



Blue Cross
Blue Shield
Blue Care Network
of Michigan



Sales Compensation System **AGENCY REPS JOB AID**

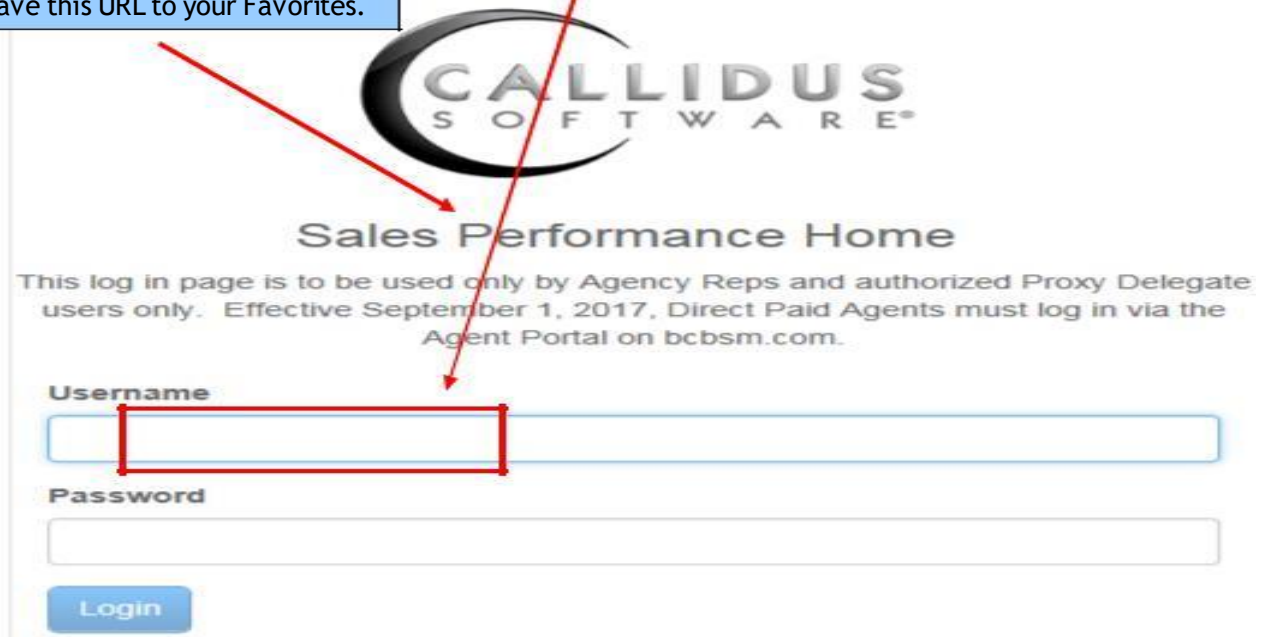
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1 Logging on to Callidus

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.



The image shows the Callidus Software Sales Performance Home login page. At the top is the Callidus Software logo. Below it is the title "Sales Performance Home". A notice states: "This log in page is to be used only by Agency Reps and authorized Proxy Delegate users only. Effective September 1, 2017, Direct Paid Agents must log in via the Agent Portal on bcbsm.com." Below the notice are two input fields: "Username" and "Password". The "Username" field is highlighted with a red rectangle. A blue "Login" button is at the bottom left. Red arrows point from the tip box to the URL, from the tip box to the Username field, and from the second step of the instructions to the Username field.

CALLIDUS
SOFTWARE®

Sales Performance Home

This log in page is to be used only by Agency Reps and authorized Proxy Delegate users only. Effective September 1, 2017, Direct Paid Agents must log in via the Agent Portal on bcbsm.com.

Username

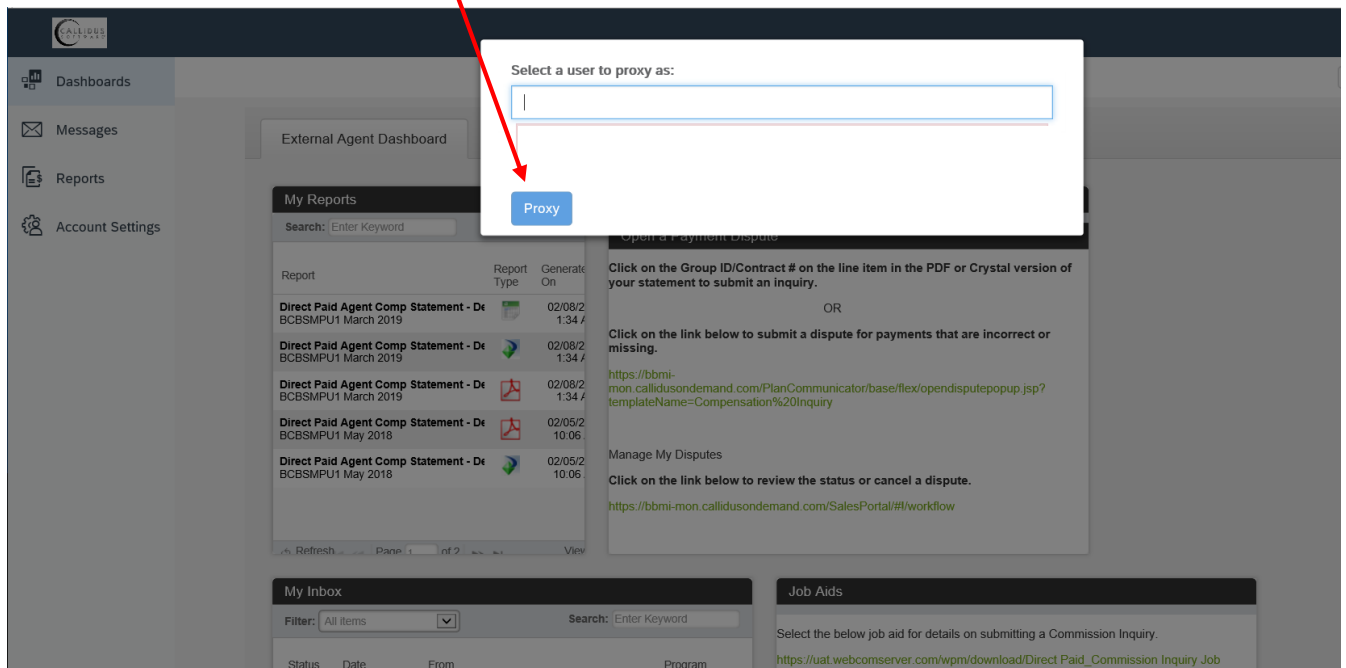
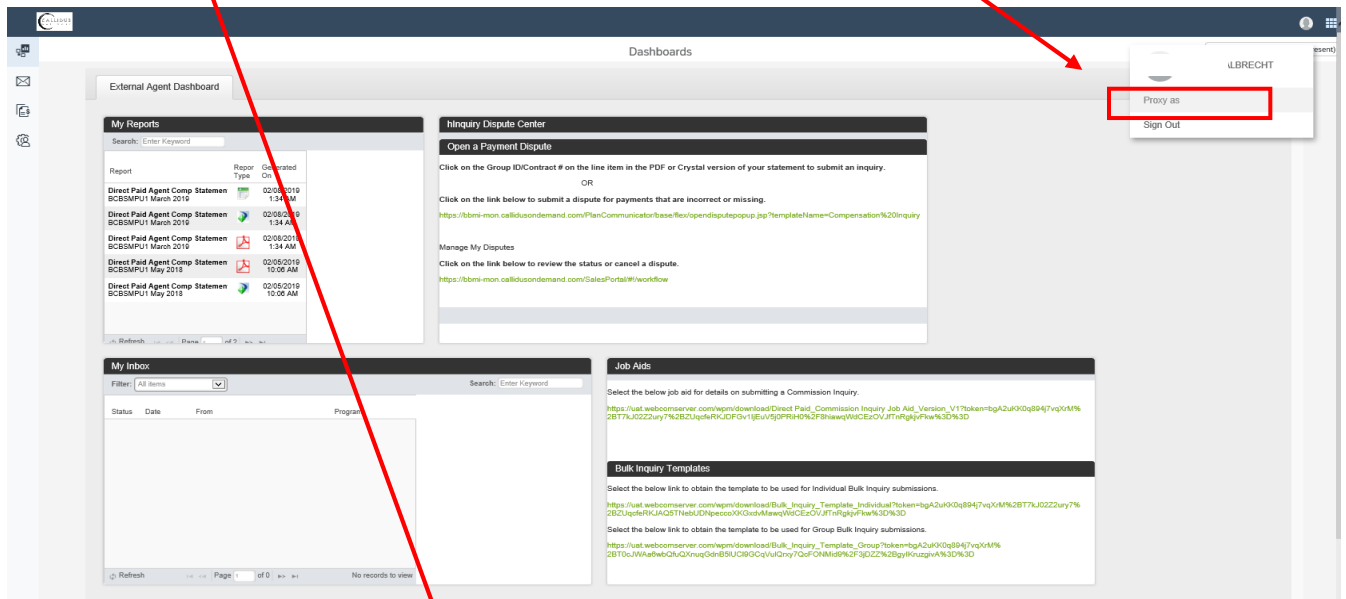
Password

Login

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.

- Open the profile drop-down menu. Click on **Proxy as** and enter few characters of the name to connect.
- 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](#).

The screenshot displays the 'External Agent Dashboard' with a sidebar on the left containing links to Dashboards, Messages, Reports, and Account Settings. The main content area is titled 'Dashboards' and features several panels. The 'My Reports' panel is active, showing a table of reports with columns for Report, Report Type, and Generated On. The table lists several 'Direct Paid Agent Comp Statement - Detail' reports for March 2019 and May 2018, each with a PDF icon and a generated date of 02/08/2016. To the right, the 'Inquiry Dispute Center' panel includes an 'Open a Payment Dispute' section with instructions and a link to submit a dispute. Below this is a 'Manage My Disputes' section with a link to review the status or cancel a dispute. At the bottom right, the 'Job Aids' panel provides links for submitting a Commission Inquiry and Bulk Inquiry Templates.

Report	Report Type	Generated On
Direct Paid Agent Comp Statement - Detail BCBSMPU1 March 2019	PDF	02/08/2016 1:24 AM
Direct Paid Agent Comp Statement - Detail BCBSMPU1 March 2019	Excel	02/08/2016 1:34 AM
Direct Paid Agent Comp Statement - Detail BCBSMPU1 March 2019	Crystal	02/08/2016 1:34 AM
Direct Paid Agent Comp Statement - Detail BCBSMPU1 May 2018	PDF	02/08/2016 10:06 AM
Direct Paid Agent Comp Statement - Detail BCBSMPU1 May 2018	Excel	02/08/2016 10:06 AM

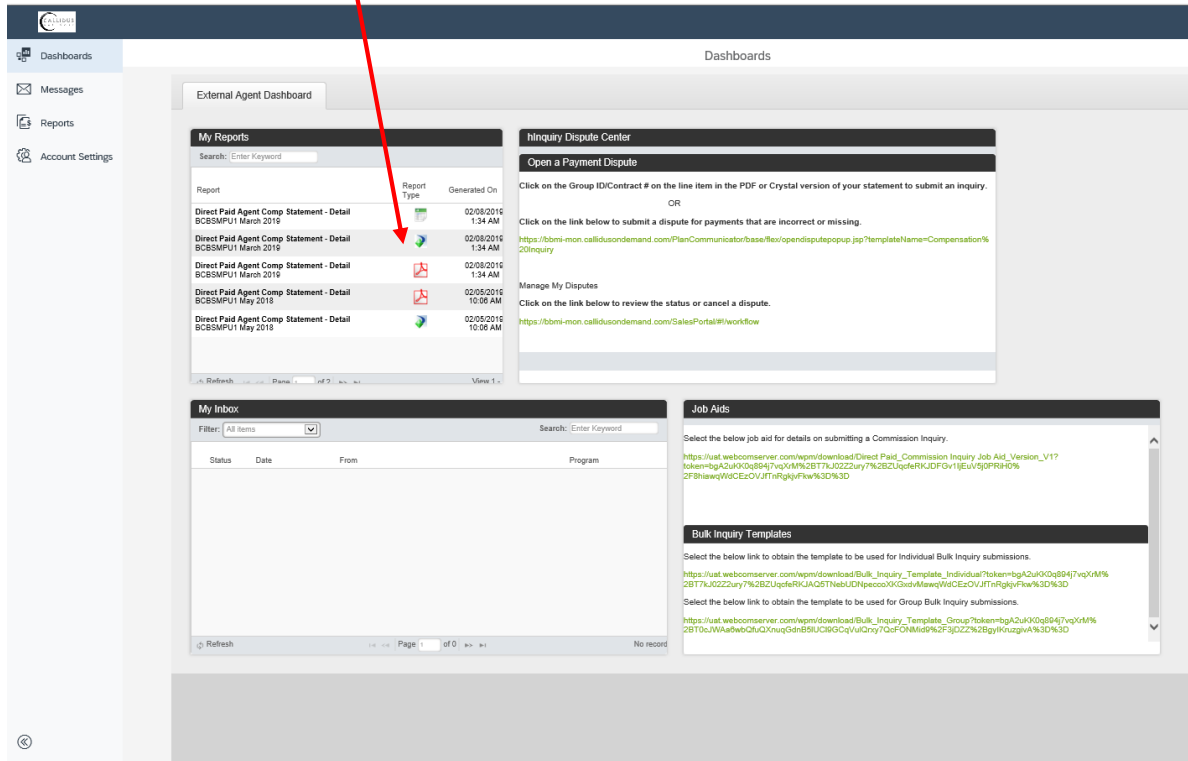
5. In the Sales Performance Home page, recently generated reports are listed under the “My Reports” tab. You will see three types of reports: PDF, Excel and Crystal.

This screenshot is identical to the one above, but with a red rectangular box highlighting the 'Report Type' column in the 'My Reports' table. A red arrow points from the text in step 5 to this box, emphasizing the three types of reports: PDF, Excel, and Crystal.

Report	Report Type	Generated On
Direct Paid Agent Comp Statement - Detail BCBSMPU1 March 2019	PDF	02/08/2016 1:24 AM
Direct Paid Agent Comp Statement - Detail BCBSMPU1 March 2019	Excel	02/08/2016 1:34 AM
Direct Paid Agent Comp Statement - Detail BCBSMPU1 March 2019	Crystal	02/08/2016 1:34 AM
Direct Paid Agent Comp Statement - Detail BCBSMPU1 May 2018	PDF	02/08/2016 10:06 AM
Direct Paid Agent Comp Statement - Detail BCBSMPU1 May 2018	Excel	02/08/2016 10:06 AM

Commission Inquiry Form, *continued*

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



External Agent Dashboard

My Reports

Report	Report Type	Generated On
Direct Paid Agent Comp Statement - Detail BCBSMPUI March 2019		02/08/2016 1:34 AM
Direct Paid Agent Comp Statement - Detail BCBSMPUI March 2019		02/08/2016 1:34 AM
Direct Paid Agent Comp Statement - Detail BCBSMPUI March 2019		02/08/2016 1:34 AM
Direct Paid Agent Comp Statement - Detail BCBSMPUI May 2019		02/08/2016 10:06 AM
Direct Paid Agent Comp Statement - Detail BCBSMPUI May 2019		02/08/2016 10:06 AM

Inquiry Dispute Center

Open a Payment Dispute

Click on the Group ID/Contract # on the line item in the PDF or Crystal version of your statement to submit an inquiry.

OR

Click on the link below to submit a dispute for payments that are incorrect or missing.

<https://bbmi-mon.callidusdemand.com/PlanCommunicator/baseflex/opensdisputepopup.jsp?templateName=Compensation%20Inquiry>

Manage My Disputes

Click on the link below to review the status or cancel a dispute.

<https://bbmi-mon.callidusdemand.com/SalesPortal#/workflow>

My Inbox

Filter: All Items Search: Enter Keyword

Status	Date	From	Program

Job Aids

Select the below job aid for details on submitting a Commission Inquiry.

https://uat.webcomserver.com/wpm/download/Direct_Paid_Commission_Inquiry_Job_Aid_Version_V17?token=bgA2u9Q8e47vqXvM%2B71J02Zury7%2BZUqfeRKJDFGv1JEuV5QPRH0%2F8hewWCECzOVJTrRgkYFw%3D%3D

Bulk Inquiry Templates

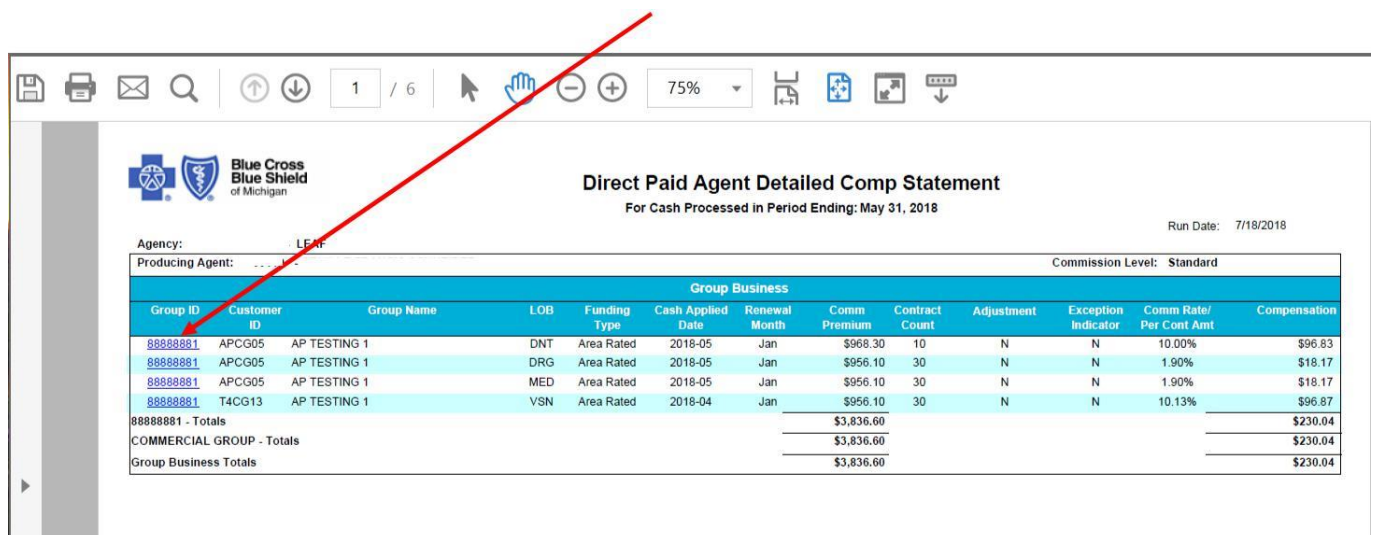
Select the below link to obtain the template to be used for Individual Bulk Inquiry submissions.

https://uat.webcomserver.com/wpm/download/Bulk_Inquiry_Template_Individual?token=bgA2u9Q8e47vqXvM%2B71J02Zury7%2BZUqfeRKJDFGv1JEuV5QPRH0%2F8hewWCECzOVJTrRgkYFw%3D%3D

Select the below link to obtain the template to be used for Group Bulk Inquiry submissions.

https://uat.webcomserver.com/wpm/download/Bulk_Inquiry_Template_Group?token=bgA2u9Q8e47vqXvM%2B71J02Zury7%2BZUqfeRKJDFGv1JEuV5QPRH0%2F8hewWCECzOVJTrRgkYFw%3D%3D

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 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

Commission Inquiry Form, *continued*

- Depending on the segment selected, certain fields are auto populated from the statements into the inquiry form and they are non-editable.
- 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.
- Click the submit button on the bottom of the form to submit the inquiry.

