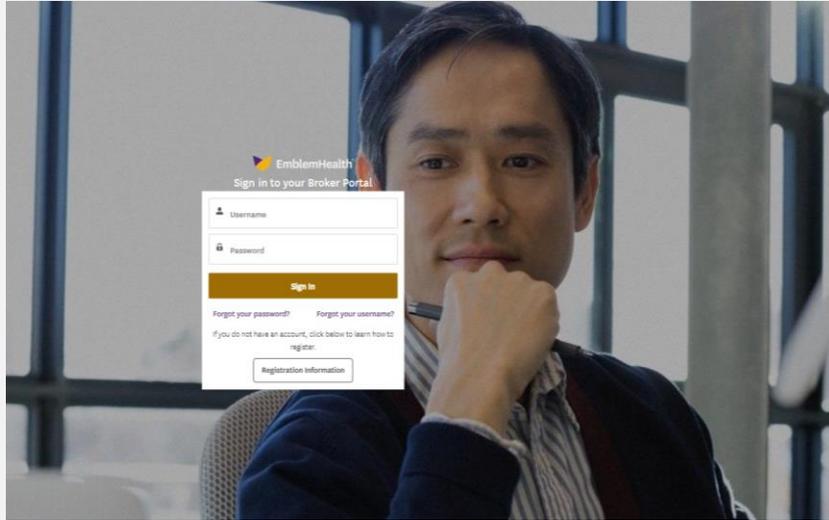


# EmblemHealth

Overview of the secure broker website

September 2021

# KEY FUNCTIONALITY FOR COMMERCIAL BROKERS



- Appointed brokers can:<sup>\*</sup>
  - Manage their book of business
  - Quote new business
  - View benefits and eligibility
  - Submit enrollment changes on behalf of clients
  - Review renewals
  - Access commissions

<sup>\*</sup>The functions listed apply to certain lines of business. Please find more details once signed in to the secure broker site.



# TABLE OF CONTENTS

View the entire document for a complete overview of the new secure broker site or link to a specific section below:

- [Getting started on the secure broker site](#)
- [Managing book of business](#)
- [View commissions](#)
- [Review billing](#)
- [Quote new business](#)
- [Applications](#)
- [Resources](#)
- [Roles and permissions](#)
- [Information for Medicare brokers](#)



# SIGNING IN FOR THE FIRST TIME...

- We have added security features to help prevent unauthorized access to your account and your clients' information.
- You will need an activation email from us to validate your account and sign in to the secure website for the first time.



August 27, 2021

Dear Test,

Your EmblemHealth broker portal account is now ready.

Your username is: [r\\_begum@emblemhealth.com.wilson](mailto:r_begum@emblemhealth.com)  
Click [here](#) to finish setting up your account.

**You must use this new username to sign in. Your old username and password will not work in this new broker portal.**

When logging in for the first time, please check your license number. It should be in the format of AB-1234567. Be sure to include the dash.

If you continue to experience difficulty, contact Broker Services at 866-614-6040, from 9 am to 6 pm, Monday to Friday. You can also send an email to [brokerservices@emblemhealth.com](mailto:brokerservices@emblemhealth.com). As always, you may contact your broker administrator or principal.

Medicare brokers should contact the Medicare Broker Support team at 877-224-7994, from 8 am to 5 pm, Monday to Friday or email [salesoperationsupport@emblemhealth.com](mailto:salesoperationsupport@emblemhealth.com).

You can use this link at any time to return to the portal:  
[Sign In](#).

We're committed to supporting our partnership.

David Notari  
Senior Vice President Of Sales and Account Management  
EmblemHealth

-----

Scott Ushkowitz  
Vice President of Medicare Sales  
ConnectiCare | EmblemHealth

*This email is valid for the next 7 days. Please make sure to complete your account setup during that time. Do not reply to this email. It is an unmonitored account.*

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# WELCOME TO YOUR DASHBOARD

EmblemHealth

Client Name

Book of Business Commissions Billing Quotes Applications Renewals Resources

News

EmblemHealth Role Permissions Table [Read More](#)

Broker Dashboard

Line of Business

- Small Group
- Small Group
- Large Group
- Individual
- Medicare

Welcome to the EmblemHealth Broker Portal

Easy access to the tools and resources you need to grow your business, and take care of your clients.

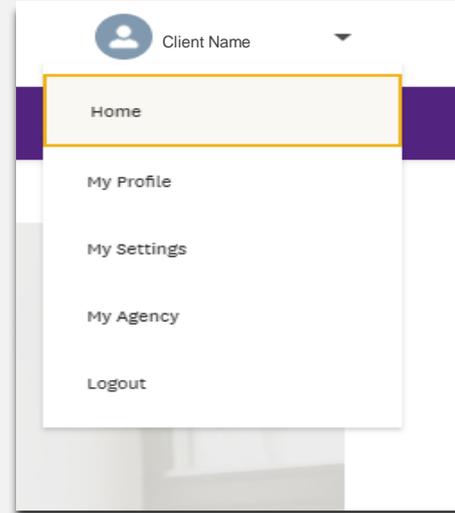
Type of Plan [Go](#)

You can now enroll your clients directly from the Select Plans page; just pick the type of plan above to continue.

- Key broker topics are at the top – no scrolling needed
- Dashboard features news and quick access to the different lines of business you manage.



# WELCOME TO YOUR DASHBOARD



- Click your name in the top right corner to access your **profile**, personal **settings** and **agency** information.
- If you are a principal user or general agent, **My Agency** is where you set up your organization's various users, assigning them permissions and privileges on the broker website. For detailed instructions, please view [Help and Support](#) .
- Please refer to the [roles and permissions](#) in the Appendix to help you set up your users.



