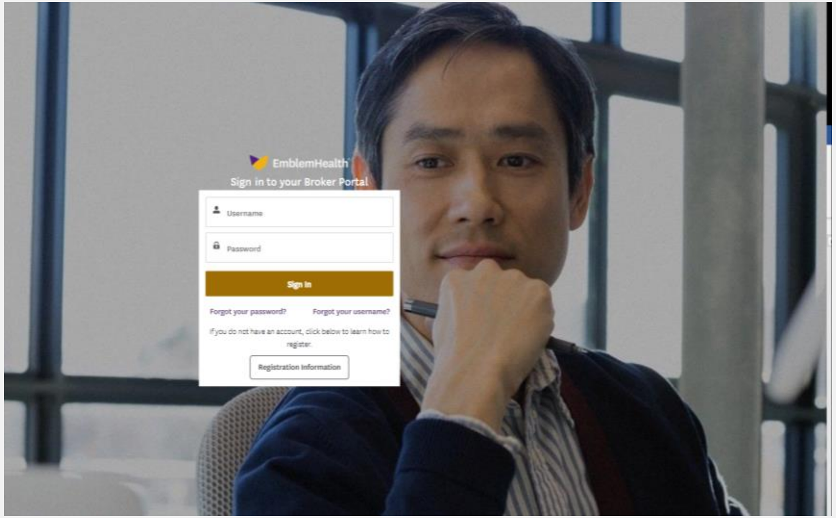
EmblemHealth

Overview of the secure broker website

September 2021

EmblemHealth®

KEY FUNCTIONALITY FOR COMMERCIAL BROKERS



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

*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.

EmblemHealth

August 27, 2021

Dear Test,

Your EmblemHealth broker portal account is now ready.

Your username is: r_begum@emblemhealth.com.wilson
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. 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.

You can use this link at any time to return to the portal:
Sign In.

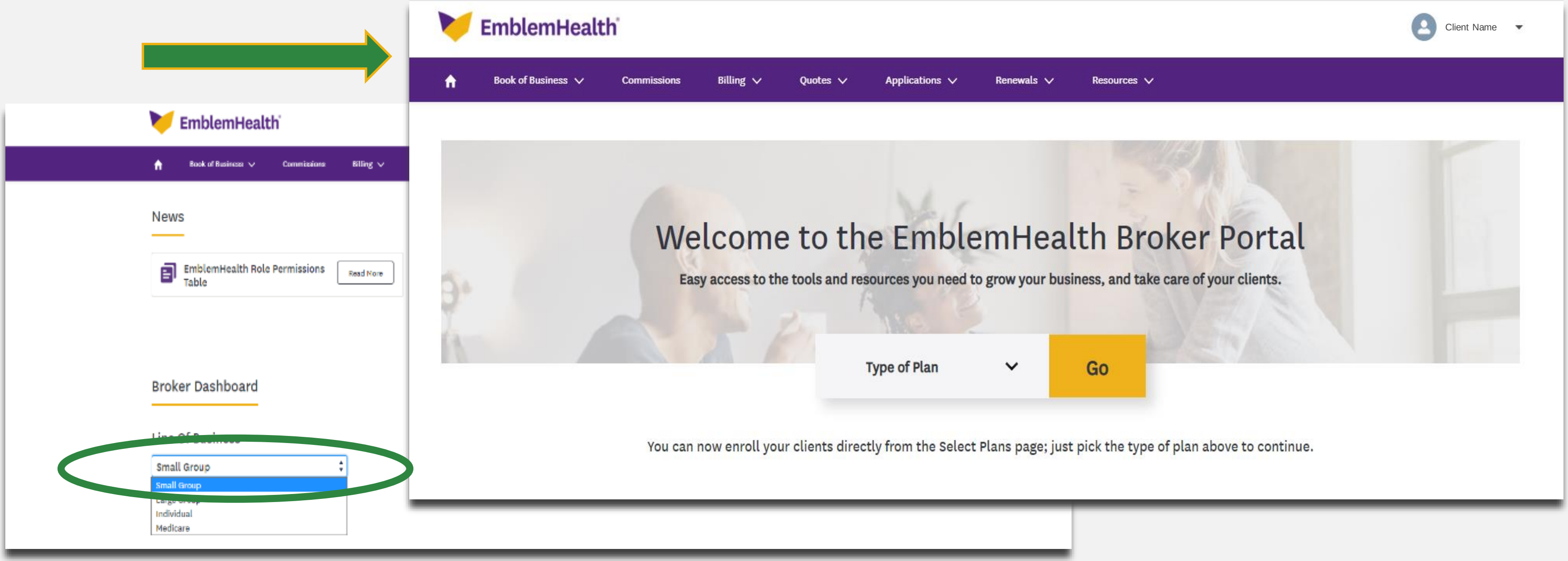
We're committed to supporting our partnership.

David Notari
Senior Vice President Of Sales and Account Management
EmblemHealth

Scott Ushkowitz
Vice President of Medicare Sales
ConnectiCare | EmblemHealth

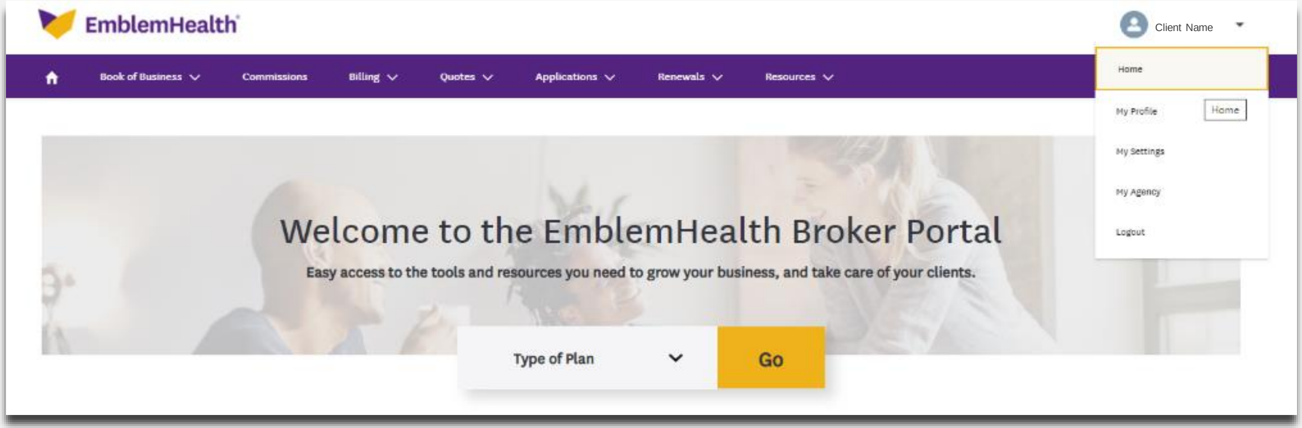
This email is valid for the next 7 days. Please make sure to complete your account setup during that time. Do not reply to this email. It is an unmonitored account.

