Broker User Manual

Version 2.0

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my Arkansas Insurance
Official Marketplace for Health Insurance

Copyright Information

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1: Acronyms

The Acronyms table provides a list of all acronyms included in the deliverable, along with the literal translation and definition.

Acronym	Definition
EIN	Employer Identification Number
FTE	Full Time Equivalent
QHP	Qualified Health Plan
SHOP	Small Business Health Options Program
SSN	Social Security Number
TIN	Tax Identification Number

Table 1: Acronyms

2: Introduction

A broker is responsible for selling small group health insurance policies to employers and employees on and off the Agent Portal. A broker must register with My Arkansas Insurance and have a license number to track sales and commissions. All licensed life and health agents must be licensed as Exchange Producers in order to sell SHOP plans.

2.1: Purpose

This user manual describes how brokers use the Agent Portal to manage their prospects and customers lists, apply for health coverage on the Agent Portal on behalf of customers, search plans and share proposals with customers, and/or manage Broker Admin to work on their behalf.

The key topics included in this guide are:

- Managing the Agent Portal Account
- Managing Clients
- Managing Proposals
- Enrolling Employees

2.2: Audience

The target audience for this manual is Brokers who use the Agent Portal to manage Broker Admin and clients.

2.3: Introduction to Agent Portal

The Agent Portal is an easy-to-use online Portal that allows Brokers and Broker Admin to sell small group health insurance policies to employer clients.

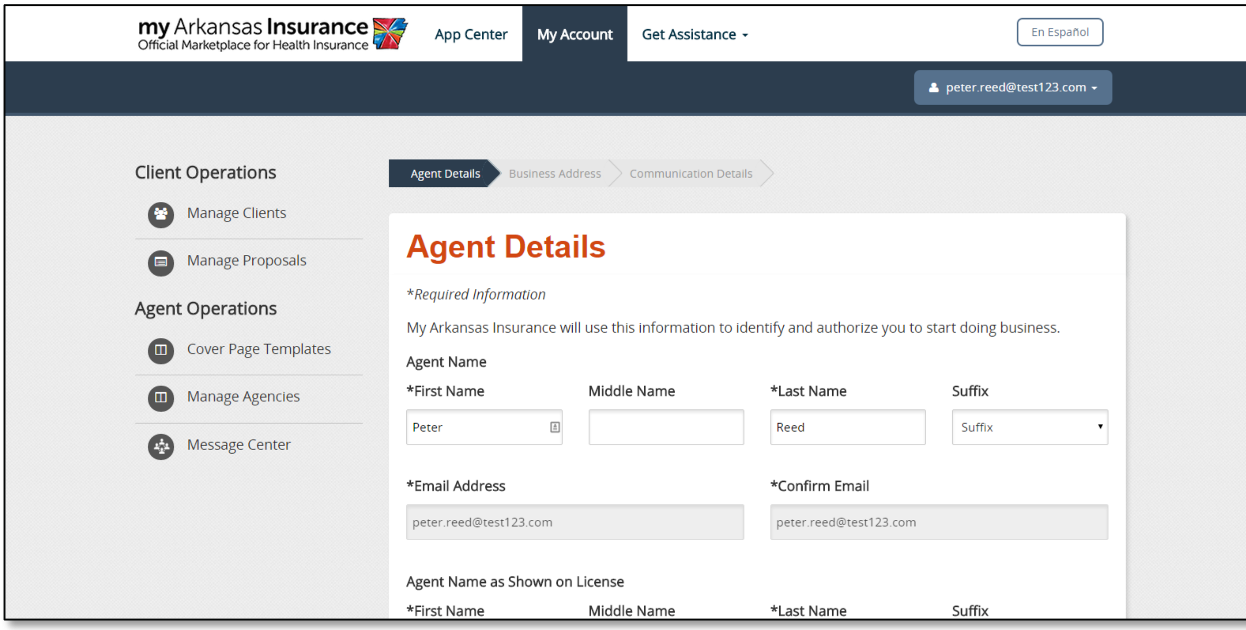


Figure 1: Agent Portal Landing page

2.3.1: Navigating the Agent Portal

The following table explains how to navigate in the Agent Portal:

App Center	Language	My Account	Learn More
Click the **Apps Center** tab to be directed to the Manage Clients Introduction page. ➢	Click the **Language(s)** icon to view the Agent Portal in your preferred language.	Click **My Account** to view account details, including Agent Details, Business Address, and Communications Details	Click **Get Assistance** to be directed to the Help Center.

Table 2: Agent Portal Navigation Options

3: User Account Management

3.1: Create a User Account

Creating a user account enables you to sign in to the Agent Portal.

A broker can create an account and register on the Agent Portal to assist state residents with their health insurance related questions and sell group health insurance policies to employers and employees.

Registered users can use their login credentials to sign in to the Agent Portal. A registered user can sign in and manage clients and Broker Admin, determine client eligibility, apply for health insurance coverage on behalf of customers, search plans, share proposals with customers, and enroll employees.

To create an account on the Agent Portal:

1. Go to www.myarinsurance.com.
2. Click **Manage SHOP** in the upper right-hand corner.
3. Click Agents/Brokers.

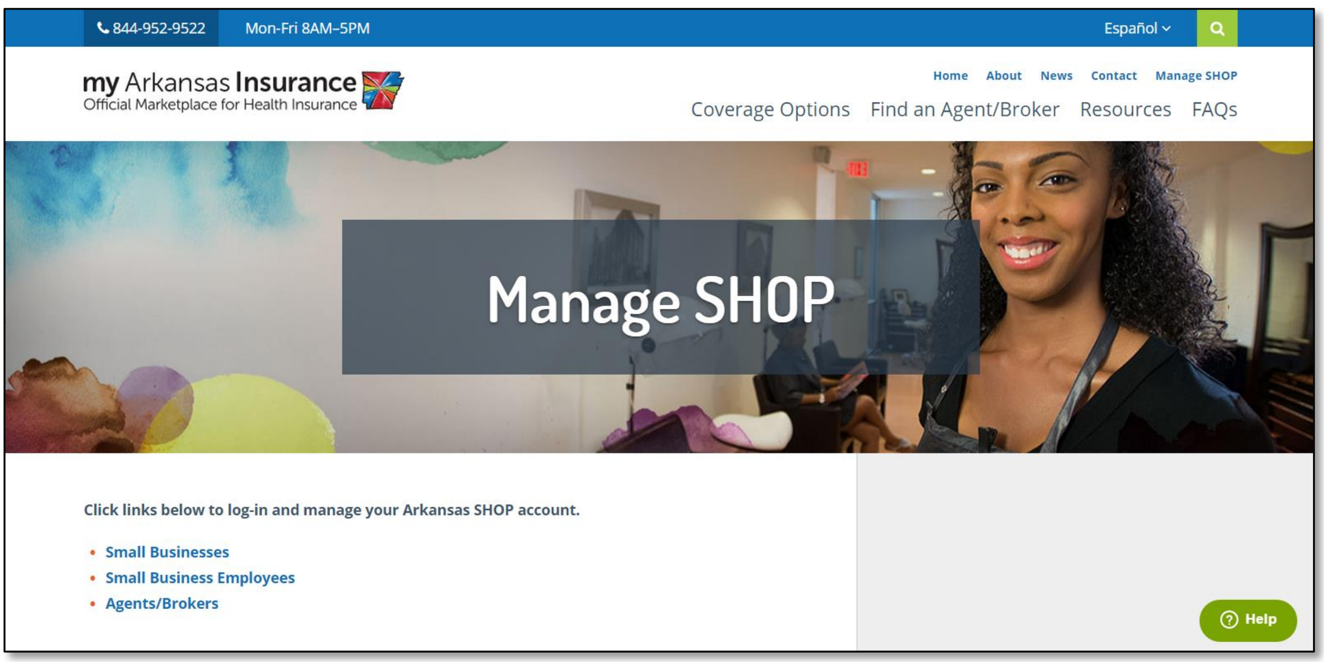
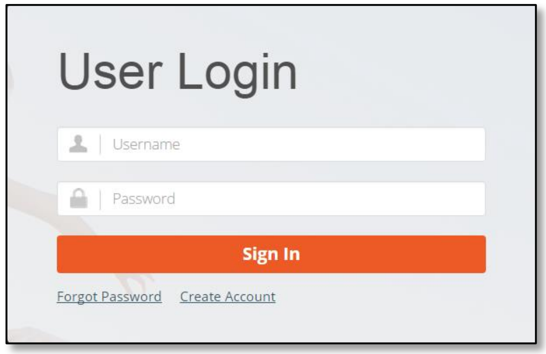


Figure 2. My Arkansas Insurance page

4. Click **Create Account**.



5. In the First Name field, enter your name.
6. In the Last Name field, enter your last name.
7. In the Email field, enter your email address.
8. In the Username field, enter a username. You have the option of using your email as a username.
9. In the Password field, enter your password.
10. In the Confirm Password field, enter your password again.
11. Select the “I agree and accept to the Privacy Policy statements” check box.
12. Click **Save**.
13. From the Security Question list, select your security questions.
14. In the Answer field, enter your respective answers for the security questions.
15. Click **Register**.

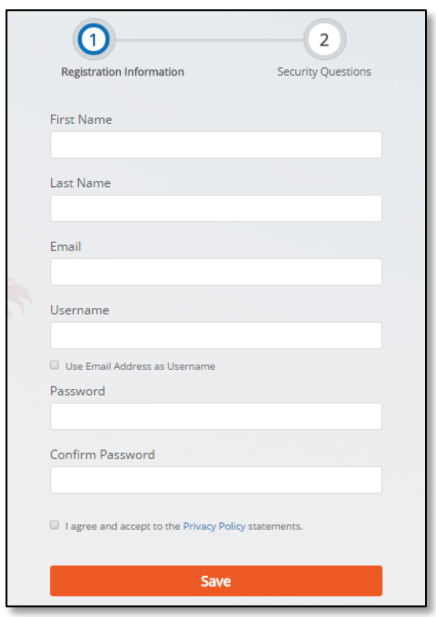


Figure 3. Create Profile page

Upon successful system authentication, you will be directed to the User Login page.

3.2: Login to the Agent Portal

1. In the Username field, enter Username.
2. In the Password field, enter Password.
3. Click Sign In.

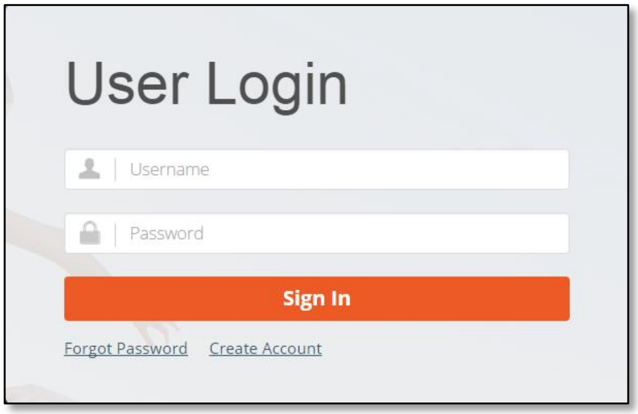


Figure 4. User Login page

3.3: Complete Your Agent Profile

After registration, the Agent Portal stores the details that you entered when you registered. You must complete your profile to perform activities for clients.

You are asked to provide the following information:

- Agent Details
- Business Address
- Communication Details

When you complete each section and click **Save and Continue,** the next section will display automatically. All fields marked with an asterisk (*) are mandatory.

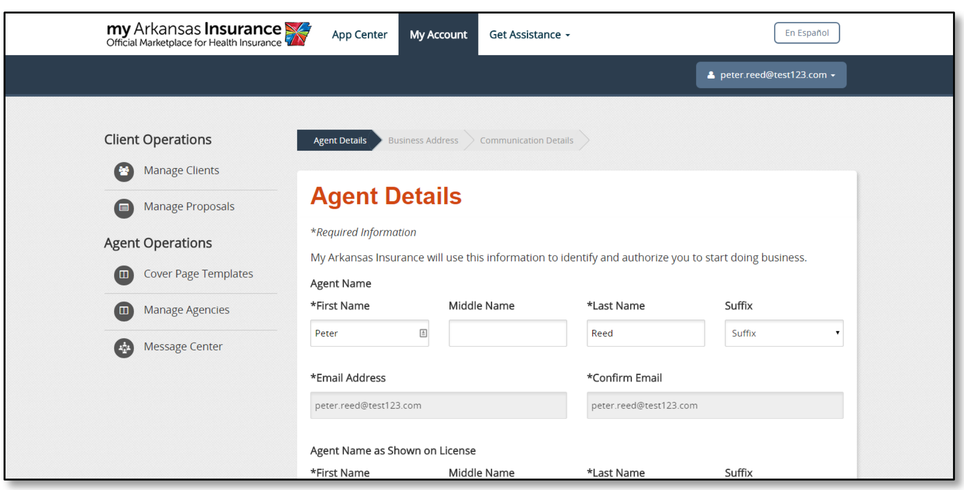


Figure 5. Agent Details page

3.3.1: Add Agent Details

The Agent Details page enables you to provide your agent and agency information.

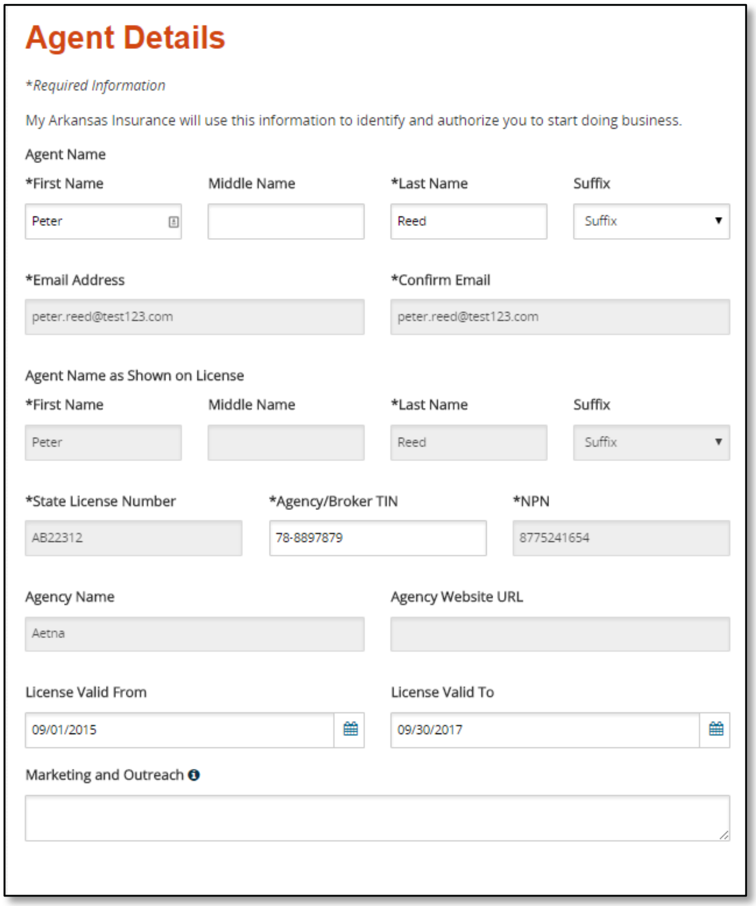


Figure 6. Agent Details

On the **Agent Details page**, enter the following information:

1. Name
2. Email Address
3. Agent Name as Shown on License
4. State License Number
5. Agency/Broker TIN
6. NPN
7. Agency Name
8. Agency Website URL
9. License Valid From and To Dates
10. Marketing and Outreach Information
11. Click **Save**.

3.3.2: Add Your Business Address

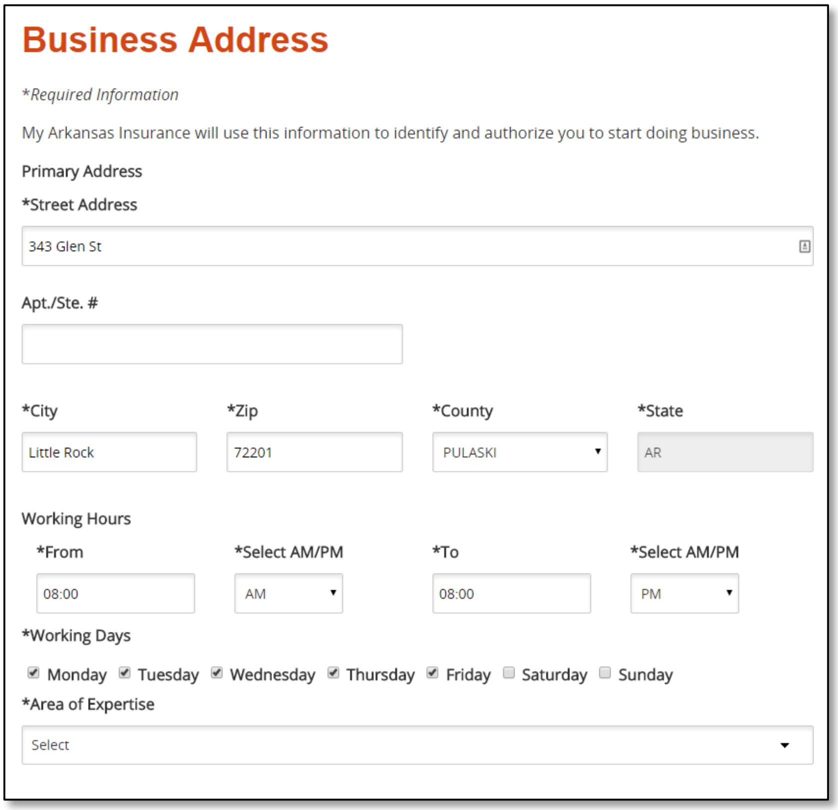


Figure 7. Business Address page

On the **Business Address** page, enter the following information:

1. Primary Street Address
2. Working Hours
3. Working Days
4. Area of Expertise

Click **Save**.