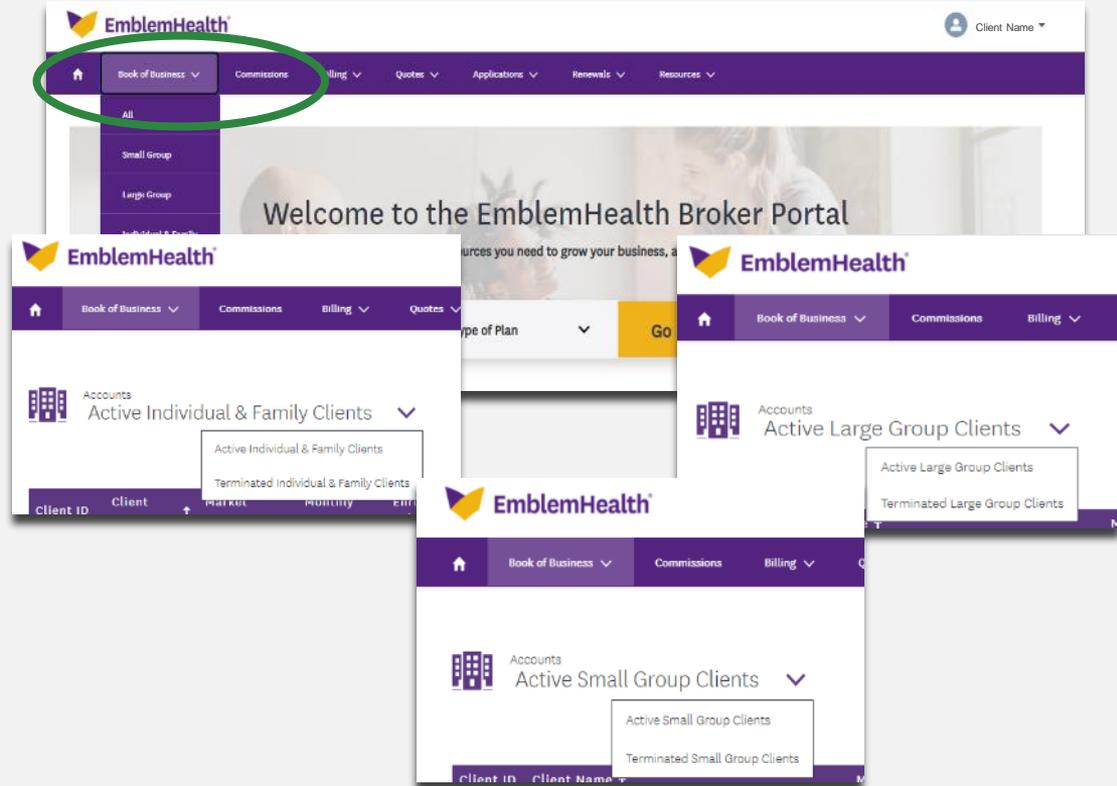
# MENU HIGHLIGHTS- BOOK OF BUSINESS

- Find details about your active and terminated clients in these segments:\*

  - Small Group
  - Large Group
  - Individual and family (under 65)
  - Medicare – This choice will take you to Evolve, a secure website that you have already been using.

- You can also track all the transactions you or anyone in your organization may have made on the broker website.

**Tip:** Click on arrows, like > or V, to reveal more choices.



# MENU HIGHLIGHTS- BOOK OF BUSINESS

The screenshot shows the EmblemHealth Book of Business interface for 'Active Small Group Clients'. The top navigation bar includes 'Book of Business', 'Commissions', 'Billing', 'Quotes', 'Applications', 'Renewals', and 'Resources'. Below the navigation, there is a search bar with an 'Export to Excel' button and a 'Search' button. The table header row is highlighted in purple and contains the following columns: Client ID, Client Name (with an upward arrow), Monthly Premium, Enrolled Subscribers, Enrolled Dependents, Original Effective Date, Group Renewal Date, and State.

The screenshot shows the EmblemHealth Book of Business interface for 'Active Large Group Clients'. The search bar and 'Search' button are circled in yellow. A yellow arrow points from this search bar towards the text 'Use the search function to quickly find groups in larger books of business.' The table header row is highlighted in purple and contains the following columns: Client ID, Client Name (with an upward arrow), Monthly Premium, Enrolled Subscribers, Enrolled Dependents, Original Effective Date, Group Renewal Date, and State.

The screenshot shows the EmblemHealth Book of Business interface for 'Active Individual & Family Clients'. The search bar and 'Search' button are highlighted. The table header row is highlighted in purple and contains the following columns: Client ID, Client Name (with an upward arrow), Market Segment, Monthly Premium, Enrolled Subscribers, Enrolled Dependents, Original Effective Date, Coverage Start Date, Coverage Termination Date, Renewal Date, State, and Medicare Opportunity.

- Each header row allows you to sort in ascending or descending order.
- Select your client's **Client ID** number to access more details for a specific client, such as:
  - Effective date for groups
  - Contact information for individual clients



Use the search function to quickly find groups in larger books of business.

**Tip:** Move your cursor along the data fields in a table to access the links for more details.



# MENU HIGHLIGHTS- BOOK OF BUSINESS, CLIENT DETAILS FOR GROUPS

The screenshot displays the 'Client Details' interface for a group. On the left is a sidebar with the following navigation items: 'Group Primary Contact Information', 'Agent Summary', 'Group Plan Summary', 'Group Documents', and 'List of Sub-Groups'. The main content area is titled 'Small Group Client Details' and includes a breadcrumb 'Small Group Book of Business > Group'. It features a 'Client Details' tab (active) and a 'Billing' tab. The 'Client Details' section contains the following information:

<b>Client Address</b> 123 Client Avenue Client City, NY 00000	<b>Tax Id</b> XXXXXXXX
<b>Monthly Premium</b> \$0,000	<b>Enrolled Subscribers</b> 0
<b>Enrolled Dependents</b> 0	<b>New Hire waiting Period</b> 0

Additional details shown include: Original Effective Date (06/01/2019), Coverage End Date, Status (Active), and SIC Code. A 'Client Actions' dropdown menu is visible in the top right corner of the main content area.

- Under **Client Details** for large groups, you can view:
  - Details, such as effective date, client roster, enrolled dependents, monthly premium and primary contact information
  - Agent summary
  - Group plan summary, including the ability to download summary of benefits coverage or summary of benefits
  - Group documents
  - List of sub-groups
- Under the **List of sub-groups**, you can select the ID number on the table to display the subscribers covered under the plan and check what medical and dental plans the client may have.



# MENU HIGHLIGHTS- BOOK OF BUSINESS, CLIENT DETAILS FOR GROUPS

EmblemHealth

Reigo Thomas

Book of Business Commissions Billing Quotes Applications Renewals Resources

Small Group Client Details

Client Group Name- XXXXXXXX

**Client Details** Billing

Client Address  
123 Client Avenue  
Client City, NY 00000

Monthly Premium  
\$0.000

Enrolled Dependents  
0

Original Effective Date  
06/01/2019

Coverage End Date

Tax Id  
XXXXXXXXXX

Enrolled Subscribers  
0

New Hire waiting Period  
0

Coverage Start Date

Termination Date

Client Actions

- Add/Update SIC code
- Update POC
- Add Subscriber
- Export Employee Roster

- The **Client Details** page is where you can add subscribers for an employer-sponsored plan. Open the drop-down menu next to **Client Actions**.



# MENU HIGHLIGHTS- BOOK OF BUSINESS, SUB-GROUP CLIENT DETAILS

Sub-group Client Summary

Client Group Name- XXXXXXXX

**Client Details** Billing

Tax Id  
XXXXXXXXXX

Primary Phone & Extension  
555-555-5555

Coverage Start Date

Total Number of Subscribers  
0

Termination Date

Primary Contact Email Address  
clientemail@email.com

Status  
Active

Coverage End Date

Total Number of Dependents  
0

Primary Address  
123 Client Avenue  
Client City, NY 00000

Sub-group Client Details

Subscribers Members Medical Plans Dental Plans Documents

Search

Member Id	Name ↑	Date Of Birth	SSN	Gender	Relationship To Subscriber	Coverage Start Date	Coverage End Date	Termination Date	Original Effective Date	Status
-----------	--------	---------------	-----	--------	----------------------------	---------------------	-------------------	------------------	-------------------------	--------

- Under **Sub-group client details**, you can view all the subscribers covered by an employer-sponsored plan.
- In the table for **Subscribers**, select a member ID to find details about that subscriber and perform the following functions:
  - Add dependent
  - Change subscriber name, marital status, subscriber address, PCP and covered plans
  - Order medical and/or dental ID cards
  - Cancel (terminate) subscriber and/or their medical coverage, dental coverage and health savings account
- You can also check a subscriber's plan name, dependent information and additional insurance; view and print a temporary ID card; and request a permanent ID card be mailed.

