



# Summary of Benefits and Coverage Tool Steps

## No Login Requirements

Use the link on the right or continue to use **Blue Access for Employers<sup>SM</sup>** or **Blue Access for Producers<sup>SM</sup>**.



Steps to use the SBC Tool	
<b>STEP 1:</b>	Click <b>Customize</b> to begin. <b>TIP</b> — Use the <b>Standard Plan SBC Tool</b> to order SBCs for metallic plans with effective dates before 2021, and for all grandfathered and transitional plans.
<b>STEP 2:</b>	<ul style="list-style-type: none"> <li>For Small Group SBCs, enter the Plan ID in the Plan ID field.</li> <li>For Mid-Market SBCs, enter the Plan ID in the MPI field.</li> <li>For Blue Balance Funded<sup>SM</sup>, enter the Plan ID in the MPI field.</li> <li>Identify the plan year and state. Other search fields are optional.</li> <li>Select English or Spanish.</li> <li>Click <b>Search</b>.</li> </ul> <div style="border: 1px solid #0070C0; padding: 5px; background-color: #0070C0; color: white; margin-top: 10px;"> <p><b>TIPS</b></p> <ul style="list-style-type: none"> <li>Blue Balance Funded is a separate Market Segment drop-down option.</li> <li>DD/MM/YY is the date format for <b>Spanish SBCs</b>.</li> </ul> </div>
<b>STEP 3:</b>	<ul style="list-style-type: none"> <li>Available SBCs will appear in the <b>Results</b> section.</li> <li>If the Plan ID or MPI were not included in the search, a full list of benefit plans will appear in the <b>Results</b> drop-down tab.</li> <li>Select your requested SBC and click <b>Next</b>.</li> </ul>
<b>STEP 4:</b>	<b>Choose</b> the required plan effective dates. "Coverage for" will default to Individual/Family. Click <b>Next</b> .
<b>STEP 5:</b>	<b>Review the proof carefully.</b> Check to make sure the correct period and coverage is populated on page 1 of the PDF in the upper right corner. Click <b>View PDF Proof</b> to download, save or print the SBC.
<b>STEP 6:</b>	Close the PDF pop-up window to complete your order.



### Technical Help

If an SBC is missing or additional assistance is needed, please reach out to [StandardSBCRequests@bcbstx.com](mailto:StandardSBCRequests@bcbstx.com).