BlueCross BlueShield of New Mexico

Request Center Tool User Guide

February 2026

488115.1023

Contents

Quick Start Summary

1) Select the request type that matches what you want to do:
   - Enroll New Group
   - Enroll Associations
   - SG Existing Group Changes – Fully Insured Only SG Existing Group Changes – Fully Insured Only *(Renewal Paperwork, Address Change, Grandfathered Certification, etc.)*
   - Blue Balance Funded Renewal *(BBF Renewal & Existing Fully Insured to BBF)*
   - Existing Blue Balance Funded to Fully Insured
   - COBRA or State Continuation
   - COBRA – HCSC Admin
   - Regulatory Data Update *(MSP & Average Employee Count (AEC))*

2) Enter the requested information into the form

3) Add all required document attachments

4) Save and Submit your request

5) Keep an eye on your email for updates

6) Use Log button to view comments entered by the internal processor

7) Use the History button on each request to follow the group's progress

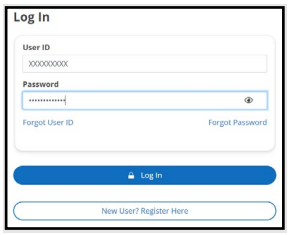
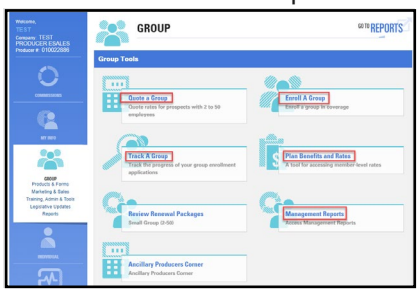
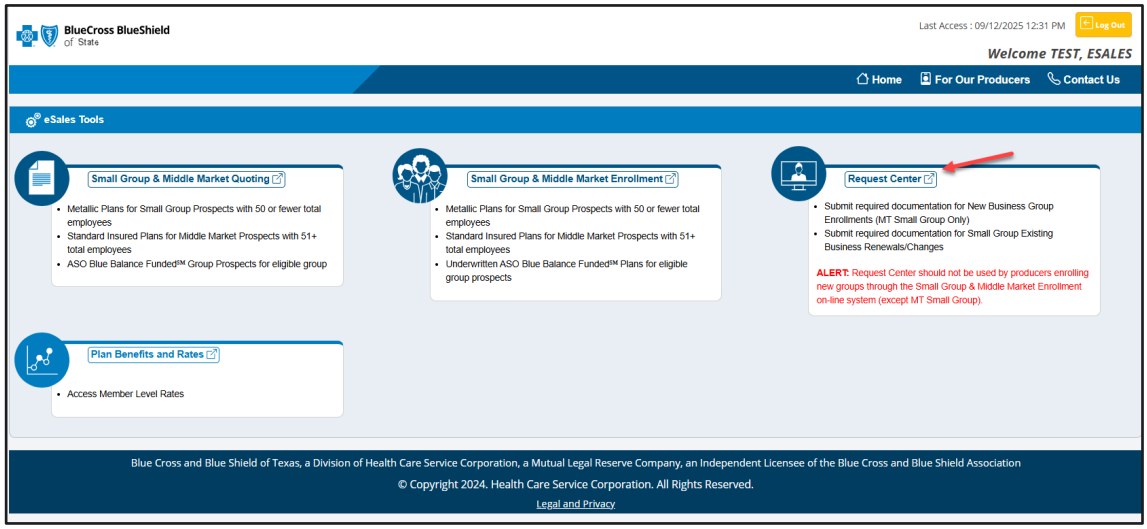
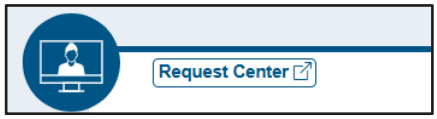
Important:

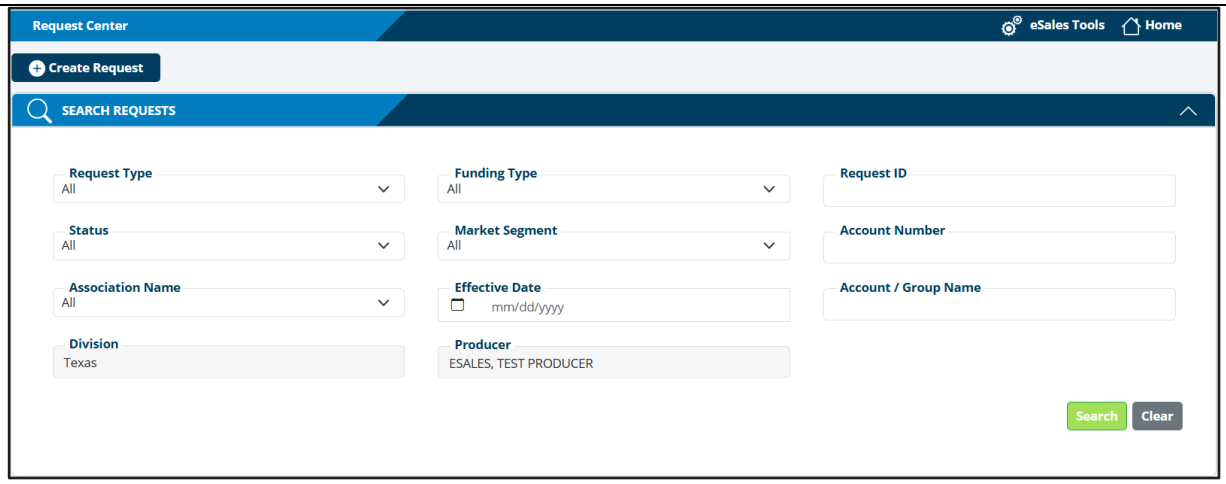
- If using the Enrollment Tool to enroll a new group, do not use Request Center
- Double-check the email you entered is where all request updates should go
- Make a note of your Request ID for easy follow-up

Step-by-step examples of all request types are shown below

For technical support, email SGMM_TechSupport@hcsc.com

Welcome to the Request Center

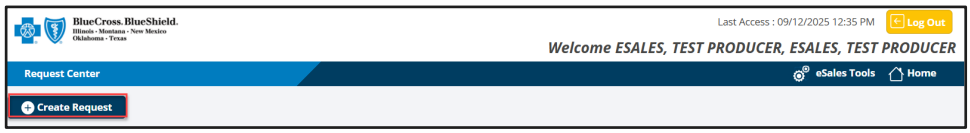
Step	Action
Log In to Group Sales	Click on (or enter) this URL: https://www.bcbsnm.com/producer. Log in to Blue Access for Producers℠ (BAP℠).  Result: BAP navigates to the **Welcome** page.
Group Sales Tools	Click on one of the Group Tools:  eSales homepage will be displayed. 
Access Request Center Home Page	Click on the Request Center link:  ***Note – Contact your internal Administrator to delegate access to appropriate personnel.** The Request Center Home Page window opens.



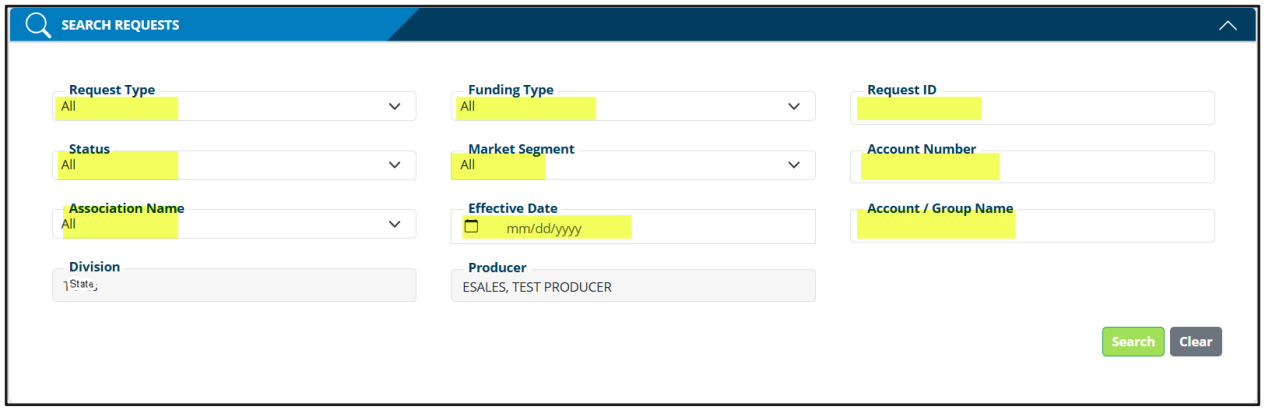
Request Center Home Page

The Request Center home page contains the following:

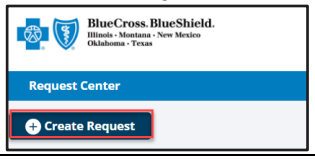
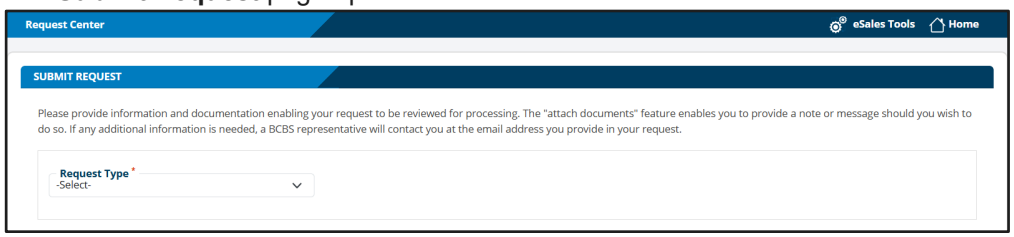
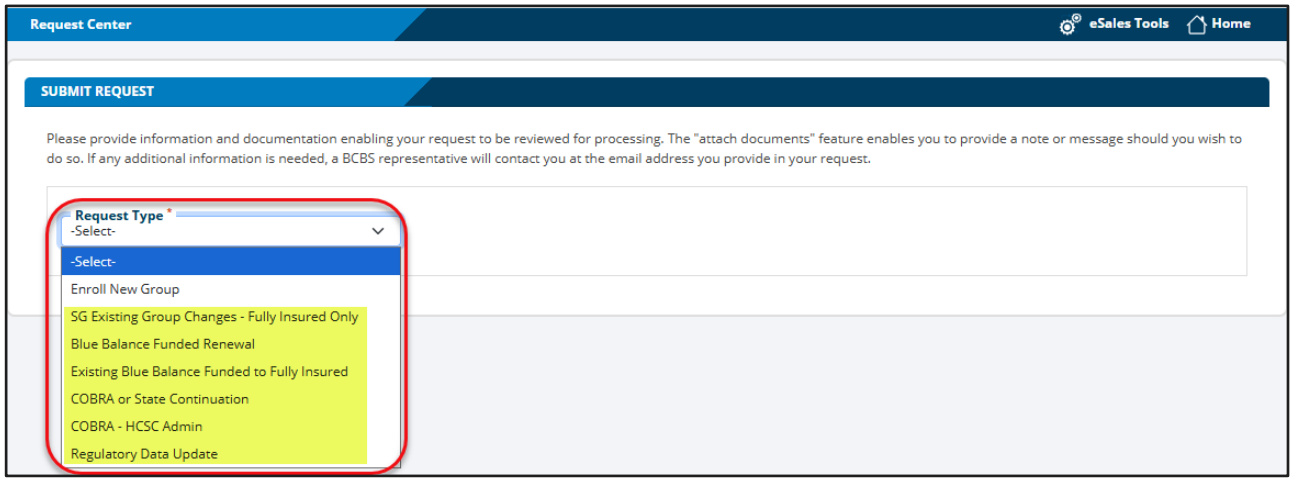
Create Request: this button is used to initiate an enrollment request.

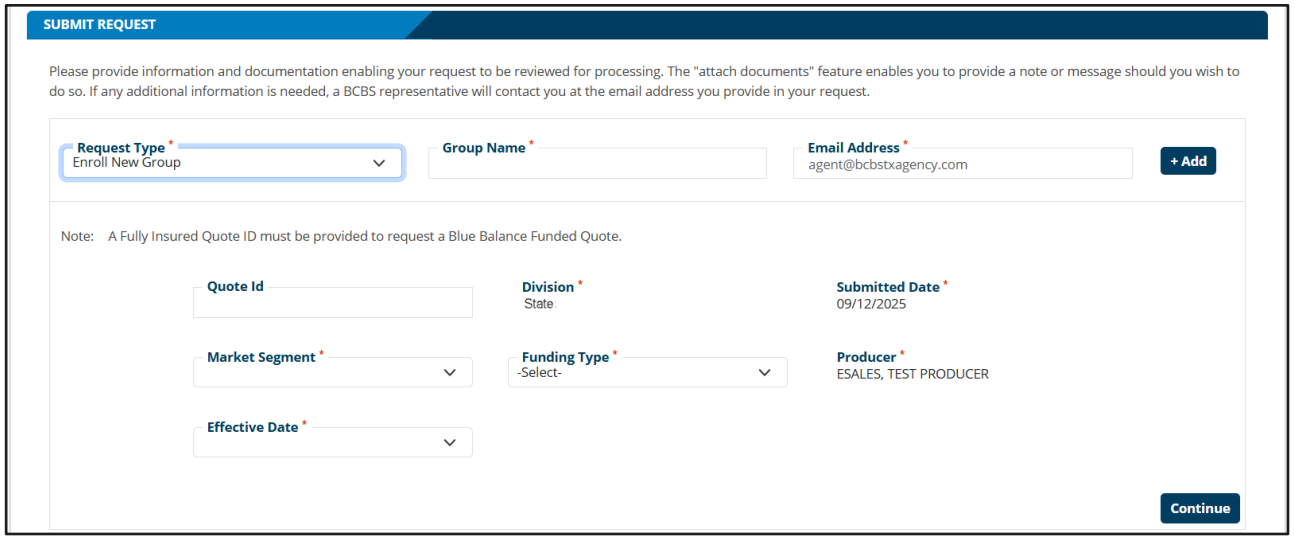


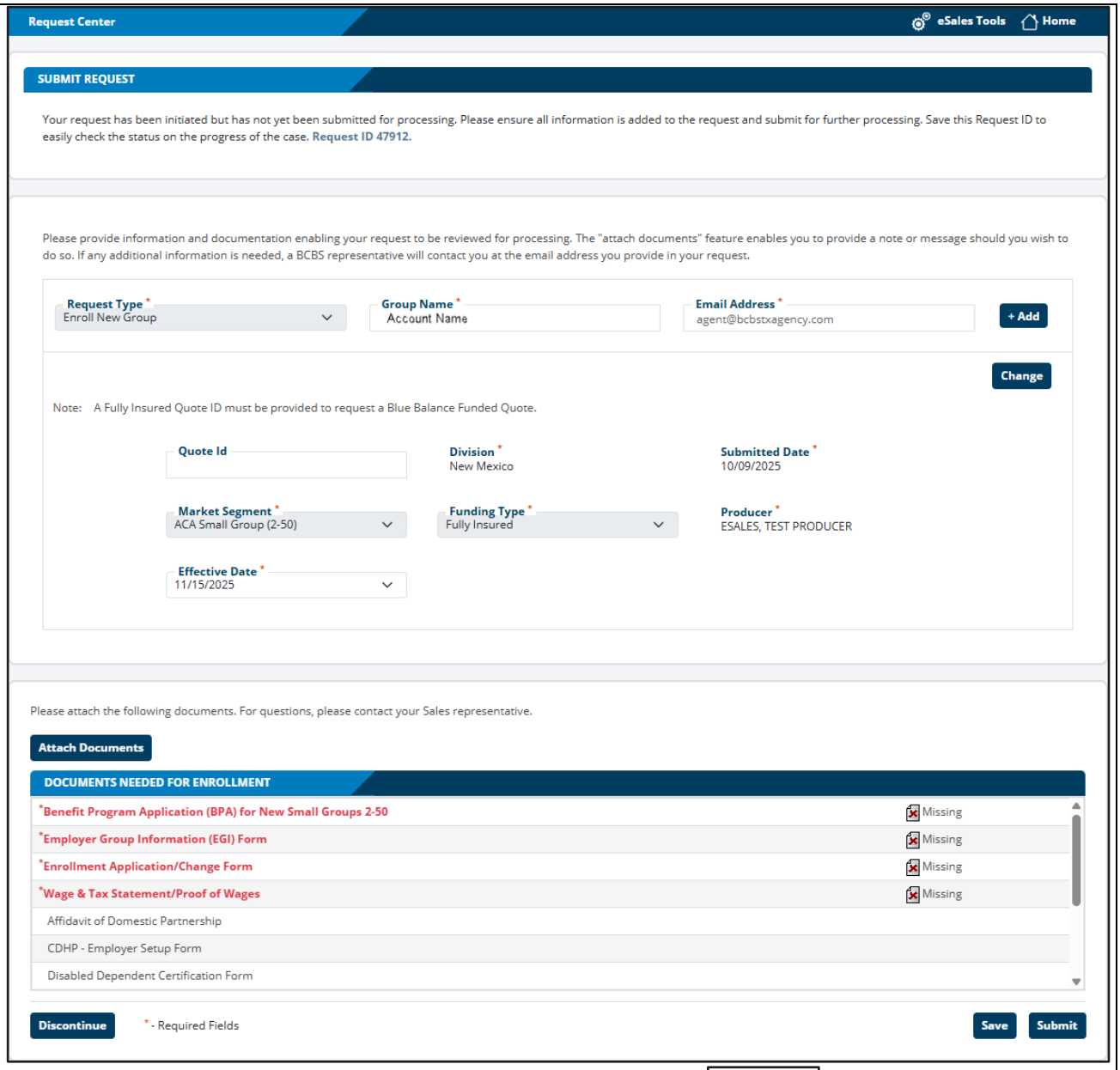
Search Requests view contains the following:



- **Search Request:** Allows you to search by one of the following:
- **Request Type:** Defaults to All; use the drop-down to select different request type
- **Division:** Defaults to your state
- **Account / Group Name:** Type in name of group
- **Producer:** Defaults to your ID
- **Request ID:** Enter request ID (if applicable)
- **Market Segment:** Defaults to All; use the drop-down to select the appropriate market segment (such as ACA Small Group (2–50), Small Group (10–50) Middle Market (51+), MEWA)
- **Account Number:** Type in the group's account number
- **Effective Date:** Enter or click on calendar icon to select effective date (mm/dd/yyyy)

