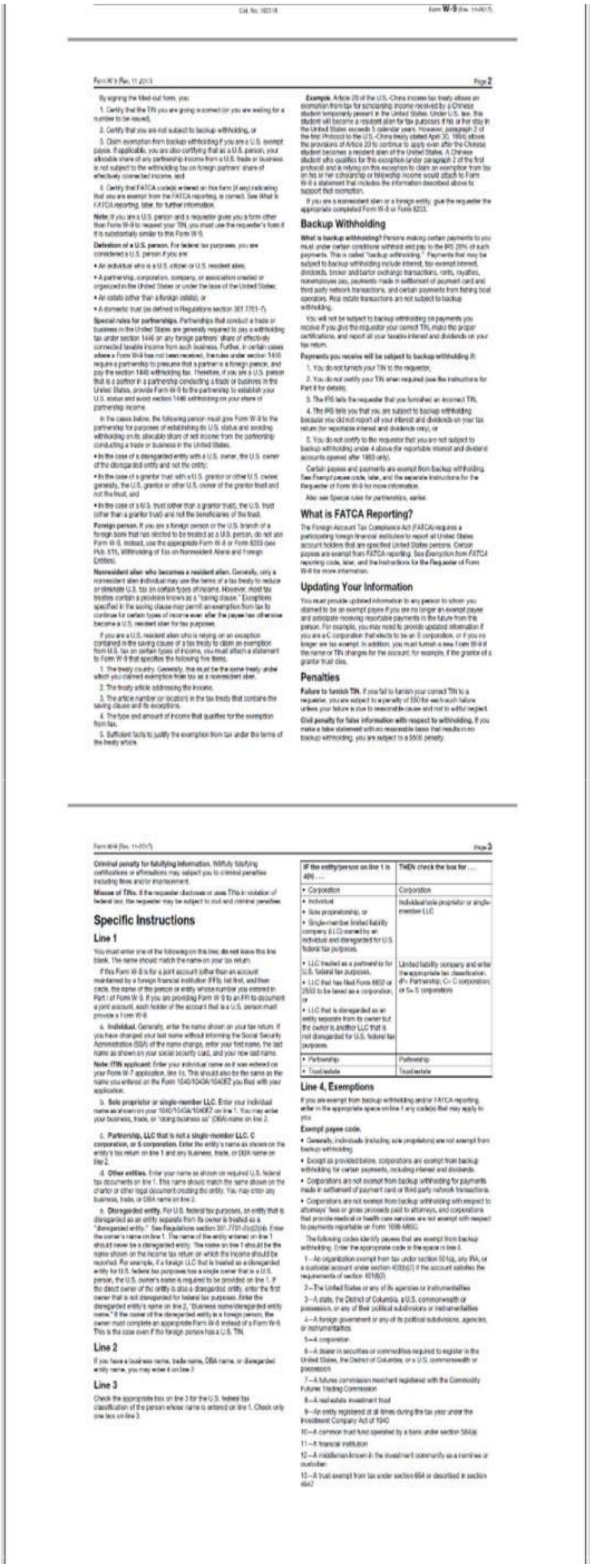
4. From the Update Banking Information screen, select ACH or W9 from the drop down and click submit button.



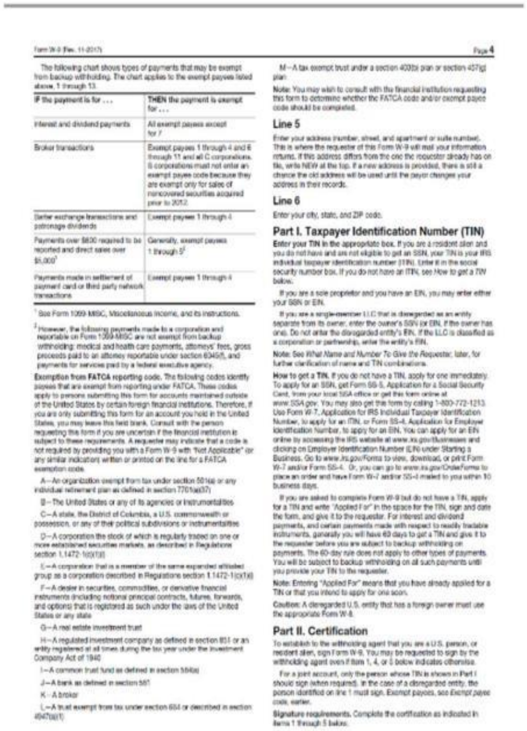
5. Depending on the banking form (W9/ACH) selected, certain fields are required to be completed in order to submit the form. An error message will be displayed if all required fields are not filled in. All fields denoted by an * are required.
6. Click the submit button on the bottom of the form to submit the banking form.

Update Banking Information, *continued*





Update Banking Information, *continued*



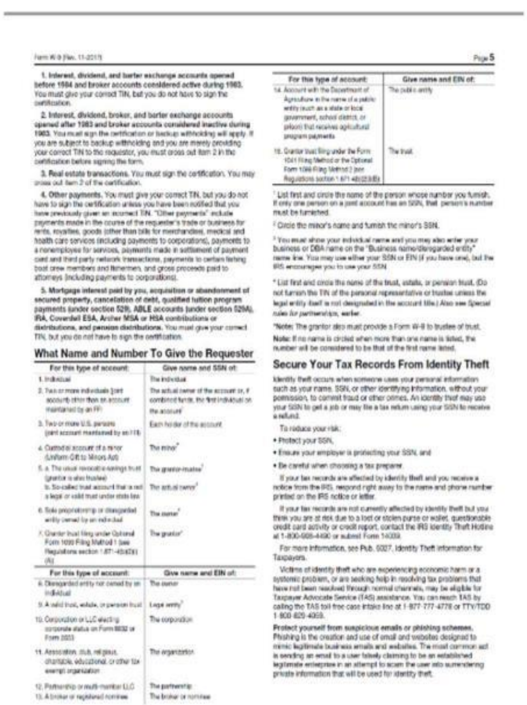
Form W-9 (Rev. 11-2017) Page 4

Line 5

Line 6

Part I. Taxpayer Identification Number (TIN)

