Sample User Guide

BrokerEngage Portal

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2/10/2022

Authoring Tool: Microsoft Word

Table of Contents

Revision History

Date	Version	Reason for Change	Author
16/01/2017	1.0	Initial draft	Vignesh Srinivasan.S
07/02/2017	2.0	Updated the screenshots and formats	Vignesh Srinivasan S
10/02/2022	3.0	Updated the screenshots and formats	Vignesh Srinivasan S

Table of Figures

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.

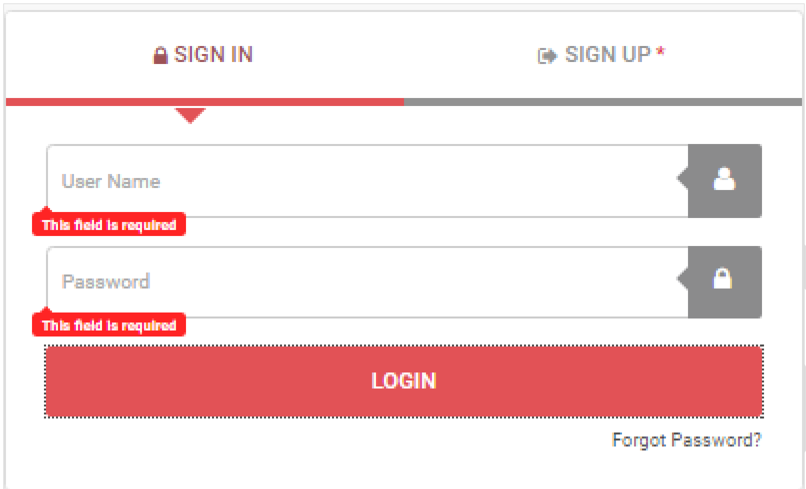
3 Login as an Agent

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 :** xxxxxxx **Password :** xxxxx 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

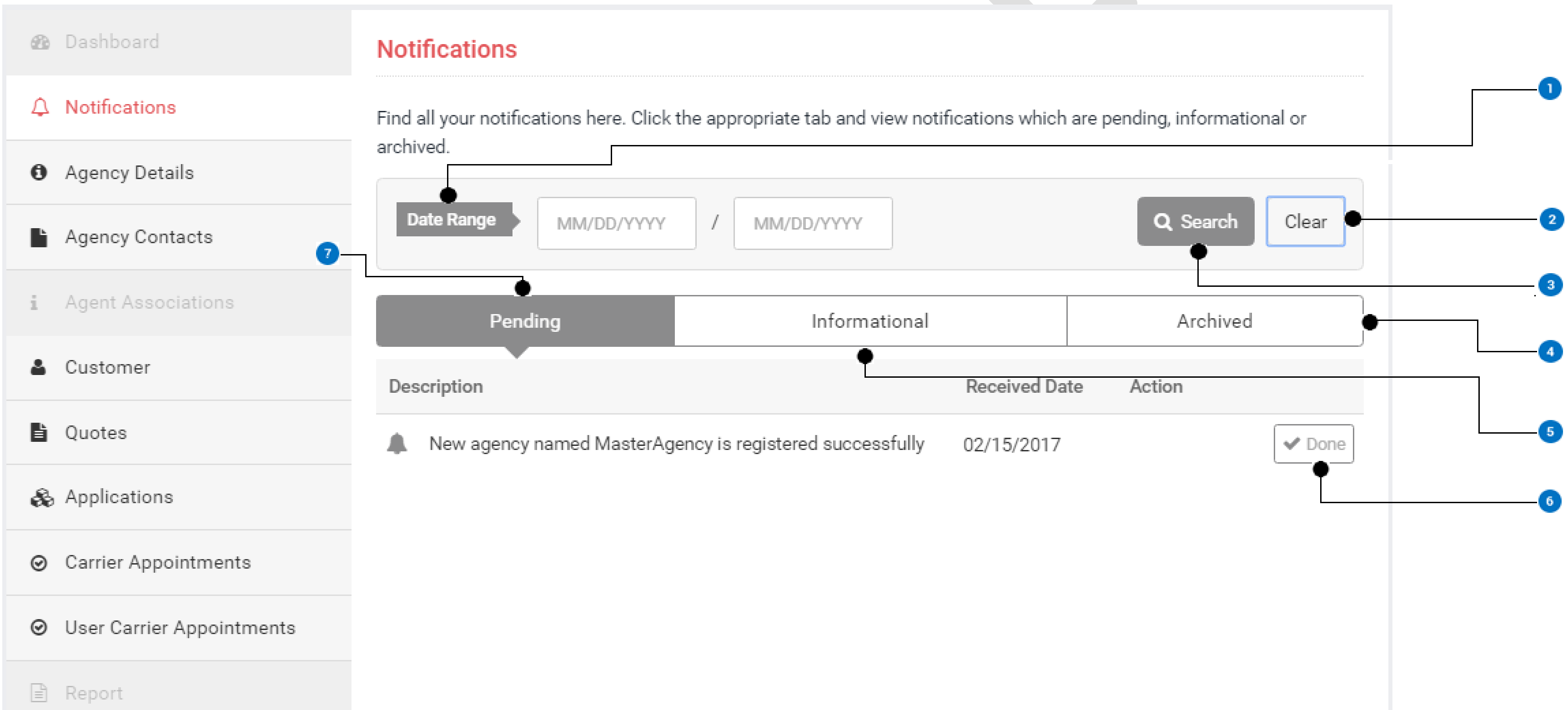
Enter the credentials received through the email and login to the application.



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.



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

Figure 2: Notification Page.

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

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

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

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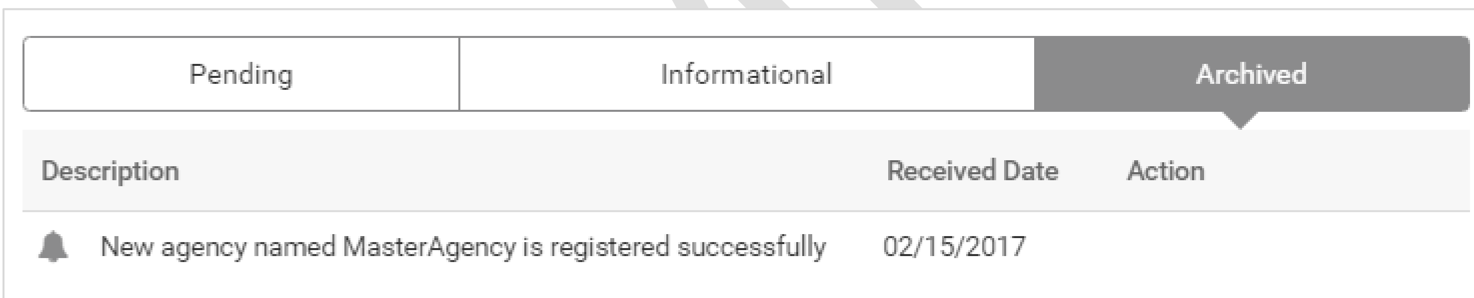
4 - **Archived** (refer Figure 2: Notification Page)



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

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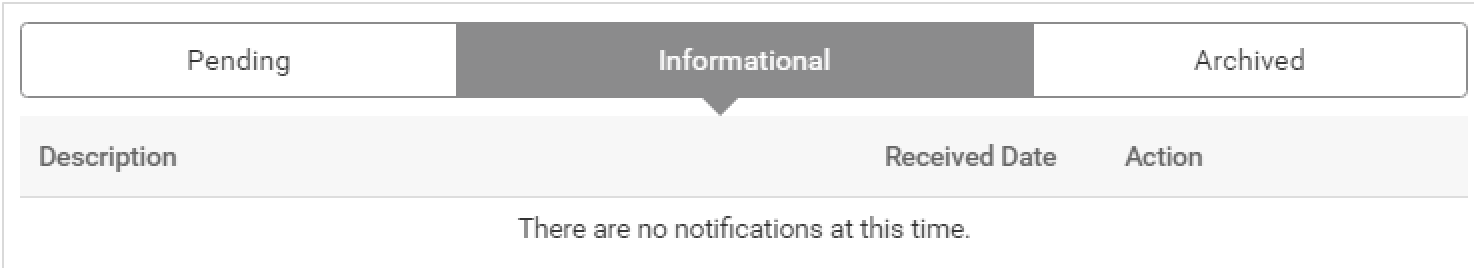
5 - **Informational** (refer Figure 2: Notification Page)



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

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

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

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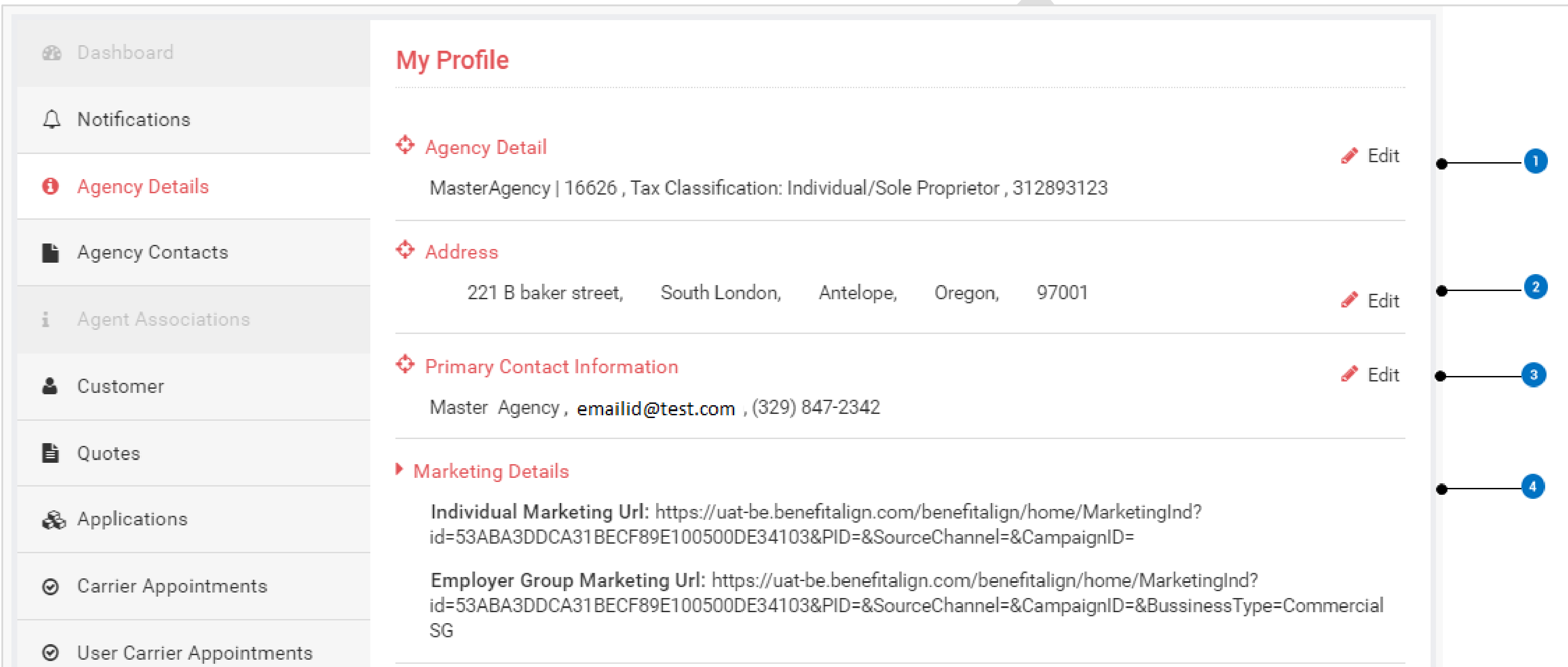
5 Agency Details

