FMO & Agent Overview

This guide will help you access and navigate the demo environment. It includes login information, key features to explore, and useful tips to make the most of your session. This guide helps illustrate the different logins for Brokers and FMOs. As discussed, the brokers will be using the agent portal and also back office for when they need to access reports. FMOs will be using the Back Office only where they can access their website sign up link, reports, add/edit license/documents, view their brokers, and edit their profile. This guide provides an overview of the demo environment, including login information, key features, and tips for optimal use. It outlines distinct login processes for Brokers and Field Marketing Organizations (FMOs).

URLS

Back Office URL - `https://broker.innovage.com/manage/`

Agent Portal UAT URL - `http://www.1enrollment.com/InnovageTestAgentPortal`

Agent Portal Production URL - `http://broker.innovage.com/`

Test Credentials

- **FMO**
  - `testShaer1231231`
  - `Test1234!`
- **Agent**
  - `TroySeguro123!`
  - `TroySeguro123!!`

1. Roles and Access

- **Brokers:** Access the Agent Portal for daily operations and the Back Office for reports.

FMOs: Access the Back Office exclusively to manage their website sign-up links, access reports, add/edit licenses and documents, view their brokers, and edit their profiles.

3. Agent Portal Navigation

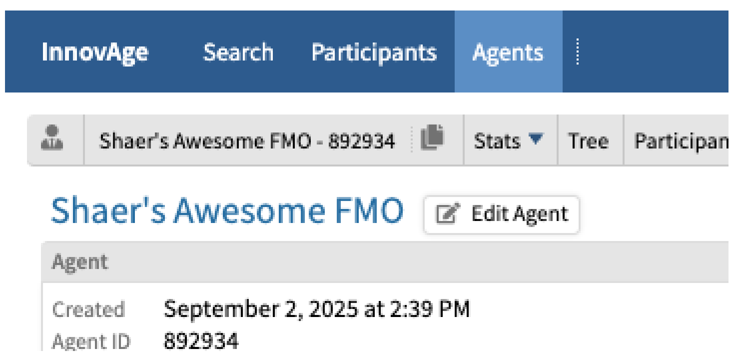
The Agent Portal offers the following functionalities:

- **My Documents:** Contains all agent-specific documents, including signatures, E&O insurance forms, and agent commission history.
- **Members:** Allows searching for participant applications associated with the agent.
- **Sales and Marketing Resources:** Provides access to up-to-date resources for both

agents and FMOs.

- **Back Office:** Enables agents to access various reports, including:
    - Enrollment Status Report
    - Book of Business Report
    - Ready to Sell Report
- **License:** Displays the agent's license information. Licenses can be added or edited via the Back Office by editing the agent's profile.
- **Participant Application:** Directs to the "cart" where agents can initiate lead collection.
- **Your Information:** Allows agents to update their personal information within the portal.

4. Sample Test Cases

- **Feature 1: FMO Sign-up**
    - Sign up as an FMO using the link: https://broker.innovage.com/agents/signup.cfm?id=886434&code=buffalo
        i. Upload an E&O insurance document and license to ensure visibility in the Back Office.
    - After completing signup, navigate to back office login in with new credentials
        i. https://broker.innovage.com/manage/
    - After logging in test the following
        i. View/Update Information & Agent Contracting Link
            1.
            2. 

        ii. Add/Edit License
        iii. Add/Edit Documents
            1. E&O Insurance
            2. W-9
        iv. Sales and Marketing Resources
        v. Reports
            1. Home Bar > Participants > Saved List
                a. Book Of Business
                b. Enrollment Status
        vi. View Agents
            1. Home Bar > Agents > View Agents
    -

- **Feature 2:** Sign up as an Agent using the link: https://broker.innovage.com/agents/signup.cfm?id=886434&code=sega
    - Upload an E&O insurance document and license to ensure visibility in the Back Office.
    - After completing signup, navigate to UAT Agent Portal login in with new credentials. ***Note that this is the UAT Agent Portal so this is a different URL than Prod***
        i. http://www.1enrollment.com/InnovageTestAgentPortal
    - After logging in test the following
        i. My Documents
            1. View Commission Statements
            2. E&O insurance documents
            3. Signatures
        ii. My Members
            1. Any participant applications under this broker
        iii. Participant Application
            1. Should direct you to the Cart where you are directed to enter in a zip code
        iv. Back Office
            1. This will open a new window where you will be prompted to login to the back office now. It will be the same credentials you used for the agent portal.
            2. Reports
                a. Home Bar > Participants > Saved List
                    i. Book Of Business
                    ii. Enrollment Status
                b. Home Bar > Agents > Saved List
                    i. Ready to Sell
        v. Licenses
            1. View license
        vi. Sales and Marketing Resources
            1. View information to verify it is all up to date
        vii. Your Information
            1. Update