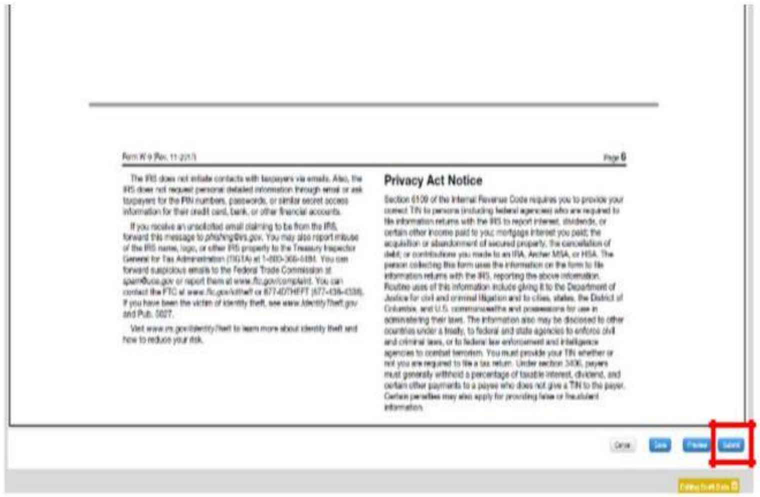
Part II. Certification



Form W-9 (Rev. 11-2017) Page 5

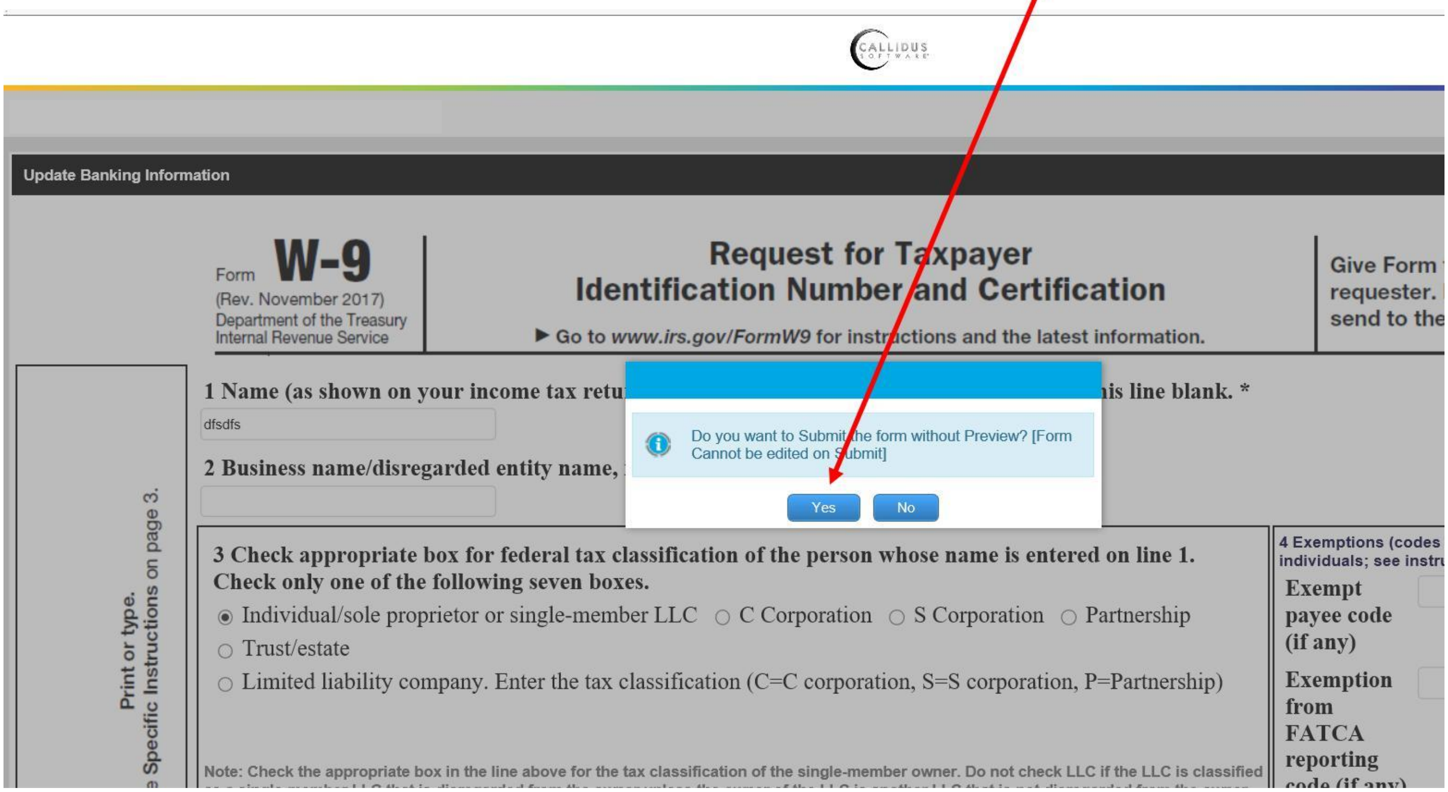
What Name and Number To Give the Requester