**Tip:** Need to find a subscriber fast? Simply use the **Search** box.



# MENU HIGHLIGHTS- CLIENT DETAILS FOR INDIVIDUALS

- Under **Client Details** for individual and family, you can:

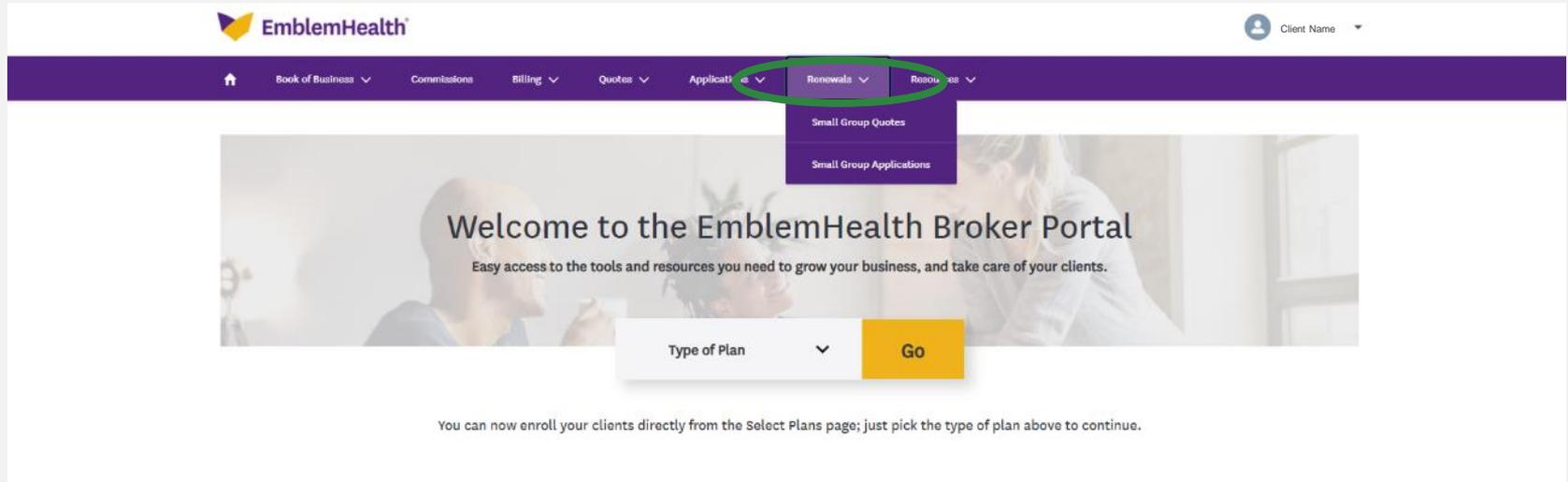
- Add dependent
- Change name, marital status, address or PCP
- Order medical and/or dental ID cards
- Renew coverage
- Terminate subscriber, medical coverage and dental coverage

- You can also view:

- Plan documents and download summary of benefits of coverage or summary of benefits
- Dependents covered under the subscriber
- Additional insurance
- A member's ID card and print a temporary one, and/or request a permanent card to be mailed



# MENU HIGHLIGHTS- SMALL GROUP RENEWALS



The screenshot displays the EmblemHealth Broker Portal interface. At the top left is the EmblemHealth logo. On the top right, there is a user profile icon labeled "Client Name". A dark purple navigation bar contains several menu items: Home, Book of Business, Commissions, Billing, Quotes, Applications, Renewals, and Resources. The "Renewals" menu item is circled in green, and its dropdown menu is open, showing "Small Group Quotes" and "Small Group Applications". Below the navigation bar is a large banner with a background image of three people in a meeting. The banner text reads: "Welcome to the EmblemHealth Broker Portal" and "Easy access to the tools and resources you need to grow your business, and take care of your clients." Below the banner is a "Type of Plan" dropdown menu and a yellow "Go" button. At the bottom of the banner area, a message states: "You can now enroll your clients directly from the Select Plans page; just pick the type of plan above to continue."



# MENU HIGHLIGHTS- SMALL AND LARGE GROUP RENEWAL LETTERS

The screenshot shows the EmblemHealth web application interface. At the top, there is a search bar and a user profile icon labeled 'Client Name'. Below this is a navigation menu with options: 'Book of Business', 'Billing', 'Commissions', 'Quotes', and 'Resources'. The main content area is titled 'Sub-group Client Details'. It features a horizontal menu with tabs: 'Subscribers', 'Medical Plans', 'Dental Plans', and 'Documents'. The 'Documents' tab is highlighted with a green circle. To the right of the tabs is a search bar with a 'Search' button. Below the tabs is a table with two columns: 'Document Name ↑' and 'Category'. The table contains five rows of data. The first four rows have a 'Download PDF' button next to the category. The fifth row has a 'Download PDF' button that is highlighted in grey. At the bottom left of the table, it says 'Total Records: 5'.

Document Name ↑	Category
1100998001110099800109202019_173 (9-56021843).pdf	HIP Renewal Letter
1100998001110099800109212018_10 (9-51779636).pdf	HIP Renewal Letter
1100998001110099800109212018_10 (9-53849436).pdf	HIP Renewal Letter
1100998001110099800109212018_10 (9-55071057).pdf	HIP Renewal Letter
HIP NO GUARANTEE_Part268 (9-51254184).pdf	Prior Approval

- On sub-group client details, click the Documents tab.
- Click on the down arrow to the right of the category to download it as a PDF.

\*Note, must be on sub-group client details screen for renewal letters. Renewal letters are not available at the group level.



# MENU HIGHLIGHTS- LARGE GROUP: OTHER DOCUMENTS ARE AVAILABLE TO DOWNLOAD ON THE GROUP LEVEL

The screenshot displays the EmblemHealth web application interface. At the top left is the EmblemHealth logo. To its right is a search bar and a user profile icon labeled "Client Name". Below this is a dark purple navigation bar with a home icon and several menu items: "Book of Business", "Billing", "Commissions", "Quotes", "Applications", and "Resources".

The main content area contains several expandable sections:

- > Group Primary Contact Information
- > Agent Summary
- > Group Plan Summary
- ▼ Group Documents

Under the "Group Documents" section, there is a search bar with a "Search" button. Below this is a table with the following data:

Document Name ↑	Category
Creditable coverage letter	Letters
Legacy_Discontinuance Letter Test file	Discontinuance Letter
Legacy_Prior Approval Test file	Prior Approval
Legacy_Renewal letter Test file	Renewal Letter

At the bottom of the table, it says "Total Records: 4". A "Download PDF" button is visible next to the "Discontinuance Letter" category. Below the table is another expandable section: "▼ List of Sub-Groups".