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



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

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

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

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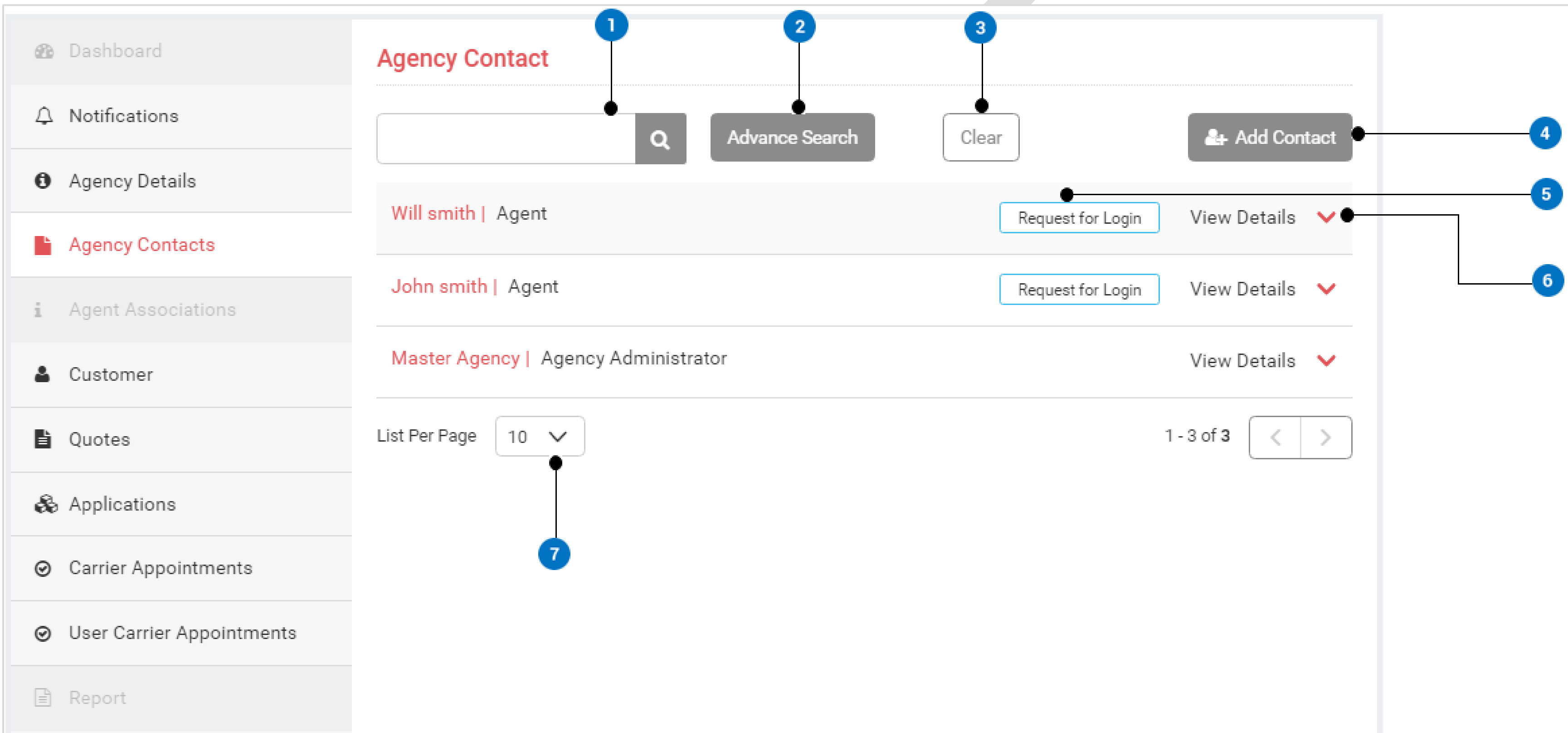
4 - **Marketing Details** (refer Figure 3: Agency Details)

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

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.



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

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

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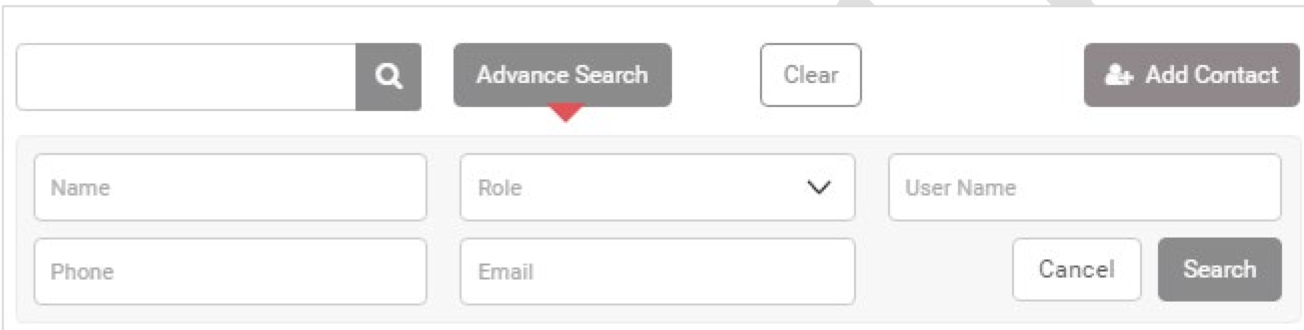
2 - **Advanced Search** (refer Figure 4: Agency Contacts)



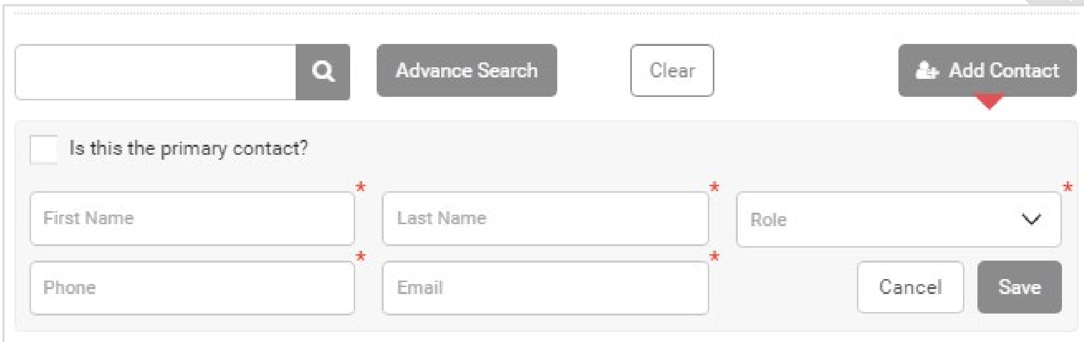
Field	Description
Name	Enter the Agent/Agency admin/Office staff name which was already registered in the application
Role	Click to see the dropdown list of the Roles, select the applicable role (Agency Administrator, Agent, and Office Staff).
User Name	Enter the registered Username of the Agent/Agency 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 **Search** button to initiate the search command.
Cancel	Click the **Cancel** 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 **Save** button to save the new contact
Cancel	No	Click the **Cancel** 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.

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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.

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7 Agent Registration

Agents required to fill the necessary details.

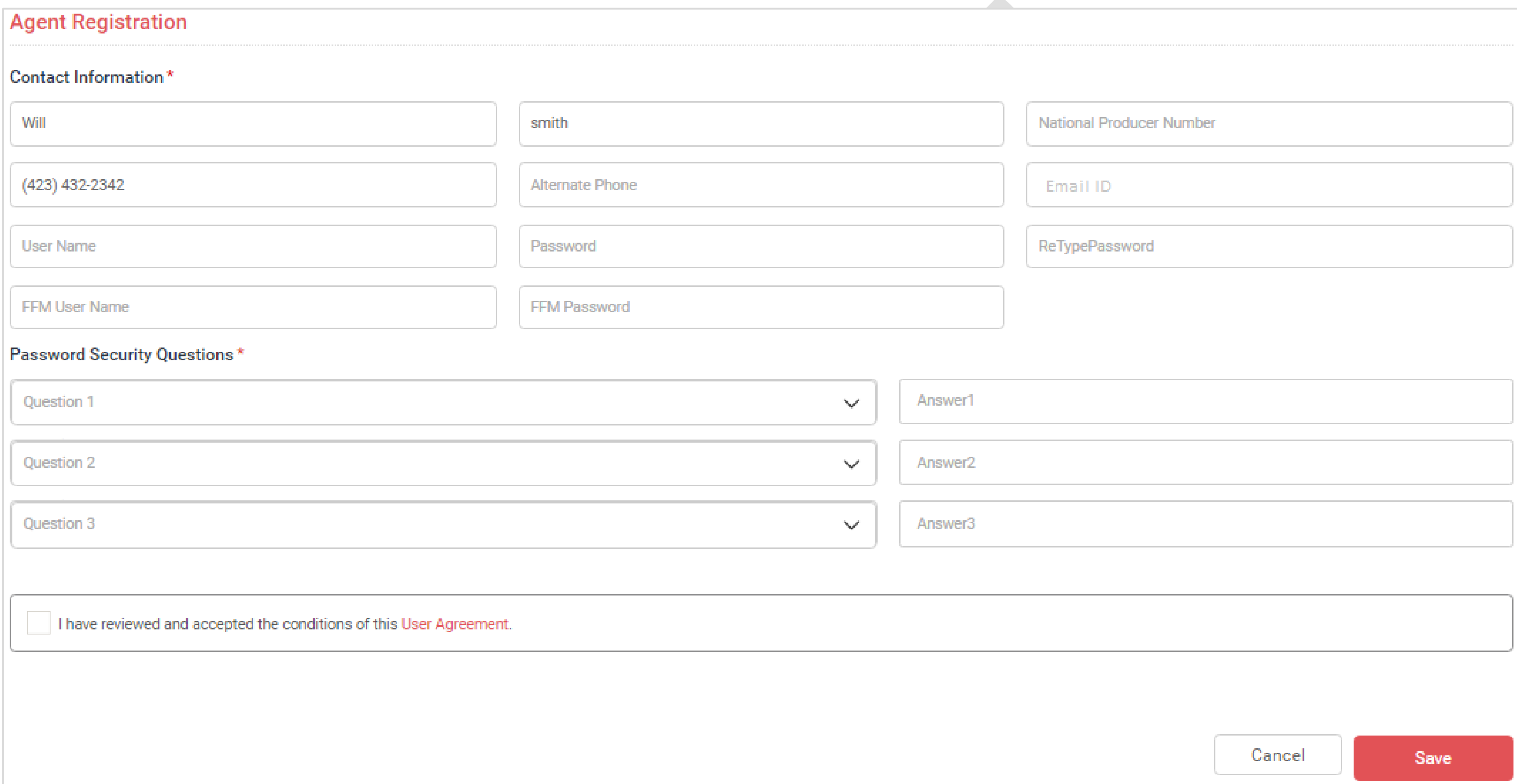


Figure 5: Agent Registration

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	Select one of the following security questions from the drop down menu. And Answer the security questions respectively: 1. What is the name of your favorite childhood friend? 2. In which city you were born? 3. What is your mom's maiden name? 4. What was your first pet's name?

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 **Save** button to save the new contact
Cancel	No	Click the **Cancel** 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.