Agency: Blue Cross Blue Shield of Michigan

Producing Agent:

Contract Nbr	Individual Name
123456789	Testing IBU Product
123456789	Testing IBU Product
SBUNEW001	Testing IBU Product1
SBUNEW001	Testing IBU Product1
SBUNEW003	Testing IBU Product1
SBUNEW003	Testing IBU Product1
SBUNEW005	Testing IBU Product1
SBUNEW005	Testing IBU Product1
SBUNEW007	Testing IBU Product1
SBUNEW007	Testing IBU Product1
SBUTU8501	Testing IBU Product1
SBUTU8501	Testing IBU Product1
SBUTU8503	Testing IBU Product1
SBUTU8503	Testing IBU Product1
SBUTU8533	Testing IBU Product1
SBUTU8533	Testing IBU Product1
EBUNEW001	Testing IBU Product1
EBUNEW001	Testing IBU Product1
EBUNEW003	Testing IBU Product1
EBUNEW003	Testing IBU Product1
EBUTU8501	Testing IBU Product1
EBUTU8501	Testing IBU Product1
EBUTU8533	Testing IBU Product1
EBUTU8533	Testing IBU Product1

Commission Inquiry

All required fields as denoted by an * must be filled out

Segment: Commercial Individual

AGENT INFORMATION

MA/GA # _____ Date: 11/17/2017 (YYYY-MM-DD)

Contact Person: TEST AGENT Contact Email: 1234@gmail.com

Agent Name: TEST AGENT Agent ID #: 12345

NPN: _____

SUBSCRIBER INFORMATION

Subscriber Name: Testing IBU Product Deld/ Contract Number: 123456789

Last 4 of SSN: _____ Policy Effective Date (YYYY-MM-DD): _____

Date of Birth (YYYY-MM-DD): _____ Market Place (Y/N) * ☐ Yes ☐ No

Legal Entity: BCBSM Product: Unknown

PROBLEM IDENTIFICATION

Problem Code * --select-- Cash Post Date: 2017-11-01 (YYYY-MM-DD)

Attach file: _____

Additional Comments: _____

Submit

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

Commission Inquiry

All required fields as denoted by an * must be filled out

Segment: Commercial Individual

AGENT INFORMATION

MA/GA # _____ Date: 11/17/2017 (YYYY-MM-DD)

Contact Person: TEST AGENT Contact Email: 1234@gmail.com

Agent Name: TEST AGENT Agent ID #: 12345

NPN: _____

SUBSCRIBER INFORMATION

Subscriber Name: Testing IBU Product Deld/ Contract Number: 123456789

Last 4 of SSN: _____ Policy Effective Date (YYYY-MM-DD): _____

Date of Birth (YYYY-MM-DD): _____ Market Place (Y/N) * ☐ Yes ☐ No

Legal Entity: BCBSM Product: Unknown

PROBLEM IDENTIFICATION

Problem Code * Other Cash Post Date: 2017-11-01 (YYYY-MM-DD)

Attach file: _____

Additional Comments: _____

Submit

Are you sure you want to Submit?

Yes No

Commission Inquiry Form, *continued*

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.

The screenshot shows a web browser window displaying the 'Commission Inquiry-A-2601' case detail page. The status is 'Assigned', highlighted in a red box in the top navigation bar. The left sidebar shows case metadata: Votes (0), Updated (TEST AGENT, 2017-11-17 09:08:24 AM, CST), Created (TEST AGENT, 2017-11-17 09:08:24 AM, CST), Assigned To (TestAnalyst1, Analyst), Case Age (0), and Status (Assigned). The main content area includes a progress bar with steps 1-5, an 'Actions' section with icons for Attach File, Add Comment, Cancel Case, and Edit Case, and a 'Case Tools' icon. Below these are sections for Segment (Commercial Individual), AGENT INFORMATION (MA/GA #, Contact Person, Agent Name, NPN, Date Submitted, Contact Email, Agent ID), SUBSCRIBER INFORMATION (Subscriber Name, Last 4 of SSN, Date of Birth, Legal Entity, Product, Deld/ Contract Number, Policy Effective Date, Market Place), and PROBLEM IDENTIFICATION (Problem Code, Cash Post Date). A 'Related Cases' section at the bottom shows 'Nothing found to display'.

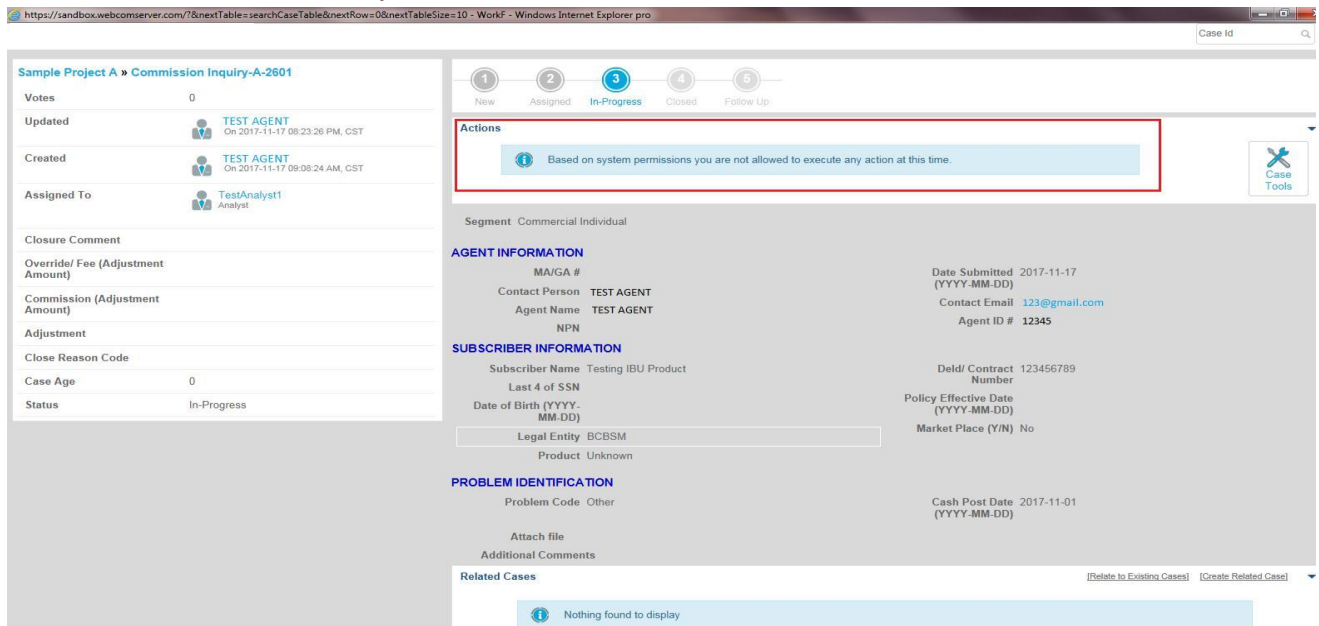
13. The case detail page will show the status of the inquiry. If the case is showing in “Assigned” status, you will still have ability to perform the following 4 actions:

- Attach File
- Add Comment
- Cancel Case
- Edit Case

This screenshot is identical to the one above, but with a red box highlighting the 'Actions' section. The 'Actions' section contains four icons: 'Attach File', 'Add Comment', 'Cancel Case', and 'Edit Case'. The rest of the page, including the sidebar, progress bar, and information sections, remains the same.

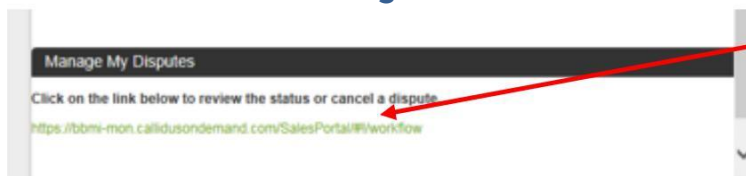
Commission Inquiry Form, *continued*

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

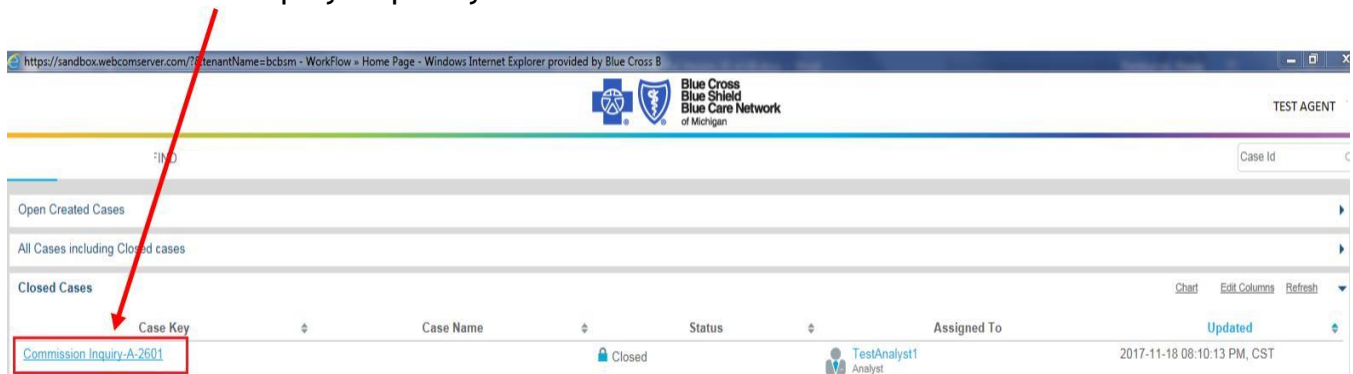


The screenshot shows a web application interface for a Commission Inquiry. The top navigation bar includes a search bar and a 'Case Id' field. The main content area is divided into two sections. On the left, a sidebar displays case details: 'Sample Project A > Commission Inquiry-A-2601', 'Votes: 0', 'Updated: TEST AGENT On 2017-11-17 08:23:26 PM, CST', 'Created: TEST AGENT On 2017-11-17 08:08:24 AM, CST', 'Assigned To: TestAnalyst1 Analyst', 'Closure Comment', 'Override Fee (Adjustment Amount)', 'Commission (Adjustment Amount)', 'Adjustment', 'Close Reason Code', 'Case Age: 0', and 'Status: In-Progress'. On the right, a main panel shows a progress bar with five steps: 'New', 'Assigned', 'In-Progress' (highlighted), 'Closed', and 'Follow Up'. Below the progress bar, an 'Actions' section contains a message: 'Based on system permissions you are not allowed to execute any action at this time.' The main panel also displays 'AGENT INFORMATION' (MA/GA #, Contact Person, Agent Name, NPN), 'SUBSCRIBER INFORMATION' (Subscriber Name, Last 4 of SSN, Date of Birth, Legal Entity, Product), and 'PROBLEM IDENTIFICATION' (Problem Code, Attach file, Additional Comments). A 'Related Cases' section at the bottom shows a message: 'Nothing found to display'.

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.



The screenshot shows a web application interface for 'Closed Cases'. The top navigation bar includes a search bar and a 'Case Id' field. The main content area displays a table with the following columns: 'Case Key', 'Case Name', 'Status', 'Assigned To', and 'Updated'. The table contains one row with the following data: 'Commission Inquiry-A-2601', 'Closed', 'TestAnalyst1 Analyst', and '2017-11-18 08:10:13 PM, CST'. A red arrow points from the 'Case Key' column header to the 'Commission Inquiry-A-2601' value.

Case Key	Case Name	Status	Assigned To	Updated
Commission Inquiry-A-2601		Closed	TestAnalyst1 Analyst	2017-11-18 08:10:13 PM, CST

Commission Inquiry Form, *continued*

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

The screenshot shows a web application interface for a Commission Inquiry. On the left, a sidebar contains metadata for 'Sample Project A » Commission Inquiry-A-2523', including votes, update history, creation date, closing date, assigned analyst, and status (Closed). The main content area has a progress bar at the top with steps: New, Assigned, In-Progress, Closed (selected), and Follow Up. Below the progress bar are 'Actions' (Attach File, Follow Up) and a 'Case Tools' icon. The form is divided into sections: 'AGENT INFORMATION' (MA/GA #, Contact Person, Agent Name, NPN, Date Submitted, Contact Email, Agent ID), 'GROUP INFORMATION' (Group Suffix(es), CID, Facets Id#, Legal Entity, Rating, Group Name, MTV #, LOB), and 'PROBLEM IDENTIFICATION' (Problem Code, Cash Post Date). The 'PROBLEM RESOLUTION' section is highlighted with a red box and a red arrow pointing to it. It contains an 'Attach file' button, 'Additional Comments', and a list of attachments including 'Problem Resolution Attachment.docx'. The resolution text states: 'Commission amount approved. Please refer document for more details.' At the bottom, there are links for 'Related Cases', 'Relate to Existing Cases', and 'Create Related Case'.

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

This screenshot is similar to the previous one, but with a red arrow pointing to the attachment icon in the 'PROBLEM RESOLUTION' section. The attachment is 'Problem Resolution Attachment.docx'. The rest of the form, including the sidebar, progress bar, and other sections, remains the same.

Commission Inquiry Form, *continued*

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)

The screenshot shows a web browser window displaying the 'Commission Inquiry-A-2601' form. The form is titled 'Sample Project A » Commission Inquiry-A-2601'. On the left, there is a sidebar with fields: 'Votes' (0), 'Updated' (TestAnalyst1, On 2017-11-18 08:10:13 PM, CST), 'Created' (TEST AGENT, On 2017-11-17 09:08:24 AM, CST), 'Closing Date' (2017-11-18), 'Assigned To' (TestAnalyst1 Analyst), and 'Status' (Closed). The main content area has a progress bar with five steps: 1. New, 2. Assigned, 3. In-Progress, 4. Closed, and 5. Follow Up. The 'Follow Up' step is selected. Below the progress bar, there are two action buttons: 'Attach File' and 'Follow Up'. The 'Follow Up' button is highlighted with a red box. Below these buttons, there is a 'Follow Up' section with a 'Comment' field. The comment text is 'I am following up regarding commission amount for June 2017'. There is a 'Submit' button at the bottom right.

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

The screenshot shows the same web browser window displaying the 'Commission Inquiry-A-2601' form. The progress bar and sidebar are the same. In the 'Actions' section, the 'Attach File' button is highlighted with a red box. Below the 'Actions' section, there is a 'File Upload' section. It has a 'File Name' field, which is also highlighted with a red box, and a file upload icon. Below the 'File Name' field, there is a 'Comment' field. The comment text is 'I am following up regarding commission amount for June 2017'. There is a checkbox labeled 'follow this case' which is checked. Below the comment field, there is a 'Notifications' dropdown menu. There is an 'Upload' button at the bottom right.

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

Commission Inquiry Form, *continued*

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.

The screenshot displays a web application interface for a 'Commission Inquiry-A-2601'. The top navigation bar shows a progress indicator with five steps: 1. New, 2. Assigned, 3. In-Progress, 4. Closed, and 5. Follow Up (highlighted). The left sidebar contains a 'Status' dropdown menu with a 'Follow Up' option selected. The main content area is divided into several sections: 'AGENT INFORMATION' (MA/GA #, Contact Person, Agent Name, NPN), 'SUBSCRIBER INFORMATION' (Subscriber Name, Last 4 of SSN, Date of Birth, Legal Entity, Product), 'PROBLEM IDENTIFICATION' (Problem Code, Attach file, Additional Comments), and 'PROBLEM RESOLUTION' (Attachment, Resolution). A message box at the top of the main content area states: 'Based on system permissions you are not allowed to execute any action at this time.' The bottom section shows 'Related Cases' (Nothing found to display) and 'Comments' (A comment from KARL W ALBRECHT dated 2017-11-18 08:37:16 PM, CST).

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](#).



Commission Inquiry Form, *continued*

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

The screenshot displays the 'Commission Inquiry-A-2601' form. On the left, a sidebar shows case details: 'Votes: 0', 'Updated: TEST ANALYST2 (2017-11-20 09:26:19 AM, CST)', 'Created: TEST AGENT (2017-11-20 09:18:50 AM, CST)', 'Closing Date: 2017-11-20', 'Assigned To: TEST ANALYST2 Analyst', and 'Status: Closed'. The main area has a progress bar with steps: New, Assigned, In Progress, Closed, and Follow Up. Below this is an 'Actions' section with 'Attach File' and 'Follow Up' icons. The form is divided into sections: 'AGENT INFORMATION' (MA/IGA #, Contact Person, Agent Name, NPN, Date Submitted, Contact Email, Agent ID), 'SUBSCRIBER INFORMATION' (Subscriber Name, Last 4 of SSN, Date of Birth, Legal Entity, Product, Deld/ Contract Number, Policy Effective Date, Market Place), 'PROBLEM IDENTIFICATION' (Problem Code, Attach file, Additional Comments), 'PROBLEM RESOLUTION' (Attachment, Resolution), and 'Related Cases' (Nothing found to display). The 'Comments' section at the bottom shows two entries: one from 'TEST ANALYST2' dated 2017-11-20 09:26:19 AM, CST, stating 'Commission amount for July 2017 approved.', and another from 'TEST AGENT' dated 2017-11-20 09:24:08 AM, CST, stating 'I am following up regarding commission payment for July 2017.' The first comment is highlighted with a red box.

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.

