

EmblemHealth Broker Portal

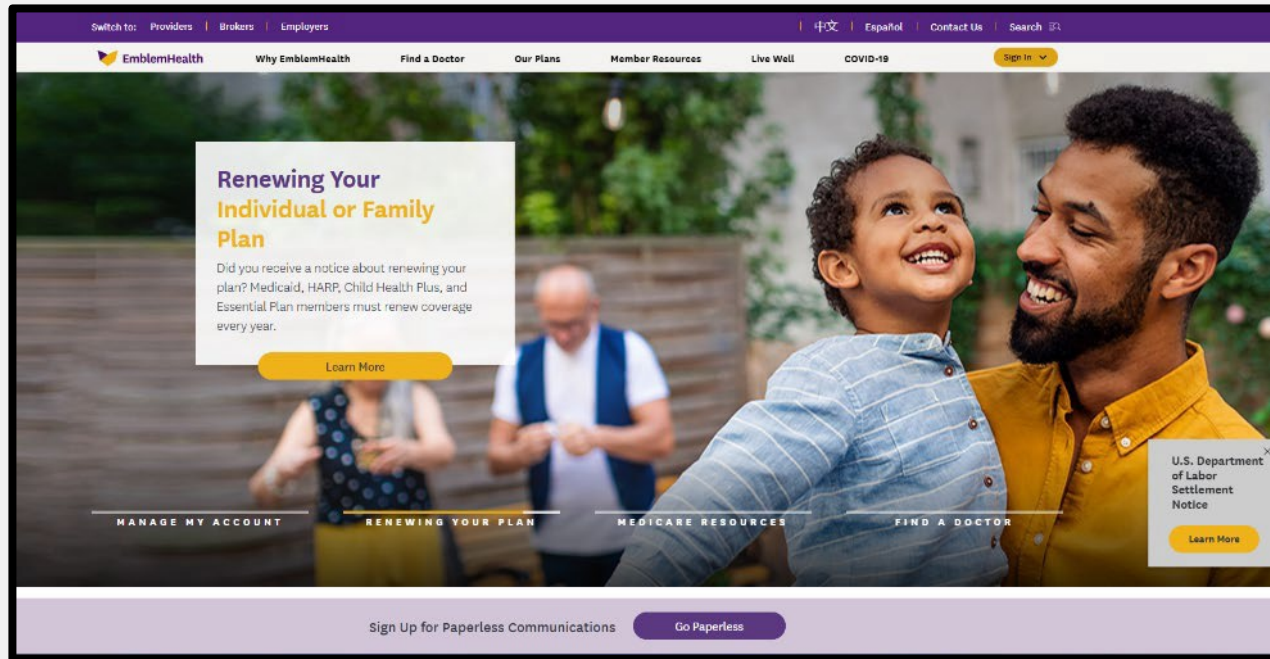
Portal Guide
2026



CONTENTS

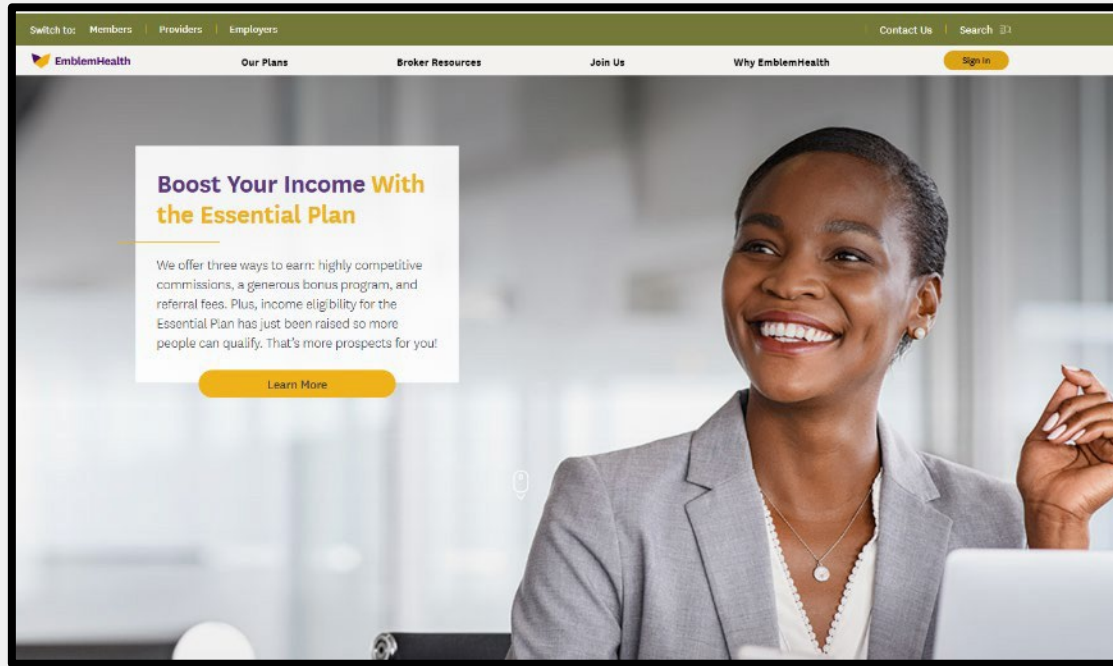
- Broker Portal Tour
- Access to resources, support

ACCESS



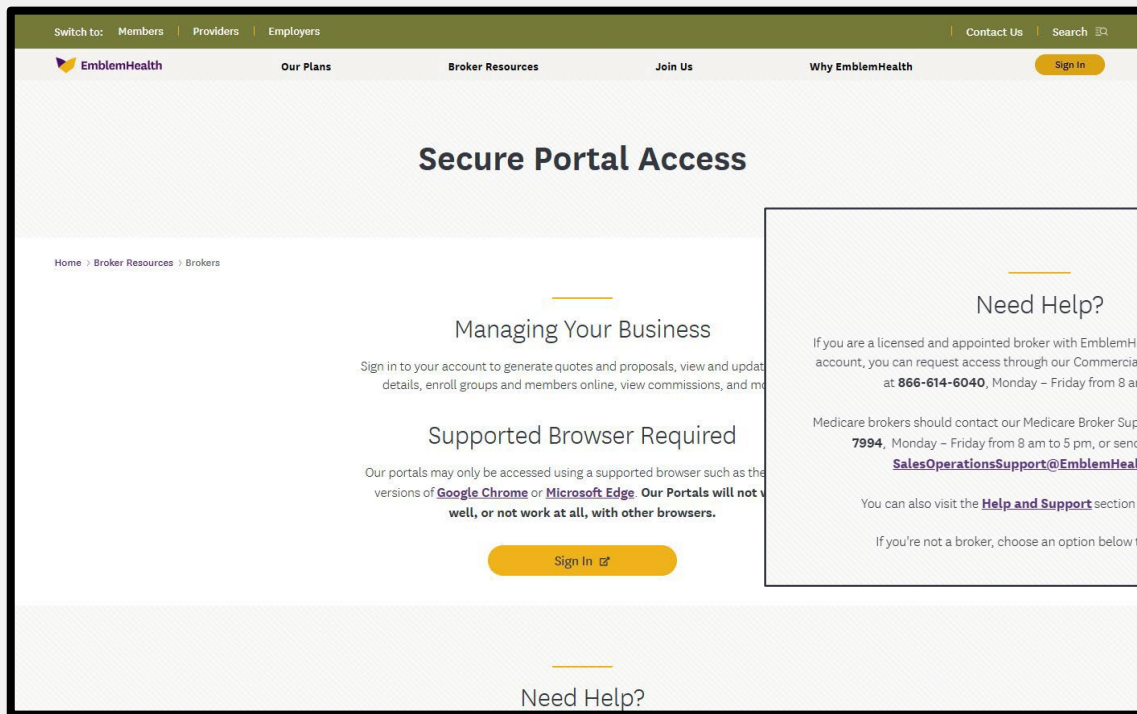
Access the EmblemHealth Broker
Portal by visiting
EmblemHealth.com