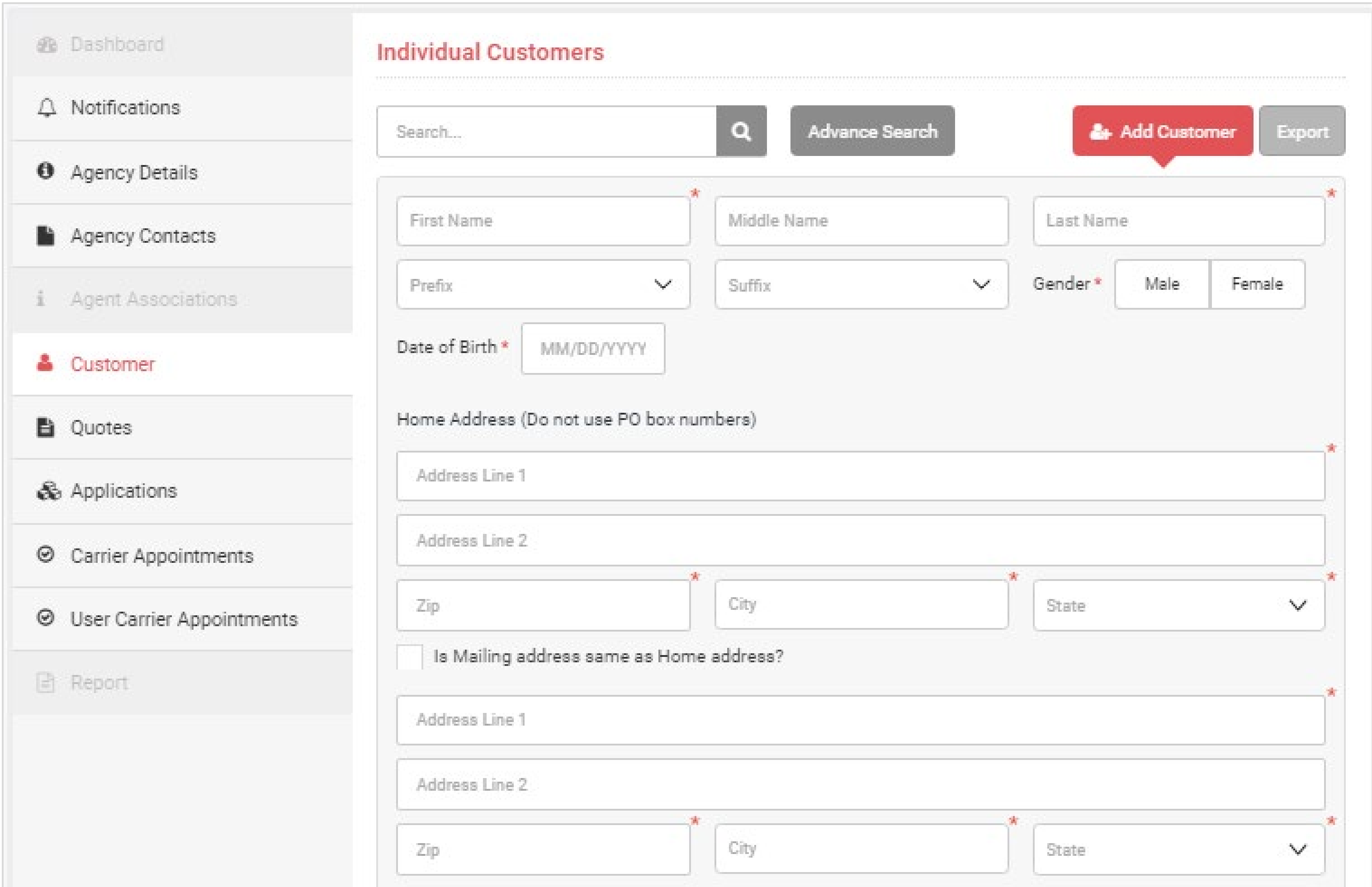
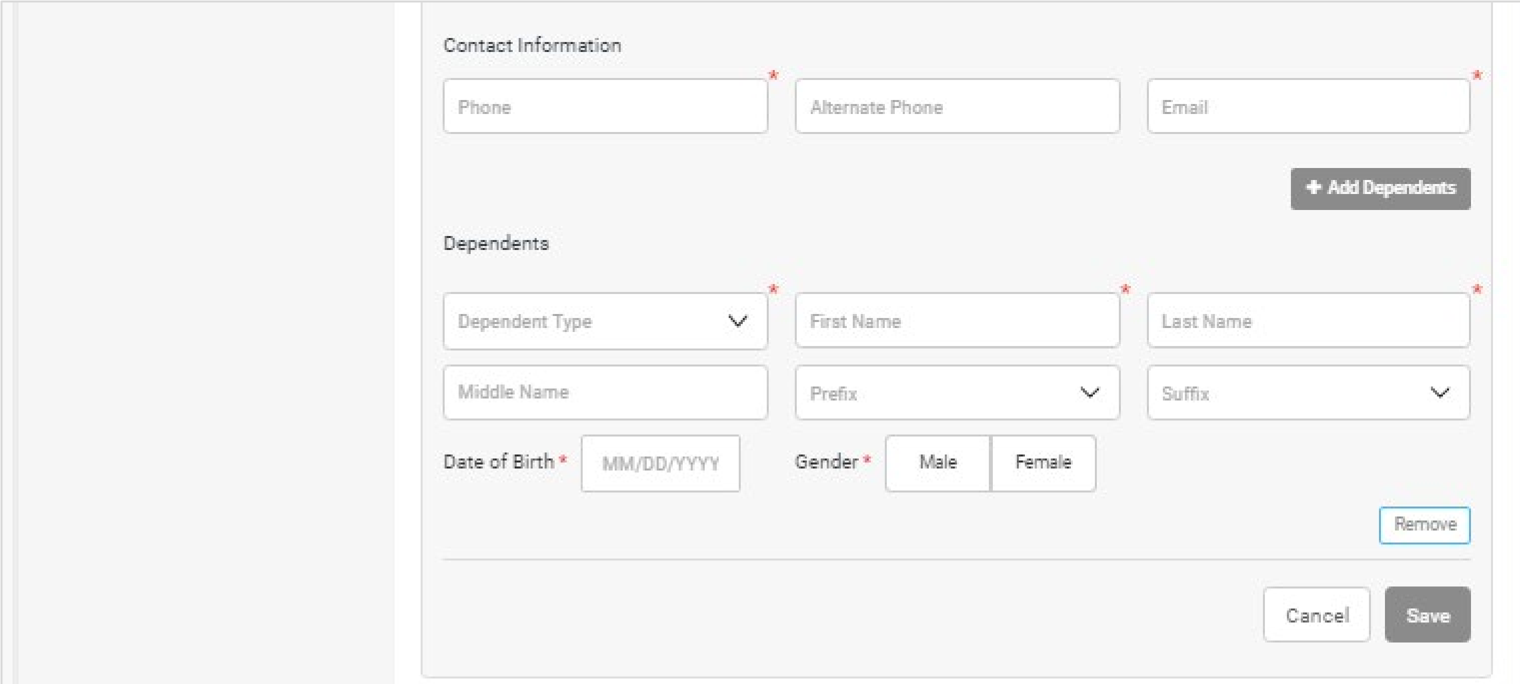


Figure 6: Add Customers



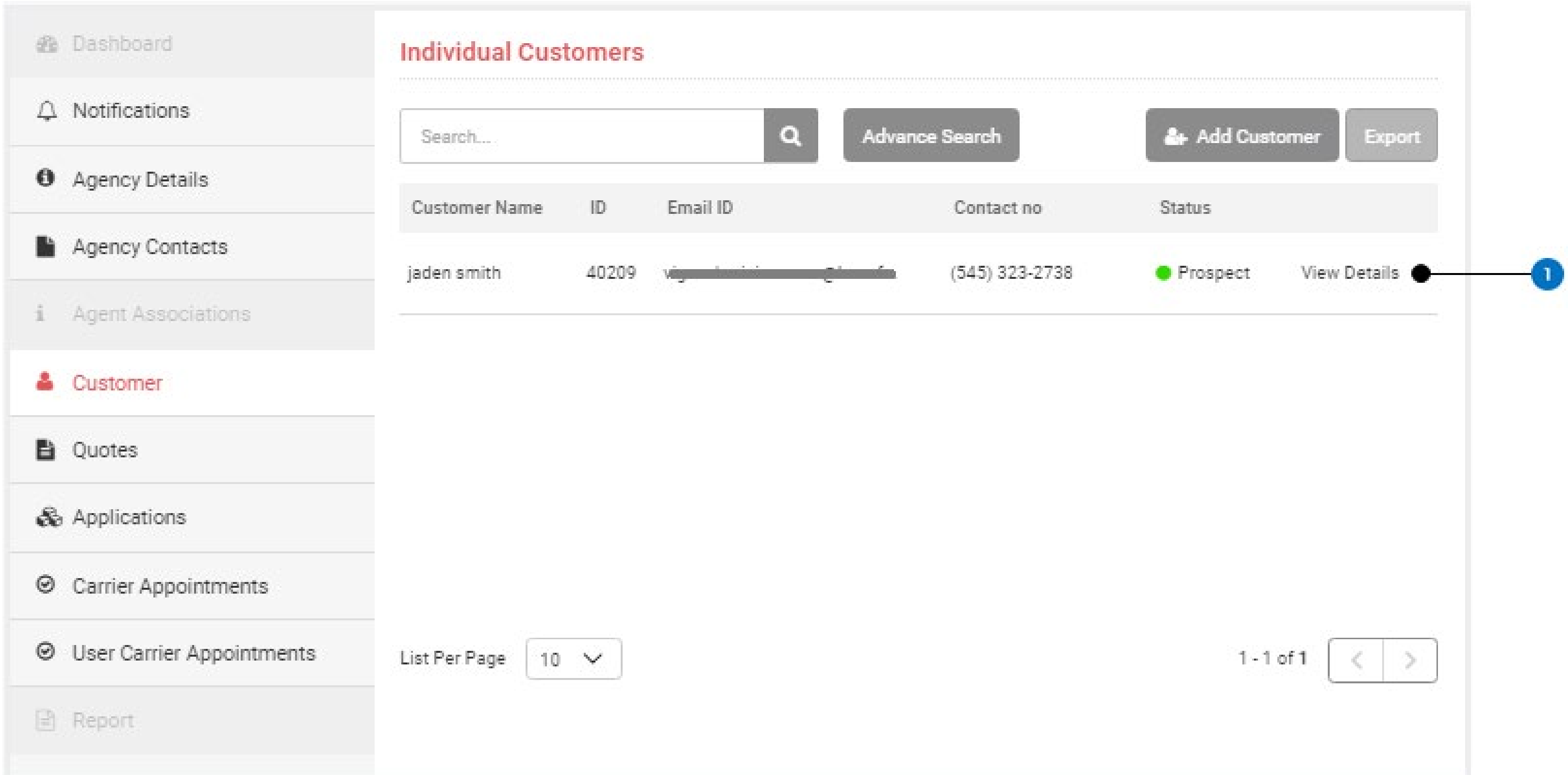
Field	Mandatory	Description
First Name	Yes	Specify the first name of the customer. Name should not exceed 50 characters. If the input first name contains any special characters except hyphens and apostrophes and numbers other than alphabets, the application displays the error message: "First name can 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.
Home Address (Do not use PO box numbers)		
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.
Contact Information		
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.
Add Dependents		
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 **Remove** button.
Save	No	Click the **Save** button to save the customer details
Cancel	No	Click the **Cancel** button to cancel the operation.

View Customer Details

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



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.

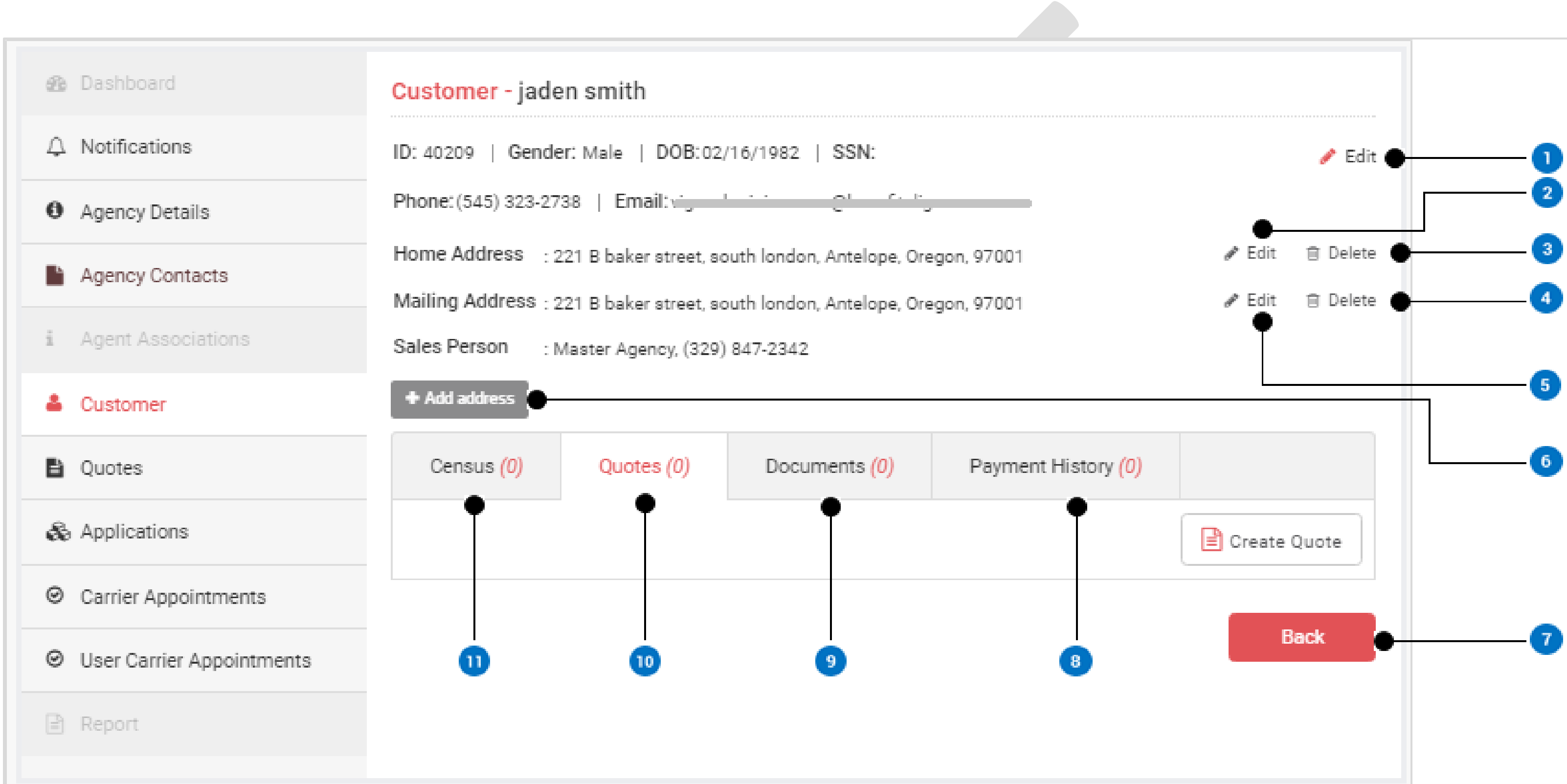
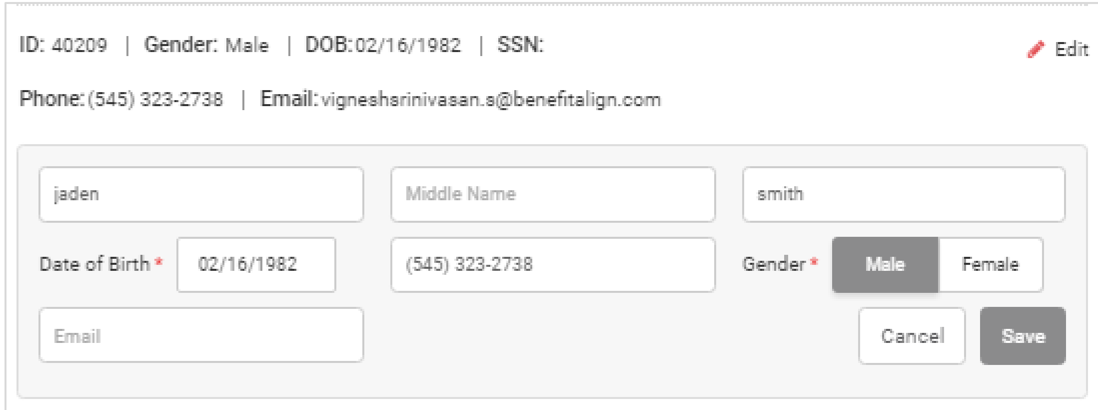