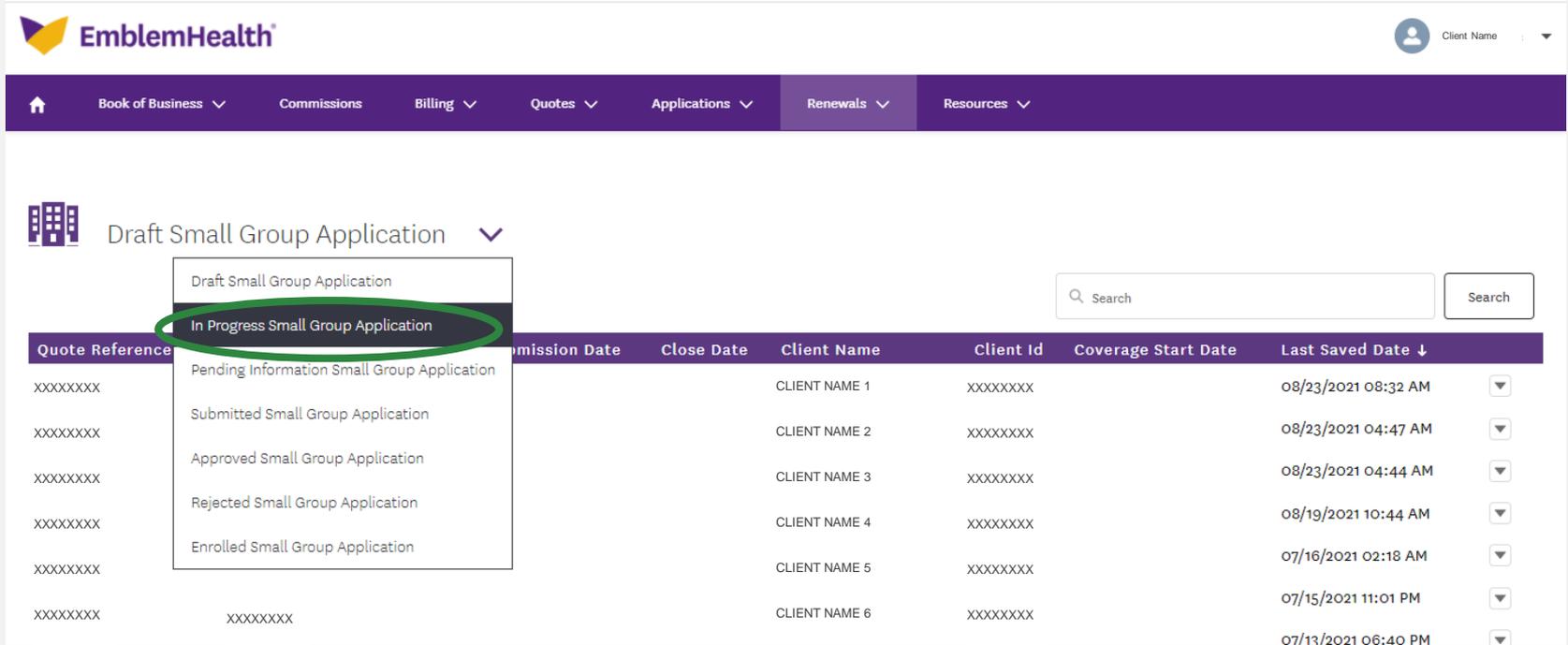
# MENU HIGHLIGHTS- SMALL GROUP QUOTES

The screenshot displays the EmblemHealth web application interface. At the top, the logo and 'EmblemHealth' text are on the left, and a user profile icon with 'Client Name' is on the right. A dark purple navigation bar contains several menu items: Home, Book of Business, Commissions, Billing, Quotes, Applications, Renewals, and Resources. Below this, the main content area features a section titled 'In Review Small Group Quotes' with a dropdown arrow. A search bar with a magnifying glass icon and the text 'Search' is positioned to the right. A table with 11 columns is shown below. The first column is 'Renewal Quote Number', the second is 'Renewal Effective', and the third is a dropdown menu. The dropdown menu is open, showing three options: 'In Review Small Group Quotes', 'Approved Small Group Quotes' (which is circled in green), and 'Closed Small Group Quotes'. Below the dropdown, the table contains five rows of data. The first row has a 'No' status in the third column, while the other four rows have 'No' in the second column. The table columns are: Renewal Quote Number, Renewal Effective, Status, Client ID, Client Name, Current Premium, Renewal Premium, Percentage Change, Enrolled Subscribers, Enrolled Dependents, and State.

Renewal Quote Number	Renewal Effective		Client ID	Client Name	Current Premium	Renewal Premium	Percentage Change	Enrolled Subscribers	Enrolled Dependents	State
xxxxxxx	2021-10-01	In Review Small Group Quotes	xxxxxxx	GROUP xxxx	\$0,000	\$0,000	0%	0	0	NY
xxxxxxx	2021-10-01	No	xxxxxxx	GROUP xxxx	\$0,000	\$0,000	0%	0	0	NY
xxxxxxx	2021-10-01	No	xxxxxxx	GROUP xxxx	\$0,000	\$0,000	0%	0	0	NY
xxxxxxx	2021-10-01	No	xxxxxxx	GROUP xxxx	\$0,000	\$0,000	0%	0	0	NY
xxxxxxx	2021-10-01	No	xxxxxxx	GROUP xxxx	\$0,000	\$0,000	0%	0	0	NY



# MENU HIGHLIGHTS- SMALL GROUP APPLICATION



The screenshot shows the EmblemHealth application interface. At the top left is the EmblemHealth logo. On the right, there is a user profile icon labeled 'Client Name'. Below the logo is a navigation bar with several menu items: Home, Book of Business, Commissions, Billing, Quotes, Applications, Renewals, and Resources. The 'Applications' menu is expanded, showing a sub-menu for 'Draft Small Group Application'. This sub-menu is further expanded to show a list of application statuses: Draft Small Group Application, In Progress Small Group Application (highlighted with a green circle), Pending Information Small Group Application, Submitted Small Group Application, Approved Small Group Application, Rejected Small Group Application, and Enrolled Small Group Application. To the right of the sub-menu is a search bar with a search icon and the text 'Search', and a 'Search' button. Below the sub-menu is a table with the following columns: Quote Reference, Submission Date, Close Date, Client Name, Client Id, Coverage Start Date, and Last Saved Date. The table contains six rows of data, each with a quote reference (represented by 'xxxxxxx'), a submission date, a close date, a client name, a client ID, a coverage start date, and a last saved date. The first row has a last saved date of '08/23/2021 08:32 AM', the second '08/23/2021 04:47 AM', the third '08/23/2021 04:44 AM', the fourth '08/19/2021 10:44 AM', the fifth '07/16/2021 02:18 AM', and the sixth '07/15/2021 11:01 PM'. The last row has a last saved date of '07/13/2021 06:40 PM'.

