BlueCross BlueShield
of Oklahoma

Request Center Tool User Guide

May 2024

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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 *(Renewal Paperwork, Address Change, Grandfathered Certification, etc.)*
- Blue Balance Funded Enrollment *(BBF Renewal & Existing Fully Insured to BBF)*
- New Blue Balance Funded
- 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

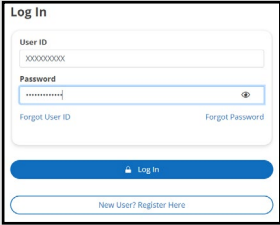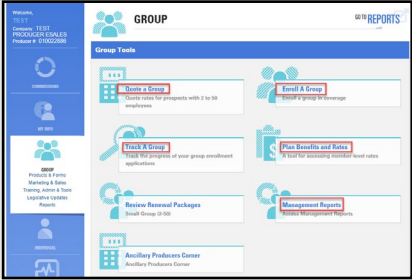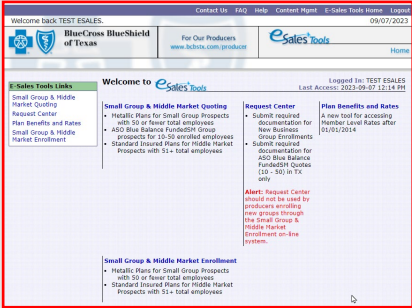7) Use the History button on each request to follow the group's progress
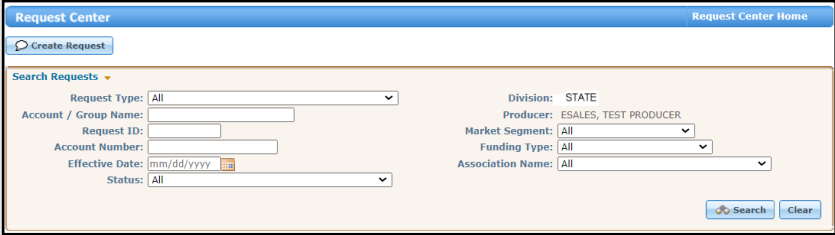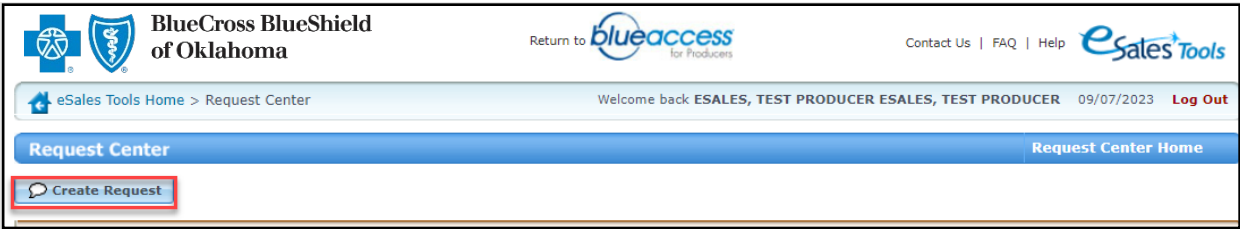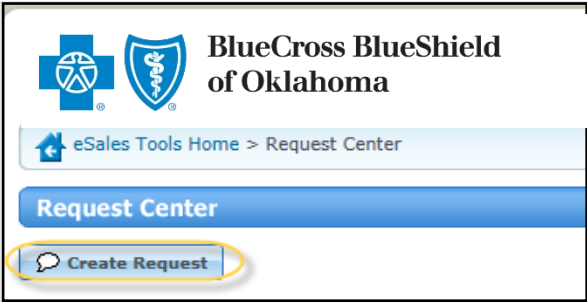
Important:

- 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

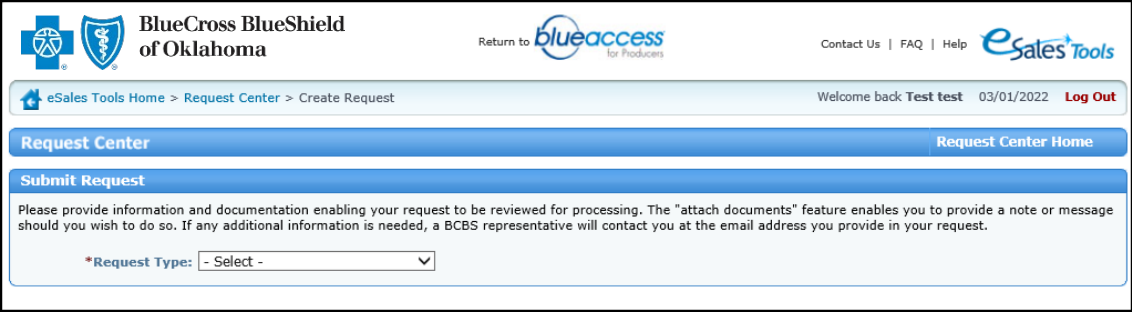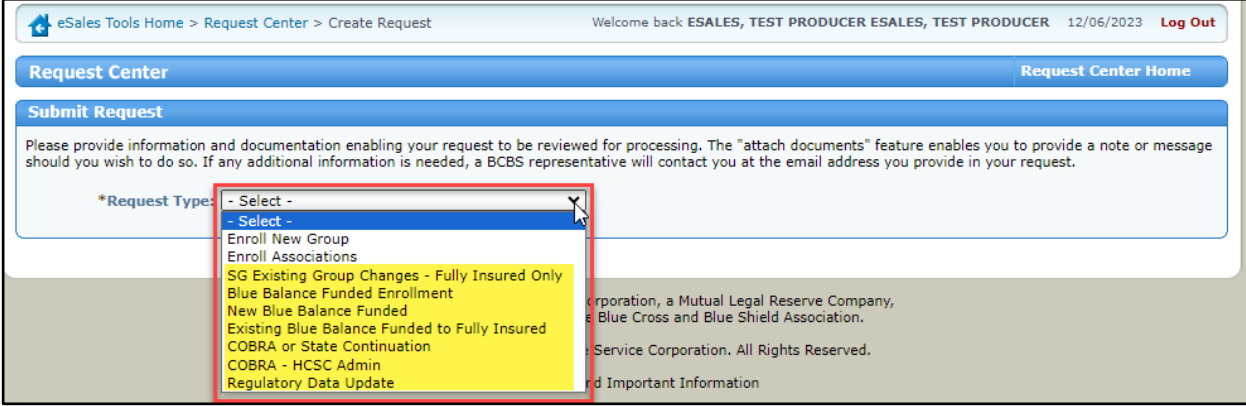- Make a note of your Request ID for easy follow-up

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.bcbsok.com/producer. Log in to Blue Access for Producers℠ (BAP℠). BAP navigates to the **Welcome** page.
Group Sales Tools	Click on one of the Group Tools: eSales homepage will be displayed
Access Request Center	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 Requests:** Allows user to search by 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 Association • **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 **Request Center Home** button on the right
Request Type	**Request Type** Use the drop-down and select a Request Type: **Request Types:** Enroll New Group Enroll Associations SG Existing Group Changes – Fully Insured Only Blue Balance Funded Enrollment New Blue Balance Funded Existing Blue Balance Funded to Fully Insured COBRA or State Continuation COBRA – HCSC Admin Regulatory Data Update **Note:** Enroll New Group and Enroll Associations were existing request types
Request Type 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
- **Email Address:** Enter your email address in this field
  Note: Additional email addresses can be entered by clicking on the Add button
- **Group Name:** Enter the group name listed on paperwork
- **Quote ID:** Enter Quote number (if applicable)
- **Submitted Date:** Defaults to today's date
- **Division:** Defaults to your state
- **Producer:** Defaults to user
- **Funding Type:** Use the drop-down and select Fully Insured
- **Market Segment:** Use the drop-down and select ACA Small Group (2–50)
- **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 the Enrollment Tool.

Required Documents	A message populates in the Submit Request window stating that the Request saved successfully, a **Request ID** number is assigned, and the Documents Needed for Enrollment pane opens. **Note:** If a change is needed for Effective Date field click on the **Change** button. **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. 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.