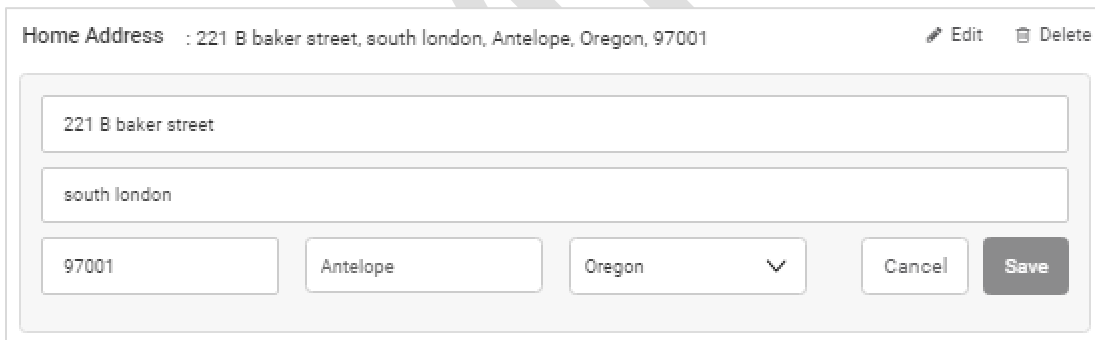
Figure 7 : View Customer Details

Go to Main Menu

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



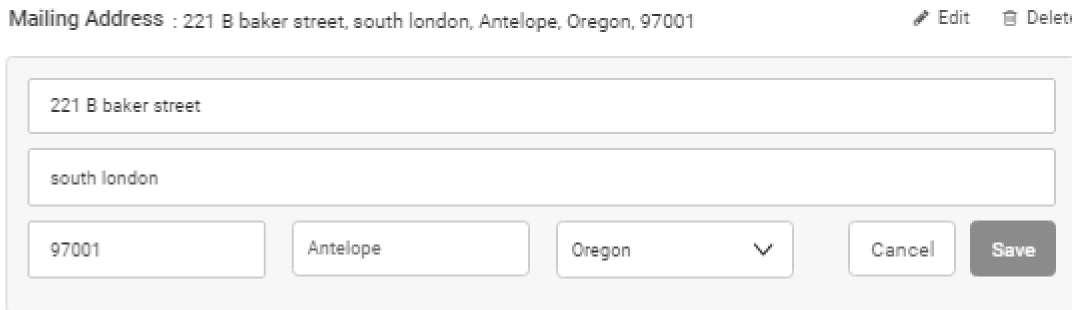
2 - Click the **Edit** button to edit the Home address. Refer to Figure 7: View Customer Details



3 - Click the **Delete** button to delete the **Home Address.**

4 - Click the **Delete** button to delete the **Mailing Address.**

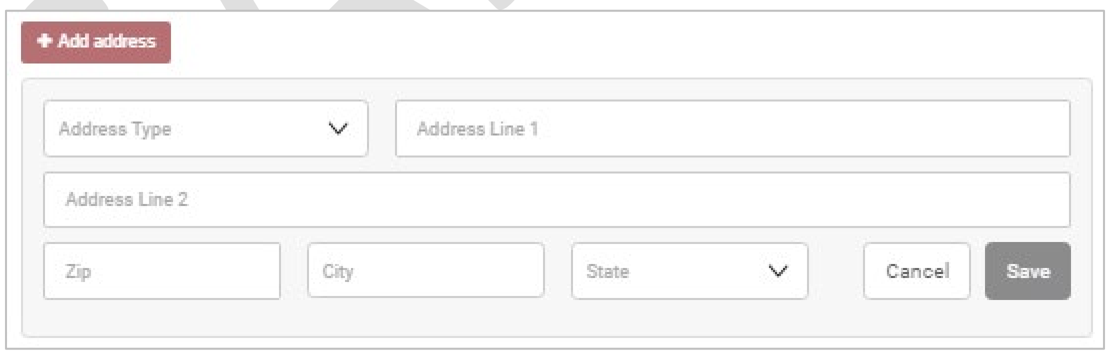
5 - Click the **Edit** button to edit the Mailing Address.

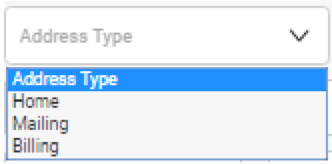


6 - Click the **Add Address** button to add any of the following Address types:

- 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





7 - Click the **Back** button to go back to the previous page.

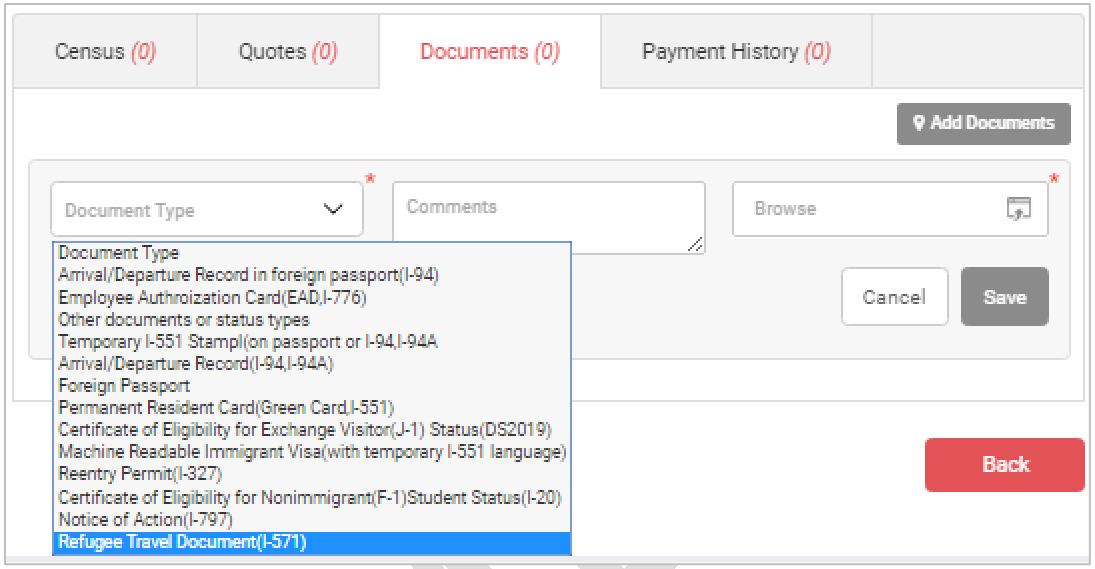
8 - Click the **Payment History** tab to view the customer's payment history.

- 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	Print

9 - **Documents**



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.

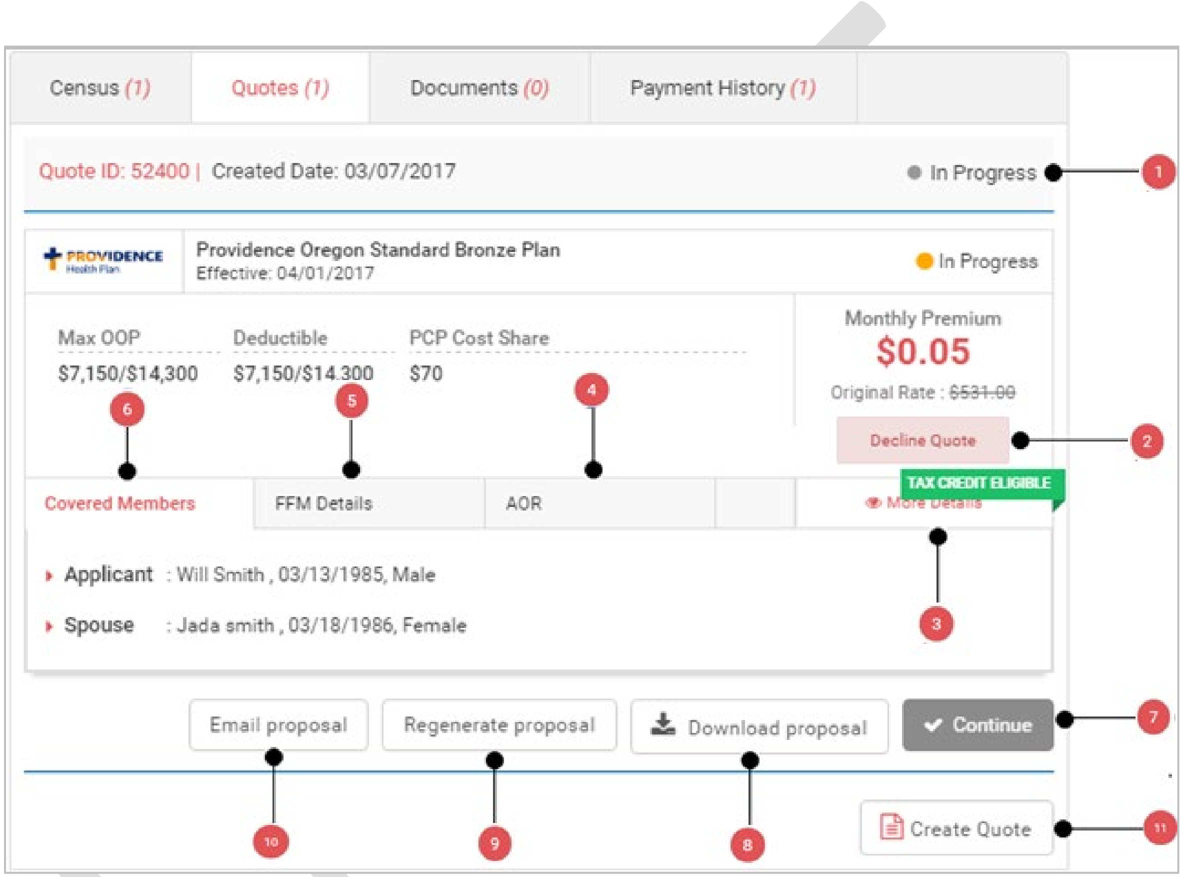


Figure 8 : How to create quotes?

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.

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.