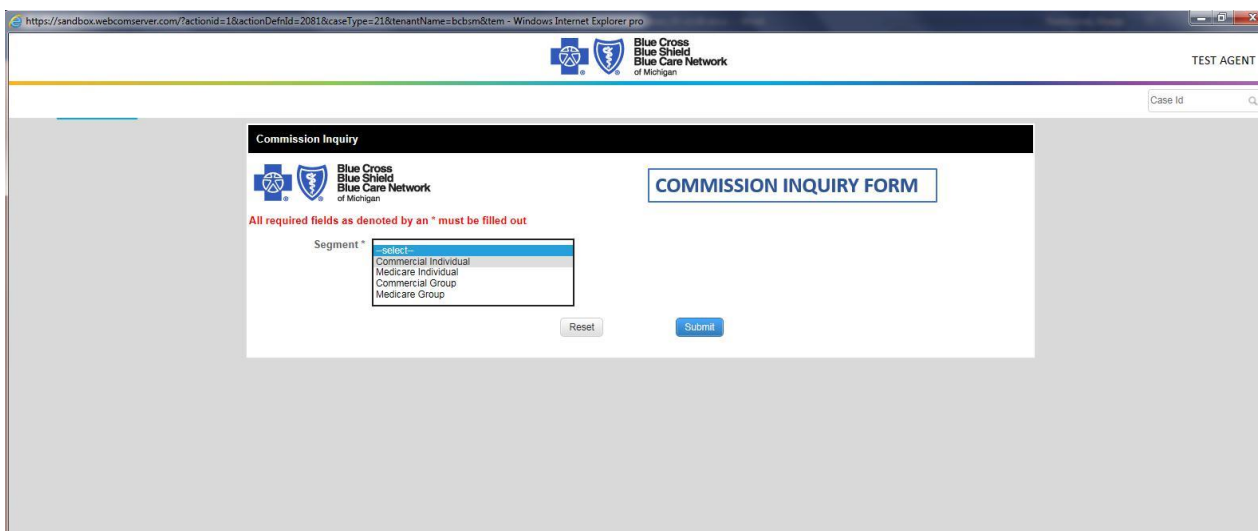
This screenshot shows the same 'Commission Inquiry-A-2601' form, but with the 'Actions' section highlighted by a red box. The 'Follow Up' icon is visible, indicating the system's functionality to re-follow up on the inquiry after it has been closed.

Commission Inquiry Form, *continued*

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.



https://sandbox.webcomserver.com/?actionid=1&actionDefId=2081&caseType=21&tenantName=bcbm&stem - Windows Internet Explorer pro

Blue Cross Blue Shield of Michigan

TEST AGENT

Case Id

Commission Inquiry

Blue Cross Blue Shield of Michigan

COMMISSION INQUIRY FORM

All required fields as denoted by an * must be filled out

Segment *

select--
Commercial Individual
Medicare Individual
Commercial Group
Medicare Group

Reset Submit

Commission Inquiry Form, *continued*

27. Depending on the segment selected, certain fields are auto populated into the inquiry form and they are non-editable.
28. 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.
29. Click the submit button on the bottom of the form to submit the inquiry.

https://sandbox.webcomserver.com/?actionid=1&actionDefId=2081&caseType=21&tenantName=bcbstm8tem - Windows Internet Explorer pro

Commission Inquiry



COMMISSION INQUIRY FORM

All required fields as denoted by an * must be filled out

Segment *

AGENT INFORMATION

MA/GA #

Contact Person TEST AGENT

Agent Name *

NPN

Date Submitted 2017-11-20
(YYYY-MM-DD)

Contact Email 123@gmail.com

Agent ID # *

SUBSCRIBER INFORMATION

Subscriber Name *

Last 4 of SSN

Date of Birth (YYYY-MM-DD)

Legal Entity * --select--

Product * --select--

Deld/ Contract Number

Policy Effective Date (YYYY-MM-DD)

Market Place (Y/N) * ☐ Yes ☐ No

PROBLEM IDENTIFICATION

Problem Code * --select--

Cash Post Date (YYYY-MM-DD)

Attach file

Additional Comments

Reset

Submit

Commission Inquiry Form, *continued*

30. Upon successfully submitting the form, the case will be moved to Assigned status and you will 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.

The screenshot shows the 'Commission Inquiry-A-2601' form. The status is 'Assigned', indicated by a red box around the '2' in the progress bar. The 'Actions' section is highlighted with a red box, showing four options: 'Attach File', 'Add Comment', 'Cancel Case', and 'Edit Case'. The form includes sections for 'AGENT INFORMATION', 'SUBSCRIBER INFORMATION', and 'PROBLEM IDENTIFICATION'. The 'AGENT INFORMATION' section includes fields for MA/GA #, Contact Person, Agent Name, and NPN. The 'SUBSCRIBER INFORMATION' section includes fields for Subscriber Name, Last 4 of SSN, Date of Birth, Legal Entity, and Product. The 'PROBLEM IDENTIFICATION' section includes fields for Problem Code, Attach file, and Additional Comments. The 'Related Cases' section at the bottom shows 'Nothing found to display'.

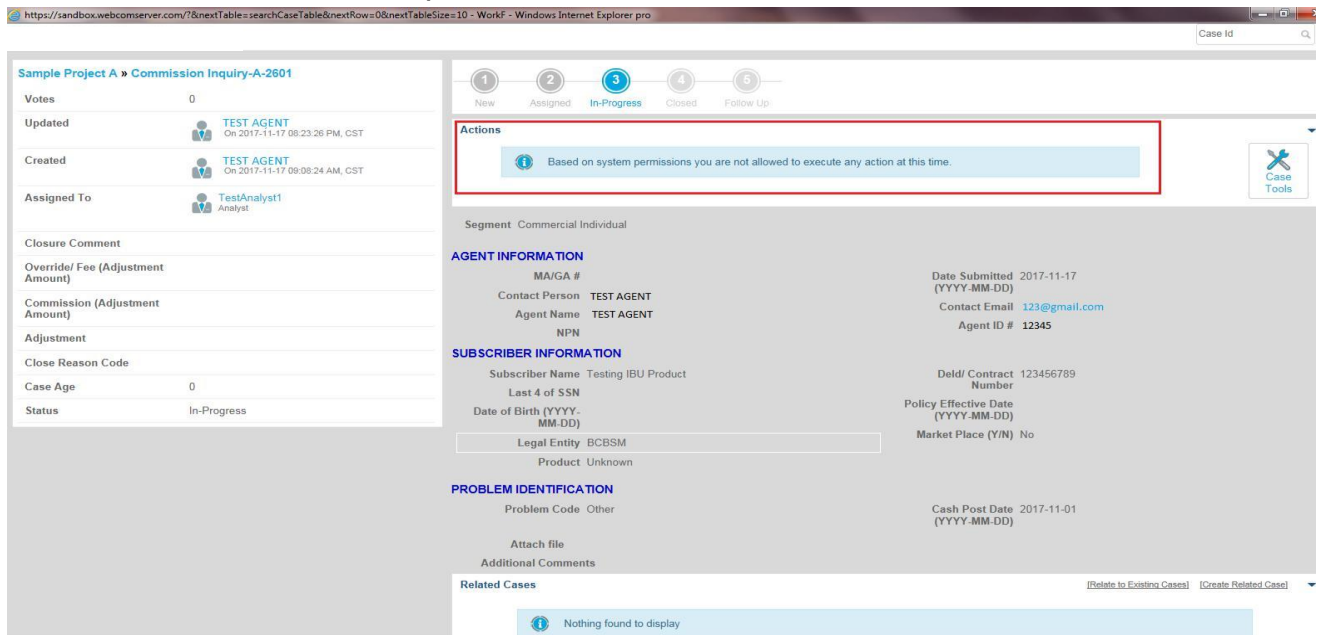
31. The case detail page will show the status of the inquiry. If the case is showing in “Assigned” status, you will still have ability to perform the following 4 actions:

- Attach File
- Add Comment
- Cancel Case
- Edit Case

This screenshot is identical to the one above, showing the 'Commission Inquiry-A-2601' form in the 'Assigned' status. The 'Actions' section is highlighted with a red box, showing four options: 'Attach File', 'Add Comment', 'Cancel Case', and 'Edit Case'. The form includes sections for 'AGENT INFORMATION', 'SUBSCRIBER INFORMATION', and 'PROBLEM IDENTIFICATION'. The 'AGENT INFORMATION' section includes fields for MA/GA #, Contact Person, Agent Name, and NPN. The 'SUBSCRIBER INFORMATION' section includes fields for Subscriber Name, Last 4 of SSN, Date of Birth, Legal Entity, and Product. The 'PROBLEM IDENTIFICATION' section includes fields for Problem Code, Attach file, and Additional Comments. The 'Related Cases' section at the bottom shows 'Nothing found to display'.

Commission Inquiry Form, *continued*

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

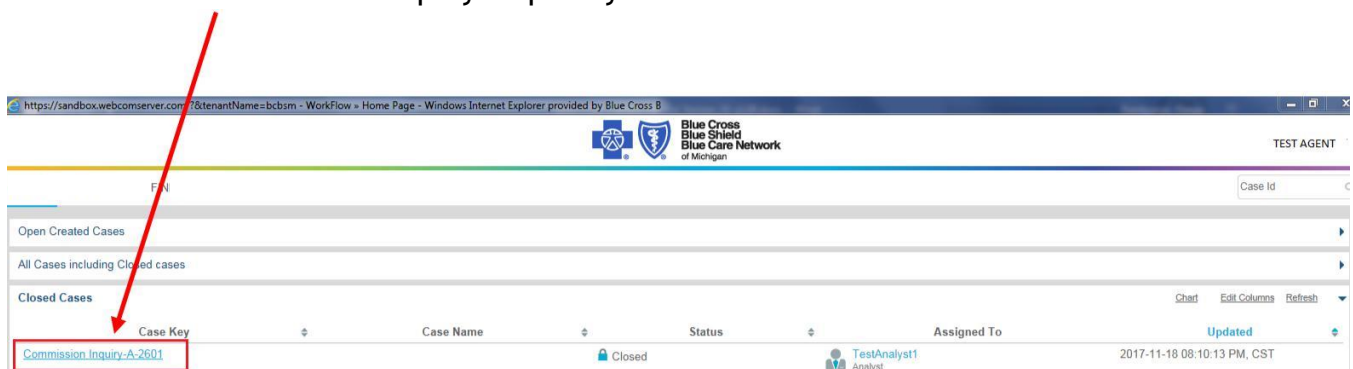


The screenshot shows a web application interface for a Commission Inquiry. The top navigation bar includes a search bar and a 'Case Id' field. The main content area is divided into two sections. On the left, a sidebar contains a 'Sample Project A' header and a 'Commission Inquiry-A-2601' title. Below this, a 'Votes' section shows 0 votes. A 'Created' section shows the case was created on 2017-11-17 08:23:26 PM, CST, by TEST AGENT. An 'Assigned To' section shows the case is assigned to TestAnalyst1, Analyst. A 'Closure Comment' section is empty. A 'Override Fee (Adjustment Amount)' section shows 0. A 'Commission (Adjustment Amount)' section shows 0. An 'Adjustment' section shows 0. A 'Close Reason Code' section shows 0. A 'Case Age' section shows 0. A 'Status' section shows 'In-Progress'. On the right, a 'Segment' section shows 'Commercial Individual'. Below this, an 'AGENT INFORMATION' section shows 'MA/GA #', 'Contact Person', 'Agent Name', and 'NPN'. A 'SUBSCRIBER INFORMATION' section shows 'Subscriber Name', 'Last 4 of SSN', 'Date of Birth (YYYY-MM-DD)', 'Legal Entity', and 'Product'. A 'PROBLEM IDENTIFICATION' section shows 'Problem Code' and 'Other'. A 'Related Cases' section shows 'Nothing found to display'. A red box highlights a message: 'Based on system permissions you are not allowed to execute any action at this time.'

33. 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. 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](#).



34. 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.



The screenshot shows a table titled 'Closed Cases' with columns: Case Key, Case Name, Status, Assigned To, and Updated. The table contains one row with the following data: Case Key: Commission Inquiry-A-2601, Case Name: (empty), Status: Closed, Assigned To: TestAnalyst1 Analyst, Updated: 2017-11-18 08:10:13 PM, CST. A red arrow points from the 'Case Key' column header to the 'Commission Inquiry-A-2601' value.

Case Key	Case Name	Status	Assigned To	Updated
Commission Inquiry-A-2601		Closed	TestAnalyst1 Analyst	2017-11-18 08:10:13 PM, CST

Commission Inquiry Form, *continued*

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

The screenshot shows a web application interface for a Commission Inquiry. The left sidebar contains metadata for 'Sample Project A » Commission Inquiry-A-2523', including votes, update history, creation date, closing date, assigned analyst, and status (Closed). The main content area has a progress bar at the top with steps: New, Assigned, In-Progress, Closed (selected), and Follow Up. Below the progress bar are 'Actions' (Attach File, Follow Up) and 'Case Tools'. The form is divided into sections: AGENT INFORMATION (MA/GA #, Contact Person, Agent Name, NPN), GROUP INFORMATION (Group Suffix(es), CID, Facets Id#, Legal Entity, Rating), PROBLEM IDENTIFICATION (Problem Code, Attach file, Additional Comments), and PROBLEM RESOLUTION (Attachment, Resolution). The 'PROBLEM RESOLUTION' section is highlighted with a red box, and a red arrow points to the 'Attachment' link, which is labeled 'Problem_Resolution_Attachment.docx'. The 'Resolution' text below it states 'Commission amount approved. Please refer document for more details.' At the bottom right, there are links for '(Relate to Existing Cases)' and '(Create Related Case)'.

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

This screenshot is identical to the one above, showing the same web application interface. However, in this view, a red box highlights the attachment icon (a small document with a plus sign) next to the 'Attachment' link in the 'PROBLEM RESOLUTION' section. A red arrow points from the text in step 36 to this icon. The rest of the interface, including the sidebar, progress bar, and other form sections, remains the same.

Commission Inquiry Form, *continued*

37. 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)

The screenshot shows a web application interface for a 'Commission Inquiry-A-2601'. On the left, a sidebar displays case details: Votes (0), Updated (TestAnalyst1 on 2017-11-18 08:10:13 PM, CST), Created (TEST AGENT on 2017-11-17 09:08:24 AM, CST), Closing Date (2017-11-18), Assigned To (TestAnalyst1 Analyst), and Status (Closed). The main area features a progress bar with five steps: New, Assigned, In-Progress, Closed, and Follow Up. The 'Follow Up' step is highlighted. Below the progress bar, the 'Actions' section shows 'Attach File' and 'Follow Up' icons, with 'Follow Up' selected and highlighted by a red box. A 'Case Tools' icon is also visible. A 'Follow Up' modal window is open, containing a text area with the comment 'I am following up regarding commission amount for June 2017' and a 'Submit' button at the bottom.

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

The screenshot shows the same web application interface, but with the 'Attach File' option selected in the 'Actions' section, highlighted by a red box. The 'Follow Up' modal window is replaced by a 'File Upload' modal window. This window includes a 'File Name' input field, a 'Comment' text area, a 'follow this case' checkbox, and a 'Notifications' dropdown menu. An 'Upload' button is located at the bottom right of the modal. The sidebar and progress bar remain the same as in the previous screenshot.

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

Commission Inquiry Form, *continued*

39. 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.

The screenshot displays a web application interface for a 'Commission Inquiry-A-2601'. The top navigation bar shows a progress indicator with five steps: 1. New, 2. Assigned, 3. In-Progress, 4. Closed, and 5. Follow Up (which is highlighted). Below the navigation bar, there are sections for 'Votes' (0), 'Updated' (TEST AGENT, On 2017-11-18 08:37:16 PM, CST), 'Created' (TEST AGENT, On 2017-11-17 09:08:24 AM, CST), and 'Assigned To' (TestAnalyst1, Analyst). A 'Closure Comment' section is also present, with a 'Status' dropdown menu set to 'Follow Up'. A red box highlights the 'Follow Up' status. To the right, an 'Actions' section contains a message: 'Based on system permissions you are not allowed to execute any action at this time.' Below this, the 'AGENT INFORMATION' section includes fields for MA/GA #, Contact Person (TEST AGENT), Agent Name (TEST AGENT), NPN, Date Submitted (2017-11-17), Contact Email (123@gmail.com), and Agent ID # (12345). The 'SUBSCRIBER INFORMATION' section includes fields for Subscriber Name (Testing IBU Product), Last 4 of SSN, Date of Birth (YYYY-MM-DD), Legal Entity (BCBSM), Product (Unknown), Deld/ Contract Number (123456789), Policy Effective Date (YYYY-MM-DD), and Market Place (Y/N) (No). The 'PROBLEM IDENTIFICATION' section includes fields for Problem Code (Other) and Cash Post Date (2017-11-01). The 'PROBLEM RESOLUTION' section includes fields for Attach file, Additional Comments, Attachment, and Resolution (Commission amount will be paid and this case is now closed). Below these sections, there is a 'Related Cases' section with a message: 'Nothing found to display'. At the bottom, there is a 'Comments' section with a comment from KARL W ALBRECHT: 'I am following up regarding commission amount for June 2017' [2017-11-18 08:37:16 PM, CST, added comment].

40. 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**.



Commission Inquiry Form, *continued*

41. Analyst follow up comments can be found in “Comments” section.

The screenshot displays the 'Commission Inquiry-A-2601' form. The left sidebar shows the case status as 'Closed'. The main content area includes sections for 'AGENT INFORMATION', 'SUBSCRIBER INFORMATION', 'PROBLEM IDENTIFICATION', and 'PROBLEM RESOLUTION'. The 'Comments' section at the bottom is highlighted with a red box, showing two comments: one from 'TestAnalyst2' dated 2017-11-20 09:26:19 AM, CST, and another from 'TEST AGENT' dated 2017-11-20 09:24:08 AM, CST.