ACCESS



Select “Brokers” in the top menu

SIGN IN



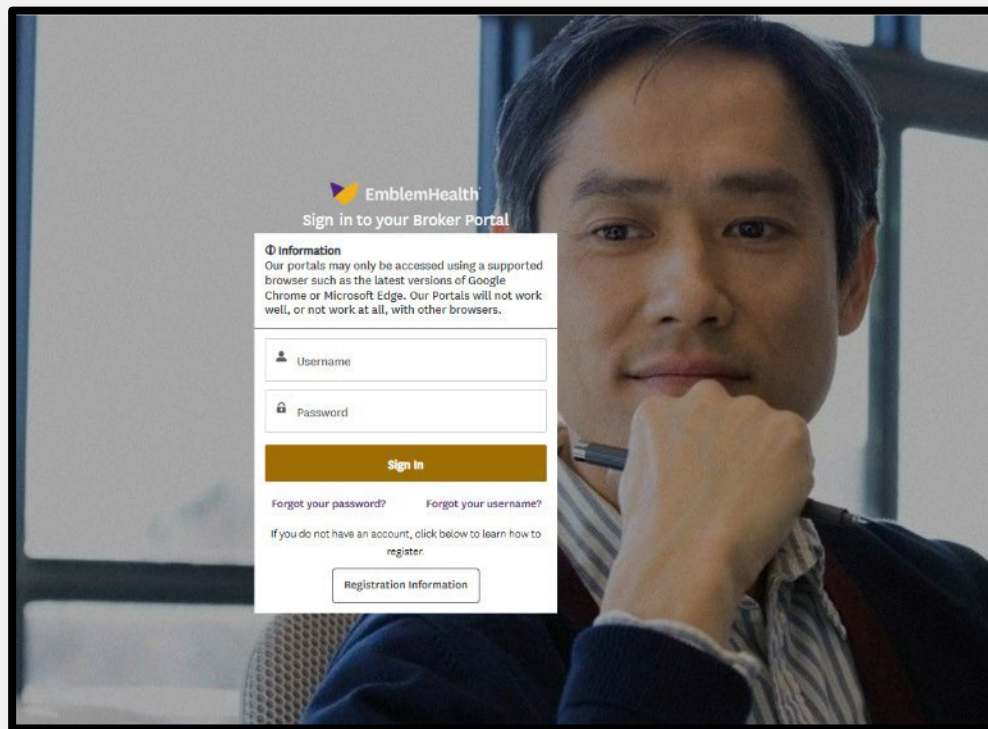
Sign in by selecting “Sign in” button

or

by accessing the Broker Portal directly

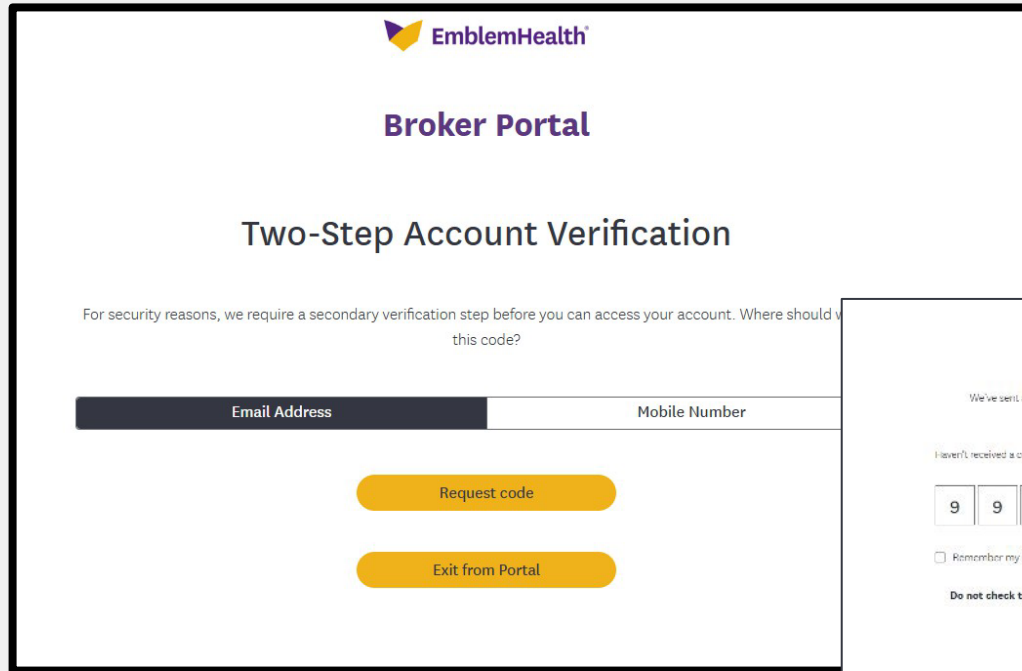
Contact broker services for help

SIGN IN (CONT'D)



Broker portal login screen

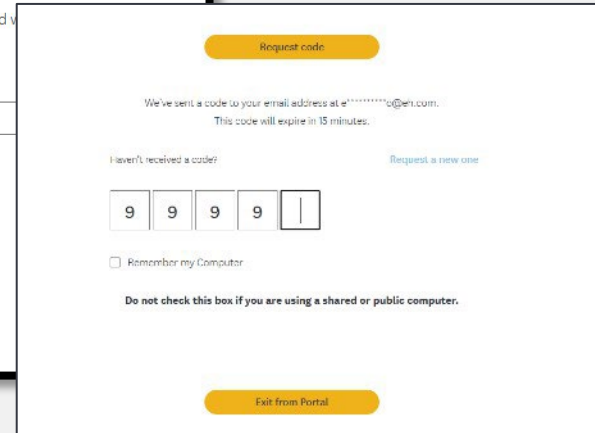
ACCESS - SECURITY



The main screen displays the EmblemHealth logo at the top, followed by the title 'Broker Portal' and 'Two-Step Account Verification'. A message states: 'For security reasons, we require a secondary verification step before you can access your account. Where should we send this code?'. Below this is a form with two input fields: 'Email Address' and 'Mobile Number'. At the bottom are two yellow buttons: 'Request code' and 'Exit from Portal'.

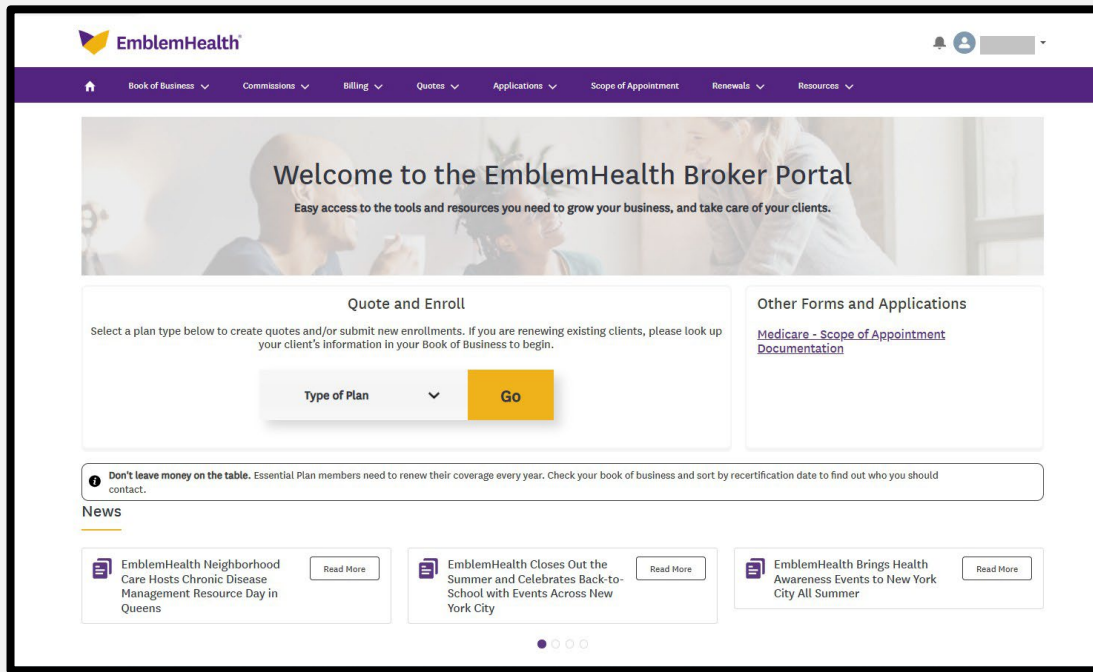
Improved security with two-step account verification

- Request and enter code to proceed
- Codes expire in 15 minutes
- Can request new code
- Option to Remember my Computer



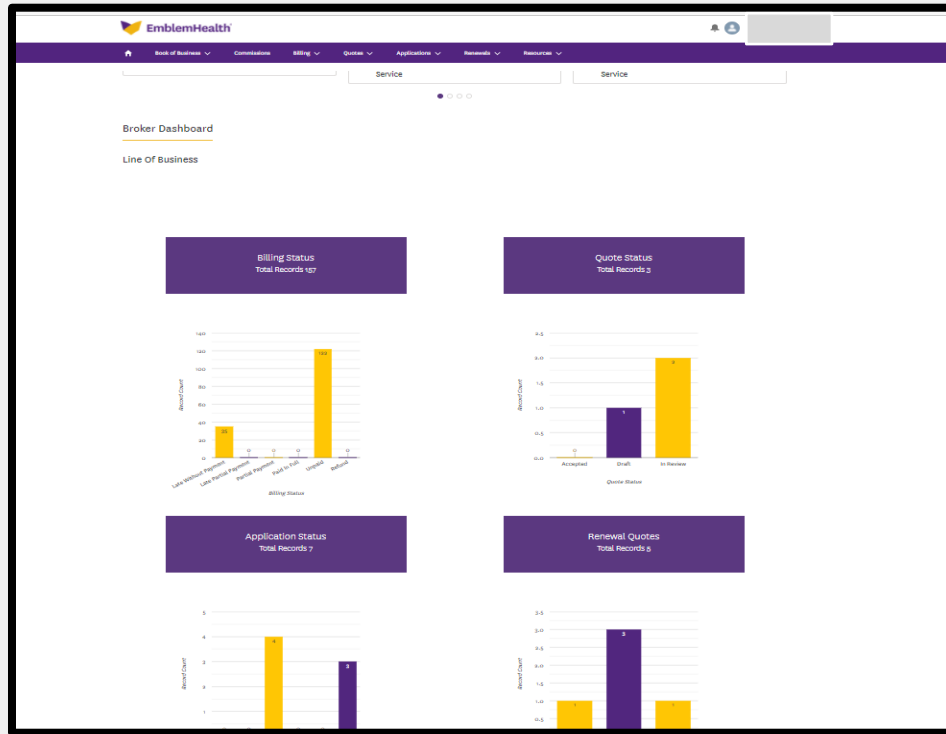
This screen shows the code entry step. It features a yellow 'Request code' button at the top. The message reads: 'We've sent a code to your email address at e*****@em.com. This code will expire in 15 minutes.' Below this, there are links for 'I haven't received a code?' and 'Request a new one'. A numeric input field contains the digits '9 9 9 9' followed by a vertical bar. There is a checkbox for 'Remember my Computer' with the instruction 'Do not check this box if you are using a shared or public computer.' at the bottom. A yellow 'Exit from Portal' button is at the very bottom.