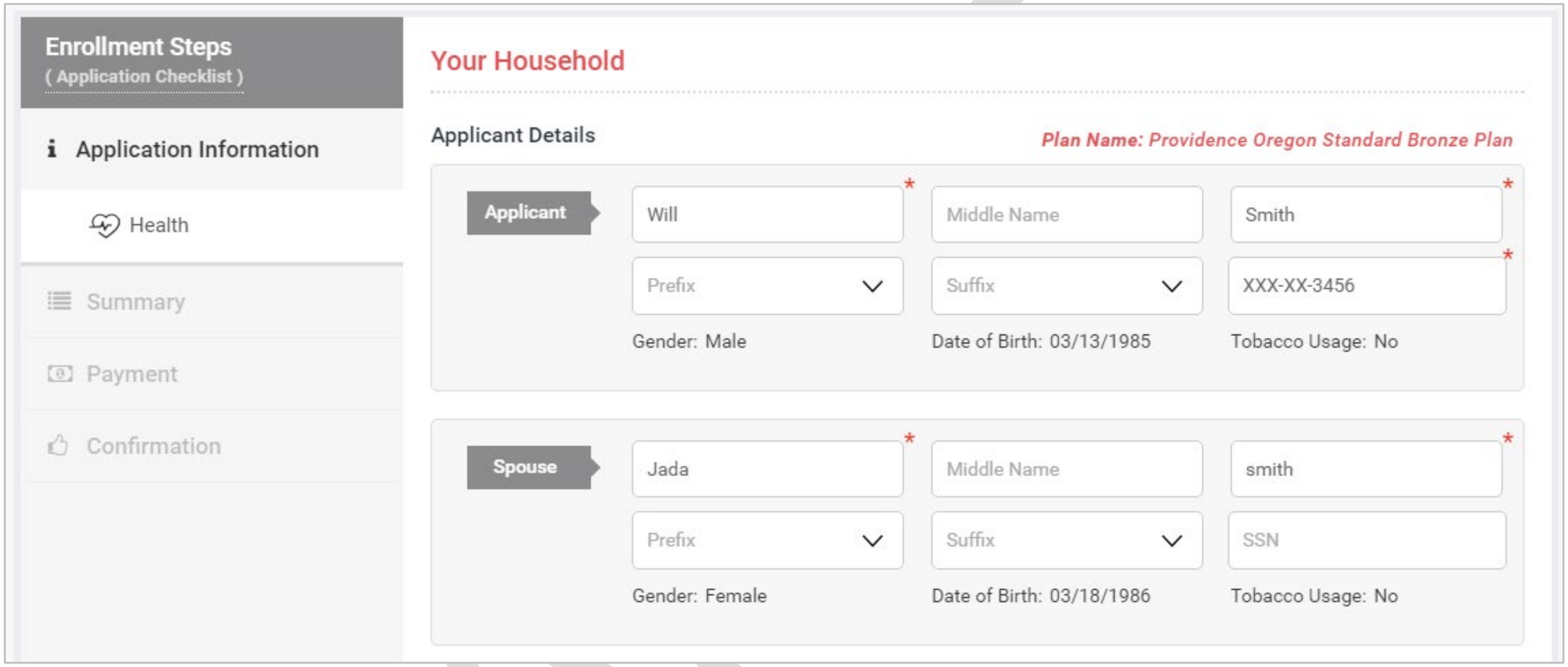
Note: Make sure that the carrier mapping has done before quoting, refer to.

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

9 Enrollment Steps

1.1 Application Information

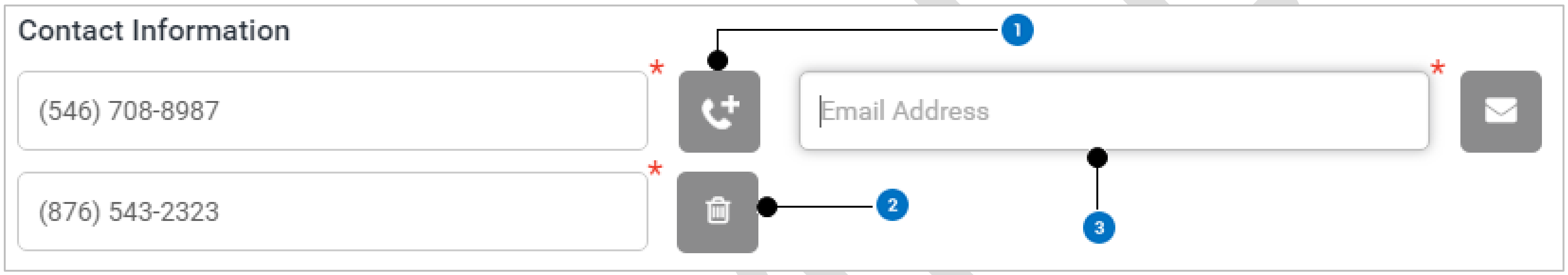
1.1.1 Agent can edit the Applicant and Spouse/Dependents details.



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 :



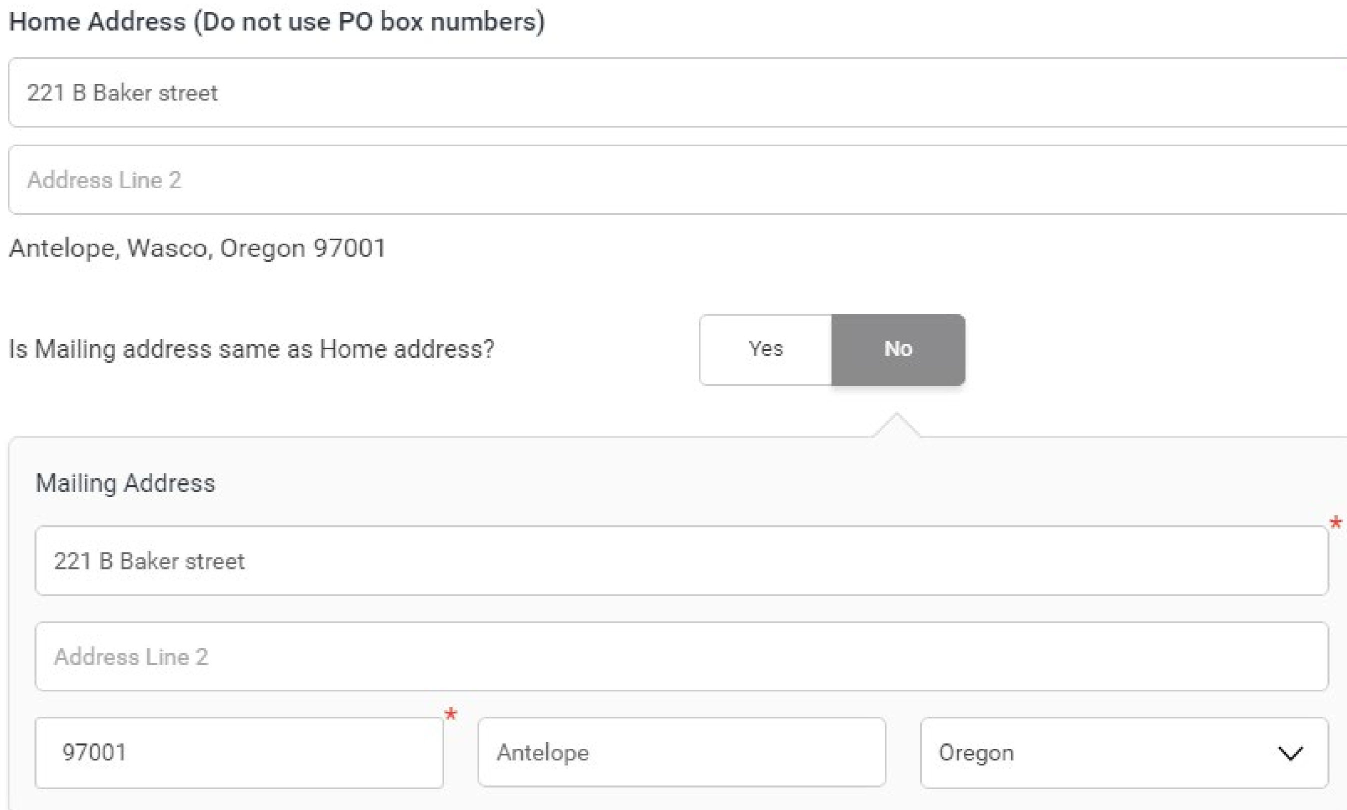
1 - Click the Phone icon to add alternate phone number of the applicant.

2 - Click the Bin icon to delete the alternate phone numbers of the applicant.

3 - Edit/Update the email address

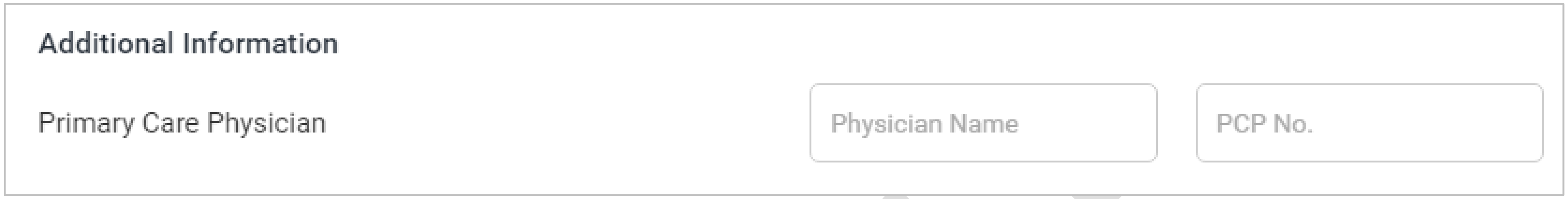
Go to Main Menu

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



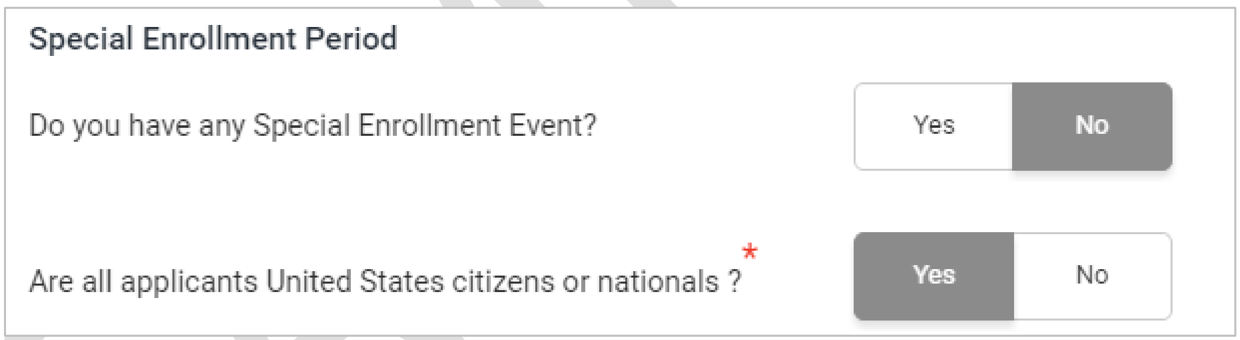
1.1.4 Additional Information

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



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.



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

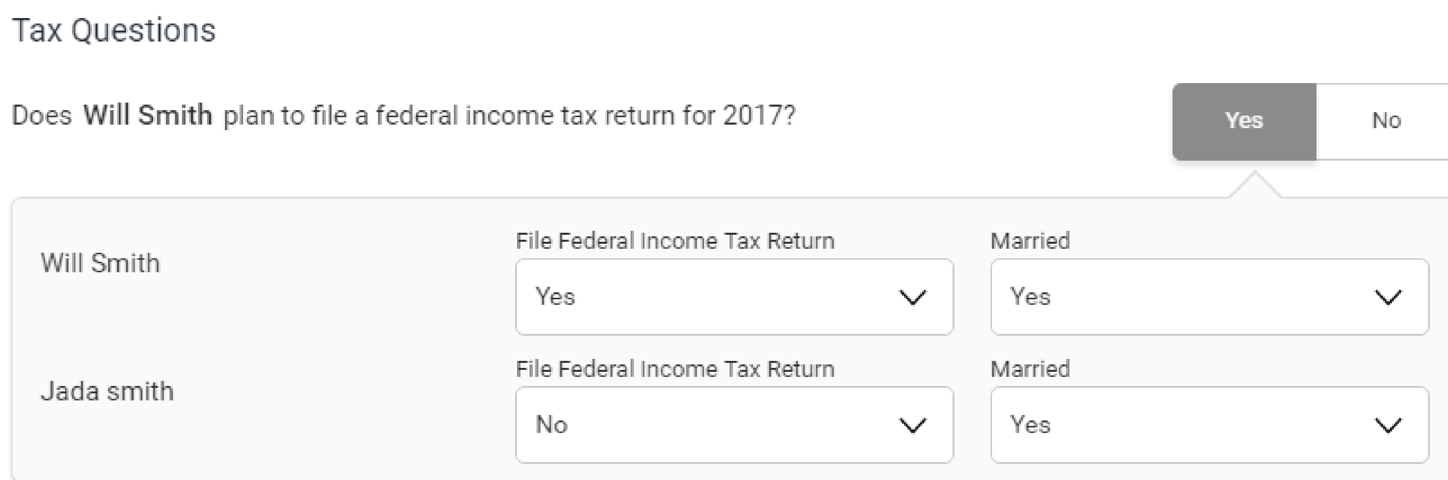
1.1.10 Answer the following circumstantial questions which is applicable to applicants:

- 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.