Sample Project A » Commission Inquiry-A-2601

Votes: 0

Updated: TestAnalyst2 On 2017-11-20 09:26:19 AM, CST

Created: TEST AGENT On 2017-11-20 09:18:50 AM, CST

Closing Date: 2017-11-20

Assigned To: TestAnalyst2 Analyst

Status: Closed

1 New 2 Assigned 3 In Progress 4 Closed 5 Follow Up

Actions: Attach File Follow Up Case Tools

Segment: Commercial Individual

AGENT INFORMATION

MA/GA # Date Submitted: 2017-11-20 (YYYY-MM-DD)

Contact Person: TEST AGENT Contact Email: 123@gmail.com

Agent Name: TEST AGENT Agent ID #: 12345

NPN

SUBSCRIBER INFORMATION

Subscriber Name: Testing IBU Product Deld/ Contract Number: 123456789

Last 4 of SSN Policy Effective Date (YYYY-MM-DD)

Date of Birth (YYYY-MM-DD) Market Place (Y/N): Yes

Legal Entity: BCBSM Product: Unknown

PROBLEM IDENTIFICATION

Problem Code: Other Cash Post Date: 2017-11-01 (YYYY-MM-DD)

Attach file

Additional Comments

PROBLEM RESOLUTION

Attachment

Resolution: This case is now closed

Related Cases: [Relate to Existing Cases] [Create Related Case]

Nothing found to display

Comments flat | Sort by date

TestAnalyst2
Commission amount for July 2017 approved.
[2017-11-20 09:26:19 AM, CST , added comment]

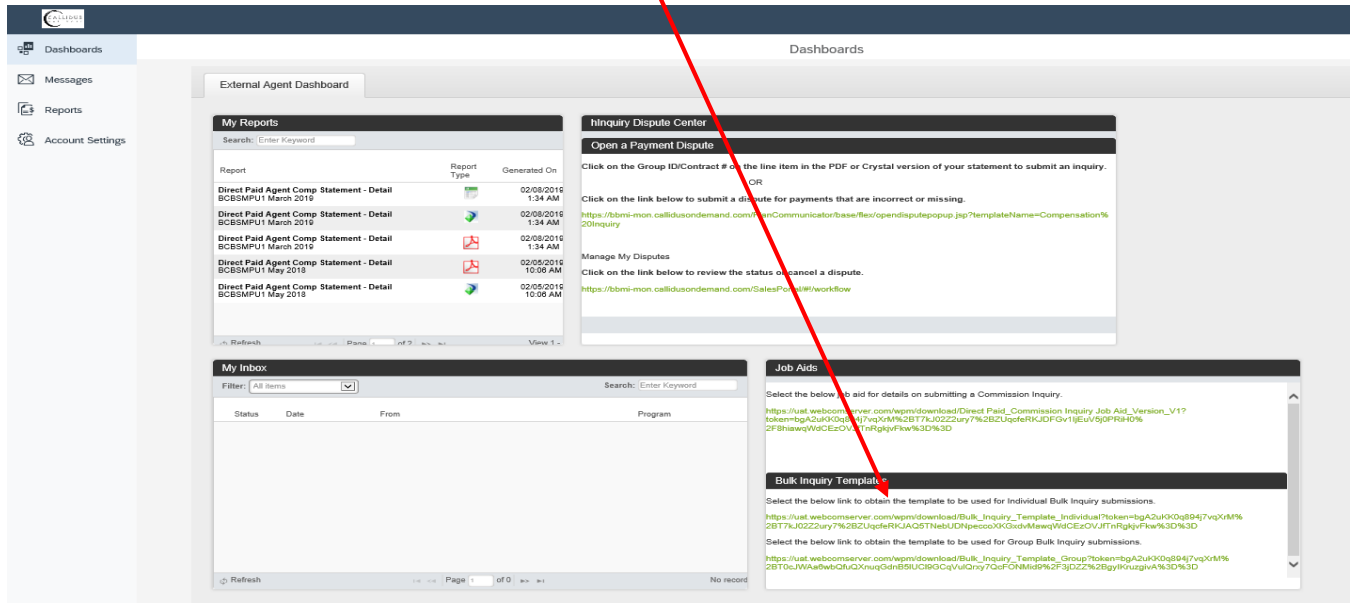
TEST AGENT
I am following up regarding commission payment for July 2017.
[2017-11-20 09:24:08 AM, CST , added comment]

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.

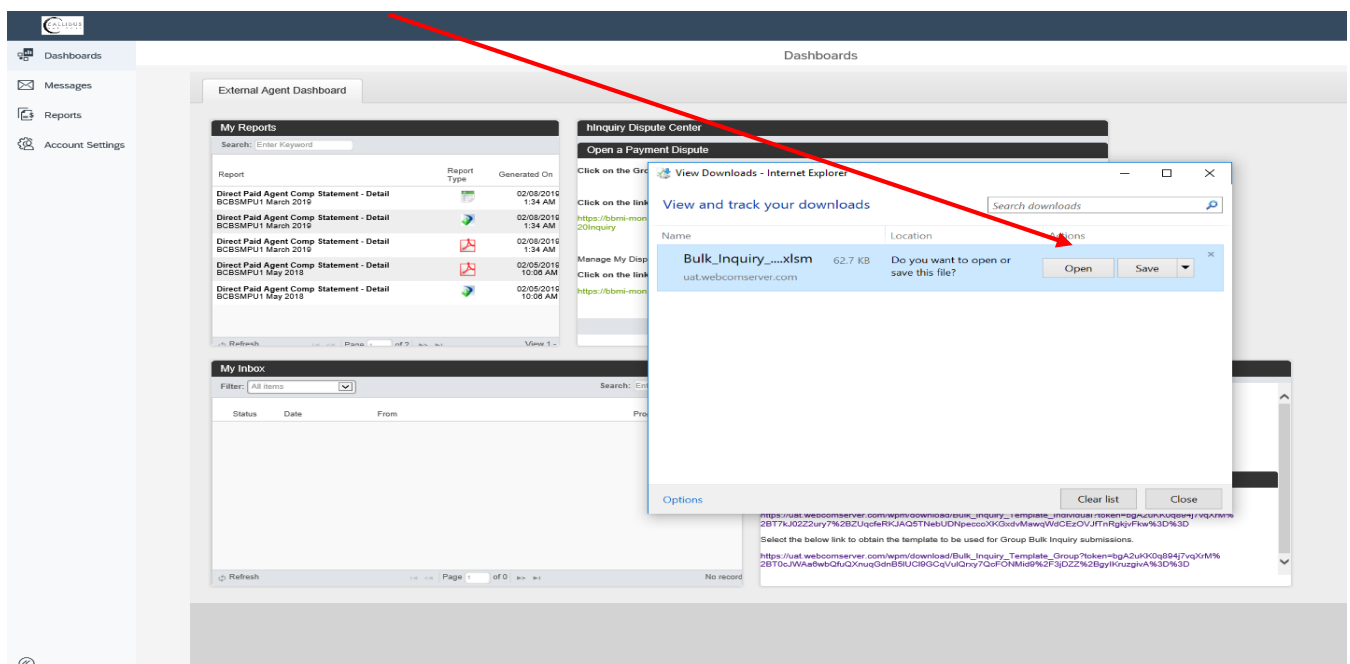
This screenshot is identical to the one above, showing the 'Commission Inquiry-A-2601' form with the 'Comments' section highlighted. It displays the same case details, including the status 'Closed' and the two comments from 'TestAnalyst2' and 'TEST AGENT'.

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.



BCBS Bulk Inquiry, *continued*

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.

[illegible]

The screenshot shows the Microsoft Excel interface with the following elements:

- File Name:** Bulk_Inquiry_Template_Individual.xlsm [Read-Only] - Excel
- Formulas Tab:** The ribbon is set to the Formulas tab, showing options like Find & Select, Calculation Groups, and the Formula Auditing group. The **Enable Content** button is highlighted with a red box and a red arrow.
- Security Warning:** A yellow banner at the bottom of the ribbon states "SECURITY WARNING: Macros have been disabled." with an "Enable Content" button.
- Worksheet:** The active worksheet is "Form". The grid shows columns A through L and rows 1 through 25. The header row (row 1) is labeled "Individual Business" and "Validation". The data area starts from row 3, column A, with headers for "Agent Information" and "SUBSCRIBER INFORMATION".

BCBS Bulk Inquiry, *continued*

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.

Bulk_Inquiry_Template_Individual.xlsx [Read-Only] - Excel

File Home Insert Draw Page Layout Formulas Data Review View TOPS Tell me what you want to do

Calibri 11 A A Font Font Alignment Alignment

General Number Conditional Formatting Table Styles

Normal Bad Good Neutral

A1 X ✓ ✗ A required fields as denoted by an * must be filled out for the respective business

1 All required fields as denoted by an * must be filled out for the respective business

2 Either 'Last 4 of SSN' OR DeID is required for Commercial Individual Segment.

3 Either 'Last 4 of HICN' OR DeID is required for Medicare Individual Segment.

4 User can submit bulk inquiry for Individual business only

5 For Individual business from Column A to Column V all required fields needs to be filled for the Inquiry to submit successfully

6 If the Problem Code is selected as 'Agent Incorrect' user must fill both 'Correct Agent #' and 'Correct Agent Name' fields.

7 If the Problem Code is selected as 'Commission Not Received' user must fill either field From 'Policy Effective Date' is required OR 'Range From' and 'To Date' both fields are required.

8 If the Problem Code is selected as 'Indicate Correct Rate' user must fill 'Incorrect Commission Applied' field.

9 Please do not copy and paste values in the template since we are having pre defined values for some fields

10 User can create bulk inquiry cases at a max of 500

11

12 The upload file must comply with the following constraints:

13

14 MA/GA/ ID	Must be 2 digit numeric	
15 Agent Name	Must be Alpha Numeric	
16 Agent ID	Must be 5 digit numeric	
17 Subscriber Name	Must be Alpha value	
18 DeID	Must be 9 digit number	
19 Last 4 of SSN	Must be 4 digit number	
20 HICN/ Member Id	Must be between 4 and 11 digits	
21 Marketplace	Select value from Drop down	
22 Segments	Select value from Drop down	
23 Legal Entity	Select value from Drop down	
24 Products	Select value from Drop down	
25 Problem Code	Select value from Drop down	
26		

27 If any of the required field is not filled and violating field constraint the system throws error. These errors will be visible in table with line number. User need to follow below steps to

28

29 Check whether all required fields are filled bases on segment

Form Field Validation Bulk Instructions

Ready

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

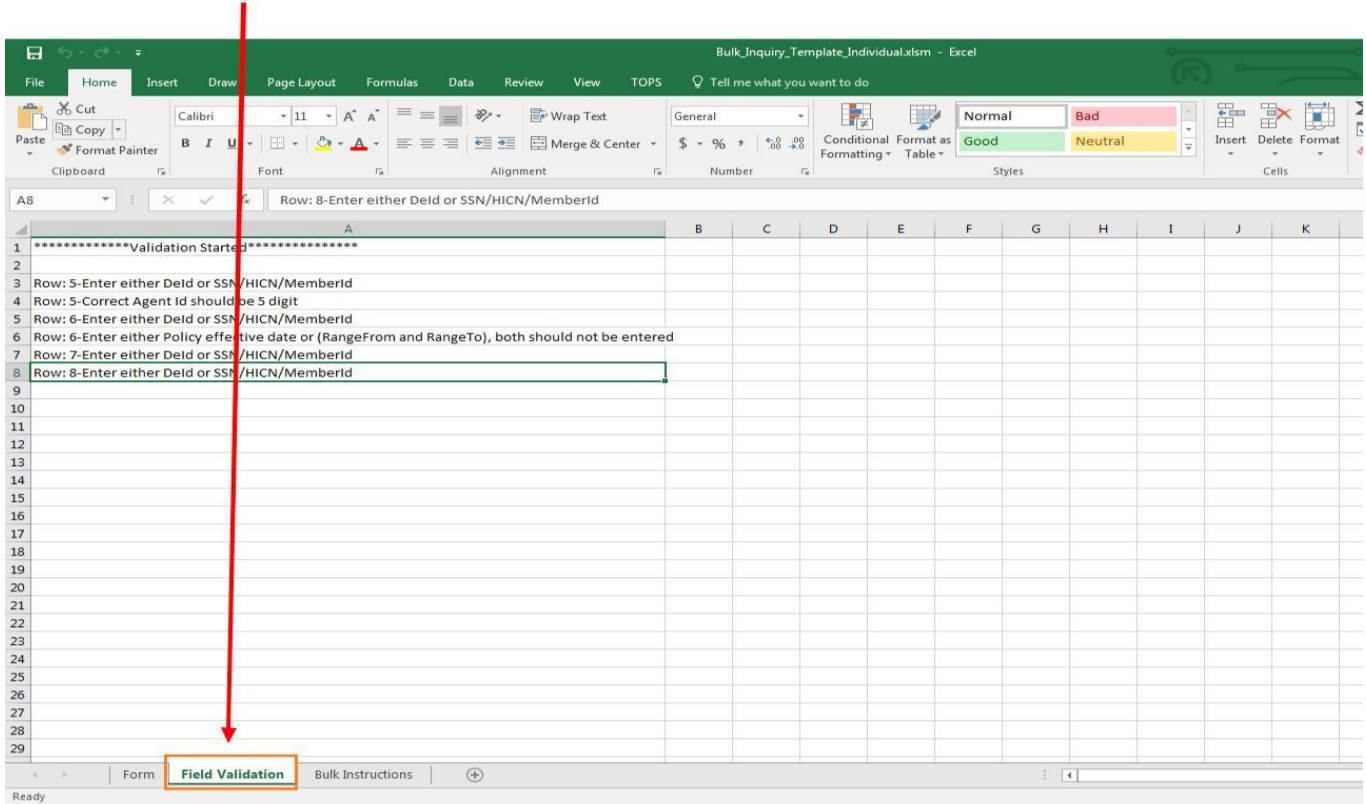
The screenshot shows an Excel spreadsheet with the following structure:

- Individual Business** (Row 1, Column A to M):
 - Validation** (Row 1, Column C to D)
- Agent Information** (Row 2, Column A to M):
 - Form** (Row 2, Column C to D)
- SUBSCRIBER INFORMATION** (Row 3, Column A to M):
 - Form** (Row 3, Column C to D)

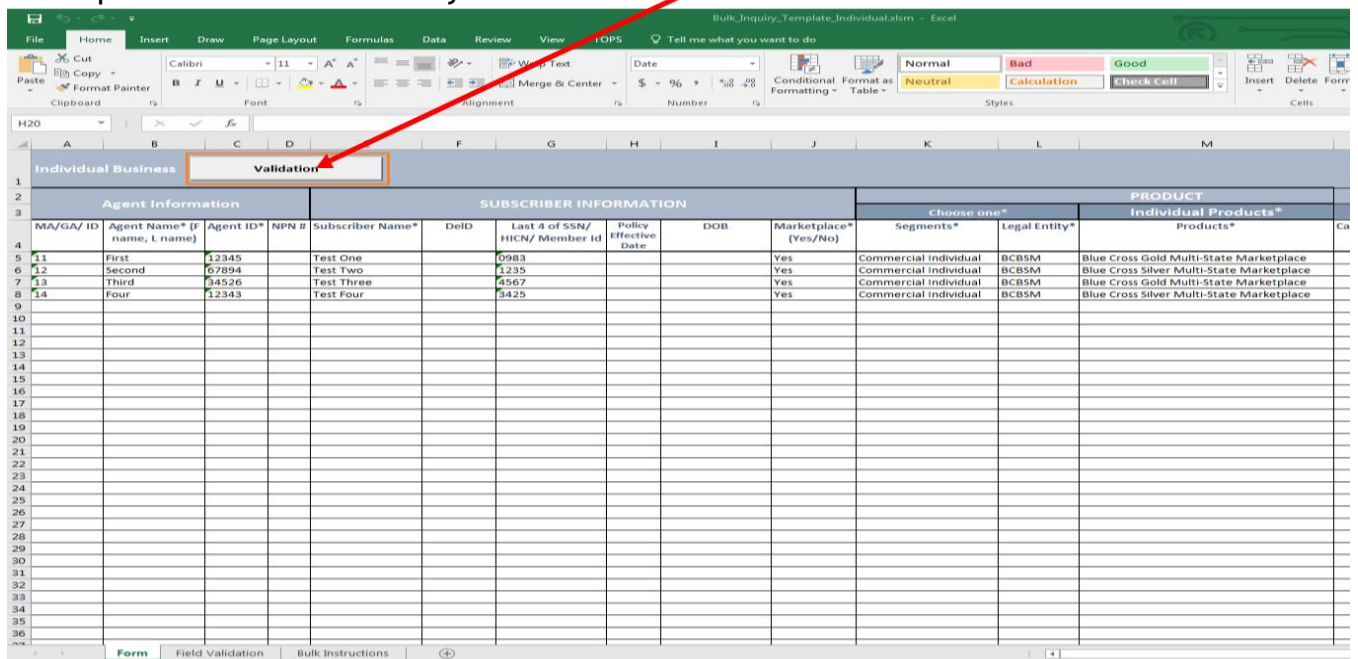
A red arrow points from the 'Form' tab in the 'SUBSCRIBER INFORMATION' section to the 'Form' tab in the 'Agent Information' section.

BCBS Bulk Inquiry, *continued*

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



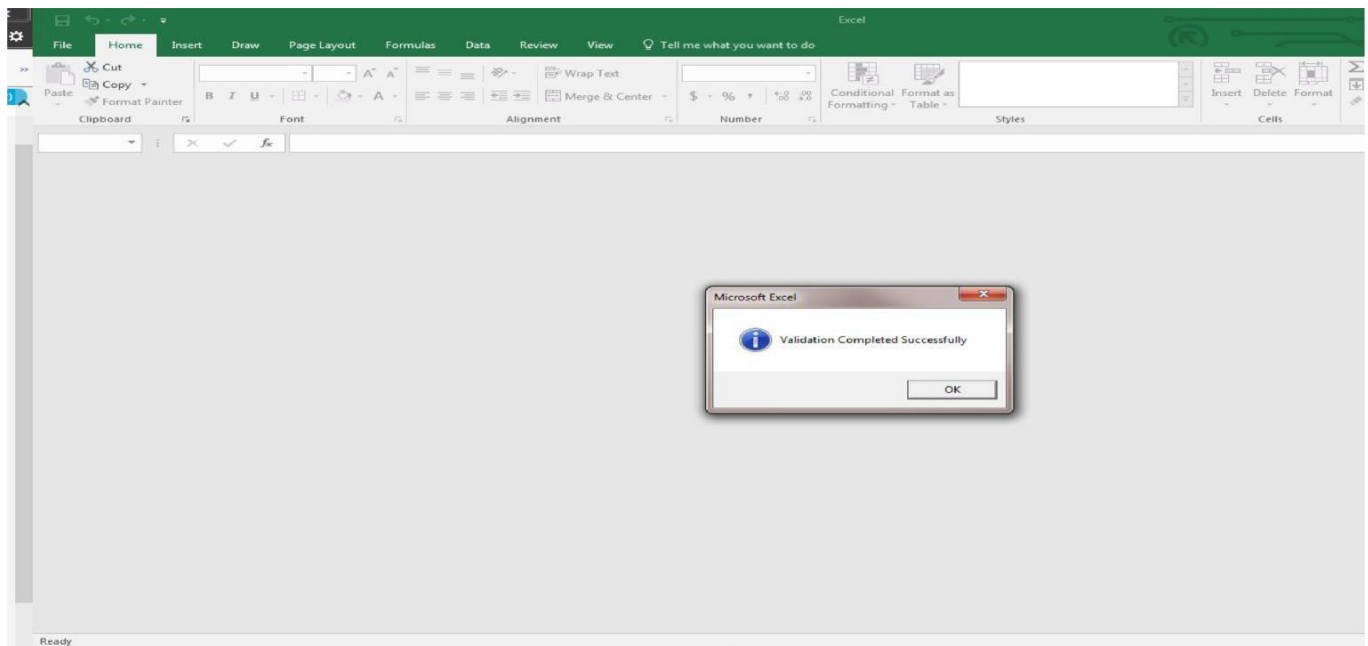
12. Fix the error(s) in the form sheet and click on 'Validation' button. Repeat steps 47 and 48 as necessary until validation is successful.