	  Attachments Select Browse to find a file(s) to attach. Uploaded files must be less than 25MB. **File** — Choose File No file chosen **Document Type(s)** — Select **Description(s)** [Attach File] **Existing Attached Documents** 	File	Date/Time Stamp	Document Type	Description	Name	Status	Delete Document
---	---	---	---	---	---	---
BPA Test.docx	09/07/2023 01:00:36	Benefit Program Application (BPA) for New Small Groups 2-50		ESALES, TEST PRODUCER ESALES, TEST PRODUCER	COMPLETED	☒ Delete Document	 **Deleted Documents** 	File	Date/Time Stamp	Document Type	Description	Name
---	---	---	---	---	
Delete Documents	If the wrong document was attached, click on the **Delete Document** link to remove it from the list. **Existing Attached Documents** 	File	Date/Time Stamp	Document Type	Description	Name	Status	Delete Document
---	---	---	---	---	---	---
BPA Test.docx	09/07/2023 01:00:36	Benefit Program Application (BPA) for New Small Groups 2-50		ESALES, TEST PRODUCER ESALES, TEST PRODUCER	COMPLETED	☒ Delete Document | A confirmation message populates asking if you are sure you want to delete the document. Select OK or Cancel (whichever applies). **Confirmation Message** ⚠ Are you sure you want to delete the document? [Ok] [Cancel] The deleted document will then show in the **Deleted Documents** section. **Attachments** Select Browse to find a file(s) to attach. Uploaded files must be less than 25MB. **File** — Choose File No file chosen **Document Type(s)** — Select **Description(s)** [Attach File] **Existing Attached Documents** | File	Date/Time Stamp	Document Type	Description	Name	Status	Delete Document
---	---	---	---	---	---	---
BPA Test.docx	09/07/2023 01:00:36	Benefit Program Application (BPA) for New Small Groups 2-50		ESALES, TEST PRODUCER ESALES, TEST PRODUCER	COMPLETED	☒ Delete Document	 **Deleted Documents** 	File	Date/Time Stamp	Document Type	Description	Name
---	---	---	---	---
EGI Test.pdf	09/07/2023 01:03:52	Employer Group Information (EGI) Form		ESALES, TEST PRODUCER ESALES, TEST PRODUCER	 **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.** [Discontinue] * - Required Fields [Save] [Submit] Request Submitted message populates. **Request Submitted** Demo Group request has been submitted and further review with Request ID 379398.

Request Type Enroll Associations	The Submit Request window expands and contains additional required fields when the following request type is selected: **Enroll Associations**

- **Email Address:** Enter your email address in this field
  Note: Additional email addresses can be entered by clicking on the Add button
- **Group Name:** Enter the group name listed on paperwork
- **Quote ID:** Enter Quote number (if applicable)
- **Submitted Date:** Defaults to today's date
- **Division:** Defaults to your state
- **Producer:** Defaults to user
- **Funding Type:** Use the drop-down and select Fully Insured
- **Market Segment:** Use the drop-down and select MEWA
- **Effective Date:** Use the drop-down to select appropriate effective date of group
- **Association Name:** Use the drop-down to select appropriate association

Once all required information is entered, click Continue. |

Submit Request	Request saved successfully message and a Request ID populates at the top of the screen, along with attached documents section for request type: **Enroll Associations** **Submit Request** Request saved successfully. **Request ID 379552.** Please provide information and documentation enabling your request to be reviewed for processing. The "attach documents" feature enables you to provide a note or message should you wish to do so. If any additional information is needed, a BCBS representative will contact you at the email address you provide in your request. *Request Type: Enroll Associations * Email Address: [ ] ⊞ Add *Group Name: Test Note: A Fully Insured Quote ID must be provided to request a Blue Balance Funded Quote. ✎ Change Quote ID: [ ] *Submitted Date: 09/11/2023 *Division: Oklahoma *Producer: ESALES, TEST PRODUCER *Funding Type: Fully Insured ▾ *Market Segment: MEWA ▾ *Effective Date: 10/01/2023 ▾ *Association Name: [▾] Please attach the following documents. For questions, please contact your Sales representative. 📎 **Attach Documents** *Completed Master Application ☒Missing *Final Enrollment Census ☒Missing *Final Quote (PDF) ☒Missing *Proof of Association Membership ☒Missing *Proof of Business ☒Missing *Proof of Wages ☒Missing *Signed AHP Employer Agreement ☒Missing ⓘ Signature Required Supplemental Employer Verification Form Discontinue * - Required Fields Save Submit
Attach Required Documents	To attach documents, click on the **Attach Documents** button. Please attach the following documents. For questions, please contact your Sales representative. 📎 Attach Documents ← The Attachments window opens. Click the **Choose File** button; locate the drive and folder where the documents are saved and select the file to upload. **File** [Choose File] No file chosen 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. **File** **Document Type(s)** **Description(s)** [Choose File] No file chosen Select ▾ [ ] Attach File **Existing Attached Documents** | File	Date/Time Stamp	Document Type	Description	Name	Status	Delete Document
---	---	---	---	---	---	---
ECMTEST2.TIF	09/07/2023 01:31:31	Completed Master Application		ESALES, TEST PRODUCER ESALES, TEST PRODUCER	COMPLETED	☒ Delete Document	 If the wrong document was attached, click on the **Delete Document** link to remove it from the list.