Secure Your Tax Records From Identity Theft



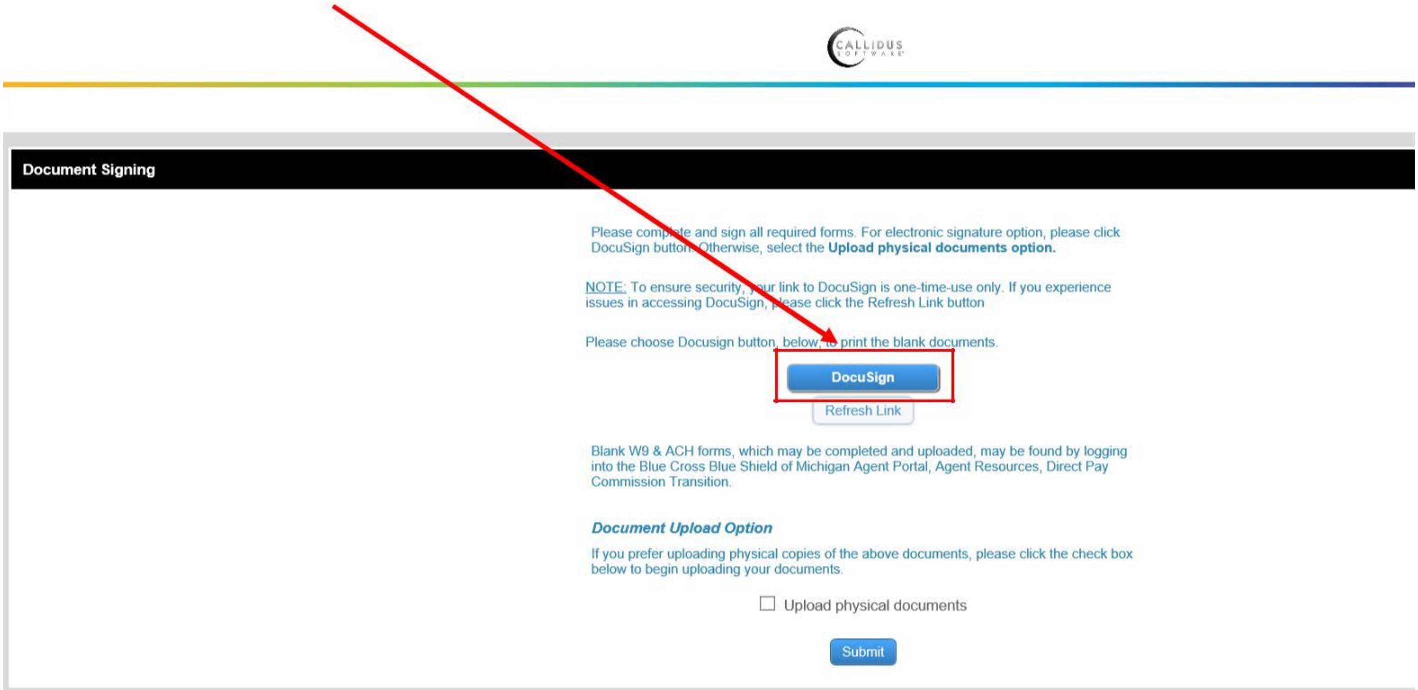
7. You can also click the Save button or Preview button on the bottom of the form to save or preview the information you entered in the form.