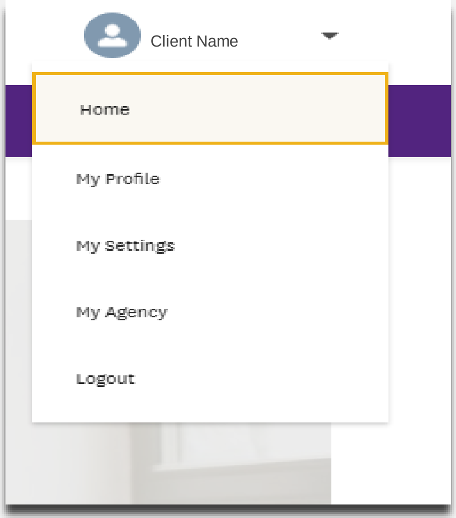
WELCOME TO YOUR DASHBOARD



- 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

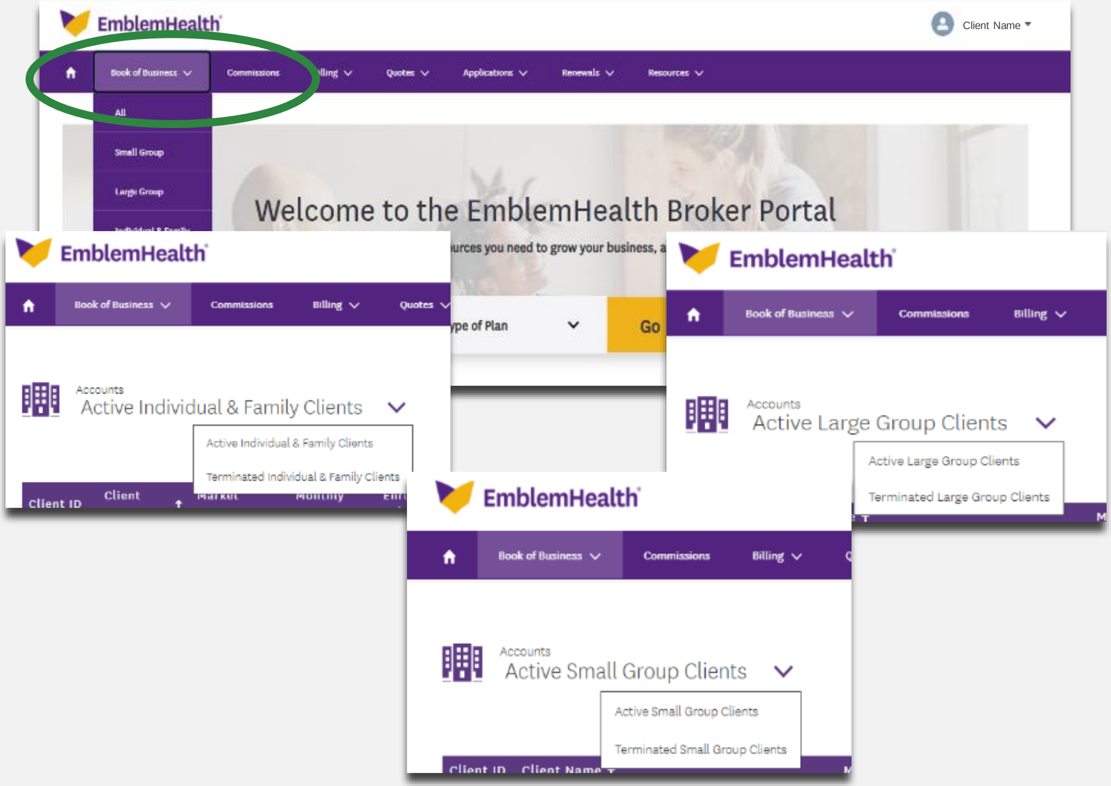




- Click your name in the top right corner to access your **profile**, personal **settings** and **agency** information.
- If you are a principal user or general agent, **My Agency** is where you set up your organization's various users, assigning them permissions and privileges on the broker website. 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.

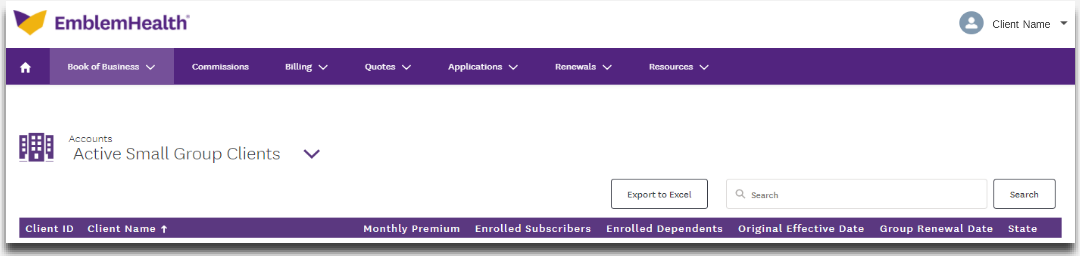
MENU HIGHLIGHTS- BOOK OF BUSINESS

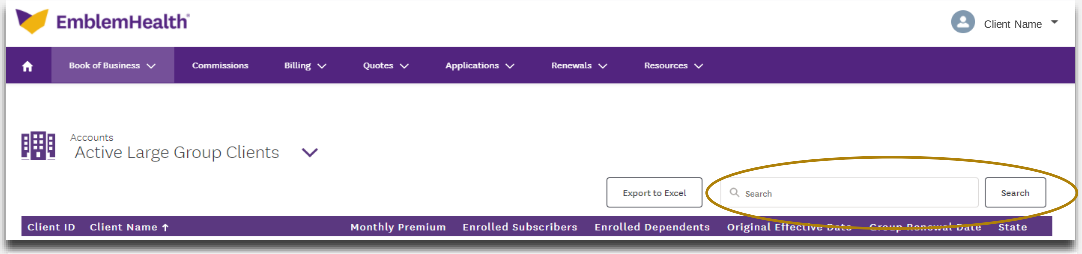
- Find details about your active and terminated clients in these segments:*
  - Small Group
  - Large Group
  - Individual and family (under 65)
  - Medicare – This choice will take you to Evolve, a secure website that you have already been using.
- You can also track all the transactions you or anyone in your organization may have made on the broker website.