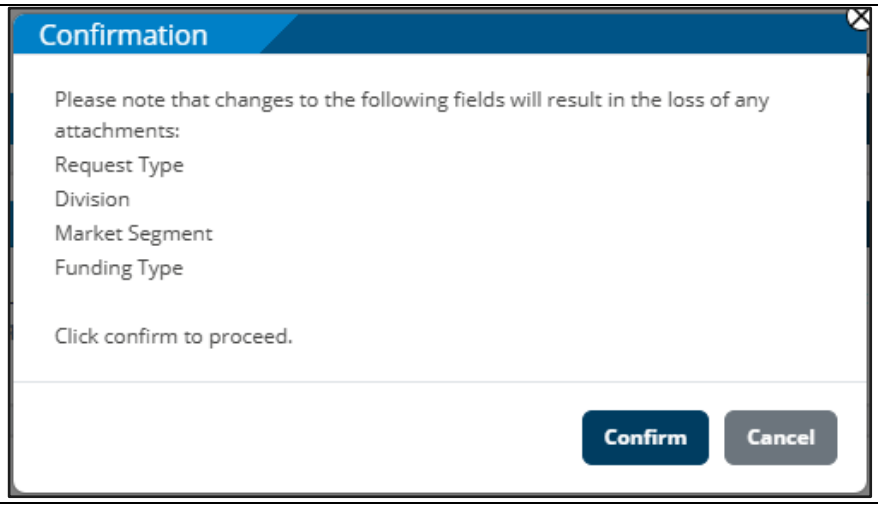
	• **Funding Type:** Defaults to All; use the drop-down to select appropriate funding type (such as Fully Insured, ASO Blue Balance Funded℠) • **Association Name:** Used for Enrolling Associations • **Status:** Defaults to All; use the drop-down to select appropriate status (Request Accepted for Submission, Request Discontinued for Submission, Request Info Needed, Request Initiated, Request Pending Internal Review, Std Mkts Account Processing in Progress, etc.)
Creating a Request	From the **Request Center Home** page, click on **Create Request** button. 
Request Page	The **Submit Request** page opens.  Note: To return to the Request Center home page, click the **Home** button on the top right
Available Request Types	**Request Type** Use the drop-down and select a Request Type:  **Request Types:** Enroll New Group SG Existing Group Changes – Fully Insured Only Blue Balance Funded Renewal Existing Blue Balance Funded to Fully Insured COBRA or State Continuation Regulatory Data Update Note: Enroll New Group and Enroll Associations were existing request types

Enroll New Group	The Submit Request window expands and contains additional required fields when the following Request Type is selected: **Enroll New Group**  • **Request Type:** Select a request type from the drop-down • **Group Name:** Enter the group name listed on paperwork • **Email Address:** Enter your email address in this field **Note:** Additional email addresses can be entered by clicking on the +Add button • **Quote ID:** Enter Quote number (if applicable) • **Division:** Defaults to your state • **Submitted Date:** Defaults to today's date • **Funding Type:** Use the drop-down and select Fully Insured first (selecting Funding Type first will open Market Segment drop-down) • **Market Segment:** Use the drop-down and select ACA Small Group (2–50) • **Producer:** Defaults to user • **Effective Date:** Use the drop-down to select appropriate effective date of new group Once all required information is entered, click Continue.  **PLEASE NOTE:** This Request Type is not needed if group is being enrolled through Enrollment Tool.
Required Documents	A message populates in the Submit Request window stating Your request has been initiated but has not yet been submitted for processing. Please ensure all information is added to the request and submitted for further processing. Save this Request ID to easily check the status on the progress of the case. A Request ID number is assigned, and the Documents Needed for Enrollment pane opens for Request Type: **Enroll New Group**



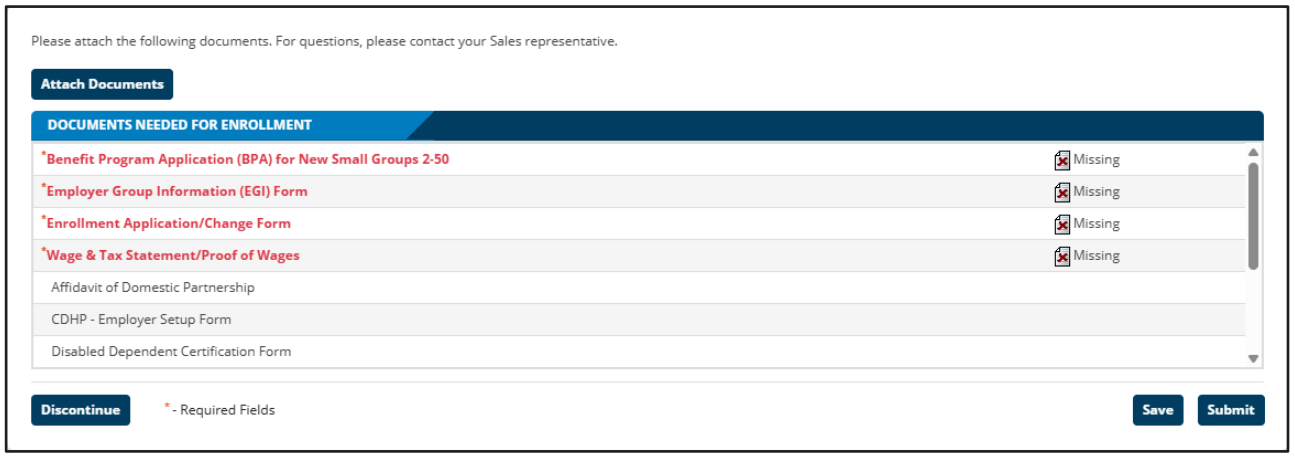
Note: If a change is needed for Effective Date field click on **Change**. 

IMPORTANT NOTE: If changes are needed in these fields, the change should be completed PRIOR to attaching any documents to the request.
Once the Change button is selected, a confirmation message populates letting you know that changes made to specific fields will result in the loss of any attachments.

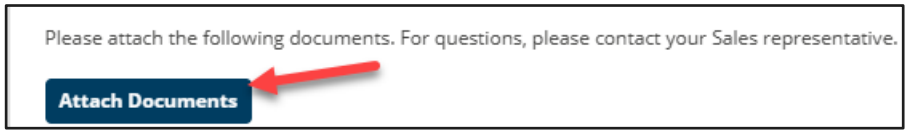


Attach Required Documents

In the **Documents Needed for Enrollment** section, all required documents will appear in RED font and have an asterisk (*) on the far-left side:



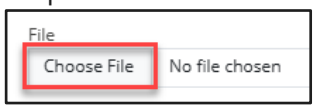
To attach documents, click on the **Attach Documents** button.



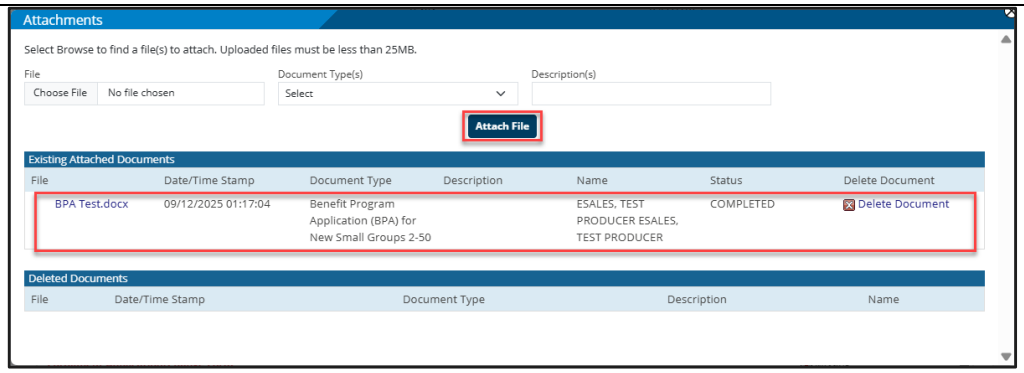
Result: The Attachments window opens.

Attach Required Documents

Click the **Choose File** button; locate the drive and folder where the documents are saved and select the file to upload.

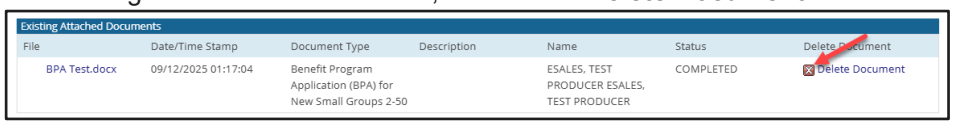


Select from the Document Type(s) drop-down and click on the **Attach File** button.
The attached document will show in the **Existing Attached Documents** field.

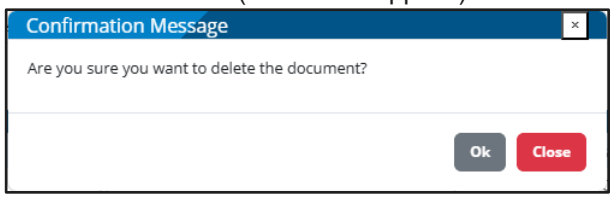


Delete Documents

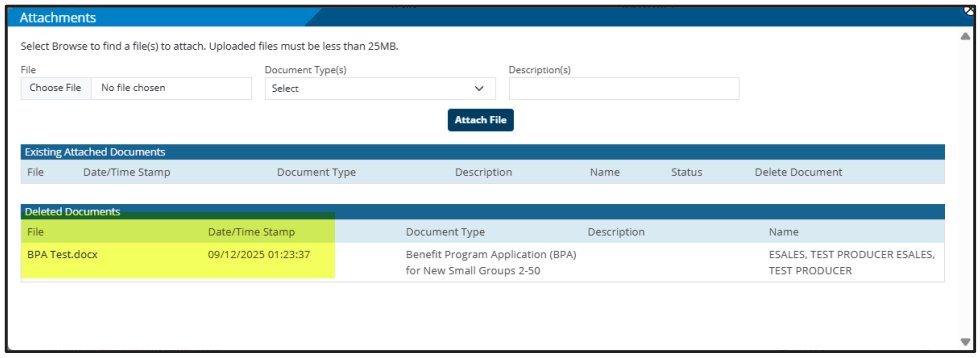
If the wrong document was attached, click on the **Delete Document** link to remove it from the list.



Result: A confirmation message populates asking if you are sure you want to delete the document. Select OK or Close (whichever applies).



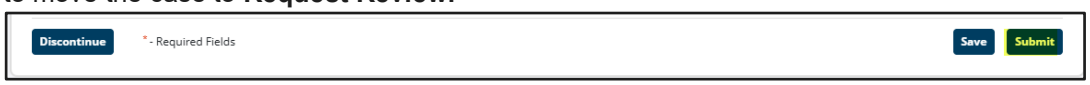
Result: The deleted document will then show in the **Deleted Documents** section.



Note: Deleted documents will not transfer from Request Center to enrollment, however they will be retained in Request Center for audit purposes. If paperwork for another group was accidentally attached, you must discontinue the request and start over. Deleted documents can still be viewed.

Submit Request

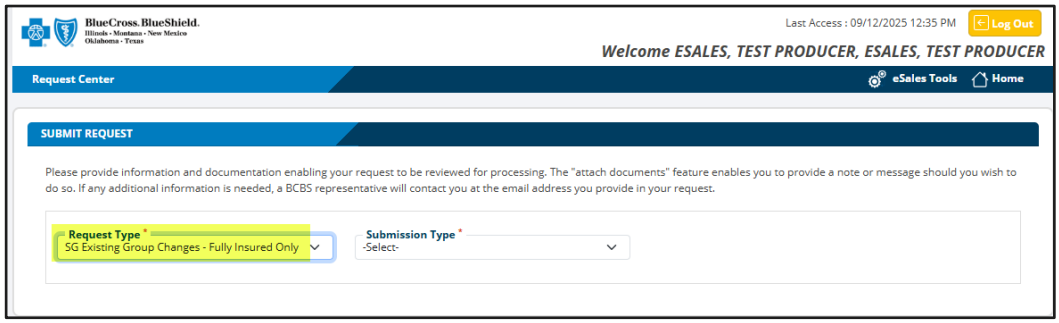
Once documents have been attached, click on the (X) in the top right-hand corner of the Attachments window to close. Click the **Save** button to verify all information is entered correctly and click **Submit** button to move the case to **Request Review.**



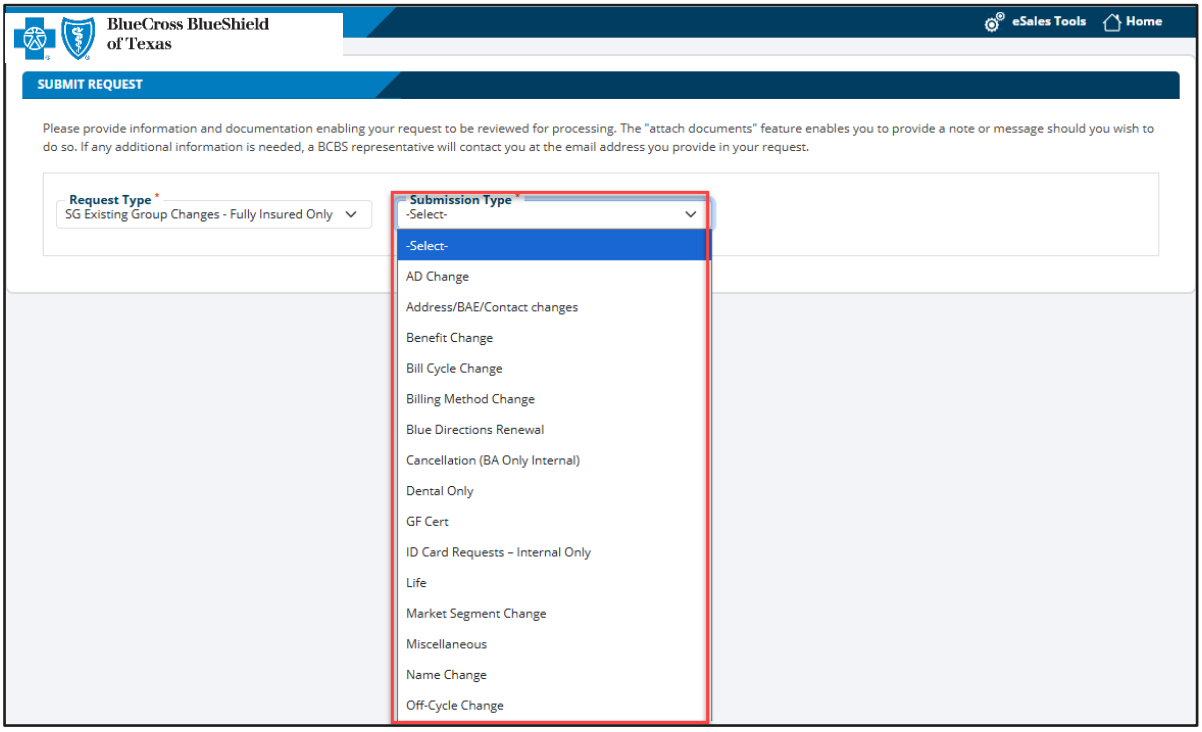
Result: Request Submitted message populates.

SG Existing Group Changes – Fully Insured Only

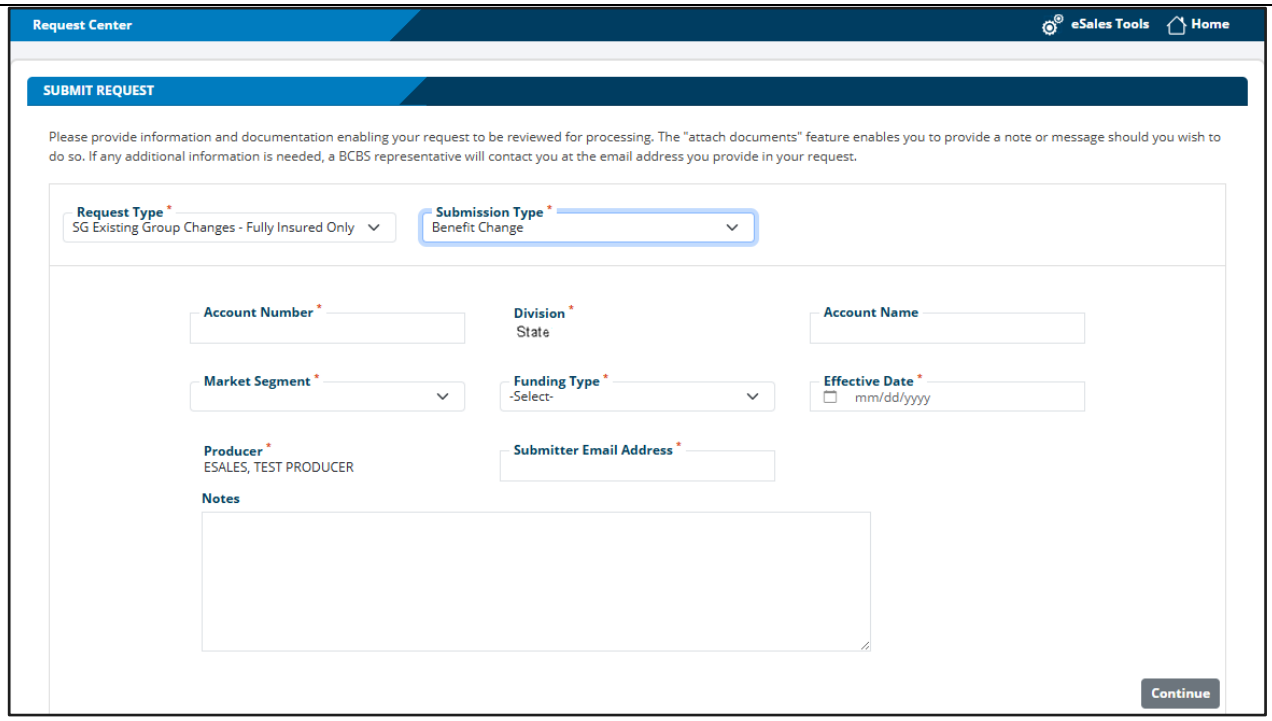
The Submit Request window expands and contains additional required fields when the following request type is selected: SG Existing Group Changes – Fully Insured Only



Select a Submission Type from the drop-down:



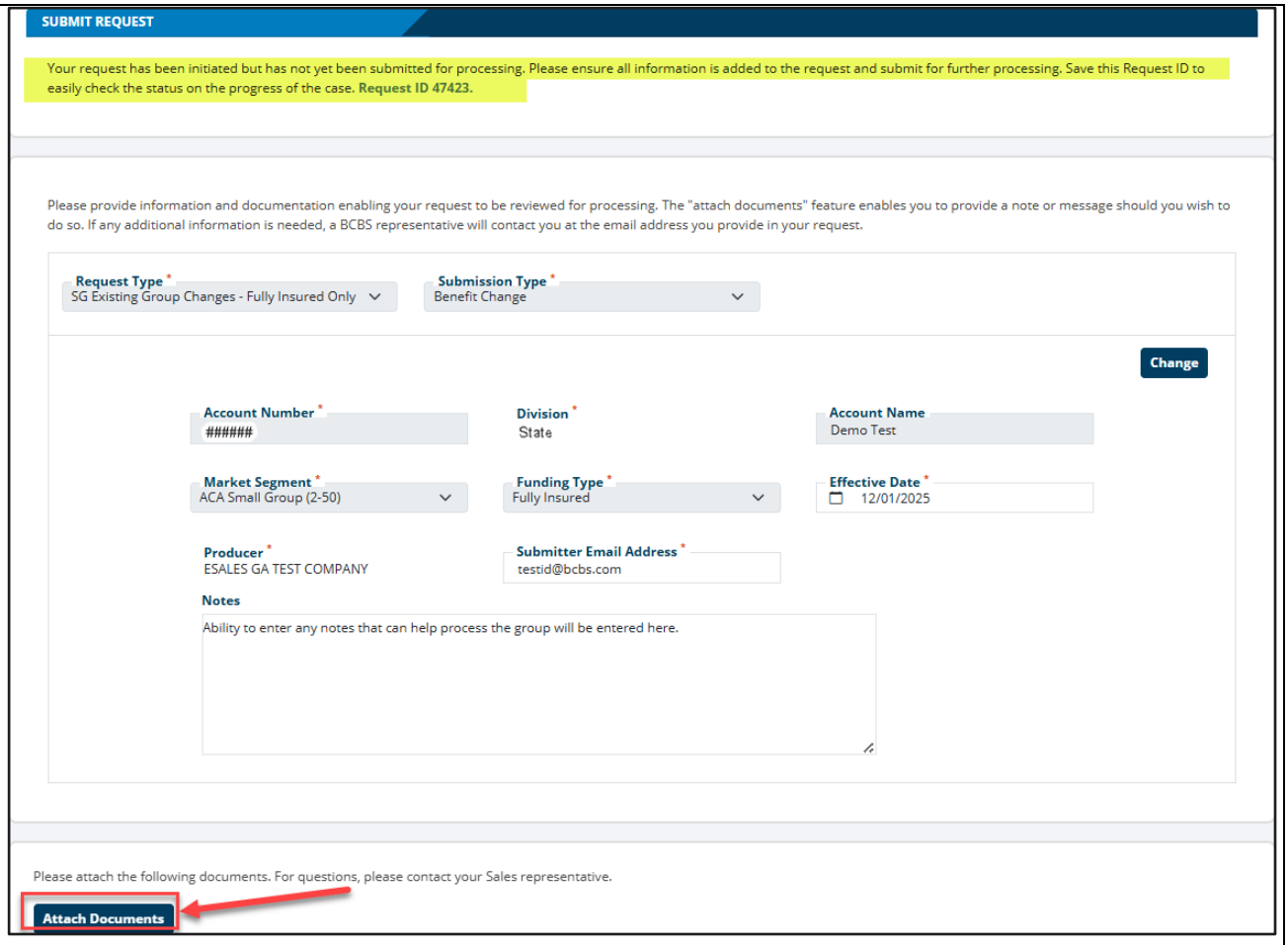
Result: Following selection of Submission Type, the following fields will be displayed:

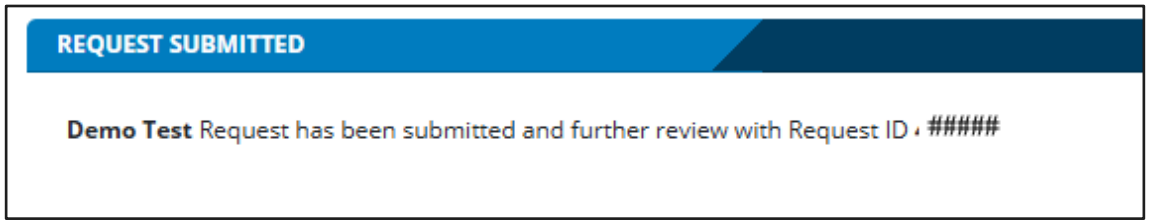
<table>
<tr>
<td></td>
<td>


Account Number: Enter the account number
Division: Defaults to your state
Account Name: Populates when account number and division are entered
Funding Type: Populates when account number and division are entered
Market Segment: Populates when account number and division are entered
Effective Date: Enter or click on calendar icon to select effective date (mm/dd/yyyy)
Submitter Email Address: Type in the email address of the person submitting the form
(Please note: this person will receive all communication on the progress of the submission)
Notes: Type in notes if needed (optional)

Once all required information is entered, click Continue. 

</td>
</tr>
<tr>
<td>Submit Request</td>
<td>A message populates in the Submit Request window stating Your request has been initiated but has not yet been submitted for processing. Please ensure all information is added to the request and submit for further processing. Save this Request ID to easily check the status on the progress of the case. A Request ID number is assigned, and the Documents Needed pane opens for Request type: SG Existing Group Changes – Fully Insured Only
Follow the attach document step above to attach any documents and click on Save and Submit the request.</td>
</tr>
</table>

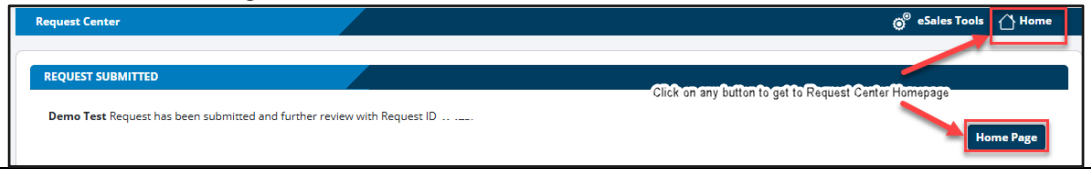


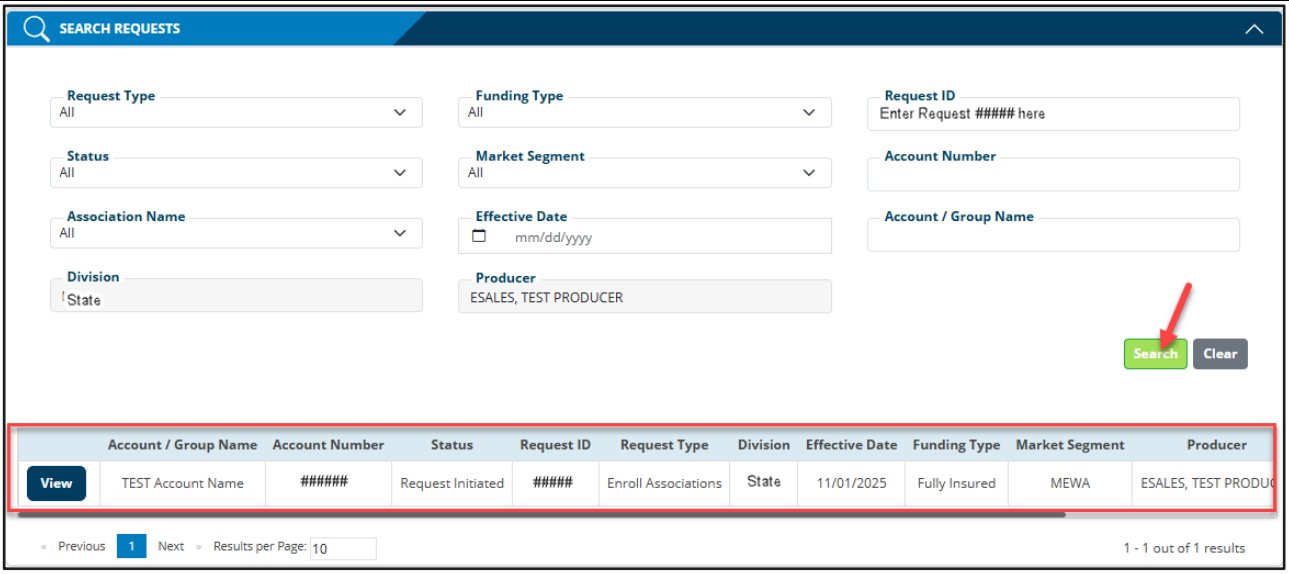


The request is now submitted for review.

Review Request

To review your request, search for it on the Request Center Homepage by clicking the Home Page button or Home Icon and using criteria available and click **Search**.

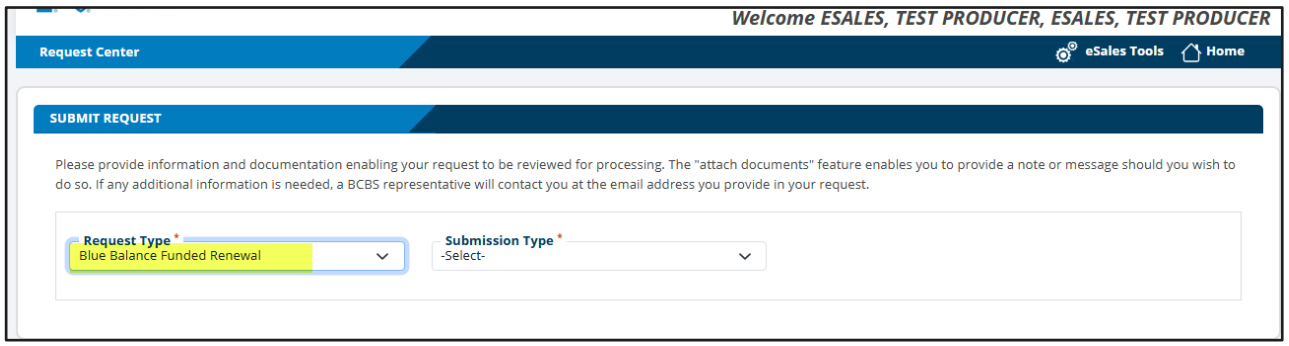




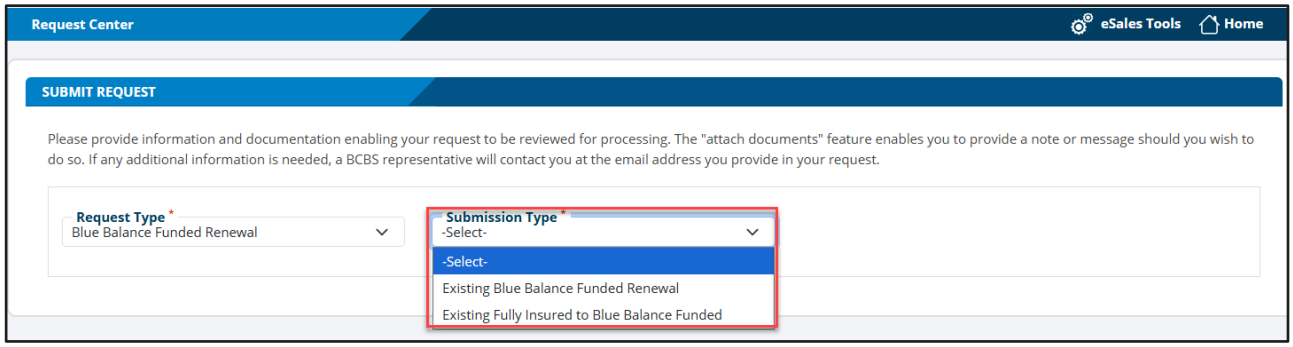
To view information, you can select the **View** button next to the account.

Blue Balance Funded Renewal

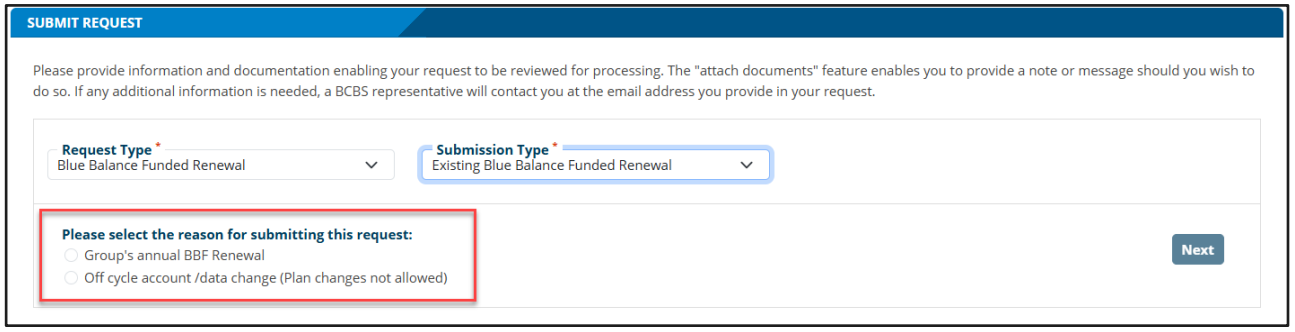
The Submit Request window expands and contains additional required fields when the following request type is selected: **Blue Balance Funded Renewal**



Select a Submission Type from the drop-down:
Existing Blue Balance Funded Renewal – when renewing or making plan plan on existing Blue Balance Funded
Existing Fully Insured to Blue Balance Funded – used when switching funding type

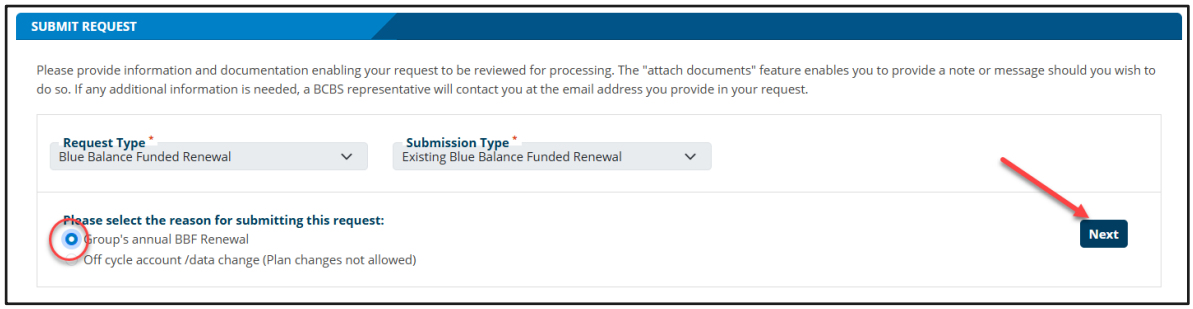


Result: Following selection of Submission Type, the following fields will be displayed:

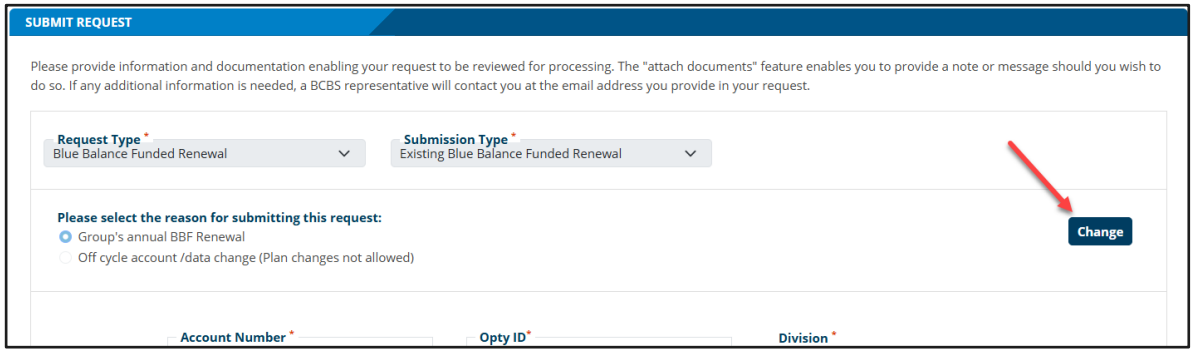


User to select Group's annual BBF Renewal for renewals with or without plan changes.
User to select Off cycle account/data change if account changes differ from Renewal Date.

Once option is selected, Next button will be available. Please click Next.



If incorrect reason was selected, **Change** button will appear, if clicked, confirmation message will be displayed. User can then select the correct reason for submitting the request.



Following selection of **Group's annual BBF Renewal**, the following fields will be displayed:

- **Account Number:** Enter the account number
- **Opty ID:** Can be found on the renewal exhibit in the top left-hand corner
- **Division:** Defaults to your state
- **Account Name:** Populate when account number, opty ID and division are entered
- **Funding Type:** Populates when account number, opty ID and division are entered
- **Market Segment:** Populates when account number, opty ID and division are entered
- **Effective Date:** Populates when account number, opty ID and division are entered
- **Submitter Email Address:** Type in the email address of the person submitting the form (Please note: this person will receive all communication on the progress of the submission)
- **Notes:** Type in notes if needed (optional)

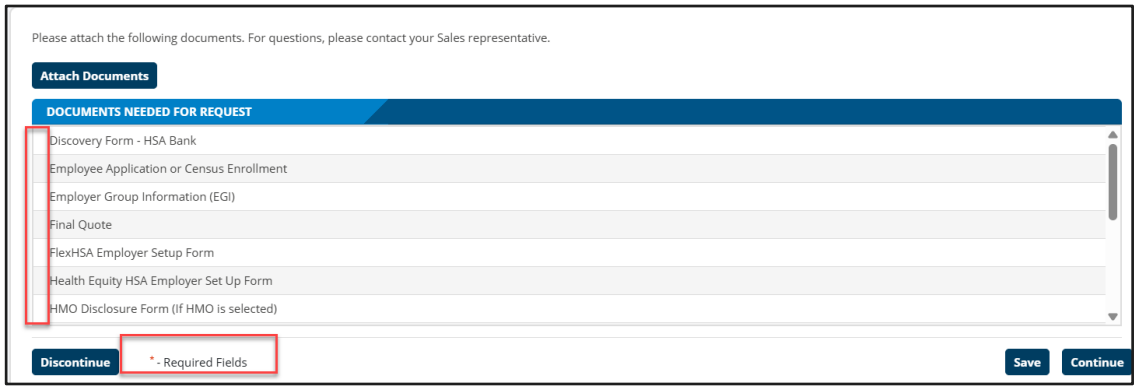
Following the selection of **Off cycle account/data change (Plan changes not allowed)**, the following fields will be displayed:

- **Account Number:** Enter the account number
- **Division:** Defaults to your state
- **Account Name:** Populate when account number is entered, field is open for edit
- **Funding Type:** Populates when account number is entered, drop-down is open for selection
- **Market Segment:** Populates when account number is entered, drop-down is open for selection
- **Effective Date:** Use the drop-down to select appropriate effective date of group
- **Submitter Email Address:** Type in the email address of the person submitting the form
  (Please note: this person will receive all communication on the progress of the submission)
- **Notes:** Type in notes if needed (optional)

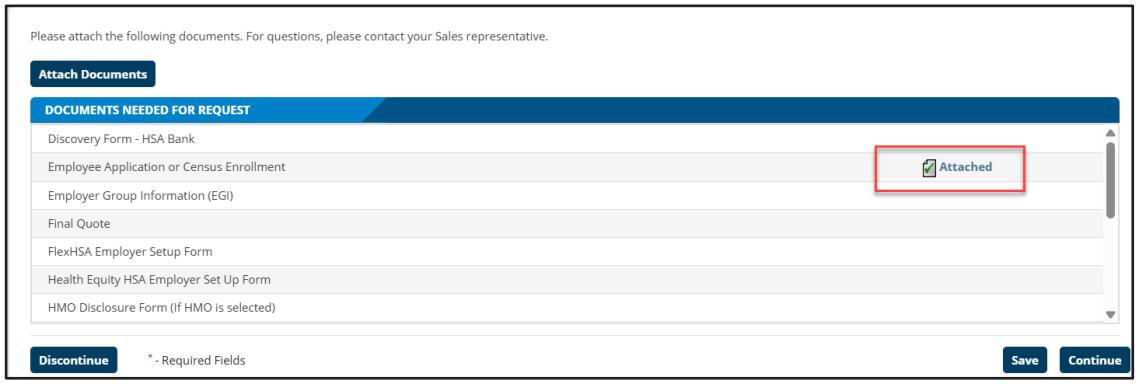
Once all required information is entered, click Continue. 