8. A pop up box will be displayed upon successful validation and click ‘Yes’ in the pop up box.

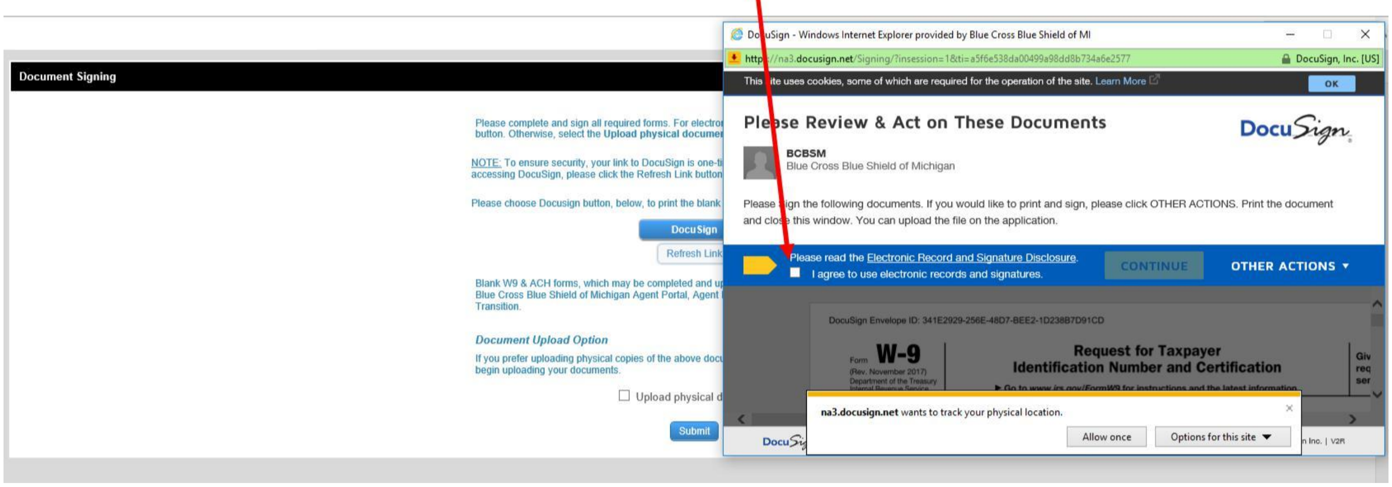


Update Banking Information, *continued*

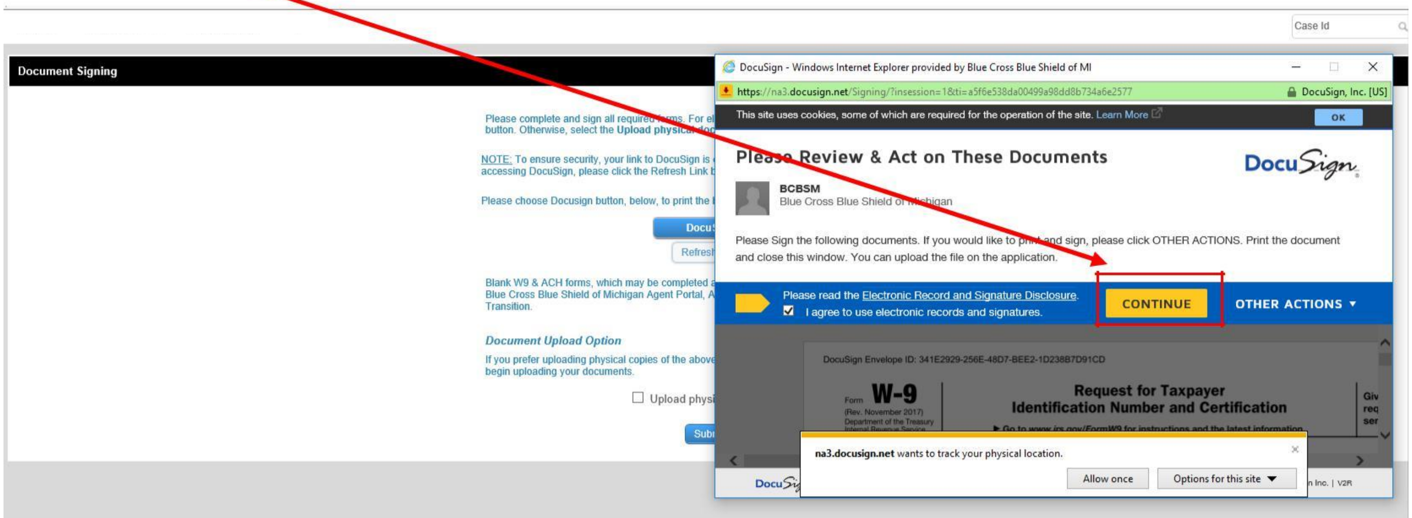
9. Click on the DocuSign button.



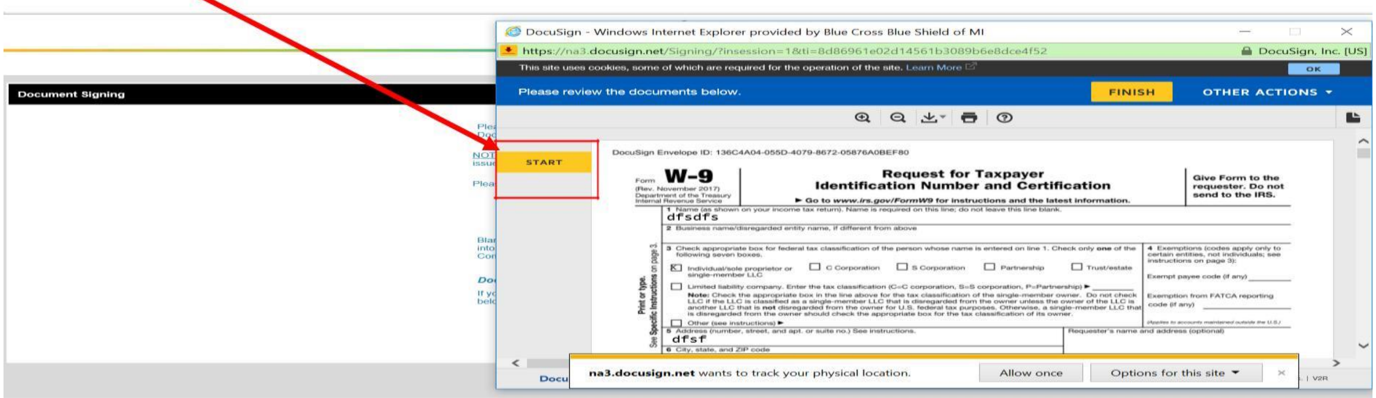
10. Once you are in DocuSign home page, please read the Electronic Record and Signature Disclosure and select the check box that says, 'I agree to use electronic records and signature'. If you prefer to print and sign your form, skip to step 83.



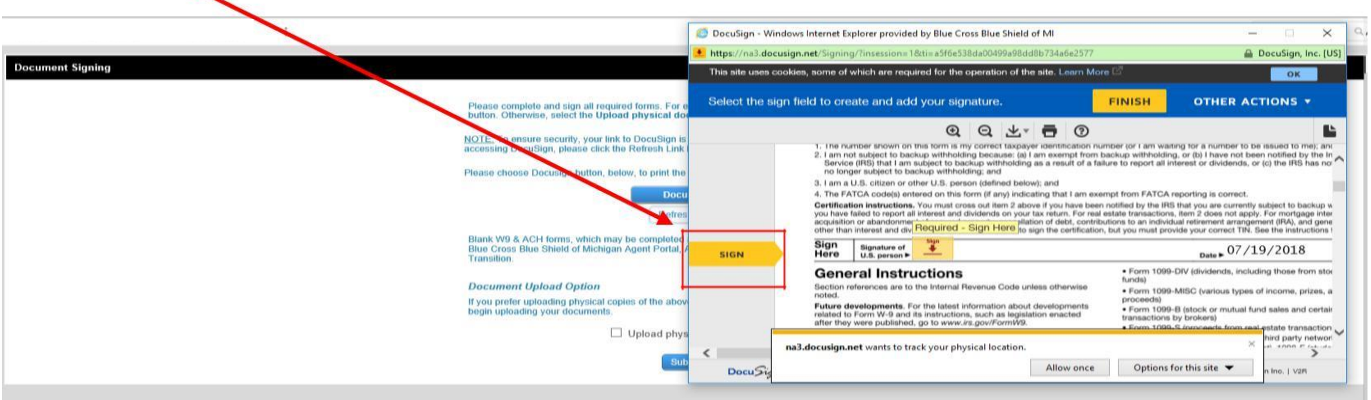
11. Click Continue.



