

Blue Cross Blue Shield of Georgia
Agent of Record (AOR) Policy for Individual Plans
(Effective January 1, 2009)

Our goal is to partner with you to conserve your clients who have coverage with Blue Cross Blue Shield of Georgia (BCBSGA). We prefer that a client never have a need to seek out a new agent.

Agent Requirements:

1. Agent must be licensed and actively appointed with BCBSGA.

Guidelines:

1. The request must be from the customer on our BCBSGA Agent of Record Change Request Form. No other letter or form will be accepted.
2. The Agent of Record Change Request Form should contain the new agent's name (not agency), and the new agent's writing number.
3. The "Authorization to Release PHI" form completed in full indicating the new agent's name and signed by the client must accompany the BCBSGA Agent of Record Change Request form.
4. Member's Contract must be in place for 12 months prior to Agent of Record Change Request.
5. Completed forms must be received by BCBSGA by the 15th of the month in order to be effective the 1st of the following month.
6. Retroactive commission adjustments are not allowed
7. Commissions will be paid at 5% for all approved Agent of Record Changes. These contracts will not count as new sales, and are excluded from all incentive bonus plans.
8. Only one Agent of Record Change is permitted per 12 calendar months on each contract.
9. If the request for Agent of Record Change is missing information or denied, BCBSGA will notify the agent by fax.

Communication:

If you submit an Agent of Record Change to BCBSGA that does not meet the above guidelines, you will be notified via fax from BCBSGA indicating the reason for denial.

The agent should fax the completed Agent of Record Change Request form along with the Authorization to Release PHI form to:

BCBSGa
Consumer Services
877-273-7146