BROKER DASHBOARD



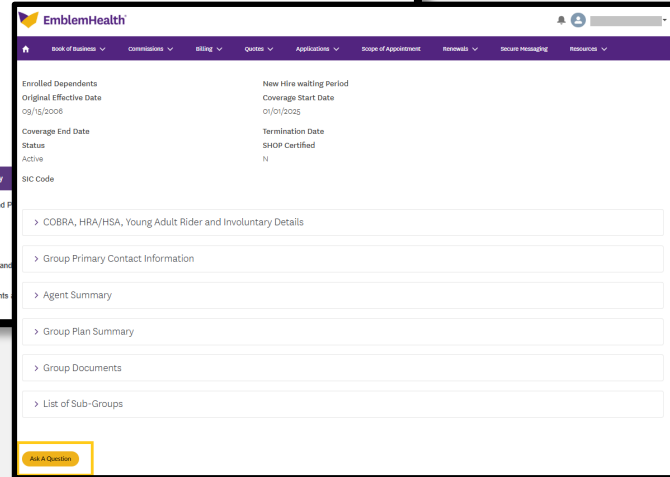
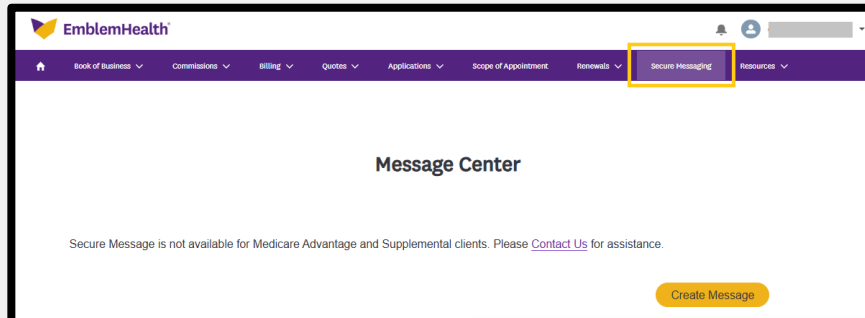
The Broker Dashboard (home page) gives brokers quick and easy access to important information and functionality

BROKER DASHBOARD



... including easy access to quotes, billing where applicable

BROKER SECURE MESSAGING & ASK A QUESTION



Broker Secure Messaging and Ask a Question were added in December 2024.

- Allows Brokers to send secure messages directly to clients for numerous topics. Messages are routed to designated queues and answered by trained staff. Makes communication easier and more efficient
- Accessible from the top navigation bar “Secure Messaging” label or “Ask a Question” button (only on group pages)
- Available for Individual, Small Group and Large Group
- From the Message Center page, user can:
 - click “Create Message” to start a new message
 - filter or search previously sent secure messages

BOOK OF BUSINESS - BILLING

EmblemHealth

Book of Business Commissions Billing Quotes Applications Scope of Appointment Renewals Resources

Individual & Family Client Details

Client Details **Billing**

Billing Account
[Redacted]

Invoice Number
[Redacted]

Billed Amount
Total Amount Due
Days Past Due

Last Payment Amount

Billing Frequency
Monthly

Billing Level
Individual Billing Periods

Invoice Date
10/03/2024

Adjustment Amount
Past Due Amount
Invoice Due Date
10/01/2024

Payment Date
10/03/2024

Status
Paid in Full

Invoice History

Export to Excel

Search

Invoice Number ↑	Invoice Date	Billed Amount	Total Amount Due	Invoice Due Date	Invoice Status
000000442501355	10/03/2024	\$0.00	\$0.00	10/01/2024	Paid in Full

Total Records: 1

Payment History

Client billing information, including:

- Billed amount
- Total amount due
- Amount and days past due
- Billing frequency
- Payment date
- Invoice History

Invoice history
Export to excel
Search

BOOK OF BUSINESS - BILLING

EmblemHealth: Hea... Sharepoint My Apps CCI eBusiness team... Find Care Services Self Service Center Your work - Jira Vlocity

EmblemHealth

Book of Business Commissions Billing Quotes Applications Scope of Appointment Renewals Resources

Billing Account
[Redacted]

Invoice Number
[Redacted]

Billed Amount
Total Amount Due
Days Past Due

Last Payment Amount

Billing Frequency
Monthly

Billing Level
Individual Billing Periods

Invoice Date
10/03/2024

Adjustment Amount
Past Due Amount
Invoice Due Date
10/01/2024

Payment Date
10/03/2024

Status
Paid in Full

▼ Invoice History

Search

Invoice Number ↑	Invoice Date	Billed Amount	Total Amount Due	Invoice Due Date	Invoice Status
	10/03/2024	\$0.00	\$0.00	10/01/2024	Paid in Full

Total Records: 1

Export to Excel

Full download history

Recent download history

Invoice History (1).xlsx
14.5 KB • 1 minute ago

Export to excel example

BOOK OF BUSINESS - TRANSACTION LOGS

EmblemHealth

Kayan Wong

Book of Business Commissions Billing Quotes Applications Scope of Appointment Renewals Resources

Most transactions will be visible in the portal two business days following the transaction.

Cases Transaction

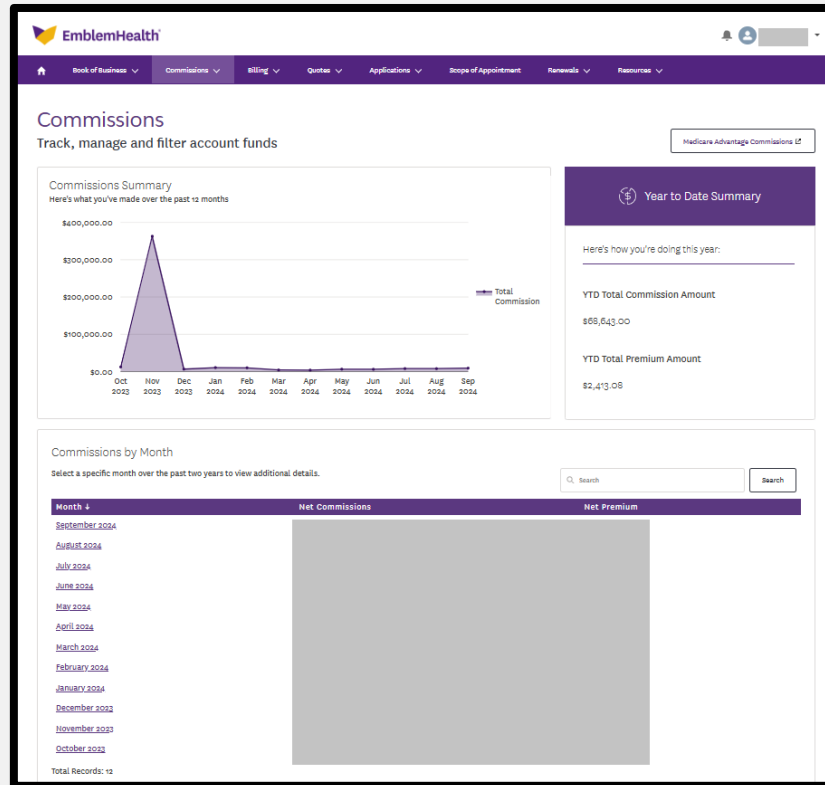
30+ Items • Sorted by Case • Filtered by All cases • Case record Type, is Vlocity • Updated a few seconds ago

Search this list...