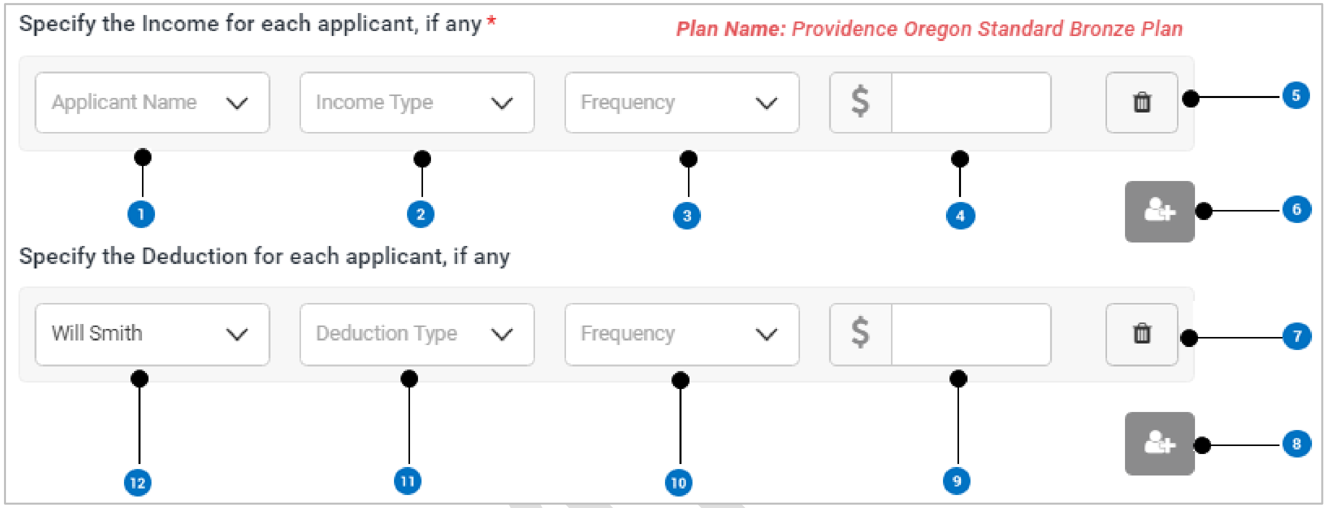


- Does applicant plan to file a joint federal income tax return with his/her spouse for 2017?
- Will applicant be claimed as a dependent on someone else's tax return for 2017?

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



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**.

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.

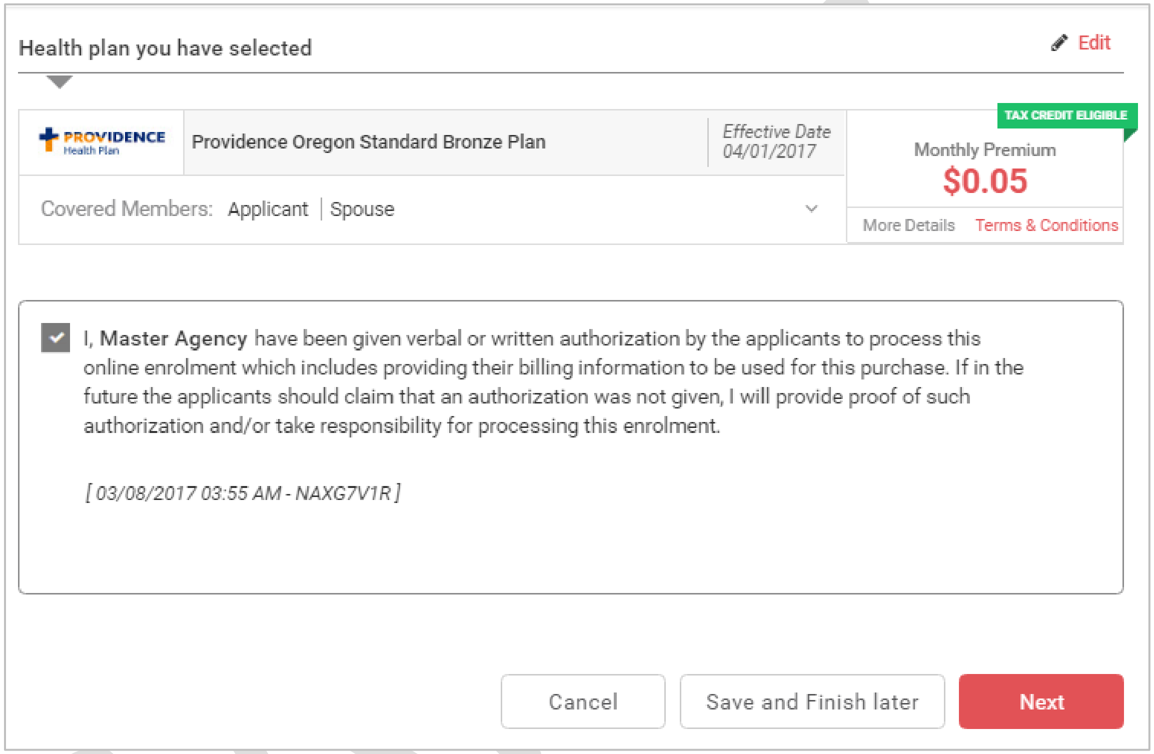
1.1.15 Click the **Save and Finish Later** button to save the enrollment and finish the enrollment later.

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.



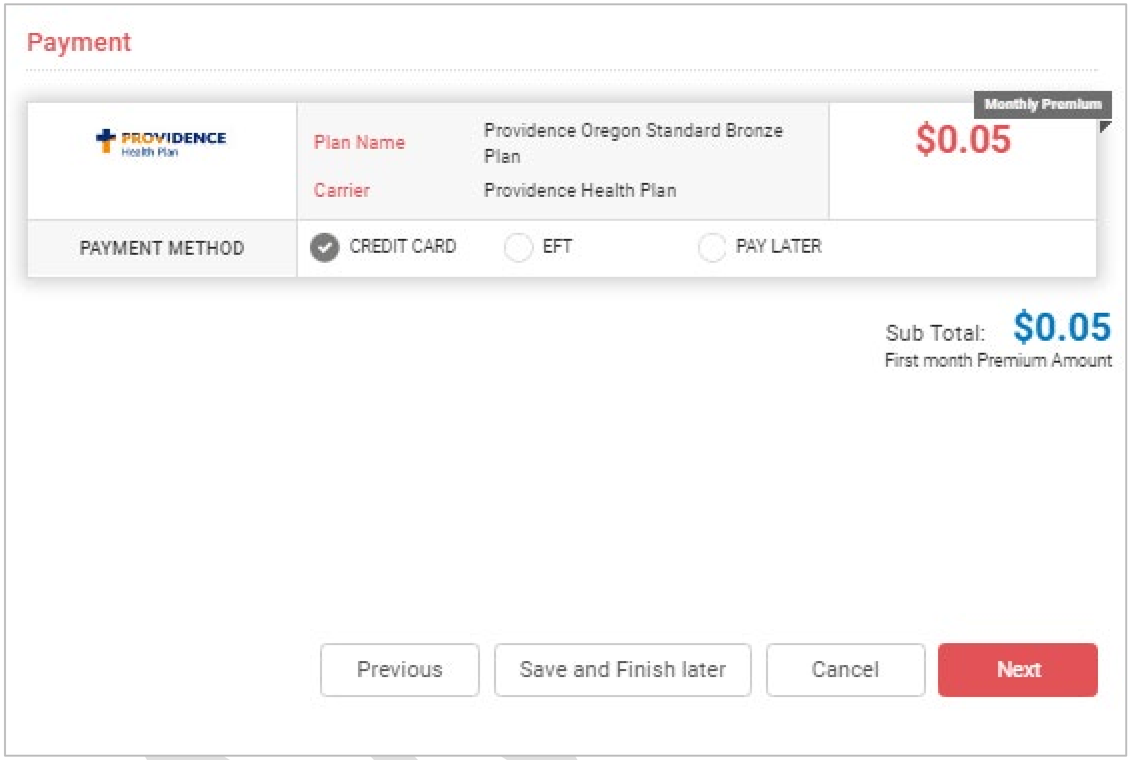
1.2.1 Click the **Check box** against the authorization statement.

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



Application will provide the payment options that follow:

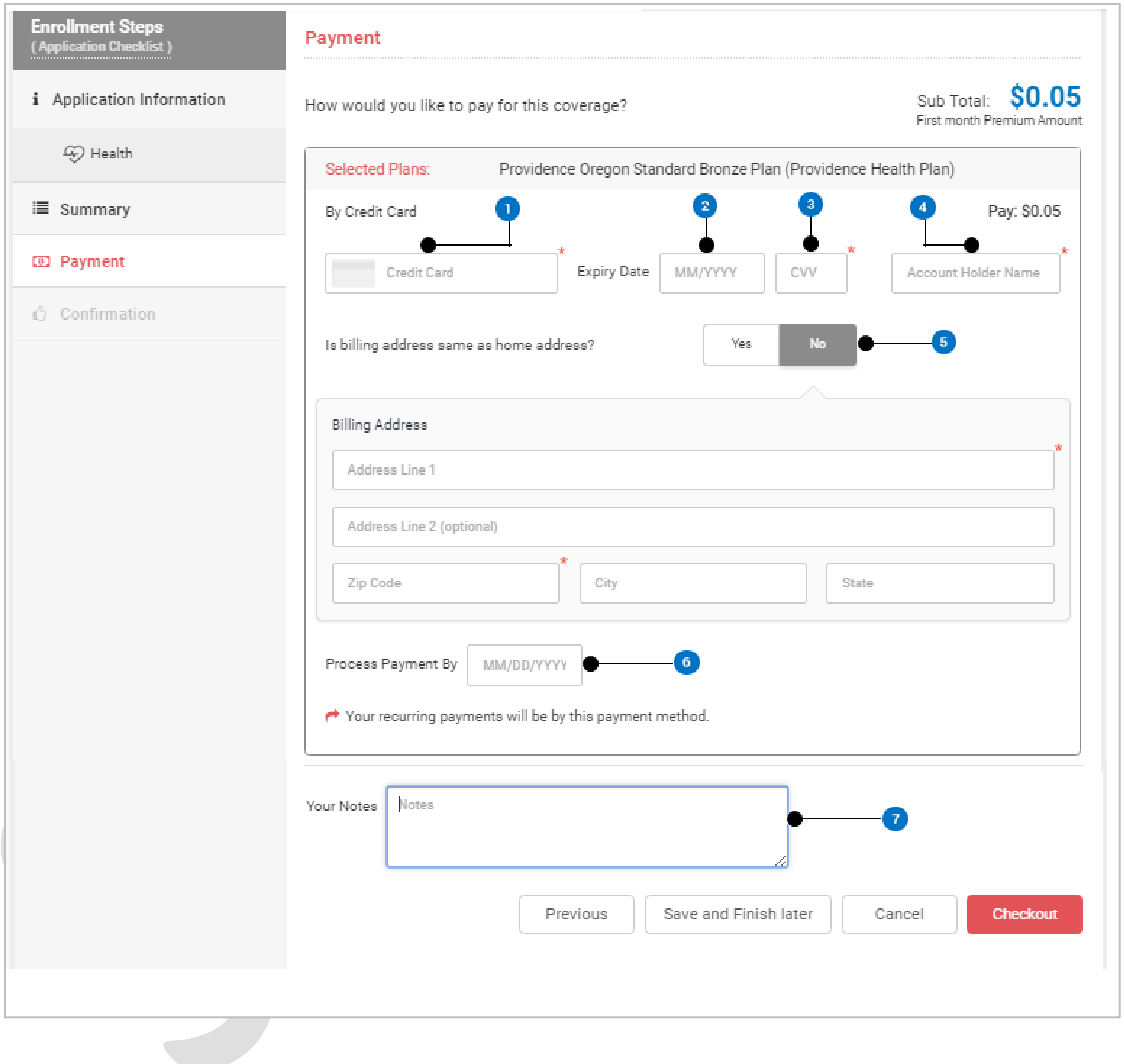
- Credit Card
- EFT
- Pay Later

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.



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.