BCBS Bulk Inquiry, *continued*

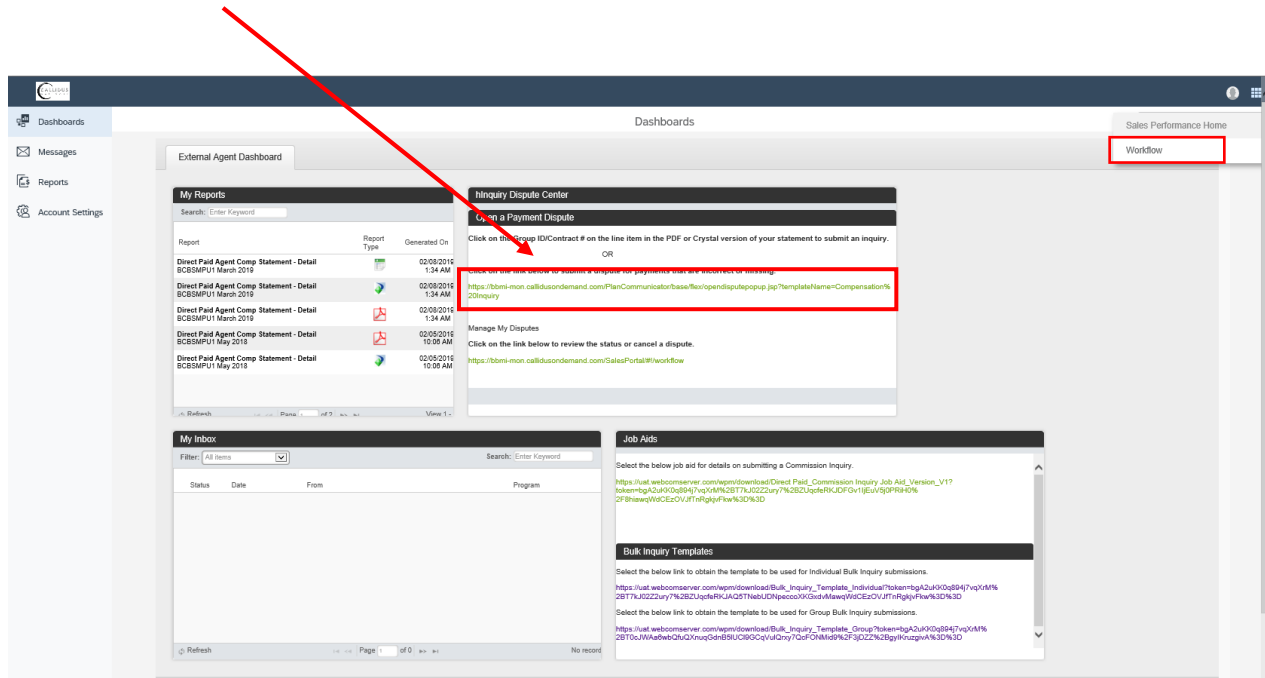
13. A pop up box will be displayed upon successful validation and the file will be automatically saved as an .xlsx format in the same location where the file was originally saved. This is the file required by the system to upload. Click OK in the pop up box.

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

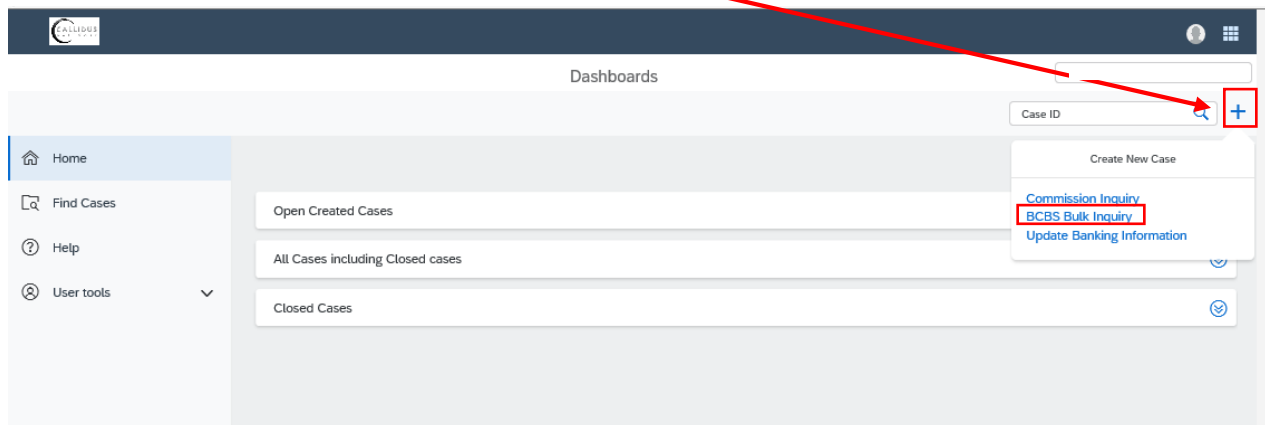
[illegible]

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.

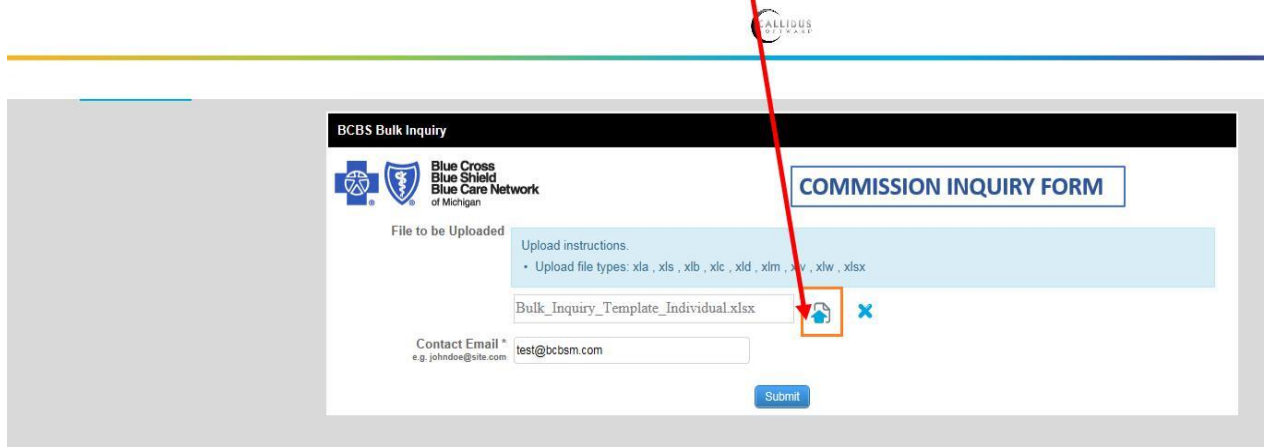


15. Once in workflow, click on '+' sign on the upper right-hand corner of the dashboard and select BCBS Bulk Inquiry from the drop-down list.



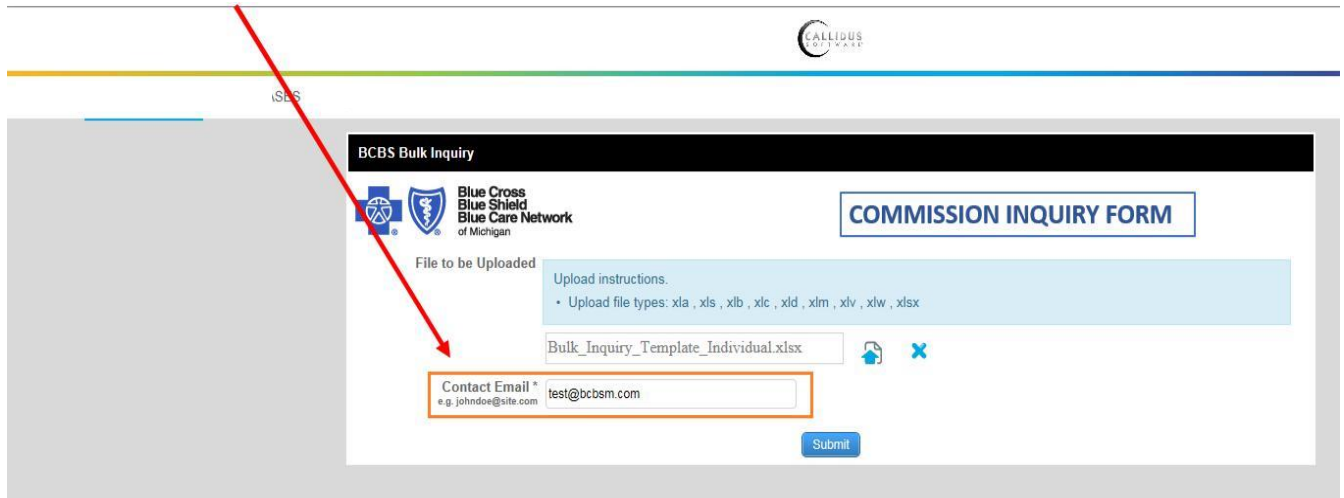
BCBS Bulk Inquiry, *continued*

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.



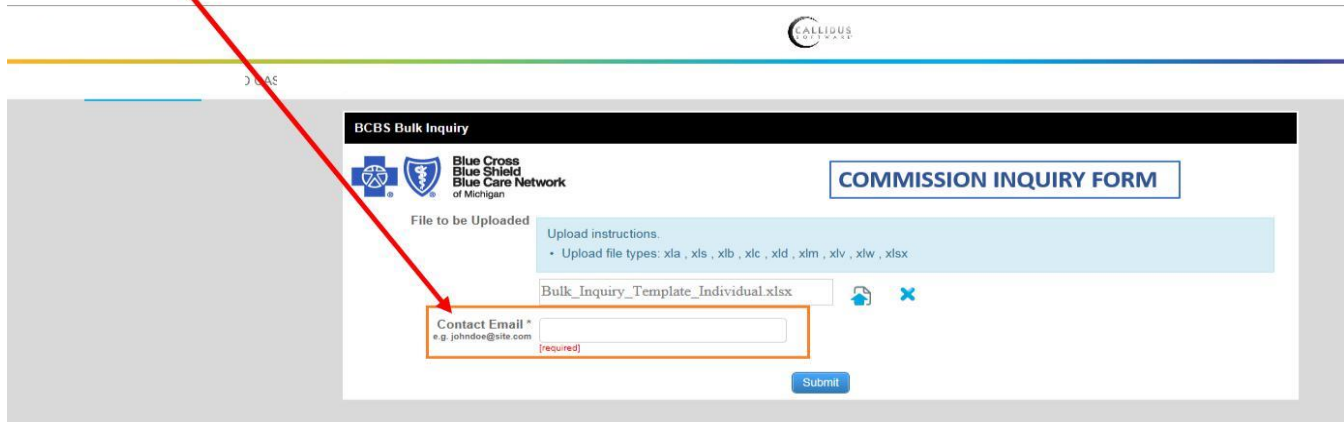
The screenshot shows the 'BCBS Bulk Inquiry' form. At the top right is a 'COMMISSION INQUIRY FORM' button. Below the header, there are logos for Blue Cross, Blue Shield, and Blue Care Network of Michigan. The 'File to be Uploaded' section includes 'Upload instructions' with a list of supported file types: xla, xls, xlb, xlc, xld, xlm, xlv, xlw, and xlsx. A text input field contains 'Bulk_Inquiry_Template_Individual.xlsx'. To the right of this field is an upload icon (a blue circle with a white document and a plus sign) and a close icon (a blue 'X'). A red arrow points from the instruction text to the upload icon. Below the file upload section is a 'Contact Email' field with a placeholder 'e.g. johndoe@site.com' and the value 'test@bcbsm.com'. A 'Submit' button is at the bottom right.

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



This screenshot is similar to the previous one, but the 'Contact Email' field is highlighted with an orange border. A red arrow points from the instruction text to this field. The field contains the value 'test@bcbsm.com'. The 'Submit' button is visible at the bottom right.

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



This screenshot shows the 'Contact Email' field highlighted with an orange border. A red arrow points from the instruction text to this field. The field is empty, and a red '[required]' label is visible at the bottom right of the input area. The 'Submit' button is at the bottom right.

BCBS Bulk Inquiry, *continued*

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.

BCBS Bulk Inquiry

Blue Cross Blue Shield of Michigan

COMMISSION INQUIRY FORM

File to be Uploaded

Upload instructions.

- Upload file types: xla , xls , xlb , xlc , xld , xlm , xlv , xlw , xlsx

Bulk_Inquiry_Template_Individual.xlsx

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

Submit

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 #.

Sample Project A - BCBS Bulk Inquiry-A-6121

Votes: 0

Updated: 1/24/2018 1:14:02 PM CST

Created: On 2018-01-24 01:14:02 PM CST

Assigned To:

Status: In-Progress

1 New 2 Error 3 Assigned 4 In-Progress 5 Parent Closed 6 Closed 7 Follow Up

Actions

Based on system permissions you are not allowed to execute any action at this time.

Related Cases

Case Key	Case Name	Assigned To	Updated	Status	
BCBS Bulk Inquiry-A-6122	BCBS Bulk Inquiry-A-6121-1	InqAnalystTL Analyst	2018-01-24 01:14:02 PM, CST	Assigned	wf_test_mi_bi
BCBS Bulk Inquiry-A-6125	BCBS Bulk Inquiry-A-6121-4	InqAnalystTL Analyst	2018-01-24 01:14:02 PM, CST	Assigned	wf_test_mi_bi
BCBS Bulk Inquiry-A-6124	BCBS Bulk Inquiry-A-6121-3	InqAnalystTL Analyst	2018-01-24 01:14:02 PM, CST	Assigned	wf_test_mi_bi
BCBS Bulk Inquiry-A-6123	BCBS Bulk Inquiry-A-6121-2	InqAnalystTL Analyst	2018-01-24 01:14:02 PM, CST	Assigned	wf_test_mi_bi

4 items found, displaying all items.

Attachments

File Name	Action	Uploaded By	Date Attached	Size
Bulk_Inquiry_Template_Individual.xlsx		BCBS Agent	2018-01-24 01:14:01 PM, CST	17.72 KB

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.

Sample Project A » BCBS Bulk Inquiry-A-6121

Votes: 0

Updated: VICTOR On 2018-01-24 01:14:03 PM, CST

Created: VICTOR On 2018-01-24 01:14:00 PM, CST

Assigned To: VICTOR

Status: In-Progress

1 New 2 Error 3 Assigned 4 In-Progress 5 Parent Closed 6 Closed 7 Follow Up

Actions: Based on system permissions you are not allowed to execute any action at this time.

Related Cases

Case Key	Case Name	Assigned To	Updated	Status
BCBS Bulk Inquiry-A-6121	BCBS Bulk Inquiry-A-6121-1	InqAnalystTL Analyst	2018-01-24 01:14:02 PM, CST	Assigned
BCBS Bulk Inquiry-A-6125	BCBS Bulk Inquiry-A-6121-4	InqAnalystTL Analyst	2018-01-24 01:14:02 PM, CST	Assigned
BCBS Bulk Inquiry-A-6124	BCBS Bulk Inquiry-A-6121-3	InqAnalystTL Analyst	2018-01-24 01:14:02 PM, CST	Assigned
BCBS Bulk Inquiry-A-6123	BCBS Bulk Inquiry-A-6121-2	InqAnalystTL Analyst	2018-01-24 01:14:02 PM, CST	Assigned

4 Items found, displaying all items.

Attachments

File Name	Action	Uploaded By	Date Attached	Size
Bulk_Inquiry_Template_Individual.xlsx		VICTOR M GETNER BCBS Agent	2018-01-24 01:14:01 PM, CST	17.72 KB

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.

Sample Project A » BCBS Bulk Inquiry-A-6121

Votes: 0

Updated: VICTORIA M GETNER On 2018-01-24 01:14:03 PM, CST

Created: VICTORIA M GETNER On 2018-01-24 01:14:00 PM, CST

Assigned To: VICTORIA M GETNER

Status: In-Progress

1 New 2 Error 3 Assigned 4 In-Progress 5 Parent Closed 6 Closed 7 Follow Up

Actions: Based on system permissions you are not allowed to execute any action at this time.

Related Cases

Case Key	Case Name	Assigned To	Updated	Status
BCBS Bulk Inquiry-A-6122	BCBS Bulk Inquiry-A-6121-1	InqAnalystTL Analyst	2018-01-24 01:14:02 PM, CST	Assigned
BCBS Bulk Inquiry-A-6125	BCBS Bulk Inquiry-A-6121-4	InqAnalystTL Analyst	2018-01-24 01:14:02 PM, CST	Assigned
BCBS Bulk Inquiry-A-6124	BCBS Bulk Inquiry-A-6121-3	InqAnalystTL Analyst	2018-01-24 01:14:02 PM, CST	Assigned
BCBS Bulk Inquiry-A-6123	BCBS Bulk Inquiry-A-6121-2	InqAnalystTL Analyst	2018-01-24 01:14:02 PM, CST	Assigned

4 Items found, displaying all items.

Attachments

File Name	Action	Uploaded By	Date Attached	Size
Bulk_Inquiry_Template_Individual.xlsx		VICTORIA M GETNER BCBS Agent	2018-01-24 01:14:01 PM, CST	17.72 KB

BCBS Bulk Inquiry, *continued*

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.

Sample Project A » BCBS Bulk Inquiry-A-6121

Votes: 0

Updated: VICTORIA M GETNER On 2018-01-24 01:14:00 PM, CST

Created: VICTORIA M GETNER On 2018-01-24 01:14:00 PM, CST

Assigned To: In-Progress

Status: In-Progress

1 New 2 Error 3 Assigned 4 In-Progress 5 Parent Closed 6 Closed 7 Follow Up

Actions: Based on system permissions you are not allowed to execute any action at this time.

Related Cases

Case Key	Case Name	Status	Updated	Assigned To
BCBS Bulk Inquiry-A-6122	BCBS Bulk Inquiry-A-6121-1	Assigned	2018-01-24 01:14:02 PM, CST	InqAnalystTL Analyst
BCBS Bulk Inquiry-A-6125	BCBS Bulk Inquiry-A-6121-4	Assigned	2018-01-24 01:14:02 PM, CST	InqAnalystTL Analyst
BCBS Bulk Inquiry-A-6124	BCBS Bulk Inquiry-A-6121-3	Assigned	2018-01-24 01:14:02 PM, CST	InqAnalystTL Analyst
BCBS Bulk Inquiry-A-6123	BCBS Bulk Inquiry-A-6121-2	Assigned	2018-01-24 01:14:02 PM, CST	InqAnalystTL Analyst

4 items found, displaying all items.

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.

Sample Project A » BCBS Bulk Inquiry-A-6121

Updated: InqAnalystTL On 2018-01-25 02:57:29 PM, CST

Created: VICTORIA M GETNER On 2018-01-24 01:14:00 PM, CST

Assigned To: Parent Closed

Status: Parent Closed

1 New 2 Error 3 Assigned 4 In-Progress 5 Parent Closed 6 Closed 7 Follow Up

Actions: Based on system permissions you are not allowed to execute any action at this time.