Case	Trans...	Trans...	Client Id	Client	St...	Category	Sub-C...	Member Id	Member Name	Date/Time Ope...	Date/Time Clos...	Submi...
1	18817315	Transaction	PCP Change		Essential Plan	Closed	Membership	Change PCP		12/29/2022, 4:03 PM	12/29/2022, 4:03 PM	
2	18817438	Transaction	PCP Change		Essential Plan	Closed	Membership	Change PCP		12/29/2022, 4:06 PM	12/29/2022, 4:06 PM	
3	18907236	Transaction	PCP Change		Essential Plan	Closed	Membership	Change PCP		1/3/2023, 8:58 PM	1/3/2023, 8:58 PM	
4	18929596	Transaction	PCP Change		Essential Plan	Closed	Membership	Change PCP		1/4/2023, 11:02 PM	1/4/2023, 11:03 PM	
5	190558905	Transaction	PCP Change		Essential Plan	Closed	Membership	Change PCP		1/9/2023, 2:28 PM	1/9/2023, 2:28 PM	
6	19140341	Transaction	PCP Change		Essential Plan	Closed	Membership	Change PCP		1/11/2023, 5:12 PM	1/11/2023, 5:12 PM	
7	19412145	Transaction	PCP Change		Essential Plan	Closed	Membership	Change PCP		1/23/2023, 6:48 PM	1/23/2023, 6:48 PM	
8	19412309	Transaction	PCP Change		Essential Plan	Closed	Membership	Change PCP		1/23/2023, 7:15 PM	1/23/2023, 7:15 PM	
9	19586289	Transaction	PCP Change		Essential Plan	Closed	Membership	Change PCP		1/30/2023, 4:03 PM	1/30/2023, 4:03 PM	
10	19686468	Transaction	PCP Change		Essential Plan	Closed	Membership	Change PCP		2/2/2023, 12:28 PM	2/2/2023, 12:28 PM	
11	19728545	Transaction	PCP Change		Essential Plan	Closed	Membership	Change PCP		2/3/2023, 3:37 PM	2/3/2023, 3:37 PM	
12	19728547	Transaction	PCP Change		Essential Plan	Closed	Membership	Change PCP		2/4/2023, 4:50 PM	2/4/2023, 4:50 PM	
13	19902706	Transaction	PCP Change		Essential Plan	Closed	Membership	Change PCP		2/10/2023, 7:07 PM	2/10/2023, 7:07 PM	
14	19907666	Transaction	PCP Change		Essential Plan	Closed	Membership	Change PCP		2/11/2023, 6:43 PM	2/11/2023, 6:43 PM	
15	19962882	Transaction	PCP Change		Essential Plan	Closed	Membership	Change PCP		2/14/2023, 2:27 PM	2/14/2023, 2:27 PM	

View and track transactions at client/
member level

COMMISSIONS



Track and manage commissions

- Summary and detail level
- YTD and by month
- Click in for details

COMMISSIONS





[Home](#) [Book of Business](#) [Commissions](#) [Billing](#) [Quotes](#) [Applications](#) [Scope of Appointment](#) [Renewals](#) [Resources](#)

Commissions > September 2024

Commissions Summary for September 2024

Total Commission
\$9,395.00

Total Premium
\$0.00

Commissions Statements for September 2024

Export to Excel

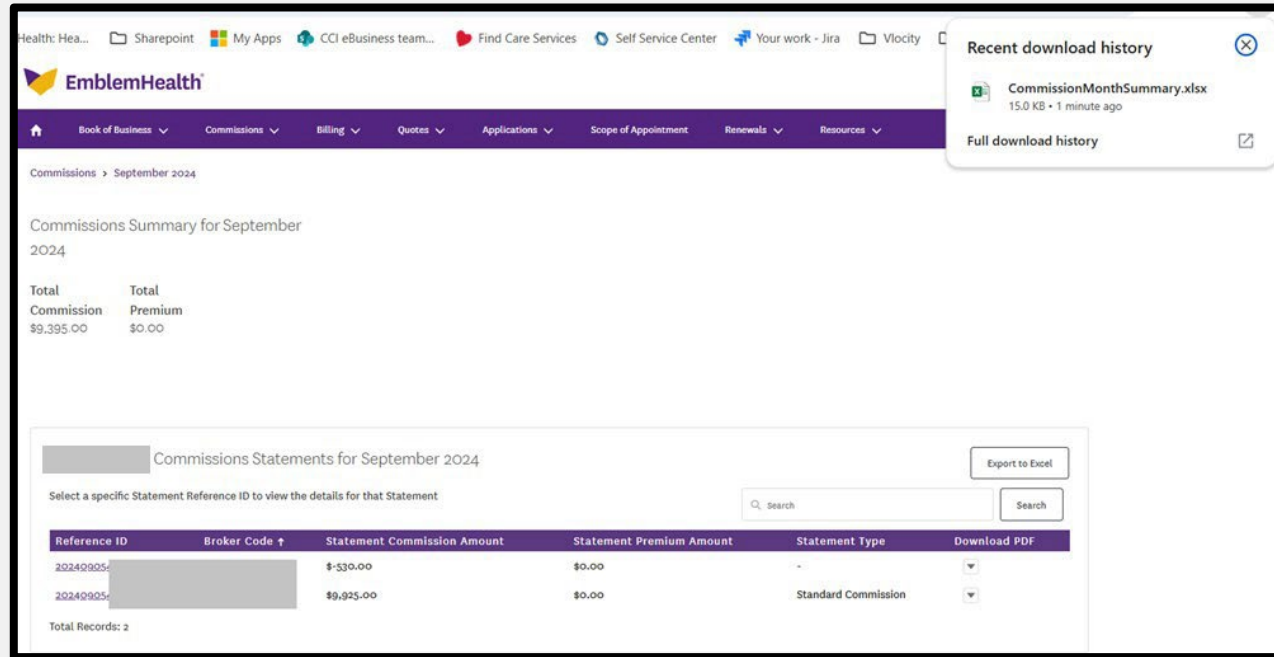
Select a specific Statement Reference ID to view the details for that Statement

Reference ID	Broker Code ↑	Statement Commission Amount	Statement Premium Amount	Statement Type	Download PDF
20240905401		\$-530.00	\$0.00		
20240905402		\$9,925.00	\$0.00	Standard Commission	

Total Records: 2

Commissions detail with link to PDF statements

COMMISSIONS - EXPORTS



Health: Hea... | Sharepoint | My Apps | CCI eBusiness team... | Find Care Services | Self Service Center | Your work - Jira | Vlocity

EmblemHealth

Commissions > September 2024

Commissions Summary for September 2024

Total Commission	Total Premium
\$9,395.00	\$0.00

Commissions Statements for September 2024

Select a specific Statement Reference ID to view the details for that Statement

Search

Reference ID	Broker Code	Statement Commission Amount	Statement Premium Amount	Statement Type	Download PDF
20240905		\$-530.00	\$0.00	-	
20240905		\$9,925.00	\$0.00	Standard Commission	

Total Records: 2

Export to Excel

Recent download history

CommissionMonthSummary.xlsx
15.0 KB • 1 minute ago

Full download history

Export commissions information to excel

BILLING

The screenshot displays the EmblemHealth Billing interface. At the top, there is a navigation bar with the EmblemHealth logo and a user profile icon. Below the navigation bar, there is a dropdown menu with options: Book of Business, Commissions, Billing (selected), Quotes, Applications, Scope of Appointment, Renewals, and Resources. The main content area shows a filter for "Paid in Full Individual & Family Billing" and a search bar. Below the search bar is a table with the following columns: Client ID, Client Name, Invoice Number, Total Amount Due, and Due Date. The table contains 10 rows of data, all showing a total amount due of \$0.00. The Due Date for all records is 10/1/2020. At the bottom left, it says "Total Records: 369".

Client ID	Client Name	Invoice Number	Total Amount Due	Due Date ↑
		000000441906183	\$0.00	10/1/2020
		000000441906200	\$0.00	10/1/2020
		000000441907776	\$0.00	10/1/2020
		000000441907041	\$0.00	10/1/2020
		000000441909070	\$0.00	10/1/2020
		000000441908674	\$0.00	10/1/2020
		000000441908151	\$0.00	10/1/2020
		000000441908178	\$0.00	10/1/2020
		000000441908272	\$0.00	10/1/2020
		000000441908779	\$0.00	10/1/2020

Total Records: 369

View, search billing information at client level including invoice number, total amount due and due date by status:

Paid in Full Individual & Family Billing

Late without Payment Individual & Family Billing

Late partial Payment Individual & Family Billing

Partial Payment Individual & Family Billing

Paid in Full Individual & Family Billing

Unpaid Individual & Family Billing

Refund Individual & Family Billing

BOOK OF BUSINESS - TRANSACTION LOGS




Book of Business
Commissions
Billing
Quotes
Applications
Scope of Appointment
Renewals
Secure Messaging
Notifications

Most transactions will be visible in the portal two business days following the transaction.