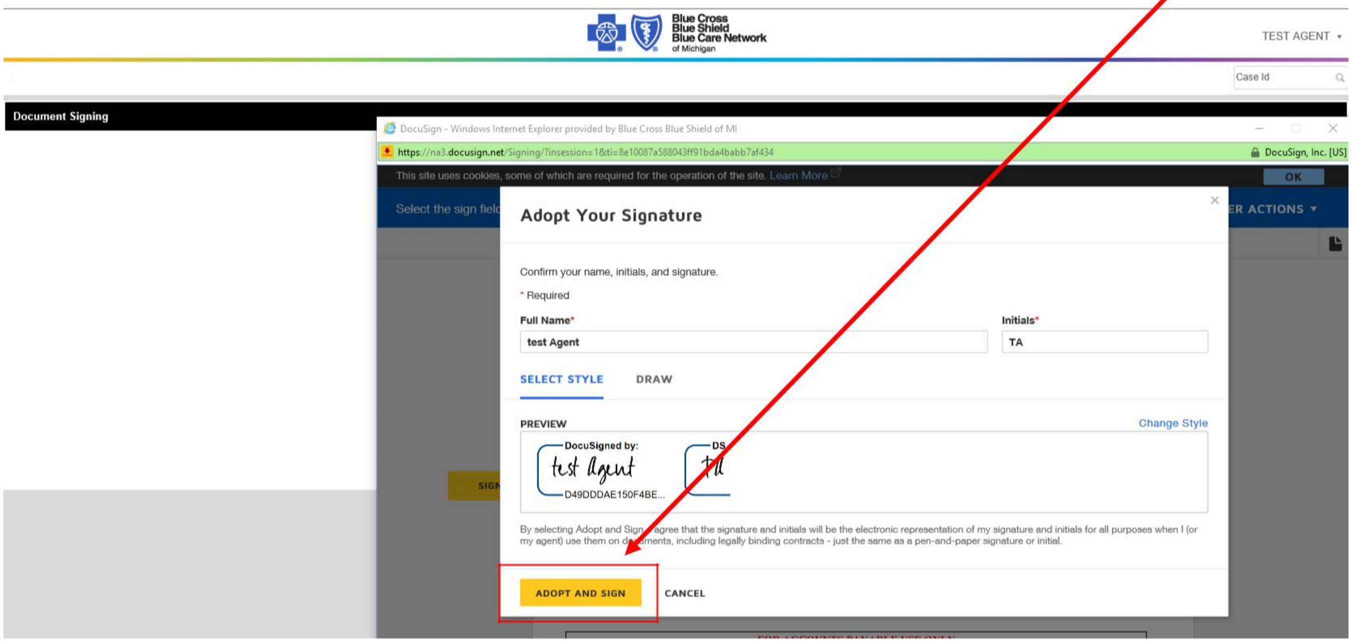
12. Click Start



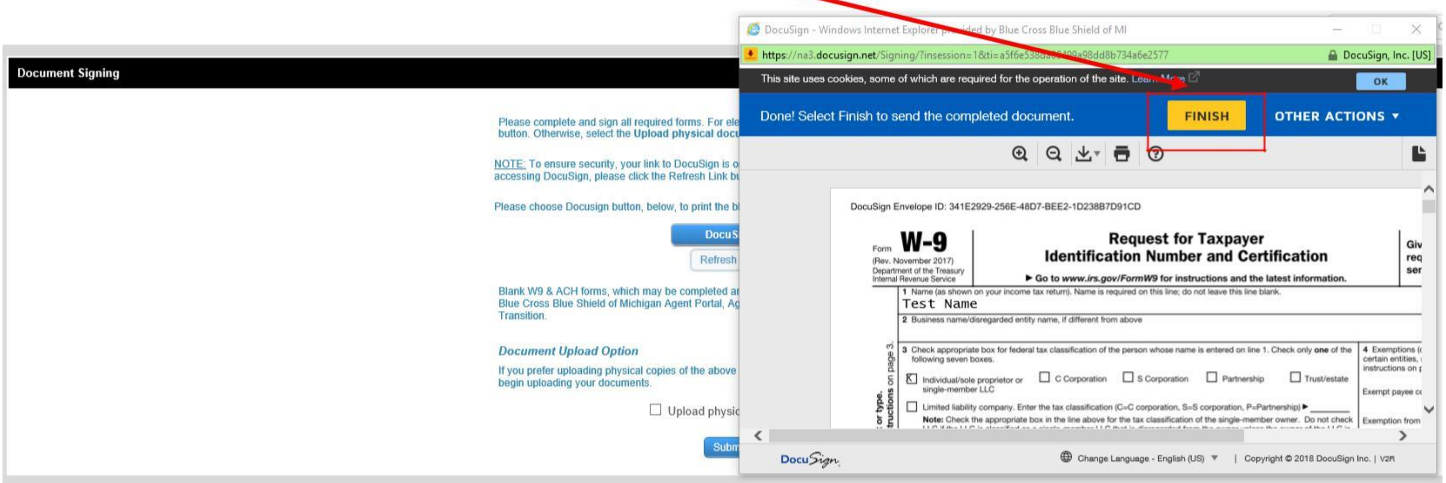
13. Click Sign to electronically sign the form.