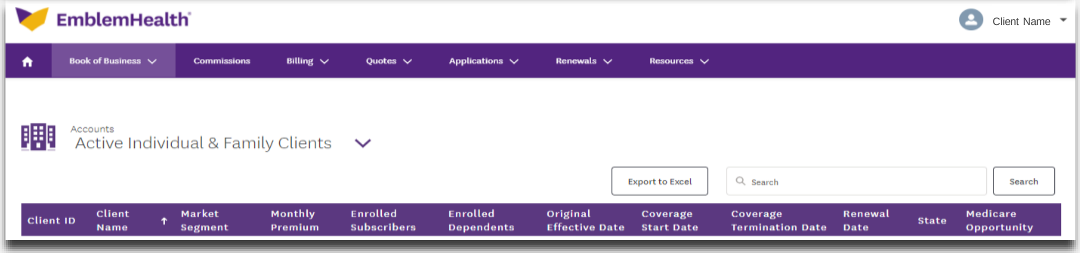


Tip: Click on arrows, like **>** or **V**, to reveal more choices.

MENU HIGHLIGHTS- BOOK OF BUSINESS





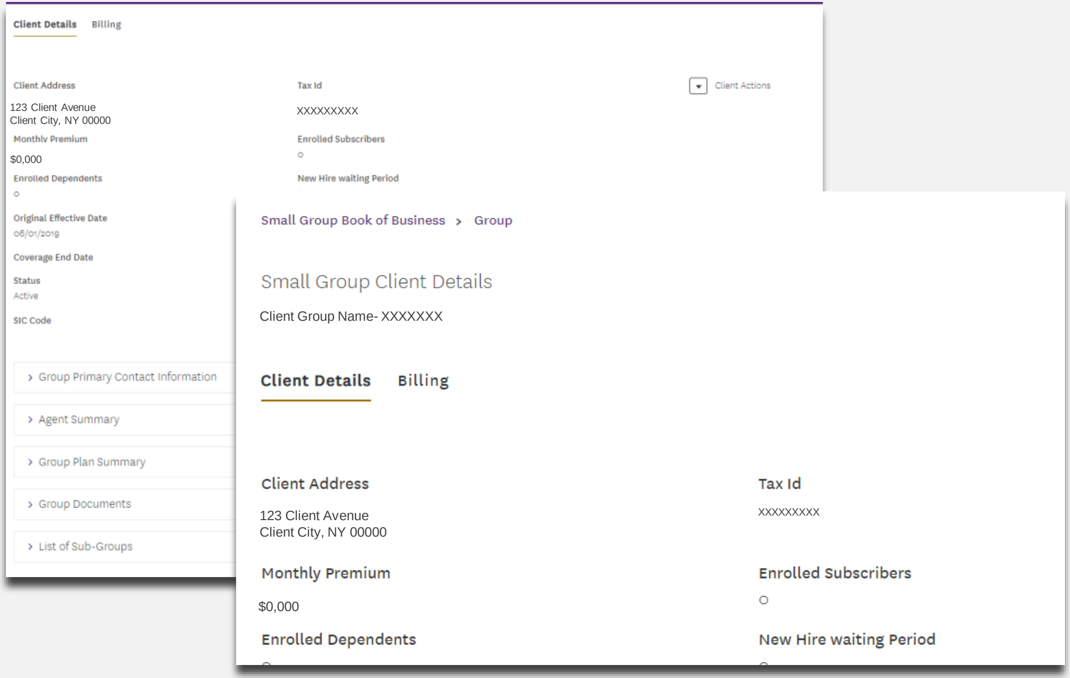


- Each header row allows you to sort in ascending or descending order.
- Select your client's **Client ID** number to access more details for a specific client, such as:
  - Effective date for groups
  - Contact information for individual clients

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

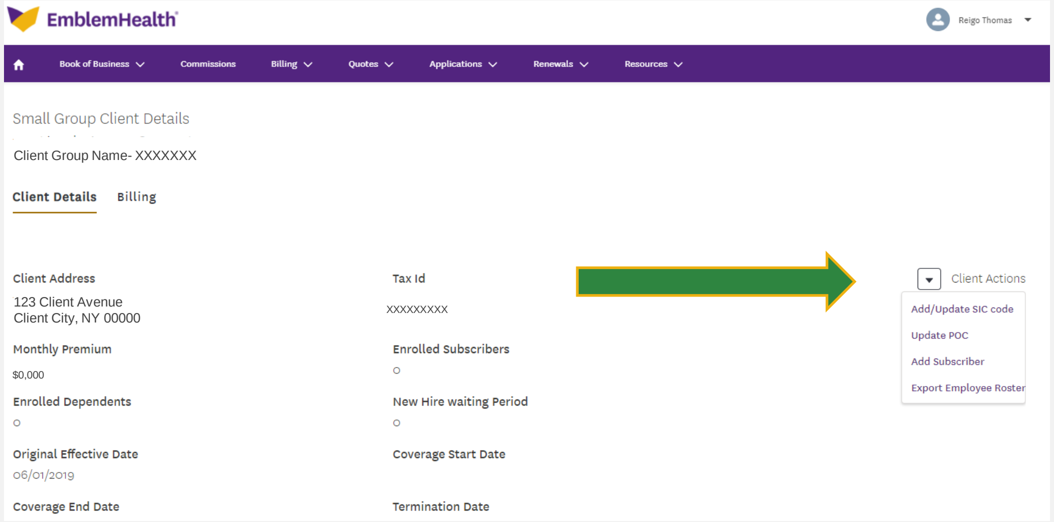
Tip: Move your cursor along the data fields in a table to access the links for more details.