Cases
Transaction

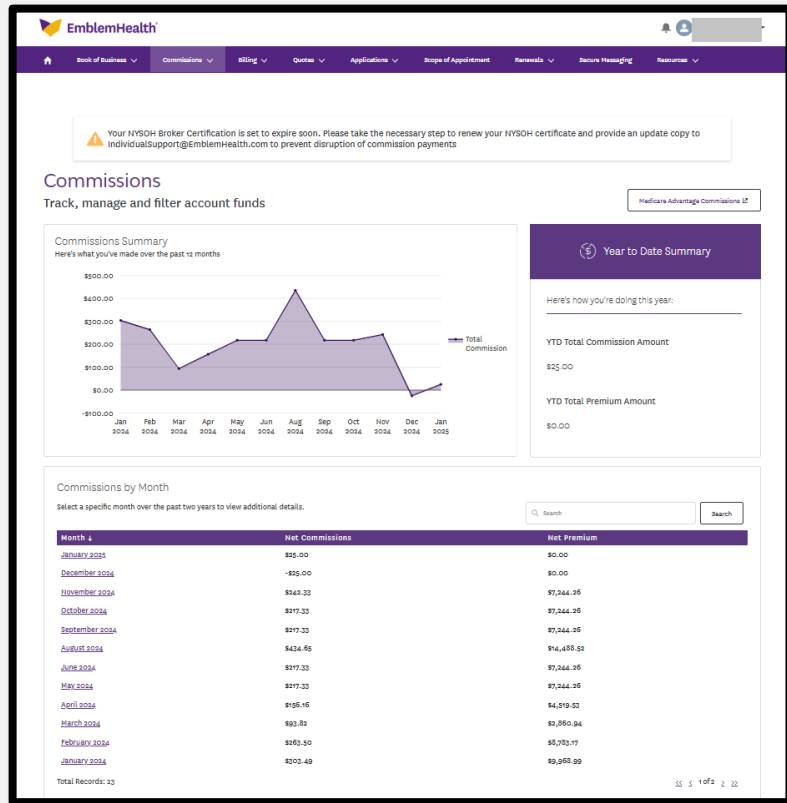
37 Items • Sorted by Date/Time Opened • Filtered by All cases - Case Record Type, is Vlocity - Updated a few seconds ago

Search this list...

Case	Trans...	Transaction Descri...	Client Id	Client	St...	Category	Sub-Category	Member Id	Member Na...	Date/Tim...	Date/Time ...	Subi
1	35714546	Transacti... Dependent Termination			Closed	Membership	Add or Terminate Me...			1/9/2025, 11:02 ...	1/9/2025, 11:02 ...	
2	35714480	Transacti... Dependent Termination			Closed	Membership	Add or Terminate Me...			1/9/2025, 11:01 ...	1/9/2025, 11:01 ...	
3	31687313	Transacti... Billing - Make a Payment			Closed	Billing and Pre...	Payment Options			7/7/2024, 9:19 AM	7/7/2024, 9:19 ...	
4	309438...	Transacti... Billing - Make a Payment			Closed	Billing and Pre...	Payment Options			5/31/2024, 11:24 ...	5/31/2024, 11:24...	
5	29657298	Transacti... Billing - Make a Payment			Closed	Billing and Pre...	Payment Options			4/1/2024, 10:28...	4/1/2024, 10:2...	
6	28965438	Transacti... Billing - Make a Payment			Closed	Billing and Pre...	Payment Options			3/1/2024, 9:36 AM	3/1/2024, 9:36 ...	
7	28879724	Transacti... Group's primary conta...			Closed	Membership	Demographic Change			2/27/2024, 11:43...	2/28/2024, 7:31...	
8	28855449	Transacti... Subscriber Termination			Closed	Membership	Add or Terminate Me...			2/26/2024, 2:26...	2/26/2024, 2:2...	
9	28847933	Transacti... Add Subscriber			Closed	Membership	Add or Terminate Me...			2/26/2024, 12:10...	2/26/2024, 12:...	
10	28847573	Transacti... Group's primary conta...			Closed	Membership	Demographic Change			2/26/2024, 12:10...	2/27/2024, 11:2...	
11	28847514	Transacti... Group's primary conta...			Closed	Membership	Demographic Change			2/26/2024, 12:10...	2/27/2024, 11:04...	
12	28847481	Transacti... Group's primary conta...			Closed	Membership	Demographic Change			2/26/2024, 12:10...	2/27/2024, 11:02...	
13	28287618	Transacti... Billing - Make a Payment			Closed	Billing and Pre...	Payment Options			1/31/2024, 9:52 ...	1/31/2024, 9:52 ...	

View and track transactions at client/ member level

COMMISSIONS



Track and manage commissions

- Summary and detail level
- YTD and by month
- Click in for details

COMMISSION STATEMENTS

Commissions detail with link to PDF statements

EmblemHealth

Commissions > November 2024

Commissions Summary for November 2024

Total Commission	Total Premium
\$242.33	\$7,244.26

Commissions Statements for November 2024

Select a specific Statement Reference ID to view the details for that Statement

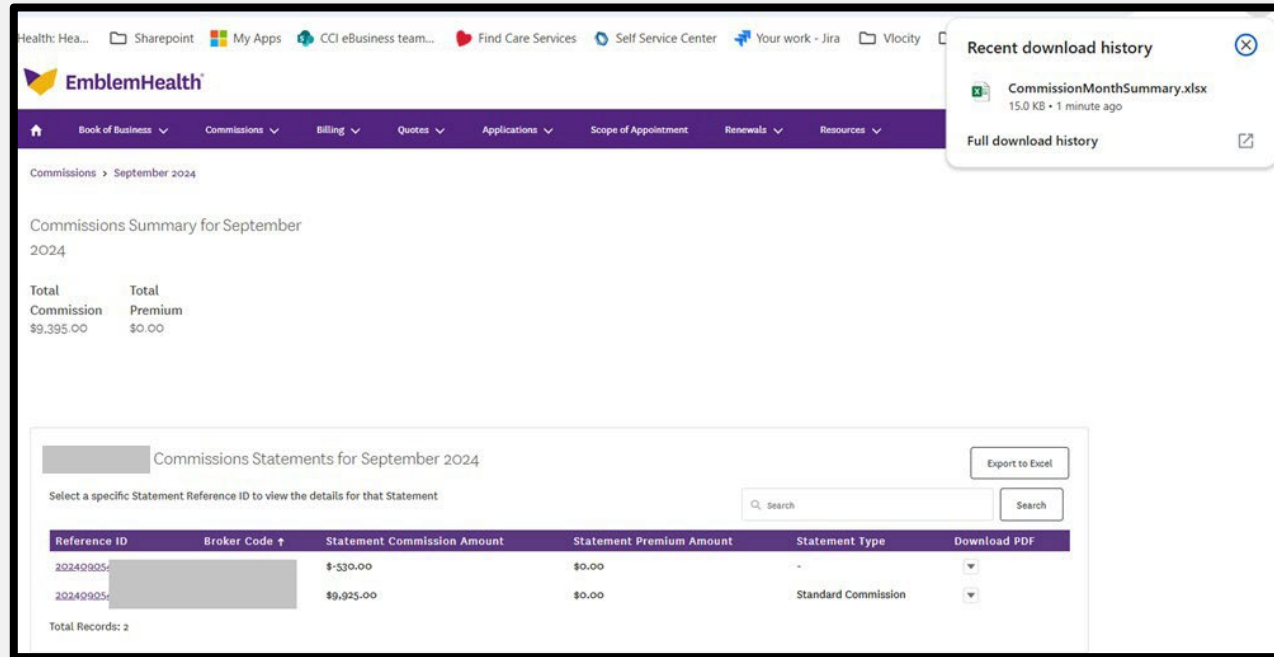
Export to Excel

Search

Reference ID	Broker Code	Statement Commission Amount	Statement Premium Amount	Statement Type	Download PDF
		\$242.33	\$7,244.26	Standard Commission	LA-1197439_0299564_1056.pdf

Total Records: 1

COMMISSIONS - EXPORTS



Health: Hea... | Sharepoint | My Apps | CCI eBusiness team... | Find Care Services | Self Service Center | Your work - Jira | Vlocity

EmblemHealth

Commissions > September 2024

Commissions Summary for September 2024

Total Commission	Total Premium
\$9,395.00	\$0.00

Commissions Statements for September 2024

Select a specific Statement Reference ID to view the details for that Statement

Search

Reference ID	Broker Code	Statement Commission Amount	Statement Premium Amount	Statement Type	Download PDF
20240905		\$-530.00	\$0.00	-	
20240905		\$9,925.00	\$0.00	Standard Commission	

Total Records: 2

Export to Excel

Recent download history

- CommissionMonthSummary.xlsx
15.0 KB • 1 minute ago

Full download history

Export commissions information to excel

QUOTES

EmblemHealth

Book of Business Commissions Billing Quotes Applications Scope of Appointment Renewals Secure Messaging Resources