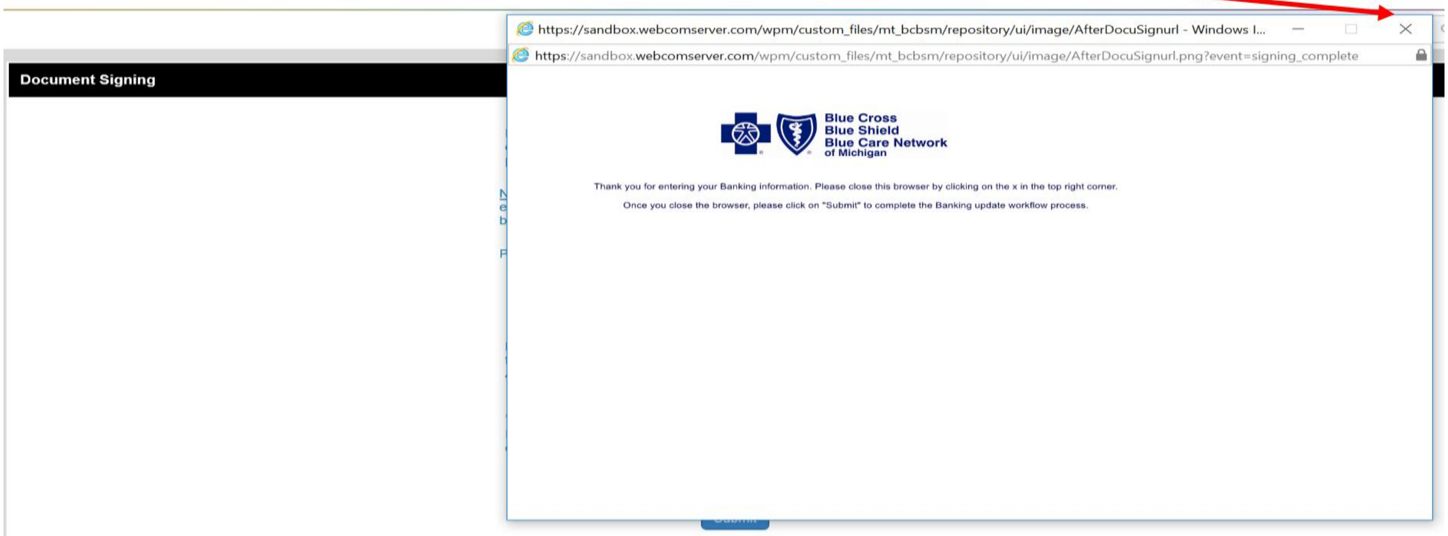
14. Confirm you name, initials and signature in the Adopt Your Signature page and click 'Adopt and Sign' button. (This will only appear for 1st time DocuSign users).



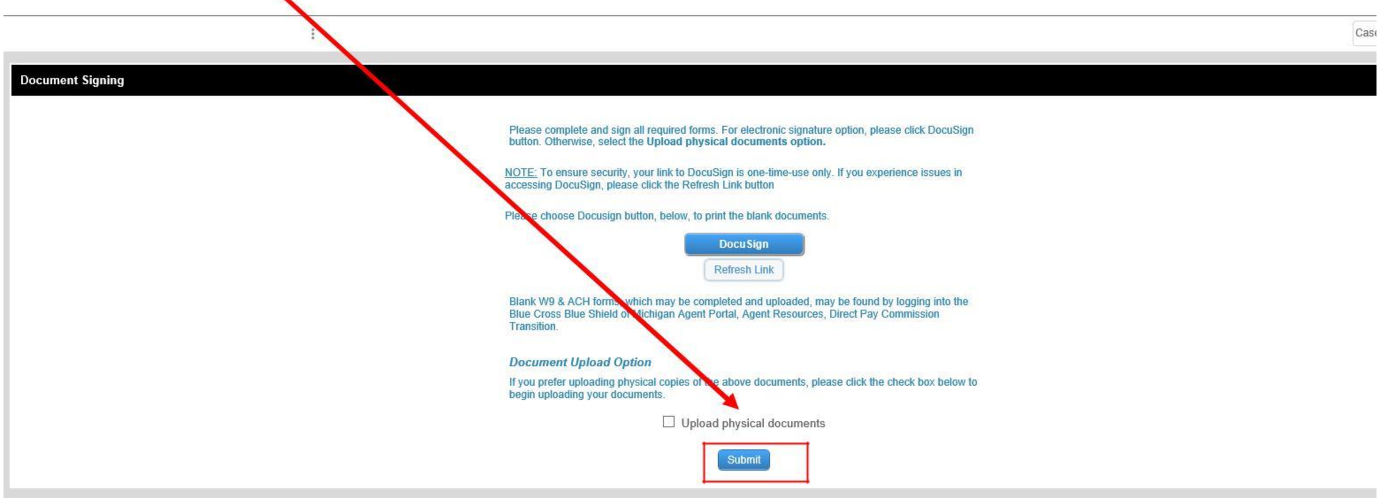
15. Once electronic signature is completed, click Finish button.



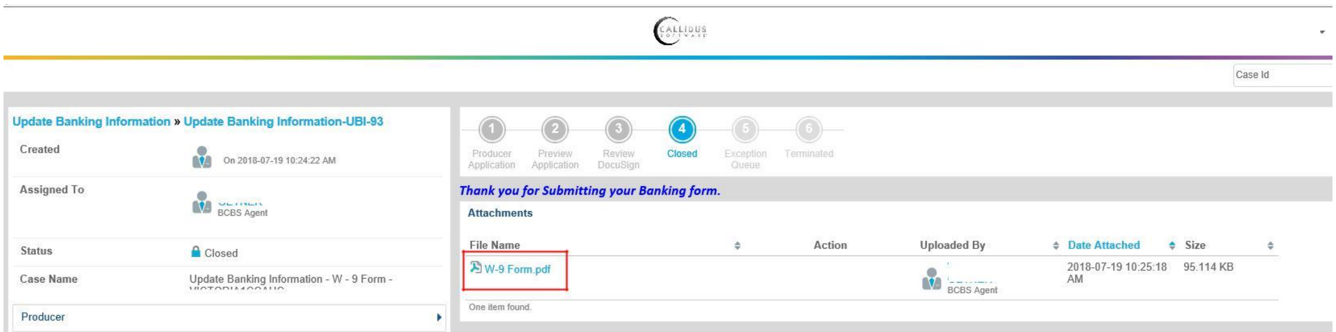
16. Close the browser by clicking on the X in the top right corner.