EmblemHealth

Client Name

Home Book of Business Commissions Billing Quotes Applications Renewals Resources

Draft Small Group Application

Draft Small Group Application

In Progress Small Group Application

Pending Information Small Group Application

Submitted Small Group Application

Approved Small Group Application

Rejected Small Group Application

Enrolled Small Group Application

Search Search

Quote Reference	Submission Date	Close Date	Client Name	Client Id	Coverage Start Date	Last Saved Date ↓
xxxxxxx			CLIENT NAME 1	xxxxxxx		08/23/2021 08:32 AM
xxxxxxx			CLIENT NAME 2	xxxxxxx		08/23/2021 04:47 AM
xxxxxxx			CLIENT NAME 3	xxxxxxx		08/23/2021 04:44 AM
xxxxxxx			CLIENT NAME 4	xxxxxxx		08/19/2021 10:44 AM
xxxxxxx			CLIENT NAME 5	xxxxxxx		07/16/2021 02:18 AM
xxxxxxx			CLIENT NAME 6	xxxxxxx		07/15/2021 11:01 PM
xxxxxxx	xxxxxxx					07/13/2021 06:40 PM



# MENU HIGHLIGHTS- MODIFY RENEWAL QUOTE AND DOWNLOAD QUOTE PDF



Client Name  ▼

Home Book of Business ▼ Commissions Billing ▼ Quotes ▼ Applications ▼ Renewals ▼ Resources ▼

 In Review Small Group Quotes ▼

Renewal Quote Number	Renewal Effective Date	Renewed With Changes	Client ID	Client Name	Current Premium	Renewal Premium	Percentage Change	Enrolled Subscribers	Enrolled Dependents	State
XXXXXXXX	2021-10-01	No	XXXXXXXX	CLIENT NAME 1	\$0,000	\$0,000	0%	3	1	NY 
XXXXXXXX	2021-10-01	No	XXXXXXXX	CLIENT NAME 2	\$0,000	\$0,000	0%	2	0	NY 
XXXXXXXX	2021-10-01	No	XXXXXXXX	CLIENT NAME 3	\$0,000	\$0,000	0%	1	1	NY 
XXXXXXXX	2021-10-01	No	XXXXXXXX	CLIENT NAME 4	\$0,000	\$0,000	0%	1	2	NY 

*Note: In the second row, the dropdown menu is open, showing "Begin/Modify Renewal Quote" and "Download Quote PDF" options, which are circled in green.*



# MENU HIGHLIGHTS- RESUME SMALL GROUP APPLICATION

The screenshot displays the EmblemHealth application management interface. At the top, there is a navigation bar with the EmblemHealth logo on the left and a user profile icon labeled 'Client Name' on the right. Below the navigation bar is a secondary menu with options: Home, Book of Business, Commissions, Billing, Quotes, Applications, Renewals, and Resources. The main content area features a 'Draft Small Group Application' section with a search bar and a search button. Below this is a table with the following columns: Quote Reference Id, Application Reference Id, Submission Date, Close Date, Client Name, Client Id, Coverage Start Date, and Last Saved Date. The table contains three rows of data. The second row's 'Last Saved Date' cell is highlighted with a green circle, and a dropdown menu is open, showing the option 'Resume Application'.

Quote Reference Id	Application Reference Id	Submission Date	Close Date	Client Name	Client Id	Coverage Start Date	Last Saved Date ↓
XXXXXXXX	XXXXXXXX			CLIENT NAME 1	XXXXXXXX		08/23/2021 08:32 AM
XXXXXXXX	XXXXXXXX			CLIENT NAME 2	XXXXXXXX		08/23/2021 04:44 AM
XXXXXXXX	XXXXXXXX			CLIENT NAME 3	XXXXXXXX		08/23/2021 04:44 AM



# MENU HIGHLIGHTS- RENEW SMALL GROUP COVERAGE FROM CLIENT DETAILS IN BOOK OF BUSINESS

The screenshot displays the EmblemHealth 'Book of Business' interface. At the top, the navigation bar includes 'Book of Business', 'Commissions', 'Billing', 'Quotes', 'Applications', 'Renewals', and 'Resources'. The main content area is titled 'Small Group Client Details' and shows 'Client Group Name- XXXXXXXX'. A message on the right states: 'Please renew your coverage. Your coverage is about to expire.' Below this, there are tabs for 'Client Details' (selected) and 'Billing'. The client details are organized into two columns:

Client Address	Tax Id
123 Client Avenue Client City, NY 00000	xxxxxxx
Monthly Premium	Enrolled Subscribers
\$0,000	3
Enrolled Dependents	New Hire waiting Period
1	0
Original Effective Date	Coverage Start Date
10/01/2018	10/01/2020
Coverage End Date	Termination Date

On the right side, a 'Client Actions' dropdown menu is open, listing several options: 'Add/Update SIC code', 'Update POC', 'Add Subscriber', 'Export Employee Roster', and 'Renew Coverage'. The 'Renew Coverage' option is highlighted with a green oval.



# MENU HIGHLIGHTS- COMMISSIONS

View your commissions:

- Year-to-date summary
- Monthly statements
- Statement details under agent summary or individual and group clients

For Medicare Advantage, the **Commissions** button will go to Evolve, a secure website brokers are now using.

The screenshot shows the EmblemHealth Commissions page for July 2021. It includes a 'Commissions Summary for July 2021' section with the following data:

Total Commission	Total Premium
\$223.88	\$12,179.40

Below this is a section titled 'Client Group Name Commissions Statements for July 2021' with a table of commission statements:

Reference ID	Broker Name	Broker Code	Statement Commission Amount	Statement Premium Amount	Statement Type	Download PDF
XXXXXXXXXXXXXXXXXX	CLIENT NAME	XXXXXXXXXXXXX #106-44	\$5,603.09		Standard Commission	
XXXXXXXXXXXXXXXXXX	CLIENT NAME	XXXXXXXXXXXXX #116-44	\$6,577.38		General Agent Commission	

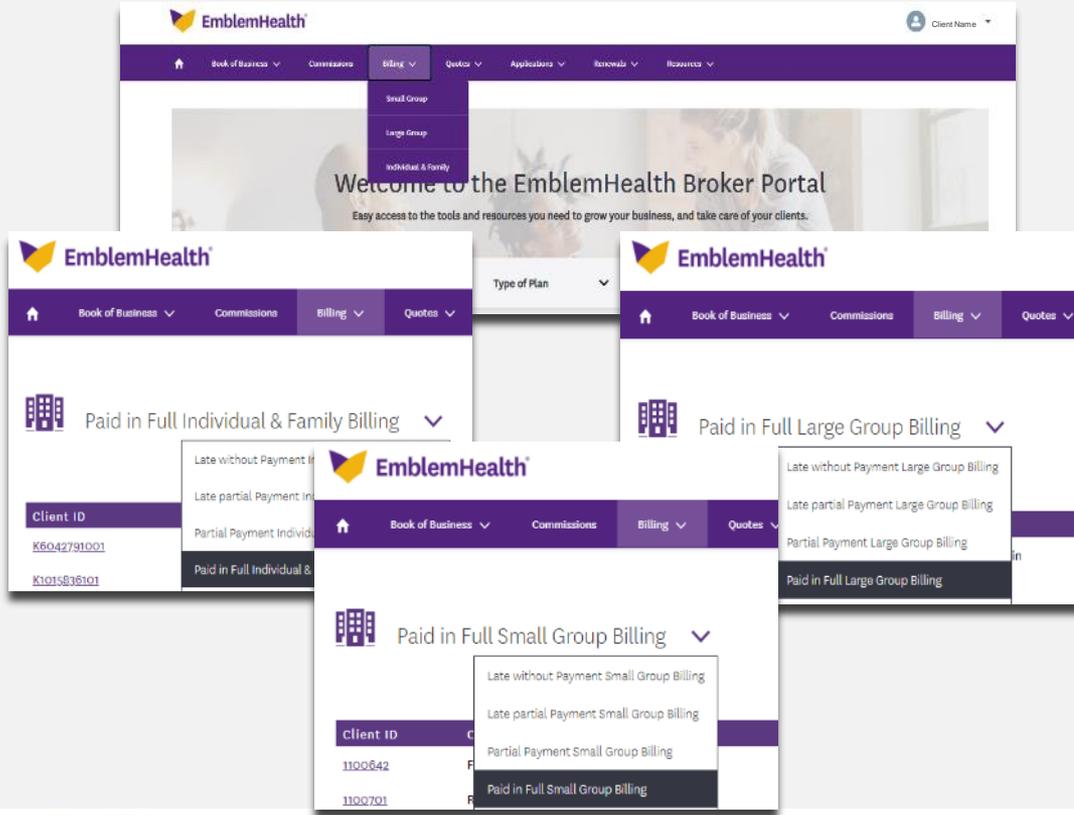
The screenshot shows the EmblemHealth Commissions page with a 'Year to Date Summary' section. It includes a line chart titled 'Commissions Summary' showing commissions over the last 12 months (Jul 2020 to Jul 2021). The Y-axis ranges from \$0.00 to \$250,000.00. The chart shows a peak in November 2020 and another peak in January 2021. A legend indicates 'Total Commission'.