MENU HIGHLIGHTS- BOOK OF BUSINESS, CLIENT DETAILS FOR GROUPS



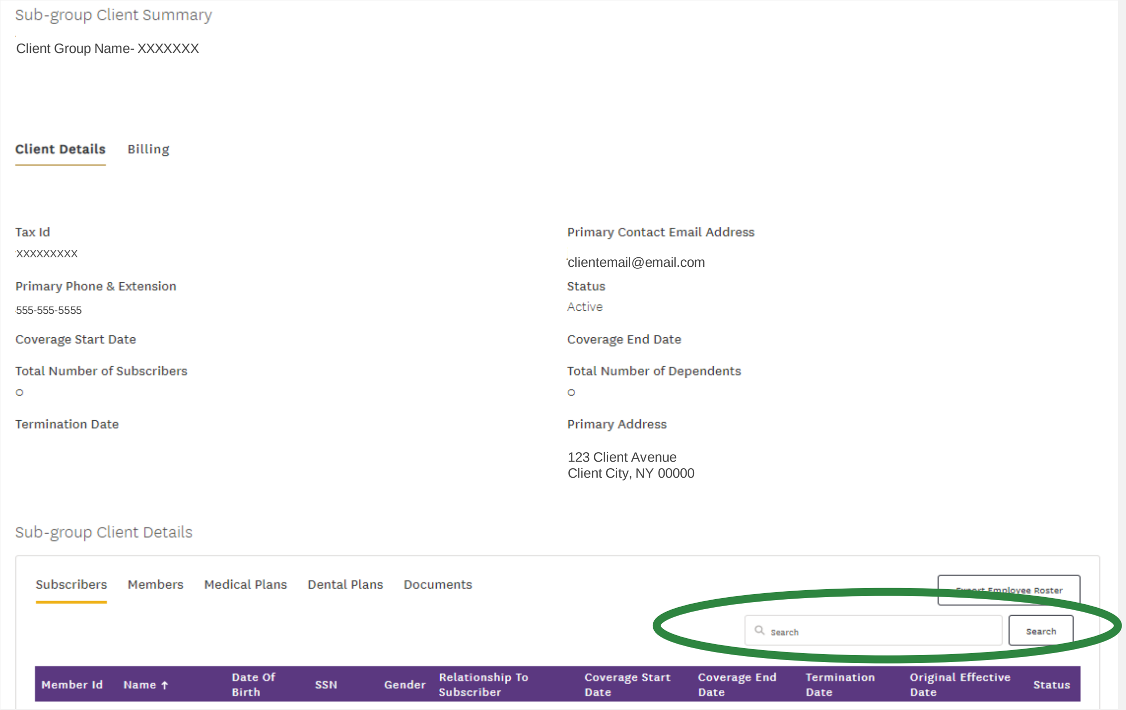
- Under **Client Details** for large groups, you can view:
  - Details, such as effective date, client roster, enrolled dependents, monthly premium and primary contact information
  - Agent summary
  - Group plan summary, including the ability to download summary of benefits coverage or summary of benefits
  - 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



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

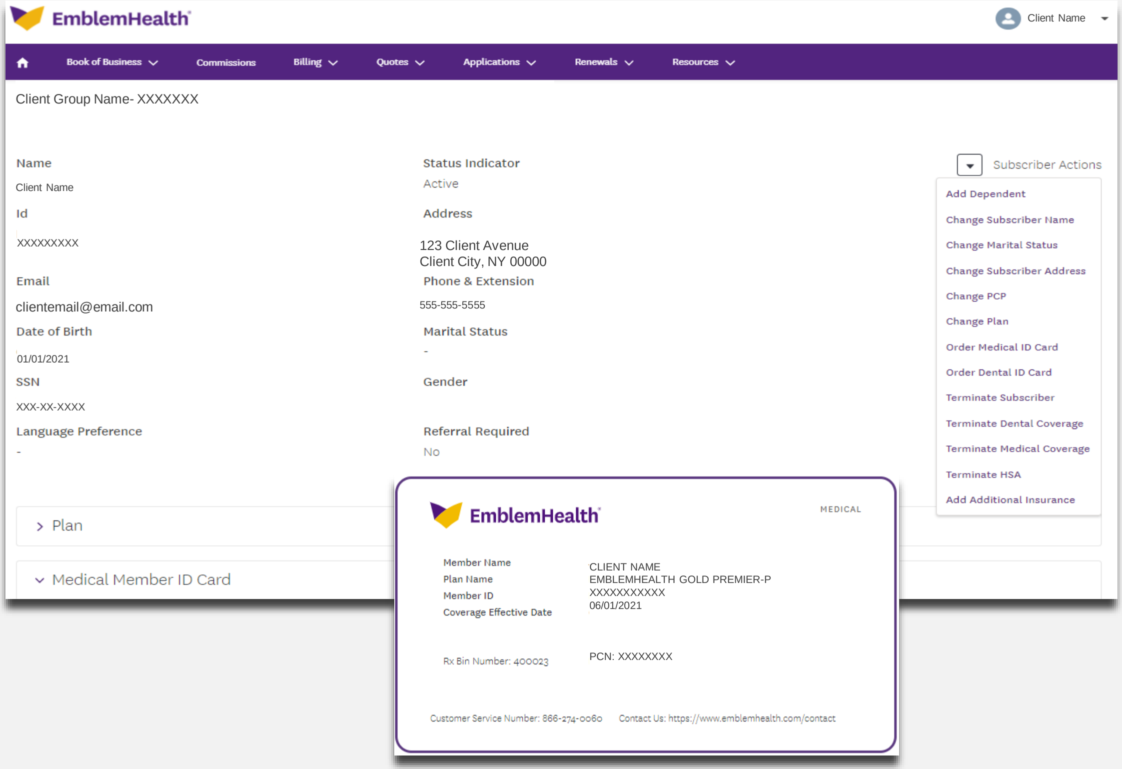
MENU HIGHLIGHTS- BOOK OF BUSINESS, SUB-GROUP CLIENT DETAILS



- 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.