3.3.3: Add Your Communication Details

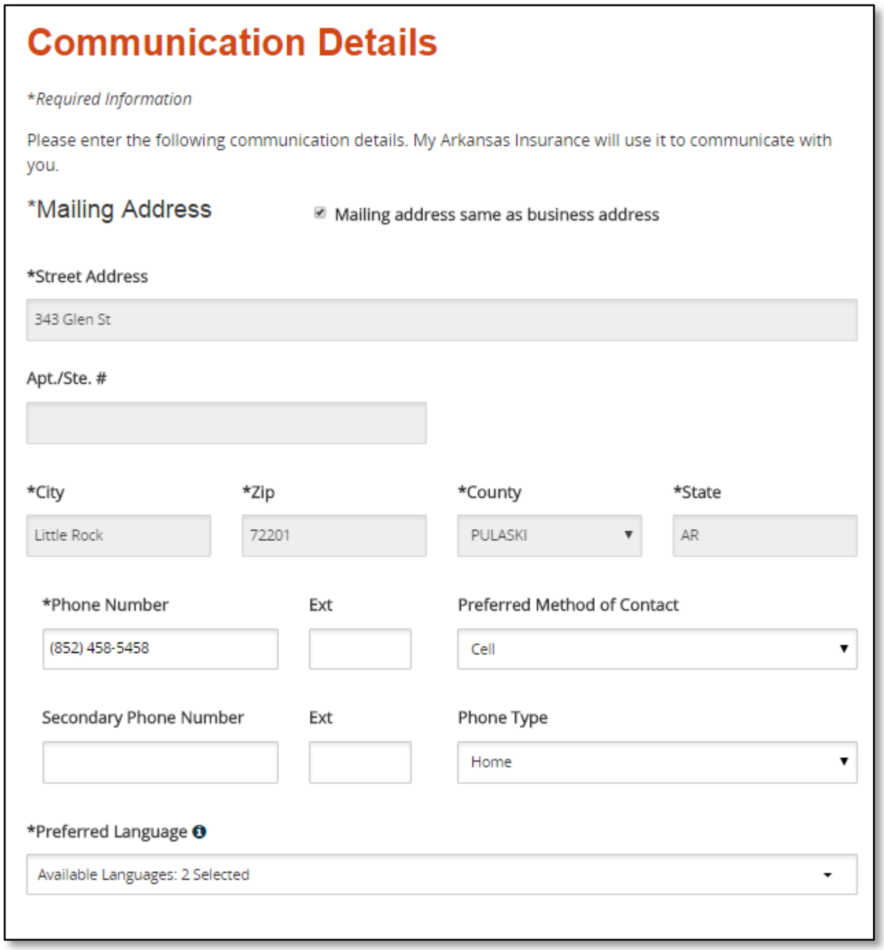


Figure 8. Communication Details

On the **Communication Details** page, enter the following information:

- Mailing Address
- Primary Contact Number
- Secondary Contact Number
- Preferred Language

Click **Save**.

3.4: Update Account Details

Once you have completed the Agent Details sections, your user account information is stored by the Agent Portal. You can review your user profile information in the My Account section.

To update your user account information, you must:

1. Sign in to the Agent Portal using your username and password created during registration.
2. Select your **My Account** from the top Navigation menu.
3. Edit profile information, if needed.

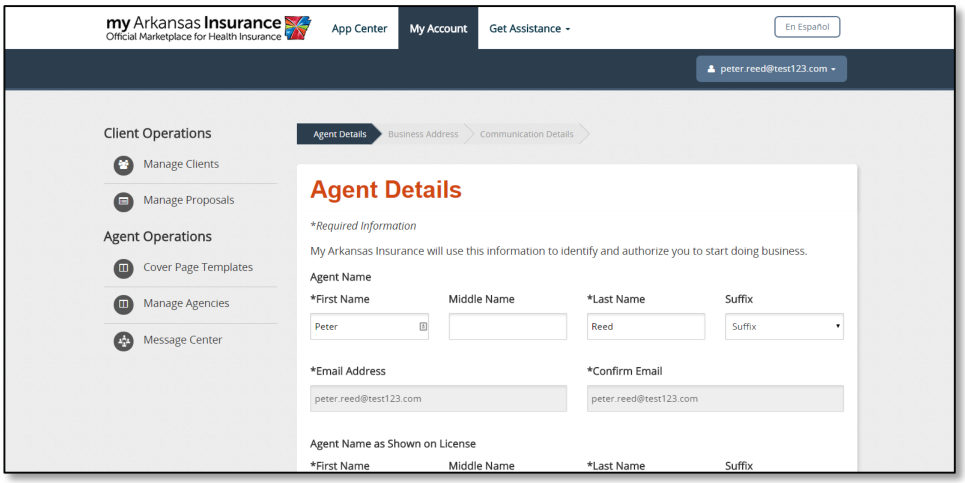


Figure 9. My Account menu

3.4.1: Changing Security Questions

You can use the **Change Security Questions** page to change the security questions and answers you provided during registration. You will be prompted to answer the security questions if you forget your password and need to reset it.

To update your security information:

1. Sign into the Agent Portal using your username and password created during registration.
2. Select your **Username** in the top right-hand corner.
3. Click **Change Password**.
4. Click **Change Security Questions.**
5. In the Security Question 1 field, select a question.
6. In the Security Answer 1 field, enter an answer.
7. In the Security Question 2 field, select a question.
8. In the Security Answer 2 field, enter an answer.
9. In the Security Question 3 field, select a question.
10. In the Security Answer 3 field, enter an answer.
11. Click **Save and Logout**.

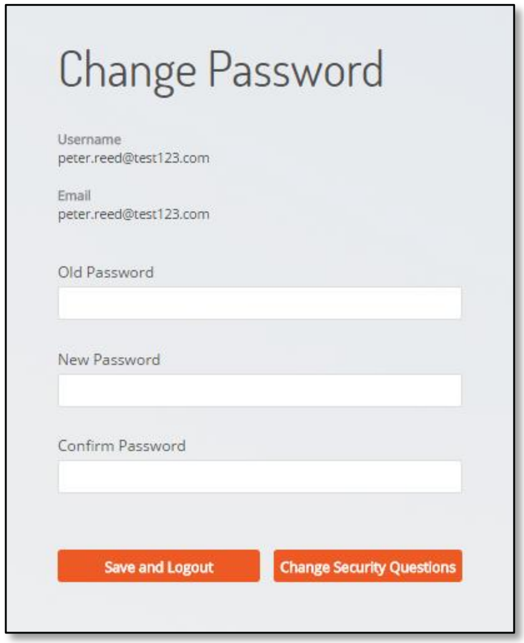


Figure 10. Change Password

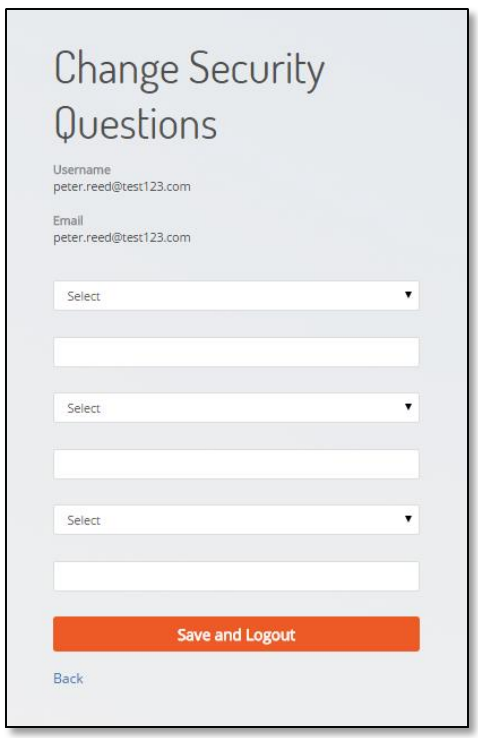


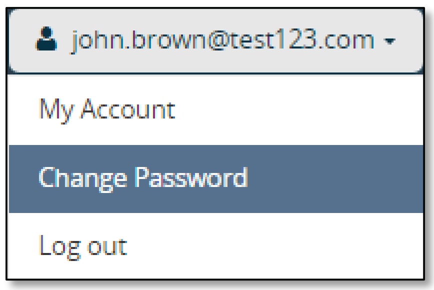
Figure 11. Change Security Questions

3.4.2: Resetting Your Password

You can use the Password page to change or reset your password.

To reset your password:

1. Sign into the Agent Portal using your username and password created during registration.
2. Select your **Username** in the top right-hand corner.
3. Click **Change Password**.



4: Managing Clients

4.1: Introduction

The Manage Clients section of the Agent Portal enables you to manage your clients and perform the following activities:

- Add/Update Clients
- Send and manage plan proposals
- File an eligibility application and enrollment on behalf of your clients
- Enrollment employees
- Manage payments

To manage your employer clients, click **Manage Clients** from the left navigation menu.

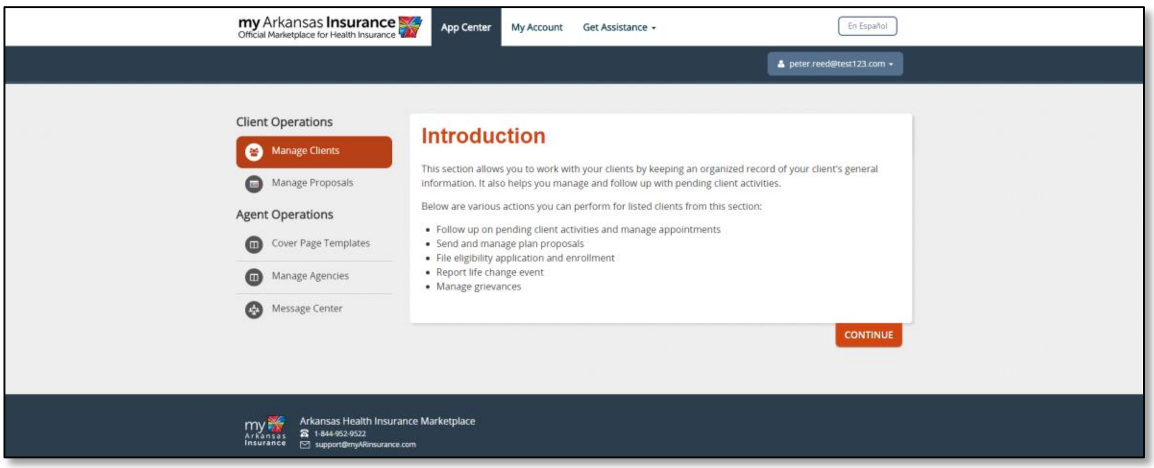


Figure 12: Manage Clients - Introduction page

4.2: Managing Clients

The Clients page enables you keep an organized record of your client's general information and helps you to manage and follow up with pending client activities.

To manage clients, you must first perform one of the following activities:

- Search for a client (with a profile on the Employer Portal)
- Add a new client (without a profile on the Employer Portal)

4.2.1: Searching for a Client

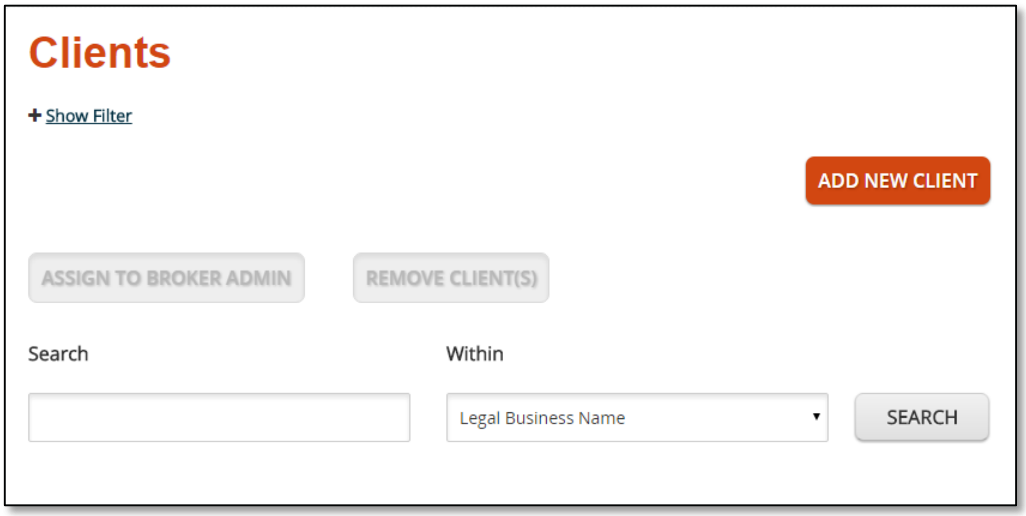


Figure 13: Clients page

To **search** a client:

1. On the Clients page, click **Add New Client.**
2. On the Search Client page, select the **Search New Client** radio button.
3. Enter either the client's **Account Number or Email Address**.
4. Click **Search**.

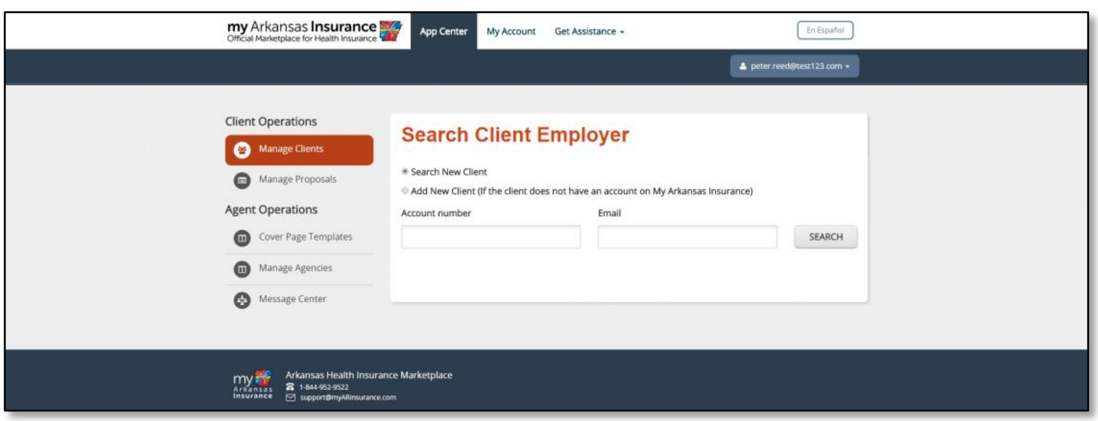


Figure 14: Search Client Employer page

5. Click **Select Client** next to the client you wish to manage.
6. On the Review Client page, click **Add Client**.

To **add** a client:

1. On the Clients page, click **Add New Client**.
2. On the Search Client page, select **Add New Client** radio button.
3. Click **Search.**

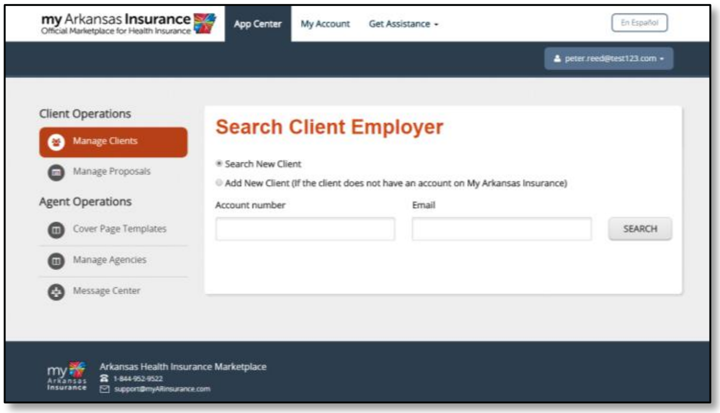


Figure 15: Search Client Employer page

4. Enter basic employer information:
   - Name
   - Company Name
   - Contact Address
   - Email
   - Preferred Language
   - Phone Number

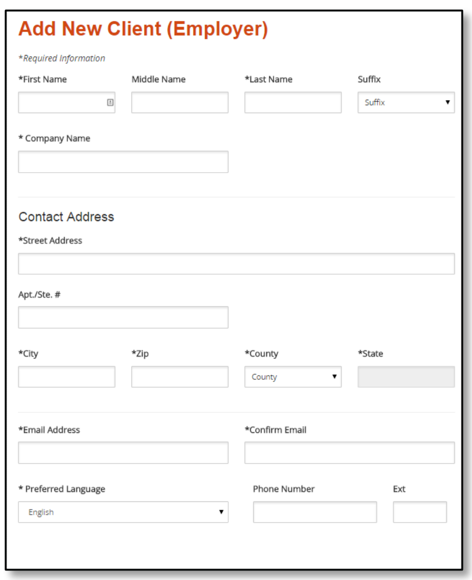


Figure 16: Add New Client (Employer) page

After searching or adding a client to your client list you can request authorization or manage proposals.