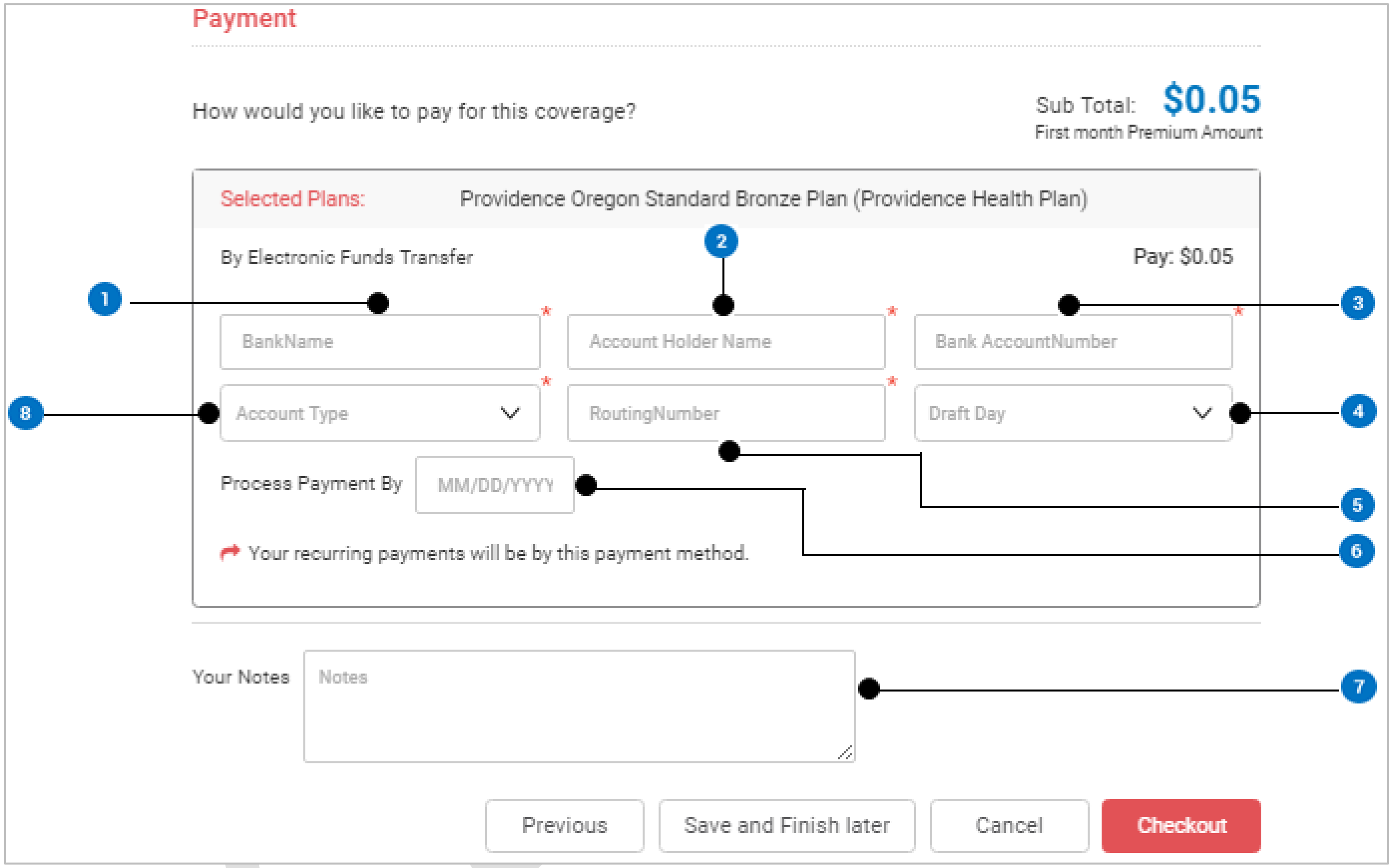
1.3.4 Click the **Next** button to proceed the enrollment steps.

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.



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.

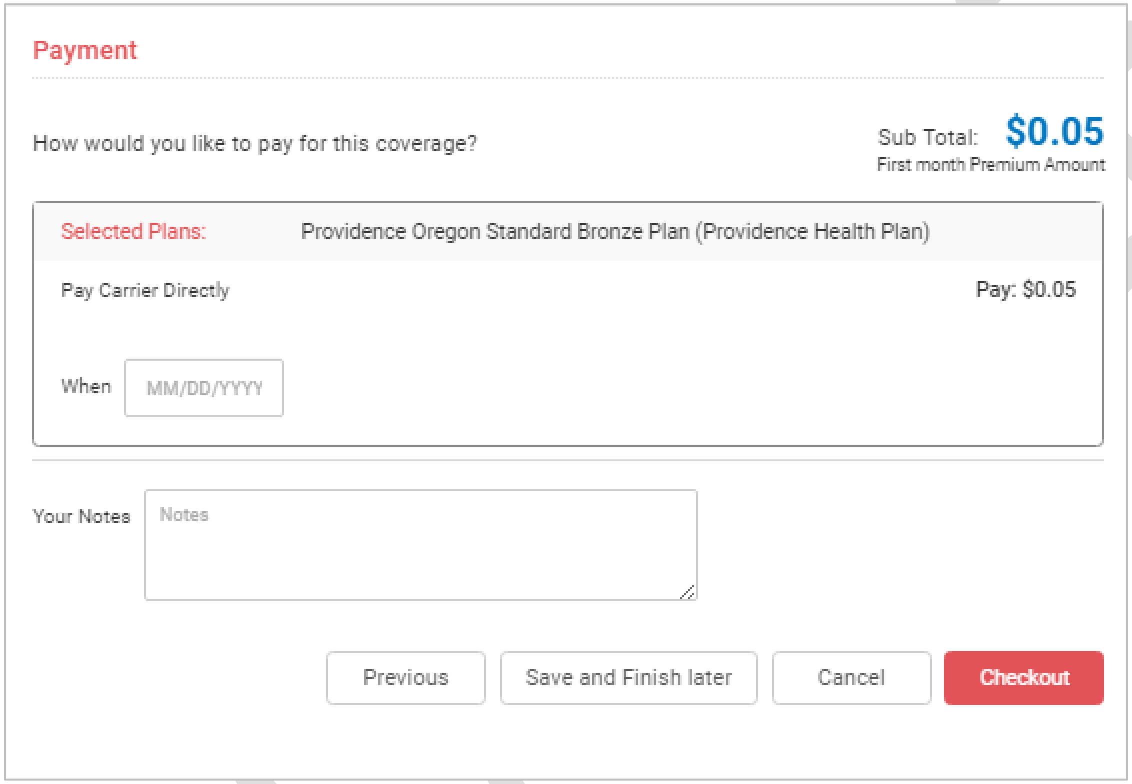
1.3.10 Click the **Cancel** button to cancel the enrollment.

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.



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

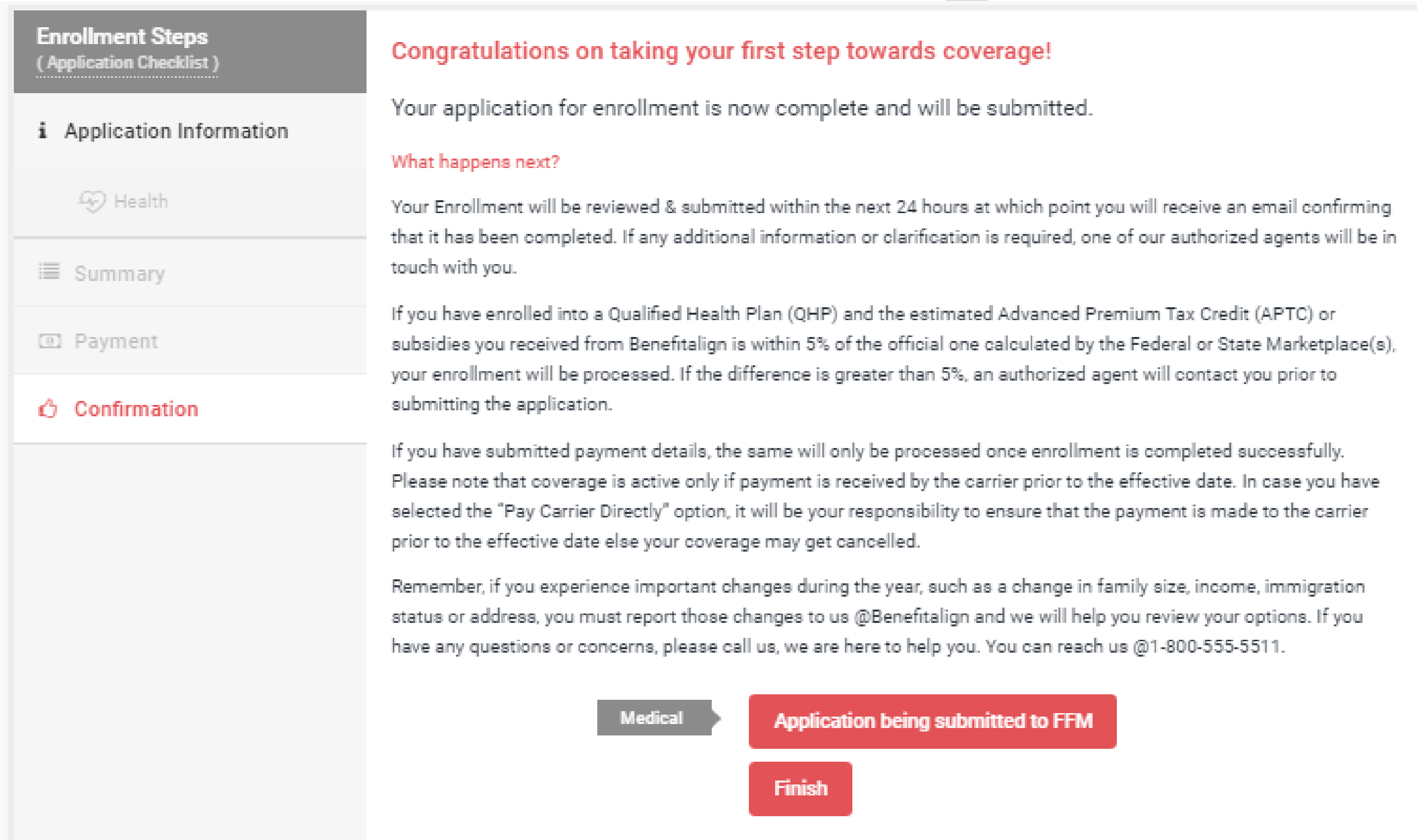
1.3.12 Click the **Next** button to proceed the enrollment steps.

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.

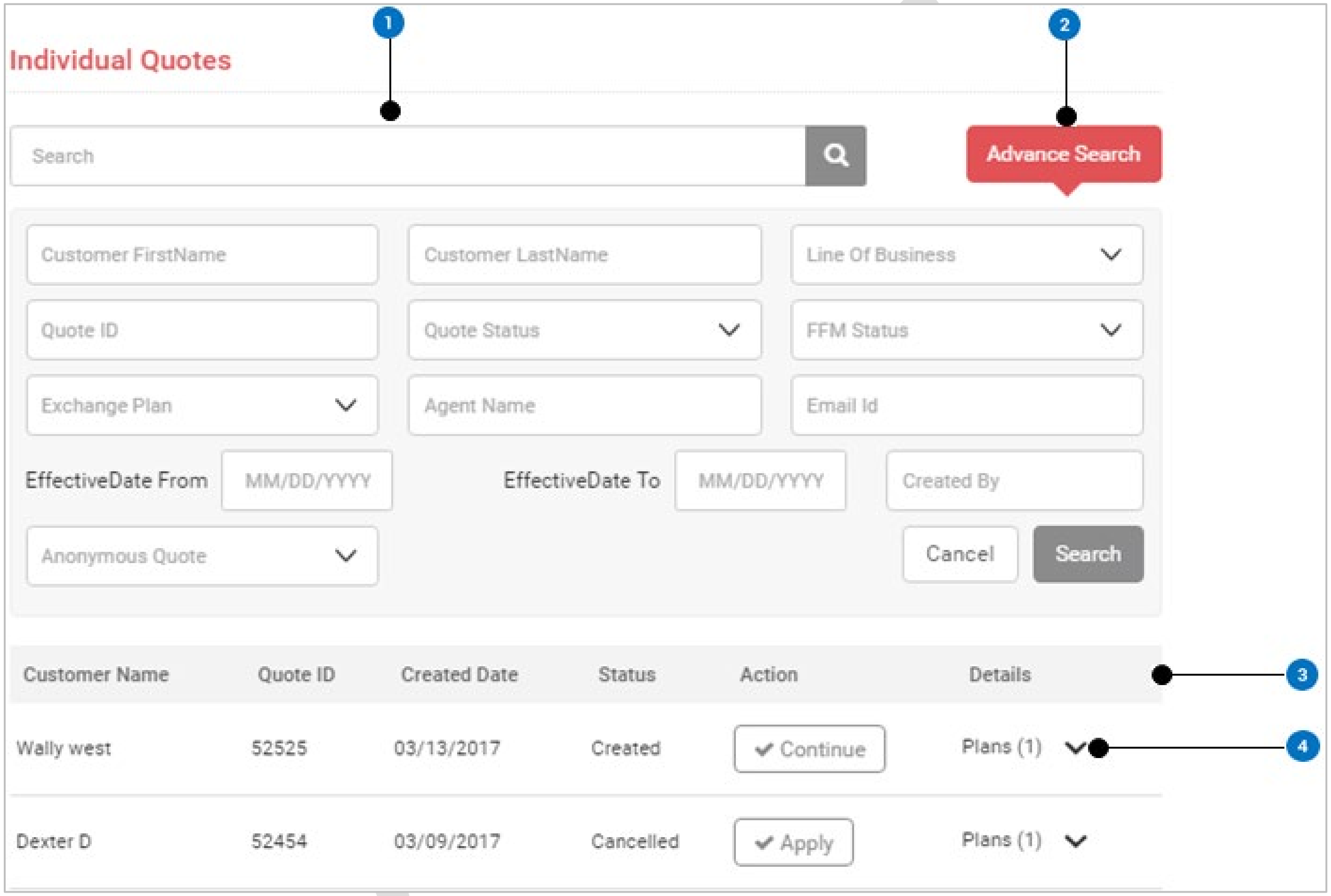
1.4 Confirmation

- 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.



