



# Individual Sales Checklist for New Producers

Here's your to-do list before helping a client find an ACA qualified health plan.

## Register to use Blue Access for Producers<sup>SM</sup>

[Blue Access for Producers](#) (BAP<sup>SM</sup>) gives you access to a suite of tools to help you manage your business. When you onboard with us, you get a 9-digit Producer ID. That's all you need to open an account on BAP.

### Action Items

1. Once you onboard with us, get your 9-digit producer ID and go to [Blue Access for Producers](#).
2. Download the [Quick Start Guide](#). Follow the instructions and register to use BAP today.

## Certify with the state of New Mexico

Before you can help consumers find a health plan, you must become a marketplace certified producer.

### Action Items

1. Check out New Mexico's guide for [new producers](#) or [returning producers](#).
2. Learn more on how to become a [marketplace certified producer in New Mexico](#).
3. Complete all required training and registration steps BEFORE assisting clients.

## Register to use the Retail Producer Portal for quoting and enrolling

The [Retail Producer Portal](#) is a comprehensive sales and service tool for the individual ACA market. The portal enables you to design and deliver quotes and enroll clients in Blue plans virtually.

### Action Items

1. [If you aren't registered to use the portal, it's easy to do.](#)
2. After registering, [see this resource page](#) on everything you need to know about the Retail Producer Portal.
3. Review instructions for the [OFF-EXCHANGE enrollment pathway](#) via the Retail Producer Portal. (Reminder: the on-exchange enrollment pathway is via beWellnm)

## Learn about our retail product line

The plan year 2023 Individual & Family Markets (IFM) Open Enrollment Sales Training for Producers includes an overview of our individual product line. It also covers networks, pharmacy benefits and much more.

### Action Item

To access sales training, log into [Blue Access for Producers](#), click on the "INDIVIDUAL" icon, select "Training, Admin & Tools" and choose "Annual Individual Product Training."

## Use marketing and sales resources when working with clients

### Action Items

1. See our [Producer Retail Readiness microsite](#). It has links to everything you need to market, sell and enroll.
2. Use our [Producer Supply Portal](#) to order and ship sales kits. For more on the portal, [go here](#).