4.2.2: Assigning Client to Broker Admin

To assign clients to Broker Admin:

1. On the **Clients** page, click the checkbox next to the client and click **Assign to Broker Admin**.

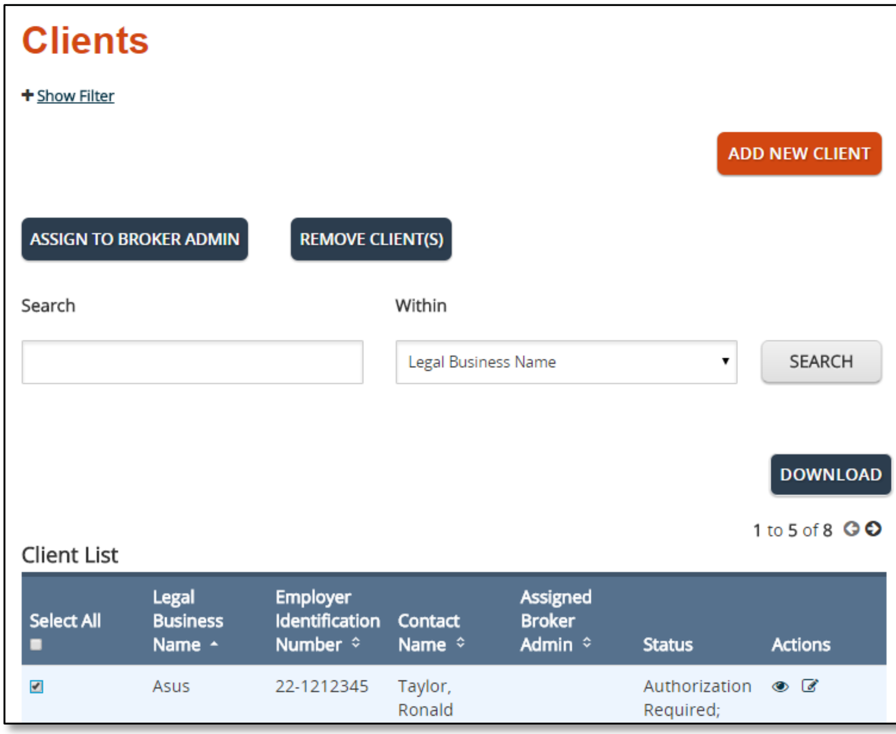


Figure 17: Clients page

4.2.3: Removing Client

To remove a client from your account:

1. On the Clients page, select the client check box.
2. Click **Remove**.

4.2.4: Viewing Client Details

To view client details:

1. On the Clients page, under the Actions column, click **View Client Details**.
2. On the Review Details (Employer) page, view your client's details.
3. Click **Previous** to return to the Clients page.

Figure 18: Review Details page

4.2.5: Editing Client Details

To edit client details:

1. On the Clients page, under the **Actions** column, click **Edit Client Details**.
2. On the Edit Client (Employer) page, update the client information.

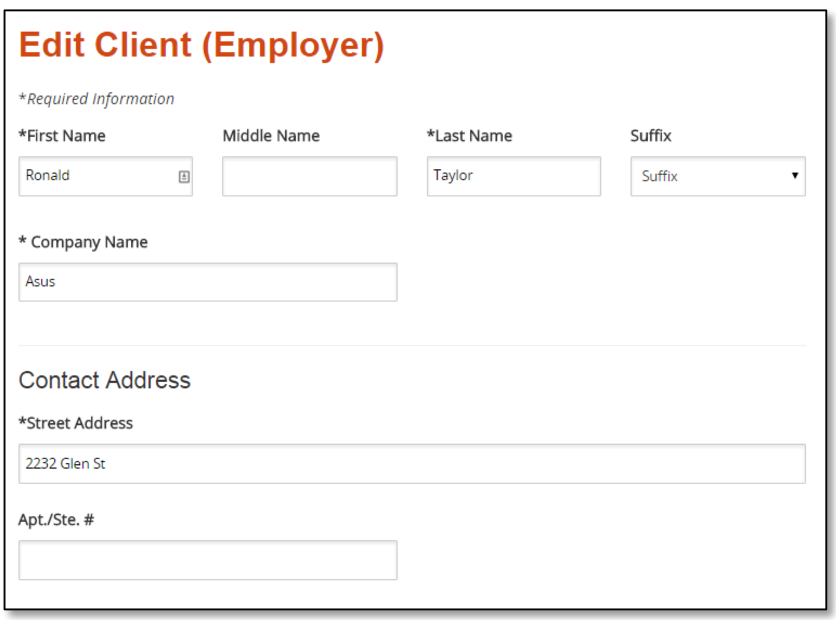


Figure 19: Edit Client (Employer) page

3. Click **Continue**.
4. On the Review Details (Employer) page, review the details and click **Submit**.

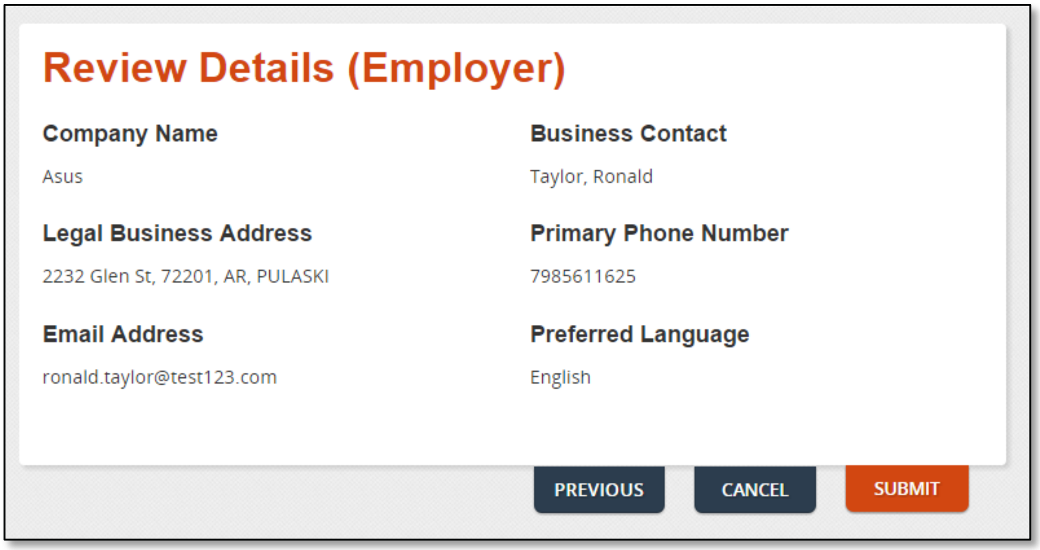


Figure 20: Review Details (Employer) page

5: Managing Client Operations

The Client Operations section of the Agent Portal enables you to perform the following activities for your employer clients:

- Create Proposals
- Manage Authorization
- Setup Enrollment
- Submit Enrollment
- Manage Employees
- Manage Profile
- Manage Payments

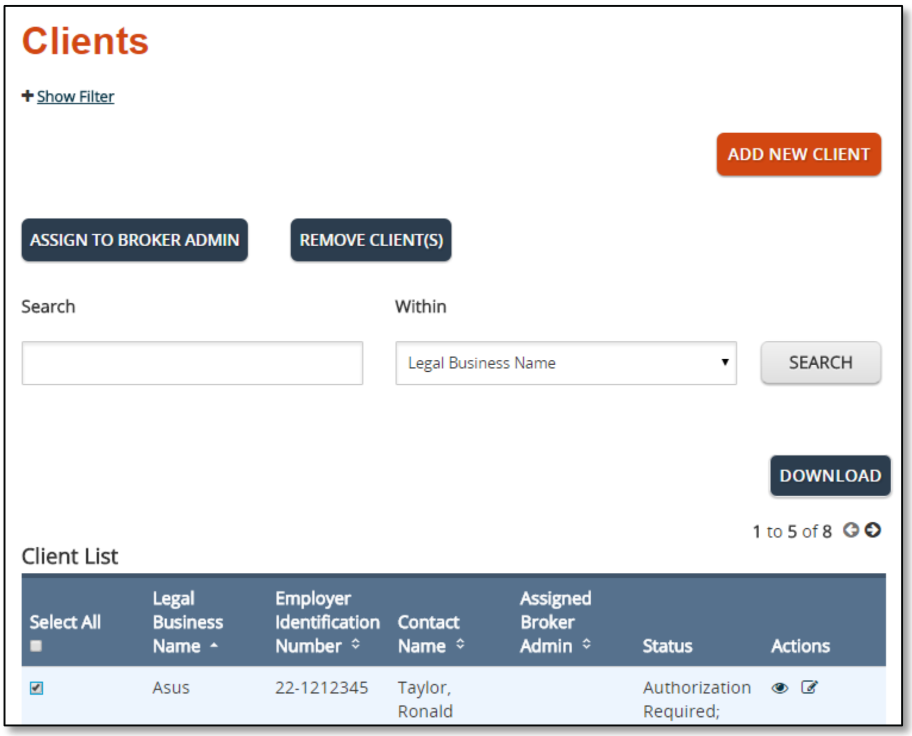


Figure 21: Client Operations page

5.1: Creating Proposals

The Proposal List page enables you to select a proposal to send to employer's as an enrollment offer. Clients can view plan and cost details per employee.

There are eight steps to creating a proposal:

- Enter Proposal Details
- Enter Employee Details
- Select Plan Options
- Define Contributions
- Select Plans
- Add Documents
- Review Proposal
- Save and Send Proposal

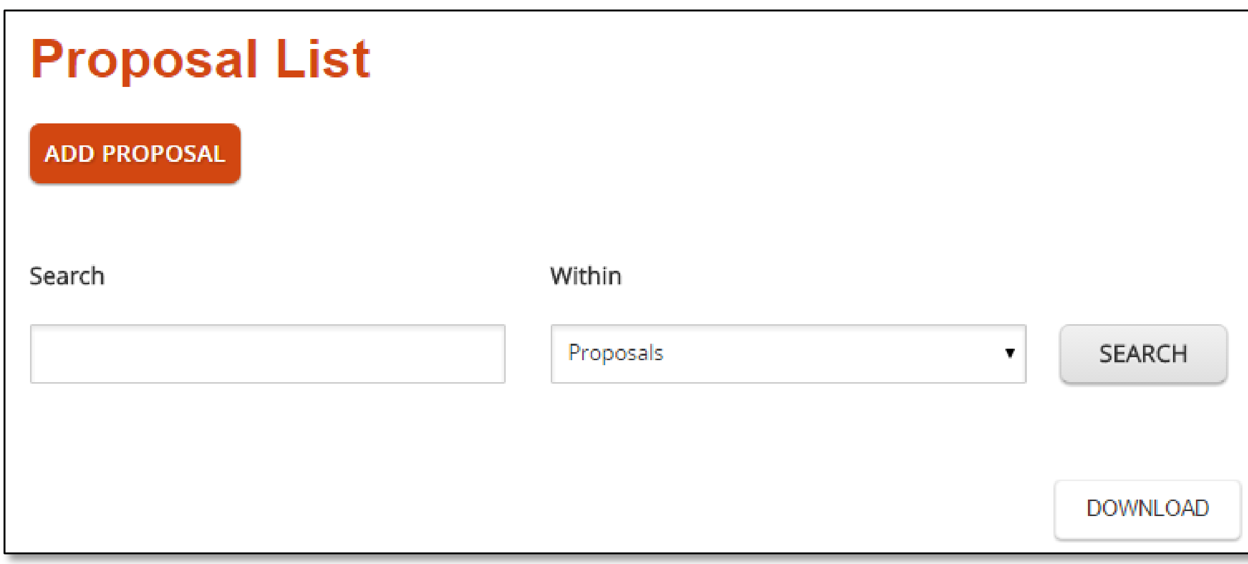


Figure 22: Proposal List page

5.1.1: Enter Proposal Details

To enter proposal details:

1. Click **View Client Details** from the Actions column next to the client.
2. Click **Manage Proposals** from the left navigation menu.
3. Click **Create Proposal**.
4. Enter **Proposal Name**.
5. Enter **Proposal Description**.
6. Enter **Effective Date**.
7. Click **Continue**.

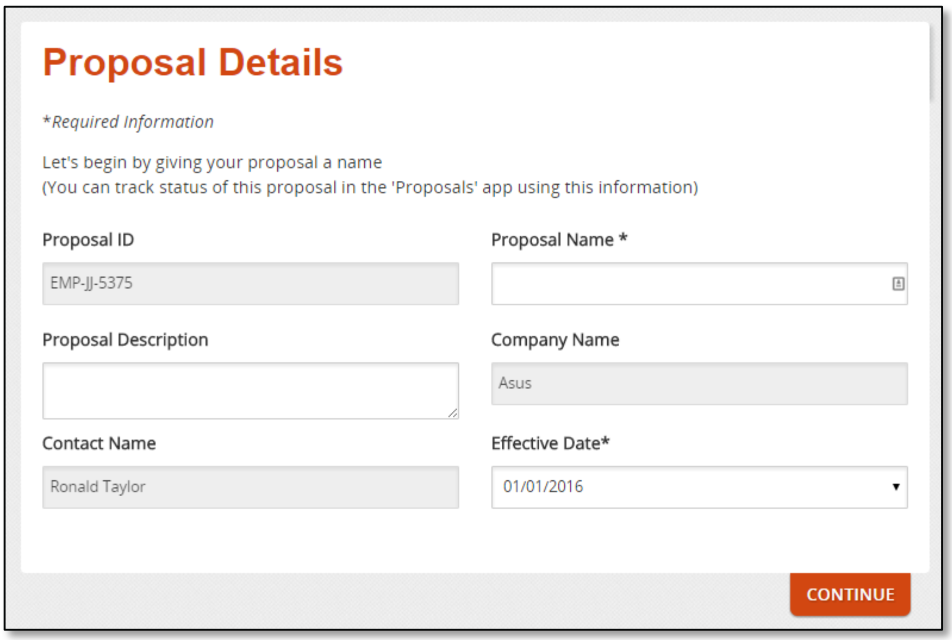


Figure 23: Proposal Details

5.1.2: Enter Employee Details

On the **Employee Details** page**:**

1. Download the **Employee Roster Template**.
2. Complete the **Employee Roster in Excel**.
3. Upload **Employee Roster**.
4. Click **Continue**.

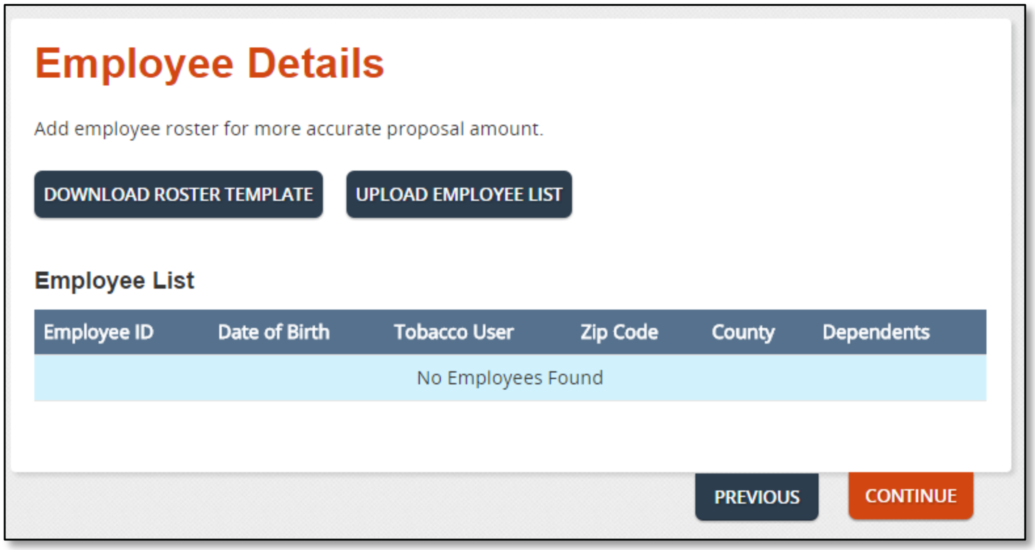


Figure 24: Employee Details

5.1.3: Selecting Plan Benefits

The Plan Benefits page enables you to select the types of health plans for the enrollment offer. The plan benefits you select on this page will filter the plans that are rolled out to the employees on the enrollment offer.

There are two options when selecting plan benefits:

- Option One: Employees can select plans in one metal tier from all carriers.
- Option Two: Employees can select one plan from one carrier.

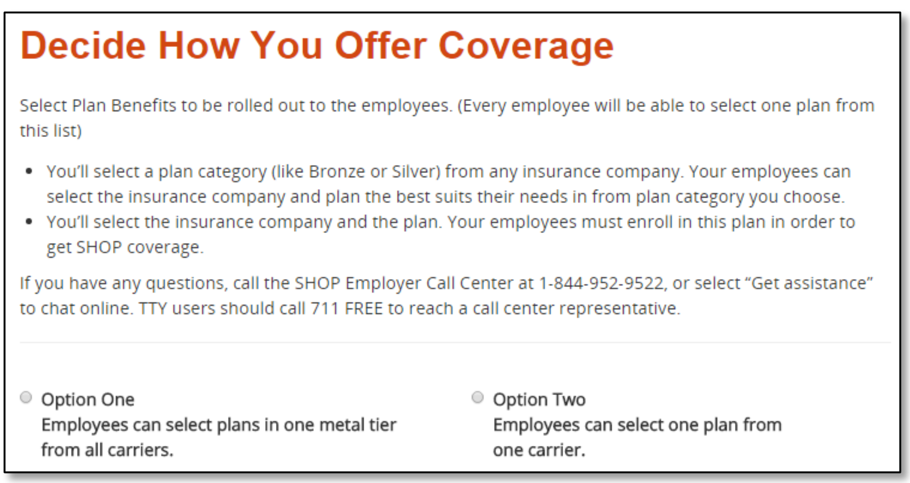


Figure 25: Decide How You Offer Coverage

5.1.4: Defining Contribution

The Define Contribution page enables you to define the percentage or maximum dollar amount that the employer wants to contribute towards the employees' health plans, as a premium for employees and their dependents. To qualify for tax credits, the employer must pay at least 50% of your full-time employees' premium costs.

