

## **Homepage Overview User Guides – For Brokers**

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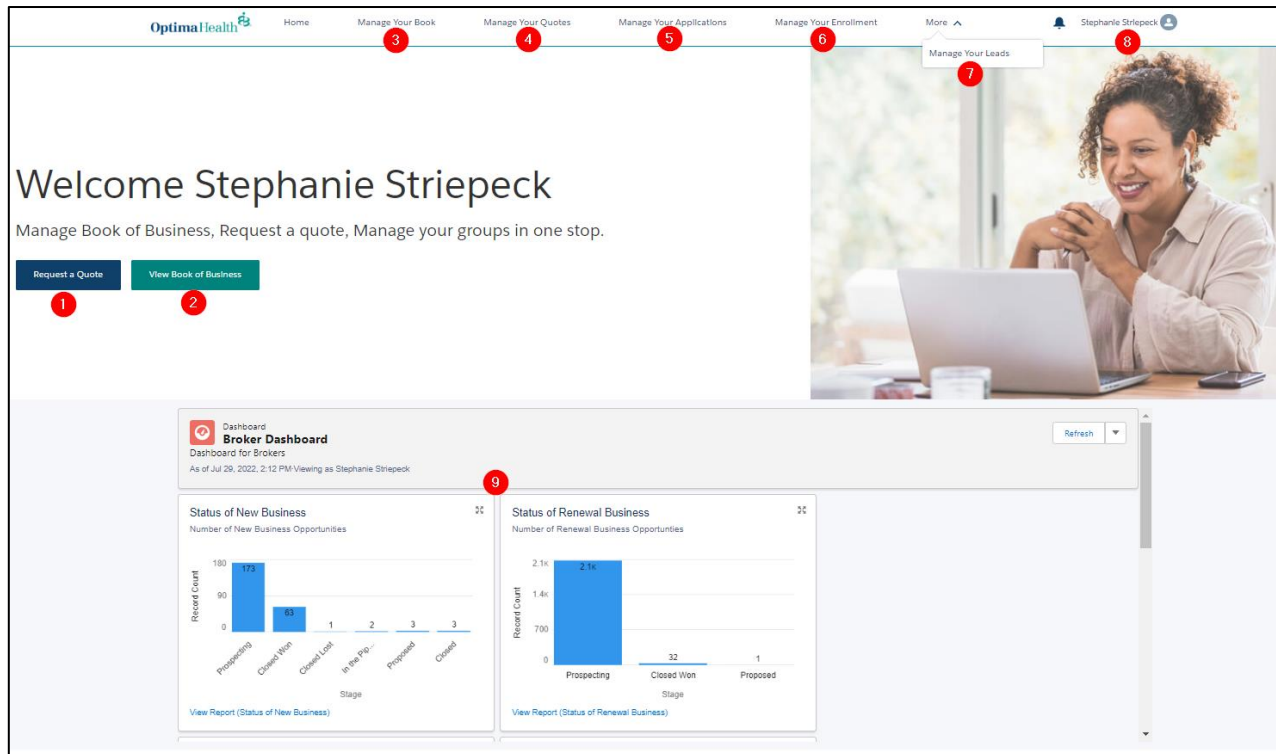
## Purpose

The purpose of this user guide is to provide an overview of the eBroker homepage.

## Your Homepage

From your eBroker homepage, you can perform the following actions:

1. request a quote
2. view your book of business
3. manage your book of business
4. manage your quotes
5. manage your applications
6. manage your enrollment
7. manage your leads
8. update demographics
9. view and access your dashboards