Submit Request

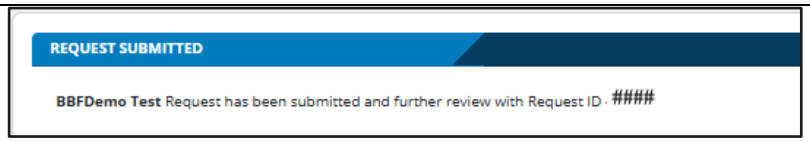
A message populates in the Submit Request window stating Your request has been initiated but has not yet been submitted for processing. Please ensure all information is added to the request and submit for further processing. Save this Request ID to easily check the status on the progress of the case. A Request ID number is assigned, and the Documents Needed pane opens for Request type: **Blue Balance Funded Renewal**
Follow the attach document step above to attach any documents and click on save and submit the request.



Attached icon will display when document is uploaded.



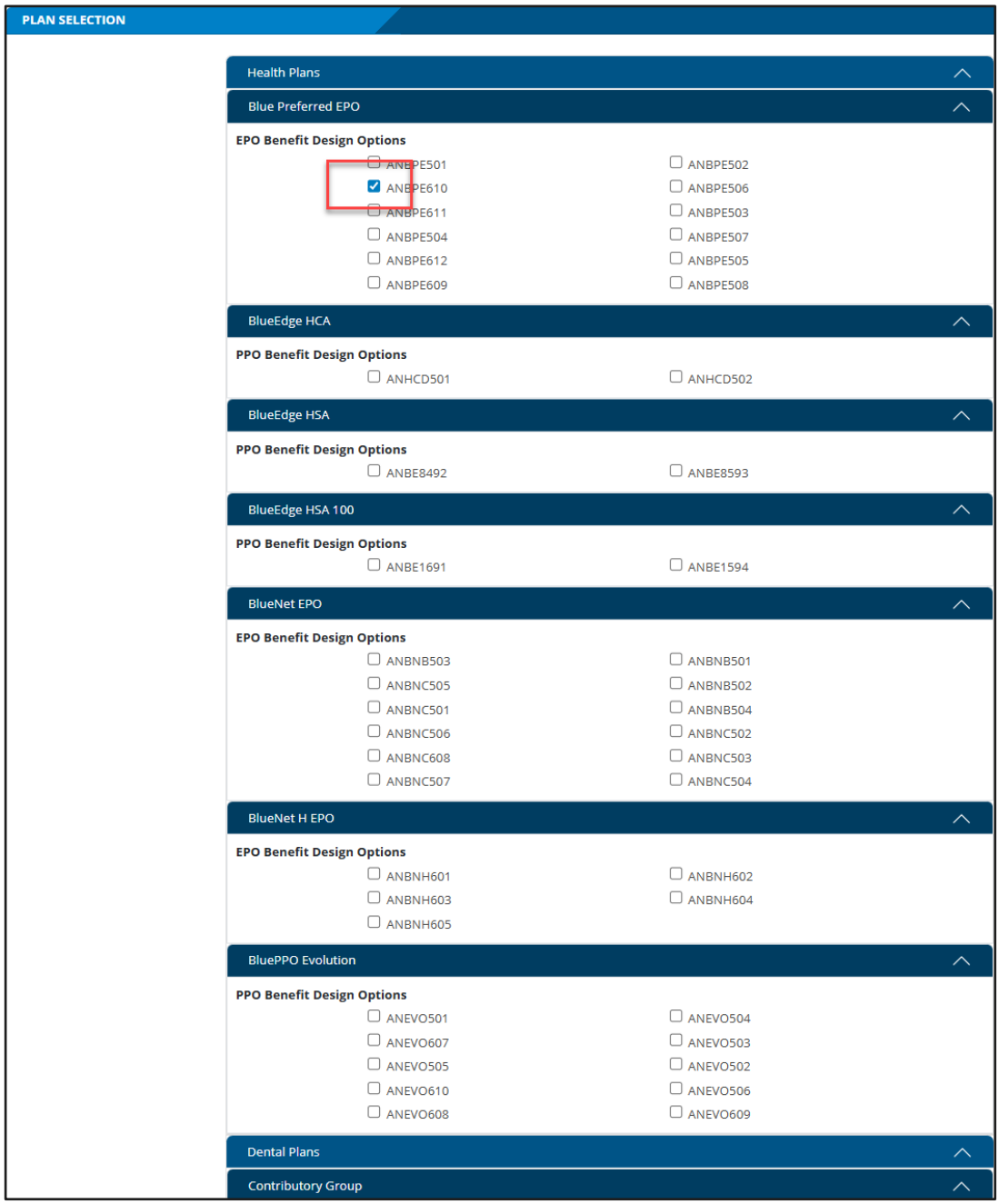
Click on the **Submit** button to submit the request for further review.



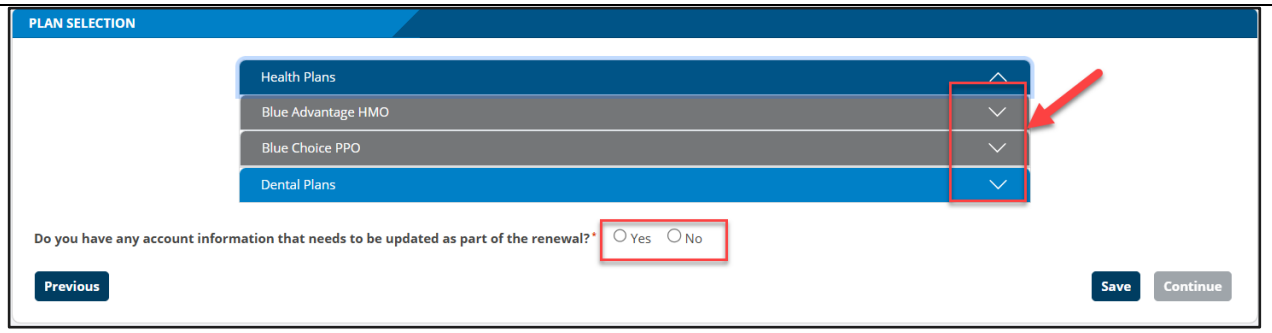
Status will be updated to **Std Mkts Request Pending Internal Review** after successful submission.

Plans page BBF

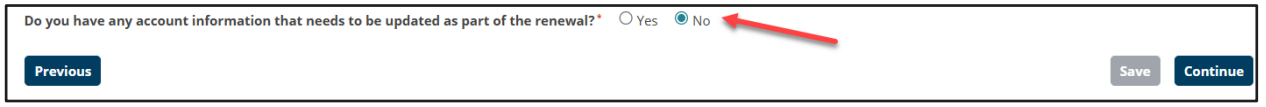
User will have the ability to select existing or new plans with their Blue Balance Funded renewal.
The prior year plans will be pre-selected, however if new plans are wanted or required, the plans listed on the renewal exhibit will be available for selection. User is allowed **up to 3** BBF Health Plans.



User will have to answer the question on the bottom of that page before proceeding.
If Yes is selected, then User will have multiple fields to complete on the next page. If no new account information needs to be updated, then User can review data and complete minimal fields from the paperwork on the next page.

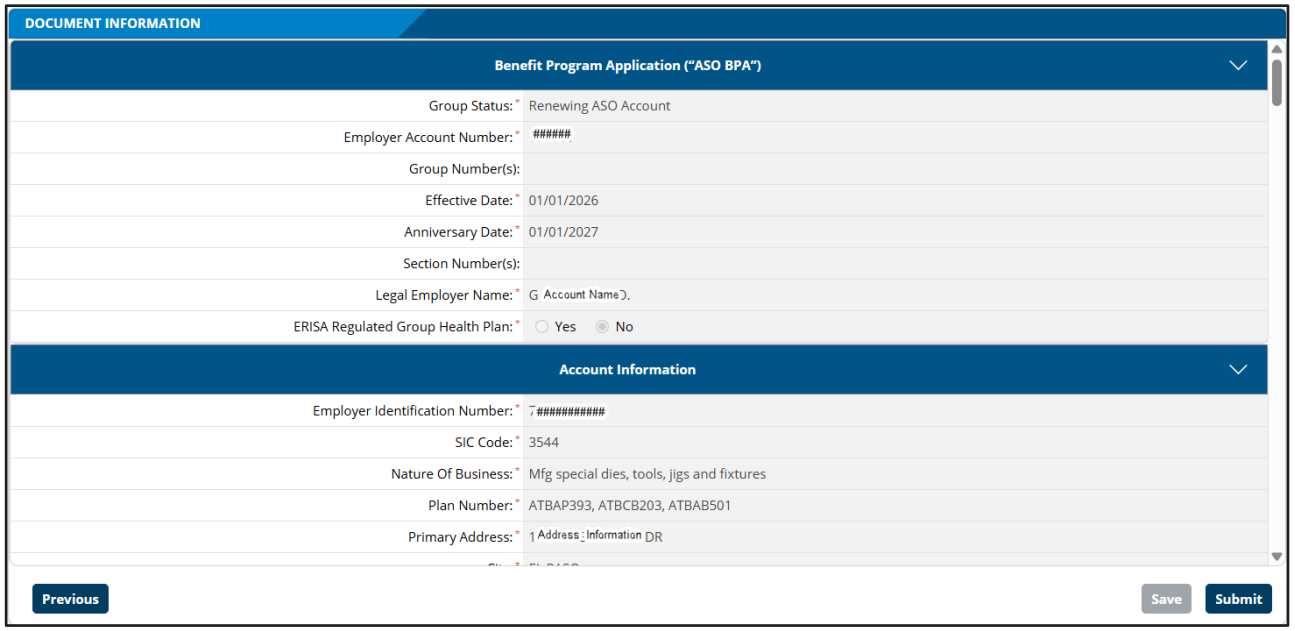


When plans and question is answered, select Save and then the Continue button will populate to proceed.

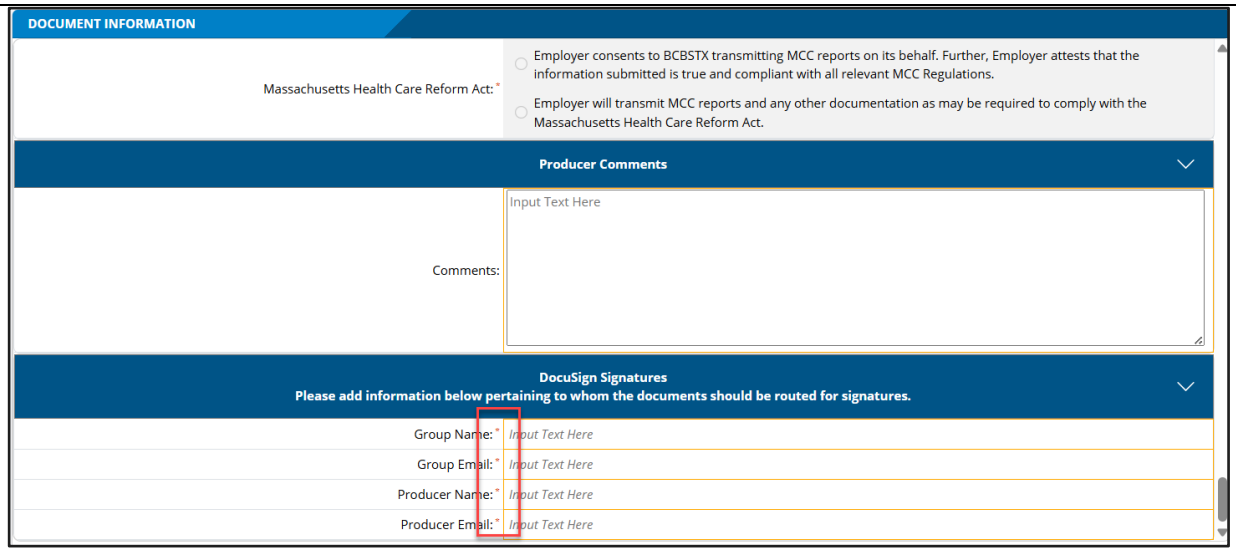


Document Information

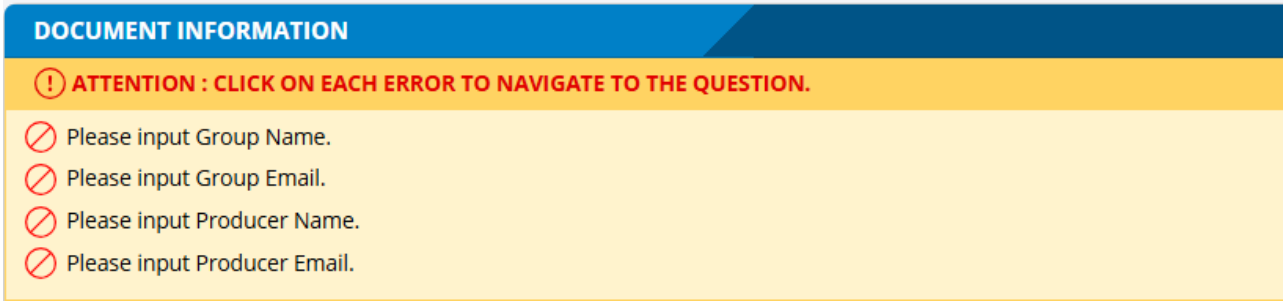
Defaulted information will be displayed, along with required fields depending on action that is selected on previous page.



Any required fields will be highlighted with a yellow box around the field and a red asterisk.



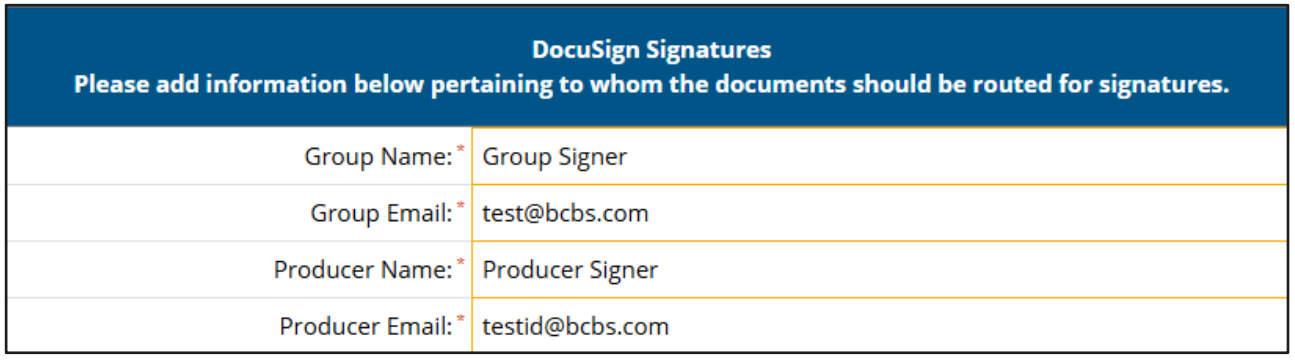
If Submit button is selected and there are missing information that is required, there will be an error message with missing fields displayed on the top of the page.



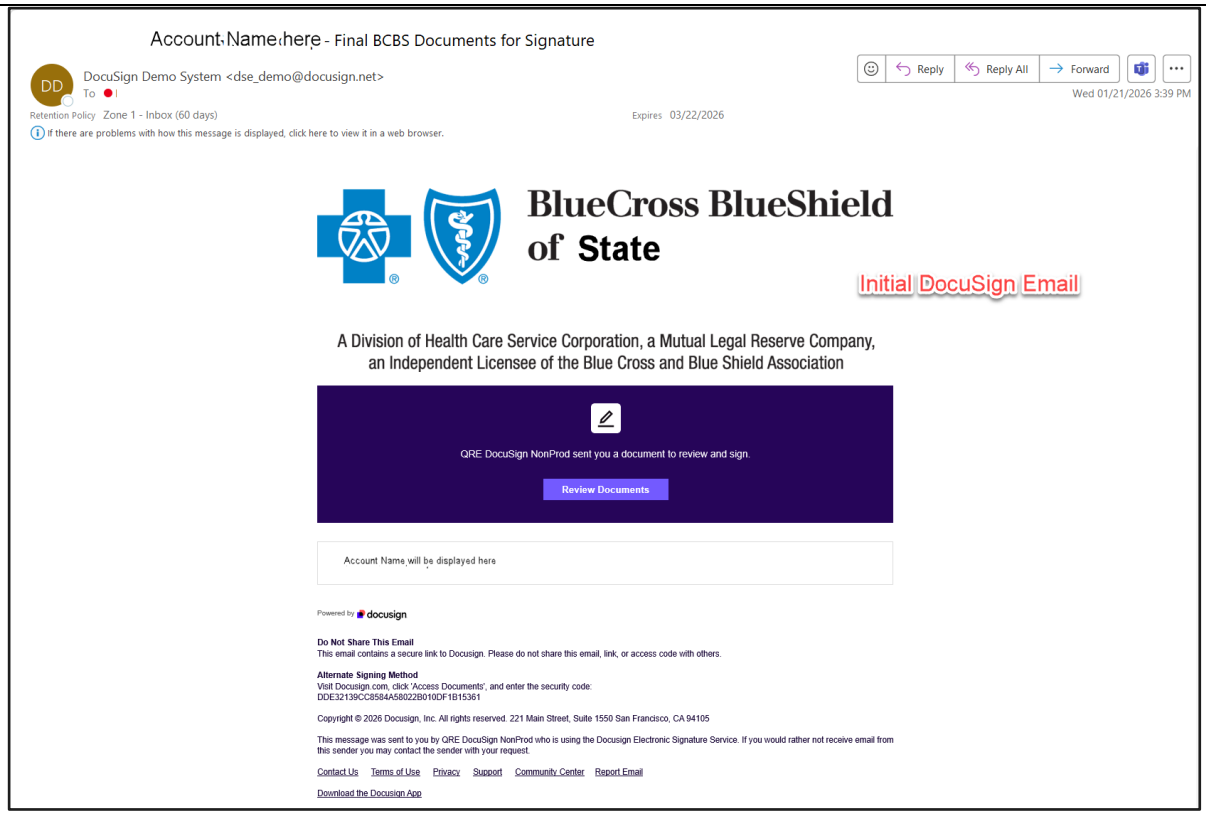
NOTE: User can select the line where information is missing and system will take User to that field.