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

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.

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 **Submit** button to move the case to **Request Review.** **NOTE**: Clicking on the Save button will only save the request in Request Center but will not Submit the request for review. Request Submitted populates with a Request ID:
Request Type 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:

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
- **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 *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. The request is now submitted for review.
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.

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Request Type Blue Balance Funded Enrollment	The Submit Request window expands and contains additional required fields when the following request type is selected: **Blue Balance Funded Enrollment** Select a Submission Type from the drop-down: Result: Following selection of Submission Type, the following fields will be displayed:

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- **Account Number:** Enter the account number (if applicable)
- **Division:** Defaults to your state
- **Account Name:** Populates when account number and division are entered or can be manually 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 or can be selected from drop-down
- **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 Enrollment** Follow the Attach Document step above to attach any documents and submit the request.

Submit Request

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. **Request ID 380342.**

Please provide information and documentation enabling your request to be reviewed for processing. The "attach documents" feature enables you to provide a note or message should you wish to do so. If any additional information is needed, a BCBS representative will contact you at the email address you provide in your request.

*Request Type:	Blue Balance Funded Enrollment
* Submission Type:	Existing Blue Balance Funded Renewal
*Account Number:	Y02319
*Division:	Oklahoma
*Funding Type:	Fully Insured
*Effective Date:	08/01/2024
*Submitter Email Address:	testid@bcbsok.com

Change

*Producer: ESALES, TEST PRODUCER
Account Name: Oklahoma Test Account
*Market Segment: Small Group (10-50)

Notes: -- Optional Notes entered here --

Please attach the following documents. For questions, please contact your Sales representative.

📎 Attach Documents

Documents Needed for Request

*Administrative Service Agreement (ASA)	❌ Missing
*Business Associate Agreement (BAA)	❌ Missing
*Stop Loss Application	❌ Missing
*ASO BPA	❌ Missing
*Addendum	❌ Missing
*Blue Balance Funded Quote/Renewal	❌ Missing
Benefitwallet 113A Employer Set Up Form	
Census or Member Mapping Instructions	

Discontinue   * - Required Fields   **Save** **Submit**

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

Request Submitted

Oklahoma Test Account Request has been submitted and further review with Request ID **380342.**

Review Request

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

Search Requests ▾

Request Type:	All	Division: Oklahoma
Account / Group Name:	oklahoma t	Producer: ESALES, TEST PRODUCER
Request ID:		Market Segment: All
Account Number:		Funding Type: All
Effective Date:	mm/dd/yyyy	Association Name: All
Status:	All	

🔍 Search **Clear**

	Account / Group Name	Account Number	Status	Request ID	Request Type	Division	Effective Date
View	Oklahoma Test Account	123456	Std Mkts Request Pending Internal Review	379563	Blue Balance Funded Enrollment	Oklahoma	12/01/2

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

Request Type New Blue Balance Funded	The Submit Request window expands and contains additional required fields when the following request type is selected: **New Blue Balance Funded** • **Account Number:** Enter the Account Number (if applicable) • **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. **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: **New Blue Balance Funded** Follow the attach document step above to attach any documents and click on save and submit the request.