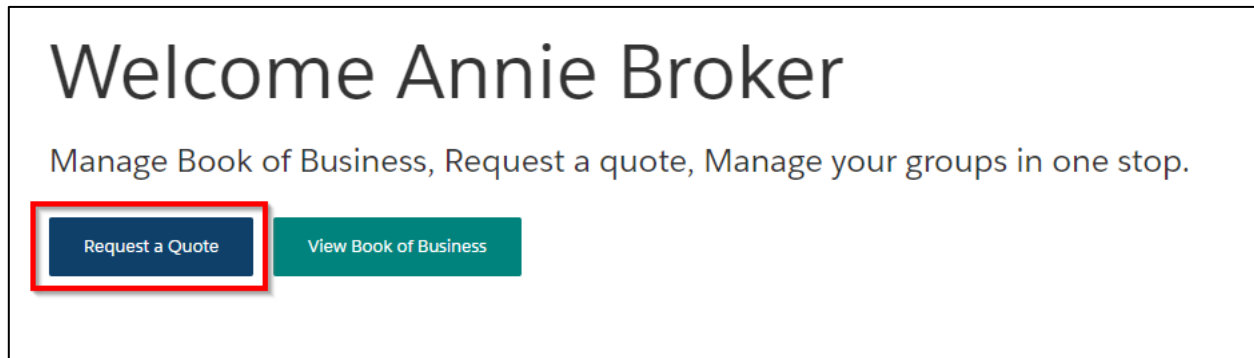
The screenshot shows the eBroker homepage for Stephanie Striepeck. The navigation bar includes links for Home, Manage Your Book, Manage Your Quotes, Manage Your Applications, Manage Your Enrollment, and More. Below the navigation bar is a welcome message and two main action buttons: 'Request a Quote' and 'View Book of Business'. The dashboard section includes two bar charts: 'Status of New Business' and 'Status of Renewal Business'.

Stage	Record Count
Prospecting	173
Closed Won	93
Closed Lost	1
In New Pp...	2
Proposed	3
Closed	3

Stage	Record Count
Prospecting	2.1k
Closed Won	32
Proposed	1

## Request a Quote

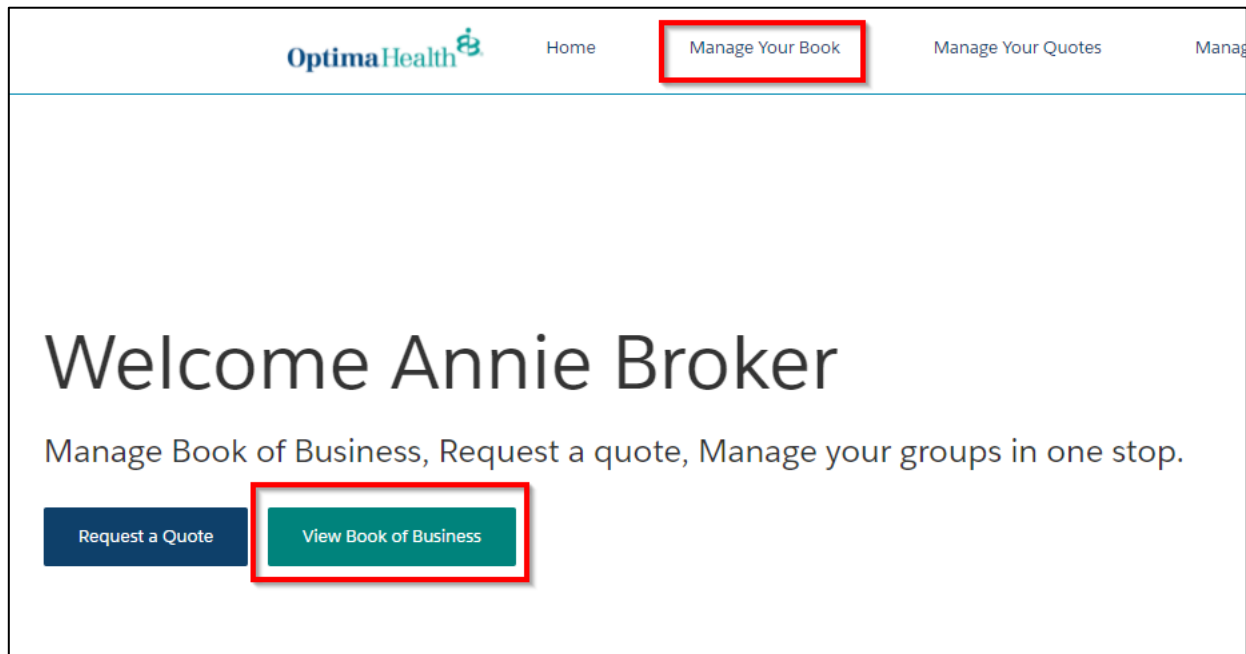
From the homepage of your portal, click on **Request a Quote** to begin a new quote. You can use this button to request a quote for Small Group, Mid-Market and Level Funded.



Please refer to the *Quote Process User Guides* for the quoting process.

