

# SAMPLE USER GUIDE

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## BrokerEngage Portal

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## Revision History

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# 1 Introduction to Broker Engage

Broker Engage is a web-based application, help consumers and small groups shop, receive quotes, and enroll for insurance and benefits across multiple carriers/multiple products.

Salient features of Broker Engage:

- Branded solutions for individual, group, and medicare segments
- All client data in one location, secure access, and cloud storage.
- Multicarrier broker portals
- Web based tools and mobile applications
- Simple, online enrollment solution
- Integrated Billing Solutions
- Support for state exchanges / private exchanges
- Commission calculations
- Robust analytics and reporting

## 2 Agents

Insurance agents are responsible for selling the insurance plans by figuring out potentials customers.

Broker Engage applications help the agents to minimize the human efforts and record the agent activities.

Following functionalities are available in our software applications:

- No need to create a consumer profile and account in healthcare.gov.
- Eliminate paper enrollment through a web-based application.
- Accessible from anywhere.

### 3 Login as an Agent

Tenant Admin adds a new agent in the broker engage application, while adding Agent's login credentials will be created and the same will be sent to Agent's email id.

Your agency **Master** has been successfully registered!!!

Your login credentials are:

**User Name :** xxxxxxxx

**Password :** xxxxxx

[Click here](#) to login.

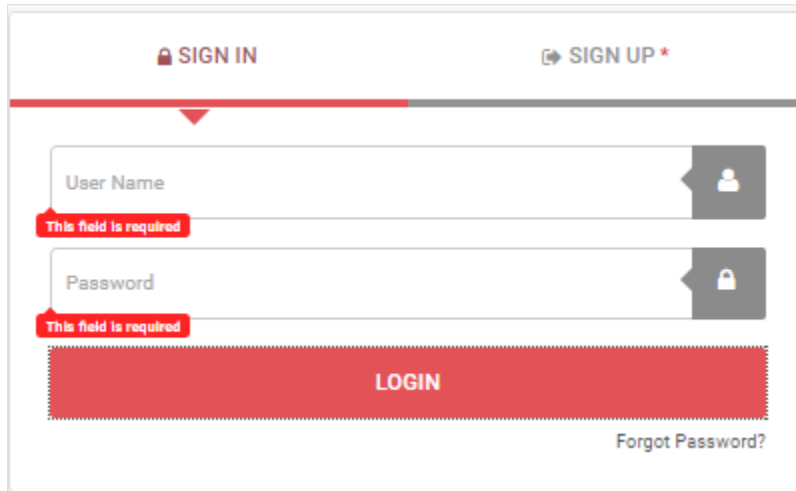
As an agency administrator, among other things you may add contacts and review applications by other agents.

Sincerely,  
Administrator

Benefitalign

## Sign in to the benefitalign portal

Enter the credentials received through the email and login to the application.



The image shows a sign-in form for the 'benefitalign' portal. At the top, there are two tabs: 'SIGN IN' (active) and 'SIGN UP \*'. Below the tabs, there are two input fields: 'User Name' and 'Password'. Both fields have a red error message 'This field is required' next to them. To the right of each input field is a small icon: a person icon for the User Name field and a lock icon for the Password field. Below the input fields is a large red button labeled 'LOGIN'. To the right of the 'LOGIN' button is a link labeled 'Forgot Password?'.

## 4 Notifications

You can find all your notifications here. Click the appropriate tab and view notifications which are pending, informational or archived.

**Date Range** – Select from date and to date and click search to view the notifications within that date range.

The screenshot shows the 'Notifications' page in a web application. On the left is a sidebar menu with items: Dashboard, Notifications (highlighted), Agency Details, Agency Contacts, Agent Associations, Customer, Quotes, Applications, Carrier Appointments, User Carrier Appointments, and Report. The main content area is titled 'Notifications' and contains the following elements:

- 1**: Instructional text: 'Find all your notifications here. Click the appropriate tab and view notifications which are pending, informational or archived.'
- 2**: 'Date Range' filter section with two input fields for 'MM/DD/YYYY' separated by a slash, and 'Search' and 'Clear' buttons.
- 3**: Tabbed interface with three tabs: 'Pending' (selected), 'Informational', and 'Archived'.
- 4**: Table header with columns: 'Description', 'Received Date', and 'Action'.
- 5**: A notification entry: 'New agency named MasterAgency is registered successfully' with a date of '02/15/2017'.
- 6**: A 'Done' button with a checkmark icon.
- 7**: A line pointing to the 'Agency Contacts' item in the sidebar menu.



1 - **Date Range** (refer Figure 2: Notification Page)

Figure 2: Notification Page.

- Select **from date** and **to date** from the pop-up calendar.

2 - **Clear** (refer Figure 2: Notification Page)

3 - **Search** (refer Figure 2: Notification Page)

4 - **Archived** (refer Figure 2: Notification Page)

Pending			Informational			Archived		
Description			Received Date			Action		
🔔 New agency named MasterAgency is registered successfully			02/15/2017					

- You can view the description, received date and the action needs to be done on the notifications.

5 - **Informational** (refer Figure 2: Notification Page)

Pending	Informational	Archived
Description	Received Date	Action
There are no notifications at this time.		

---

6 - **Done** (refer Figure 2: Notification Page)

---

7 - **Pending** (refer Figure 2: Notification Page)

- You can view the description, received date and the action needs to be done on the notifications.
-

## 5 Agency Details

Agent can view or edit the agency details in **My Profile** tab. This tab will display the marketing URL.

The screenshot shows a sidebar menu on the left with options: Dashboard, Notifications, Agency Details (highlighted), Agency Contacts, Agent Associations, Customer, Quotes, Applications, Carrier Appointments, and User Carrier Appointments. The main content area is titled 'My Profile' and contains four sections:

- Agency Detail** (Callout 1): MasterAgency | 16626 , Tax Classification: Individual/Sole Proprietor , 312893123. Includes an 'Edit' link.
- Address** (Callout 2): 221 B baker street, South London, Antelope, Oregon, 97001. Includes an 'Edit' link.
- Primary Contact Information** (Callout 3): Master Agency , emailid@test.com , (329) 847-2342. Includes an 'Edit' link.
- Marketing Details** (Callout 4):
  - Individual Marketing Url:** https://uat-be.benefitalign.com/benefitalign/home/MarketingInd?id=53ABA3DDCA31BECF89E100500DE34103&PID=&SourceChannel=&CampaignID=
  - Employer Group Marketing Url:** https://uat-be.benefitalign.com/benefitalign/home/MarketingInd?id=53ABA3DDCA31BECF89E100500DE34103&PID=&SourceChannel=&CampaignID=&BussinessType=Commercial SG

1 - **Agency Detail** (refer Figure 3: Agency Details)

2 - **Address** (refer Figure 3: Agency Details)

**3 - Primary Contact Information** (refer Figure 3: Agency Details)

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**4 - Marketing Details** (refer Figure 3: Agency Details)

*Note: Plans won't show up until you map your carrier appointments. You may want to make sure you mapped them.*

SAMPLE

## 6 Agency Contacts

An agency administrator can add contacts of the agency administrator, agents, and office staffs in the application using this Agency Contacts tab.

The screenshot displays the 'Agency Contacts' interface. On the left is a sidebar menu with options: Dashboard, Notifications, Agency Details, Agency Contacts (highlighted), Agent Associations, Customer, Quotes, Applications, Carrier Appointments, User Carrier Appointments, and Report. The main content area is titled 'Agency Contact' and includes a search bar (1), an 'Advance Search' button (2), and a 'Clear' button (3). An 'Add Contact' button (4) is located at the top right. Below the search bar is a table of contacts:

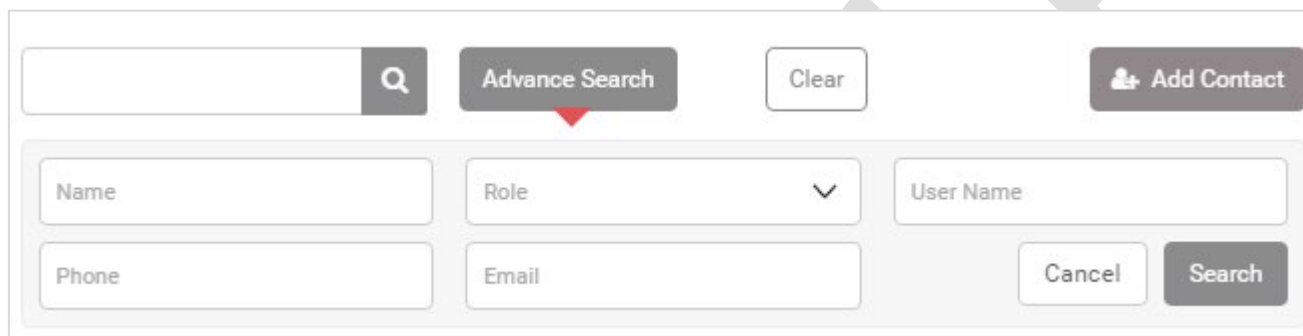
Will smith   Agent	Request for Login	View Details
John smith   Agent	Request for Login	View Details
Master Agency   Agency Administrator		View Details

Each 'View Details' link is accompanied by a red downward arrow icon. At the bottom of the table, there is a 'List Per Page' dropdown set to 10 (7) and a pagination indicator showing '1 - 3 of 3' with navigation arrows. Numbered callouts 1 through 7 point to the search bar, Advance Search button, Clear button, Add Contact button, View Details link, View Details dropdown arrow, and List Per Page dropdown respectively.

