

# Navigate Libraries

## Details

From Libraries in top menu

Brokers can access universally available FORMS and create custom libraries to expedite the process of adding plans to their company sites.

To find out more, see [Forms Library](#).

When employers offer similar plan options, a PLANS library allows you to quickly and more efficiently add plans to a company site.

- Plan Libraries are available with Agency and Enterprise subscriptions.
- Plan Libraries can be shared within the agency or brokerage and do not have to be duplicated by each agency employee.
- We recommend being as detailed as possible when naming the Plan Library.
  - If a library is created for age-rated medical plans by rating area, we recommend including the rating area as well as the quarter and year for which these rates are effective.
  - A new library will need to be created each quarter to add new rates and plan information.

To add a plan library:

1. Click Add Library.

2. Enter name for your library.
3. Click Add Library.

Once Library has been added:

- [Add Plan to Library](#)
- [Add Plan from Library](#)

If using documents for multiple companies, create DOCUMENTS Libraries.

To add a document library:

1. Click Add Library.
2. Enter name for your document library.
3. Click Add Library.

End of Procedure