In Review Small Group Quotes

Search

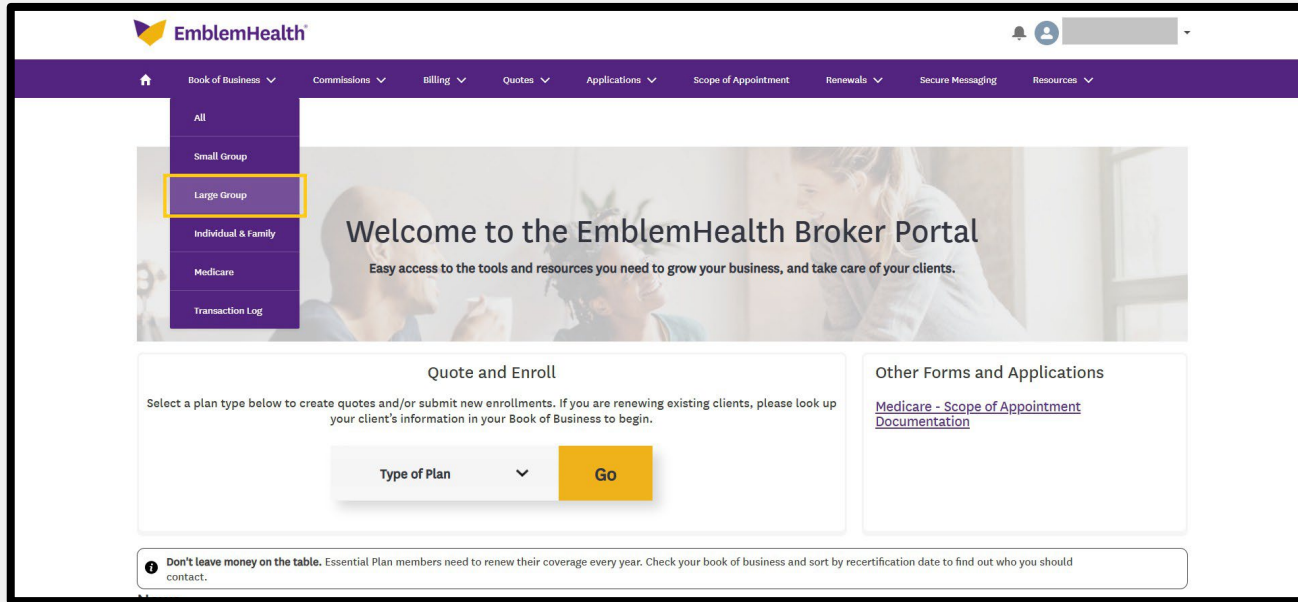
Quote Reference Id	Quote Name	Created Date	Expiration Date	Status	Closed Reason
00292742		Jan 7, 2025 9:41 AM	2025-03-07	In Review	Download Quote PDF Close Quote Enroll Now Edit Quote
00292736		Jan 7, 2025 9:28 AM	2025-03-07	In Review	
00292431		Jan 6, 2025 12:49 AM	2025-03-06	In Review	
00291361		Dec 2, 2024 5:34 AM	2025-02-02	In Review	
00289538		Nov 27, 2024 1:31 AM	2025-01-27	In Review	
00289507		Nov 26, 2024 8:59 AM	2025-01-26	In Review	
00289438		Nov 26, 2024 3:40 AM	2025-01-26	In Review	
00289437		Nov 26, 2024 3:40 AM	2025-01-26	In Review	
00289434		Nov 26, 2024 3:35 AM	2025-01-26	In Review	
00289432		Nov 26, 2024 3:29 AM	2025-01-26	In Review	
00289253		Nov 22, 2024 3:00 AM	2025-01-22	In Review	
00289224		Nov 21, 2024 9:30 AM	2025-01-21	In Review	
00289143		Nov 20, 2024 6:47 AM	2025-01-20	In Review	
00289142		Nov 20, 2024 6:45 AM	2025-01-20	In Review	
00288929		Nov 14, 2024 6:27 AM	2025-01-14	In Review	
00288928		Nov 14, 2024 6:17 AM	2025-01-14	In Review	
00288927		Nov 14, 2024 6:15 AM	2025-01-14	In Review	
00276075		Jun 24, 2024 4:46 AM	2024-08-24	In Review	
00275610		Jun 12, 2024 12:53 AM	2024-08-12	In Review	

Total Records: 19

View saved quotes

- Download Quote PDF
- Close Quote
- Enroll
- Edit Quote

BOOK OF BUSINESS – LARGE GROUP



Manage your book of business from the first tab.

Select Large Group to see Large Group clients

BOOK OF BUSINESS – LARGE GROUP ACCOUNTS

The screenshot shows the EmblemHealth Book of Business interface for Large Group Accounts. The sidebar on the left has a dropdown menu for 'Accounts' with options for 'Active Large Group Clients' (selected) and 'Terminated Large Group Clients'. The main content area displays a table of client data. Above the table, there is an 'Export to Excel' button and a search bar. The table has the following columns: Client ID, Client Name, Monthly Premium, Enrolled Subscribers, Enrolled Dependents, Original Effective Date, Group Renewal Date, and State. The data is sorted by Client ID. The total number of records is 45.

Client ID	Client Name	Monthly Premium	Enrolled Subscribers	Enrolled Dependents	Original Effective Date	Group Renewal Date	State
\$7,164.96		6	0	06/01/2018	06/01/2025	New York	
\$22,422.15		29	0	01/01/2018	01/01/2026	New York	
\$23,955.06		17	2	09/15/2018	09/15/2025	New York	
\$147,423.23		123	35	04/01/2018	04/01/2025	New York	
\$14,315.45		7	9	08/01/2019	08/01/2025	New York	
\$147,461.82		101	42	01/15/1993	01/01/2026	New York	
\$48,245.52		42	0	04/01/1998	03/01/2025	New York	
\$1,216.70		1	0	01/01/2018	01/01/2026	New York	
\$9,266.79		5	3	03/01/2018	03/01/2025	New York	
\$34,484.00		17	8	01/01/2018	01/01/2026	New York	

Total Records: 45

See Active and Terminated Accounts

Information includes:

- Client ID and Name
- Monthly premium
- Enrolled subscribers and dependents
- Original effective date
- Group renewal date
- State

Search

Export to excel

Click Client ID for detail

BOOK OF BUSINESS – LARGE GROUP CLIENT DETAILS

EmblemHealth

Book of Business > Client Details > Group

Large Group Client Details

To enroll a new employee, please select the appropriate subgroup and use the "Add Subscriber" option there.

Client Details | Billing

Client Address [Redacted] **Tax Id** [Redacted] [Client Actions](#)

Monthly Premium \$10,954.35 **Enrolled Subscribers** 3

Enrolled Dependents 5 **New Hire waiting Period**

Original Effective Date 05/01/2021 **Coverage Start Date** 01/01/2021

Coverage End Date **Termination Date**

Status ACTIVE **SHOP certified** N

SIC Code

> COBRA, HRA/HSA, Young Adult Rider and Involuntary Details

> Group Primary Contact Information

> Agent Summary

> Group Plan Summary

> Group Documents

▼ List of Sub-Groups

Id	Name	Tax Id	Primary Address	Coverage Start Date	Coverage End Date	Status	Renewal Date
1000	[Redacted]	[Redacted]	[Redacted]	01/01/2021		Active	01/01/2026

Total Records: 1

[Add A Question](#)

Client details include information such as address, point of contact, agency summary, group plan summary and group documents

To make any Subscriber level changes, click on a Sub-group in the Sub-group panel

BOOK OF BUSINESS – LG SUB-GROUP CLIENT SUMMARY

EmblemHealth

Book of Business > Group > Sub-group

Sub-group Client Summary

Client Details Billing

Tax ID
Primary Phone & Extension
Coverage Start Date
01/01/2021
Total Number of Subscribers
3
Termination Date

Primary Contact Email Address
Status
Active
Coverage End Date
Total Number of Dependents
5
Primary Address

Client Actions

Sub-group Client Details

Subscribers Members Medical Plans Dental Plans Documents

Export Employee Roster

Search

Member ID	Name	Date Of Birth	SSN	Birth Sex	Relationship To Subscriber	Coverage Start Date	Coverage End Date	Termination Date	Original Effective Date	Status
		10/11/1981		Male	Subscriber	01/01/2021			07/07/2022	Active
		03/03/1974		Female	Subscriber	01/01/2021	07/04/2021	07/04/2021	04/01/2022	Inactive
		01/11/1958		Female	Subscriber	02/22/2004	05/27/2004	05/27/2004	02/22/2004	Inactive
		04/14/1972		Male	Subscriber	01/01/2021			07/07/2022	Active
		08/02/1918		Male	Subscriber	01/01/2021	03/31/2004	03/31/2004	03/04/2003	Inactive
		01/01/1944		Male	Subscriber	01/01/2021			12/12/2022	Active
		12/18/1955		Male	Subscriber	01/01/2021	04/04/2022	04/04/2022	05/01/2022	Inactive
		10/01/1964		Female	Subscriber	01/01/2018	11/26/2019	11/26/2019	10/01/2022	Inactive
		11/22/1982		Female	Subscriber	01/01/2018	06/12/2019	06/12/2019	06/12/2019	Inactive

Total Records: 9

Add A Summary

Sub-group client details include information such as Subscribers, Members, Medical Plans, Dental Plans and Documents

Search
Export to excel
Click Member ID for detail

To make Subscriber level changes: in the Sub-group panel, click on the Member ID of the Subscriber you are making changes for.

BOOK OF BUSINESS – LARGE GROUP SUBSCRIBER DETAILS

The screenshot displays the EmblemHealth web application interface for the 'Large Group Book of Business'. The top navigation bar includes links for Book of Business, Communications, Billing, Quotes, Applications, Scope of Appointment, Renewals, Secure Messaging, and Resources. The breadcrumb trail indicates the path: Large Group Book of Business > Group > Sub-group > Subscriber.