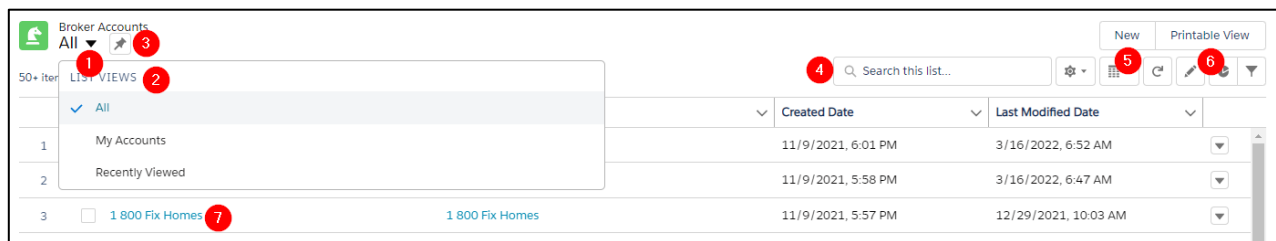
## View Book of Business

There are 2 ways you can view your Book of Business from your homepage. You can click **View Book of Business** or **Manage Your Book**.



From the Book of Business screen, you perform do the following activities:

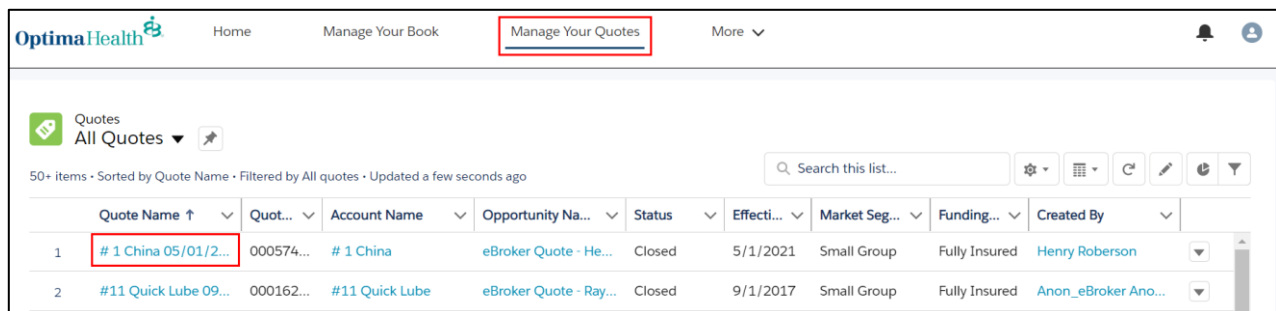
1. adjust your view of accounts by clicking on the arrow by the account list
2. select which list of accounts you would like to view
3. pin a list by clicking on the pushpin image
4. search the list by utilizing the *Search this list* field
5. create a new account by clicking **New**
6. generate a printable view of the list by clicking **Printable View**
7. manage your group's enrollments by clicking on the **account name**




For additional Book of Business functionalities, please refer to the *Book of Business User Guide* and *Member Enrollment for Brokers User Guide*.

## Manage Your Quotes


Click **Manage Your Quotes** to view all your quotes. To view a specific quote, click on the **Quote Name**.



On the Quote Detail screen, you will see the quote information, the status of the quote and be able to perform quote actions.

 **Quote**  
 Test 12/1/2021 Annie Broker

Quote Number	Expiration Date	Opportunity ID	Status	Type
00059470	11/30/2022	Test 12/1/2021	Final Review	New Business





**Details**   Related

Quote Number 00059470	Effective Date 12/1/2021
Quote Name Test 12/1/2021 Annie Broker	Expiration Date 11/30/2022
Opportunity Name Test 12/1/2021	Renewal Month December







## Manage Your Applications










Click **Manage Your Applications** to view all your applications. Click on the **Application Name** to access the application's page.

Note: The *Application Name* is system generated.