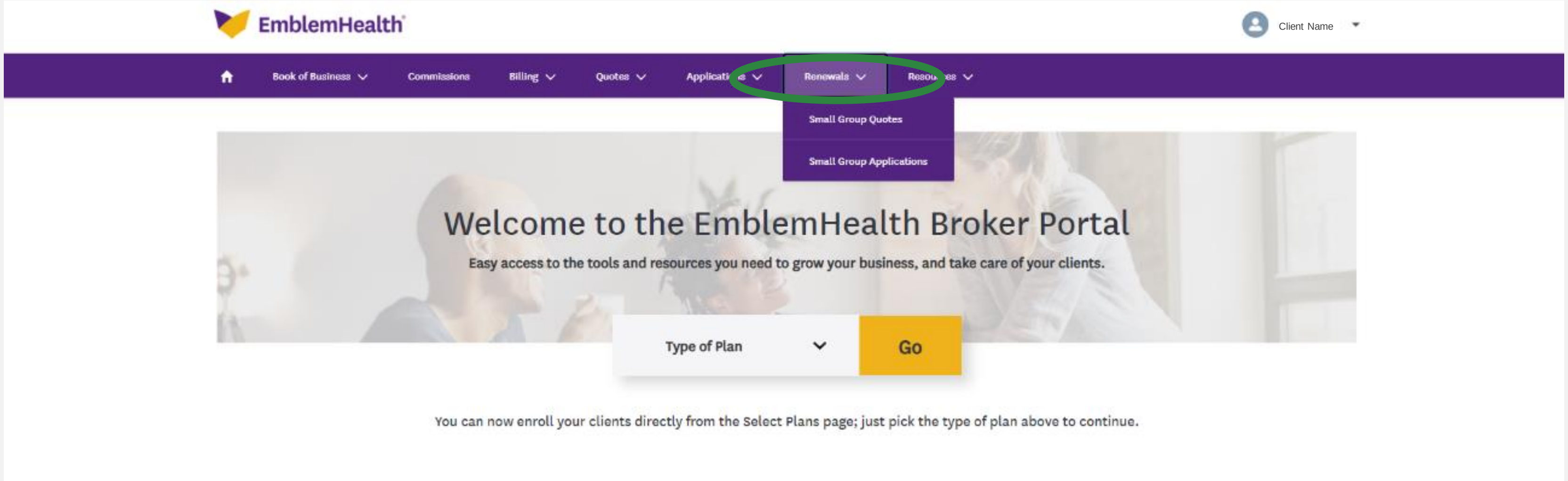
Tip: Need to find a subscriber fast? Simply use the **Search** box.

MENU HIGHLIGHTS- CLIENT DETAILS FOR INDIVIDUALS

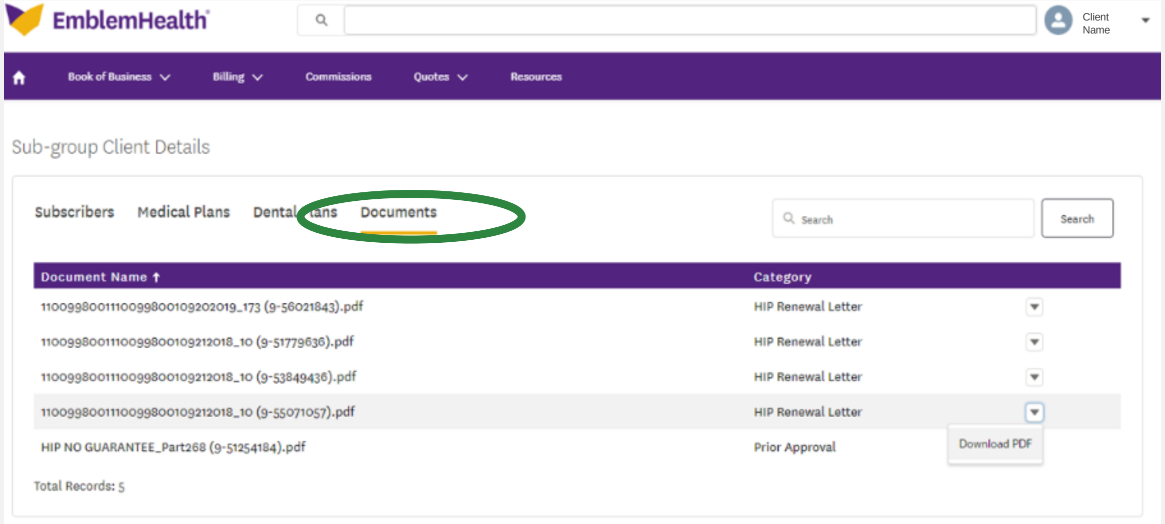


- Under **Client Details** for individual and family, you can:
  - Add dependent
  - Change name, marital status, address or PCP
  - Order medical and/or dental ID cards
  - Renew coverage
  - Terminate subscriber, medical coverage and dental coverage
- You can also view:
  - Plan documents and download 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