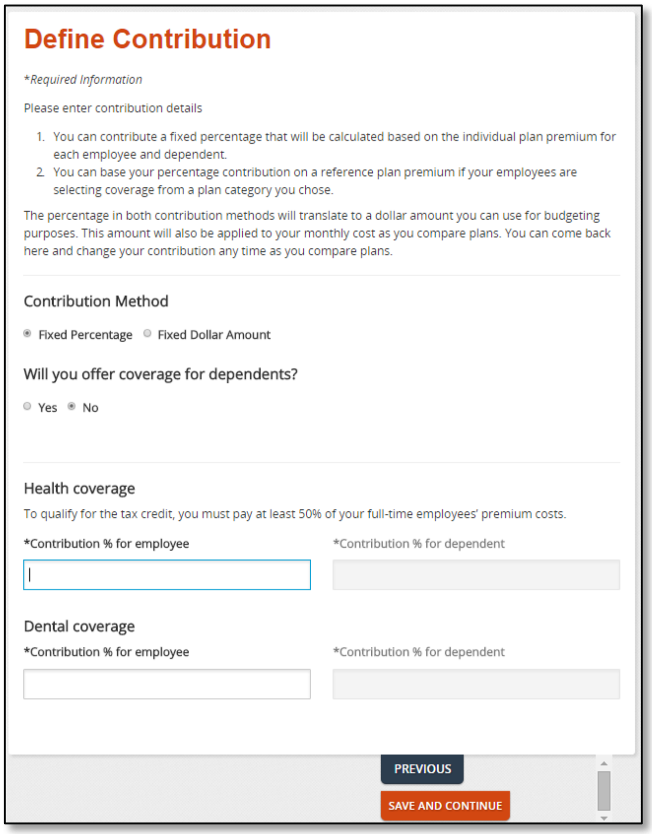


Figure 26: Define Contribution page

To define employer contribution towards the employee's health insurance premium:

1. Select **Fixed Percentage** or **Fixed Dollar Amount** to specify your contribution type.
2. Select **Yes** or **No** to specify if you want to contribute for the dependents of the employees.
3. Enter your contribution for medical and dental insurance in the specific fields for both employees and their dependents, if applicable.
4. Click **Save and Continue**.

5.1.5: Select Plans

The Select Plans page enables you to select the plans for the enrollment offer to be rolled out to the employees. The premium rates mentioned for the plan on the Select Plans page are monthly employer contributions.

Each standalone plan may have associated entities. Entities are add-on insurance plans that cover health-related services that are not typically covered by the selected health plan.

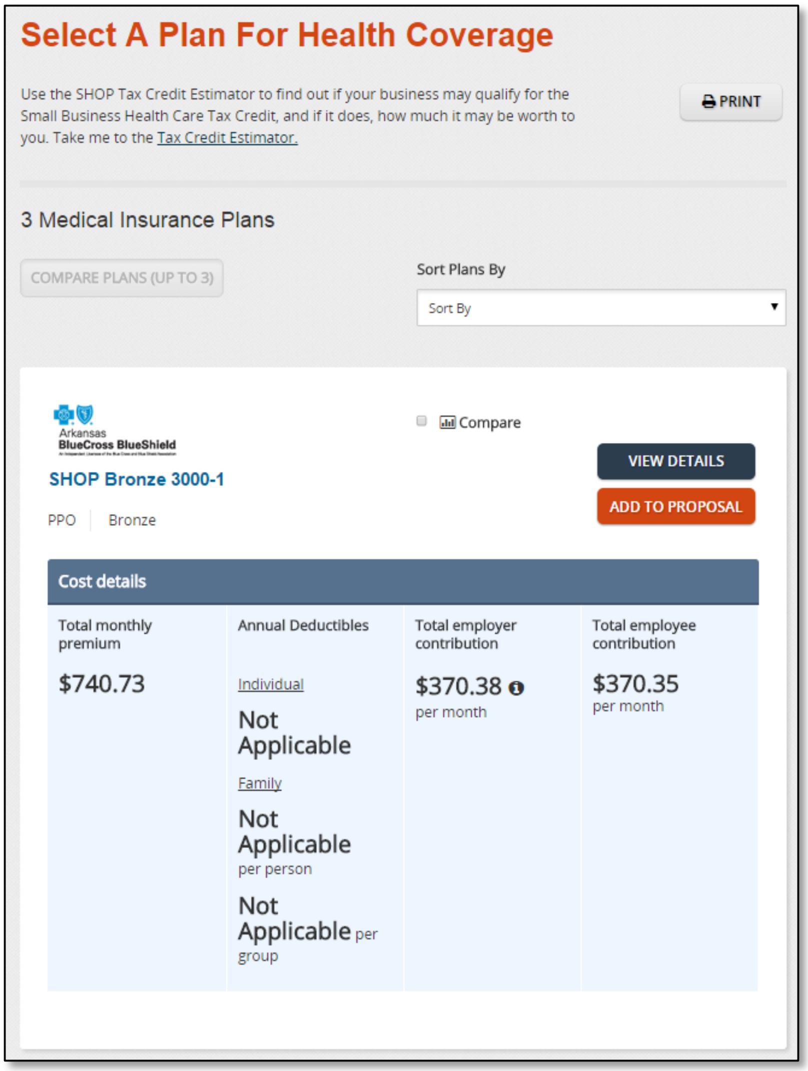


Figure 27: Select A Plan For Health Coverage page

On the Select A Plan For Health Coverage page, you can:

- Add to proposal
- Sort plans
- Filter plans
- Compare plans
- View plan details

5.1.5.1: Adding to Proposal

To add plans to proposal:

1. On the **Select A Plan For Health Coverage** page, click **Add to Proposal.**

2. Click **Continue**.

5.1.5.2: Sorting Plans

On the **Select A Plan For Health Coverage** page, you can sort the available plans to view plans matching your preference.

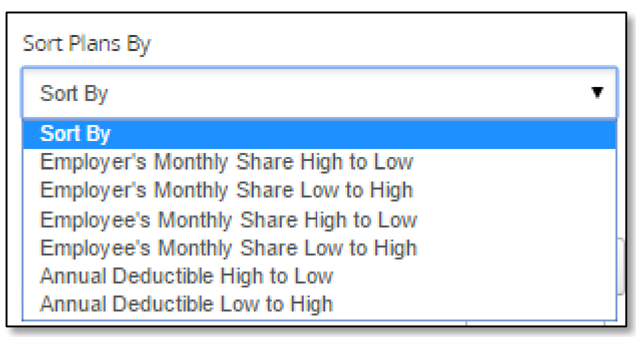


Figure 28: Sort Plans By Section

5.1.5.3: Filtering Plans

On the **Select A Plan For Health Coverage** page, use the filter option to view plans matching your filter criteria

To filter plans:

1. On the **Select A Plan For Health Coverage** page, click **Accessible Filters** on the left panel to expand or collapse the Contribution filtering list.

You can narrow down the accessible filters using the following filter options:

- Estimated Employer Contribution (minimum and maximum)
- Estimated Employee Contribution (minimum and maximum)
- Yearly Deductible (per employee) (minimum and maximum)
- Yearly Deductible (per family) (minimum and maximum)

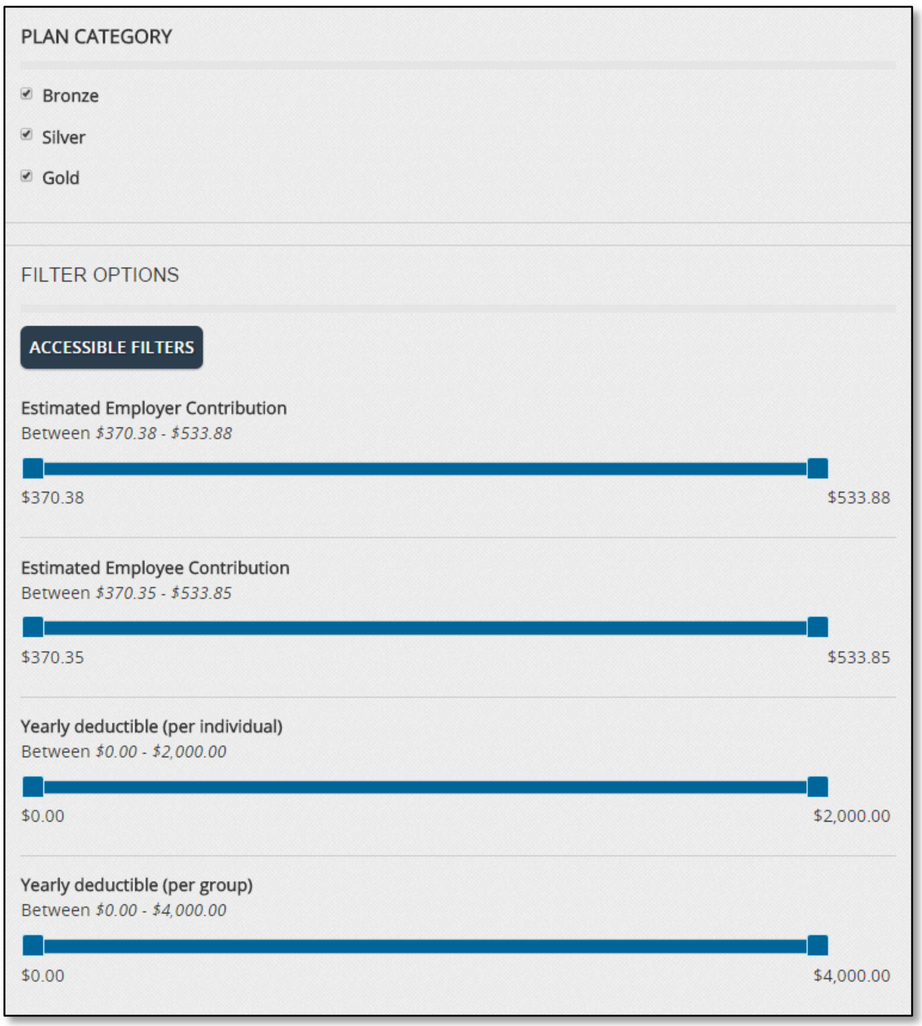


Figure 29: Filter Section

5.1.5.4: Comparing Plans

The Compare Plan page enables you to compare two or three different plans by displaying the plan details in a side-by-side comparison.

To compare plans:

1. On the **Select Plans Health Coverage** page, select the **Compare** check box for the plans that you want to compare.
2. Click **Compare Plans**.
   - The Compare Plans page displays the selected plans in a side-by-side comparison

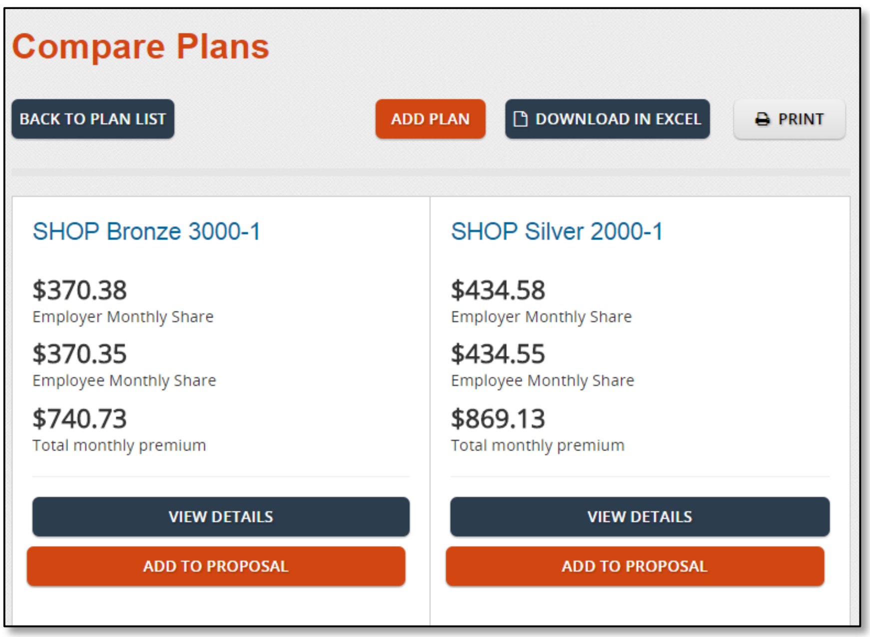


Figure 30: Compare Plans page

5.1.5.5: Viewing Plan Details

The Plan Details page enables you to review available plans in detail before making a selection. The Plan Details page displays the following information:

- Monthly Premium
- Issuer
- Plan Name
- Annual Deductible
- Metal Level
- Quality Rating
- Co-pays

- Coinsurance
- Deductibles

On the **Select Plans Health Coverage** page, click **View Details** for the preferred plan.

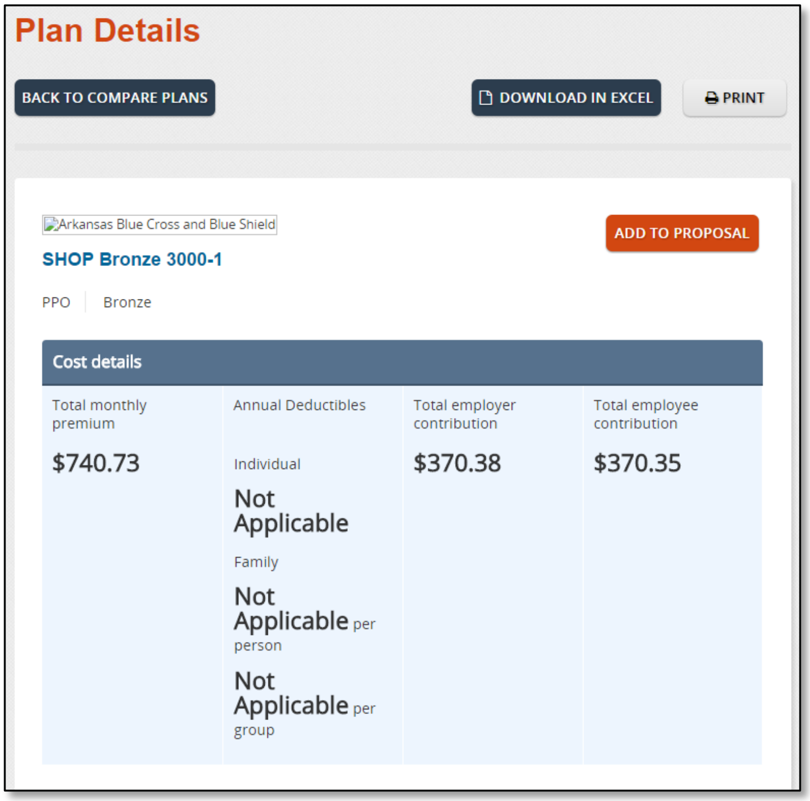


Figure 31: Plan Details page

5.1.6: Adding Documents

You can add documents to include in the proposal sent to clients.

On the **Document Selection** page:

1. Click the **Cover page** checkbox and select a template from the dropdown menu to include with the proposal.

See the Adding Cover page Templates section for more information on loading templates.

2. Select **Employee List (with cost details)**, to include with proposal.
3. Select **Employee Details**, to include a list of employees with proposal.
4. Click **Continue**.

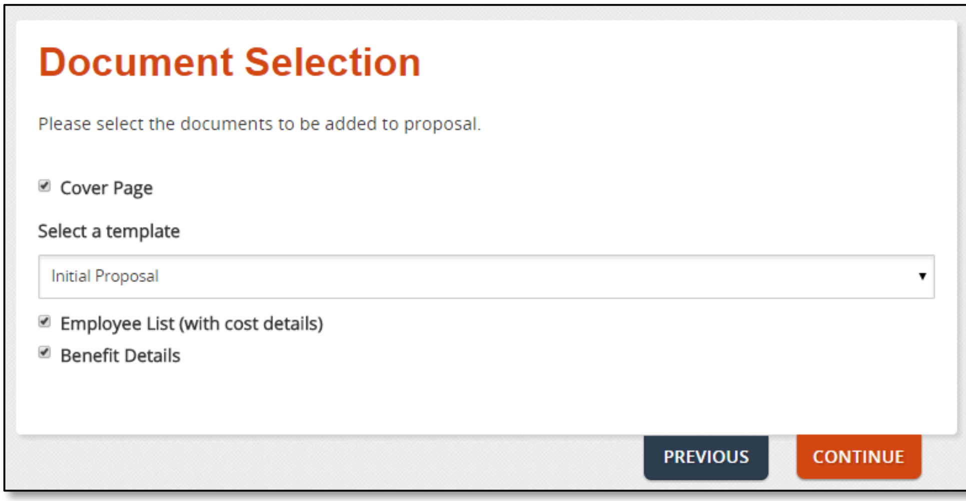


Figure 32: Document Selection page

5.1.7: Reviewing Proposal Details

The Review Proposal page, enables you to review the enrollment offer thoroughly after you have completed the plan selection for your client's employee group.

The enrollment details previously entered while setting up enrollment, and the selected plans added to your enrollment, are displayed on the Review Proposal page.

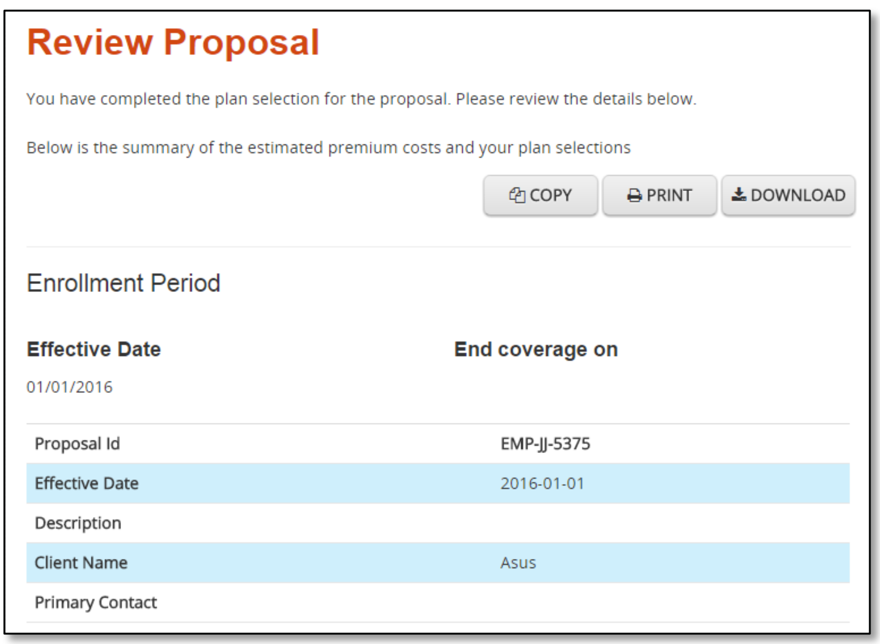


Figure 33: Review Proposal page

5.1.8: Sharing Proposals

The Share Proposal page, enables you to share the created proposal to the client. You can also save the proposal to revisit and complete the proposal. Once the proposal is complete, it cannot be edited.

