



ADVANCING OUR PURPOSE

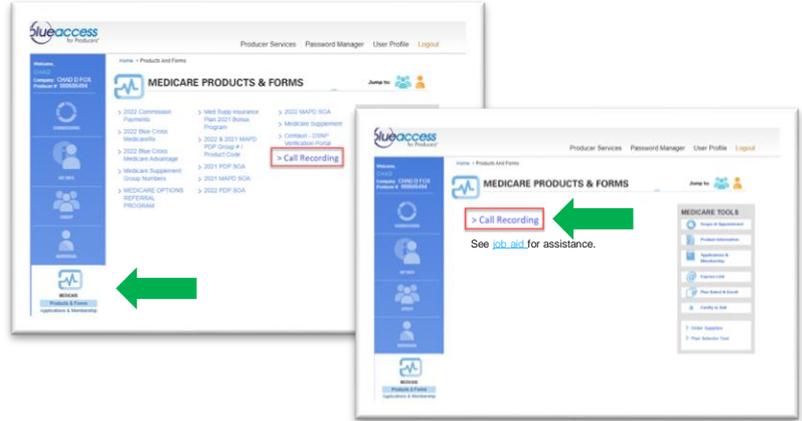
HCSC CONNECTURE CALL RECORDING JOB AID 1.0

BCBS Call Recording – Job Aid 1.0

Step 1

Log into your Blue Access for Producer Portal @ www.bcbsxx.com/producer

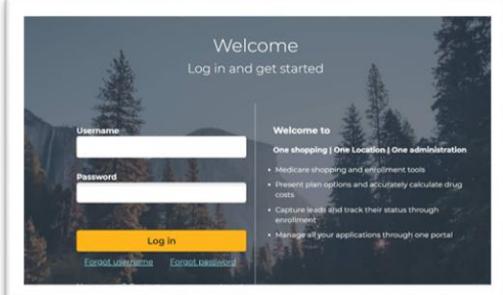
- Navigate to the “Medicare” icon and click to enter
- Click “Products & Forms”



Step 2

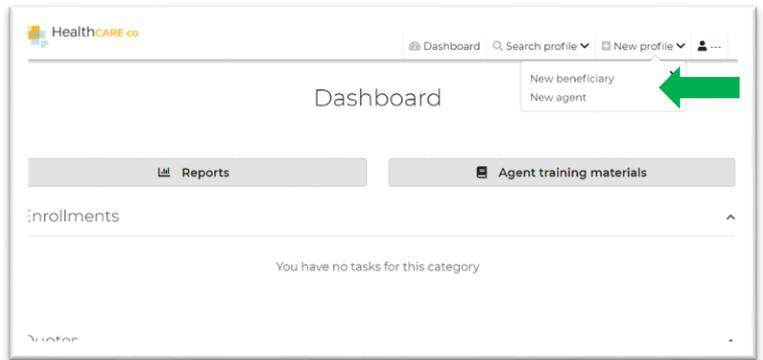
Log into the Connecture platform using your NPN & Password

- Note – First time users will be prompted to reset password



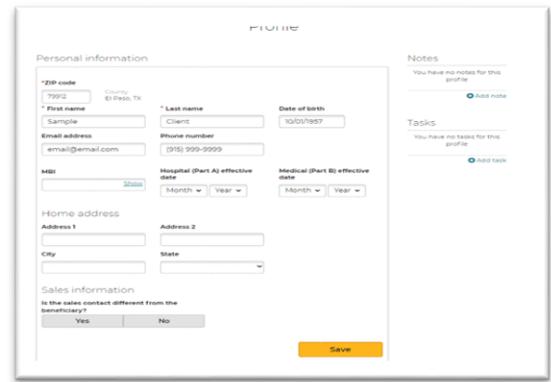
Step 3

Update your user profile if necessary and create beneficiary profiles from your dashboard



Step 4

Complete beneficiary profile and “Save”. Note once the profile is saved, you will be able to search & find prospects from your dashboard



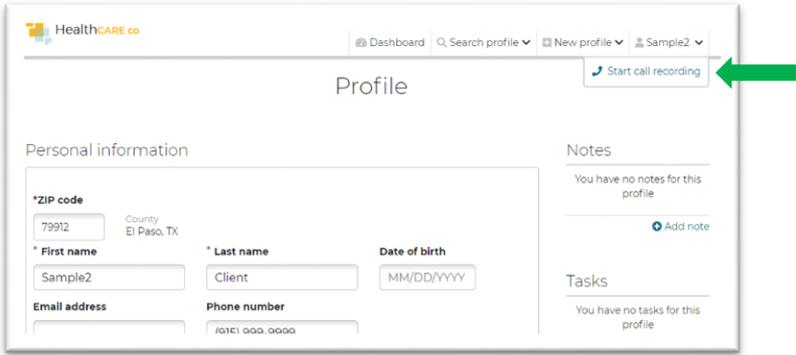
Beneficiary Profile must include:

1. Zip Code
2. First Name
3. Last Name
4. Phone number

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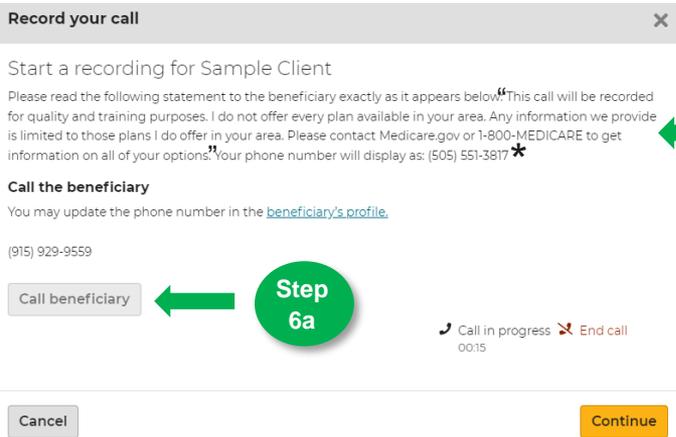
Step 5

Click “Start call recording” to begin the recording. See Step 6.



Step 6

Click “Call beneficiary” (6a). Once beneficiary answers call, then read disclaimer to caller (6b) and click “Continue”. See Steps 7.

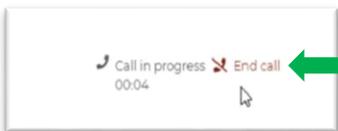


Step 6b

*Note IL, OK, MT will display an 888 number.

Step 7a

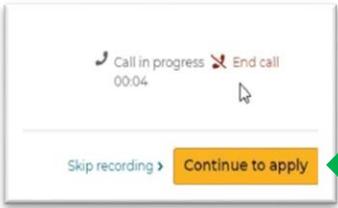
Record Call Only - Ensure recording window remains open. This allows the conversation to be recorded. Once your call is complete, click “End call”. **COMPLETE**



or

Step 7b

Record Call & Enroll - Ensure recording window remains open. This allows the conversation to be recorded. Once your enrollment is complete, click “Continue at apply”. See Step 8.



Step 7b 1

Enrollments can be submitted through the Connecture platform by clicking the “Continue to apply” link.

Step 8

Once your call is complete, click “End call”. **COMPLETE**