**1 - Search** (refer Figure 4: Agency Contacts)

- Click the **"Magnifying glass"**  icon.

**2 - Advanced Search** (refer Figure 4: Agency Contacts)



The image shows a screenshot of an 'Advanced Search' form. At the top, there is a search bar with a magnifying glass icon, an 'Advance Search' button, a 'Clear' button, and an 'Add Contact' button. Below this, there are several input fields: 'Name', 'Role' (with a dropdown arrow), 'User Name', 'Phone', and 'Email'. At the bottom right of the form, there are 'Cancel' and 'Search' buttons. A red arrow points to the 'Advance Search' button.

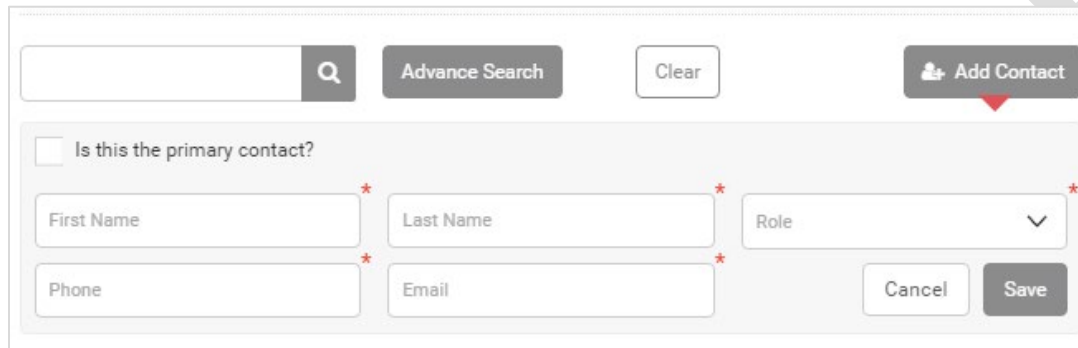
Field	Description
Name	Enter the Agent/Agency admin/Office staff name which was already registered in the application
Role	Click to see the dropdown list of the Roles, select the applicable role (Agency Administrator, Agent, and Office Staff).
User Name	Enter the registered Username of the Agent/Agency admin/Office staff.
Phone	Enter the registered phone number of the Agent/Agency admin/Office staff.
Email	Enter the registered email id of the Agent/Agency admin/Office staff.
Search	Click the <b>Search</b> button to initiate the search command.
Cancel	Click the <b>Cancel</b> button to cancel the search command.

### 3 - Clear (refer Figure 4: Agency Contacts)

- Click the **Clear** button to clear the information entered in the search fields.

### 4 - Add Contact

- Click the **Add Contact** button to add the agency administrator, agents and office staff in your agency.



Field	Mandatory	Description
First Name	Yes	Specify the first name of the employee. Name should not exceed 50 characters. If the input first name contains any special characters except hyphens and apostrophes and numbers other than alphabets, the application displays the error message: "First name can only contain letters"
Last Name	Yes	Specify the last name of the employee. Name should not exceed 50 characters. If the input last name contains any special characters except hyphens and apostrophes and numbers other than alphabets, the application displays the error message: "Last name can only contain letters"
Phone	Yes	Specify the valid Phone number
Email	Yes	Specify the valid email id
Save	No	Click the <b>Save</b> button to save the new contact
Cancel	No	Click the <b>Cancel</b> button to cancel adding new contact

### 5 - Request for Login (refer Figure 4: Agency Contacts)

- Click the **Request for Login** button to send an email to the registered email id of the Agency Admin/Agent/Office staff.

- Click the **Click here** link in the mail received in your registered mail id to register new agent. Refer to [Agent Registration](#).

Hi Will smith

Welcome to Benefitalign We look forward to working with you and your agency.

Please [click here](#) to create your account on our online service portal.

To ensure your success, make sure that:

- Your **FFM login credentials** are up- to- date.
- All **carrier appointments** are included in your profile.
- Your **marketing link** is added while mailing prospects or on social media.

Sincerely  
Benefitalign



6

**- View details** (refer Figure 4: Agency Contacts)

- Click the view details to view the Personal Details, FFM login information and Address of the Agent.
- Click the **Edit** button if you want to edit the existing information.
- Click the **Add button** to add a new information.

Will smith | Agent Request for Login View Details

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✦ **Personal Details:** Will smith | vigneshsrinivasan.s@benefitalign.com | (423) 432-2342 Edit

| NPN:

No login to display

✦ **FFM Login:** Edit

✦ **No Address to display.** Add

7

**- List per page** (refer Figure 4: Agency Contacts)

- Click the drop down menu of the **List per Page** and select the number of agent/agent admin/office staff details you want to see in a single page.

## 7 Agent Registration

Agents required to fill the necessary details.

**Agent Registration**

**Contact Information \***

Will

smith

National Producer Number

(423) 432-2342

Alternate Phone

Email ID

User Name

Password

ReTypePassword

FFM User Name

FFM Password

**Password Security Questions \***

Question 1

Answer1

Question 2

Answer2

Question 3

Answer3

☐ I have reviewed and accepted the conditions of this [User Agreement](#).

Cancel

Save

Figure 5: Agent Registration

Field	Mandatory	Description
First Name	Yes	Specify the first name of the employee. Name should not exceed 50 characters. If the input first name contains any special characters except hyphens and apostrophes and numbers other than alphabets, the application displays the error message: "First name can only contain letters"
Last Name	Yes	Specify the last name of the employee. Name should not exceed 50 characters. If the input last name contains any special characters except hyphens and apostrophes and numbers other than alphabets, the application displays the error message: "Last name can only contain letters"
National Producer Number	Yes	Specify the NPN, The National Producer Number is a unique NAIC identifier assigned through the licensing application process or the NAIC reporting systems to individuals and business entities (including, but not limited to producers, adjusters, and navigators) engaged in insurance related activities regulated by a state insurance department.
Phone	Yes	Specify the valid Phone number
Alternate Phone	No	Specify the valid Alternate Phone number
User Name	Yes	Specify a new user name
Password	Yes	Create a new password , The password must be 6-12 characters with combination of alphabets and/or numbers
Retype Password	Yes	Re type the same password which you typed in the Password filed
FFM User Name	No	Specify the FFM username
FFM Password	No	Specify the password
Password Security Questions	Yes	<p>Select one of the following security questions from the drop down menu. And Answer the security questions respectively:</p> <ol style="list-style-type: none"> <li>1. What is the name of your favorite childhood friend?</li> <li>2. In which city you were born?</li> <li>3. What is your mom's maiden name?</li> <li>4. What was your first pet's name?</li> </ol>

Field	Mandatory	Description
5. What is your best friend's name?		
Note - There are three security questions which needs to be answered for password security purpose.		
Email	Yes	Specify the valid email id
Save	No	Click the <b>Save</b> button to save the new contact
Cancel	No	Click the <b>Cancel</b> button to cancel adding new contact

Click the check box adjacent to the statement “I have reviewed and accepted the conditions of this User Agreement.” And click the Save button.

**Note:** Agent cannot proceed without checking this check box.

## 8 Customer

Customer tab will help agents to add/edit and view the Individual customer details in his profile.

Agents can export the customer details in the excel format for e.g. Customer ID, First name, last name, email id, phone number, Quote counts etc.

### How to Add Customer?

- 8.1 Refer to **Figure 6: Add Customers**.
- 8.2 Click the Customer tab in your profile.
- 8.3 Click the **Add Customer** button in the 'Individual customers' page.
- 8.4 Fill the required fields with the customer details.

Dashboard

Notifications

Agency Details

Agency Contacts

Agent Associations

Customer

Quotes

Applications

Carrier Appointments

User Carrier Appointments

Report

Individual Customers

Search...

Q

Advance Search

Add Customer

Export

First Name\*

Middle Name

Last Name\*

Prefix

Suffix

Gender\*

Male

Female

Date of Birth\*

MM/DD/YYYY

Home Address (Do not use PO box numbers)

Address Line 1

Address Line 2

Zip

City

State

Is Mailing address same as Home address?