You can enter a unique message and subject line specific to the client.

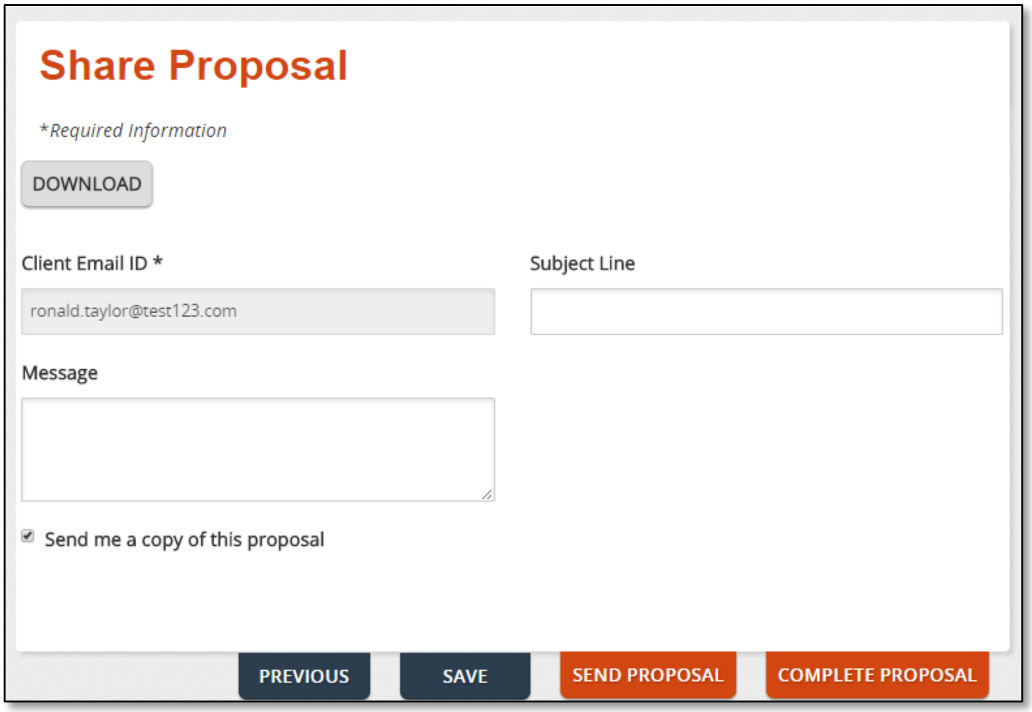


Figure 34: Share Proposal page

Once proposal is shared, a Proposal Sent message will display directing you to go to the Client Operations page for more options for the client.

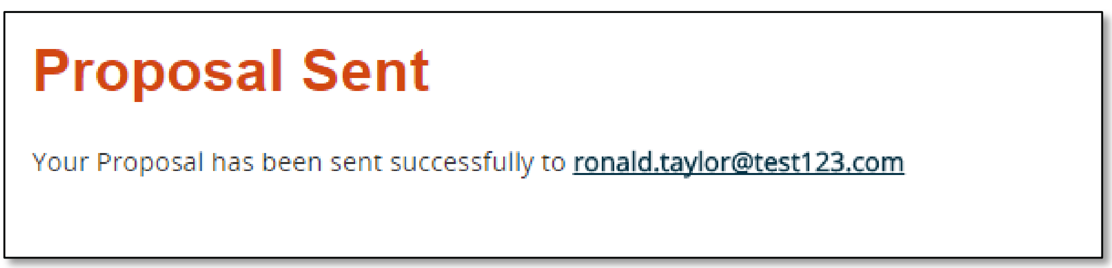


Figure 35: Proposal Sent page

5.2: Managing Authorization

The Authorization section enables you to manage authorization for your clients. It keeps an organized record of your client's authorization and enables you to view, approve, or reject authorizations.

In order to conduct business on behalf of a client, the broker must receive authorization.

There are two ways to receive authorization:

- Broker requests authorization from the client
- Client request authorization from the broker

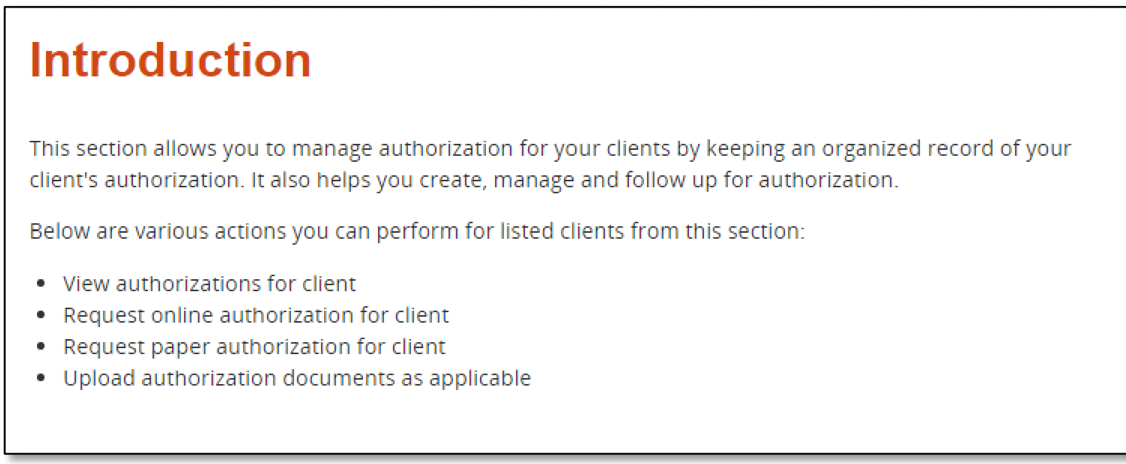


Figure 32: Authorization – Introduction page

5.2.1: Broker Requesting Authorization

For a Broker to request authorization from the client:

1. Click **Authorization** from the left navigation menu.
2. Click **Request Authorization**.

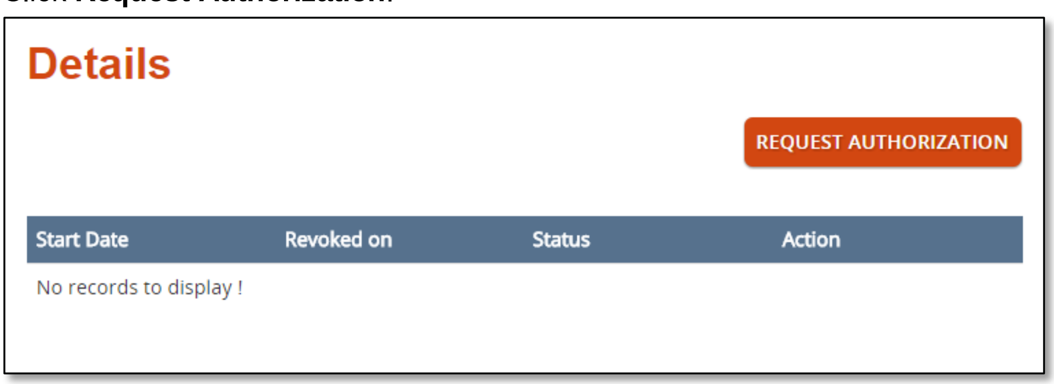


Figure 33: Authorization Details page

3. From the Authorization page, select either **Paper Authorization or Online Authorization**.
4. If you chose Paper Authorization, click **Upload Document** to upload a paper authorization.
5. Enter description (optional).
6. Click “I confirm that “Client” authorized me to create a profile and work on his or her behalf”.
7. Click **Continue**.

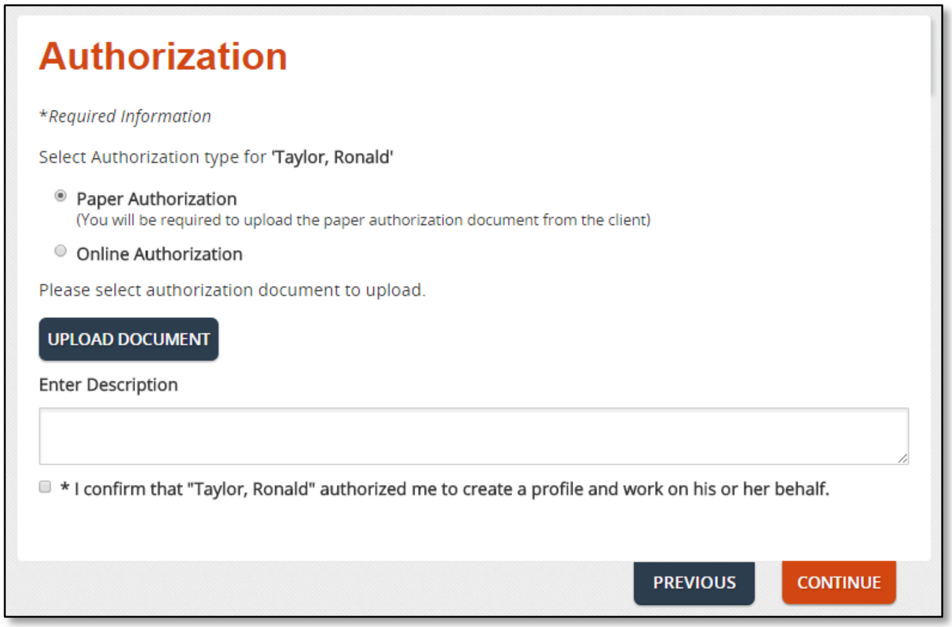


Figure 34: Authorization page

You’ll receive a confirmation message stating your request was sent to the client.

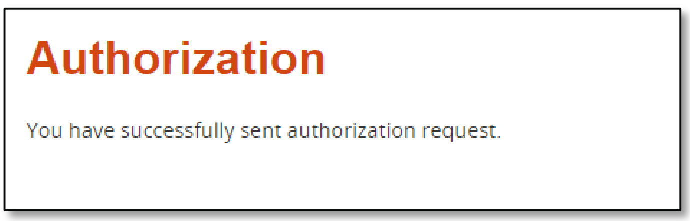


Figure 35: Authorization Confirmation page

5.2.2: Employer Approving Authorization Request

After the broker sends the request to the client, the client must approve the request through the Employer Portal.

For a Client to approve the request:

1. The client must login to the Employer Portal using a valid username and password.
2. Click **Brokers and proposals** from the left navigation menu.
3. Under the Pending agent/broker requests section, the client must click **Authorize** to approve the request.

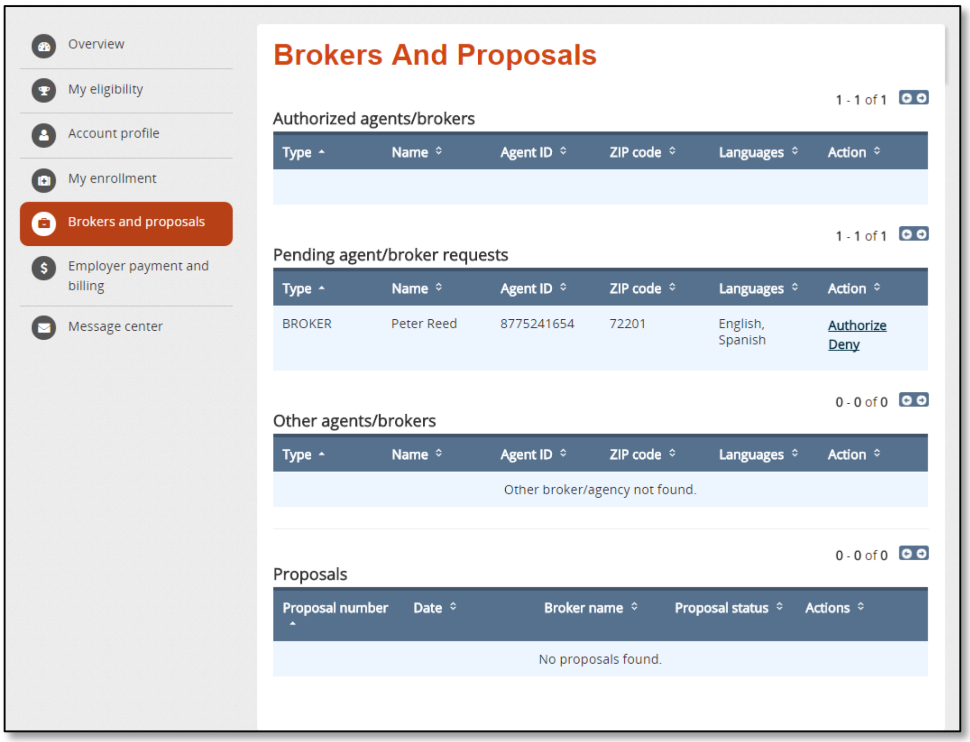


Figure 36: Brokers And Proposals page

Once a client authorizes a broker, the authorization status on the Agent Portal will change to Active. Once authorization is active, the broker can conduct business on behalf of the client.

5.2.3: Employer Requesting Authorization

A client can request authorization from a broker.

To request authorization:

1. The client must login to the Employer Portal using a valid username and password.
2. Click **Get Help** from the top navigation menu.
3. Click **Find Agent/Agency**.

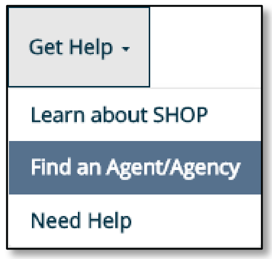


Figure 37: Get Help Menu

4. Enter the search criteria.
    a. Role
    b. Agent/Agency Name
    c. ZIP code
    d. Distance
    e. Language
    f. NPN
5. Click **Search**.
6. Click the **Agent Name**.

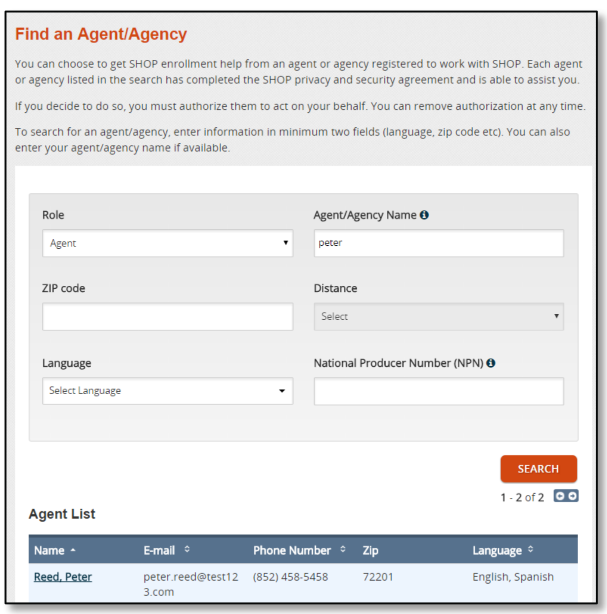


Figure 38: Find an Agent/Agency

7. From the Agent Details page, click **Authorize Broker**.

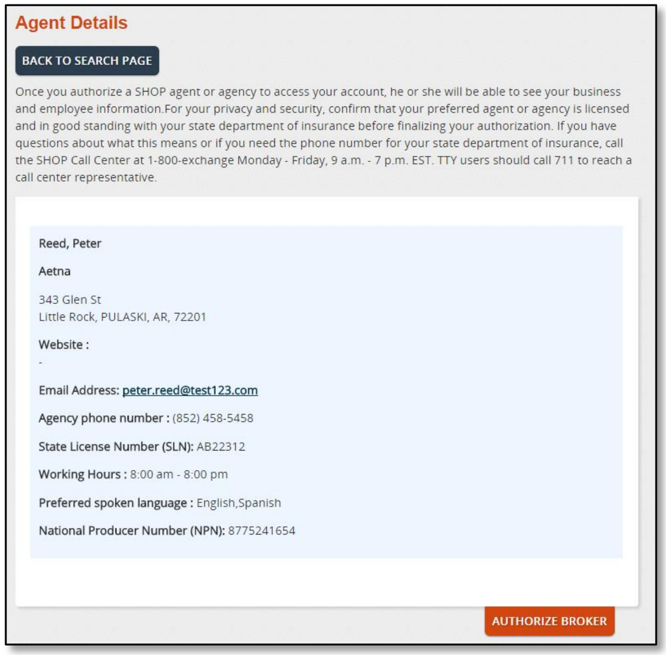


Figure 37: Agent Details page

5.2.4: Approving and Rejecting Authorization

After a client authorizes a broker, the broker must approve or reject the authorization.

To **approve** authorization:

1. On the Authorization Details page, click the **Approve** icon.
2. On the Accept Authorization popup, click **Confirm**.

To **reject** authorization:

1. On the Authorization Details page, click the **Reject** icon.
2. On the Reject Authorization popup, click **Confirm**.

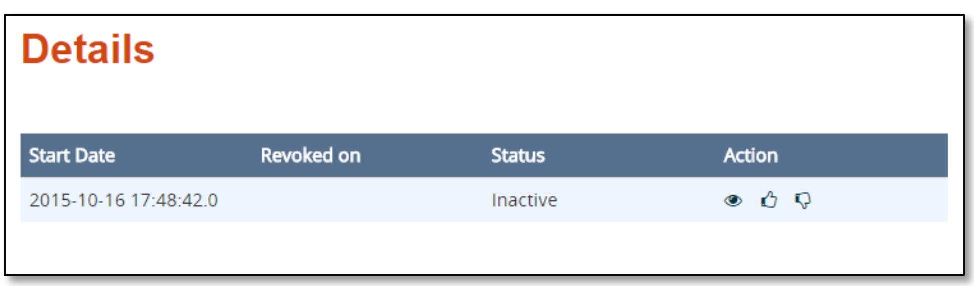


Figure 39: Authorization Details page

5.3: Managing Eligibility

The Manage Eligibility section enables you to check if your client qualifies to purchase plans on the SHOP marketplace.