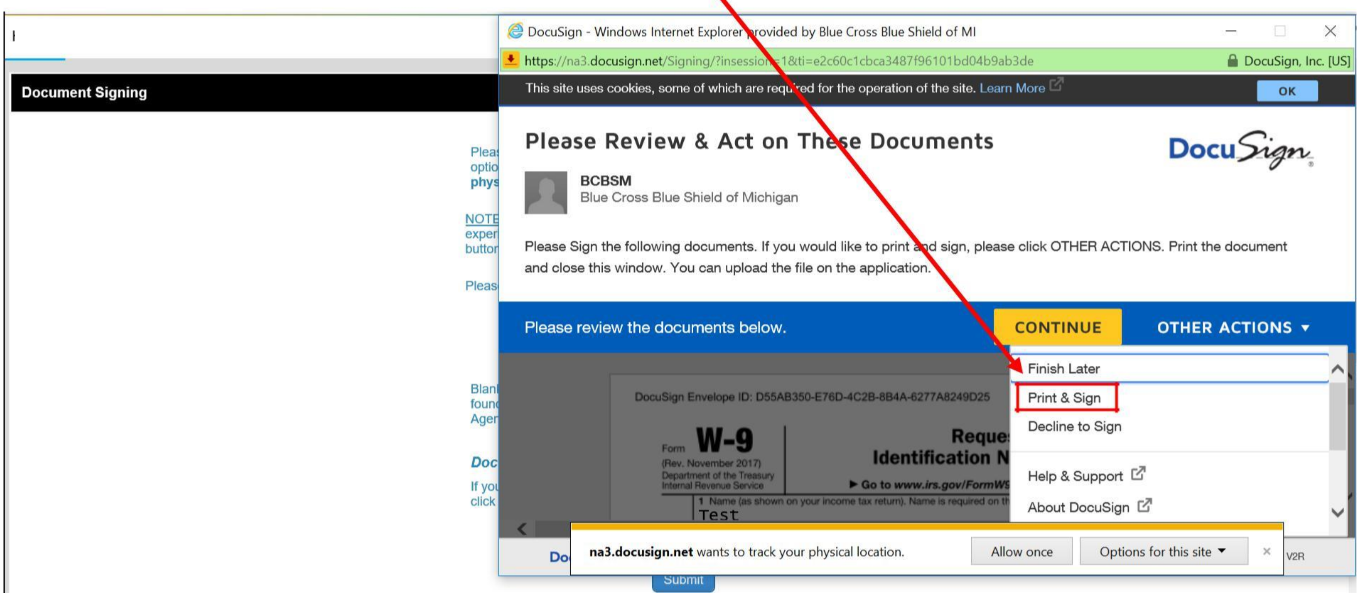
17. Click Submit button on the bottom of the Document Signing page (Once browser is closed, this page will appear).



18. If you wish to see your completed form, click on the below highlighted PDF. At this point, your banking form has been submitted to Blue Cross Blue Shield Michigan for processing.

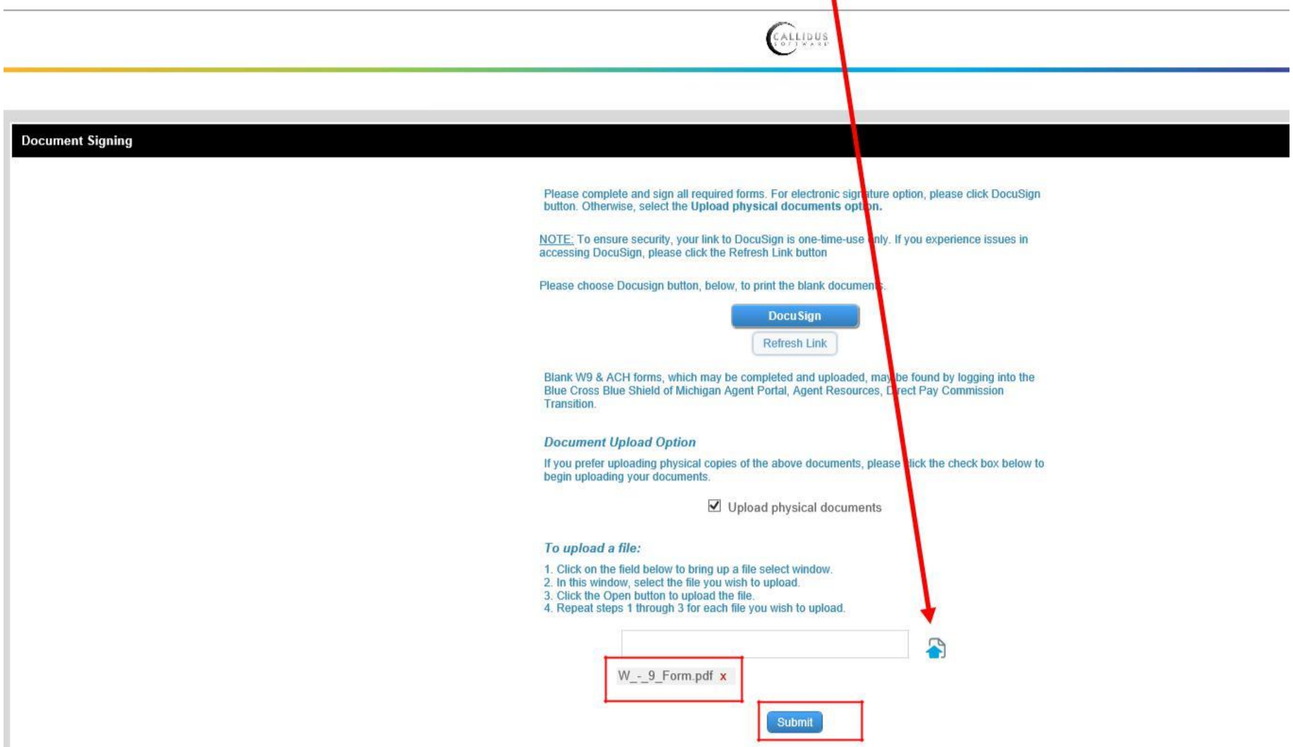


19. If you prefer to print and sign the banking form, select DocuSign button below and click on 'Other Actions' drop down and select the option 'Print and Sign'.