Below the chart is a 'Year to Date Summary' section with the following data:

YTD Total Commission Amount	YTD Total Premium Amount
\$572,585.80	\$67,030,074.50



# MENU HIGHLIGHTS- BILLING



- View billing details for your clients with the following plans:
  - Small group
  - Large group
  - Individual & family
- Under details for each segment, you can see which clients are:
  - Late with or without partial payment
  - Paid partially or in full
  - Still unpaid
- Select the **Client ID** to find billing details for that client



# MENU HIGHLIGHTS- LARGE GROUP BILLING

Large Group Client Details  
Client Group Name- XXXXXXXX

Client Details **Billing**

Billing Account: XXXXXXXX  
Billing Level: Group  
Invoice Number: XXXXXXXX  
Invoice Date: 06/10/2021  
Premium Amount: \$46,207.00  
Total Amount Due: \$46,207.00  
Days Past Due: 80  
Last Payment Amount  
Billing Frequency: Monthly

EmblemHealth  
Book of Business | Commissions | Billing | Quotes | Applications | Renewals | Resources

Large Group Book of Business > Group > Sub-group  
Sub-group Client Summary  
Client Group Name- XXXXXXXX

Client Details **Billing**

Please see Group details for additional billing information

- Billing details are available in the group or sub-group section of your client details page. Go to the:
  - **Billing** tab under the client details page, or
  - **List of Sub-Groups** to select the client ID and then the **Billing** tab.
- Billing details will include invoice and payment history (last 24 months).



# MENU HIGHLIGHTS- SMALL GROUP BILLING

Small Group Client Details

Client Group Name- XXXXXXXX

Client Details **Billing**

**Billing Account**  
XXXXXXXXXX

**Invoice Number**  
XXXXXXXXXX

**Premium Amount**  
\$23,001.76

**Total Amount Due**  
\$23,001.76

**Days Past Due**  
83

**Last Payment Amount**

**Billing Frequency**  
Monthly

**Billing Level**  
Group

**Invoice Date**  
05/10/2021

**Adjustment Amount**

Sub-group Client Summary

Client Group Name- XXXXXXXX

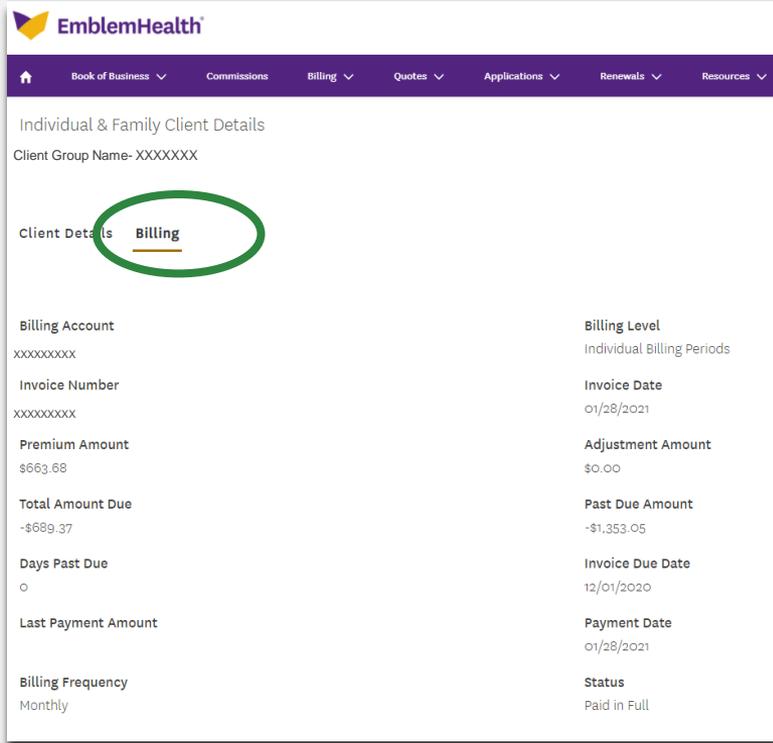
Client Details **Billing**

**i** Please see Group details for additional billing information

- Billing details are available in the group or sub-group section of your client details page. Go to the:
  - **Billing** tab under the client details page, or
  - **List of Sub-Groups** to select the client ID and then the **Billing** tab.
- Billing details will include invoice and payment history (last 24 months).



# MENU HIGHLIGHTS- INDIVIDUAL BILLING



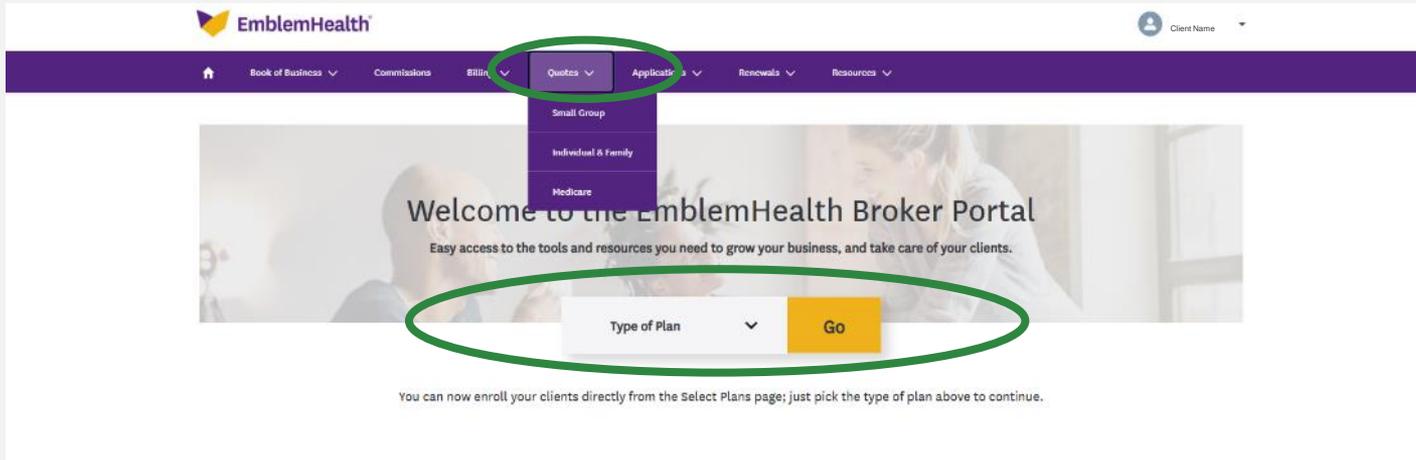
The screenshot displays the EmblemHealth client portal interface. At the top, there is a navigation bar with the EmblemHealth logo and a menu containing: Home, Book of Business, Commissions, Billing, Quotes, Applications, Renewals, and Resources. Below the navigation bar, the page title is "Individual & Family Client Details" and the client group name is "XXXXXXX". Under the "Client Details" section, the "Billing" tab is highlighted with a green circle. The main content area is divided into two columns of billing information:

<b>Billing Account</b> xxxxxxxx	<b>Billing Level</b> Individual Billing Periods
<b>Invoice Number</b> xxxxxxxx	<b>Invoice Date</b> 01/28/2021
<b>Premium Amount</b> \$663.68	<b>Adjustment Amount</b> \$0.00
<b>Total Amount Due</b> -\$689.37	<b>Past Due Amount</b> -\$1,353.05
<b>Days Past Due</b> 0	<b>Invoice Due Date</b> 12/01/2020
<b>Last Payment Amount</b>	<b>Payment Date</b> 01/28/2021
<b>Billing Frequency</b> Monthly	<b>Status</b> Paid in Full

- To view individual billing details, go to the **Billing** tab under client details.
- Billing details will be shown, including more information on invoice and payment history (last 24 months).



# MENU HIGHLIGHTS- QUOTES



- Use the **Create a Quote** section on the broker dashboard to generate quotes for your **Small Group**, **Individual & family**, and **Medicare** and clients. For large group clients, please contact your sales executive or account manager for assistance.
- Follow the on-screen prompts to complete the quoting process.
- View the quotes that are in review or have been accepted/closed under the **Quotes** section in the top menu. If a quote is still under review, you can download a PDF for your small group or individual clients. For individual clients, you can start the enrollment process right from the quotes section.



# MENU HIGHLIGHTS- APPLICATIONS

EmblemHealth

Client Name

Book of Business | Commissions | Billing | Quote | **Applications** | Renewals | Resources

Small Group  
Individual & Family  
Medicare

Welcome to the EmblemHealth Broker Portal  
Easy access to the tools and resources you need to grow your business, and take care of your clients.

Type of Plan | Go

You can now enroll your clients directly from the Select Plans page; just pick the type of plan above to continue.

- View applications for **Small group, Individual & family** and **Medicare** clients under this drop-down menu.
- For large group clients, please contact your sales executive or account manager for assistance.

EmblemHealth

Book of Business | Commissions | Billing | Quote | Applications

Submitted Small Group Application

Draft Small Group Application  
In Progress Small Group Application  
Submitted Small Group Application

Quote Reference Id	Submission Date
00050398	7/15/21

EmblemHealth

Book of Business | Commissions | Billing | Quote | Applications

Submitted Individual & Family Application

Draft Individual & Family Application  
Submitted Individual & Family Application