Address Line 1

Address Line 2

Zip

City

State

Figure 6: Add Customers

The screenshot displays a web form for managing contact information and dependents. The 'Contact Information' section includes fields for Phone, Alternate Phone, and Email, each marked with a red asterisk. A '+ Add Dependents' button is located to the right. The 'Dependents' section contains a grid of fields: Dependent Type (dropdown), First Name (text, red asterisk), Last Name (text, red asterisk), Middle Name (text), Prefix (dropdown), Suffix (dropdown), Date of Birth (text with MM/DD/YYYY placeholder, red asterisk), and Gender (radio buttons for Male and Female, red asterisk). A 'Remove' button is positioned below the fields. At the bottom right are 'Cancel' and 'Save' buttons.

Field	Mandatory	Description
First Name	Yes	Specify the first name of the customer. Name should not exceed 50 characters. If the input first name contains any special characters except hyphens and apostrophes and numbers other than alphabets, the application displays the error message: "First name can only contain letters"
Middle Name	No	Specify the middle name of the customer. Name should not exceed 50 characters. If the input first name contains any special characters except hyphens and apostrophes and numbers other than alphabets, the application displays the error message: "First name can only contain letters"
Last Name	Yes	Specify the last name of the customer. Name should not exceed 50 characters. If the input last name contains any special characters except hyphens and apostrophes and numbers other than alphabets, the application displays the error message: "Last name can only contain letters"
Prefix	No	Select the applicable Prefix from the drop-down menu. (1. Miss., 2. Mr., 3. Ms., 4. Mrs., 5.Dr.)
Suffix	No	Select the applicable Suffice from the drop-down menu. (1.Jr, 2.Sr, 3. I, 4. II, 5. III, 6. IV)

Field	Mandatory	Description
Gender	Yes	Select the applicable Gender (Male or Female)
Date of Birth	Yes	Click the DOB field and Select the applicable date of birth from the calendar.
<b>Home Address (Do not use PO box numbers)</b>		
Address Line 1	Yes	Specify the correct address in this field, You can specify up to 50 characters in this field
Address Line 2	No	Use this field in case the address is more than 50 characters.
Zip	Yes	Specify the correct zip code in this field (5 digits),
City	Yes	Application will automatically fill this field when you type the ZIP code
State	Yes	Application will automatically fill this field when you type the ZIP code
Is Mailing address same as Home address?	No	If your Mailing address is same as Home address then click the check box. If not then fill the mailing address separately.
<b>Contact Information</b>		
Phone	Yes	Specify the valid Phone number.
Alternate Phone	No	Specify the valid Alternate Phone number.
Email	Yes	Specify the customers email id in this field.
<b>Add Dependents</b>		
Dependent Type	Yes	Select one of the dependent types from the drop down menu (1. Spouse or 2. Dependent)
First Name	Yes	Specify the first name of the customer. Name should not exceed 50 characters. If the input first name contains any special characters except hyphens and apostrophes and numbers other than alphabets, the application displays the error message: "First name can only contain letters"



Field	Mandatory	Description
Middle Name	No	Specify the middle name of the customer. Name should not exceed 50 characters. If the input first name contains any special characters except hyphens and apostrophes and numbers other than alphabets, the application displays the error message: "First name can only contain letters"
Last Name	Yes	Specify the last name of the customer. Name should not exceed 50 characters. If the input last name contains any special characters except hyphens and apostrophes and numbers other than alphabets, the application displays the error message: "Last name can only contain letters"
Prefix	No	Select the applicable Prefix from the drop-down menu. (1. Miss., 2. Mr., 3. Ms., 4. Mrs., 5.Dr.)
Suffix	No	Select the applicable Suffice from the drop-down menu. (1.Jr, 2.Sr, 3. I, 4. II, 5. III, 6. IV)
Remove	No	If you want to delete the added dependents, then click the <b>Remove</b> button.
Save	No	Click the <b>Save</b> button to save the customer details
Cancel	No	Click the <b>Cancel</b> button to cancel the operation.

## View Customer Details

The application allows the agents to view/edit the added customer details.

The screenshot displays the 'Individual Customers' section of a web application. On the left is a sidebar menu with options: Dashboard, Notifications, Agency Details, Agency Contacts, Agent Associations, Customer (highlighted in red), Quotes, Applications, Carrier Appointments, User Carrier Appointments, and Report. The main content area is titled 'Individual Customers' and features a search bar, an 'Advance Search' button, and buttons for 'Add Customer' and 'Export'. Below this is a table with the following columns: Customer Name, ID, Email ID, Contact no, and Status. A single row is visible with the data: jaden smith, 40209, [redacted], (545) 323-2738, and Prospect (indicated by a green dot). To the right of the row is a 'View Details' button, which is highlighted by a black dot and a callout line with a blue circle containing the number '1'. At the bottom of the table area, there is a 'List Per Page' dropdown set to '10' and pagination controls showing '1 - 1 of 1' with left and right arrow buttons.

Customer Name	ID	Email ID	Contact no	Status
jaden smith	40209	[redacted]	(545) 323-2738	Prospect

- 1 - Click the **View Details** button to edit/view the details of the existing customers.

## 8.5 View Details

In the view details page, you can edit the customer details, you can quote, upload documents, census and see the payment history.

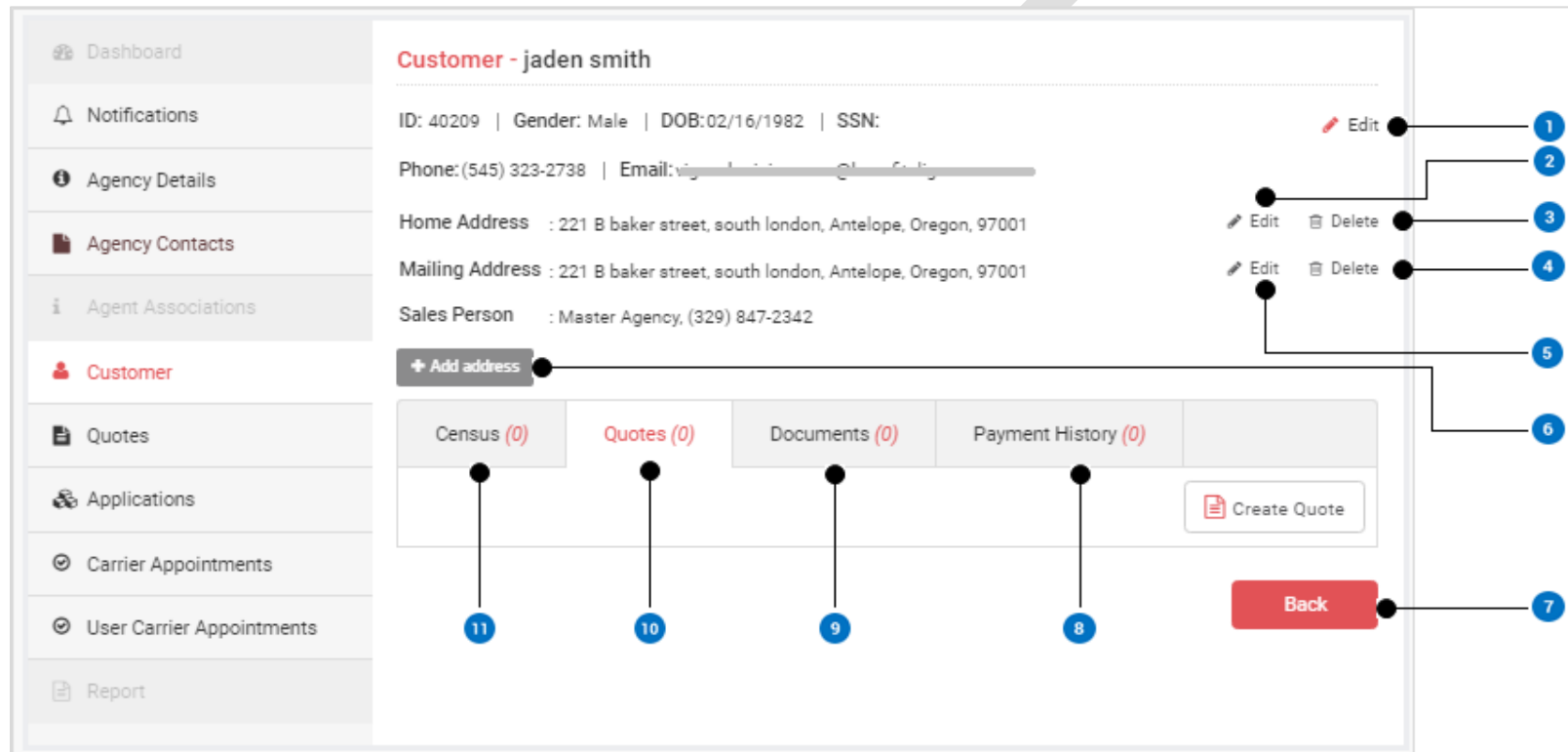
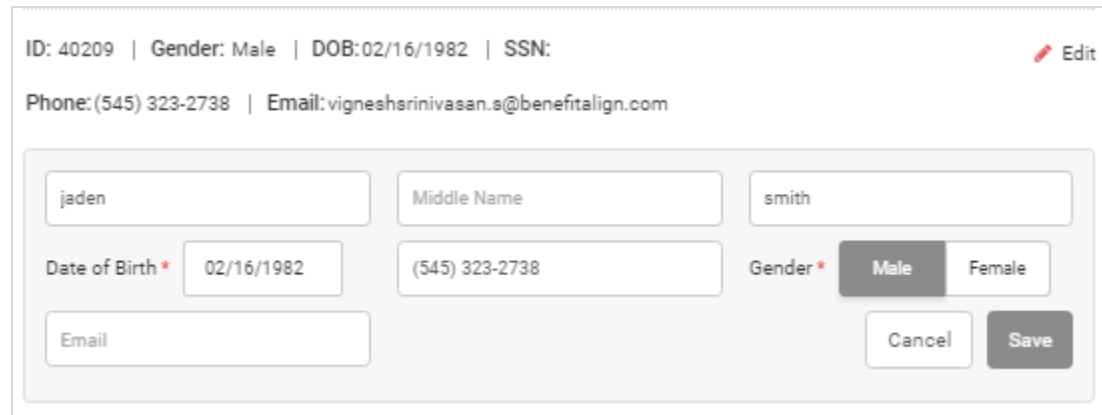