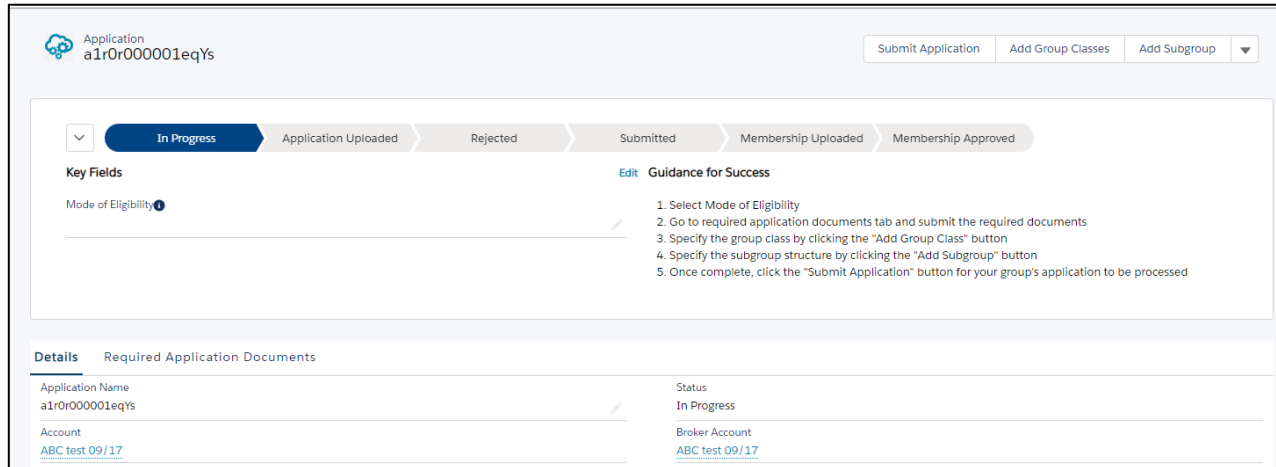
 **Applications**  
 All 

9 Items - Sorted by Account - Filtered by All applications - Updated a few seconds ago

<input type="checkbox"/>	Account ↑	Application Name	Status	Opportunity	Quote	Broker Account	Created Date	
1	<input type="checkbox"/> ABC test 09/17	a1r0r000001eqYs	In Progress	ABC test 09/17 10/1...	ABC test 09/17 10/1...	ABC test 09/17	9/17/2021, 6:31 AM	
2	<input type="checkbox"/> ABC Test 9-2-21 SG C...	a1r0r000001epSI	In Progress	ABC Test 9-2-21 SG C...	ABC Test 9-2-21 SG C...	ABC Test 9-2-21 SG C...	9/2/2021, 5:41 AM	
3	<input type="checkbox"/> ABC Test Aug 18	a1r0r000001ep4p	Application Uploaded	ABC Test Aug 18 12/1...	ABC Test Aug 18 202...	ABC Test Aug 18	8/25/2021, 11:01 AM	
4	<input type="checkbox"/> ABC Test Aug 20	a1r0r000001eoOq	In Progress	ABC Test Aug 20 12/1...	ABC Test Aug 20 12/...	ABC Test Aug 20	8/20/2021, 4:00 AM	
5	<input type="checkbox"/> American Dream Lan...	a1r0r000001ewKI	Membership Uploaded	American Dream Lan...	American Dream Lan...	American Dream Lan...	10/6/2021, 3:20 AM	
6	<input type="checkbox"/> American Dream Lan...	a1r0r000001ewKc	Submitted	American Dream Lan...	American Dream Lan...	American Dream Lan...	10/6/2021, 3:22 AM	
7	<input type="checkbox"/> Test	a1r0r000001fNBj	In Progress	Test 12/1/2021	Test 12/1/2021 Anni...	Test	11/2/2021, 1:59 PM	
8	<input type="checkbox"/> Test Group	a1r0r000001fMY6	In Progress	Test Group 11/1/2021	Test Group 11/1/202...	Test Group	10/28/2021, 7:20 AM	
9	<input type="checkbox"/> Test2	a1r0r000001fMV...	Application Uploaded	Test2 12/1/2021	Test2 12/1/2021 An...	Test2	10/27/2021, 12:19 PM	

On the application detail screen, you will be able to view all information related to the application, view and upload Required Application Documents and perform application activities if applicable.



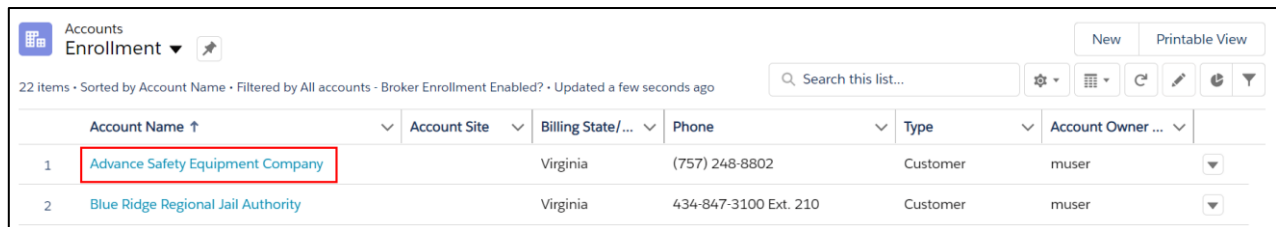
The screenshot shows the application detail screen for application ID a1r0r000001eqYs. At the top right, there are buttons for "Submit Application", "Add Group Classes", and "Add Subgroup". Below this is a progress bar with stages: In Progress (active), Application Uploaded, Rejected, Submitted, Membership Uploaded, and Membership Approved. Under "Key Fields", the "Mode of Eligibility" field is visible. To the right, there is a "Guidance for Success" section with a list of 5 steps: 1. Select Mode of Eligibility, 2. Go to required application documents tab and submit the required documents, 3. Specify the group class by clicking the "Add Group Class" button, 4. Specify the subgroup structure by clicking the "Add Subgroup" button, and 5. Once complete, click the "Submit Application" button for your group's application to be processed. At the bottom, there is a "Details" section with a table of application information.