To be eligible to purchase plans on the SHOP marketplace, your client must:

- Have a valid EIN
- Have a primary business address in the state of Arkansas
- Provide a self-attestation for the following required:
    - You are a small business with less than 100 employees.
    - You will offer coverage to all full time employees.
    - Your business should have at least one employee who isn’t owner or business partner.

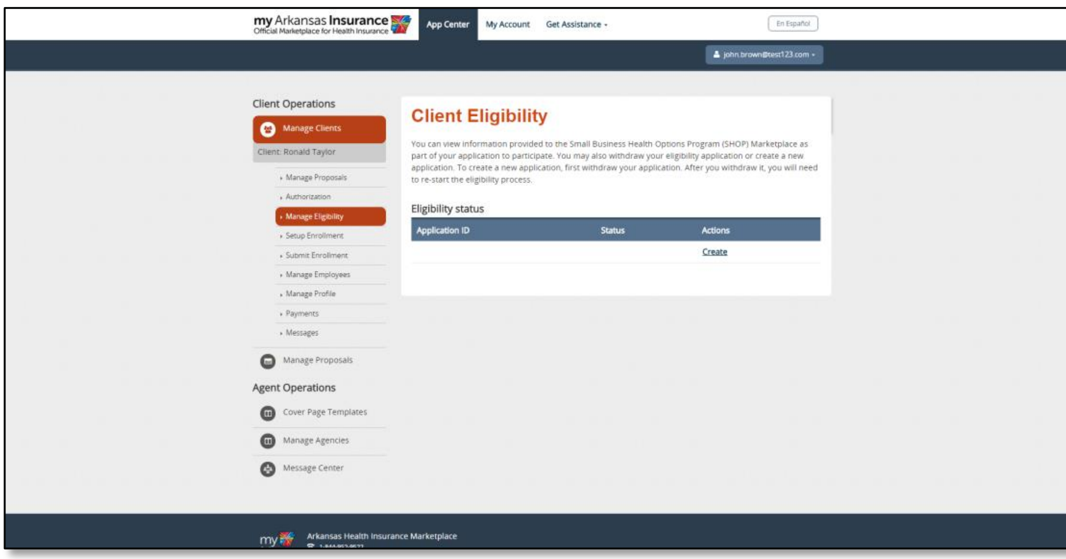


Figure 40: Client Eligibility page

5.3.1: Create Eligibility Application

To create an eligibility application:

1. On the Client Eligibility page, click **Create** under the Actions column.
2. Read the self-attestation message, and click **Continue**.

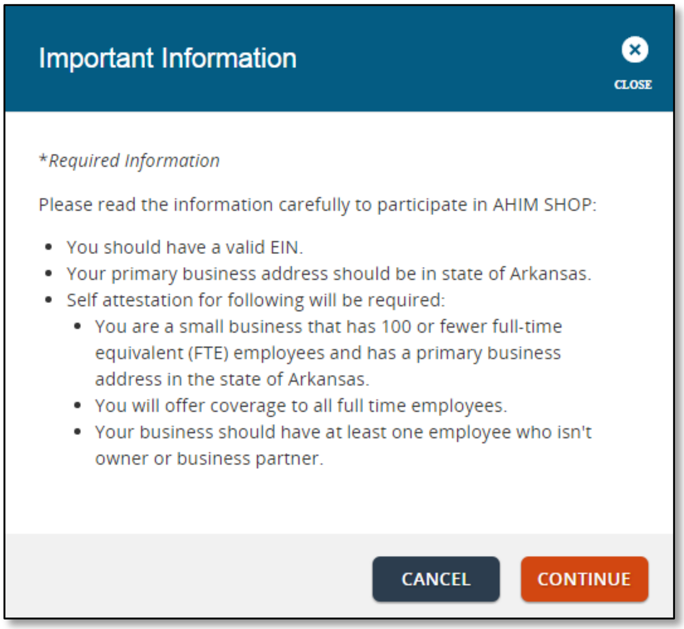


Figure 41: Self-Attestation Message

5.3.1.1: Enter Employer Details

To create your employer profile on the Agent Portal:

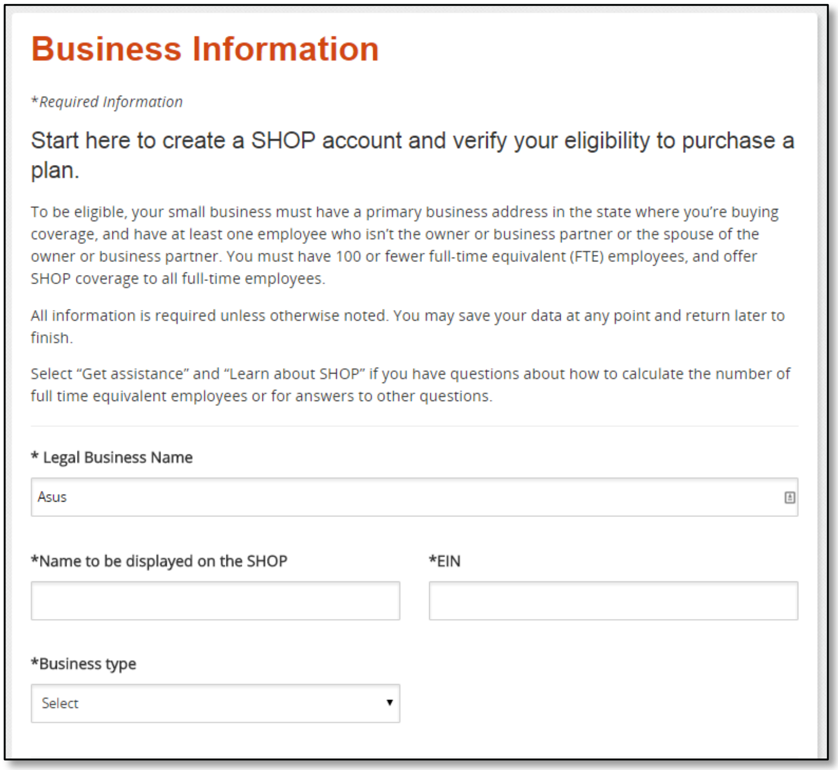


Figure 42: Business Information page

1. Enter the Legal Business Name, Name to be displayed on the SHOP, Employer Identification Number (EIN), and Business type.
2. In the **Business Address** fields, enter the legal business address.
3. In the **Primary Business Address** fields, enter the legal business address.
4. Enter **Preferred Mode of Communication**: Email address or Mailing address
5. Enter **Preferred Language**: English or Spanish
6. Click **Save & Continue**
7. On the Employer Information – Primary page, enter primary contact details, mailing address, and, contact preferences.

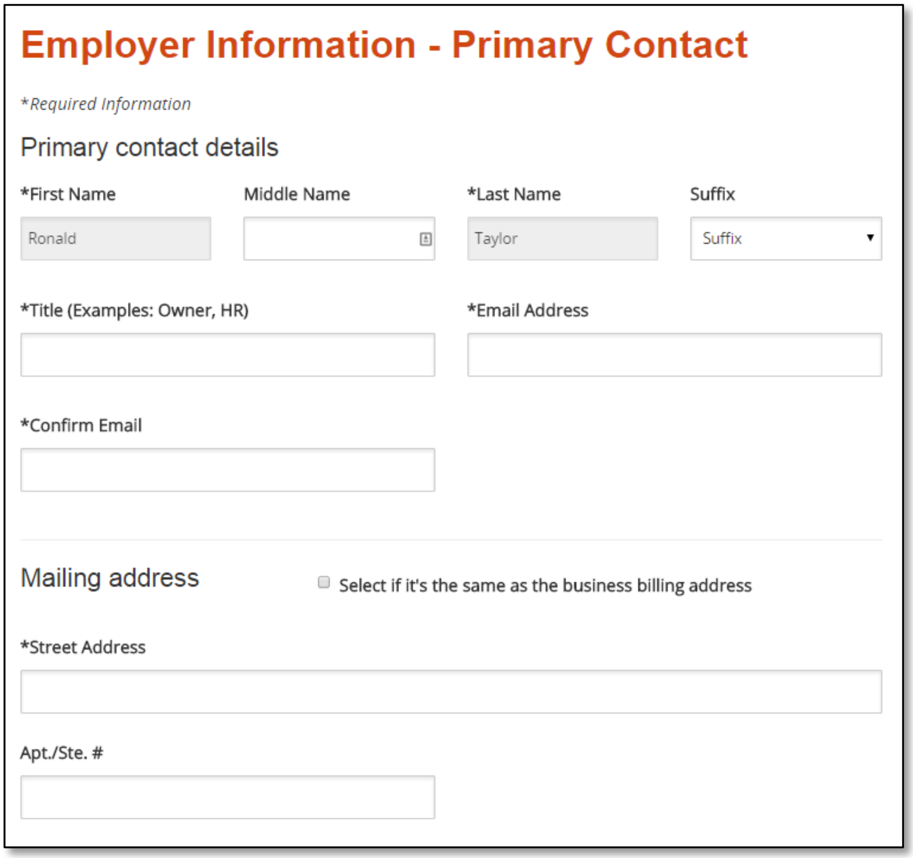


Figure 43: Employer Information-Primary page

8. Click **Save & Continue**.

5.3.1.2: Verify Eligibility

To be eligible to purchase plans on the SHOP marketplace, your client must:

- Have a valid EIN
- Have a primary business address in the state of Arkansas
- Provide a self-attestation for the following required:
    - You are a small business with less than 100 employees.
    - You will offer coverage to all full time employees.
    - Your business should have at least one employee who isn’t owner or business partner.

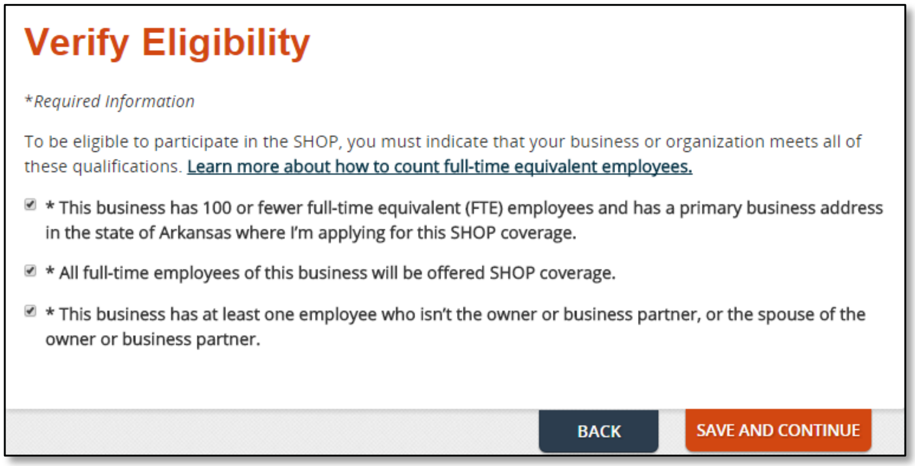


Figure 44: Verify Eligibility page

1. On the Verify Eligibility page, read the self-attestation.
2. Check the checkbox next to each attestation.
3. Click **Save and Continue**.

5.3.1.3: Managing Employees

Once you complete the eligibility attestation for your client, you can manage their employee list on the Employee Details section.

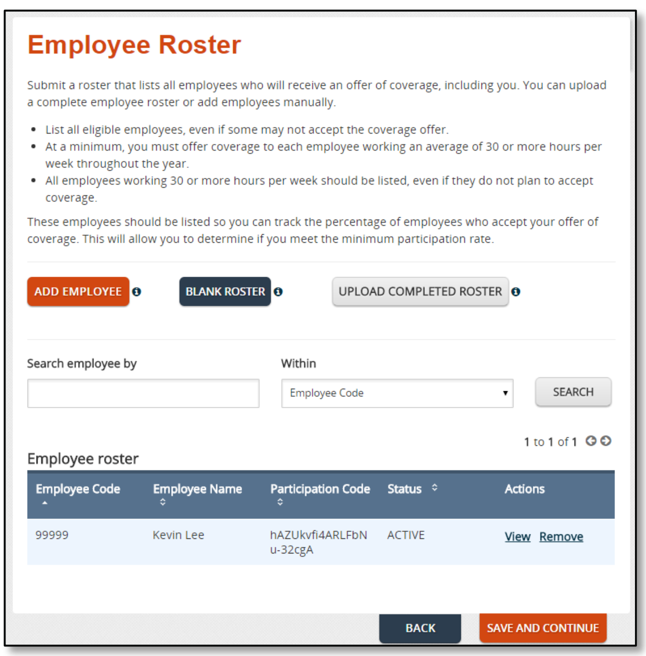


Figure 45: Employee Roster page

You can add new employees to the roster, edit their details, and remove them from the employee list on the Employee List page.

5.3.1.4: Adding New Employees

To add employees to the roster, you can upload the information of multiple employees using an Excel spreadsheet Roster Template or click Add Employee to add each employee individually via a web form.

Adding Employees Using Roster Template

To add employees using the employee template:

1. Click **Blank Roster** to download the Excel template to your computer and **Save** the template.
2. Enter details for your employees in the template and **Save** the template.
3. Click **Choose File** and then follow the instructions to upload your Excel template spreadsheet.

	A	B	C	D	E	F	G	H	
1	**Suffix**	**Employee First Name***	**Employee Last Name***	**Employee Middle Name**	**Employee Gender***	**Employee Email Address**	**Employee Date of Birth***	**Employee Social Security Number***	**Pre Me Co**
2		Jane	Doe		Female	jane.doe@employee.com	02/02/1985	324-78-9090	EM
3		Josh	Smith		Male	josh.smith@employee.cor	03/03/1983	123-89-6789	EM
4		Lynn	Roberts		Female	lynn.roberts@employee.c	04/04/1988	345-89-6789	EM
5									
6									
7									
8									
9									
10									
11									
12									
13									
14									
15									

Figure 46: Employee Roster Template

Adding Employees Manually

To add each employee individually:

1. On the **Employee Roster** page, click **Add Employee**.
2. On the **Enter Employee Details** page, enter the following employee details:
    a. **Employee Name**
    b. **Social Security Number**
    c. **Date of Birth**
    d. **Email Address**
    e. **Employment Type**

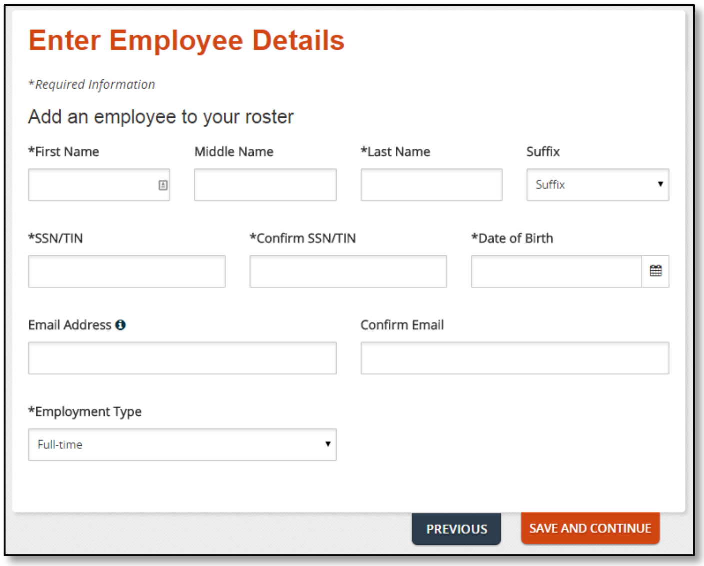


Figure 47: Enter Employee Details page

3. On the Enter Employee Details page, enter the following:
   a. Employee code
   b. Date of Hire
   c. Gender
   d. Phone Number
   e. Preferred Method of Contact
   f. Mailing Address
   g. Add Dependents

4. On the **Employee Dependent Details** page, enter the following dependent details:
   a. **Name**
   b. **Date of Birth**
   c. **Social Security Number**
   d. **Relationship to Employee**
   e. **Sex**
   f. **Tobacco User**
5. Click **Add Dependent** to add more dependents.
6. Click **Save and Continue**.

5.3.1.5: Review and Sign

Once you complete the employee roster, you can review and sign the Eligibility Application.

To sign the Eligibility Application:

1. Check the self-attestation checkbox.
2. Enter full name in Authorized Assister's E-Signature field.
3. Click **Save & Continue**.

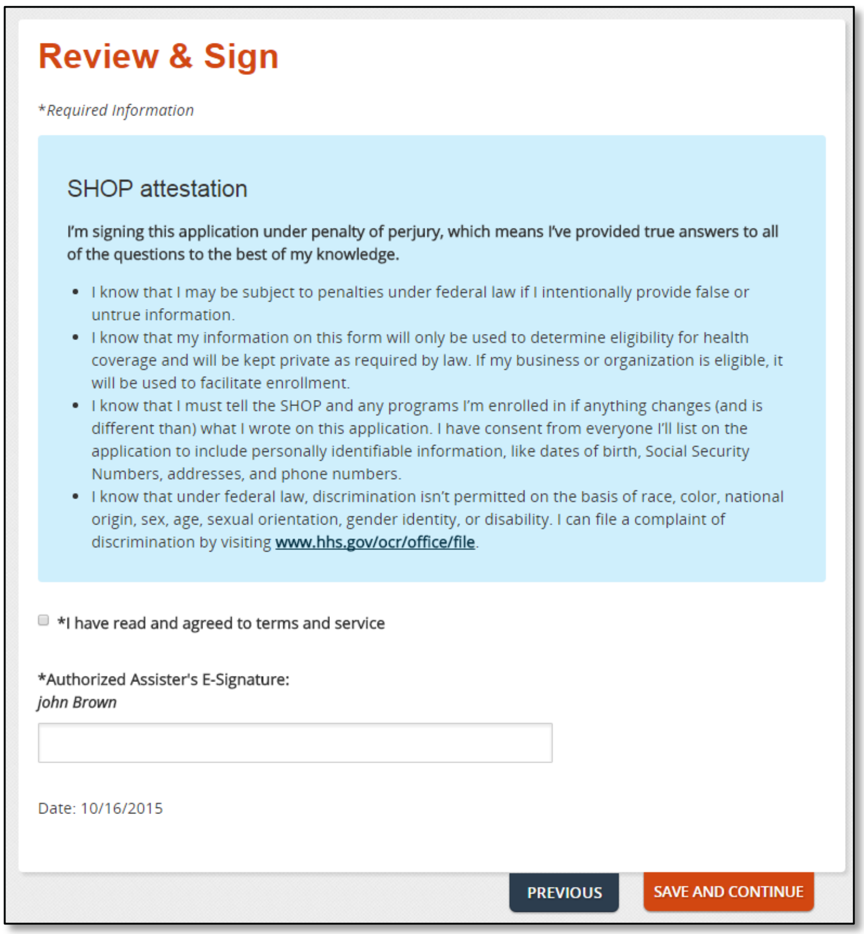


Figure 48: Review & Sign page

5.4: Create Enrollment

The Client Eligibility page enables you to create an enrollment application to send to employees as an enrollment offer.