DocuSign

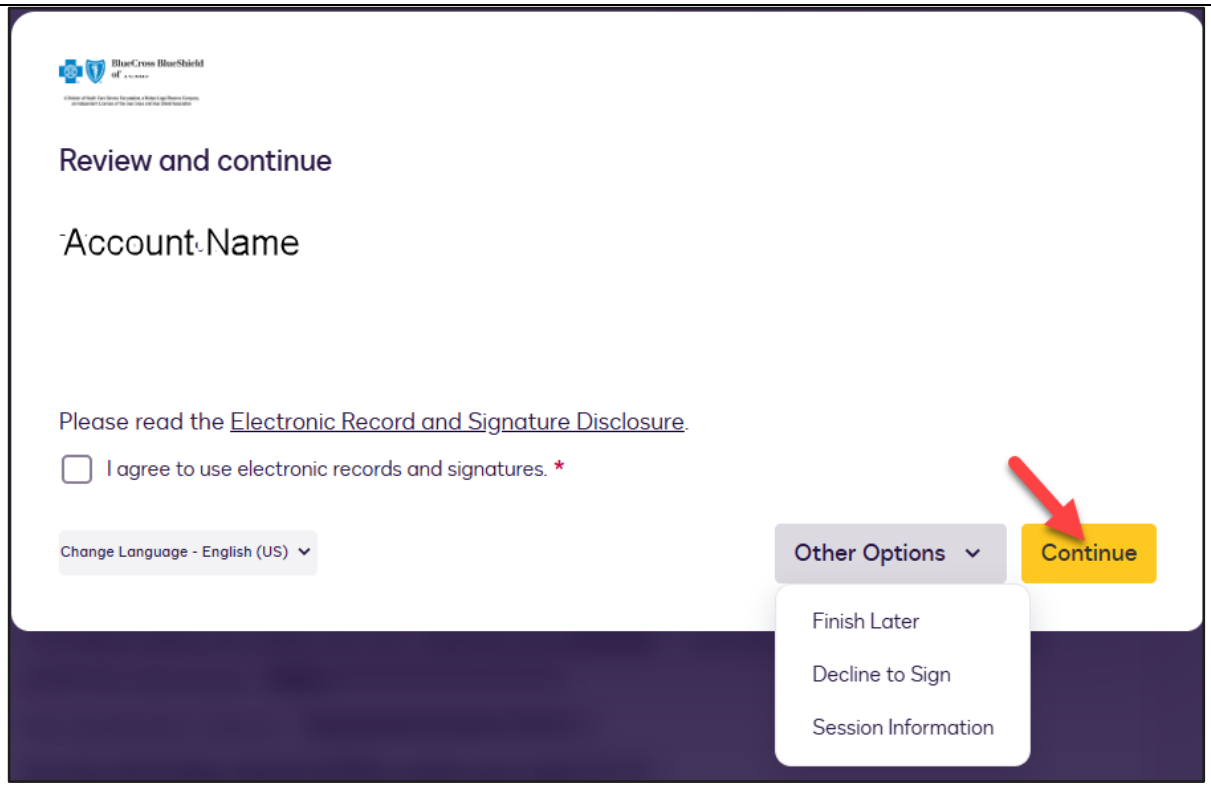
Group Name and Producer Name are the individuals that will be signing the paperwork. Please make sure to enter correct email address so they can receive DocuSign.



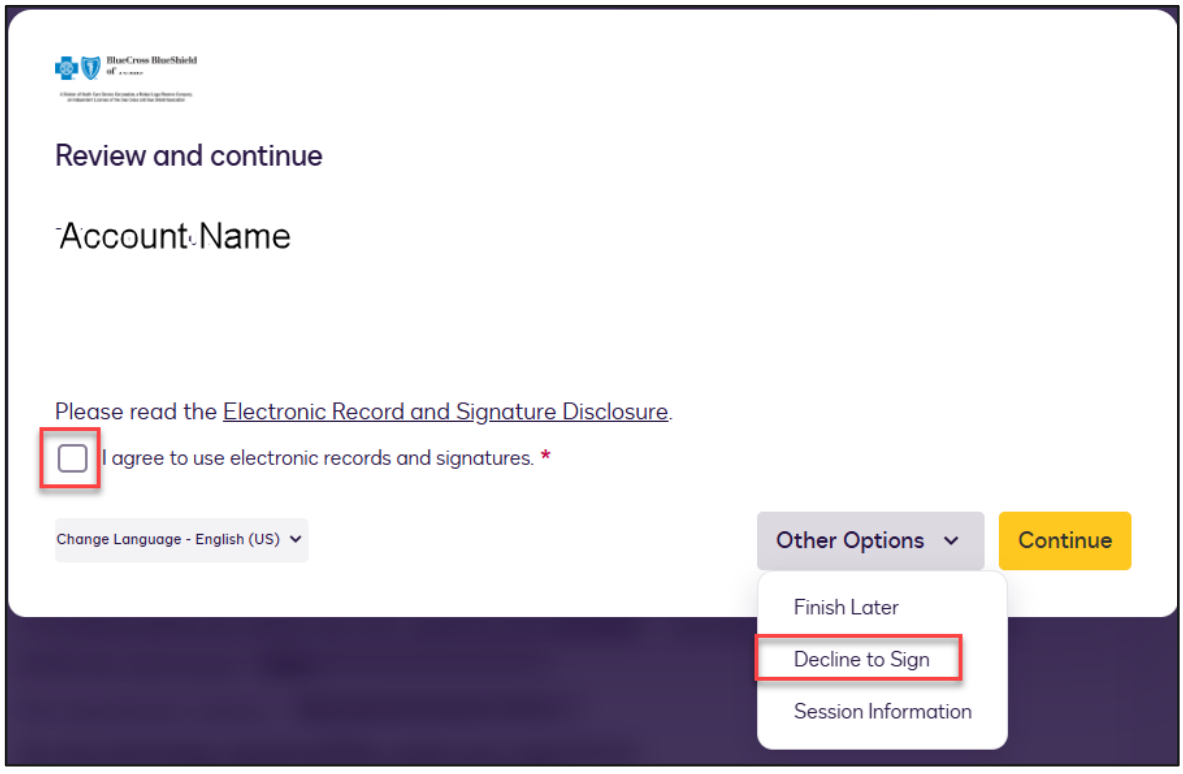
Documentation will first be sent to Producer for Review. Upon accepting and finishing paperwork, it will then be forwarded to the Group for review and signatures. If either party declines to sign the document, it will be routed back internally to review the reason and go through the process again.
Here is the initial view of the email received:



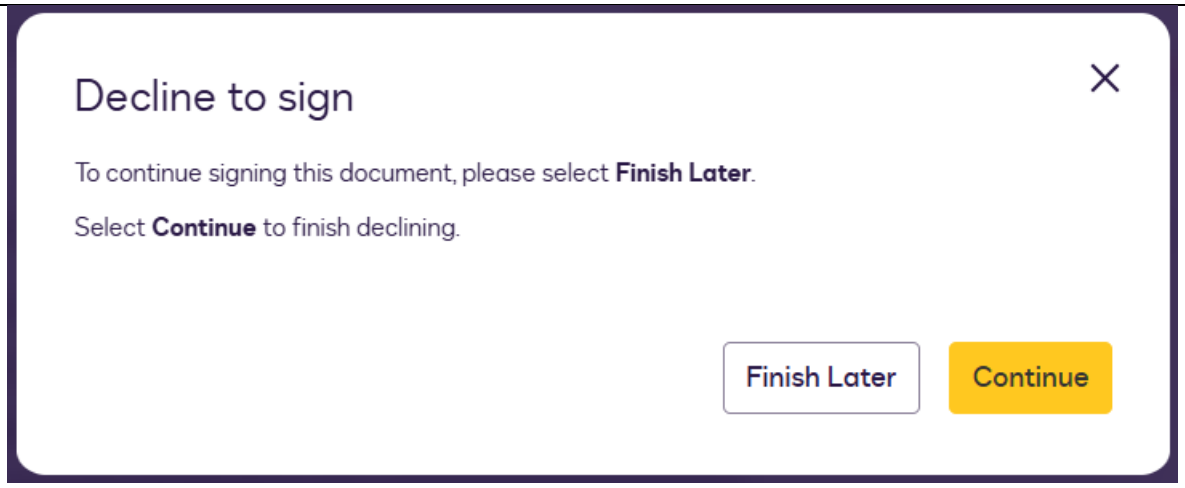
Once the Producer clicks Review Documents, a new tab will open in their internet browser, and they will need to click the agreement box and select Continue to view the documents. If the Producer selects **Other Options** they will see additional choices.



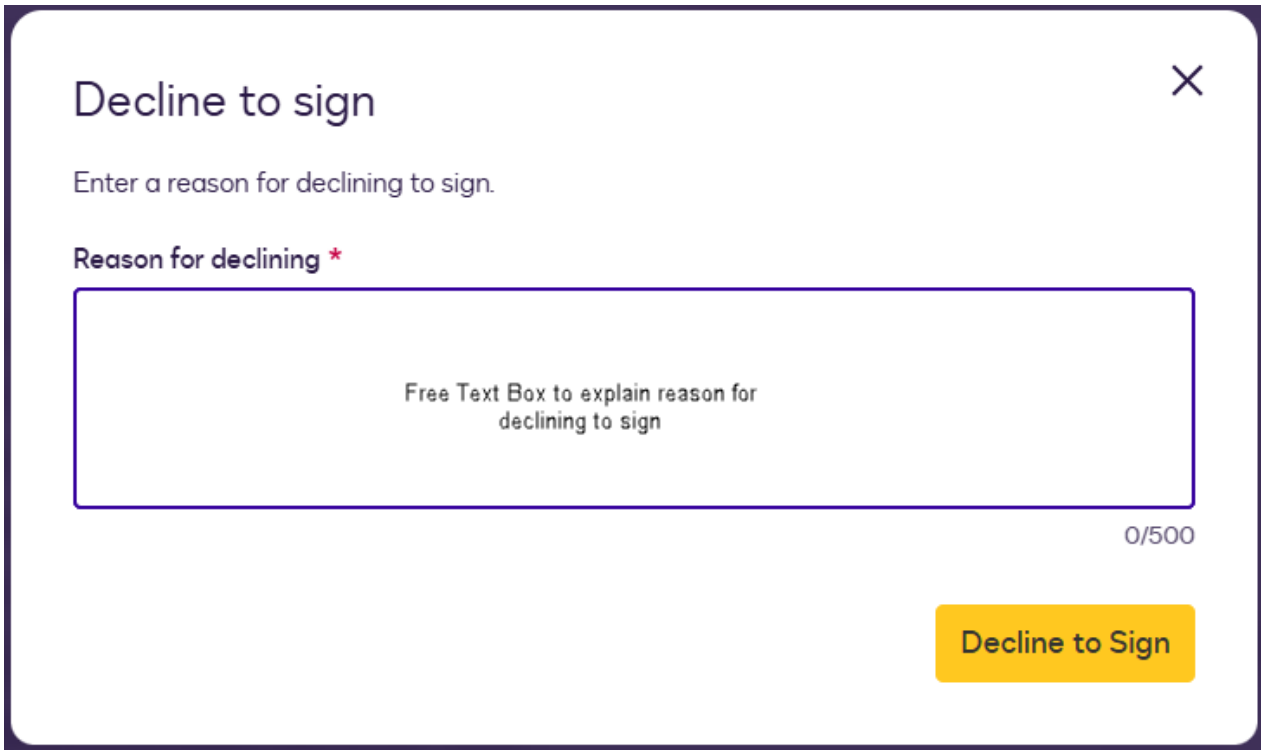
If Producer or Group needs to decline the documents, they can do so using Other Options and selecting from the drop down.



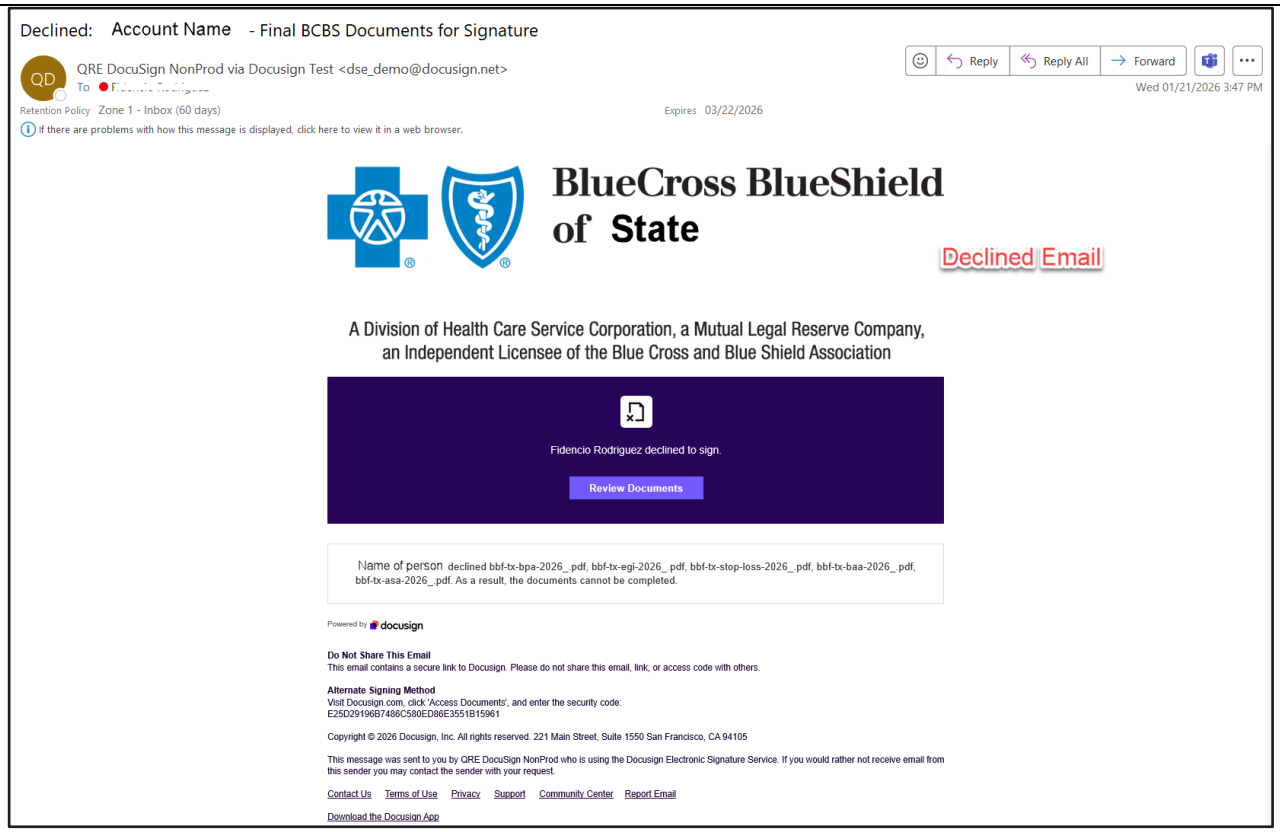
Pop up will display confirming declination.



Reason is needed to Decline.



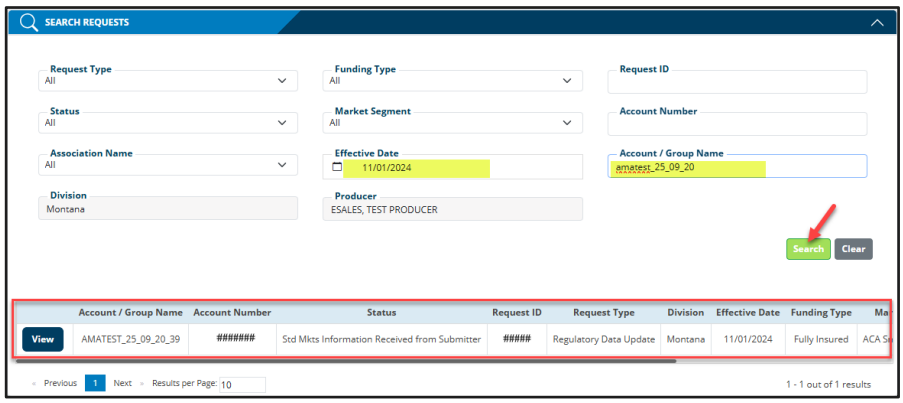
Confirmation email will be sent to parties indicating that group has declined.



If DocuSign documents are signed by Producer and Group, then account will proceed to the next step internally.

Review Request

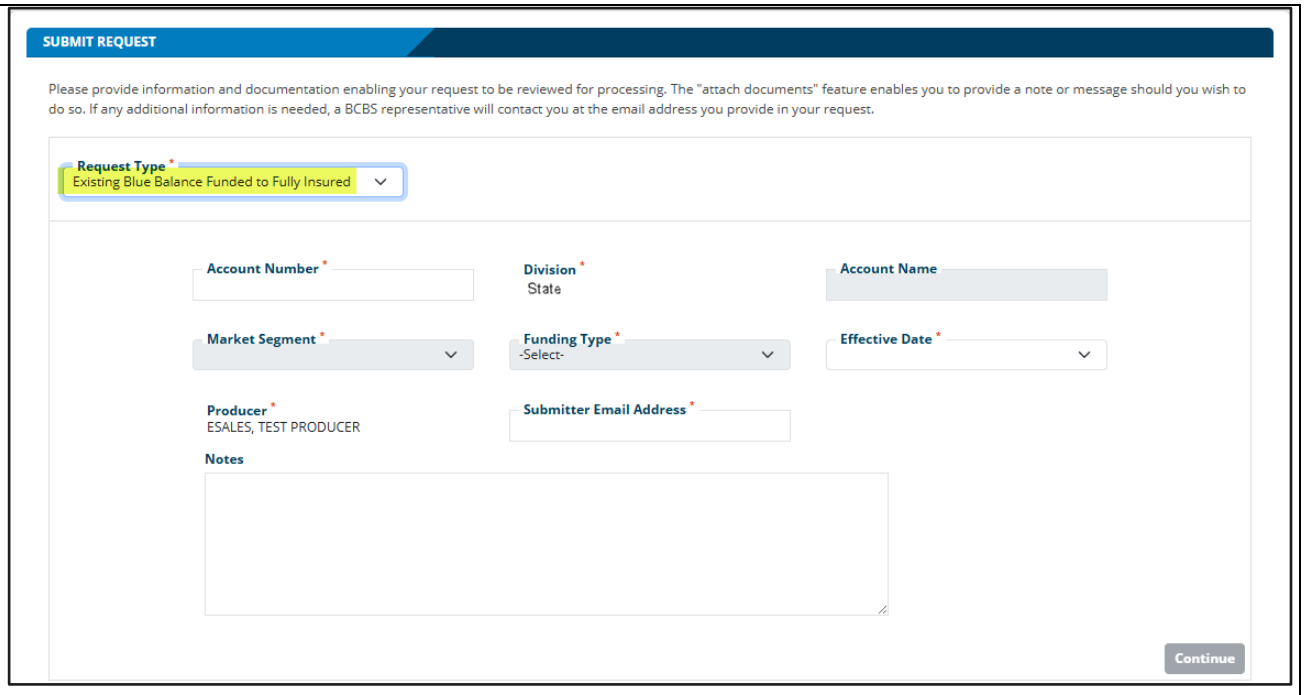
To review your request, search for it on the Request Center Homepage using criteria available and click **Search**.



To view information, you can select the **View** button next to the account.