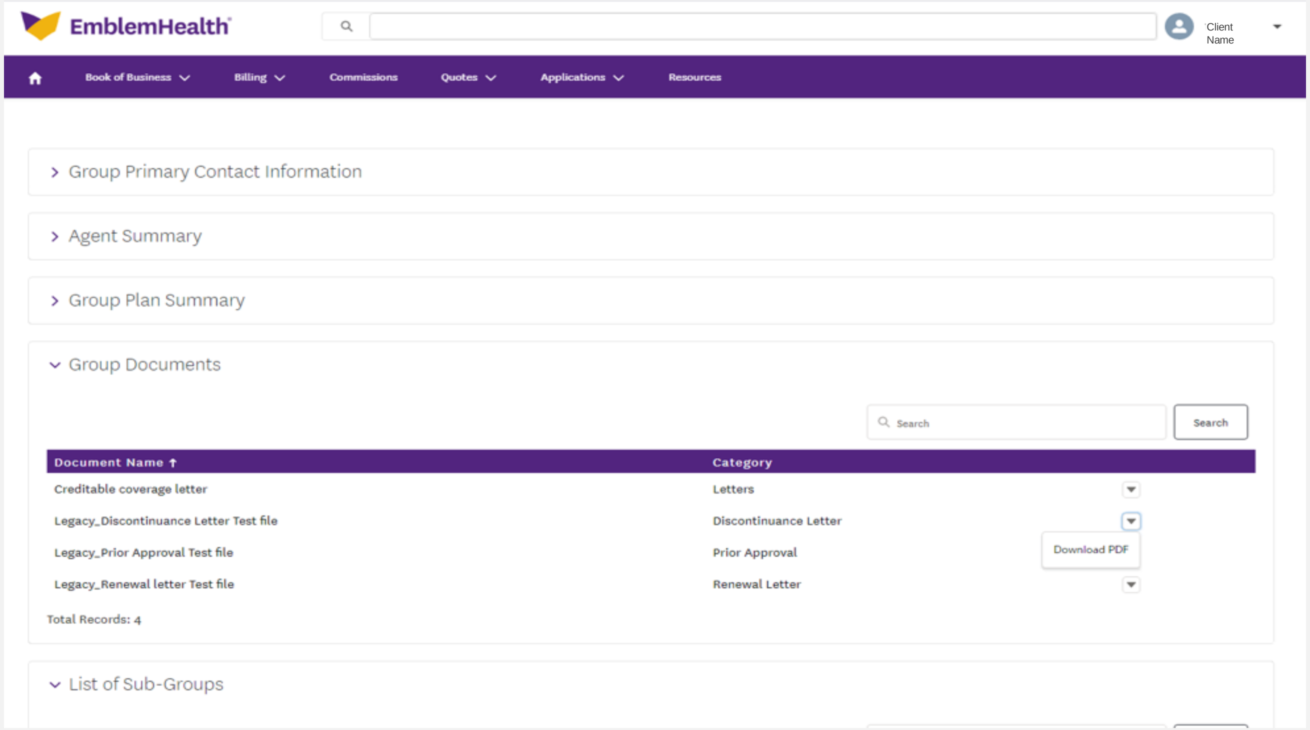
MENU HIGHLIGHTS- SMALL AND LARGE GROUP RENEWAL LETTERS



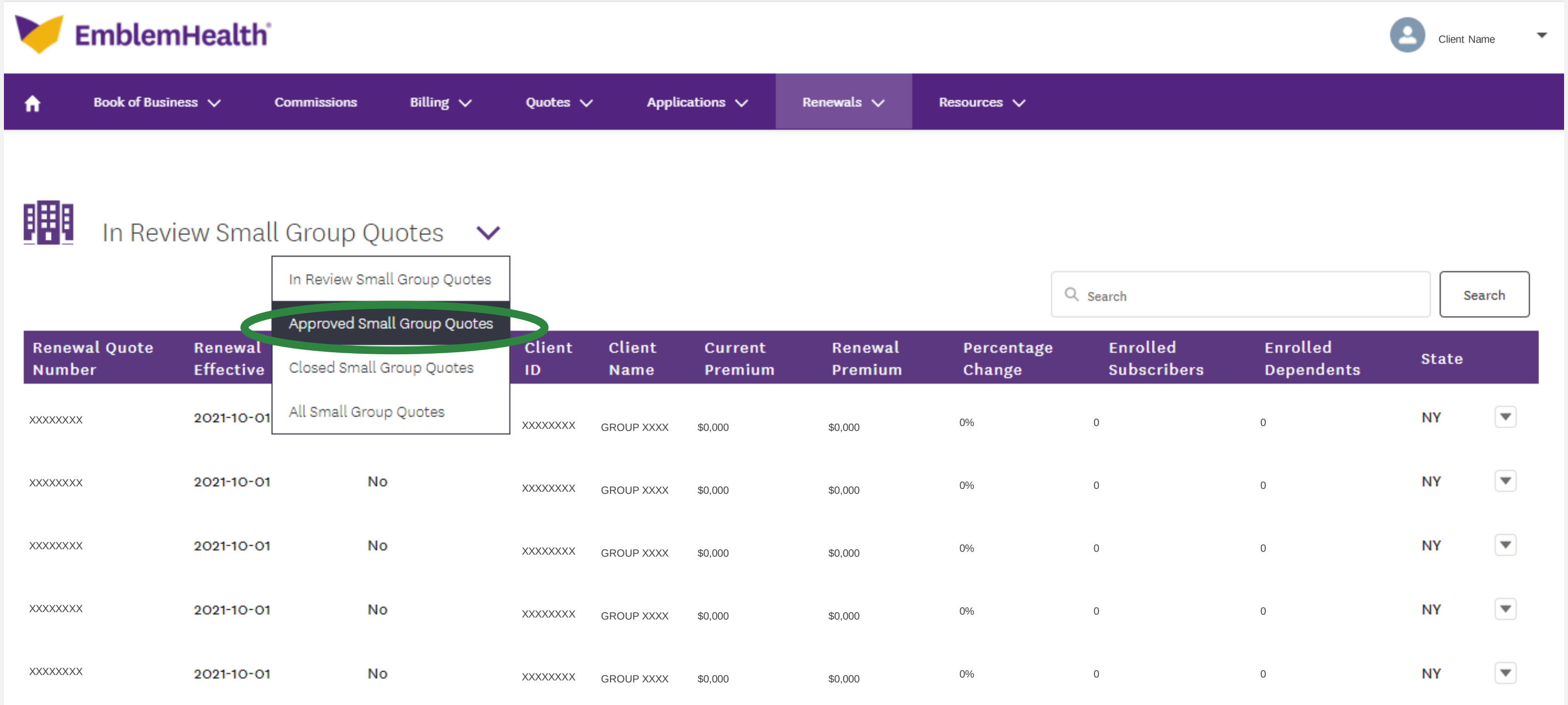
- On sub-group client details, click the Documents tab.
- Click on the down arrow to the right of the category to download it as a PDF.