There are eight steps to creating an enrollment:

- Set Enrollment Period
- Decide How to Offer Coverage
- Set Employer Premium Contribution
- Select Plans
- View Summary & Submit

To create an enrollment:

1. Click **Create Enrollment** from the Client Eligibility page.

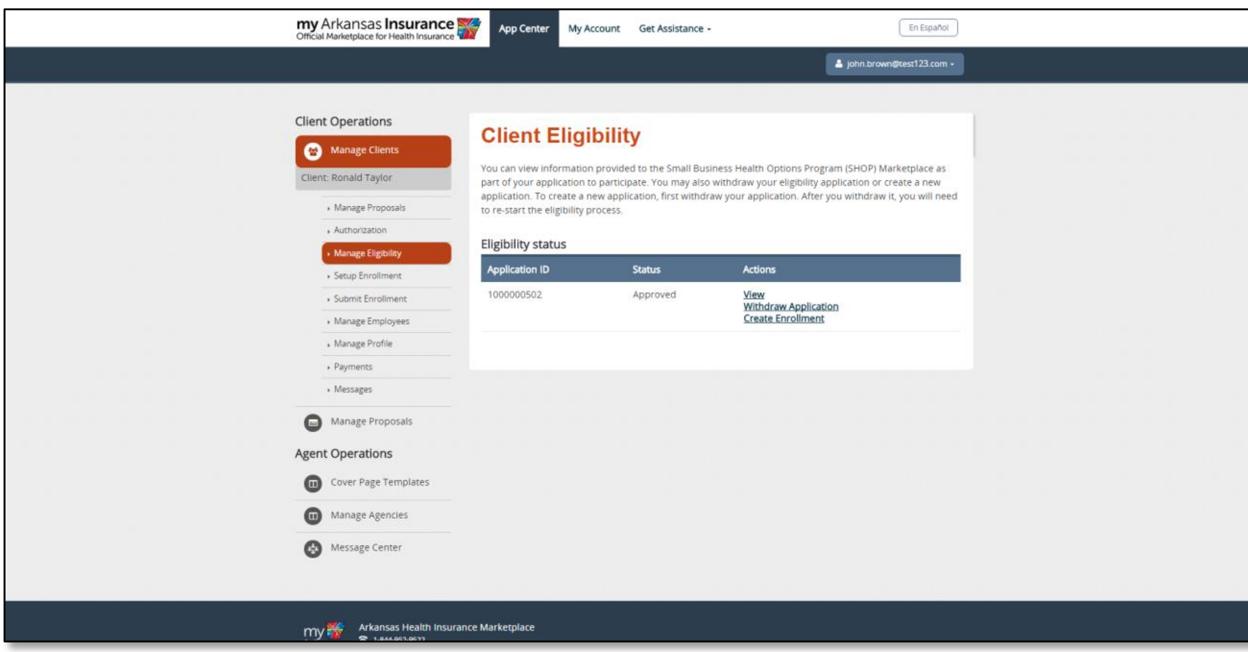


Figure 49: Client Eligibility page

5.4.1: Set Enrollment Period

To set enrollment period:

8. Select **Start coverage on** date.
9. Select **Open Enrollment Start Date and End Date**.
10. Select **Waiting Period**.
11. Click **Save and Continue**.

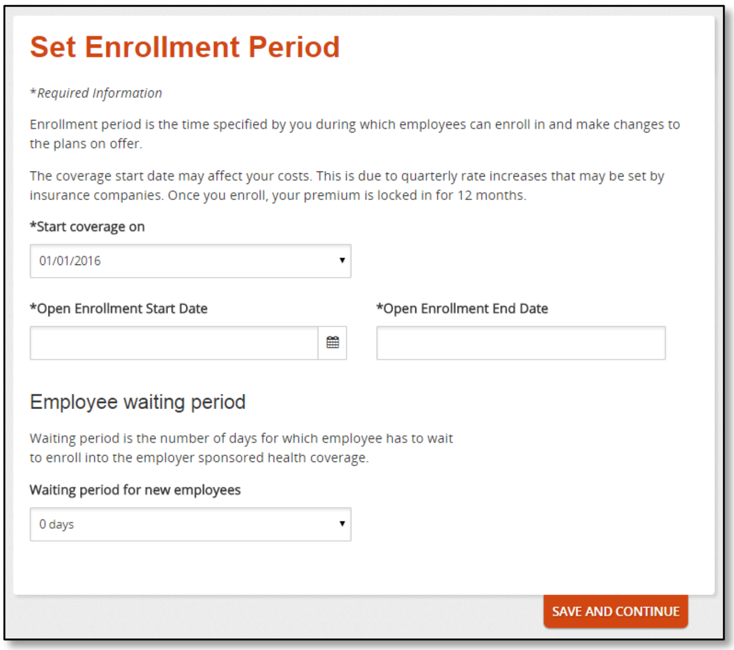


Figure 50: Set Enrollment Period page

5.4.2: Decide How to Offer Coverage

The Decide How to Offer Coverage page enables you to select the types of health plans for the enrollment offer. The plan benefits you select on this page will filter the plans that are rolled out to the employees on the enrollment offer.

There are two options when selecting plan benefits:

- Option One: Employees can select plans in one metal tier from all carriers.
- Option Two: Employees can select one plan from one carrier.

Figure 51: Decide How You Offer Coverage

5.4.3: Defining Contribution

The Define Contribution page enables you to define the percentage or maximum dollar amount that the employer wants to contribute towards the employees' health plans, as a premium for employees and their dependents. To qualify for tax credits, the employer must pay at least 50% of your full-time employees' premium costs.

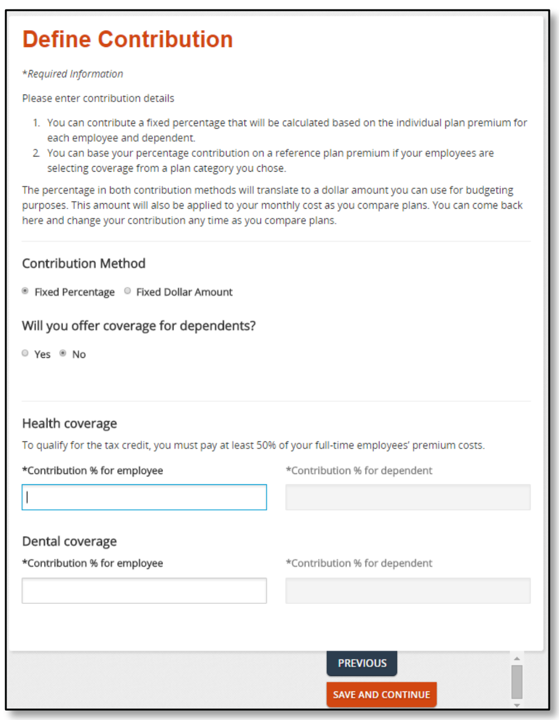


Figure 52: Define Contribution page

To define employer contribution towards the employee's health insurance premium:

5. Select **Fixed Percentage** or **Fixed Dollar Amount** to specify your contribution type.
6. Select **Yes** or **No** to specify if you want to contribute for the dependents of the employees.
7. Enter your contribution for medical and dental insurance in the specific fields for both employees and their dependents, if applicable.
8. Click Save and Continue.

5.4.4: Select Plans

The Select Plans page enables you to select the plans for the enrollment offer to be rolled out to the employees. The premium rates mentioned for the plan on the Select Plans page are monthly employer contributions.

Each standalone plan may have associated entities. Entities are add-on insurance plans that cover health-related services that are not typically covered by the selected health plan.

To add plans to enrollment application:

1. On the **Plans** page, click **Add to Cart.**
2. Scroll to the bottom of the page and click **Save and Continue.**

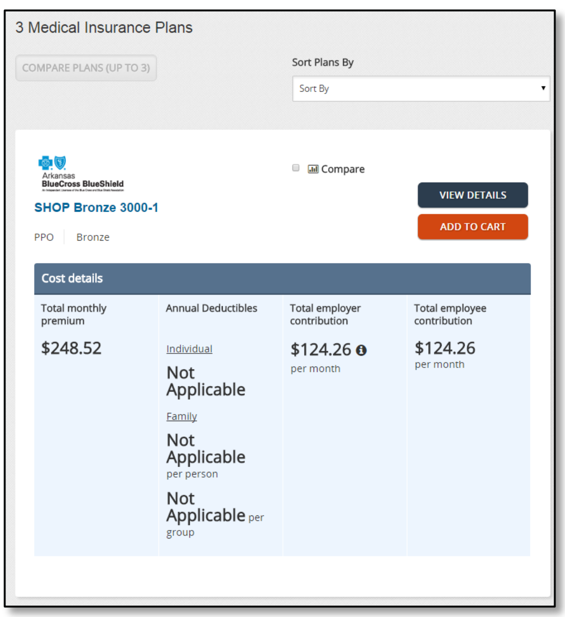


Figure 53: Plans page

5.4.5: View Summary and Submit

The final step to creating the enrollment application is to review the detail. A summary of estimated premium costs and your plan selections. Select “Edit” to make any changes. To change plans, go to “Select plans” on the left. Select “Submit” when you’re ready to offer coverage

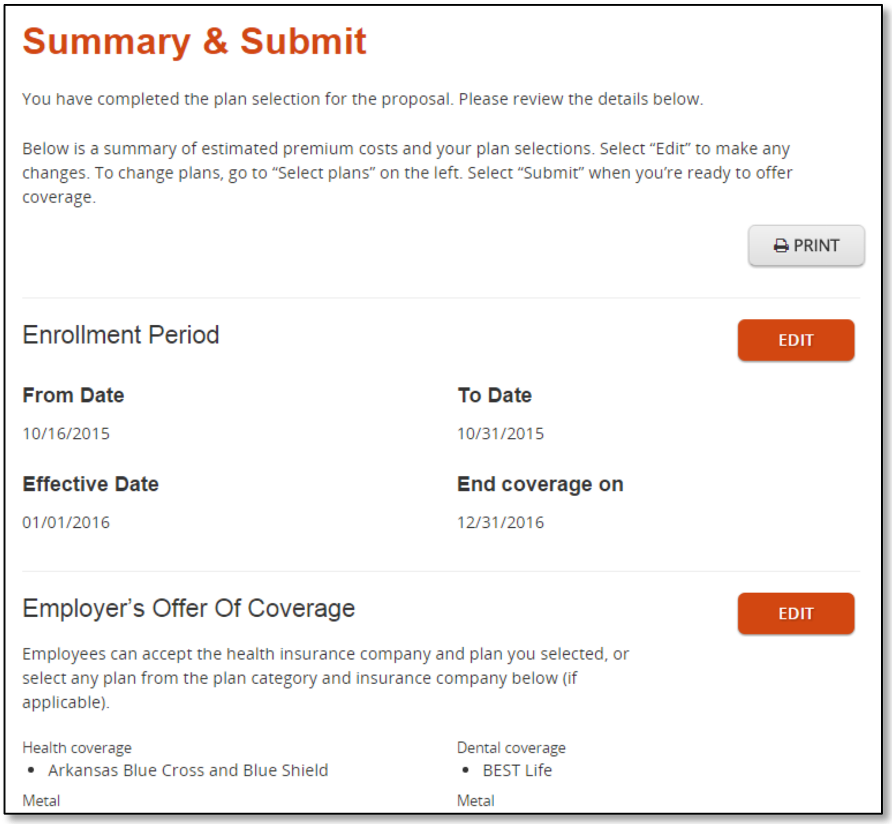


Figure 54: Summary & Submit page

Once edits are complete, click **Submit**.
A notification email will be sent to the employees submitting with the enrollment application.

5.5: Manage Enrollment

Once the enrollment application is submitted, enrollment details can be viewed from the Client Enrollments page.

You can perform the following activities on the Client Enrollments page:

- View Member and Premium Details
- View Enrollment Details
- Withdraw Enrollment Application
- Submit Enrollment Application

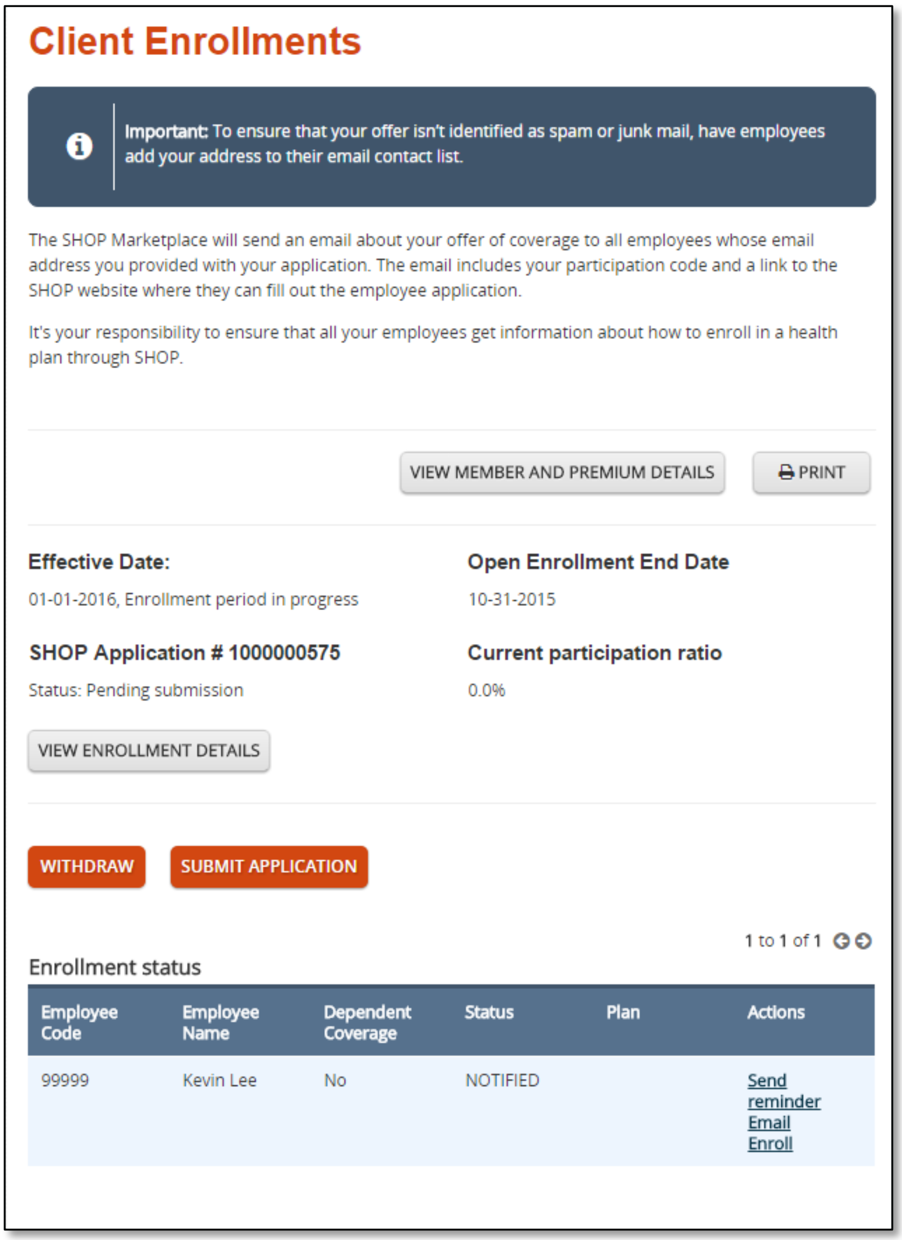


Figure 55: Client Enrollments page

5.5.1: View Member and Premium Details

You can view the current enrollment and premium amounts on the View Member and Premium Details page. You can view:

- Total premium amount
- Total number of employees enrolled
- Employer's total cost
- Employee's total cost
- Detailed plan member and premium information