	Submit Request 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. **Request ID 380343.** Please provide information and documentation enabling your request to be reviewed for processing. The "attach documents" feature enables you to provide a note or message should you wish to do so. If any additional information is needed, a BCBS representative will contact you at the email address you provide in your request. *Request Type: New Blue Balance Funded Account Number: **Change** *Division: Oklahoma *Producer: ESALES, TEST PRODUCER *Funding Type: ASO Blue Balance Funded℠ Account Name: DEMOGROUP OK *Effective Date: 08/01/2024 *Market Segment: Small Group (10-50) *Submitter Email Address: test@bcbsok.com Notes: -- Optional Notes can be entered here -- Please attach the following documents. For questions, please contact your Sales representative. **Attach Documents** **Documents Needed for Request** *Administrative Service Agreement (ASA) ✗Missing *Business Associate Agreement (BAA) ✗Missing *Stop Loss Application ✗Missing *ASO BPA ✗Missing *Addendum ✗Missing *Blue Balance Funded Quote/Renewal ✗Missing *Proof of Wages ✗Missing *Proof of Business ✗Missing **Discontinue** * - Required Fields **Save** **Submit** Click on the **Submit** button to submit the request for further review. **Request Submitted** DEMOGROUP OK Request has been submitted and further review with Request ID 380343. The request is now submitted for review.
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.

Request Type 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. **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**

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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 using criteria available and click **Search**.

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

Request Type 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**

Select a Submission Type from the drop-down:

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 using criteria available and click **Search**.

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	To view information, you can select the **View** button next to the account.
Request Type COBRA – HCSC Admin	The Submit Request window expands and contains additional required fields when the following request type is selected: **COBRA – HCSC Admin** - **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 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 – HCSC Admin** Follow the attach document step above to attach any documents and click on save and submit the request.

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Submit Request

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. **Request ID 380346.**

Please provide information and documentation enabling your request to be reviewed for processing. The "attach documents" feature enables you to provide a note or message should you wish to do so. If any additional information is needed, a BCBS representative will contact you at the email address you provide in your request.

*Request Type: COBRA - HCSC Admin

*Account Number: Y02319   [Change]

*Division: Oklahoma   *Producer: ESALES, TEST PRODUCER

*Funding Type: Fully Insured   Account Name: DemoGroup Test OK

*Effective Date: 07/01/2024   *Market Segment: ACA Small Group (2-50)

*Submitter Email Address: testid@bcbsok.com

Notes: -- Additional Notes can be added here. --

Please attach the following documents. For questions, please contact your Sales representative.

[Attach Documents]

Documents Needed for Request

*HCSC COBRA Agreement	Missing
*HealthEquity COBRA New Client Application	Missing
*HealthEquity COBRA Additional Carrier and Plan Information Form	Missing
Email	
Other	

[Discontinue]   * - Required Fields   [Save] [Submit]

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

Request Submitted

DemoGroup Test OK Request has been submitted and further review with Request ID 380346.

Review Request

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

Request Center   Request Center Home

[Create Request]

Search Requests ▾

Request Type: All   Division: Oklahoma
Account / Group Name: Producer: ESALES, TEST PRODUCER
Request ID: Market Segment: ACA Small Group (2-50)
Account Number: Funding Type: Fully Insured
Effective Date: 07/01/2024   Association Name: All
Status: All

[Search] [Clear]

	Account / Group Name	Account Number	Status	Request ID	Request Type	Division	Effective Date
[View]	DemoGroup Test OK	Y02319	Std Mkts Request Pending Internal Review	380346	COBRA - HCSC Admin	Oklahoma	07/01/

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

	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.
Request Type Regulatory Data Update	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
	• **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. **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 using criteria available and click **Search**. To view information, you can select the **View** button next to the account.

Request Needing Attention	**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.
	Click on the **View** button next to the request needing updates. You 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.

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Attachment Button

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

The request will go back to the processor with proper documentation. |

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Request Completion	**Request Completion** After your Request has been worked, you will receive 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.

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Status Definitions	• Std Mkts Account Processing in Progress *(Request was submitted and is being reviewed 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 received by internal personnel and will continue to be reviewed and processed)* • Std Mkts More Information Required *(Request has been sent back to external submitter for more information)* • 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 Completed *(Request has been completed, no further action required.)* • Std Mkts Request Discontinued *(Request has been discontinued per request or due to account inactivity from external user (ex: More Information Required was not received) and a new request will need to be created)* • 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 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 Initiated *(Email that is sent with initiation of request)* **(soon to be eliminated and replaced when Pending Internal Review)** • 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)* • 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)*