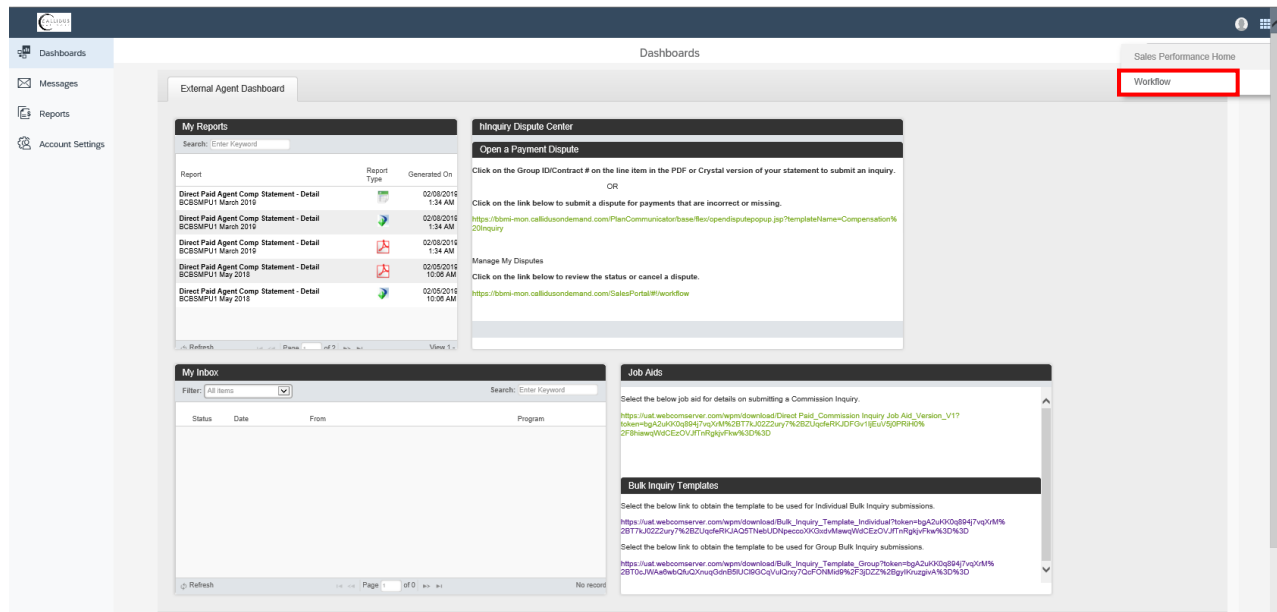
Related Cases

Case Key	Case Name	Status	Updated	Assigned To
BCBS Bulk Inquiry-A-6123	BCBS Bulk Inquiry-A-6121-2	Closed	2018-01-25 02:57:29 PM, CST	InqAnalystTL Analyst
BCBS Bulk Inquiry-A-6125	BCBS Bulk Inquiry-A-6121-4	Closed	2018-01-25 02:56:59 PM, CST	InqAnalystTL Analyst
BCBS Bulk Inquiry-A-6124	BCBS Bulk Inquiry-A-6121-3	Closed	2018-01-25 02:56:25 PM, CST	InqAnalystTL Analyst
BCBS Bulk Inquiry-A-6122	BCBS Bulk Inquiry-A-6121-1	Closed	2018-01-25 02:55:44 PM, CST	InqAnalystTL Analyst

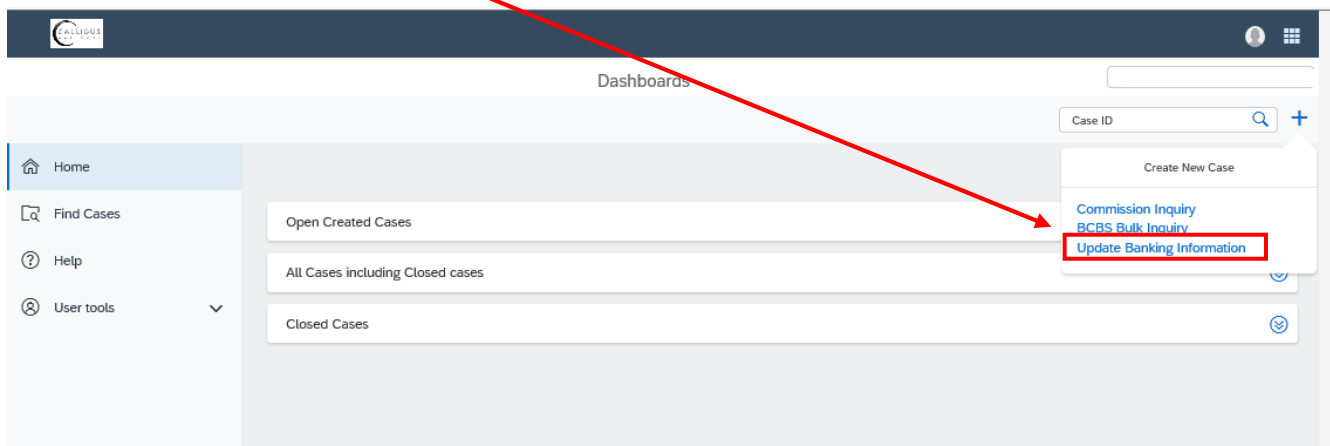
4 items found, displaying all items.

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.



Update Banking Information, *continued*

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

CALLIDUS SOFTWARE

Update Banking Information

Please select the type of form from the drop down for which the Banking Information needs to be updated.

Update Banking Information for *

--select--
W - 9 Form
ACH Form

Submit

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.

W-9 FORM



2023 • CHAPTER 1

W-9
Request for Taxpayer Identification Number and Certification

Use Part to be completed by the filer.

1 Name (as shown on income return). Please include what has been used for tax purposes.

2 Business name (if different from above).

3 Check appropriate box for federal tax classification of the person whose name is stated on line 1. (Check only one.)

4 Check appropriate box for federal tax classification of the person whose name is stated on line 1. (Check only one.)

5 Business name (if different from above).

6 Social Security number (SSN).

7 Taxpayer identification number (TIN).

8 State (and ZIP code).

9 Signature (print name and title).

10 Date.

ACH FORM



2023 • CHAPTER 1

ACH FORM
Request for Taxpayer Identification Number and Certification

Use Part to be completed by the filer.

1 Name (as shown on income return). Please include what has been used for tax purposes.

2 Business name (if different from above).

3 Check appropriate box for federal tax classification of the person whose name is stated on line 1. (Check only one.)

4 Check appropriate box for federal tax classification of the person whose name is stated on line 1. (Check only one.)

5 Business name (if different from above).

6 Social Security number (SSN).

7 Taxpayer identification number (TIN).

8 State (and ZIP code).

9 Signature (print name and title).

10 Date.

Update Banking Information, *continued*

OMB No. 1545-0047 Form 990-B (Rev. 11-18-2015) Page 2

Part III A. By signing this form, you certify that the TFR you are giving is correct or you are willing for a return to be issued.

B. Certify that you are not subject to backup withholding, or

C. Certify exemption from backup withholding if you are a U.S. exempt payee. If applicable, you are also certifying that as a U.S. payee, your allowable share of any partnership income from a U.S. trade or business is not subject to the withholding tax on foreign partner share of effectively connected income, and

D. Certify that FATCA is duly entered in this form if any individual that you are exempt from the FATCA reporting is correct. See what is FATCA reporting later for further information.

Note: If you are a U.S. person and a requester gave you a form that has been filed to request your TIN, you must enter the requester's name if it is substantially similar to the Form 990.

Definition of a U.S. person. For backup purposes, you are considered a U.S. person if you are:

- An individual who is a U.S. citizen or U.S. resident alien;
- A partnership, corporation, company, or association created or organized in the United States or under the laws of the United States;
- An estate other than a foreign estate; or
- A domestic trust as defined in Regulations section 301.7701-5.

Special rules for partnerships. Partnerships that conduct a trade or business in the United States are generally required to pay a withholding tax under section 1446 on any foreign partner's share of effectively connected taxable income from such business. Further, in certain cases where a Form 990 has not been received, the rules under section 1446 require a partnership to pay and that a partner is a foreign person, and pay the section 1446 withholding tax. Therefore, if you are a U.S. person that is a partner in a partnership conducting a trade or business in the United States, provide Form 990-B to the partnership to establish your U.S. status and avoid section 1446 withholding on your share of partnership income.

In the cases below, the following person must give Form 990-B to the partnership for purposes of establishing its U.S. status and avoiding withholding in its distributable share of net income from the partnership conducting a trade or business in the United States:

- In the case of a disregarded entity with a U.S. owner, the U.S. owner of the disregarded entity and not the entity;
- In the case of a partner that with a U.S. partner or other U.S. owner, generally, the U.S. partner or other U.S. owner of the partner trust and not the trust; and
- In the case of a U.S. partner that a partner trust, the U.S. trust other than a partner trust and not the beneficiaries of the trust.

Foreign person. If you are a foreign person or the U.S. branch of a foreign person that not elected to be treated as a U.S. person, do not use Form 990-B. Instead, use the appropriate Form 990-B or Form 990-BE (see Pub. 575, Withholding of Tax on Nonresident Aliens and Foreign Entities).

Nonresident alien who becomes a resident alien. Generally, only a nonresident alien individual may use the form or be able to receive or otherwise U.S. tax on certain types of income. However, under the treaty, certain provisions known as a "saving clause." Exceptions specified in the saving clause may permit an exemption from tax to continue for certain types of income even after the person has otherwise become a U.S. resident alien for the purposes.

If you are a U.S. resident alien who is exempt from the withholding tax on the basis of a treaty, you must attach an affidavit to Form 990-B that specifies the following for the form:

1. The treaty country. (Generally, this must be the same treaty under which you claimed exemption from tax as a nonresident alien.)
2. The treaty article addressing the income.
3. The article number or portion of the law that contains the treaty claim and its exceptions.
4. The type and amount of income that qualifies for the exemption from tax.
5. Sufficient facts to justify the exemption from tax under the terms of the treaty article.

OMB No. 1545-0047 Form 990-B (Rev. 11-18-2015) Page 2

General penalty for falsifying information. Willfully falsifying information or a statement may subject you to criminal penalties including fines and/or imprisonment.

Measure of TFR. If the requester discloses or uses this information of backup tax, the requester may be subject to civil and criminal penalties.

Specific Instructions

Line 1

You must enter one of the following on this line. Do not leave this line blank. The name entered matches the name on your tax return.

If this Form 990-B is for a joint account holder for an account maintained by a foreign financial institution (FFI), see Part III, and then check the name of the person or entity whose name you entered on Part I of Form 990-B. If you are providing Form 990-B to a partner of a joint account, each holder of the account that is a U.S. person must provide a Form 990-B.

a. Individual. Generally, enter the name shown on your tax return. If you have changed your last name without changing the Social Security Administration (SSA) of the name change, enter your first name. The last name as shown on your social security card and your new last name.

Note (TIN required). Enter your individual name as it was entered on your Form 990-B (applicant, line 1). This should also be the name on the name as entered on the Form 1041/1041-SS/1041-SSR you filed with your application.

b. Sole proprietor or single-member LLC. Enter your individual name as shown on your 1041/1041-SS/1041-SSR and on Form 990-B. You may enter your business name, or "doing business as" (DBA) name on line 2.

c. Partnership, LLC that is not a single-member LLC, C corporation, or S corporation. Enter the entity's name as shown on the entity's tax return on line 1 and any business, trade, or DBA name on line 2.

d. Other entities. Enter your name as shown on required U.S. federal tax documents on line 1. This name should match the name shown on the creditor or other right document creating the debt. The name of the business, trade, or DBA name on line 2.

e. Disregarded entity. For U.S. federal tax purposes, an entity that is disregarded as an entity separate from its owner is treated as a "disregarded entity." See Regulations section 301.7701-2(c)(2)(ii). Enter the owner's name on line 1. The name of the entity entered on line 1 should never be a disregarded entity. The name on line 1 should be the name shown on the income tax return on which the income should be reported. For example, a foreign LLC that is treated as a disregarded entity for U.S. federal tax purposes has a single owner that is a U.S. person. If the owner's name is to be provided on line 1, if the direct owner of the entity is also a disregarded entity, enter the first owner that is not disregarded for federal tax purposes. Enter the disregarded entity's name on line 2. If the owner is a foreign person, the owner must complete an appropriate Form 990-B (instead of Form 990-B). This is the case even if the foreign person has a U.S. TIN.

Line 2

If you have a business name, trade name, DBA name, or disregarded entity name, please enter it on line 2.

Line 3

Check the appropriate box on line 3 for the U.S. federal tax classification of the person whose name is entered on line 1. Check only one box on line 3.

Box 1: If the entity is a U.S. person, check the appropriate box on line 3 for the U.S. federal tax classification of the person whose name is entered on line 1. Check only one box on line 3.

Box 2: If the entity is a foreign person, check the appropriate box on line 3 for the U.S. federal tax classification of the person whose name is entered on line 1. Check only one box on line 3.

Box 3: If the entity is a foreign person, check the appropriate box on line 3 for the U.S. federal tax classification of the person whose name is entered on line 1. Check only one box on line 3.

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Update Banking Information, *continued*

Form 990 (Rev. 11-2015) Page **4**

The following chart shows types of payments that may be exempt from backup withholding. The chart applies to the exempt payee listed above. 1 through 13.

If the payment is for...	TIN/IN the payment is exempt for...
Interest and dividend payments	All exempt payees except for 7
Broker transactions	Exempt payees 1 through 4 and 6 through 13 and all C corporations. C corporations must not enter an exempt payee code because they are exempt only for sales of noncovered securities acquired prior to 2013.
Barter exchange transactions and patronage dividends	Exempt payees 1 through 6
Payments over \$100 required to be reported and direct sales over \$1,000 ²	Generally, exempt payees 1 through 5 ³
Payments made in settlement of account and all third-party network transactions	Exempt payees 1 through 6

¹ Sole Form 1099-MISC, Miscellaneous Income, and its instructions.

² However, the following payments made to a corporation and reportable on Form 1099-MISC are not exempt from backup withholding: medical and health care payments, attorney fees, gross proceeds paid to an attorney representative under section 6345(c), and payments for services paid by a health insurance agency.

Exemption from FATCA reporting code. The following codes identify payees that are exempt from reporting under FATCA. These codes apply to persons submitting this form for accounts maintained outside of the United States by certain foreign financial institutions. Therefore, if you are only submitting this form for an account you have in the United States, you may leave this field blank. Consult with the person requesting this form if you are unsure if your institution is subject to these requirements. A requester may indicate that a code is not required by providing you with a Form W-9 with "Not Applicable" or any similar indication either on printed or the line for a FATCA exemption code.

³ An organization exempt from tax under section 501(c) or any individual retirement plan as defined in section 721(a)(3).

B—The United States or any of its agencies or instrumentalities.

C—A state, the District of Columbia, a U.S. commonwealth or possession, or any of their political subdivisions or instrumentalities.

D—A corporation the stock of which is regularly traded on one or more national securities markets, as described in Regulation section 1.1472-1(c)(3)(i).

E—A corporation that is a member of the same expanded affiliated group as a corporation described in Regulation section 1.1472-1(c)(3)(ii).

F—A dealer in securities, commodities, or derivative financial instruments (including national principal contracts, futures, forwards, and options) that is registered as such under the laws of the United States or any state.

G—A real estate investment trust.

H—A regulated investment company as defined in section 851 or an entity registered at all times during the tax year under the Investment Company Act of 1940.

I—A common trust fund as defined in section 584(b).

J—A bank as defined in section 561.

K—A broker.

L—A trust exempt from tax under section 664 or described in section 664(c)(2).

M—A tax-exempt trust under a section 402(a) plan or section 407(a) plan.

Note: You may wish to consult with the financial institution requesting this form to determine whether the FATCA code and/or exempt payee code should be completed.

Line 5

Enter your address number, street, and apartment or suite number. This is where the requester of this form (if not mail your information returns, if this address differs from the one the requester already has on file, write HIREY at the top. If a new address is provided, there is still a chance the old address will be used until the payer changes your address in their records.

Line 6

Enter your city, state, and ZIP code.

Part I. Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. If you are a resident alien and you do not have and are not eligible to get an SSN, enter "99-99-9999" individual taxpayer identification number (ITIN). Enter it in the second security number box. If you do not have an ITIN, see how to get a TIN below.

If you are a sole proprietor and you have an EIN, you may enter either your SSN or EIN.

If you are a single-member LLC that is disregarded as an entity separate from its owner, enter the owner's SSN or EIN. If the owner has one, do not enter the disregarded entity's EIN. If the LLC is classified as a corporation or partnership, enter the entity's EIN.

Note: See What Name and Number To Give the Requester, later, for further instructions on name and TIN considerations.

How to get a TIN. If you do not have a TIN, apply for one immediately to apply for an SSN. Get Form SS-4, Application for a Social Security Card, from your local SSA office or get the form online at www.irs.gov/ssa. You may also get the form by calling 1-800-722-1213. Use Form SS-4. Application for IRS Individual Taxpayer Identification Number, to apply for an ITIN or Form SS-4, Application for Employer Identification Number, to apply for an EIN. You can apply for an EIN online by accessing the IRS website at www.irs.gov/businesses and clicking on Employer Identification Number (EIN) under Starting a Business. Go to www.irs.gov/ssa to learn, download, or get Form SS-4 and Form SS-4-CP. You can go to www.irs.gov/ssa to learn how to get an EIN and how Form SS-4 and Form SS-4-CP relate to you when 90 business days.

If you are asked to complete Form SS-4 but do not have a TIN, apply for a TIN and enter "Applied For" in the space for the TIN, sign, and date the form, and give it to the requester. For interest and dividend payments, and certain payments made with respect to readily tradable instruments, generally you will have 60 days to get a TIN and give it to the requester before you are subject to backup withholding on payments. The 60-day rule does not apply to other types of payments. You will be subject to backup withholding on all such payments until you provide your TIN to the requester.

Note: Entering "Applied For" means that you have already applied for a TIN or that you intend to apply for one soon.

Caution: A disregarded U.S. entity that has a foreign owner must use the appropriate Form W-9.

Part II. Certification

To establish to the withholding agent that you are a U.S. person, or resident alien, sign Form SS-4. You are not required to sign to the withholding agent over Form 1, 4, or 5 below indicates otherwise.

For a joint account, only the person whose TIN is shown in Part I should sign before required. In the case of a disregarded entity, the person identified on line 1 must sign. Exempt payees, see Exempt payee code, earlier.

Signature requirements. Complete the certification as indicated in items 1 through 5 below.

Form 990 (Rev. 11-2015) Page **5**

1. Interest, dividend, and barter exchange accounts opened before 1984 and broker accounts considered active during 1983. You must give your correct TIN, but you do not have to sign the certification.

2. Interest, dividend, broker, and barter exchange accounts opened after 1983 and broker accounts considered inactive during 1983. You must sign the certification or backup withholding will apply. If you are subject to backup withholding and you are merely providing your correct TIN to the requester, you must enter on line 2 a 0 (zero) certification before signing the form.