Figure 7 : View Customer Details

- 1 - Click the **Edit** button and edit the personal information of the customers. Refer to Figure 7: View Customer Details



ID: 40209 | Gender: Male | DOB: 02/16/1982 | SSN: Edit

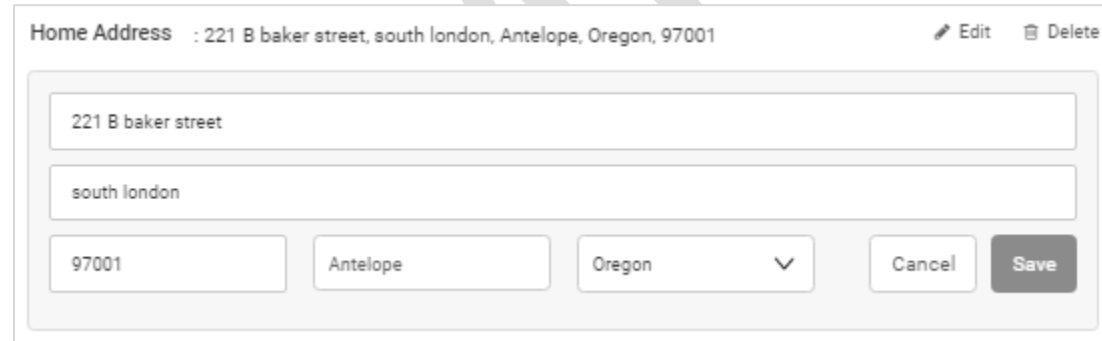
Phone: (545) 323-2738 | Email: vigneshsrinivasan.s@benefitalign.com

First Name: jaden Middle Name: Last Name: smith

Date of Birth \* 02/16/1982 Phone (545) 323-2738 Gender \* ☒ Male ☐ Female

Email: Cancel Save

- 2 - Click the **Edit** button to edit the Home address. Refer to Figure 7: View Customer Details



Home Address : 221 B baker street, south london, Antelope, Oregon, 97001 Edit Delete

221 B baker street

south london

97001 Antelope Oregon Cancel Save

- 3 - Click the **Delete** button to delete the **Home Address**.
- 4 - Click the **Delete** button to delete the **Mailing Address**.
- 5 - Click the **Edit** button to edit the Mailing Address.

Mailing Address : 221 B baker street, south london, Antelope, Oregon, 97001 Edit Delete

221 B baker street

south london

97001

Antelope

Oregon

▼

Cancel

Save

- 6 - Click the **Add Address** button to add any of the following Address types:
    - Home Address
    - Mailing Address
    - Billing Address
1. After clicking the add address button Address Fields will be shown.
  2. Click the Address type and select one of the address type from the drop down menu.
  3. Fill the remaining address field, refer to

+ Add address

Address Type

▼

Address Line 1

Address Line 2

Zip

City

State

▼

Cancel

Save

Address Type ▼

Address Type

Home

Mailing

Billing

- 7 - Click the **Back** button to go back to the previous page.
- 8 - Click the **Payment History** tab to view the customer's payment history.
  - Click the **Print** button in the action column to take the printable copy of the payment history.
  - You can find the Payment ID, Quote ID in the payment history tab.

Census (1)	Quotes (1)	Documents (0)	Payment History (1)			
Payment ID	Quote ID	Plan Name	Total Due	Balance	Status	Action
6663	52400	Providence Oregon Standard Bronze Plan	\$0.05	\$0.00	Accepted	<a href="#">Print</a>

- 9 - **Documents**

Census (0) Quotes (0) Documents (0) Payment History (0)

Add Documents

Document Type \* Comments Browse \*

Document Type

- Arrival/Departure Record in foreign passport(I-94)
- Employee Authorization Card(EAD,I-776)
- Other documents or status types
- Temporary I-551 Stamp(on passport or I-94,I-94A)
- Arrival/Departure Record(I-94,I-94A)
- Foreign Passport
- Permanent Resident Card(Green Card,I-551)
- Certificate of Eligibility for Exchange Visitor(J-1) Status(DS2019)
- Machine Readable Immigrant Visa(with temporary I-551 language)
- Reentry Permit(I-327)
- Certificate of Eligibility for Nonimmigrant(F-1)Student Status(I-20)
- Notice of Action(I-797)
- Refugee Travel Document(I-571)

Cancel Save

Back

1. Click the **Documents** button to view the submitted documents or to submit a document.
2. Click the **Add Documents** button to add a new documents.
3. Select one of the following document types from the drop down menu:
  - Arrival/Departure Record in foreign passport (I-94)
  - Employee Authorization Card (EAD, I-776)
  - Other documents or status types
  - Temporary I-551 Stamp (on passport or I-94, I-94A)
  - Arrival/Departure Record (I-94, I-94A)
  - Foreign Passport
  - Permanent Resident card (Green Card, I-551)
  - Certificate of Eligibility for Exchange Visitor (J-1) Status (DS2019)
  - Machine Readable Immigrant Visa (with temporary I-551 language)
  - Reentry Permit (I-327)

- Certificate of Eligibility for Nonimmigrant (F-1) Student Status (I-20)
  - Notice of Action (I-797)
  - Refugee Travel Document (I-571)
4. Click the **Comment** field, and give the comments about the documents you have uploaded.
  5. Click the **Browse** field and select the applicable document from your system.
  6. Click the **Save** button to save the document.
  7. Click the **cancel** button to cancel the operation.



## 10 - Quotes

Application allows the Agents to create or customize the quote for the customers.

The screenshot displays a web interface for a health plan quote. At the top, there are tabs for 'Census (1)', 'Quotes (1)', 'Documents (0)', and 'Payment History (1)'. Below the tabs, the quote details are shown: 'Quote ID: 52400 | Created Date: 03/07/2017' and a status of 'In Progress' (callout 1). The plan name is 'Providence Oregon Standard Bronze Plan' with an effective date of '04/01/2017'. A table lists plan details: Max OOP (\$7,150/\$14,300, callout 6), Deductible (\$7,150/\$14,300, callout 5), and PCP Cost Share (\$70, callout 4). The Monthly Premium is \$0.05, with an original rate of \$531.00. A 'Decline Quote' button is present (callout 2). Below this, a 'Covered Members' section lists the Applicant (Will Smith, 03/13/1985, Male) and Spouse (Jada smith, 03/18/1986, Female). A 'TAX CREDIT ELIGIBLE' badge and a 'More Details' link (callout 3) are also visible. At the bottom, there are buttons for 'Email proposal' (callout 10), 'Regenerate proposal' (callout 9), 'Download proposal' (callout 8), and 'Continue' (callout 7). A 'Create Quote' button (callout 11) is located at the bottom right.

Figure 8 : How to create quotes?

- 1 - Click the **In progress** to view the Quote details.
- 2 - Agents can **Decline Quote** by clicking this icon.
- 3 - Click **More Details** button see the summary of benefits about the plan you have selected.

- 4 - Click the **AOR** tab to know the records of agent .i.e. Agent Name, Phone and Email. You can edit the records of agent by clicking the edit button.