The main content area is titled 'Member Information' and displays a form with the following fields:

Field	Value
Name	[Redacted]
Status Indicator	Active
ID	K10009332
Address	[Redacted]
Email	[Redacted]
Phone & Extension	[Redacted]
Date of Birth	12/21/1961
Marital Status	Married
SSN	[Redacted]
Referral Required	Yes
Birth Sex	Male
Gender Identity	-
Pronouns	-
Sexual Orientation/Identity	-
Race	Not Assigned
Ethnicity	Not Assigned
Language	English
Accessible Format	-

Below the form, a note states: 'Updates to Birth Sex, Gender Identity, Sexual orientation, Pronouns, Race, Ethnicity, Language or Accessible format must be made by the Member through the member portal.'

A dropdown menu titled 'Subscriber Actions' is highlighted with a yellow box. The menu options are:

- Add Dependent
- Change Subscriber Name
- Change Marital Status
- Change Subscriber Address
- Change PCP
- Change Plan
- Terminate Subscriber
- Terminate Dental Coverage
- Terminate Medical Coverage
- Terminate HSA
- Add Additional Insurance

At the bottom of the page, there are several expandable sections:

- > Plan
- > Stop Age Riders
- > Medical Member ID Card
- > Dental Member ID Card
- > Additional Insurance
- > Dependents

On the Subscriber Details page, you will have a Subscriber Actions dropdown menu where you can select the transaction type

BOOK OF BUSINESS – LARGE GROUP BILLING

EmblemHealth

Book of Business Commissions **Billing** Quotes Applications Scope of Appointment Renewals Secure Messaging Resources

Large Group Client Details

To enroll a new employee, please select the appropriate subgroup and use the "Add Subscriber" option there.

Client Details **Billing**

Billing Account	Billing Level
	Group
Invoice Number	Invoice Date
	12/10/2024
Billed Amount	Adjustment Amount
\$10,954.35	
Total Amount Due	Past Amount Due
\$20,987.63	\$10,013.28
Days Past Due	Invoice Due Date
8	01/01/2025
Last Payment Amount	Payment Date
\$10,013.28	12/16/2024
Billing Frequency	Status
Monthly	Unpaid

Accessible under Book of Business or Billing navigation

Client billing information, including:

- Billed amount
- Total amount due
- Amount and days past due
- Billing frequency
- Payment date

Cont'd on next page

BOOK OF BUSINESS – LARGE GROUP BILLING

Invoice History

Export to Excel

Invoice Number ↑	Invoice Date	Billed Amount	Total Amount Due	Invoice Due Date	Invoice Status
	01/10/2023	\$7,914.78	\$7,914.78	03/01/2023	Paid in Full
	02/10/2023	\$7,914.78	\$7,914.78	03/01/2023	Paid in Full
	03/10/2023	\$7,914.78	\$7,914.78	04/01/2023	Paid in Full
	04/10/2023	\$7,914.78	\$7,914.78	05/01/2023	Paid in Full
	05/10/2023	\$7,914.78	\$7,914.78	06/01/2023	Paid in Full
	06/10/2023	\$7,914.78	\$7,914.78	07/01/2023	Paid in Full
	07/10/2023	\$7,914.78	\$7,914.78	08/01/2023	Paid in Full
	08/10/2023	\$7,914.78	\$7,914.78	09/01/2023	Paid in Full
	09/10/2023	\$7,914.78	\$7,914.78	10/01/2023	Paid in Full
	10/10/2023	\$7,914.78	\$7,914.78	11/01/2023	Paid in Full

Total Records: 24 11 1 of 3 22

Payment History

Export to Excel

Payment Number ↑	Payment Amount	Payment Date	Method Of Payment
	\$7,914.78	02/01/2023	Not applicable
	\$7,914.78	03/02/2023	Not applicable
	\$7,914.78	03/30/2023	Not applicable
	\$7,914.78	05/01/2023	Not applicable
	\$7,914.78	06/01/2023	Not applicable
	\$7,914.78	06/30/2023	Not applicable
	\$7,914.78	08/01/2023	Not applicable
	\$7,914.78	09/01/2023	Not applicable
	\$7,914.78	09/28/2023	Not applicable
	\$7,914.78	11/01/2023	Not applicable

Total Records: 24 11 1 of 3 22

Ask A Question

- Invoice and Payment History

View and download invoices
Export to excel
Search

BOOK OF BUSINESS - TRANSACTION LOGS




Book of Business
Commissions
Billing
Quotes
Applications
Scope of Appointment
Renewals
Secure Messaging
Notifications

Most transactions will be visible in the portal two business days following the transaction.


Cases
Transaction

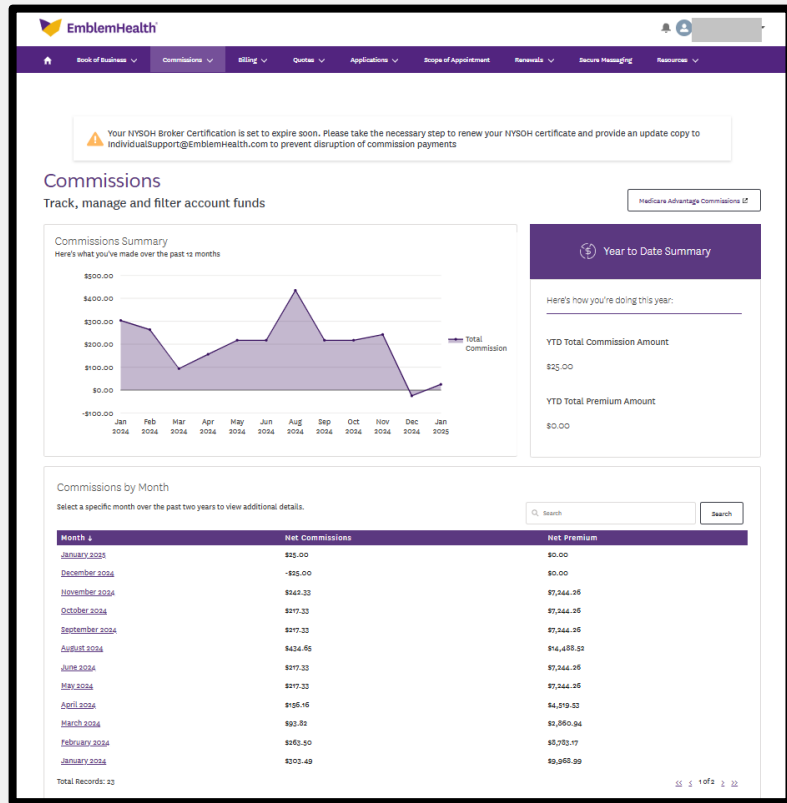
37 Items • Sorted by Date/Time Opened • Filtered by All cases - Case Record Type, is Vlocity - Updated a few seconds ago




Case	Trans...	Transaction Descri...	Client Id	Client	St...	Category	Sub-Category	Member Id	Member Na...	Date/Tim...	Date/Time ...	Subi
1	35714546	Transacti... Dependent Termination			Closed	Membership	Add or Terminate Me...			1/9/2025, 11:02 ...	1/9/2025, 11:02 ...	
2	35714480	Transacti... Dependent Termination			Closed	Membership	Add or Terminate Me...			1/9/2025, 11:01 ...	1/9/2025, 11:01 ...	
3	31687313	Transacti... Billing - Make a Payment			Closed	Billing and Pre...	Payment Options			7/7/2024, 9:19 AM	7/7/2024, 9:19 ...	
4	309438...	Transacti... Billing - Make a Payment			Closed	Billing and Pre...	Payment Options			5/31/2024, 11:24 ...	5/31/2024, 11:24...	
5	29657298	Transacti... Billing - Make a Payment			Closed	Billing and Pre...	Payment Options			4/1/2024, 10:28...	4/1/2024, 10:2...	
6	28965438	Transacti... Billing - Make a Payment			Closed	Billing and Pre...	Payment Options			3/1/2024, 9:36 AM	3/1/2024, 9:36 ...	
7	28879724	Transacti... Group's primary conta...			Closed	Membership	Demographic Change			2/27/2024, 11:43...	2/28/2024, 7:31...	
8	28855449	Transacti... Subscriber Termination			Closed	Membership	Add or Terminate Me...			2/26/2024, 2:26...	2/26/2024, 2:2...	
9	28847933	Transacti... Add Subscriber			Closed	Membership	Add or Terminate Me...			2/26/2024, 12:10...	2/26/2024, 12:...	
10	28847573	Transacti... Group's primary conta...			Closed	Membership	Demographic Change			2/26/2024, 12:10...	2/27/2024, 11:2...	
11	28847514	Transacti... Group's primary conta...			Closed	Membership	Demographic Change			2/26/2024, 12:10...	2/27/2024, 11:04...	
12	28847481	Transacti... Group's primary conta...			Closed	Membership	Demographic Change			2/26/2024, 12:10...	2/27/2024, 11:02...	
13	28287618	Transacti... Billing - Make a Payment			Closed	Billing and Pre...	Payment Options			1/31/2024, 9:52 ...	1/31/2024, 9:52 ...	