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

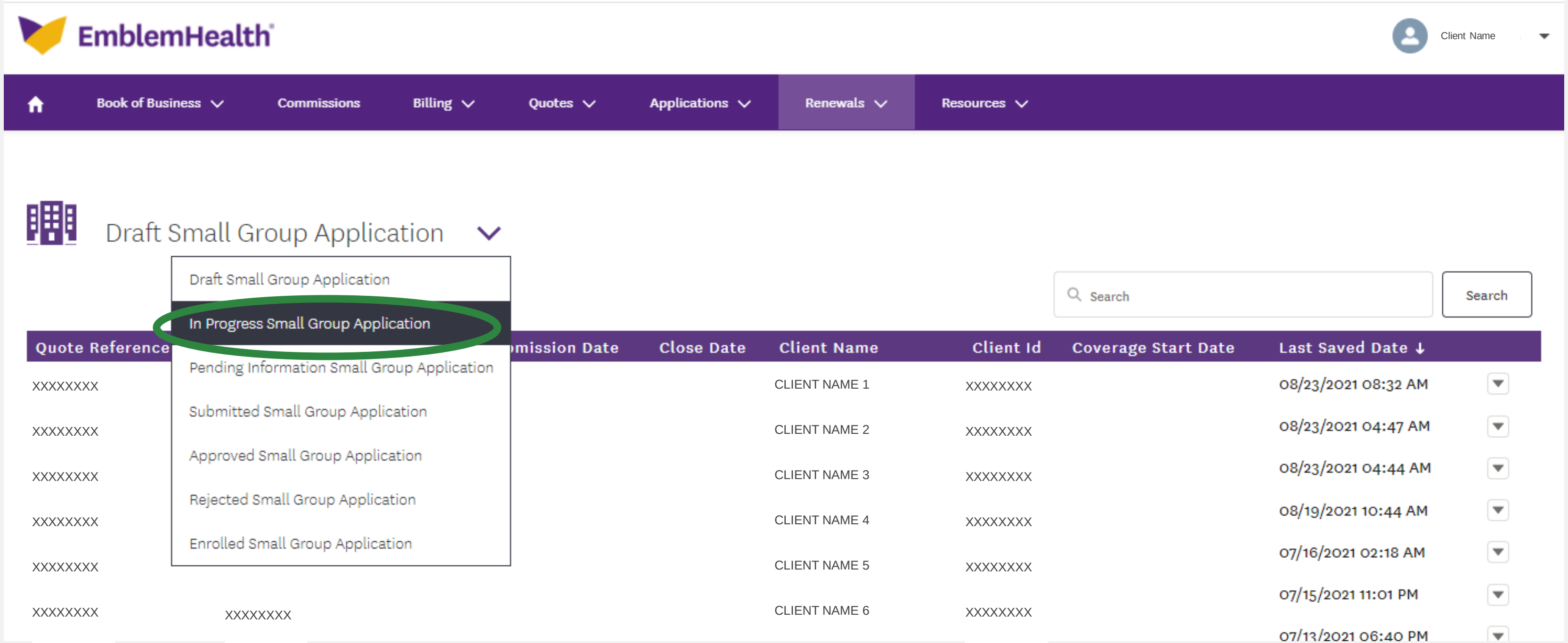
MENU HIGHLIGHTS- LARGE GROUP:
OTHER DOCUMENTS ARE AVAILABLE TO DOWNLOAD ON THE GROUP LEVEL