EmblemHealth

Book of Business | Commissions | Quote | Applications

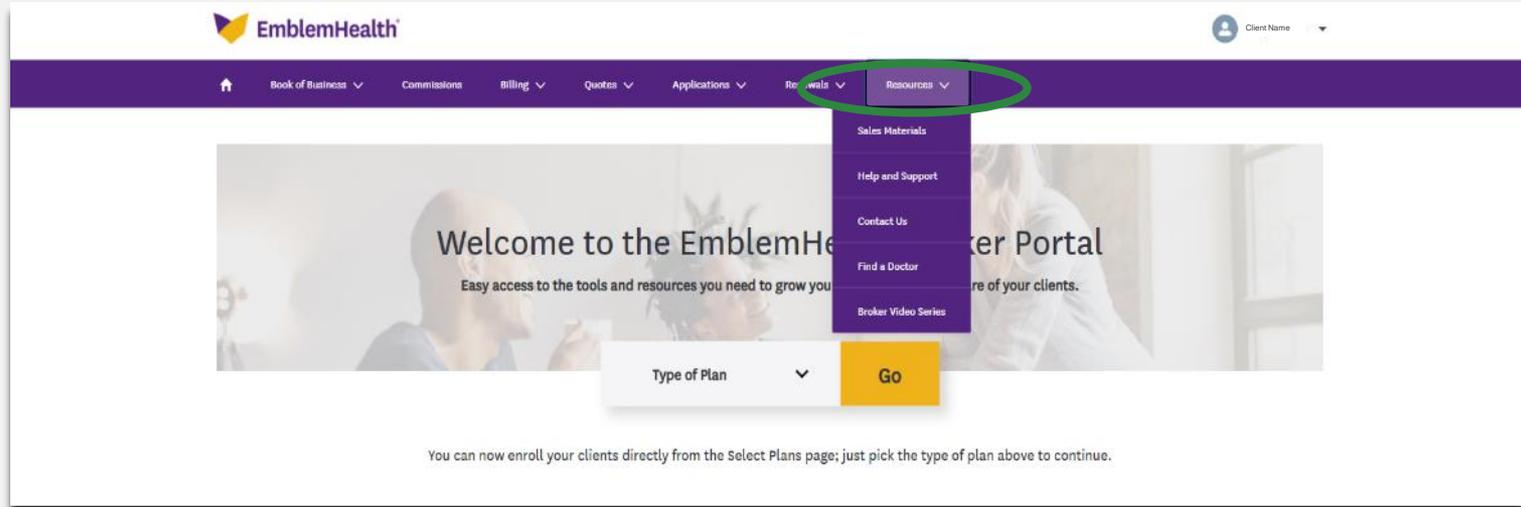
Submitted Medicare Application

Draft Medicare Application  
Submitted Medicare Application

Quote Reference Id	Submission Date
--------------------	-----------------



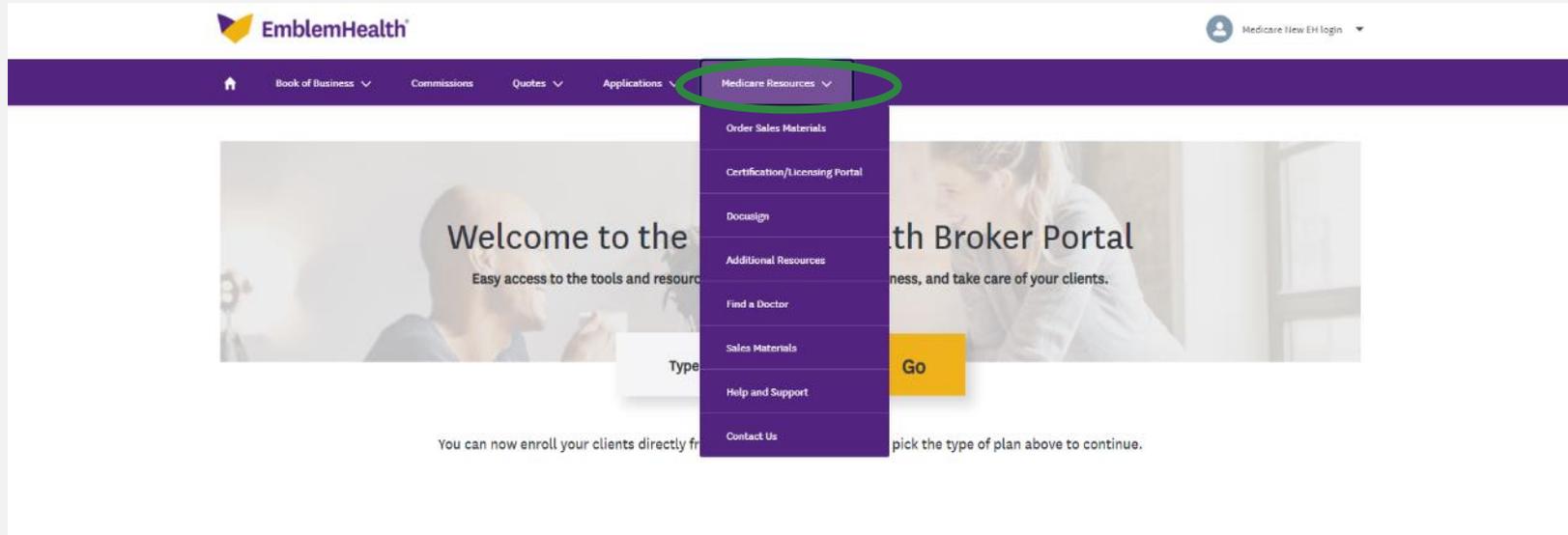
# MENU HIGHLIGHTS- RESOURCES



- Find **Resources** here, including sales materials, help and support, and how to contact us.
- If you still have questions, the [Help and Support](#) page has more detailed answers on how to navigate the secure broker website



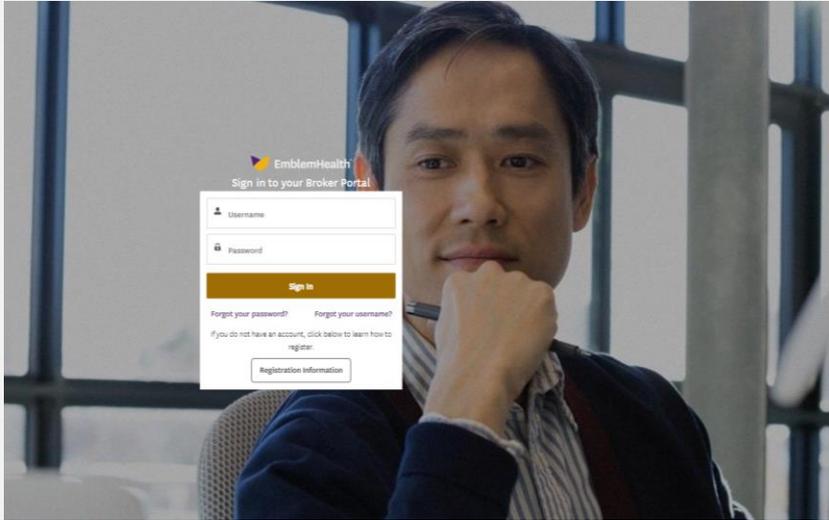
# MENU HIGHLIGHTS- MEDICARE RESOURCES



- Find **Resources** here, including how to get started on the broker portal, sales materials, help and support, and how to contact us.
- If you still have questions, the [Help and Support](#) page has more detailed answers on how to navigate the secure broker website



# A NOTE TO OUR MEDICARE BROKERS



- Use the links from the EmblemHealth website to visit the Evolve website for:
  - Tracking leads
  - Managing your book of business and commissions
- On the EmblemHealth secure broker website, you can **create quotes** or **enroll your Medicare clients**.



# APPENDIX

Additional resources for your reference

# ROLES AND PERMISSIONS FOR YOUR AGENCY USERS

*Note: Principal users and general agents can use the table in the next four pages to assign the right permission roles and permissions for their users.*

Roles/ Permissions → Screen/Menu ↓	Principal User (GA, Independent, TPA)	Admin User with Commission	Admin User without Commission	Agent/webuser	Billing User	Commissions User	Roster Management User	Enrollment User	Renewals User
<b>Home</b>	X	X	X	X	X	X	X	X	X
<b>Create Quote</b>	X	X	X	X				X	X
<b>Book of Business</b>	X	X	X	X	X	X	X	X	
<b>List of Accounts</b>	X	X	X	X	X	X	X	X	
<b>Account Detail</b>	X	X	X	X	X	X	X	X	
<b>Add Member</b>	X	X	X	X	X		X	X	
<b>Billing</b>	X	X	X	X	X	X	X		
<b>Billing History</b>	X	X	X	X	X	X	X		
<b>Sub-Group/Plans</b>	X	X	X	X	X	X	X	X	
<b>Sub- Group/Plan Details</b>	X	X	X	X	X	X	X	X	



# ROLES AND PERMISSIONS FOR YOUR AGENCY USERS

Roles/ Permissions → Screen/Menu ↓	Principal User (GA, Independent, TPA)	Admin User with Commission	Admin User without Commission	Agent/webuser	Billing User	Commissions User	Roster Management User	Enrollment User	Renewals User
<b>Employees</b>	X	X	X	X	X	X	X	X	
<b>Employee Dependent Detail</b>	X	X	X	X	X	X	X	X	
<b>Edit Member, Eligibility, QLE, PCP</b>	X	X	X	X			X	X	
<b>Documents (group- specific)</b>	X	X	X	X	X	X	X	X	
<b>Commissions</b>	X	X				X			
<b>List of Commissions</b>	X	X				X			
<b>Commissions Detail</b>	X	X				X			
<b>Agency Summary</b>	X	X				X			
<b>Client Summary</b>	X	X				X			



# ROLES AND PERMISSIONS FOR YOUR AGENCY USERS

Roles/ Permissions → Screen/Menu ↓	Principal User (GA, Independent, TPA)	Admin User with Commission	Admin User without Commission	Agent/webuser	Billing User	Commissions User	Roster Management User	Enrollment User	Renewals User
<b>Quotes</b>	X	X	X	X				X	X
<b>List of Quotes</b>	X	X	X	X				X	X
<b>Quote Details</b>	X	X	X	X				X	X
<b>Quote &amp; Enroll</b>	X	X	X	X				X	X
<b>Applications</b>	X	X	X	X				X	X
<b>Renewals</b>	X	X	X	X		X			X
<b>List of Groups</b>	X	X	X	X		X			X



# ROLES AND PERMISSIONS FOR YOUR AGENCY USERS

Roles/ Permissions → Screen/Menu ↓	Principal User (GA, Independent, TPA)	Admin User with Commission	Admin User without Commission	Agent/webuser	Billing User	Commissions User	Roster Management User	Enrollment User	Renewals User
<b>Resources</b>	X	X	X	X	X	X	X	X	X
<b>Help and Support</b>	X	X	X	X	X	X	X	X	X
<b>Profile</b>									
<b>My Profile</b>	X	X	X	X	X	X	X	X	X
<b>Edit Profile</b>	X	X	X	X	X	X	X	X	X
<b>Manage Users (Related tab)</b>	X	X							



**Thank you**