View and track transactions at client/ member level

COMMISSIONS



Track and manage commissions

- Summary and detail level
- YTD and by month
- Click in for details

COMMISSION STATEMENTS

Commissions detail with link to PDF statements



[Book of Business](#) [Commissions](#) [Billing](#) [Quotas](#) [Applications](#) [Scope of Appointment](#) [Renewals](#) [Secure Messaging](#) [Resources](#) 

Commissions > November 2024



- For NYSOH enrollment, please allow 7-10 business days after a new member enrollment request is submitted before the member becomes visible as part of your book of business.
- Commission payment on recent updates made to your book of business may occur during next month's commission cycle.
- Due to timing, there may be a delay between the members seen as part of your book of business on the broker portal and who appears on your current month's commission statement.

Commissions Summary for November 2024

Total Commission	Total Premium
\$242.33	\$7,244.26

Commissions Statements for November 2024

Export to Excel

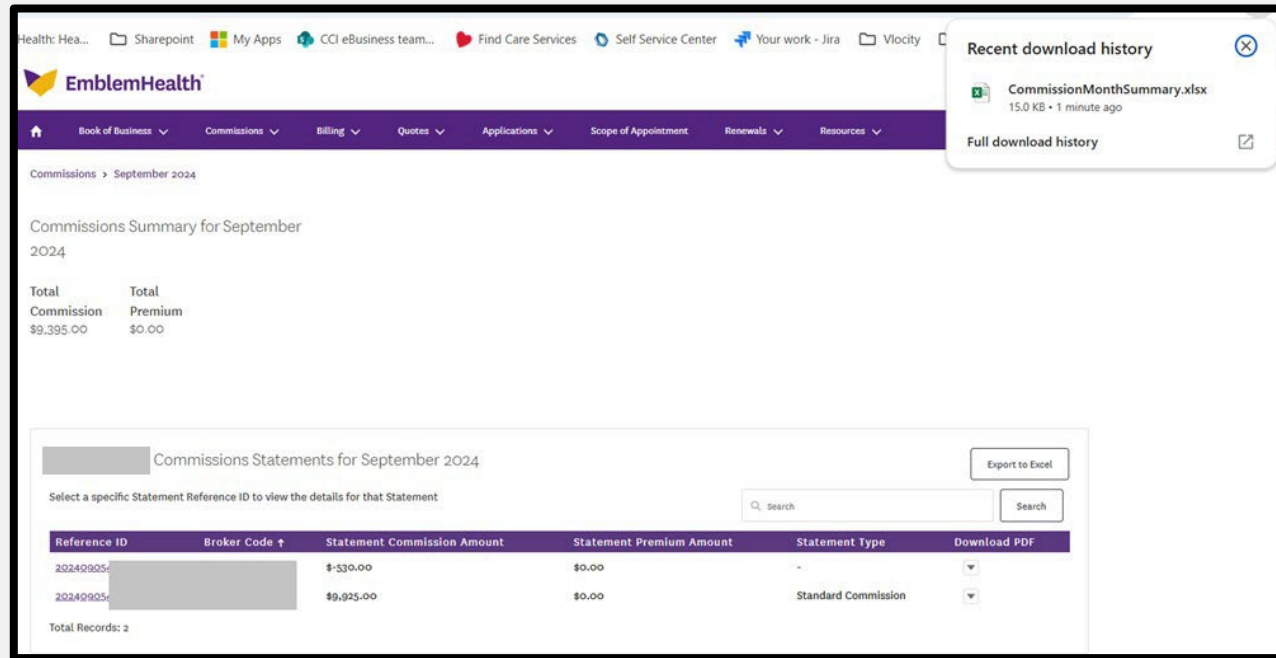
Select a specific Statement Reference ID to view the details for that Statement

Search

Reference ID	Broker Code ↑	Statement Commission Amount	Statement Premium Amount	Statement Type	Download PDF
		\$242.33	\$7,244.26	Standard Commission	
LA-1197439_0299564_1056.pdf					

Total Records: 1

COMMISSIONS - EXPORTS



Health: Hea... | Sharepoint | My Apps | CCI eBusiness team... | Find Care Services | Self Service Center | Your work - Jira | Vlocity

EmblemHealth

Commissions > September 2024

Commissions Summary for September 2024

Total Commission	Total Premium
\$9,395.00	\$0.00

Commissions Statements for September 2024

Select a specific Statement Reference ID to view the details for that Statement

Search

Reference ID	Broker Code	Statement Commission Amount	Statement Premium Amount	Statement Type	Download PDF
20240905		\$-530.00	\$0.00	-	
20240905		\$9,925.00	\$0.00	Standard Commission	

Total Records: 2

Export to Excel

Recent download history

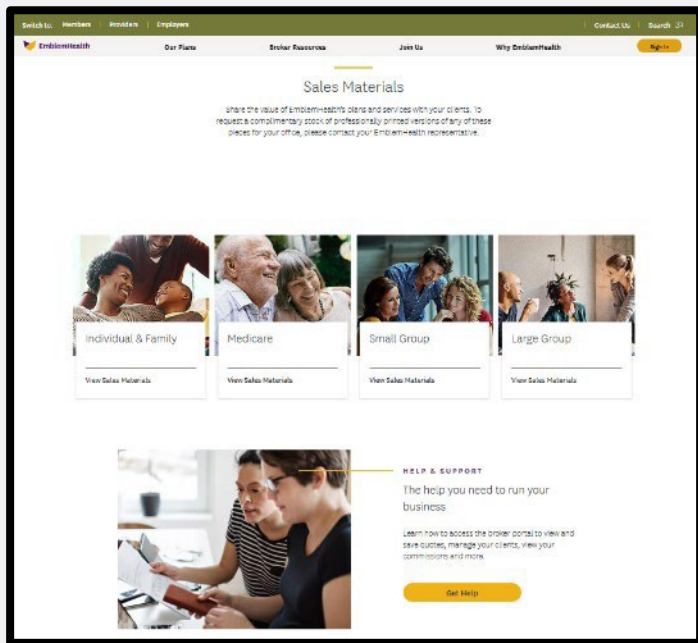
- CommissionMonthSummary.xlsx
15.0 KB • 1 minute ago

Full download history

Export commissions information to excel

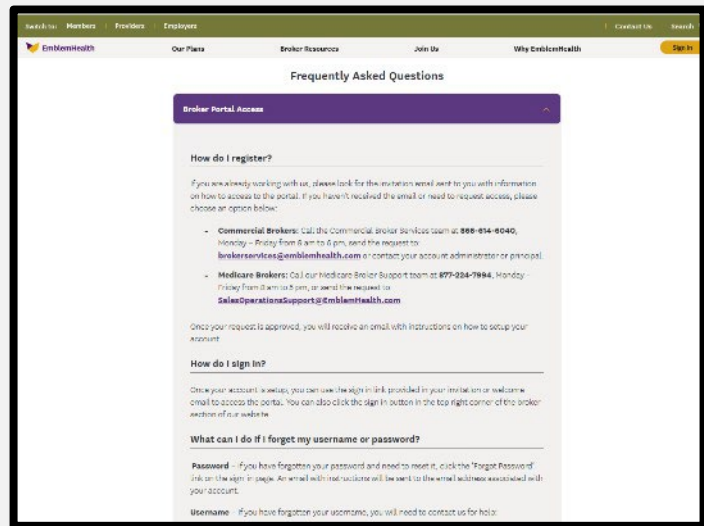
RESOURCES

- Broker Portal: Resources for Brokers | EmblemHealth



Access resources, help online

- Including FAQs, portal guides



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
Home	X	X	X	X	X	X	X	X	X
Create Quote	X	X	X	X				X	X
Book of Business	X	X	X	X	X	X	X	X	
List of Accounts	X	X	X	X	X	X	X	X	
Account Detail	X	X	X	X	X	X	X	X	
Add Member	X	X	X	X	X		X	X	
Billing	X	X	X	X	X	X	X		
Billing History	X	X	X	X	X	X	X		
Sub-Group/Plans	X	X	X	X	X	X	X	X	
Sub- Group/Plan Details	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
Employees	X	X	X	X	X	X	X	X	
Employee Dependent Detail	X	X	X	X	X	X	X	X	
Edit Member, Eligibility, QLE, PCP	X	X	X	X			X	X	
Documents (group- specific)	X	X	X	X	X	X	X	X	
Commissions	X	X				X			
List of Commissions	X	X				X			
Commissions Detail	X	X				X			
Agency Summary	X	X				X			
Client Summary	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
Quotes	X	X	X	X				X	X
List of Quotes	X	X	X	X				X	X
Quote Details	X	X	X	X				X	X
Quote & Enroll	X	X	X	X				X	X
Applications	X	X	X	X				X	X
Renewals	X	X	X	X		X			X
List of Groups	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
Resources	X	X	X	X	X	X	X	X	X
Help and Support	X	X	X	X	X	X	X	X	X
Profile									
My Profile	X	X	X	X	X	X	X	X	X
Edit Profile	X	X	X	X	X	X	X	X	X
Manage Users (Related tab)	X	X							



Thank you

