

Direct Agent Electronic Appointment Onboarding Process

Agents requesting appointment with Baylor Scott & White Health Plan (BSWHP) should access our [onboarding link](#) to start the process.

Access the onboarding link and enter the appropriate information:

- **Individual/Entity:** Select “Individual” for an agent.
- **FMO Affiliation:** Defaults to “None.” This field does not apply to independent agents. If you are affiliated with an FMO, please contact us at 866.781.7008.
- **First Name:** Enter the agent’s first name.
- **Entity/Last Name:** Enter the agent’s last name.
- **Contact Email:** Must be a unique email for the agent to receive their login information.
- **SSN:** Enter the agent’s social security number then hit the tab key.
- **National Producer Number** will automatically populate once the social security number is entered. (Please verify NPN is correct.)
- Click **Create** to create a login that will be emailed to the agent to complete their onboarding packet.

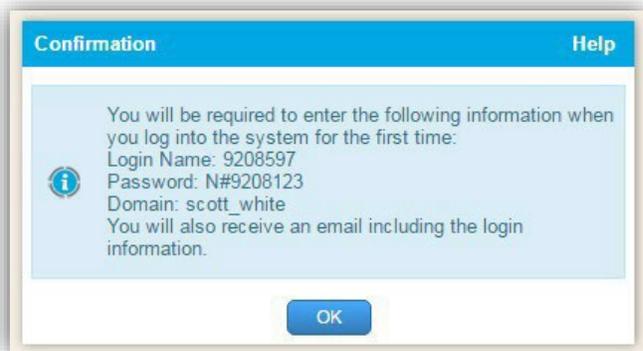
Contract Onboarding

Individual/Entity *	--select--	
FMO Affiliation *		
First Name *		
Entity/Last Name *		
Please fill out a personal Email address here.		
Contact Email *		
<small>e.g. johndoe@site.com</small>		
SSN *		
National Producer Number		
Please review the information on the page before proceeding to your account creation.		
Create		
<small>For assistance please contact Agent Licensing at 866-781-7008 or SWHPLicensing@BSWHealth.org</small>		

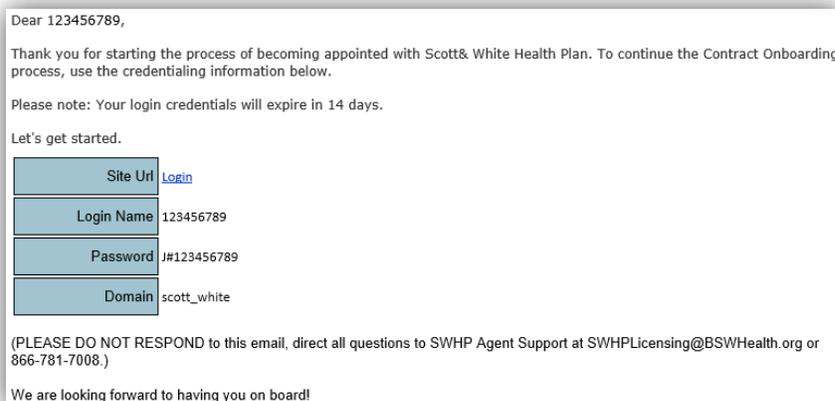
WELCOME to Baylor Scott & White Health Plan's Contract Onboarding System.

1. An informational-only pop-up window will show. Select **OK**.

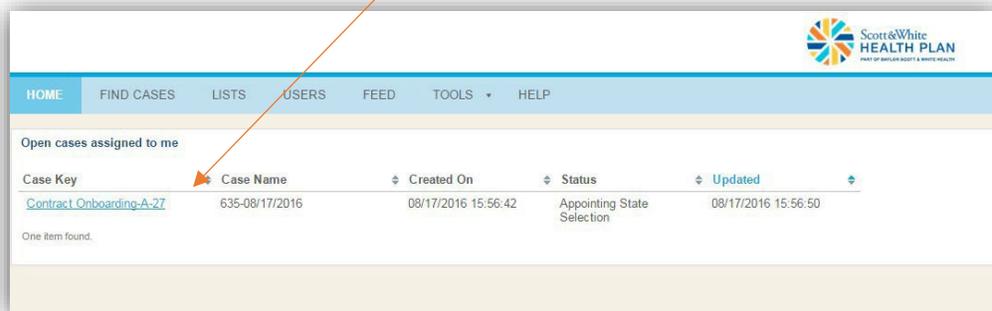
An email with personalized login information will be sent to the agent or agency from ScottWhite@Onboarding.com. (PLEASE DO NOT RESPOND to this email; instead, direct all questions to BSWHP Agent Support at HPLicensing@BSWHealth.org or 866.781.7008.)



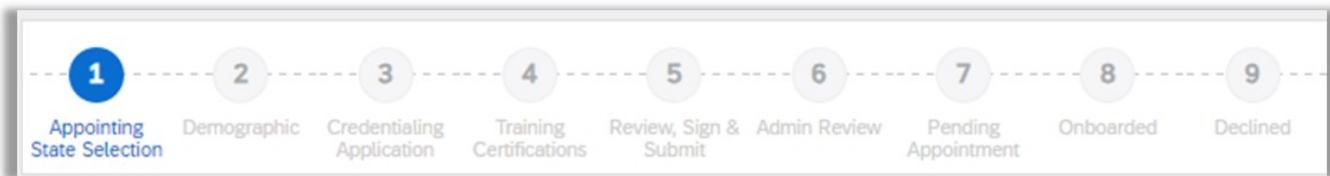
2. The email recipient entered on the creation screen will receive a login email. Here's an example:



3. Once logged in, the agent will see a "Case" has been created. The case name will be the NPN and the date created.
4. Agents will need to click on the **Case Key** (onboarding link) to continue the contract appointment process.



5. The next steps for the agent/agencies are bulleted below. Each agent will start at the “Appointing State Selection” and continue through “Review, Sign, & Submit” for submission.



- **Appointing State Selection:** Attest to having a license with the Texas Department of Insurance (TDI).
 - If the user does not have a valid “Life, Accidental, Health and HMO” license with TDI, they cannot move forward.
 - **Demographic:** Validate contact information.
 - **Credentialing Application:**
 - **License & Appointment:** Select the line of business(es) to sell and market products.
 - **Background Information:** Answer questions and applicable supporting information.
 - **Insurance:** Error & Omissions Insurance information and declaration page upload.
 - **Banking Information:** Information about where to pay commissions.
 - **Acknowledgment:** Review and electronically sign acknowledgment before continuing.
 - **Training Certifications:** For Medicare only; attach a copy of your current AHIP certificate and complete training requirements.
 - **Review, Sign, & Submit:** Review and edit information, e-sign each DocuSign document and sign to move your request to Admin Review for Baylor Scott & White Licensing Team.
6. Once all steps have been completed, our licensing admin will review for completeness and request any applicable missing information. If the onboarding request is complete without missing information, a TDI request for appointment will be sent.

Once appointed, system setup will be processed. This process normally takes about 3-7 business days from submission for Baylor Scott & White Health Plan appointments.

Commission Payments

Commissions for the policies sold by appointed agents are paid based on the schedule in the contract.

Questions? Please contact us at HPLicensing@BSWHealth.org or 866.781.7008.