Covered Members	FFM Details	<b>AOR</b>	<b>TAX CREDIT ELIGIBLE</b> More Details
<p>▶ <b>Name</b> : Master Agency <span>Edit</span></p> <p>▶ <b>Phone</b> : (329) 847-2342</p> <p>▶ <b>Email</b> : <a href="mailto:sigmarhennings@benefitall.com">sigmarhennings@benefitall.com</a></p>			

- 5 - Click the FFM details tab to know the FFM user name and password.
- 6 - Click the Covered members tab to know about the applicants and dependents name who are covered in this application.
- 7 - Click the **Continue** button to continue the application to enrollment.
- 8 - Click the **Download Proposal** button to download the proposal in pdf Format.
- 9 - Click the **Regenerate Proposal** button to regenerate the proposal in case any changes has been made.
- 10 - Click the **Email Proposal** button, enter the email address in the email id field and message in the message field if any. Click the **Send** button.
- 11 - Click the **Create Quote** button to create quotes for customer. Refer the **User Guide for Anonymous Users** to finish the quoting.

Note: Make sure that the carrier mapping has done before quoting, refer to.

After clicking the begin enrollment in the cart page, the **Enrollment Steps** page will load.

## 9 Enrollment Steps

### 1.1 Application Information

1.1.1 Agent can edit the Applicant and Spouse/Dependents details.

The screenshot displays the 'Your Household' section of an enrollment application. On the left is a sidebar with 'Enrollment Steps (Application Checklist)' containing links for 'Application Information', 'Health', 'Summary', 'Payment', and 'Confirmation'. The main area is titled 'Your Household' and shows 'Applicant Details' for the 'Providence Oregon Standard Bronze Plan'. The 'Applicant' section includes fields for First Name (Will), Middle Name, Last Name (Smith), Prefix, Suffix, SSN (XXX-XX-3456), Gender (Male), Date of Birth (03/13/1985), and Tobacco Usage (No). The 'Spouse' section includes fields for First Name (Jada), Middle Name, Last Name (smith), Prefix, Suffix, SSN, Gender (Female), Date of Birth (03/18/1986), and Tobacco Usage (No). Red asterisks indicate mandatory fields.

Field	Mandatory	Description
First Name	Yes	Specify the first name of the customer. Name should not exceed 50 characters. If the input first name contains any special characters except hyphens and apostrophes and numbers other than alphabets, the application displays the error message: "First name can only contain letters".
Middle Name	No	Specify the middle name of the customer. Name should not exceed 50 characters. If the input first name contains any special characters except hyphens and apostrophes and numbers other than alphabets, the application displays the error message: "First name can only contain letters".
Last Name	Yes	Specify the last name of the customer. Name should not exceed 50 characters. If the input last name contains any special characters except hyphens and apostrophes and numbers other than alphabets, the application displays the error message: "Last name can only contain letters".

Field	Mandatory	Description
Prefix	No	Select the applicable Prefix from the drop-down menu. (1. Miss., 2. Mr., 3. Ms., 4. Mrs., 5.Dr.).
Suffix	No	Select the applicable Suffice from the drop-down menu. (1.Jr, 2.Sr, 3. I, 4. II, 5. III, 6. IV).
SSN	Yes	Specify the Social Security Number (SSN) which is a 9 digit number.

#### 1.1.2 Contact information :

**Contact Information**

(546) 708-8987

+

(876) 543-2323

Email Address

- 1 - Click the Phone icon to add alternate phone number of the applicant.
- 2 - Click the Bin icon to delete the alternate phone numbers of the applicant.
- 3 - Edit/Update the email address

1.1.3 Agents can update the home address and the mailing address.

Home Address (Do not use PO box numbers)

221 B Baker street

Address Line 2

Antelope, Wasco, Oregon 97001

Is Mailing address same as Home address?

Yes

No

Mailing Address

221 B Baker street

Address Line 2

97001

Antelope

Oregon



#### 1.1.4 Additional Information

- Agents can add applicant's physician name and PCP number.

**Additional Information**

Primary Care Physician

Physician Name

PCP No.

---

#### 1.1.5 Special Enrollment Period

- If the enrollment is out of open enrollment period, then applicant has to provide the special enrollment event. Click the Yes button, if there is no special enrollment event, then click No button.
- Click the **Yes** button if all the applicants are United States citizens or nationals else click the **No** button.

**Special Enrollment Period**

Do you have any Special Enrollment Event?

Yes

No

Are all applicants United States citizens or nationals ? \*

Yes

No

- 1.1.6 Click the **Next** button to proceed the enrollment steps.
- 1.1.7 Click the **Save and Finish Later** button to save the enrollment and finish the enrollment later.
- 1.1.8 Click the **Cancel** button to cancel the enrollment.



---

1.1.9 Enrollment questions

1.1.10 Answer the following circumstantial questions which is applicable to applicants:

- Are any of the applicants Pregnant?
- Are any of the applicants American Indian or Alaska Native?
- Are any of the applicants of Hispanic, Latino or Spanish origin?
- Do any of the applicants have a physical disability or mental health condition that limits your ability to work, attend school, or take care of daily needs?
- Where any of the applicants found not eligible for Medicaid and Children's Health Insurance Program (CHIP) since 11/15/2014?
- Are any of the applicants currently eligible for health coverage through a job (even if it's through COBRA or from another person's job, like spouse)?
- Will any of the applicants be eligible for health coverage from a job in 2017(even if it's through COBRA or from another person's job, like spouse)?

1.1.11 Answer the following tax questions which is applicable to the applicants:

- Does Will Smith plan to file a federal income tax return for 2017?

If yes, then select Yes or No option from the drop down menu if the applicant has filed Federal Income Tax returns and also select **Yes** or **No** if the applicant is married.

## Tax Questions

Does **Will Smith** plan to file a federal income tax return for 2017?

Yes

No

Will Smith	File Federal Income Tax Return Yes	Married Yes
Jada smith	File Federal Income Tax Return No	Married Yes

- Does applicant plan to file a joint federal income tax return with his/her spouse for 2017?
- Will applicant be claimed as a dependent on someone else's tax return for 2017?


1.1.12 Answer the following additional questions which is applicable to the applicants:

- Does applicant live with a son, daughter, stepson or stepdaughter?
- Does applicant live with one or more children under age 19 and is applicant the main person taking care of that child or children?
- Do any of the applicants have other health coverage?




### 1.1.13 Income and Deductions

Specify the Income for each applicant, if any \* Plan Name: Providence Oregon Standard Bronze Plan

Applicant Name ▾	Income Type ▾	Frequency ▾	\$			5
1	2	3	4			

Specify the Deduction for each applicant, if any

Will Smith ▾	Deduction Type ▾	Frequency ▾	\$			7
12	11	10	9			

6

8

Agents has to specify the Income for each applicant, if any.

1 - Applicant Name

Select the applicant name from the drop down list.

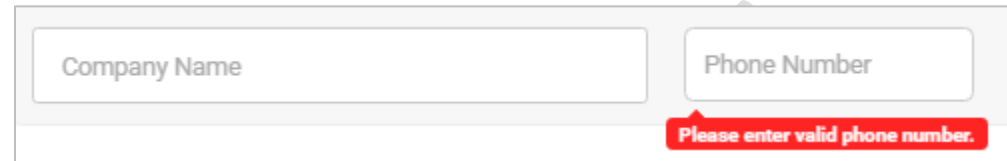
2 - Deduction Type

Select one of the following applicable deduction type:

- Job
- Retirement
- Rental or royalty income
- Self – employment
- Pension
- Farming or fishing income
- Social Security benefits
- Capital gains
- Alimony received
- Unemployment

- Investment income
- Other income

Note: When agent selects the deduction type as **JOB** application will ask you to provide the **Company Name** and **Phone number**.



The image shows a form with two input fields: 'Company Name' and 'Phone Number'. The 'Phone Number' field is highlighted with a red border and a red error message that says 'Please enter valid phone number.'.

3 - Frequency:

Specify the frequency of your income from the drop down menu (Monthly or yearly).

4 - Income amount:

Specify the income amount of the applicant in numbers

5 - Click the **Bin** icon to delete the applicant income details

6 - Click the **Add** icon to add the applicant's income details.

7 - Click the **Bin** icon to delete the deduction details.

8 - Click the **Add** icon to add the applicant's deduction details.

9 - Deduction amount:

Specify the deduction amount of the applicant in numbers

10 - Frequency:

Specify the frequency of applicant's deduction from the drop down menu (Monthly or yearly).

11 - Deduction type:

Select one of the deduction types that follows from the drop down menu.

- Alimony
- Students loan interest
- Others

- 12 - Applicants name:  
Select the applicant's name from the drop down list.