10 Quotes

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



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: • Medical • Dental • Vision • Term Life • Dental, Vision and Hearing • Out of Pocket Protection • Term Life with Critical illness • Supplemental Health • Accidental Insurance • Short Term Medical • Final Expanse
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: • Created • In Progress • Install In Progress • Installed • Inactive • Terminated
FFM Status	Select one of the applicable below mentioned FFM status:

Field	Description
	• Pending • Locked-Eligibility • Submitted • Locked-Enrollment • Enrolled • Enrolled-Pay Later • Locked Payment • Premium Paid • Need More Information.
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 "**Effective Date From**" by clicking calendar field.
Effective Date To	Specify the "**Effective Date From**" 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 **Search** button to initiate the search.
Cancel	Click the **Cancel** button to abort the search.

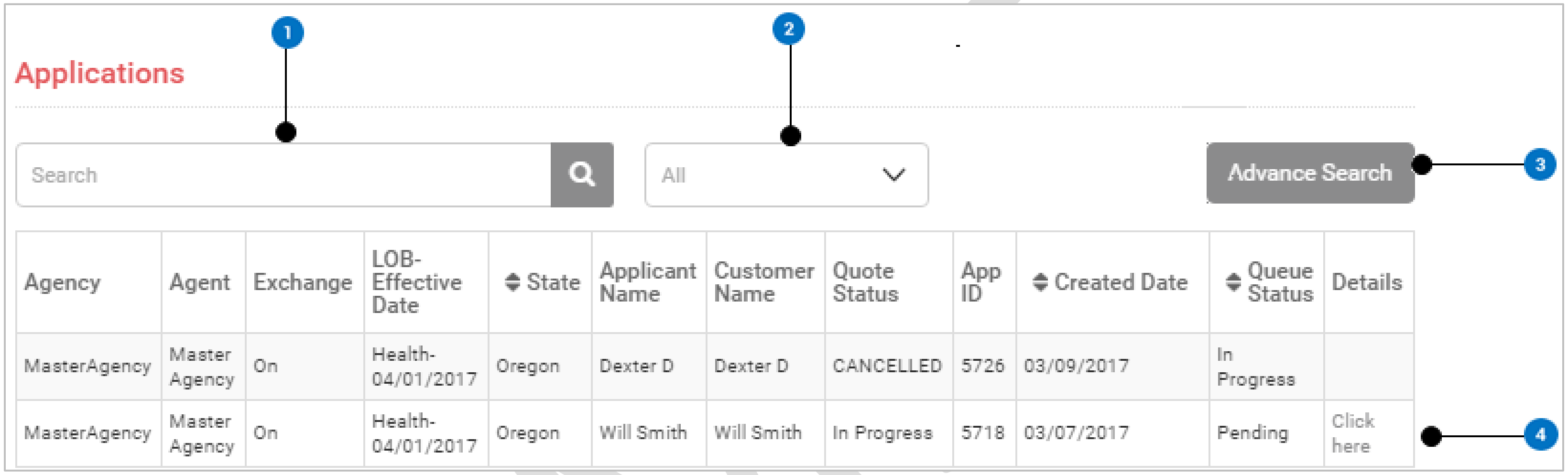
3 - You can see the search results in this row.

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.

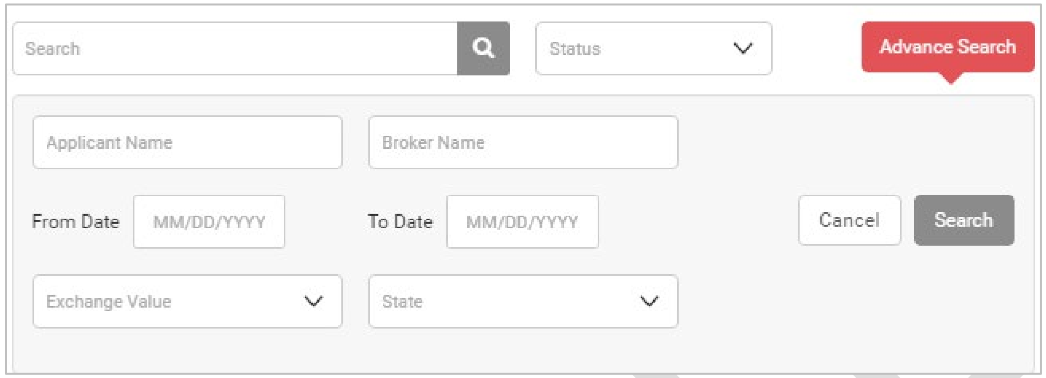
Agents can sort the result ascending or descending by clicking the ' " icon.



1 - Click the search filed and enter the customer's name and click the magnifying glass ' ' 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.



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: • All • On • Off • State On
State	Select the applicable state from the drop down menu.
Search	Click the **Search** button to initiate the search.
Cancel	Click the **Cancel** button to abort the search.

4 - Click the “click here” link to download the application.

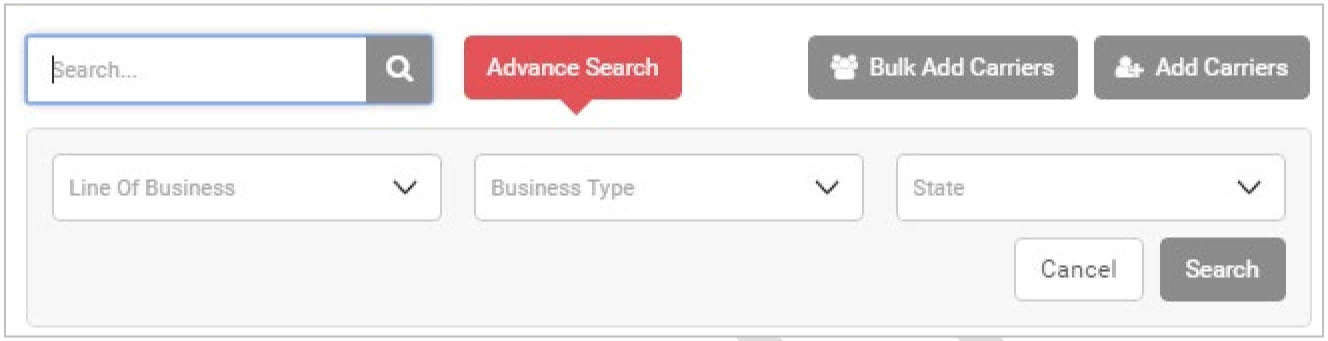
12 Carrier Appointments

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.

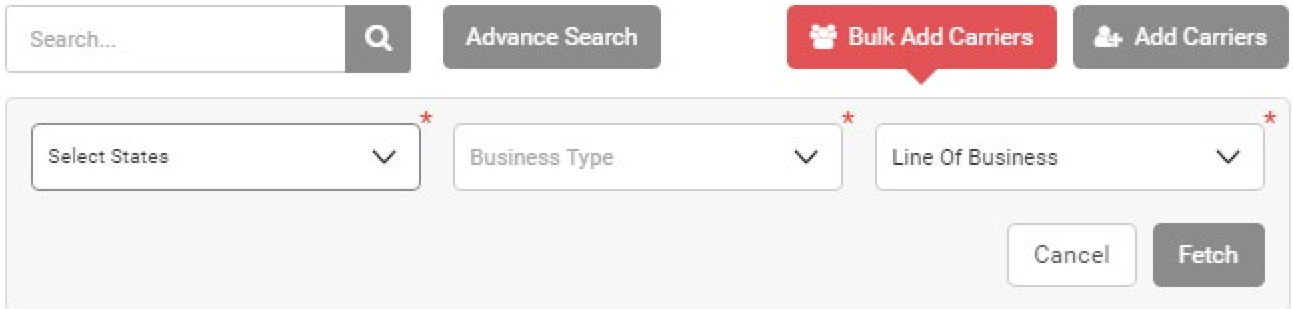
1 - Click the search filed and enter the carrier name and click the magnifying glass ' ' icon to initiate the search for carrier details.

2 - Click the Advanced search field and use the applicable below mentioned fields to narrow down the search results:



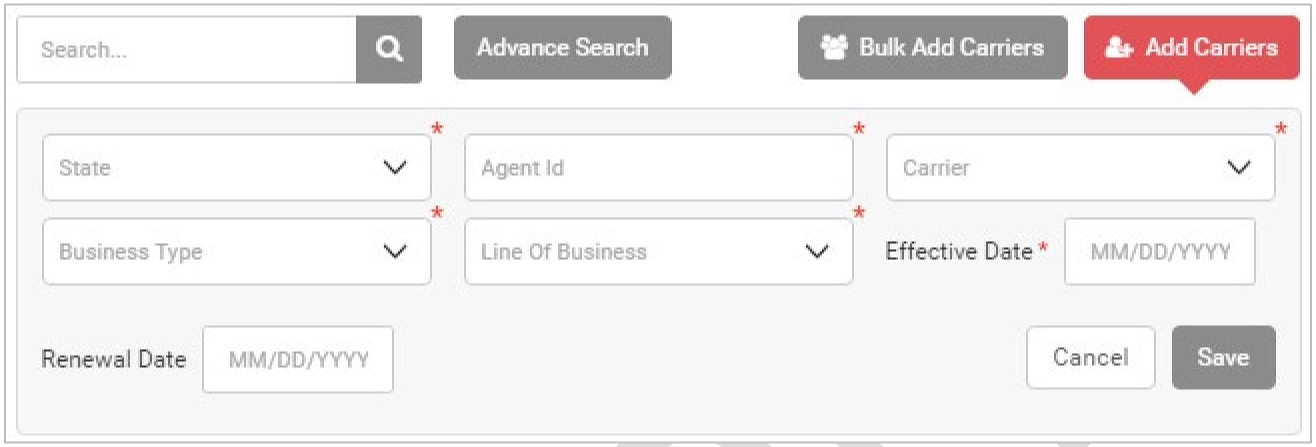
Field	Description
Line of Business	Select one of the following applicable Line of business from the advanced search: • Medical • Dental • Vision • Term Life • Dental, Vision and Hearing • Out of Pocket Protection • Term Life with Critical illness • Supplemental Health • Accidental Insurance • Short Term Medical • Final Expanse
Business Type	Select one of the following applicable business type: • Individual • Commercial SG
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: • Individual • Commercial SG
Line of Business	Yes	Select one of the following applicable Line of business from the advanced search: • Medical • Dental • Vision • Term Life • Dental, Vision and Hearing • Out of Pocket Protection • Term Life with Critical illness • Supplemental Health • Accidental Insurance • Short Term Medical • Final Expanse
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: • Individual • Commercial SG
Line of Business	Yes	Select one of the following applicable Line of business from the advanced search: • Medical • Dental • Vision • Term Life • Dental, Vision and Hearing • Out of Pocket Protection • Term Life with Critical illness • Supplemental Health • Accidental Insurance • Short Term Medical

Field	Mandatory	Description
		• Final Expanse
Effective Date from	Yes	Specify the "**Effective Date From**" by clicking calendar field.
Renewal Date	No	Specify the "Renewal Date" by clicking the calendar field.
Save		Click the **Save** button to save the appointment.
Cancel		Click the **Cancel** 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

Notes

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BE Agent Guide – V3.0 (10 February 2022)

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