Existing Blue Balance Funded to Fully Insured

The Submit Request window expands and contains additional required fields when the following request type is selected: Existing Blue Balance Funded to Fully Insured



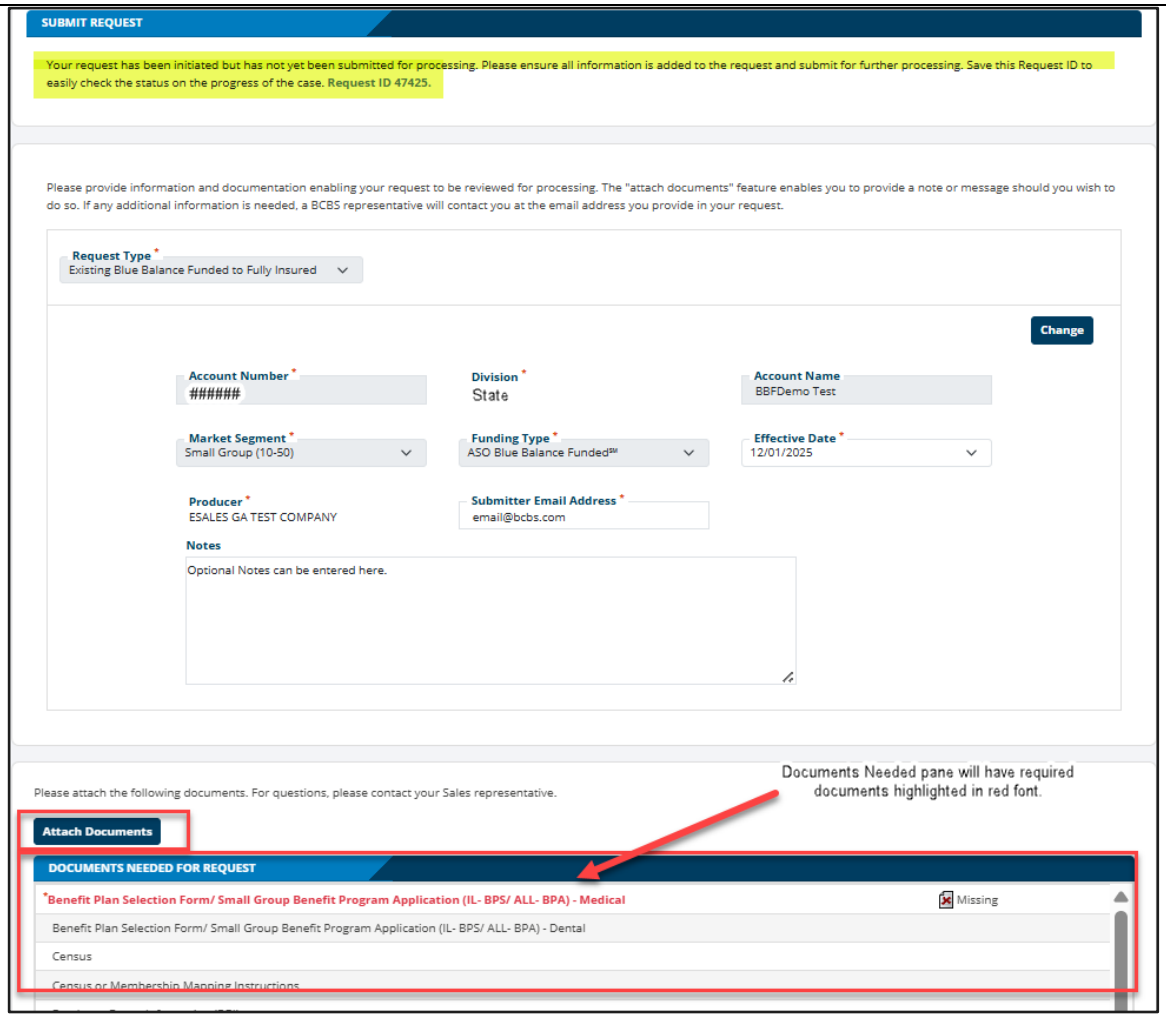
- **Account Number:** Enter the Account Number
- **Division:** Defaults to your state
- **Account Name:** Populates when account number and division are entered
- **Funding Type:** Populates when account number and division are entered
- **Market Segment:** Populates when account number and division are entered
- **Effective Date:** Enter or click on calendar icon to select effective date (mm/dd/yyyy)
- **Submitter Email Address:** Type in the email address of the person submitting the form (Please note: this person will receive all communication on the progress of the submission)
- **Notes:** Type in notes if needed (optional)

Once all required information is entered, click Continue. 

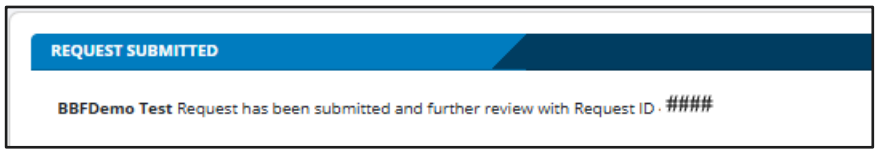
Submit Request

A message populates in the Submit Request window stating that Your request has been initiated but has not yet been submitted for processing. Please ensure all information is added to the request and submit for further processing. Save this Request ID to easily check the status on the progress of the case. A Request ID number is assigned, and the Documents Needed pane opens for Request type: **Existing Blue Balance Funded to Fully Insured**

Follow the attach document step above to attach any documents and click on save and submit the request.



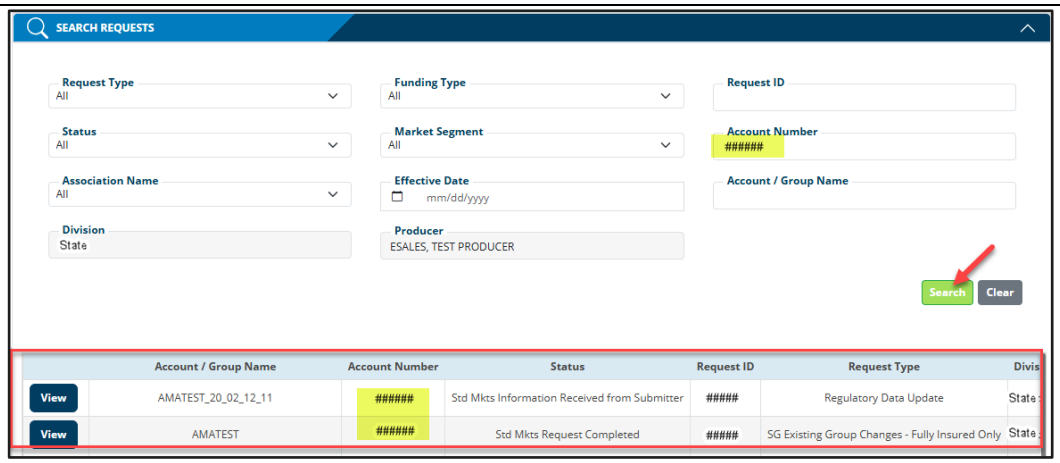
Click on the **Submit** button to submit the request for further review.



The request is now submitted for review.

Review Request

To review your request, search for it on the Request Center Homepage by clicking the Home Page button or Home Icon and using criteria available and click **Search**.

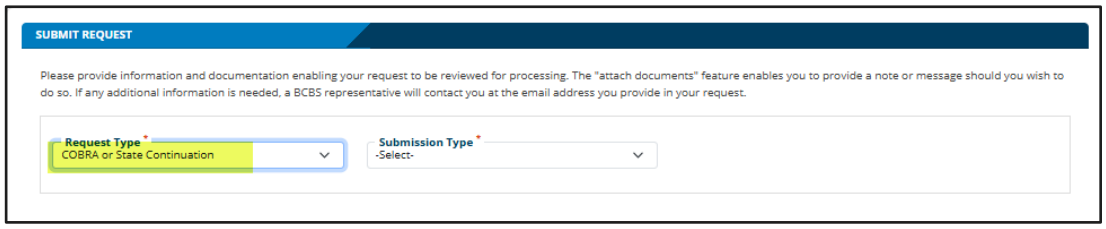


To view information, you can select the **View** button next to the account.

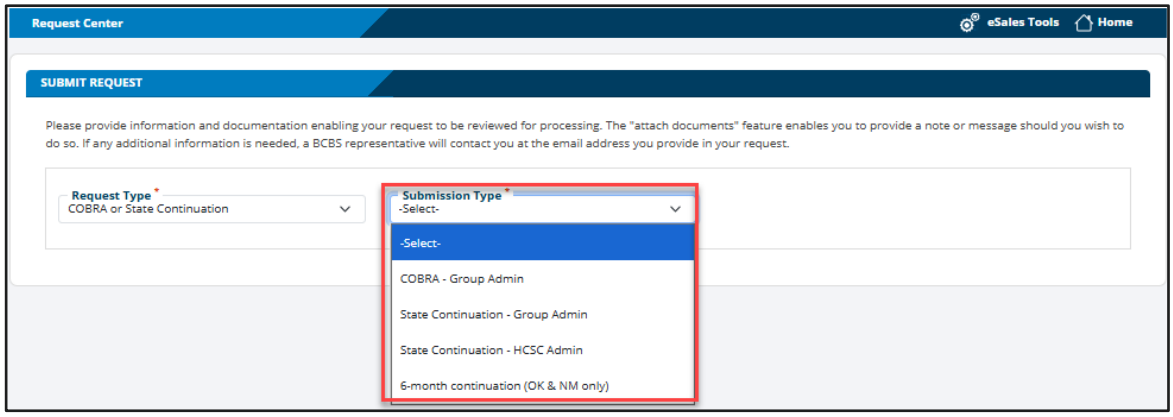
COBRA or State Continuation

The Submit Request window expands and contains additional required fields when the following request type is selected: **COBRA or State Continuation**

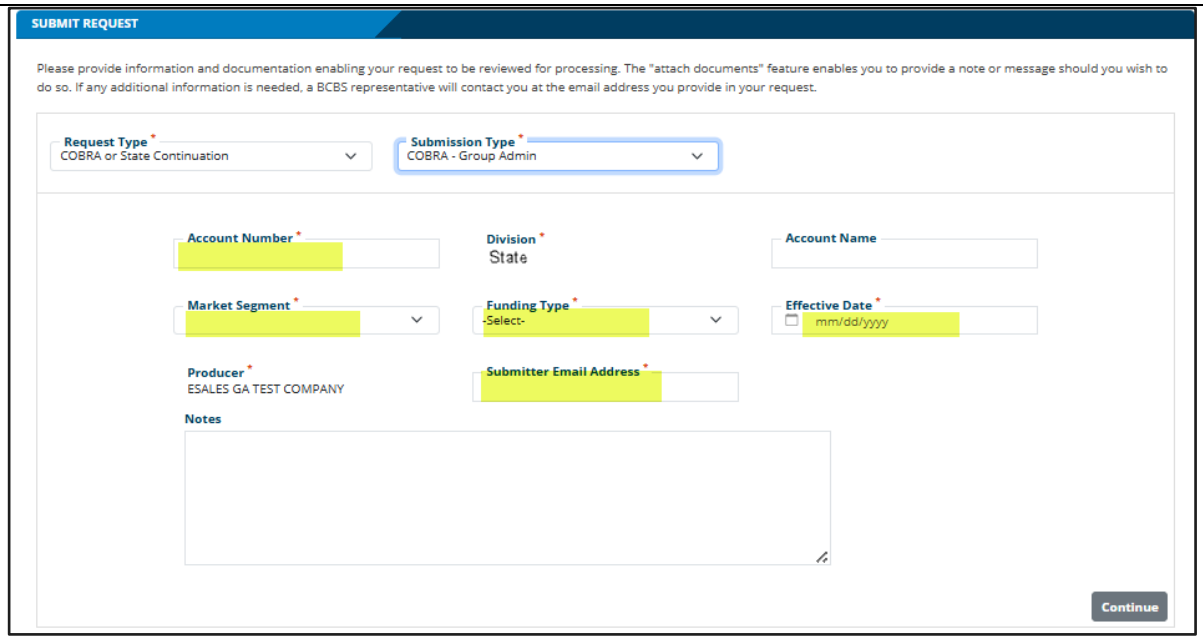
PLEASE NOTE: For Member Level Changes, please use **Membership Message Center**, located in the Blue Access for Employers (BAE) Portal.



Select a Submission Type from the drop-down:



Result: Following selection of Submission Type, the following fields will be displayed:

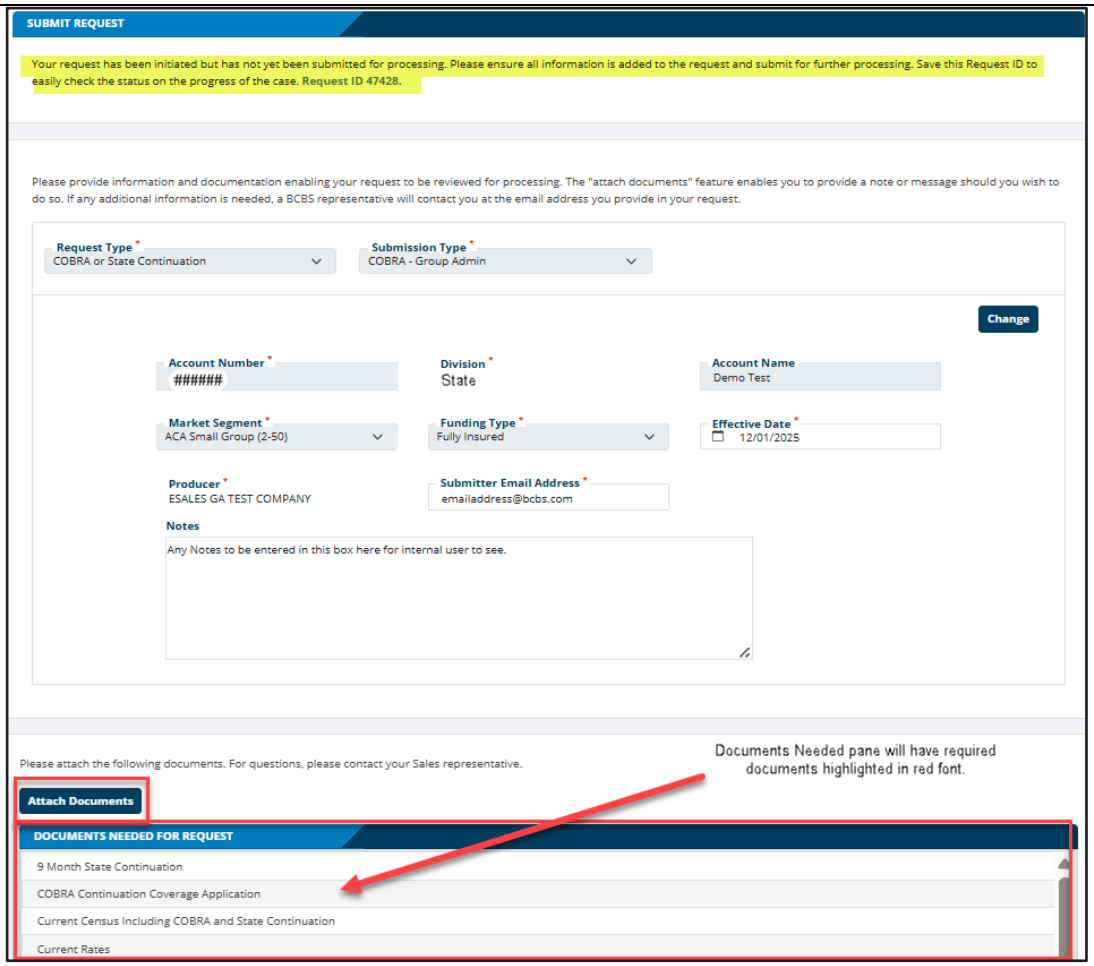


- **Account Number:** Enter the account number
- **Division:** Defaults to your state
- **Account Name:** Populates when account number and division are entered
- **Funding Type:** Populates when account number and division are entered or can be selected from drop-down
- **Market Segment:** Populates when account number and division are entered
- **Effective Date:** Enter or click on calendar icon to select effective date (mm/dd/yyyy)
- **Submitter Email Address:** Type in the email address of the person submitting the form (Please note: this person will receive all communication on the progress of the submission)
- **Notes:** Type in notes if needed (optional)

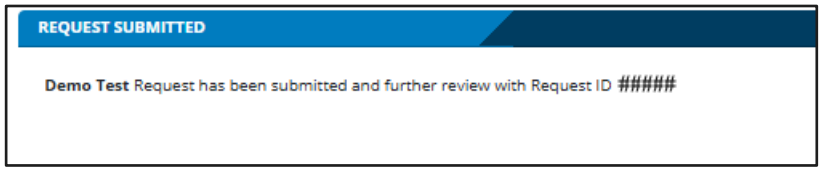
Once all required information is entered, click Continue. 

Submit Request

A message populates in the Submit Request window stating that Your request has been initiated but has not yet been submitted for processing. Please ensure all information is added to the request and submit for further processing. Save this Request ID to easily check the status on the progress of the case. A Request ID number is assigned, and the Documents Needed pane opens for Request type: COBRA or State Continuation
Follow the attach document step above to attach any documents and click on save and submit the request.

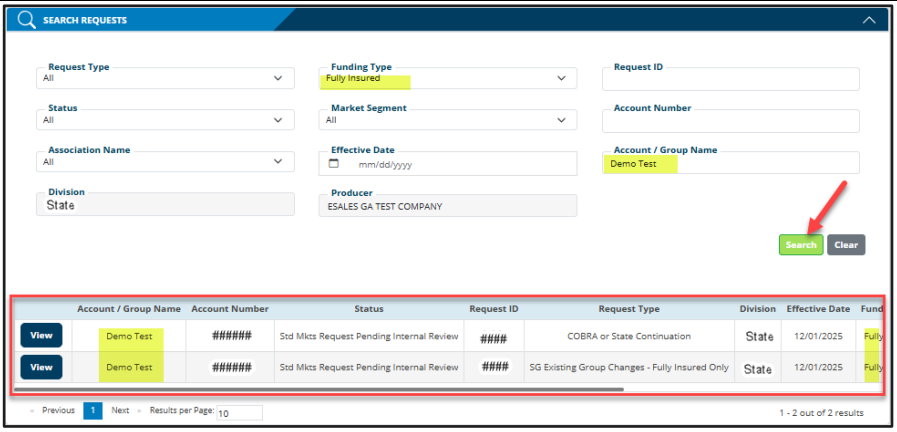


Click on the **Submit** button to submit the request for further review.



Review Request

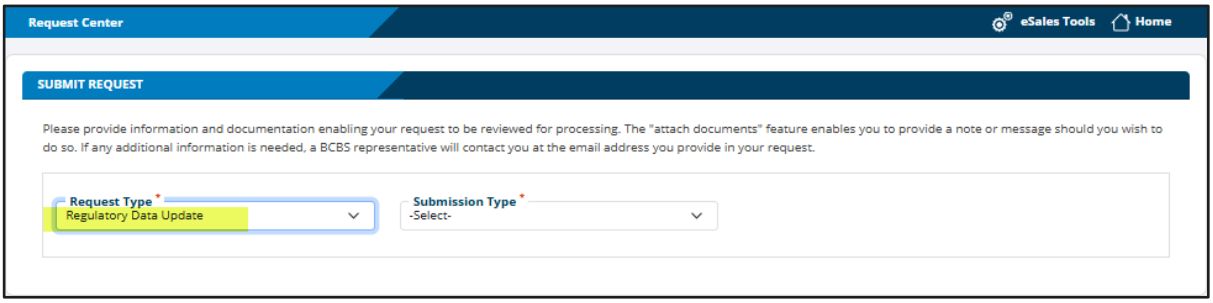
To review your request, search for it on the Request Center Homepage by clicking the Home Page button or Home Icon and using criteria available and click **Search**.



To view information, you can select the **View** button next to the account.