- 1.1.14 Click the **Next** button to proceed the enrollment steps.
- 1.1.15 Click the **Save and Finish Later** button to save the enrollment and finish the enrollment later.
- 1.1.16 Click the **Cancel** button to cancel the enrollment.
- 1.1.17 Click the **Previous** button to go back to the previous page.

## 1.2 Summary Page

Application will show the health plan, applicants have selected and it will ask the agents for the confirmation and authorization to enroll the application on behalf of the applicants.

Health plan you have selected [Edit](#)

	Providence Oregon Standard Bronze Plan	Effective Date 04/01/2017	<b>TAX CREDIT ELIGIBLE</b> Monthly Premium <b>\$0.05</b>
Covered Members: Applicant   Spouse			<a href="#">More Details</a> <a href="#">Terms &amp; Conditions</a>

☒ I, **Master Agency** have been given verbal or written authorization by the applicants to process this online enrolment which includes providing their billing information to be used for this purchase. If in the future the applicants should claim that an authorization was not given, I will provide proof of such authorization and/or take responsibility for processing this enrolment.


[ 03/08/2017 03:55 AM - NAXG7V1R ]

[Cancel](#) [Save and Finish later](#) [Next](#)

- 1.2.1 Click the **Check box** against the authorization statement.
- 1.2.2 Click the **Next** button to proceed the enrollment steps.
- 1.2.3 Click the **Save and Finish Later** button to save the enrollment and finish the enrollment later.
- 1.2.4 Click the **Cancel** button to cancel the enrollment.

### 1.3 Payment

#### Payment

	Plan Name	Providence Oregon Standard Bronze Plan	Monthly Premium <b>\$0.05</b>
	Carrier	Providence Health Plan	
PAYMENT METHOD	<input checked="" type="radio"/> CREDIT CARD <input type="radio"/> EFT <input type="radio"/> PAY LATER		

Sub Total: **\$0.05**  
First month Premium Amount

Previous Save and Finish later Cancel Next

Application will provide the payment options that follow:

- Credit Card
- EFT
- Pay Later

1.3.1 Select the applicable payment options that mentioned above.

1.3.2 Click the **Next** button.

## Payment by Credit card

If agent selected the payment by credit card, he has to full the following details.

**Enrollment Steps**  
(Application Checklist)

- Application Information
- Health
- Summary
- Payment**
- Confirmation

**Payment**

How would you like to pay for this coverage?

Sub Total: **\$0.05**  
First month Premium Amount

**Selected Plans:** Providence Oregon Standard Bronze Plan (Providence Health Plan)

By Credit Card

1 Credit Card \* 2 Expiry Date MM/YYYY 3 CVV \* 4 Account Holder Name \* Pay: \$0.05

Is billing address same as home address? Yes No 5

**Billing Address**

Address Line 1 \*

Address Line 2 (optional)

Zip Code \* City State

Process Payment By MM/DD/YYYY 6

⚠ Your recurring payments will be by this payment method.

Your Notes Notes 7

Previous Save and Finish later Cancel Checkout

- 1 - The card number is usually located in front of the card, the card contains sixteen digit credit card number.

- 2 - The expiry date will be mentioned in front of the card with month and year mentioned in this format (MM/YY).
- 3 - The CVV number will be mentioned at the back of the card. The CVV Number ("Card Verification Value") on your credit card or debit card is a 3 digit number on VISA®, MasterCard® and Discover® branded credit and debit cards. On your American Express® branded credit or debit card it is a 4 digit numeric code.
- 4 - The Account holders name will be usually located in front of the card, if not please ask the applicants to provide the account holders name.
- 5 - Is the billing address is same as home address, if yes, click the **Yes** option in the toggle button, else click the No option in the toggle button.  
  
When you click **No** button the application will ask you to provide the billing address.
- 6 - Process Payment By – Agents can mention the date of the payment to be processed on every month.
- 7 - Notes – Agents can add a notes to the payment in the notes field.

1.3.3 Click the **Check out** to complete the payment.

1.3.4 Click the **Next** button to proceed the enrollment steps.

1.3.5 Click the **Save and Finish Later** button to save the enrollment and finish the enrollment later.

1.3.6 Click the **Cancel** button to cancel the enrollment.

## Payment by EFT

Agents can opt for EFT (Electronic Fund Transfer) for payment.

**Payment**

How would you like to pay for this coverage?

Sub Total: **\$0.05**  
First month Premium Amount

**Selected Plans:** Providence Oregon Standard Bronze Plan (Providence Health Plan)

By Electronic Funds Transfer Pay: \$0.05

1  \*

2  \*

3  \*

8  \*

\*

4  \*

Process Payment By

5

6

7

Your recurring payments will be by this payment method.

Previous Save and Finish later Cancel Checkout

- 1 - Specify the bank name in which you have the account.
- 2 - Specify the Account holder Name.
- 3 - Specify the Bank Account Number.
- 4 - Select the draft day from the drop down menu.



- 5 - Specify the Routing number in this field. Bank routing number or routing transit number (RTN) is a nine digit number used to identify a financial institution in a transaction.
- 6 - Click the Payment process by field and select the applicable date in which you wish to have your payment here by.
- 7 - Specify additional information about your payments in the **Notes** field.
- 8 - Select the applicable account type from the drop down menu.

1.3.7 Click the **Check out** to complete the payment.

1.3.8 Click the **Next** button to proceed the enrollment steps.

1.3.9 Click the **Save and Finish Later** button to save the enrollment and finish the enrollment later.

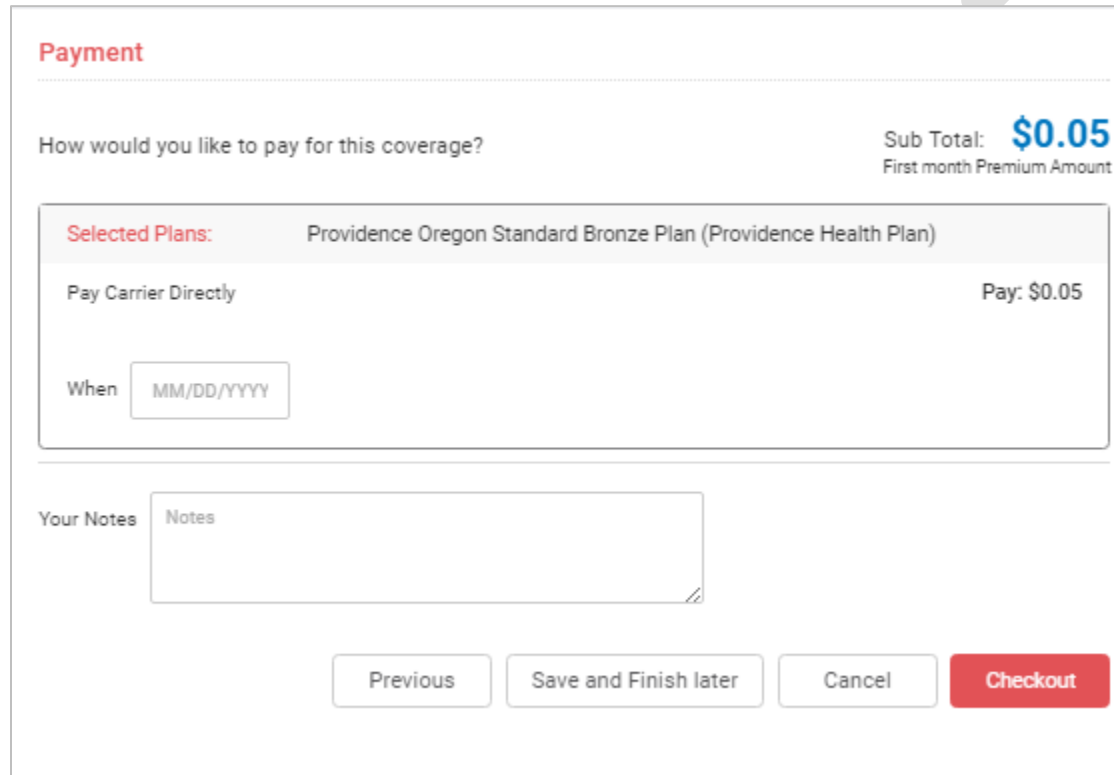
1.3.10 Click the **Cancel** button to cancel the enrollment.

## Payment by PAY LATER

Agents can use the pay later option to pay the carrier directly.

Agents can mention the date of direct payment in the application.

Agents can mention additional information about the payment in the **Your Notes** field.