3. Real estate transactions. You must sign the certification. You may print out item 3 of the certification.

4. Other payments. You must give your correct TIN, but you do not have to sign the certification unless you have been notified that you have already given an incorrect TIN. "Other payments" include payments made in the course of the requester's trade or business for rent, royalties, goods (other than sales for merchandise, medical and health care services (including payments to corporations), payments to a nonexempt for services, payments made in settlement of payment card and third-party network transactions, payments to certain selling third-party members and franchisees, and gross proceeds paid to attorneys (including payments to corporations).

5. Mortgage interest paid by you, acquisition or abandonment of secured property, cancellation of debt, qualified tuition program payments (under section 529), ABLE accounts (under section 529A), IRA, Coverdell ESA, Archer MSA or HSA contributions or distributions, and pension distributions. You must give your correct TIN, but you do not have to sign the certification.

What Name and Number To Give the Requester

For this type of account:	Give name and SSN or:
1. Individual	The individual.
2. Two or more individuals (joint accounts, joint or joint tenancy, community property, or joint tenancy in common)	The actual owner of the account or, if co-owners, the first individual on the account.
3. Two or more U.S. persons (joint account maintained by an IR)	Each holder of the account.
4. Custody account of a minor (custody of a minor, joint, or joint tenancy)	The minor. ¹
5. A trust (revocable or irrevocable, grantor trust, or trust for a minor or adult)	The grantor/minor. ²
6. A sole proprietorship or individual entity owned by an individual	The sole owner. ³
7. A partnership or other entity (other than a trust or partnership) owned by two or more U.S. persons	The partner. ⁴

For this type of account:

Give name and EIN or:	
8. Disregarded entity or owned by an individual	The owner.
9. A sole proprietorship, partnership, or other entity	The owner. ⁵
10. Corporation or LLC electing corporate status on Form 9608 or Form 9609	The corporation.
11. Association, club, religious, charitable, educational, or other tax-exempt organization	The organization.
12. Partnership or multi-member LLC	The partner.
13. A trust or registered common	The trustee or trustee.

¹ List first and circle the name of the person whose number you furnish. If only one person on a joint account has an SSN, that person's number must be furnished.

² Circle the minor's name and furnish the minor's SSN.

³ You must show your individual name and you may also enter your business or CPA name on the "Business name (disregarded entity)" name line. You may use your SSN or EIN if you have one, but the IRS encourages you to use your SSN.

⁴ List first and circle the name of the trust, estate, or partnership. Do not furnish the TIN of the personal representative or trustee unless the legal entity itself is not disregarded in the account title. Also see Special rules for partnerships, earlier.

⁵ Note: The grantor also must provide a Form 48-B to trustee of trust. Note: If no name is listed when more than one name is listed, the number will be considered to be that of the first name listed.

Secure Your Tax Records From Identity Theft

Identity theft occurs when someone uses your personal information such as your name, SSN, or other identifying information, without your permission, to commit fraud or other crimes. As identity theft rises, so does your risk to get a job or may be a tax return using your SSN to receive a refund.

To reduce your risk:

- Protect your SSN.
- Ensure your employer is protecting your SSN, and
- Be careful when choosing a tax preparer.

If your tax records are affected by identity theft and you receive a notice from the IRS, respond right away to the name and phone number printed on the IRS notice or letter.

If your tax records are not currently affected by identity theft but you think you are at risk due to a lost or stolen purse or wallet, questionable credit card activity or credit report, contact the IRS Identity Theft Hotline at 1-800-908-4490 or submit Form 14033.

For more information, see Pub. 5923, Identity Theft Information for Taxpayers.

Victims of identity theft who are experiencing economic harm or a systemic problem, or are seeking help in resolving tax problems that have not been resolved through normal channels, may be eligible for Taxpayer Advocate Service (TAS) assistance. You can reach TAS by contacting TAS, but first call either one at 1-877-777-4778 or TTY-TDD 1-800-829-4835.

Protect yourself from suspicious emails or phishing schemes. Phishing is the creation and use of email and websites designed to mimic legitimate bank websites and websites. The most common sign is sending an email to a user falsely claiming to be an established legitimate enterprise or an attempt to learn the user who submitting private information that will be used for identity theft.

Update Banking Information, *continued*

Form W-9 (Rev. 11-2013) Page 6

The IRS does not release contact information with taxpayers via email. Also, the IRS does not request personal information through email or ask taxpayers for the PIN number, passwords, or similar secret access information for their credit card, bank, or other financial accounts.

If you receive an unsolicited email claiming to be from the IRS, forward this message to phishing@irs.gov. You may also report misuse of the IRS name, logo, or other IRS property to the Treasury Inspector General for Tax Administration (TIGTA) at 1-800-368-1081. You can forward suspicious emails to the Federal Trade Commission at spam@ftc.gov or report them at www.ftc.gov/complaint. You can contact the IRS at www.irs.gov/whistleblower, 1-877-438-3237, or if you have been the victim of identity theft, see www.identitytheft.gov and Pub. 5027.

Visit www.irs.gov/identitytheft to learn more about identity theft and how to reduce your risk.

Privacy Act Notice

Section 6109 of the Internal Revenue Code requires you to provide your correct TIN to persons (including federal agencies) who are required to file information returns with the IRS to report interest, dividends, or certain other income paid to you, mortgage interest you paid, the acquisition or abandonment of secured property, the cancellation of debt, or contributions you made to an IRA, Archer MSA, or HSA. The person collecting this form uses the information on the form to file information returns with the IRS, reporting the above information. Routine uses of this information include giving it to the Department of Justice for civil and criminal litigation and to cities, states, the District of Columbia, and U.S. courts, executive and prosecutive for use in administering their laws. The information also may be disclosed to other countries under a treaty, to federal and state agencies to enforce civil and criminal laws, or to federal law enforcement and intelligence agencies to combat terrorism. You must provide your TIN whether or not you are required to file a tax return. Under section 3406, payers must generally withhold a percentage of taxable interest, dividend, and certain other payments to a payee who does not give a TIN to the payer. Certain penalties may also apply for providing false or fraudulent information.

Cancel Save Preview **Submit**

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.

CALLIDUS SOFTWARE

Update Banking Information

Form **W-9**
(Rev. November 2017)
Department of the Treasury
Internal Revenue Service

Request for Taxpayer Identification Number and Certification

► Go to www.irs.gov/FormW9 for instructions and the latest information.

Give Form requester. send to the

1 Name (as shown on your income tax return) This line blank. *

2 Business name/disregarded entity name,

3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only one of the following seven boxes.

☒ Individual/sole proprietor or single-member LLC ☐ C Corporation ☐ S Corporation ☐ Partnership

☐ Trust/estate

☐ Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership)

Note: Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a partnership.

4 Exemptions (codes for individuals; see instructions)

Exempt payee code (if any)

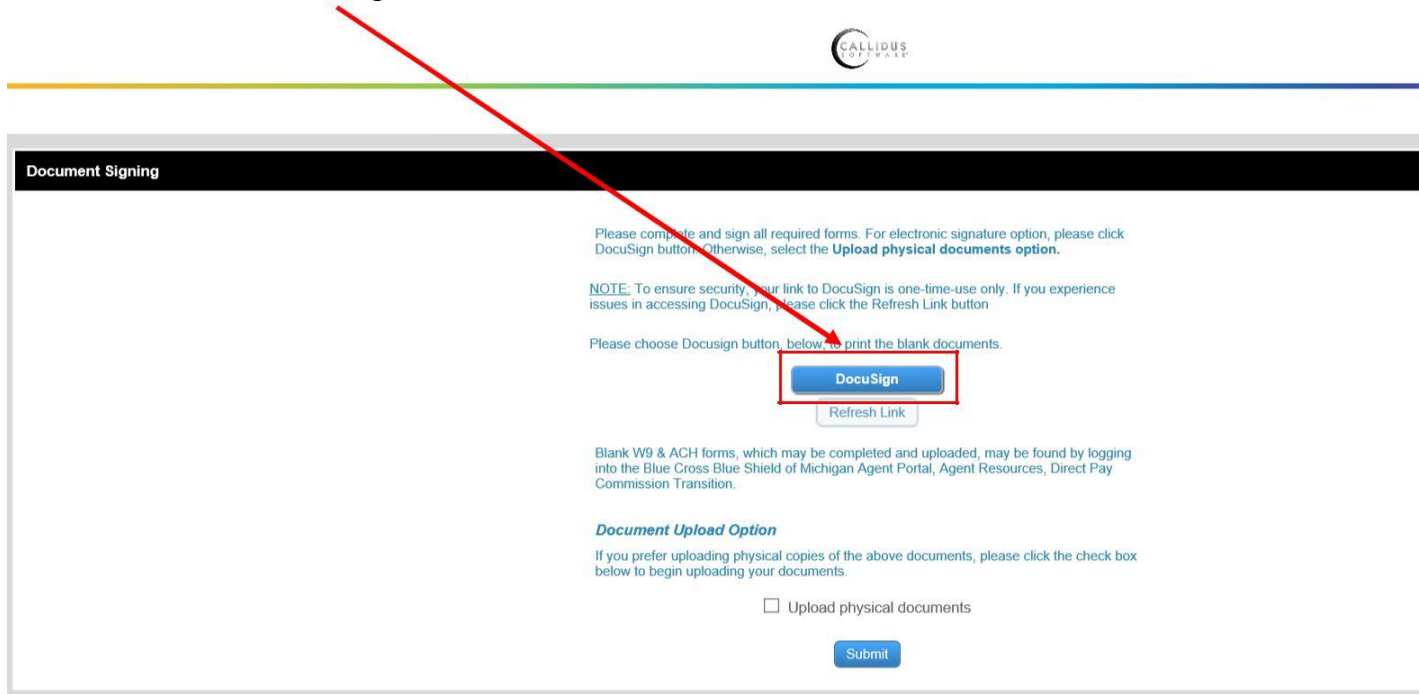
Exemption from FATCA reporting code (if any)

Do you want to Submit the form without Preview? (Form Cannot be edited on Submit)

Yes **No**

Update Banking Information, *continued*

9. Click on the DocuSign button.



The screenshot shows a web page titled "Document Signing" with a "CALLIDUS" logo in the top right. The page contains instructions for signing documents. A red arrow points from the instruction "Click on the DocuSign button." to a blue button labeled "DocuSign". Below this button is a "Refresh Link" button. The page also includes a "Document Upload Option" section with a checkbox for "Upload physical documents" and a "Submit" button.

Please complete and sign all required forms. For electronic signature option, please click DocuSign button. Otherwise, select the **Upload physical documents option**.

NOTE: To ensure security, your link to DocuSign is one-time-use only. If you experience issues in accessing DocuSign, please click the Refresh Link button

Please choose DocuSign button, below, to print the blank documents.

DocuSign

Refresh Link

Blank W9 & ACH forms, which may be completed and uploaded, may be found by logging into the Blue Cross Blue Shield of Michigan Agent Portal, Agent Resources, Direct Pay Commission Transition.

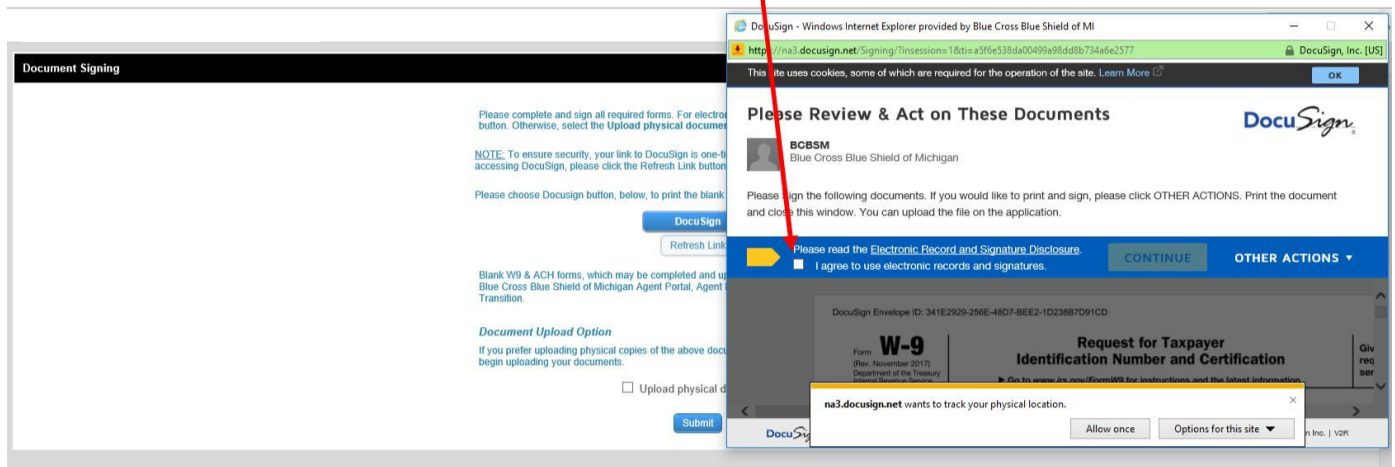
Document Upload Option

If you prefer uploading physical copies of the above documents, please click the check box below to begin uploading your documents.

☐ Upload physical documents

Submit

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.



The screenshot shows a web browser window displaying the DocuSign "Please Review & Act on These Documents" page. A red arrow points from the instruction "select the check box that says, 'I agree to use electronic records and signature'" to a checkbox labeled "I agree to use electronic records and signatures." The page also shows a "CONTINUE" button and an "OTHER ACTIONS" dropdown menu. Below the checkbox, there is a "W-9" form and a "Request for Taxpayer Identification Number and Certification" form. A small notification at the bottom states "na3.docusign.net wants to track your physical location." with "Allow once" and "Options for this site" buttons.

DocuSign - Windows Internet Explorer provided by Blue Cross Blue Shield of MI

http://na3.docusign.net/Signing/Tmsessions/16f6a5f5e338da00499e98dd86734a5e2577 DocuSign, Inc. [US]

This site uses cookies, some of which are required for the operation of the site. [Learn More](#) **OK**

Please Review & Act on These Documents

BCBSM
Blue Cross Blue Shield of Michigan

Please sign the following documents. If you would like to print and sign, please click **OTHER ACTIONS**. Print the document and close this window. You can upload the file on the application.

Please read the **Electronic Record and Signature Disclosure**

☒ I agree to use electronic records and signatures. **CONTINUE** **OTHER ACTIONS** ▼

DocuSign Envelope ID: 341E2929-256E-48D7-BEE2-1D238B7D91CD

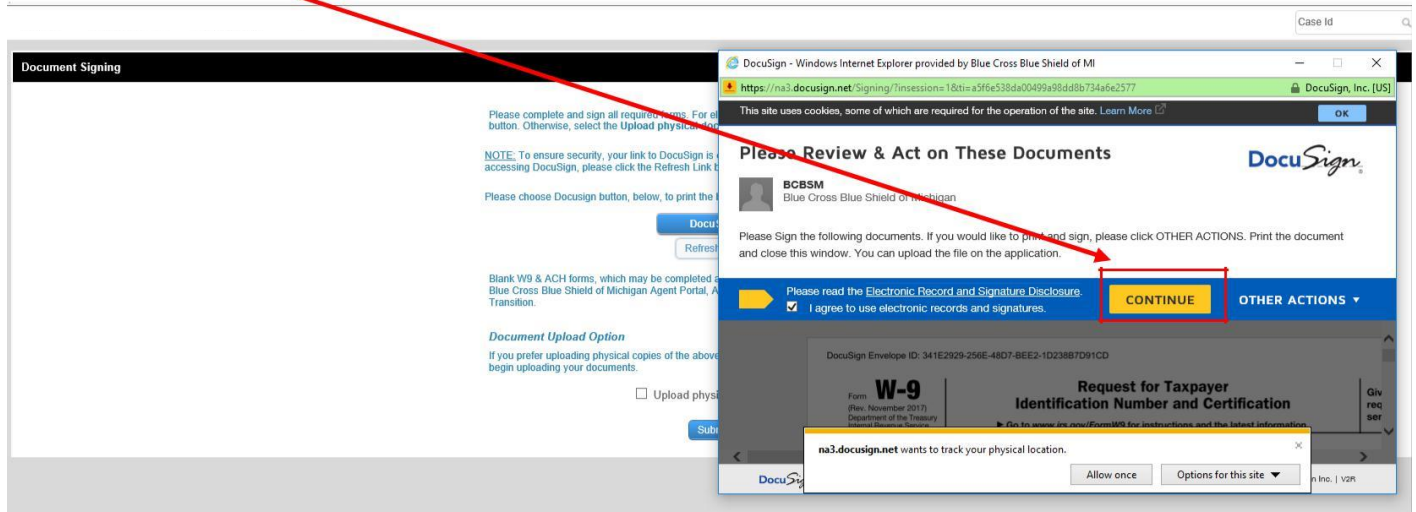
W-9
Form (Rev. November 2017)
Department of the Treasury
Internal Revenue Service

Request for Taxpayer Identification Number and Certification

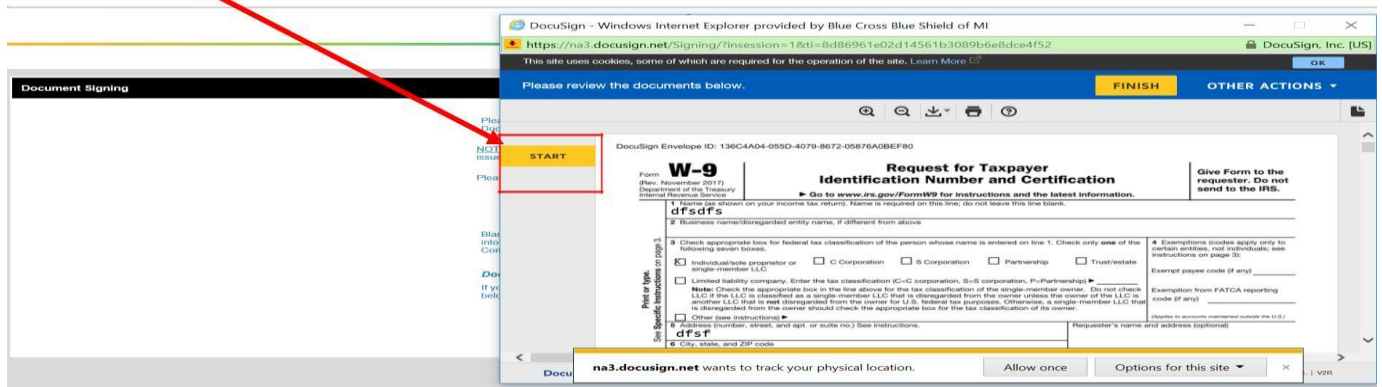
na3.docusign.net wants to track your physical location. **Allow once** **Options for this site** ▼

Update Banking Information, *continued*

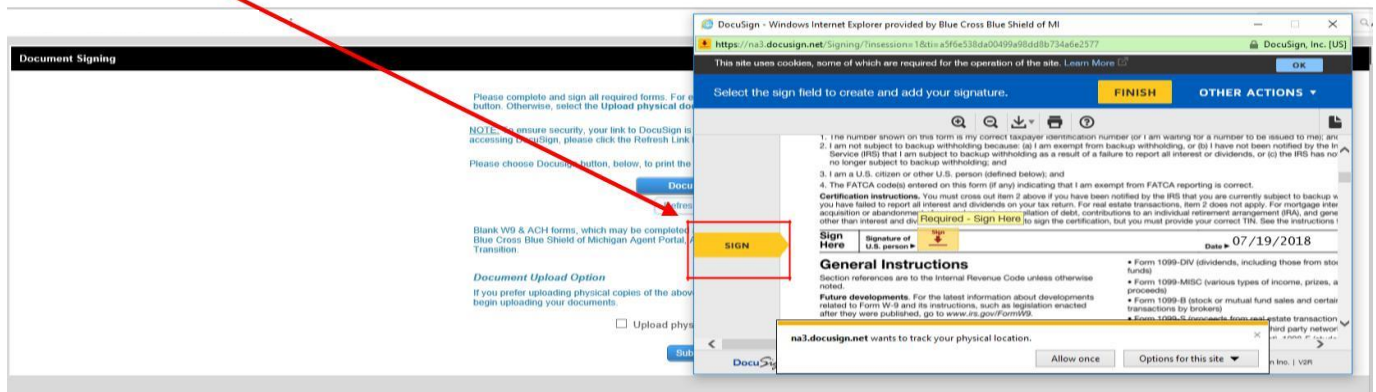
11. Click Continue.