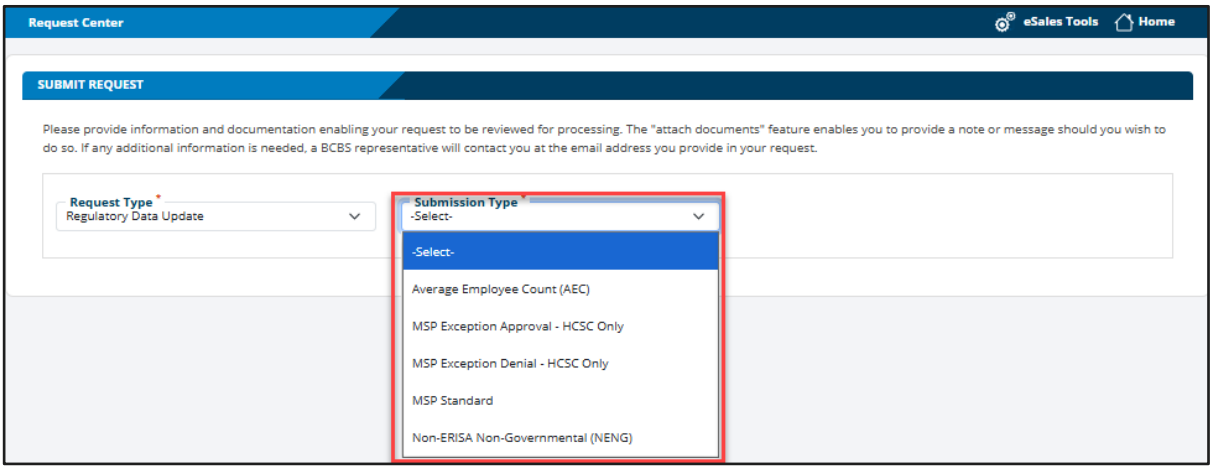
Regulatory Data Update

The Submit Request window expands and contains additional required fields when the following request type is selected: **Regulatory Data Update.**

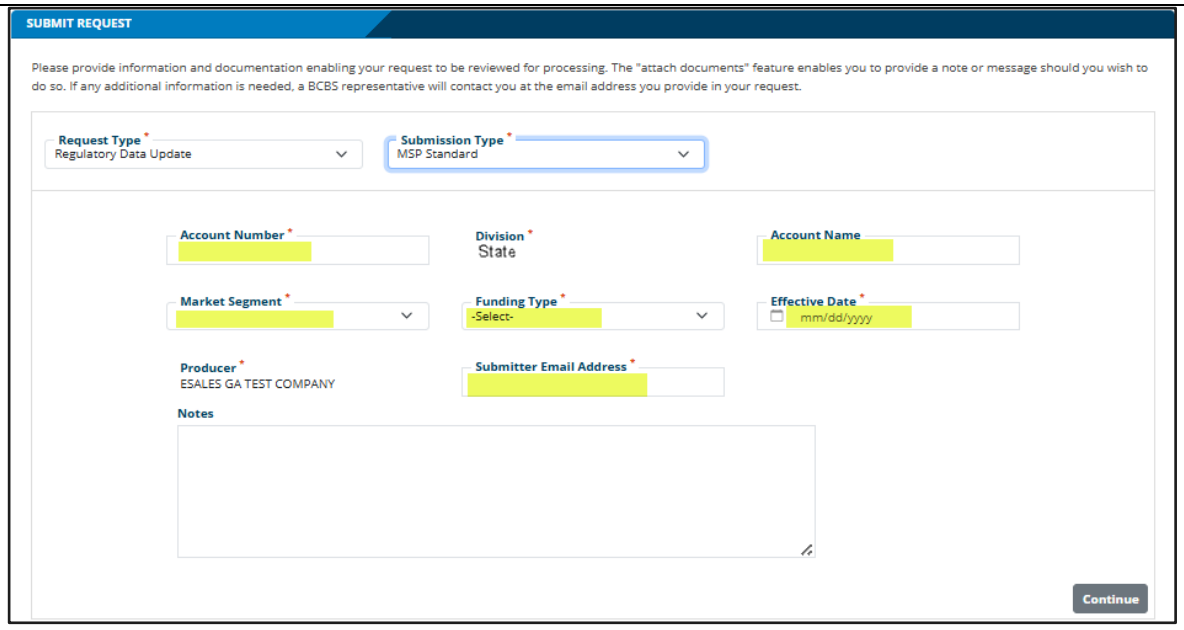


Select a Submission Type from the drop-down.

Note: HCSC Only Submission Types cannot be selected. You will receive an error message if you try to save.



Following selection of Submission Type, the following fields will be displayed:

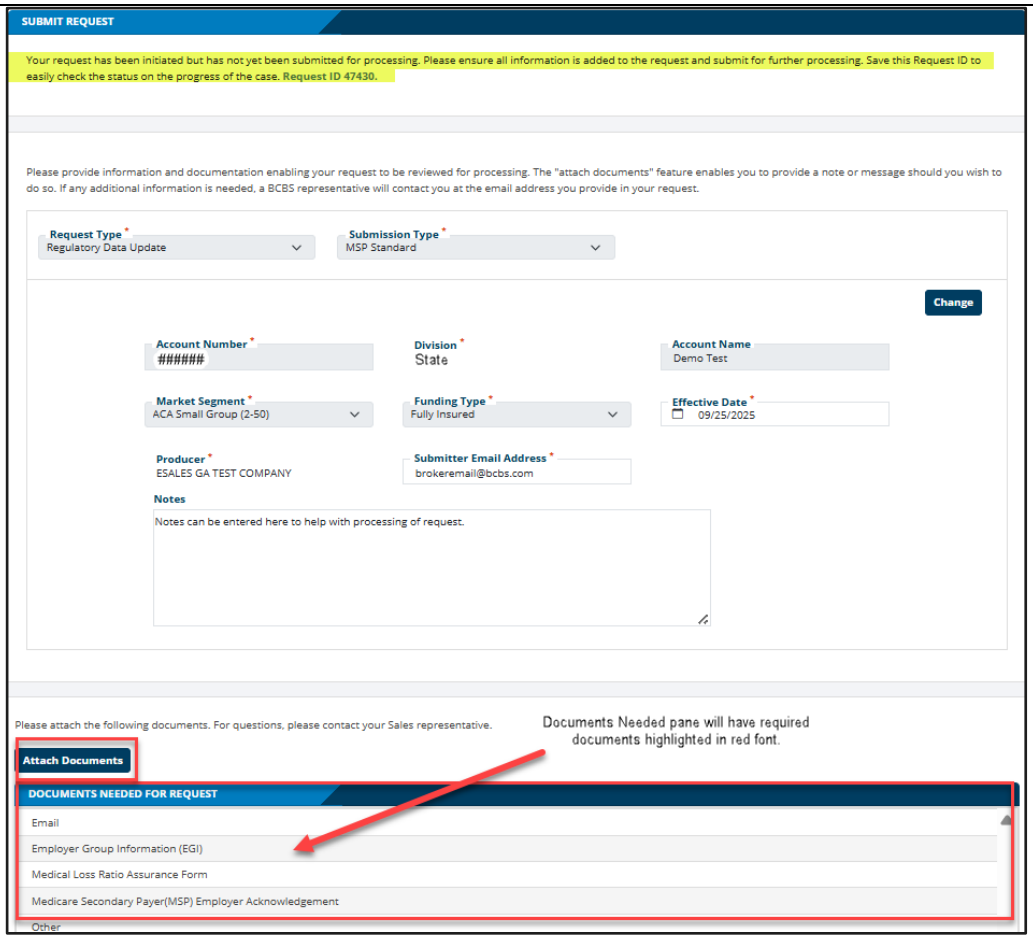


- **Account Number:** Enter the account number
- **Division:** Defaults to your state
- **Account Name:** Populates when account number and division are entered
- **Funding Type:** Populates when account number and division are entered
- **Effective Date:** Enter or click on calendar icon to select effective date (mm/dd/yyyy)
- **Submitter Email Address:** Type in the email address of the person submitting the form (Please note: this person will receive all communication on the progress of the submission)
- **Notes:** Type in notes if needed (optional)

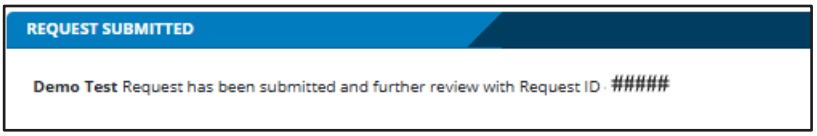
Once all required information is entered, click Continue. 

Submit Request

A message populates in the Submit Request window stating Your request has been initiated but has not yet been submitted for processing. Please ensure all information is added to the request and submit for further processing. Save this Request ID to easily check the status on the progress of the case. A Request ID number is assigned, and the Documents Needed pane opens for Request type: **Regulatory Data Update**
Follow the attach document step above to attach any documents and submit the request.

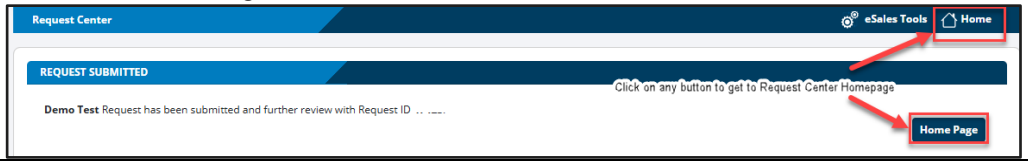


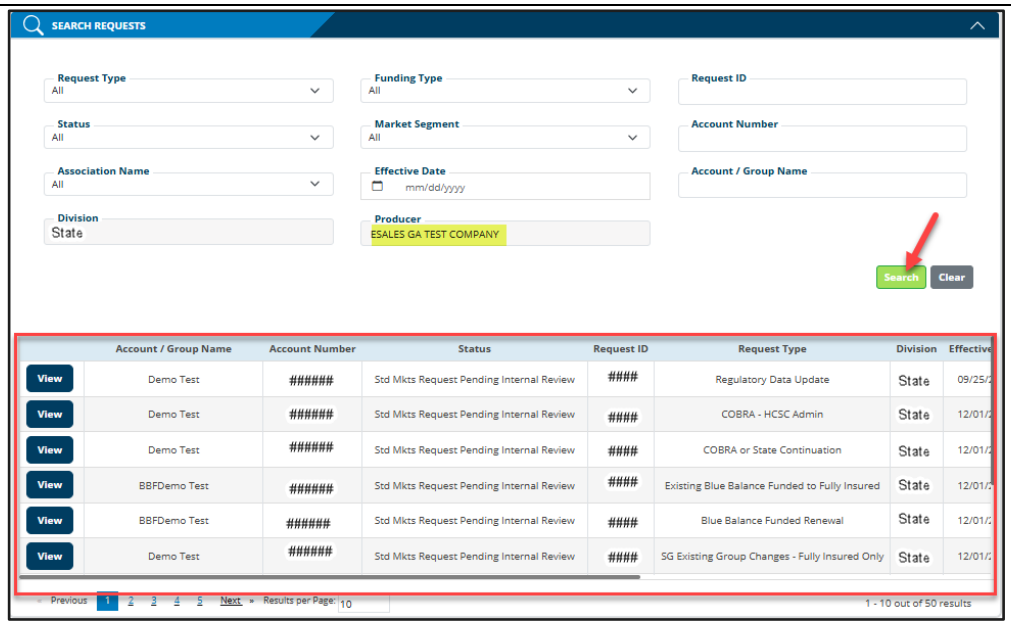
Click on the **Submit** button to submit the request for further review.



Review Request

To review your request, search for it on the Request Center Homepage by clicking the Home Page button or Home Icon and using criteria available and click **Search**.

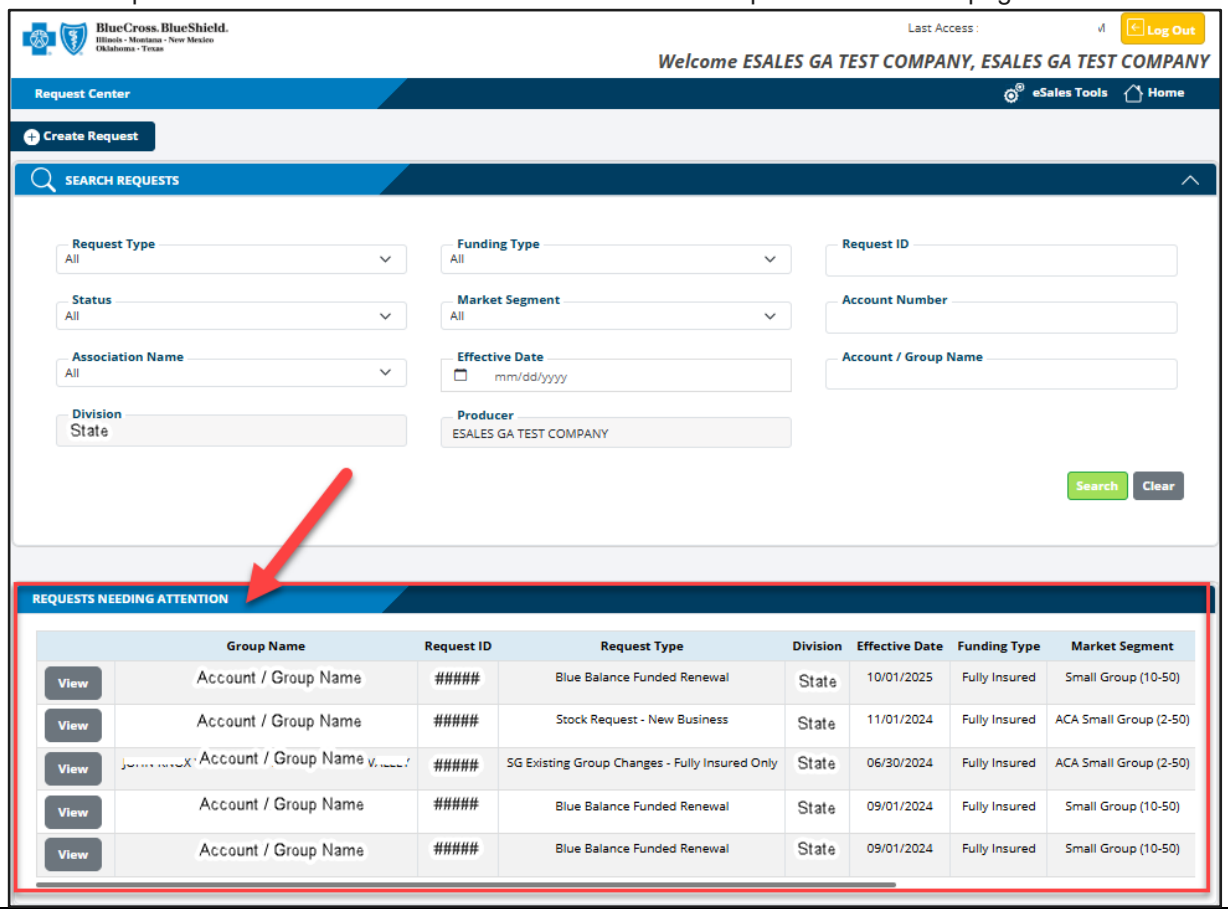


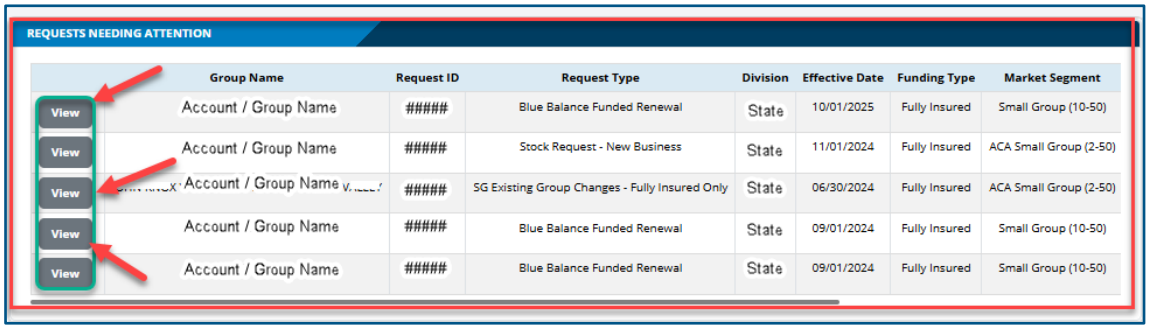
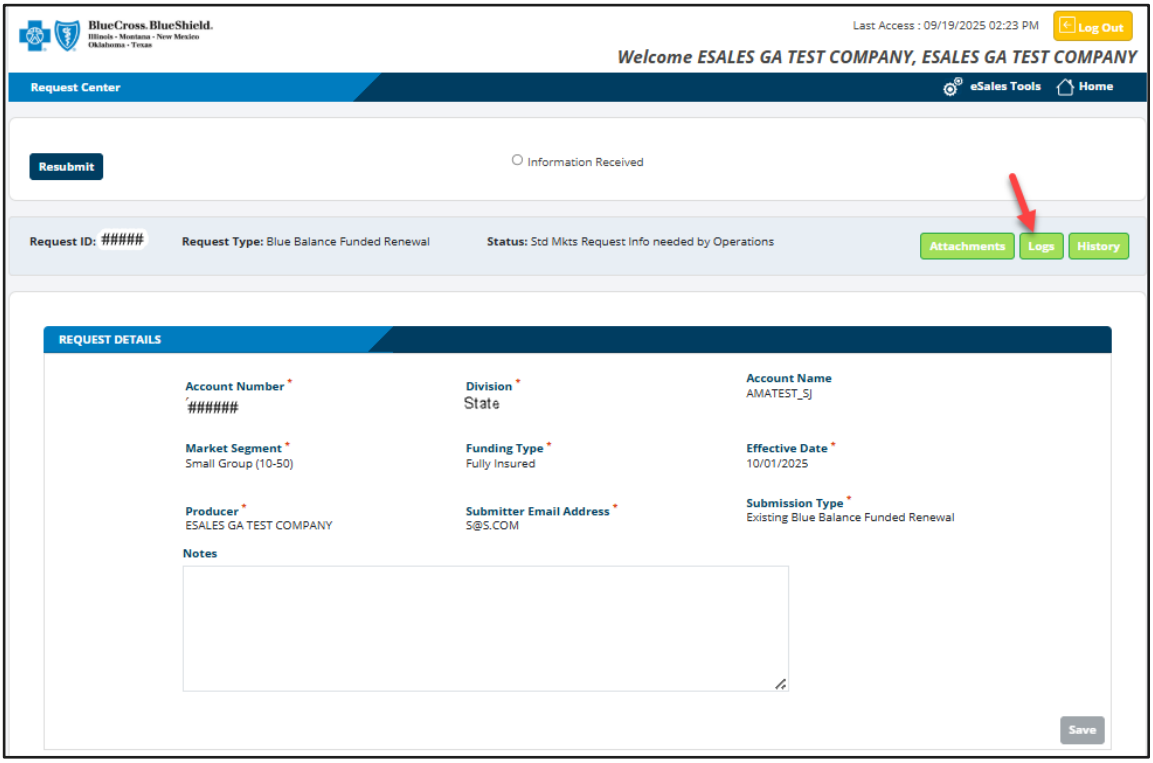


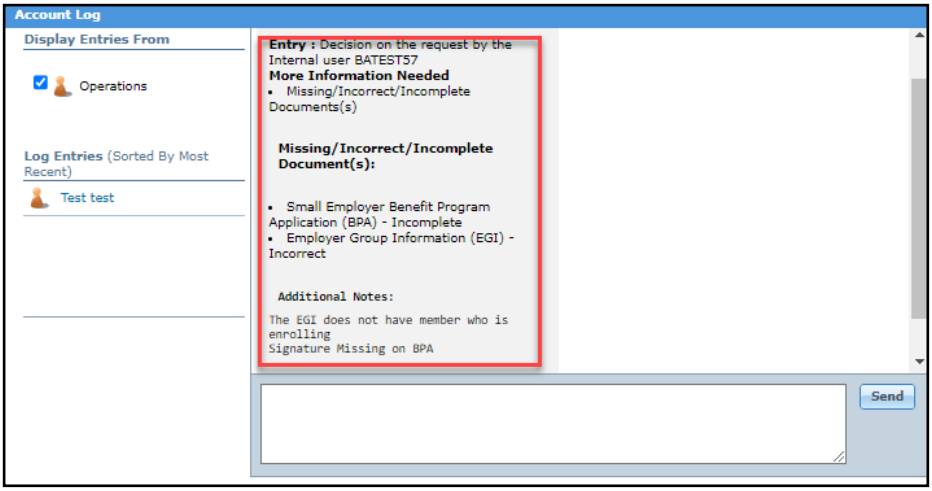
To view information, you can select the **View** button next to the account.