The screenshot shows a 'Payment' form with the following elements:

- Payment** (Section Header)
- How would you like to pay for this coverage?
- Sub Total: **\$0.05**  
First month Premium Amount
- Selected Plans:** Providence Oregon Standard Bronze Plan (Providence Health Plan)
- Pay Carrier Directly** (Selected Option) Pay: \$0.05
- When:
- Your Notes:
- Buttons: Previous, Save and Finish later, Cancel, Checkout

1.3.11 Click the **Check out** to complete the payment.

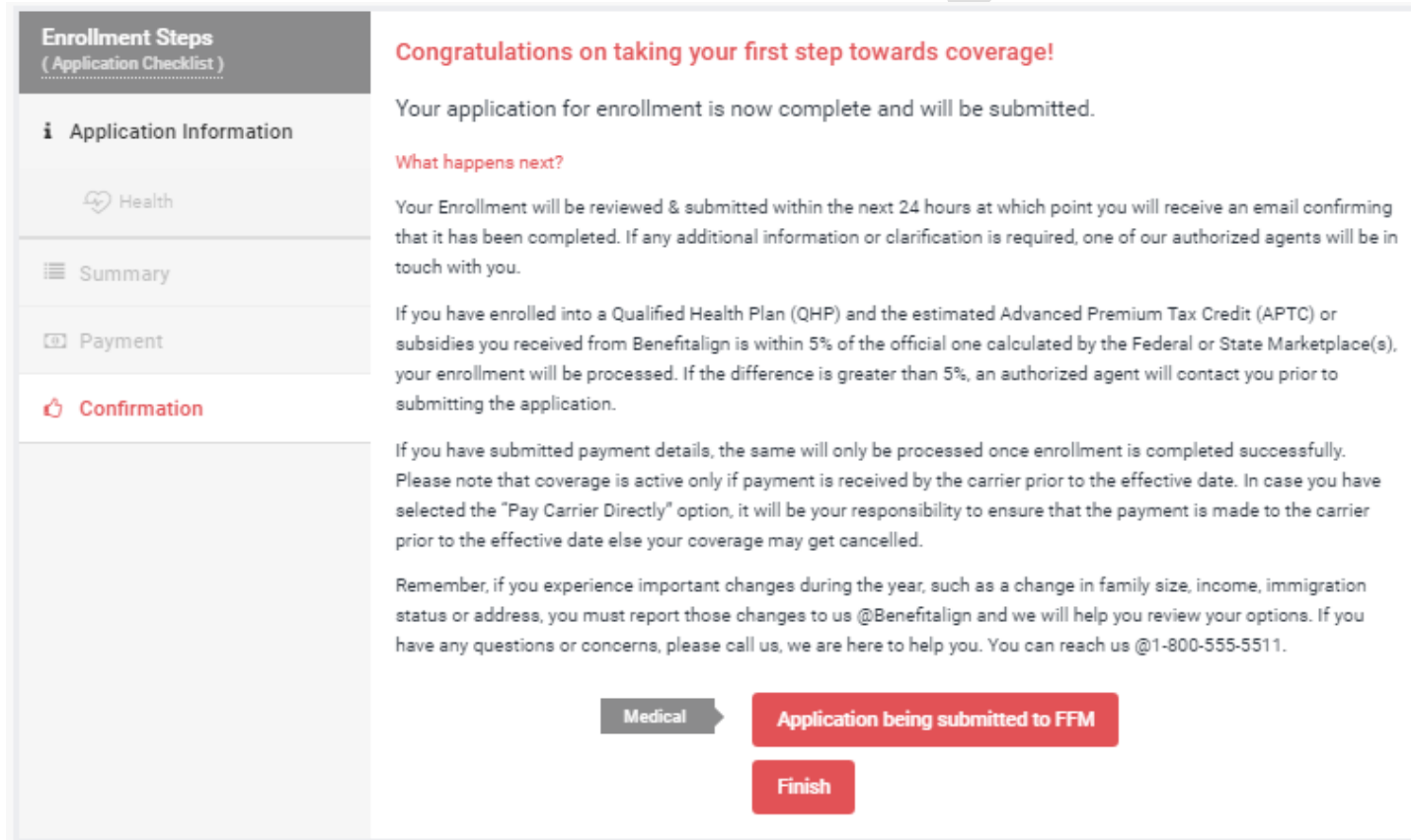
1.3.12 Click the **Next** button to proceed the enrollment steps.

1.3.13 Click the **Save and Finish Later** button to save the enrollment and finish the enrollment later.

1.3.14 Click the **Cancel** button to cancel the enrollment.

## 1.4 Confirmation

- Application will show the enrollment confirmation message after the enrollment is complete and submitted to FFM for eligibility check.
- Application will display the information about what happens after submitting the application to FFM.
- Click the **Finish** button to go back to the agent's profile.



**Enrollment Steps**  
( Application Checklist )

**i Application Information**

Health

Summary

Payment

**Confirmation**

**Congratulations on taking your first step towards coverage!**

Your application for enrollment is now complete and will be submitted.

**What happens next?**

Your Enrollment will be reviewed & submitted within the next 24 hours at which point you will receive an email confirming that it has been completed. If any additional information or clarification is required, one of our authorized agents will be in touch with you.

If you have enrolled into a Qualified Health Plan (QHP) and the estimated Advanced Premium Tax Credit (APTC) or subsidies you received from Benefitalign is within 5% of the official one calculated by the Federal or State Marketplace(s), your enrollment will be processed. If the difference is greater than 5%, an authorized agent will contact you prior to submitting the application.

If you have submitted payment details, the same will only be processed once enrollment is completed successfully. Please note that coverage is active only if payment is received by the carrier prior to the effective date. In case you have selected the "Pay Carrier Directly" option, it will be your responsibility to ensure that the payment is made to the carrier prior to the effective date else your coverage may get cancelled.

Remember, if you experience important changes during the year, such as a change in family size, income, immigration status or address, you must report those changes to us @Benefitalign and we will help you review your options. If you have any questions or concerns, please call us, we are here to help you. You can reach us @1-800-555-5511.

Medical → Application being submitted to FFM

Finish

## 10 Quotes

Agents can search the registered customers and also they can enroll, decline the quotes and edit customer details.

The screenshot shows the 'Individual Quotes' interface. It includes a search bar (1), an 'Advance Search' button (2), a form with various filters like Customer First/Last Name, Quote ID, Status, Exchange Plan, Agent Name, Email Id, EffectiveDate, and Anonymous Quote. Below the form is a table with columns: Customer Name, Quote ID, Created Date, Status, Action, and Details. The table lists two quotes: 'Wally west' (Created) and 'Dexter D' (Cancelled). Callout 3 points to the 'Details' column header, and callout 4 points to the 'Plans (1)' dropdown in the first row.

**Individual Quotes**

Search  **Advance Search**

Customer FirstName Customer LastName Line Of Business


Quote ID Quote Status FFM Status

Exchange Plan Agent Name Email Id

EffectiveDate From MM/DD/YYYY EffectiveDate To MM/DD/YYYY Created By

Anonymous Quote

Customer Name	Quote ID	Created Date	Status	Action	Details
Wally west	52525	03/13/2017	Created	<input type="button" value="✓ Continue"/>	Plans (1) <input type="button" value="v"/>
Dexter D	52454	03/09/2017	Cancelled	<input type="button" value="✓ Apply"/>	Plans (1) <input type="button" value="v"/>

- 1 - Click the search filed and enter the customer's name and click the magnifying glass  icon to initiate the search for customer details.
- 2 - Click the Advanced search field and use the applicable below mentioned fields to narrow down the search results.

Field	Description
Customer First Name	Specify the first name of the customer. Name should not exceed 50 characters. If the input first name contains any special characters except hyphens and apostrophes and numbers other than alphabets, the application displays the error message: "First name can only contain letters".
Customer Last Name	Specify the last name of the customer. Name should not exceed 50 characters. If the input last name contains any special characters except hyphens and apostrophes and numbers other than alphabets, the application displays the error message: "Last name can only contain letters".
Line of Business	Select one of the following applicable Line of business from the advanced search: <ul style="list-style-type: none"><li>• Medical</li><li>• Dental</li><li>• Vision</li><li>• Term Life</li><li>• Dental, Vision and Hearing</li><li>• Out of Pocket Protection</li><li>• Term Life with Critical illness</li><li>• Supplemental Health</li><li>• Accidental Insurance</li><li>• Short Term Medical</li><li>• Final Expanse</li></ul>
Quote ID	Specify the quote id which was created at the time of the creating quotes
Quote Status	Select one of the applicable below mentioned quote status: <ul style="list-style-type: none"><li>• Created</li><li>• In Progress</li><li>• Install In Progress</li><li>• Installed</li><li>• Inactive</li><li>• Terminated</li></ul>
FFM Status	Select one of the applicable below mentioned FFM status:

Field	Description
	<ul style="list-style-type: none"> <li>• Pending</li> <li>• Locked-Eligibility</li> <li>• Submitted</li> <li>• Locked-Enrollment</li> <li>• Enrolled</li> <li>• Enrolled-Pay Later</li> <li>• Locked Payment</li> <li>• Premium Paid</li> <li>• Need More Information.</li> </ul>
Exchange Plan	Select 'Yes' from the drop down if the plan is exchange plan, else select 'No'.
Agent Name	Specify the Agent's Name in the field.
Email Id	Specify the registered customer's email id.
Effective Date From	Specify the " <b>Effective Date From</b> " by clicking calendar field.
Effective Date To	Specify the " <b>Effective Date From</b> " by clicking calendar field.
Created By	Specify the name of the agent or agency admin who created the quotes.
Anonymous Quote	Specify 'Yes' from the drop down if the plan is Anonymous Quote, else select 'No'.
Search	Click the <b>Search</b> button to initiate the search.
Cancel	Click the <b>Cancel</b> button to abort the search.