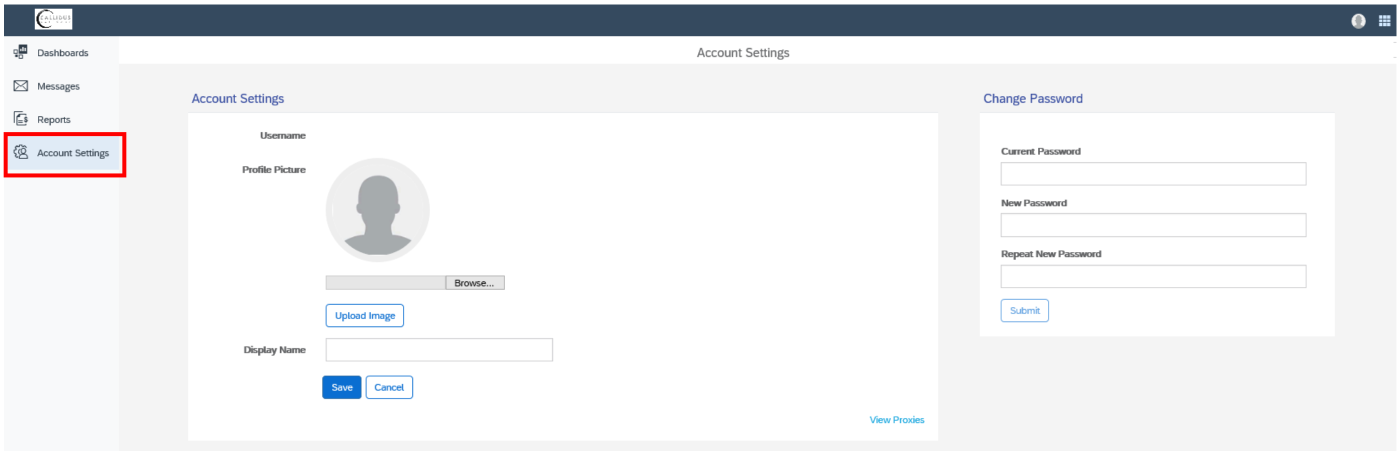
20. After printing the document, sign the completed form, scan and save the form for uploading.

21. Select Upload physical document option and click on the upload icon and select the file to be uploaded and click submit button. At this point, your banking form has been submitted to Blue Cross Blue Shield Michigan for processing.

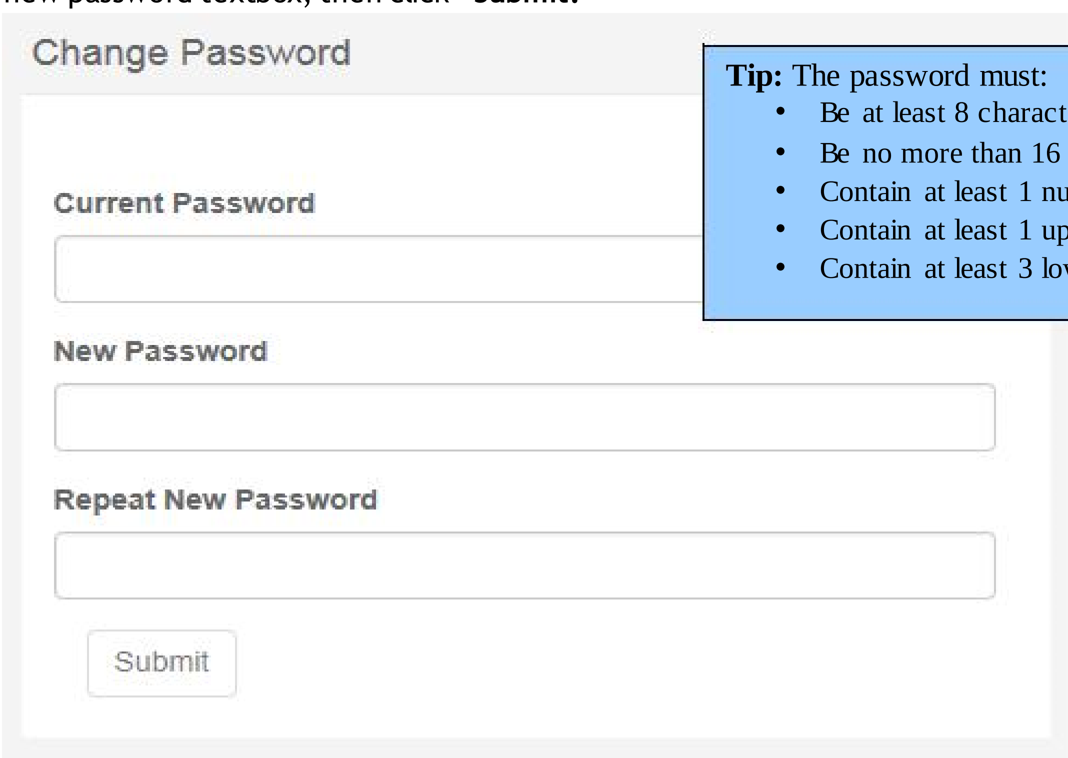


5 Changing Your Password

1. Click the Account Settings menu at the top right of the **Sales Performance Home** screen.



2. Enter your current password, your new password and retype your new password in the repeat new password textbox, then click **"Submit."**



Tip: The password must:

- Be at least 8 characters
- Be no more than 16 characters
- Contain at least 1 numeric character(s)
- Contain at least 1 upper case character(s)
- Contain at least 3 lower case character(s)

Questions

For technical questions, call the Web Support Helpdesk at 1-877—258-3932.