12. Click Start



13. Click Sign to electronically sign the form.



Update Banking Information, *continued*

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).

Document Signing

DocuSign - Windows Internet Explorer provided by Blue Cross Blue Shield of MI

https://na3.docusign.net/Signing/7msessions=1&ti=8e10087a588043f9f1bd4babb7af434 DocuSign, Inc. [US]

This site uses cookies, some of which are required for the operation of the site. [Learn More](#)

Select the sign field

Adopt Your Signature

Confirm your name, initials, and signature.

* Required

Full Name*
test Agent

Initials*
TA

SELECT STYLE DRAW

PREVIEW [Change Style](#)

DocuSigned by:
test Agent
D49DDAE150F48E...

By selecting Adopt and Sign, you agree that the signature and initials will be the electronic representation of my signature and initials for all purposes when I (or my agent) use them on documents, including legally binding contracts - just the same as a pen-and-paper signature or initial.

ADOPT AND SIGN CANCEL

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

Document Signing

DocuSign - Windows Internet Explorer provided by Blue Cross Blue Shield of MI

https://na3.docusign.net/Signing/7msessions=1&ti=a5f6e38b8a190a98dd5b734a6e2577 DocuSign, Inc. [US]

This site uses cookies, some of which are required for the operation of the site. [Learn More](#)

Done! Select Finish to send the completed document.

FINISH OTHER ACTIONS

DocuSign Envelope ID: 341E2929-256E-4807-BEE2-1D238BD7D91CD

Form **W-9** Request for Taxpayer Identification Number and Certification
(Rev. November 2017)
Department of the Treasury
Internal Revenue Service

1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank.
Test Name

2 Business name/disregarded entity name, if different from above

3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only one of the following seven boxes.
☒ Individual/sole proprietor or single-member LLC ☐ C Corporation ☐ S Corporation ☐ Partnership ☐ Trust/estate
☐ Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ☐

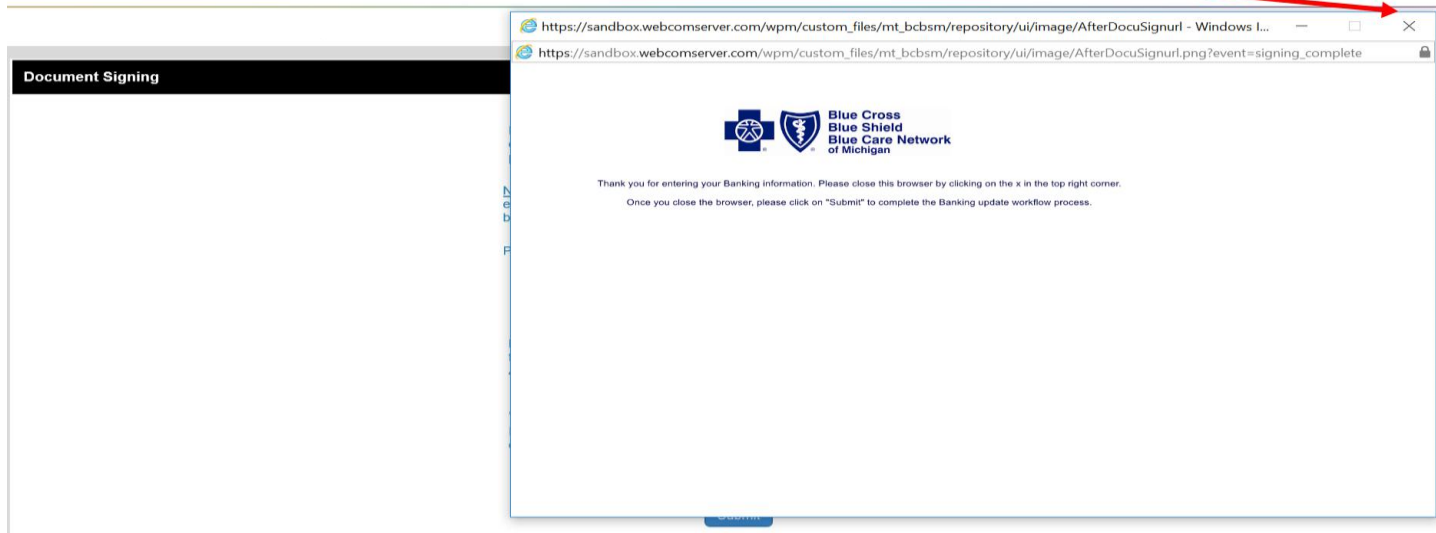
4 Exemptions is certain entities, instructions on 1
Exempt payee or Exemption from

Note: Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check

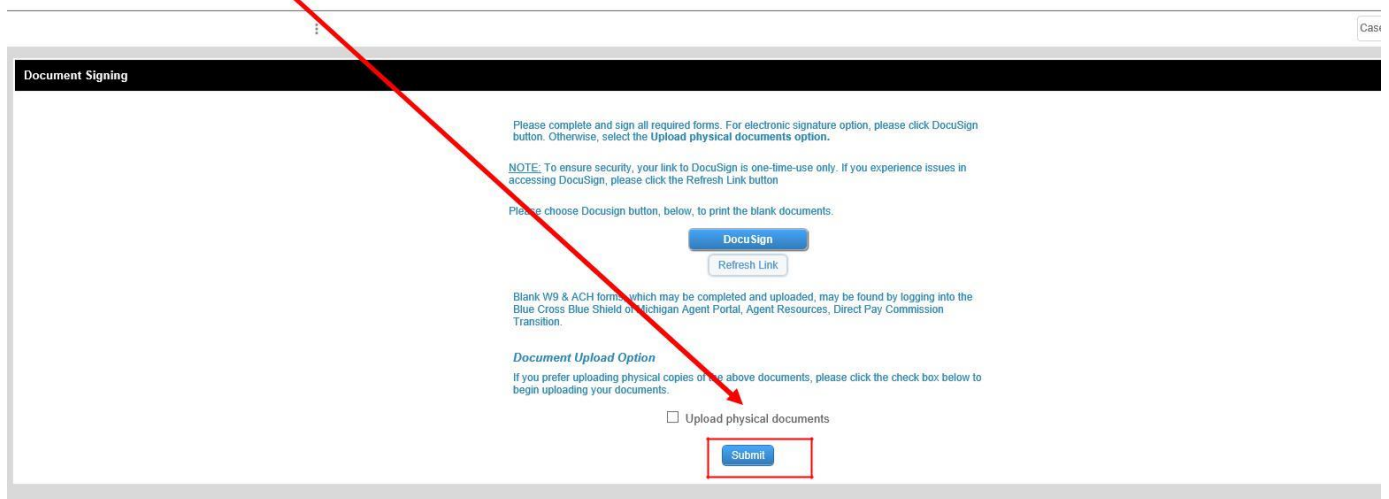
Change Language - English (US) Copyright © 2018 DocuSign Inc. | VQR

Update Banking Information, *continued*

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).



Update Banking Information, *continued*

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.

The screenshot shows a web application interface for 'Update Banking Information'. On the left, a sidebar contains fields: 'Created' (On 2018-07-19 10:24:22 AM), 'Assigned To' (BCBS Agent), 'Status' (Closed), 'Case Name' (Update Banking Information - W - 9 Form - MICHIGAN), and 'Producer'. The main area features a progress bar with steps: 1. Producer Application, 2. Preview Application, 3. Review DocuSign, 4. Closed (highlighted), 5. Exception Queue, and 6. Terminated. Below the progress bar, a message reads 'Thank you for Submitting your Banking form.' A table titled 'Attachments' lists one file: 'W-9 Form.pdf', which is highlighted with a red box. The table also shows the file was uploaded by 'BCBS Agent' on '2018-07-19 10:25:18 AM' and is '95,114 KB' in size.

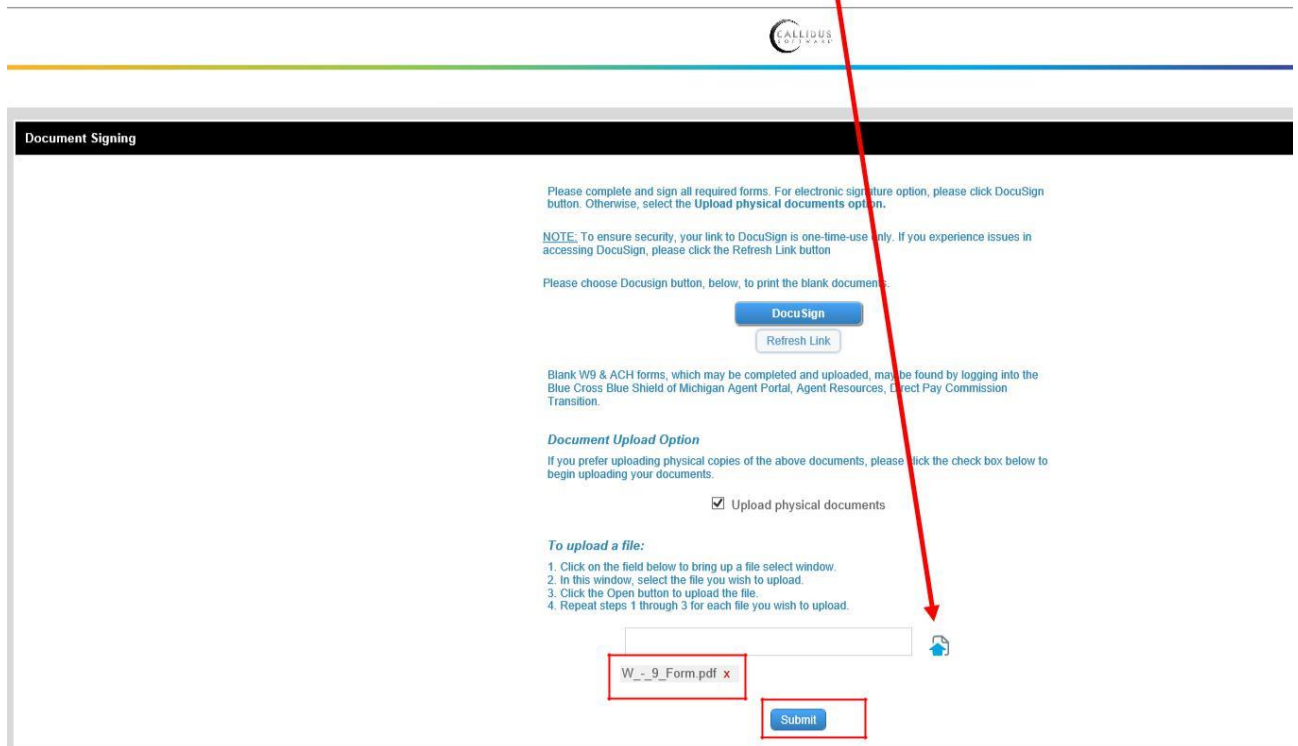
19. If you prefer to print and sign the banking form, select DocuSign button below and click on 'Other Actions' drop down and select the option 'Print and Sign'.

The screenshot shows the DocuSign 'Please Review & Act on These Documents' interface. The user is identified as 'BCBSM Blue Cross Blue Shield of Michigan'. The interface prompts the user to 'Please Sign the following documents. If you would like to print and sign, please click OTHER ACTIONS. Print the document and close this window. You can upload the file on the application.' Below this, there are two buttons: 'CONTINUE' and 'OTHER ACTIONS'. The 'OTHER ACTIONS' dropdown menu is open, showing options: 'Finish Later', 'Print & Sign' (highlighted with a red box), and 'Decline to Sign'. A preview of the 'W-9 Form (Rev. November 2017)' is visible in the background. At the bottom, a notification bar from 'na3.docusign.net' asks to track physical location, with 'Allow once' and 'Options for this site' buttons.

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

Update Banking Information, *continued*

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.



The screenshot shows a web page titled "Document Signing" with a "CALLIDUS" logo in the top right. The page contains instructions for document signing and uploading. A red arrow points from the instruction text in the first step to the upload icon in the "To upload a file:" section.

Please complete and sign all required forms. For electronic signature option, please click DocuSign button. Otherwise, select the Upload physical documents option.

NOTE: To ensure security, your link to DocuSign is one-time-use only. If you experience issues in accessing DocuSign, please click the Refresh Link button

Please choose DocuSign button, below, to print the blank documents

[DocuSign](#)
[Refresh Link](#)

Blank W9 & ACH forms, which may be completed and uploaded, may be found by logging into the Blue Cross Blue Shield of Michigan Agent Portal, Agent Resources, Direct Pay Commission Transition.

Document Upload Option
If you prefer uploading physical copies of the above documents, please click the check box below to begin uploading your documents.

☒ Upload physical documents

To upload a file:

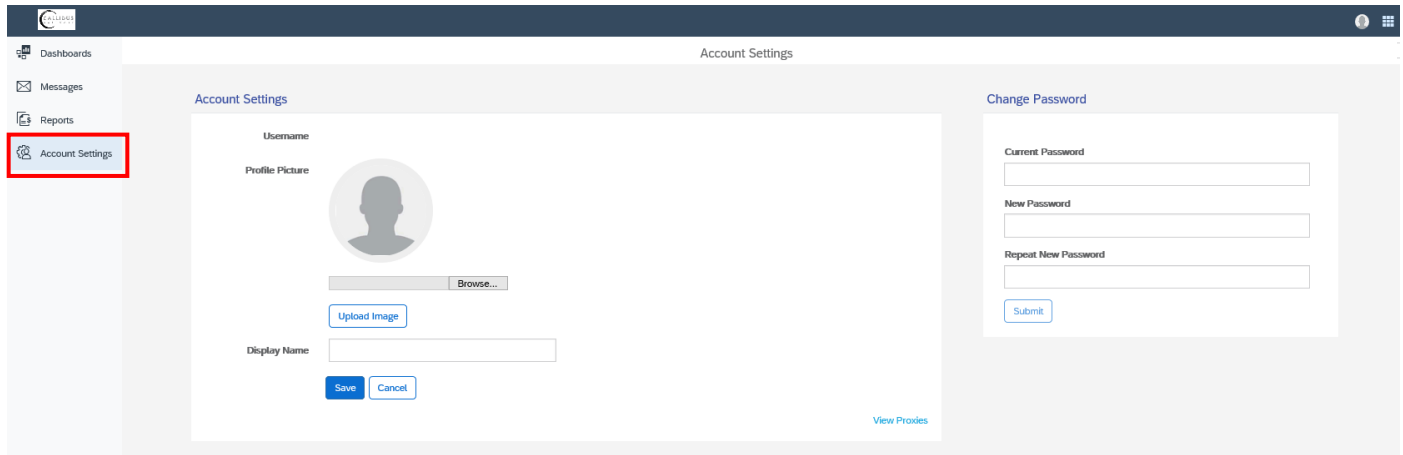
1. Click on the field below to bring up a file select window.
2. In this window, select the file you wish to upload.
3. Click the Open button to upload the file.
4. Repeat steps 1 through 3 for each file you wish to upload.

W-9_Form.pdf x 

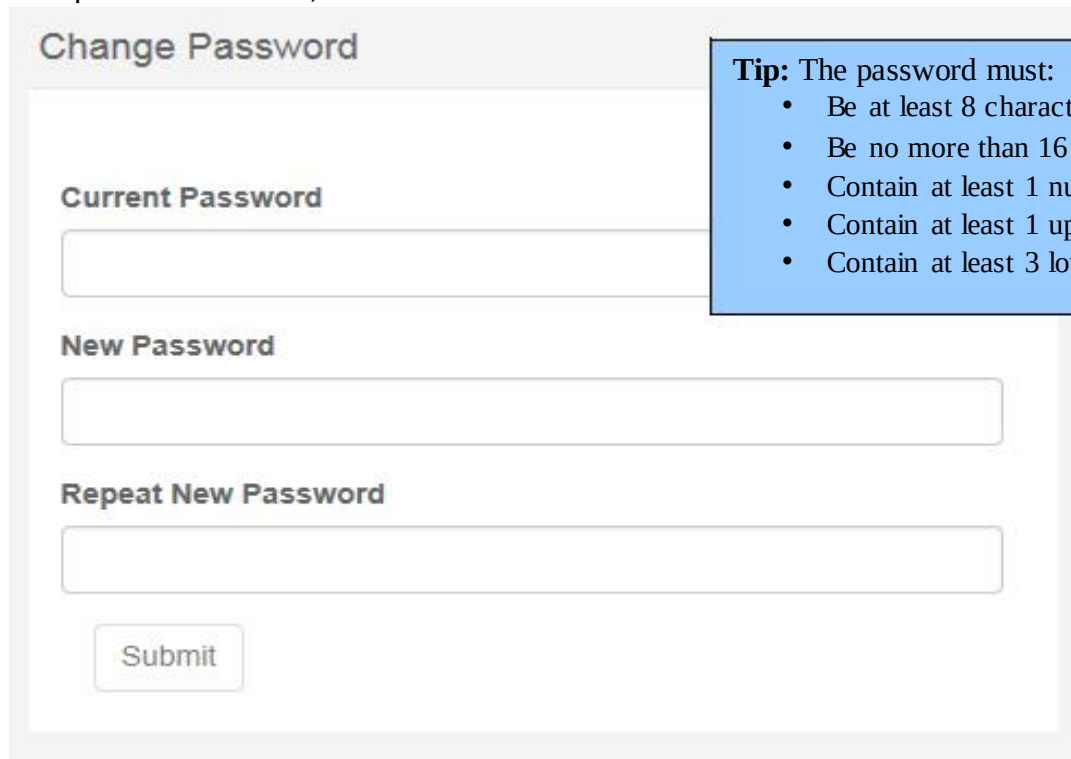
[Submit](#)

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.