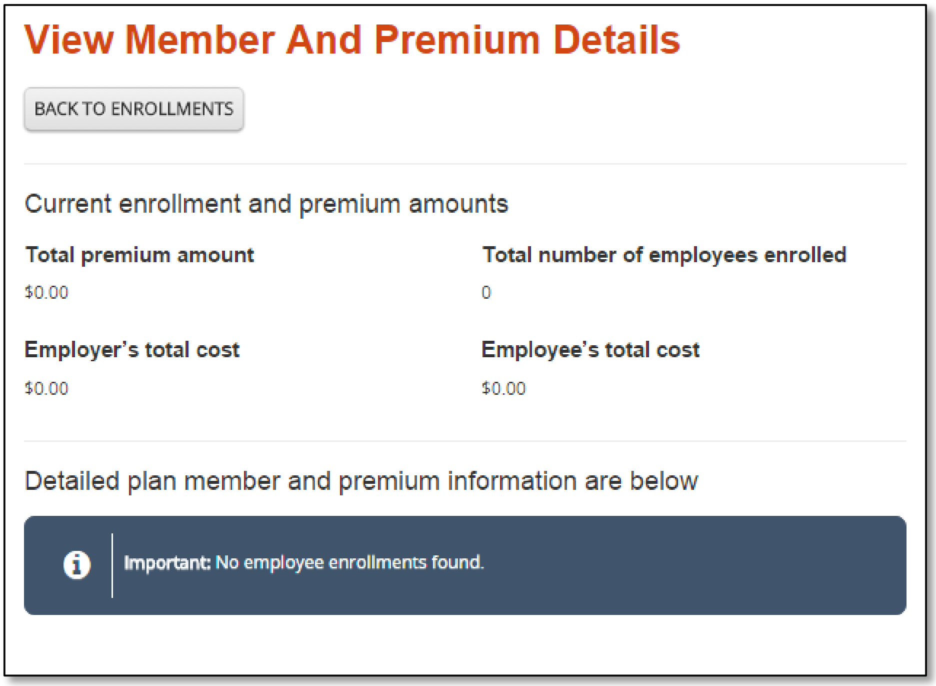


Figure 56: View Member and Premium Details page

5.5.2: View Enrollment Details

You can view details of the enrollment applications from the Employer Enrollment Details page: You can view:

- Enrollment Period
- Employer's Offer of Coverage
- Employer's Contribution
- Plans Selected

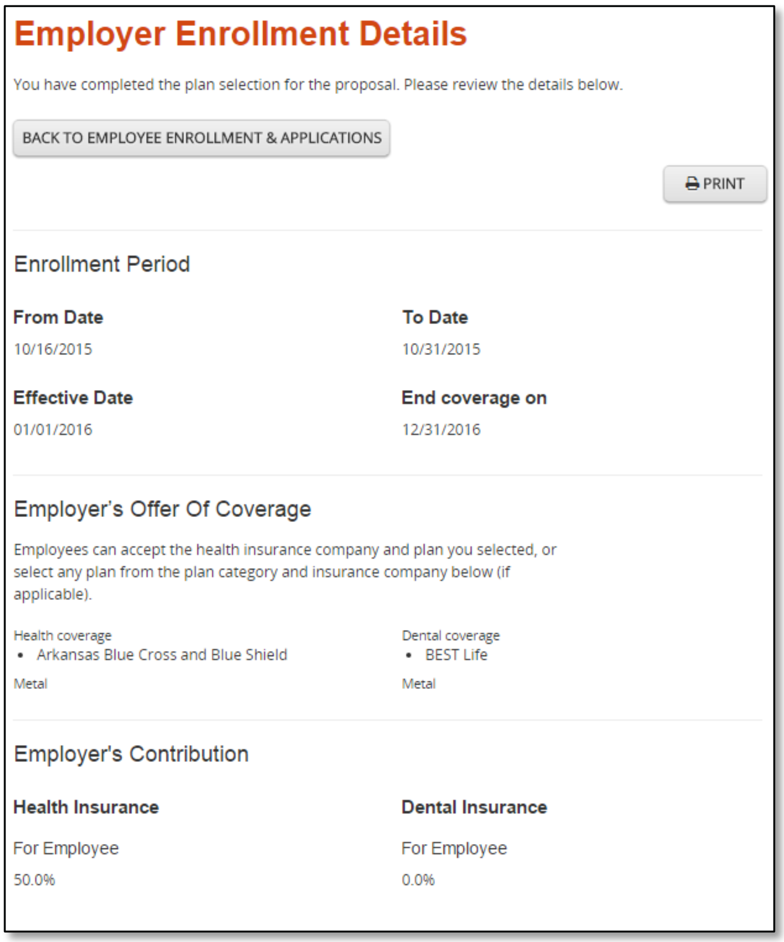


Figure 57: Employer Enrollment Details page

5.5.3: Withdraw Enrollment Application

You can withdraw the enrollment application from the Client Enrollments page.

To withdraw the application:

1. Click **Withdraw**.
2. Click **OK**.

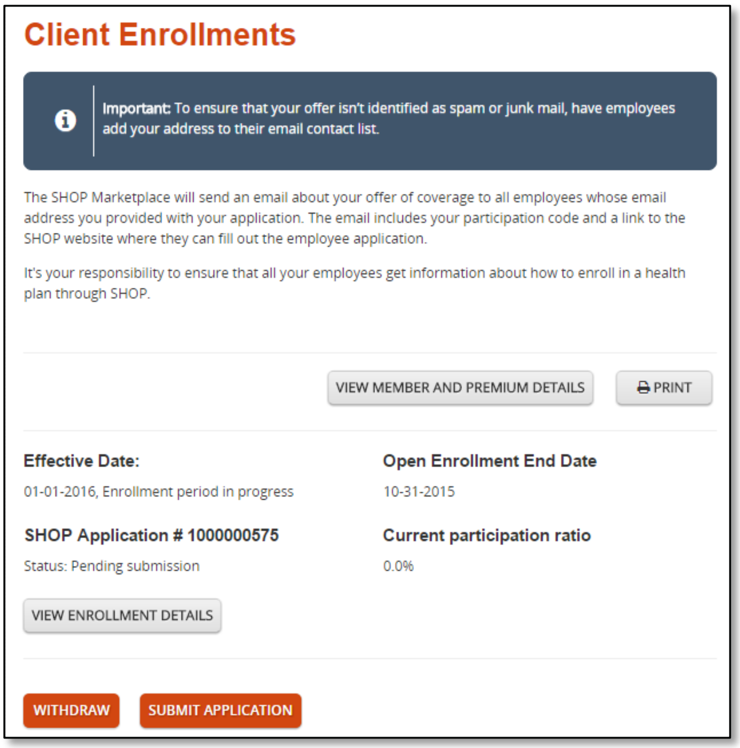


Figure 58: Withdraw Application

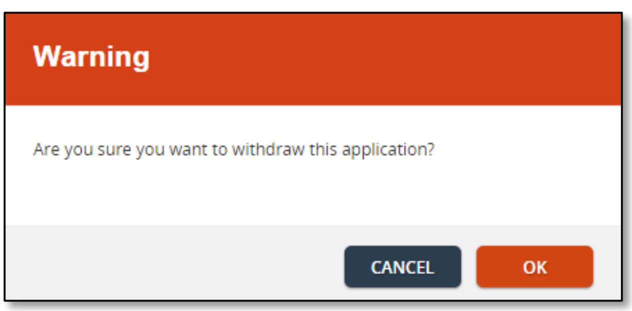


Figure 59: Withdraw Warning Message

5.5.4: Send Reminder Email

You can send a reminder email to employees to remind them to select or waive coverage offered by their employer.

To send a reminder email:

1. From the Clients Enrollment page, click **Send Reminder Email** next to the employee's name.
2. Click **OK** to confirm.

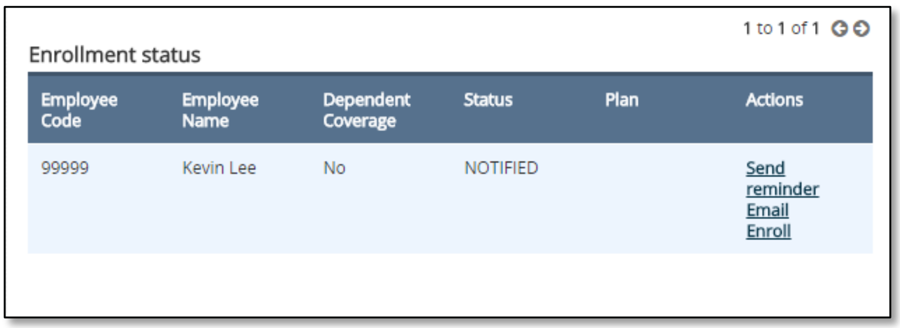


Figure 60: Send Reminder Email link

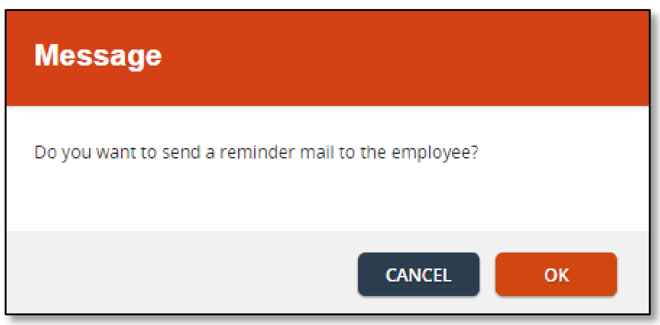


Figure 61: Confirmation to Send Reminder Email

6: Enroll Employees

Brokers can enroll employees in health coverage plans offered by their employers. They can also waive employees.

To enroll employees:

1. From the Client Enrollment page, click **Enroll** next to the employee you wish to enroll.

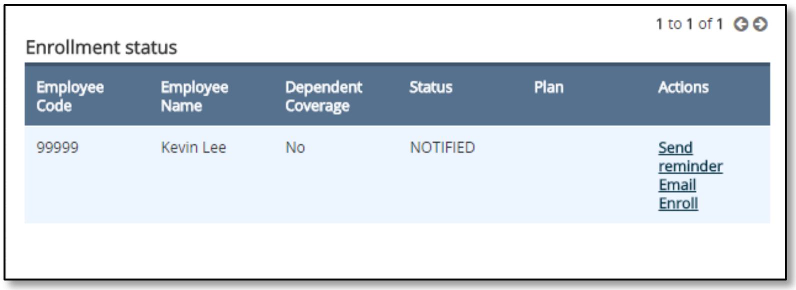


Figure 62: Enroll link

To accept coverage on behalf of the employee:

1. From the My Employer page, click the **Yes** radio button.

Figure 63: Accept coverage link

2. Scroll down the page and complete the employee's profile information.

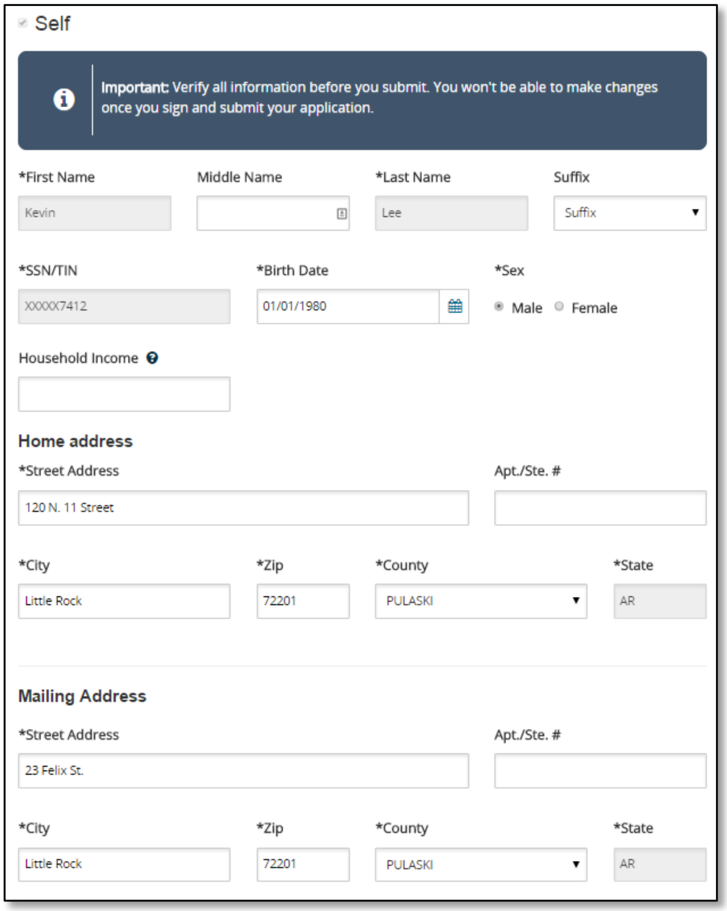


Figure 64: Employee Profile

3. Scroll down and sign the attestation form.

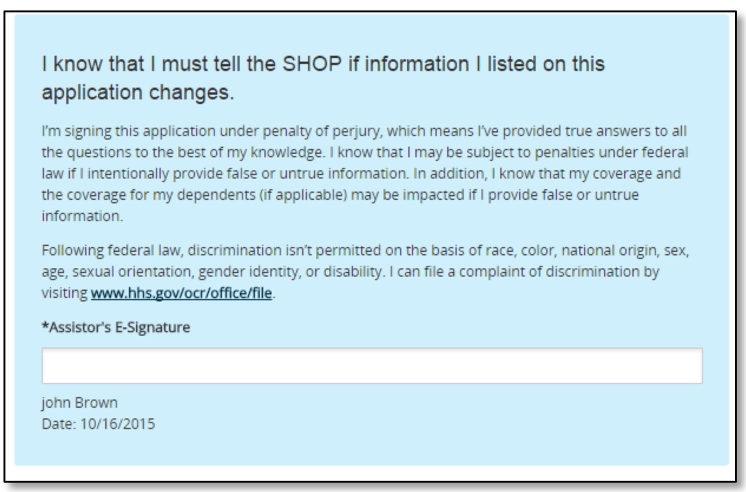


Figure 65: Attestation Form

4. Click **Select** next to the plan.
5. Scroll down the page and click **Save and Continue**.

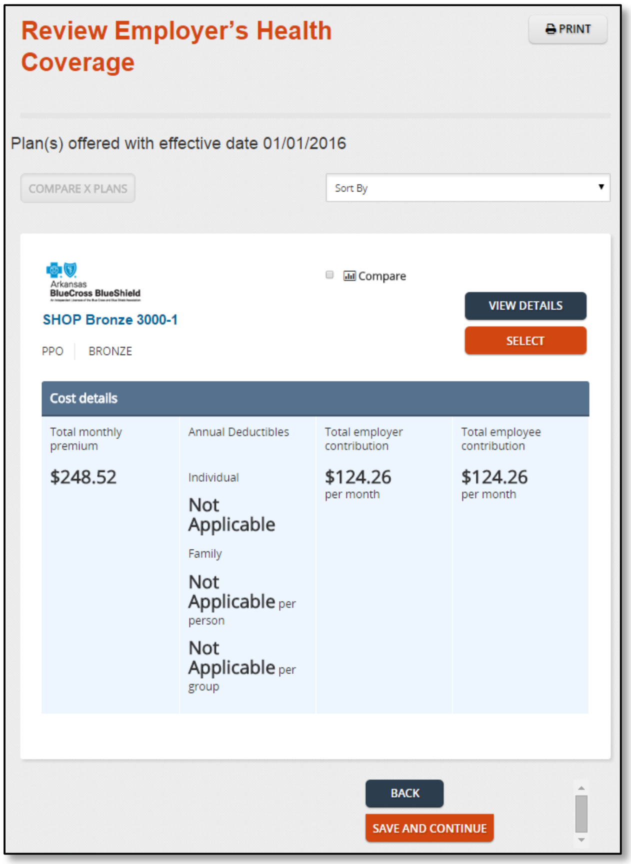


Figure 66: Review Employer's Health Coverage page

6. Review the plans with the employee.
7. Click Waive to waive coverage.
8. Click Confirm to accept coverage.

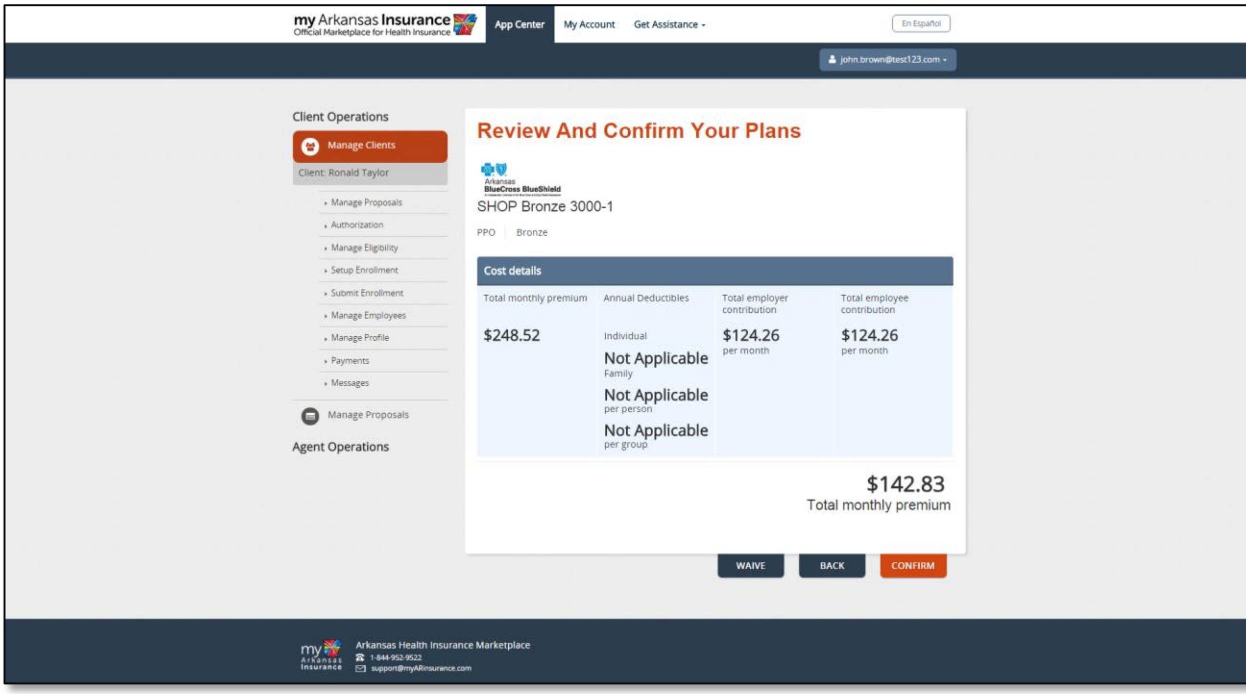


Figure 67: Review and Confirm Your Plans page