3 - You can see the search results in this row.

4 - Click the drop down 'V' icon to view the customer details and the plan details. For more information refer to .

## 11 Applications

In the application tab agents can view the status of the application and view the application details.

Agents can sort the result ascending or descending by clicking the '↕' icon.

The screenshot shows the 'Applications' tab interface. At the top left, the word 'Applications' is in red. Below it is a search bar with a magnifying glass icon (callout 1) and a dropdown menu currently set to 'All' (callout 2). To the right of the dropdown is an 'Advance Search' button (callout 3). Below these elements is a table with 12 columns: Agency, Agent, Exchange, LOB-Effective Date, State (with a sort icon), Applicant Name, Customer Name, Quote Status, App ID, Created Date (with a sort icon), Queue Status (with a sort icon), and Details. The table contains two data rows. The first row shows a cancelled application for Dexter D. The second row shows an in-progress application for Will Smith. In the 'Details' column of the second row, there is a 'Click here' link (callout 4).

Agency	Agent	Exchange	LOB-Effective Date	↕ State	Applicant Name	Customer Name	Quote Status	App ID	↕ Created Date	↕ Queue Status	Details
MasterAgency	Master Agency	On	Health-04/01/2017	Oregon	Dexter D	Dexter D	CANCELLED	5726	03/09/2017	In Progress	
MasterAgency	Master Agency	On	Health-04/01/2017	Oregon	Will Smith	Will Smith	In Progress	5718	03/07/2017	Pending	Click here

- 1 - Click the search filed and enter the customer's name and click the magnifying glass 'Q' icon to initiate the search for application details.
- 2 - Agents can search the applications based on the status of the applications. Click the status field and select one of the following status from the drop down menu. Application will display the applications based on the status agent has selected.
- 3 - Click the Advanced search field and use the applicable below mentioned fields to narrow down the search results.

The screenshot shows a search form with the following elements:

- A search bar with a magnifying glass icon and a "Search" button.
- A "Status" dropdown menu.
- A red "Advance Search" button.
- Input fields for "Applicant Name" and "Broker Name".
- Date pickers for "From Date" and "To Date" with "MM/DD/YYYY" placeholders.
- A "Cancel" button and a "Search" button.
- Dropdown menus for "Exchange Value" and "State".

Field	Description
Applicant Name	Specify the first name of the applicant. Name should not exceed 50 characters. If the input first name contains any special characters except hyphens and apostrophes and numbers other than alphabets, the application displays the error message: "First name can only contain letters".
Broker Name	Specify the first name of the Broker. Name should not exceed 50 characters. If the input first name contains any special characters except hyphens and apostrophes and numbers other than alphabets, the application displays the error message: "First name can only contain letters".
From Date	Select the "From Date" from the drop down calendar by clicking this icon
To Date	Select the "To Date" from the drop down calendar by clicking this icon
Exchange Value	Select the below mentioned exchange value from the drop down: <ul style="list-style-type: none"> <li>• All</li> <li>• On</li> <li>• Off</li> <li>• State On</li> </ul>
State	Select the applicable state from the drop down menu.
Search	Click the <b>Search</b> button to initiate the search.
Cancel	Click the <b>Cancel</b> button to abort the search.

- 4 - Click the "click here" link to download the application.



## 12 Carrier Appointments

In order to sell any plans agency/agents has to get an appointment from the carriers. Application allows the agency to sell the plans only if agency has carrier appointment.

Application allows the agency to add the carrier appointments in their profile. And application allows the agent to add the carrier appointment against the agent.

The screenshot shows the 'Carrier Appointments' section of a web application. At the top, there is a search bar (1) with a magnifying glass icon, an 'Advance Search' button (2), a 'Bulk Add Carriers' button (3), and an 'Add Carriers' button (4). Below these is a table with columns: Carrier, State, Agent ID, Type, L O B, Effective Date, and Action. The table contains five rows of carrier data. The 'Action' column for each row has a 'Delete' link with a trash icon. A callout (5) points to the first 'Delete' link.

Carrier	State	Agent ID	Type	L O B	Effective Date	Action
Zoom Health Pla...	Oregon	432	Individual	Medical	03/23/2017	Delete
Trillium Commun...	Oregon	321	Individual	Medical	03/23/2017	Delete
Providence Heal...	Oregon	5643	Individual	Medical	03/23/2017	Delete
PacificSource H...	Oregon	4532	Individual	Medical	03/23/2017	Delete
Moda Health Pla...	Oregon	654	Individual	Medical	03/23/2017	Delete

- 1 - Click the search filed and enter the carrier name and click the magnifying glass 'Q' icon to initiate the search for carrier details.
- 2 - Click the Advanced search field and use the applicable below mentioned fields to narrow down the search results:

Field	Description
Line of Business	<p>Select one of the following applicable Line of business from the advanced search:</p> <ul style="list-style-type: none"> <li>• Medical</li> <li>• Dental</li> <li>• Vision</li> <li>• Term Life</li> <li>• Dental, Vision and Hearing</li> <li>• Out of Pocket Protection</li> <li>• Term Life with Critical illness</li> <li>• Supplemental Health</li> <li>• Accidental Insurance</li> <li>• Short Term Medical</li> <li>• Final Expanse</li> </ul>
Business Type	<p>Select one of the following applicable business type:</p> <ul style="list-style-type: none"> <li>• Individual</li> <li>• Commercial SG</li> </ul>
State	Select the applicable state from the drop down menu.

- 3 - Click the **Bulk Add Carriers** button to do the carrier appointment in bulk. Do the following steps to do bulk carrier appointments.

Field	Mandatory	Description
Select States	Yes	Select the applicable states from the drop down
Business Type	Yes	Select one of the following applicable business type: <ul style="list-style-type: none"> <li>• Individual</li> <li>• Commercial SG</li> </ul>
Line of Business	Yes	Select one of the following applicable Line of business from the advanced search: <ul style="list-style-type: none"> <li>• Medical</li> <li>• Dental</li> <li>• Vision</li> <li>• Term Life</li> <li>• Dental, Vision and Hearing</li> <li>• Out of Pocket Protection</li> <li>• Term Life with Critical illness</li> <li>• Supplemental Health</li> <li>• Accidental Insurance</li> <li>• Short Term Medical</li> <li>• Final Expanse</li> </ul>

Fetch Click the **Fetch** button to obtain the list of carriers and

- 4 - Click the **Add Carriers** button to add an individual carrier appointment to the agent.

Field	Mandatory	Description
State	Yes	Select the applicable states from the drop down.
Agent Id	Yes	Specify the agent id in this field.
Carrier	Yes	After selecting the applicable state, application will show the available carrier for that state. Application allows the agency/agent to select the applicable carrier.
Business Type	Yes	Select one of the following applicable business type: <ul style="list-style-type: none"> <li>Individual</li> <li>Commercial SG</li> </ul>
Line of Business	Yes	Select one of the following applicable Line of business from the advanced search: <ul style="list-style-type: none"> <li>Medical</li> <li>Dental</li> <li>Vision</li> <li>Term Life</li> <li>Dental, Vision and Hearing</li> <li>Out of Pocket Protection</li> <li>Term Life with Critical illness</li> <li>Supplemental Health</li> <li>Accidental Insurance</li> <li>Short Term Medical</li> </ul>

Field	Mandatory	Description
		<ul style="list-style-type: none"> <li>Final Expense</li> </ul>
Effective Date from	Yes	Specify the " <b>Effective Date From</b> " by clicking calendar field.
Renewal Date	No	Specify the "Renewal Date" by clicking the calendar field.
Save		Click the <b>Save</b> button to save the appointment.
Cancel		Click the <b>Cancel</b> button to abort the action.

- 5 - Click the **Delete** button to delete the appointments from your profile.

**Note:** you can no longer sell the plans of the carrier which is deleted.

## Notes

SAMPLE

## Notes

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**Supersedes BE Agent Guide – V2.0 ( February 2017)**