Request Needing Attention

If there are any requests that may need users to complete additional steps (for example, due to Missing/ Incorrect/Incomplete documents), an email to the person in the Submitter email address field will be sent. Those requests can be found on the bottom section of the Request Center homepage.

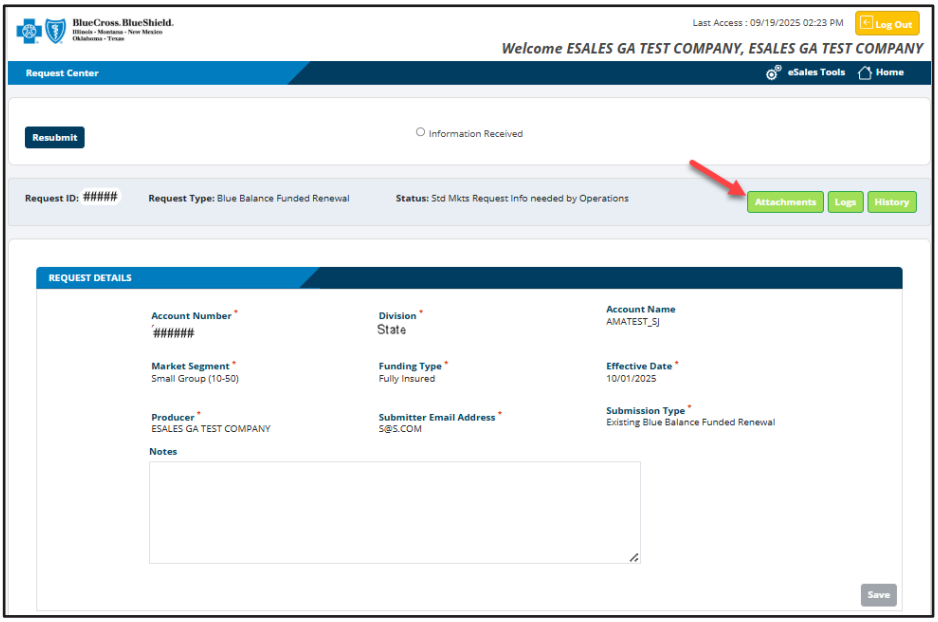


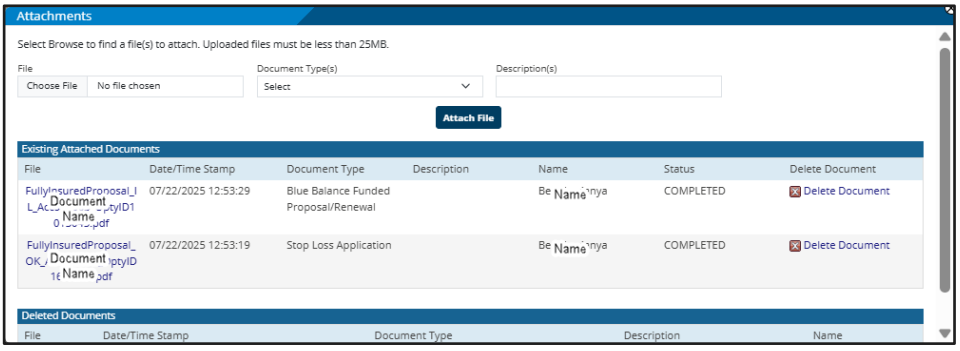
View Button	Click on the View button next to the request needing updates.  User will be able to view notes and comments of processors in the Log.
Log Button	 When Log button is selected, you can view the reason for the request info needed per the log entry.



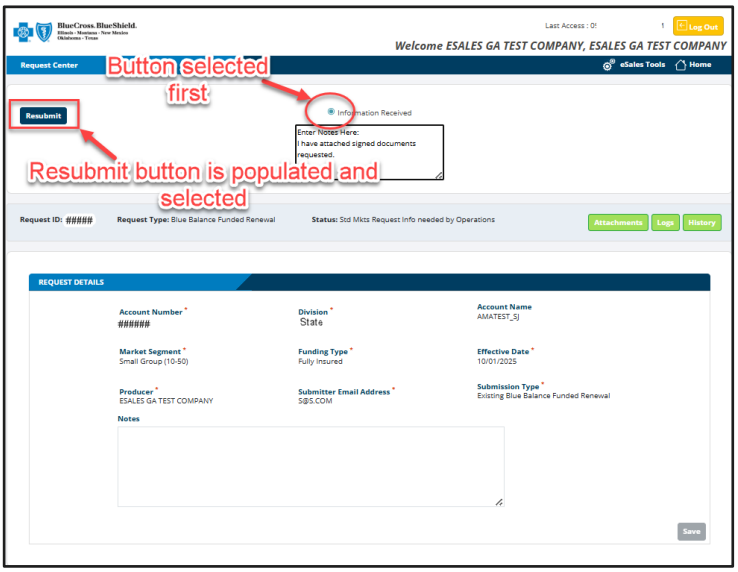
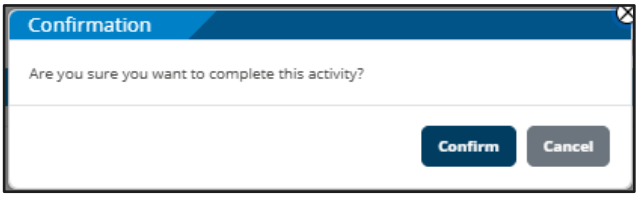
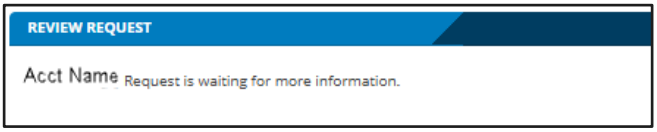
The request will open and allow you to attach correct document(s) via the Attachments button and same instructions as above.

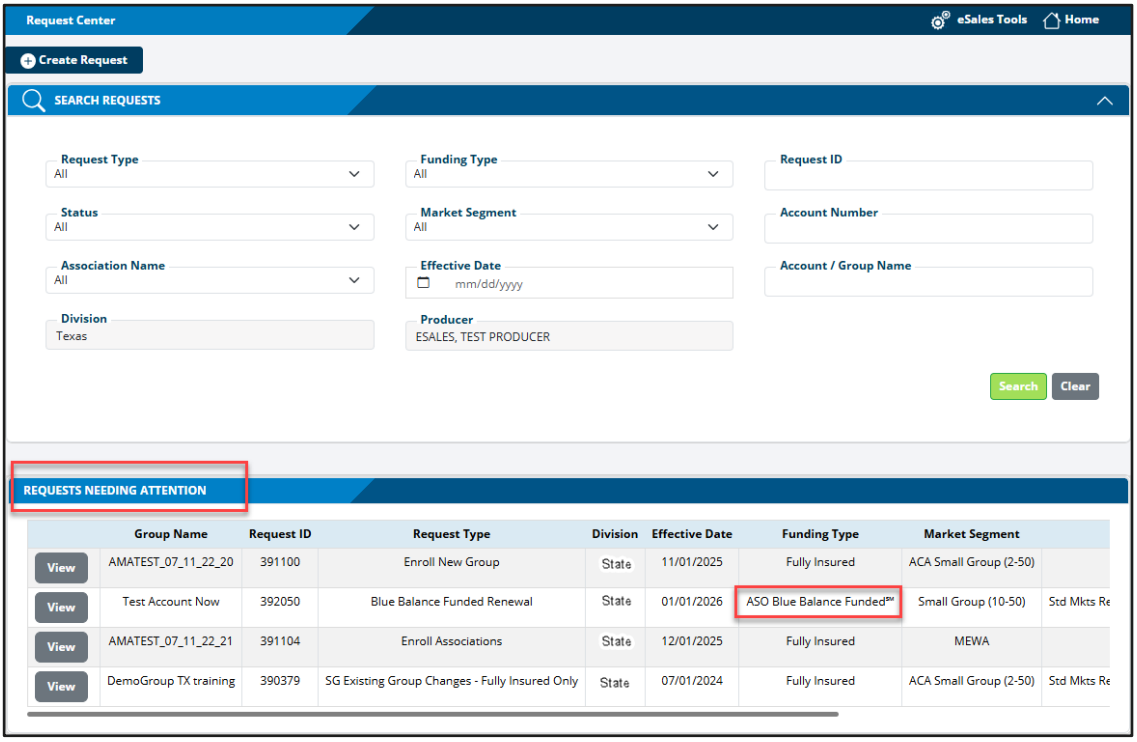
Attachment and Fully Insured Resubmit Buttons



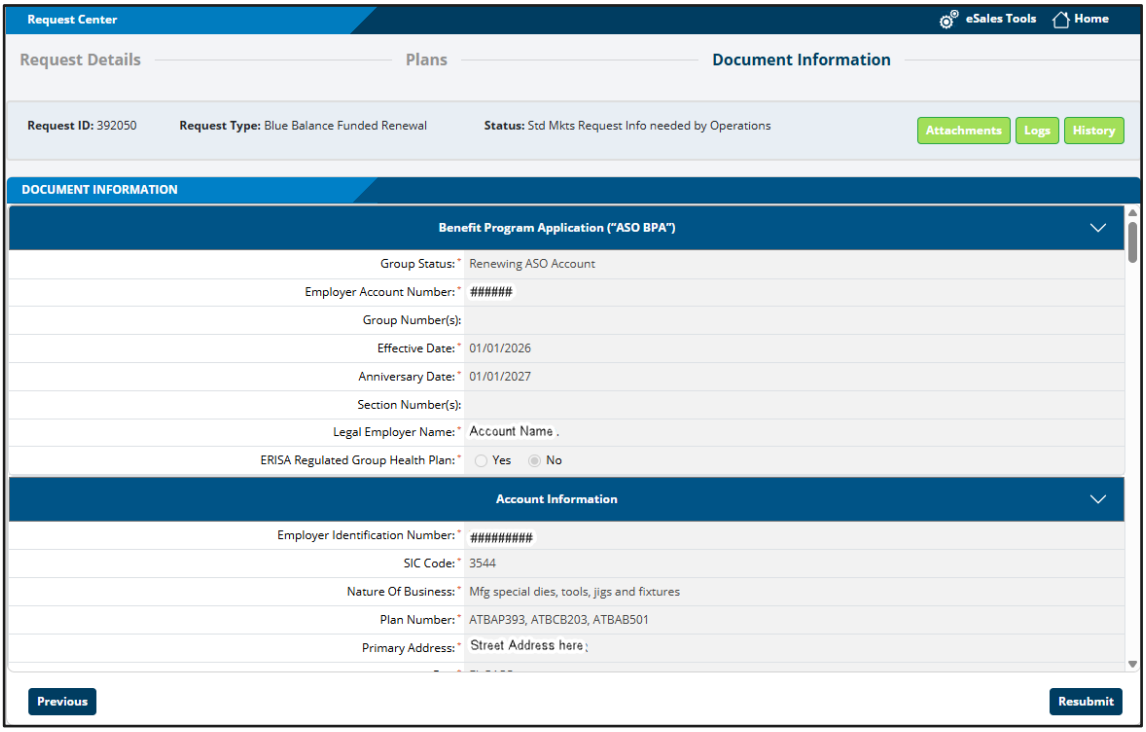


When all data is attached, click the **Information Received** radio button, enter any Notes and click

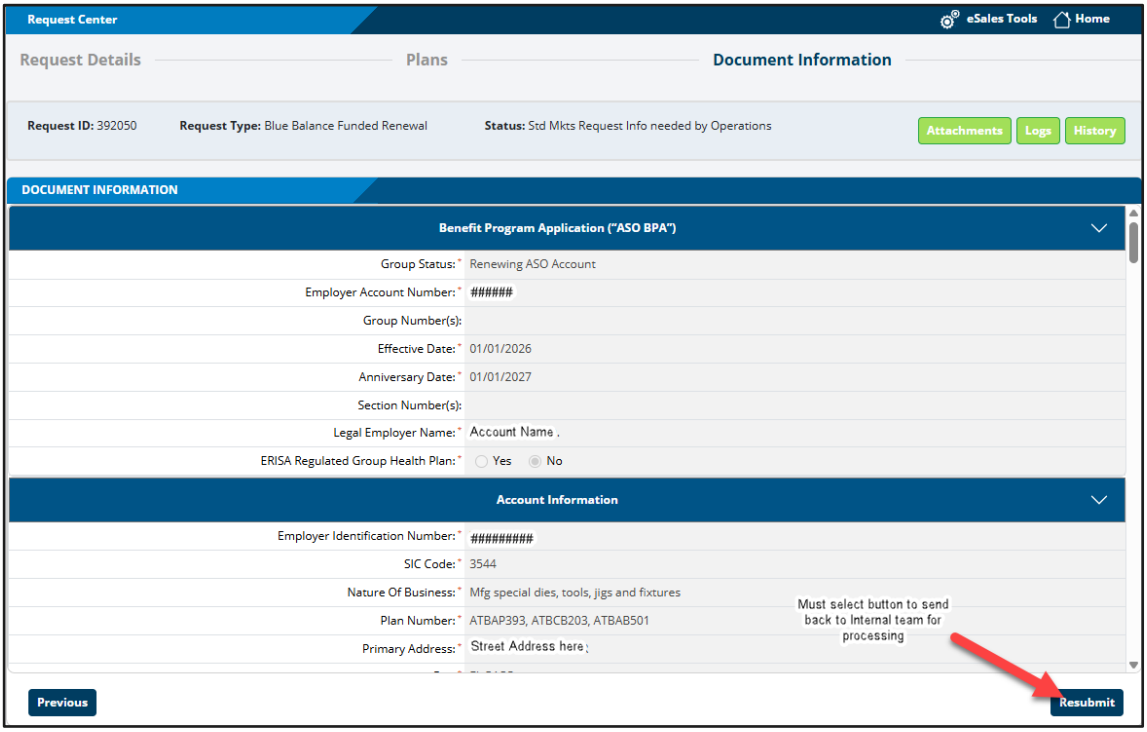
	Resubmit.  Confirmation will be populated. Select **Confirm** to send account back to internal processor.  After clicking **Confirm**, message is received.  The request will go back to the processor with proper documentation attached.
Blue Balance Funded Resubmit	If account is sent to broker/producer for attention, the request will be available in Requests Needing Attention on the Request Center homepage.



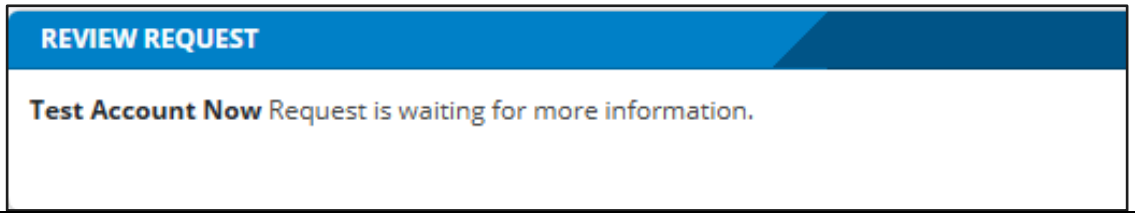
User will select **View** next to account that needs resubmission. Request Details page will populate. User will need to click Continue until the Document Information page is displayed.



User can then attach any requested documents, by using the **Attachments** button and **Resubmit** back to the internal party to continue with processing.



User will receive confirmation message that Request is waiting for more information.

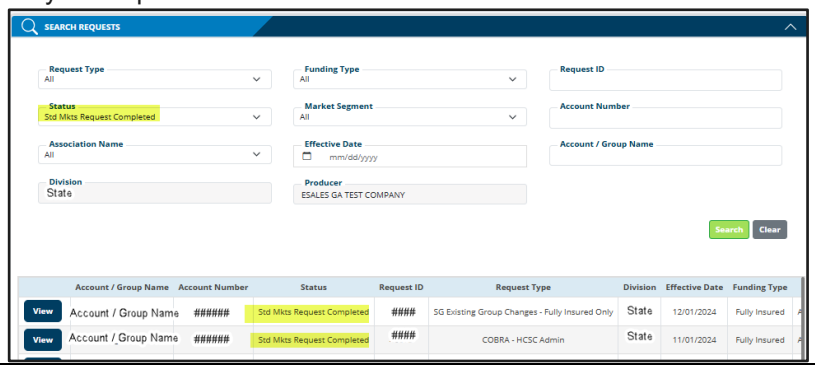


Request Completion

Request Completion

After your Request has been worked, Submitter will receive an email confirmation that the Request is now complete.

You can also verify on the Request Center homepage that Status is updated to Std Mkts Request Completed
for your request.



Status Definitions	• Std Mkts Account Processing in Progress *(Request was submitted successfully and is being processed internally)* • Std Mkts Financial Account Setup (BBF Billing) *(Only for Blue Balance Funded requests, where the request is with our internal financial team before sending to UW)* • Std Mkts Information Received from Submitter *(Missing information has been resubmitted and received by internal team and will continue to be reviewed and processed)* • Std Mkts More Information Required *(Request has been sent back in the external submitter queue for more information. This requires user to resubmit to BCBS to continue processing.* • Std Mkts Request Approved by UW *(UW has approved the account and will be sent to internal user to review approved changes)* • Std Mkts Request Info needed by Operations *(Request has been reviewed by internal Operations user and requires more information from the producer)* • Std Mkts Request Pending Internal Review *(Request has been submitted successfully and is awaiting internal review)* • Std Mkts Request Pending UW Review *(Internal Operations review has been completed and has been sent to UW for their review)* • Std Mkts Request Pending UW Re-Review *(Initial request was sent back for more information, but is now back to the UW for their re-review)*
Emails to be received	• Std Mkts Request Pending Internal Review *(Email that is sent with submission of request)* • Std Mkts Request info needed by Operations *(Email indicating that more information is required, producer must log into Request Center to view details using the Log and Resubmit using selecting the Information Received radio button and Resubmit button)* • Std Mkts Request Completed *(Email notifying the producer that request is complete with no further action needed)* • Std Mkts Request Discontinued *(Email notifying the producer that request has been discontinued with Reason Code description, and any additional notes are provided in the Log)* • DocuSign – Final BCBS Documents for Signature *(Only for BBF accounts that are renewing or switching from FI to BBF)* • DocuSign – Declined *(Only for BBF accounts that declined paperwork)*