Details		Required Application Documents	
Application Name	a1r0r000001eqYs	Status	In Progress
Account	ABC test 09/17	Broker Account	ABC test 09/17

To learn more about managing your applications please refer to the *Application Process for Brokers User Guide*.

## Manage Your Enrollment

Click **Manage Your Enrollment** to view all your accounts. Click on the **Account Name** to view an account.



The screenshot shows the "Accounts Enrollment" page. It features a search bar, a "New" button, and a "Printable View" button. Below the search bar, there is a table with 22 items, sorted by Account Name. The table has columns for Account Name, Account Site, Billing State/..., Phone, Type, and Account Owner. The first row is highlighted with a red box around the "Account Name" cell, which contains "Advance Safety Equipment Company". The second row is "Blue Ridge Regional Jail Authority".

	Account Name ↑	Account Site	Billing State/...	Phone	Type	Account Owner ...
1	Advance Safety Equipment Company		Virginia	(757) 248-8802	Customer	muser
2	Blue Ridge Regional Jail Authority		Virginia	434-847-3100 Ext. 210	Customer	muser

To learn more about managing enrollment please refer to the *Member Enrollment for Brokers User Guide*.

## Manage Your Leads

Click **Manage Your Leads** to view all your leads. Click on the **Lead Name** to view a lead.

