Navigate Your Broker Portal

Details

Online enrollment helps you and your clients save time during benefits enrollment and ongoing management by eliminating paper forms, reducing errors, and creating digital files.

- The value here lies in the fact that less time is spent collecting and reviewing forms, determining eligibility, and communicating benefit details.
- For employees, they can easily compare their benefit options and select the ones best suited to their specific needs.

To understand how your broker portal (https://[domain].ease.com) is structured:

There are a number of fields, buttons, tabs, and tools available in the system and accessible from broker portal menus. Initially, Ease opens your portal on the Home page.

TOP MENU options:

- **Home** – View your company information
- **To-Dos** - Access Changes, Task, Connections, and Renewals
- **Companies** – Access companies managed by your brokers
- **Reports** – Access reports you have generated, generate standard reports, view changes for your company, or see feedback from employees
- **Libraries** - Contain forms and plans available to add to your company sites
- **Marketing** - access to a resource library with materials to assist with introducing online enrollment with Ease.

MAIN SCREEN options:

- **Upcoming Renewals** - includes notification of renewals for connected plans
- **Recently Viewed Companies** - includes a visual color-coded progress tracker for enrollment
- **Enrollment Progress** - for companies currently in Open Enrollment

- Access progress or new employees using **See New Hire Progress**
- **Statistics** - total demographic counts as well as enrollment progress for all companies within your portal

Click icon in upper right of screen to access USER MENU options:

- **My Agency** – For system administrators only, provides access to manage broker portal
- **Settings** – Allows users to manage their login settings
- **Support** - access to support resources such as articles and the ability to submit a request for help
- **Logout** – Logs out of the session

For Broker Administrators only, from MY AGENCY:

When you may need more information on the fly, TOOL TIPS are embedded throughout the system. Tool Tips are circled question marks next to fields where you might want more information. If you hover over the question mark, more information about field displays. Click learn more to visit the full Knowledge article on the topic.

Many areas in Ease have an ACTIONS button where you can access tools and perform different tasks.

MAIN MENU – navigate to the main areas of the system. Options are:

- **Profile** - add/update your organization, used to establish security access to companies
- **Employees** - access and add broker portal users
- **Companies** - access and add companies
- **Submissions** - review outcomes of data submitted via integrations by the company
- **Documents** - provide private documents to your team and/or Ease support
- **Logins** - manage user logins, email activity, and enhanced user security options
- **Marketplace** – View and enable connections, integrations, and services
- **Settings** -branding your portal, creating and managing email templates, and billing information

DETAIL MENU – Navigate to areas of the system where you can edit information or access specific profiles