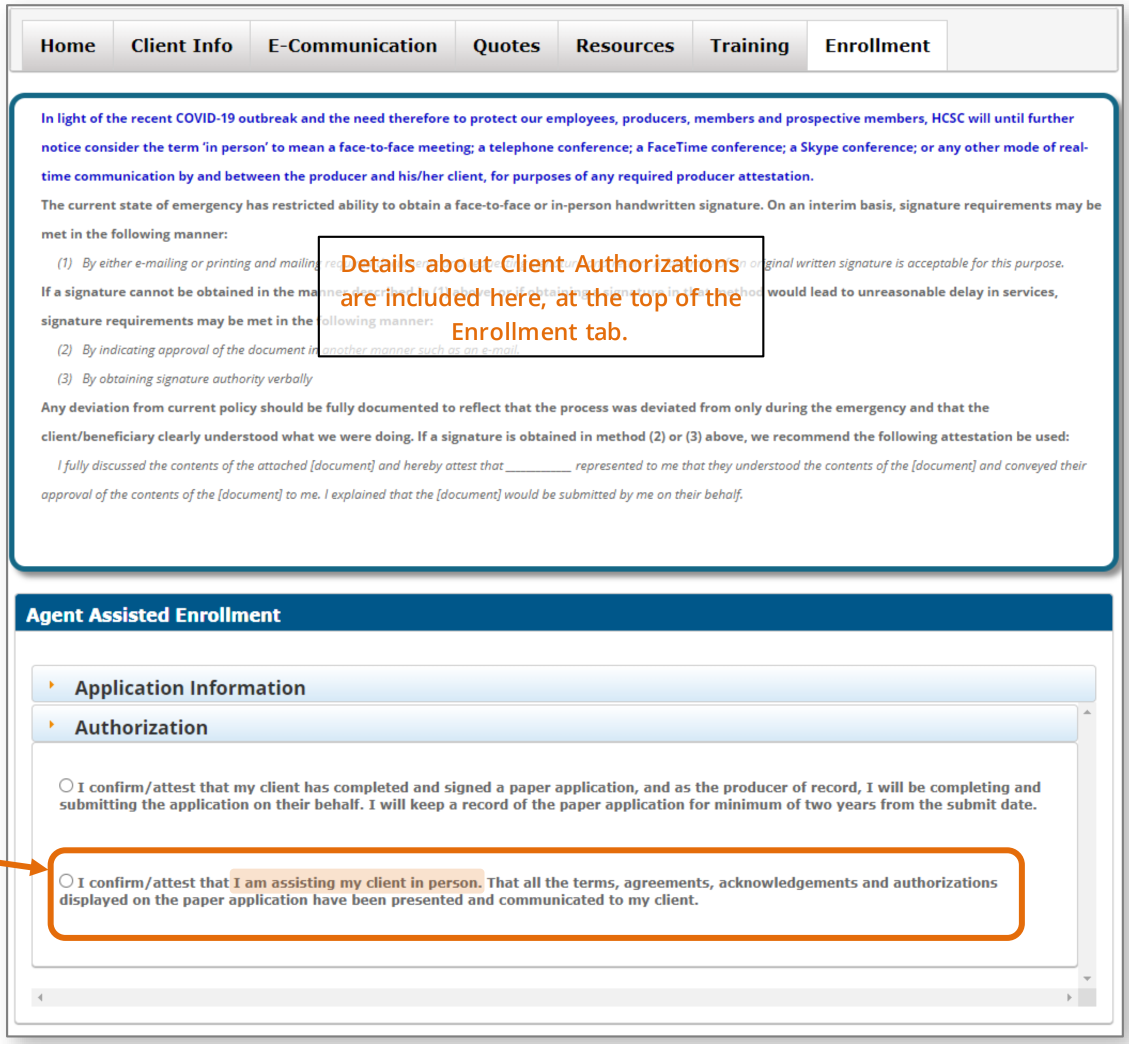
BlueCross BlueShield of Montana

Client Authorizations and the Retail Producer Portal

When completing an online application in the [Retail Producer Portal](), there are two types of client authorizations. You must select one.



The FIRST type of client authorization is when you have a signed paper app in-hand and you enter the data from the paper app into the online app. You keep the paper app with your client's signature for your records.

The SECOND type of client authorization says you're assisting your client "in person." **Until further notice, we consider the phrase "in person" to mean a telephone or online conference (such as Skype, FaceTime or Zoom) or any other real-time communication.**

To meet the requirements for this second type of authorization, you have three options.

1. You can obtain it by either emailing or printing and mailing required documents and requesting a signature and return. A fax or a copy of an original written signature page is acceptable for this purpose.

If an authorization can't be obtained in the manner described in (1.) above, you could obtain it one of these ways:

2. By the client/applicant indicating approval of the document in another manner such as an email.
3. By the producer obtaining a signature authorization verbally.

We recommend creating an attestation statement *each time* a signature is obtained by method (2.) or (3.). You could use the following example attestation. Be sure to save attestations for your records.

> I fully discussed the contents of the attached [DOCUMENT NAME] and hereby attest that [CLIENT/APPLICANT NAME] represented to me that they understood the contents of the [DOCUMENT NAME] and conveyed their approval of the contents of the [DOCUMENT NAME] to me. I explained that the [DOCUMENT NAME] would be submitted by me on their behalf.