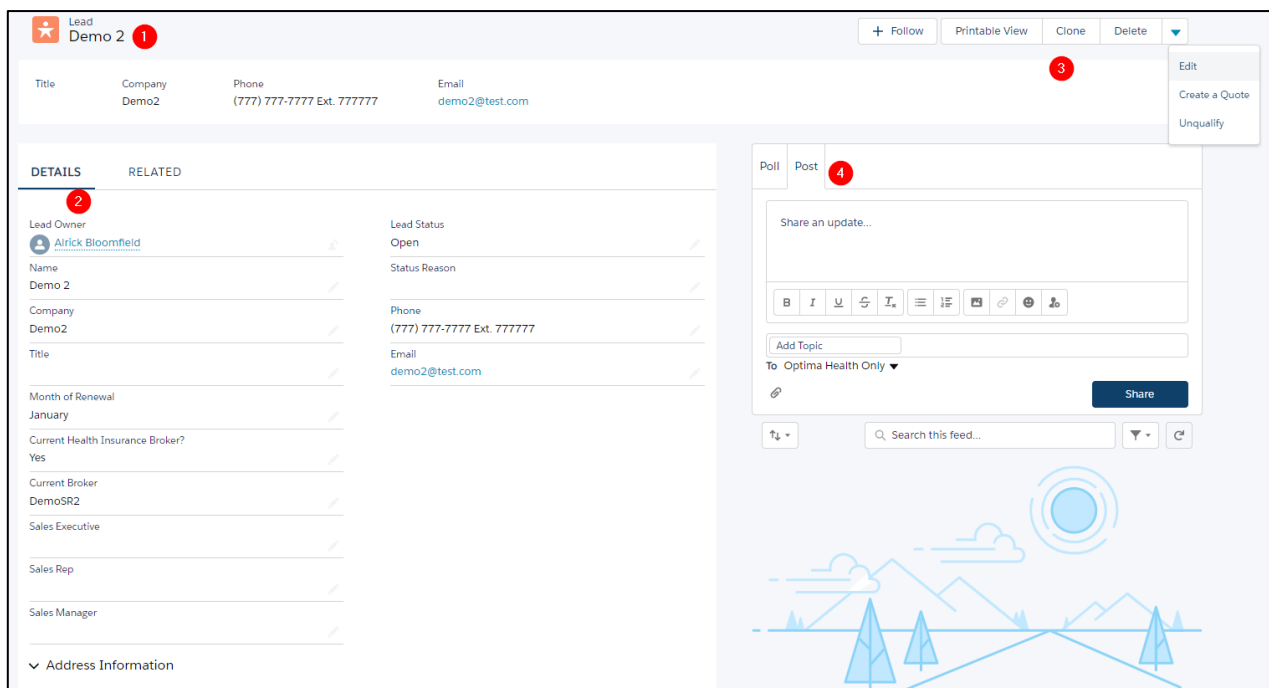


	Name	Company	Phone	N...	Sales Rep	Lead ...	Created Date	Email
1	Andy Smith	Universal Technologies	(555) 555-1212			Open	2/25/2021, 7:34 PM	info@salesforce.com
2	Demo 2	Demo2	(777) 777-7777 Ext. 777777	2-24		Open	5/3/2022, 4:59 PM	demo2@test.com

On the Lead Details screen, you can access a variety of information and functions.

You can:

1. view high level demographic details
2. view and edit specific information related to the lead. To make an edit to a field, hover over the field and click the pencil icon on the right of the field. Remember to click **Save** after making your edits
3. perform a variety of functions related to the lead including **Follow, Clone, Delete, Edit, Create a Quote, Unqualify** viewing a **Printable View**
4. make a post/share an update related to the Lead. Select who to send the update to and click **Share**



**Lead Demo 2** (1)

+ Follow Printable View Clone Delete

Title: Demo2 | Company: Demo2 | Phone: (777) 777-7777 Ext. 777777 | Email: demo2@test.com

**DETAILS** (2)

Lead Owner: Alrick Bloomfield  
 Name: Demo 2  
 Company: Demo2  
 Title: Demo2  
 Month of Renewal: January  
 Current Health Insurance Broker?: Yes  
 Current Broker: DemoSR2  
 Sales Executive: DemoSR2  
 Sales Rep: DemoSR2  
 Sales Manager: DemoSR2

Lead Status: Open  
 Status Reason:   
 Phone: (777) 777-7777 Ext. 777777  
 Email: demo2@test.com

**Share an update...** (4)

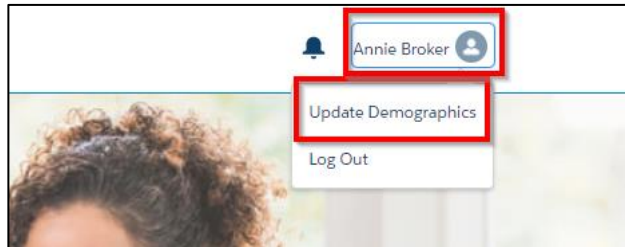
Add Topic:   
 To: Optima Health Only  
Share

Edit  
 Create a Quote  
 Unqualify



## Update Demographics

To update your account demographics, click on the grey avatar in the upper right-hand corner on your homepage. Click **Update Demographics**. Fill out the information and click **Update**.



### Update Information

Please confirm the information below is updated and accurate

✓ Update Phone Number

Phone Number

✓ Update Address and Other Information

Update Address, Agency, Email, Last Name or Tax ID ⓘ

## Access Dashboards

There are a variety of dashboards available from your homepage.

Current dashboards include:

- Status of New Business
- Status of Renewal Business
- Retention Rate of Brokers
- Renewals by Account, and
- Quotes Converted to Active Enrollment

All dashboards are:

1. expandable to a larger view
2. interactive; hover over a graphical element to learn more
3. viewable on a new screen (clicking “View Report” will lead you to the detailed information; see example below)
4. refreshable

Note: Click the arrow to the right of the Refresh button to download an image of all your dashboards.



Below is the detailed report generated upon clicking **View Report (Status of New Business)** below the associated dashboard. From this page you can access a variety of functions.

**Report: Broker Accounts with Opportunities**  
**Status of New Business**  
Status of New Business

Total Records: 245

Stage	Opportunity Name	Account Name: Account Name	Type	Effective Date	Broker Account Name	Agency
Prospecting (173)	refresh check 2/1/2022	refresh check	New Business	2/1/2022	refresh check	-
	UAT refresh check 2 8/15/2022	UAT refresh check 2	New Business	8/15/2022	UAT refresh check 2	-
	UAT MM Refresh Check 6/15/2022	UAT MM Refresh Check	New Business	6/15/2022	UAT MM Refresh Check	-