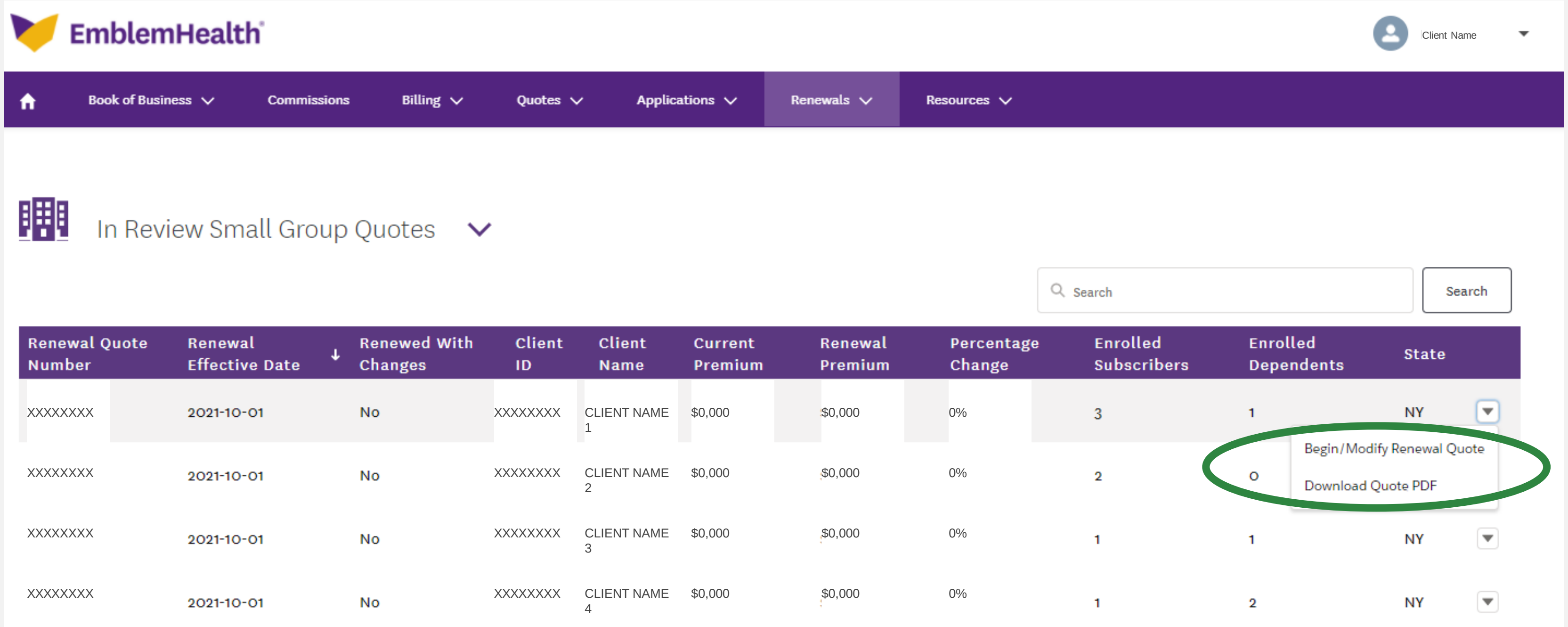
MENU HIGHLIGHTS- SMALL GROUP QUOTES



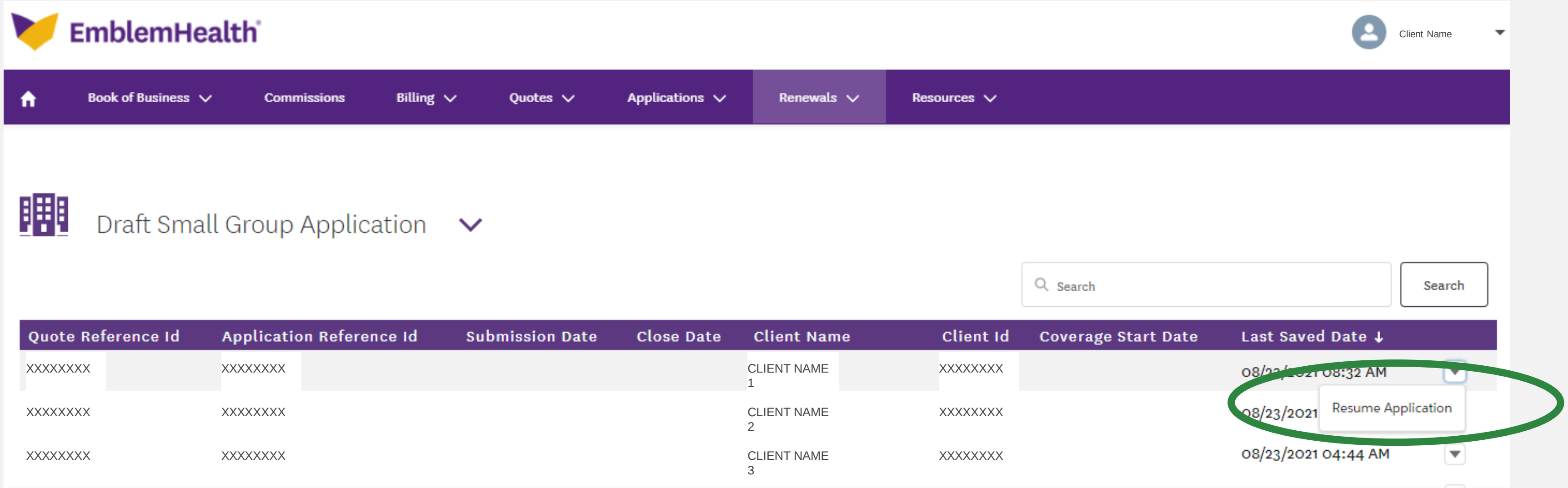
MENU HIGHLIGHTS- SMALL GROUP APPLICATION



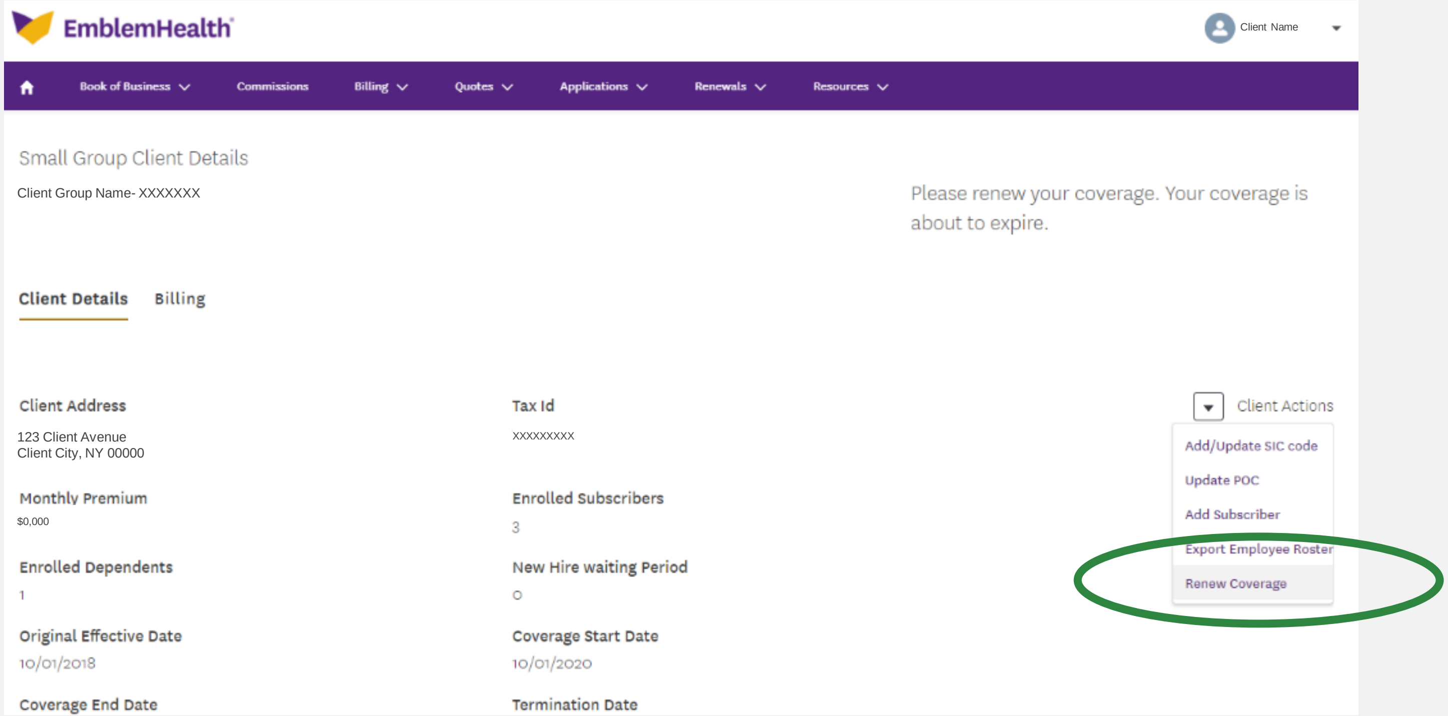
MENU HIGHLIGHTS- MODIFY RENEWAL QUOTE AND DOWNLOAD QUOTE PDF



MENU HIGHLIGHTS- RESUME SMALL GROUP APPLICATION



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

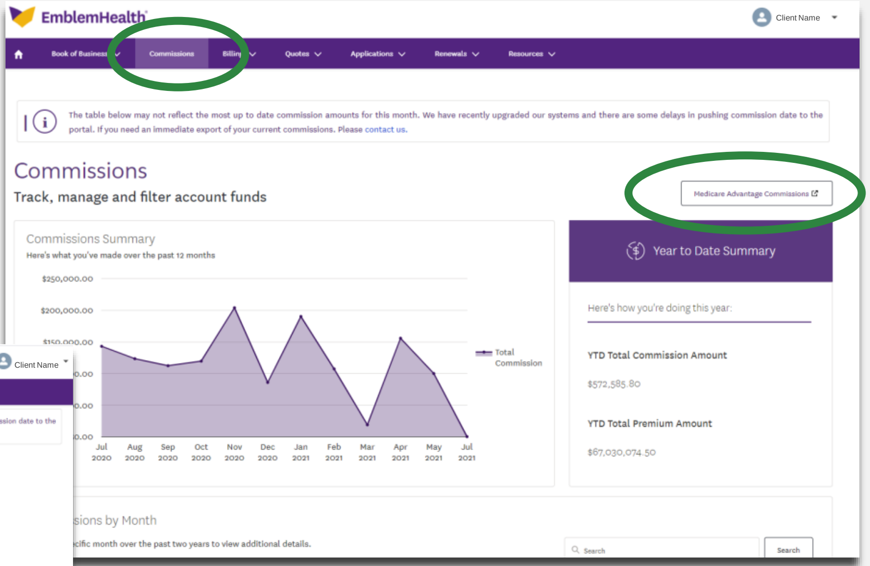


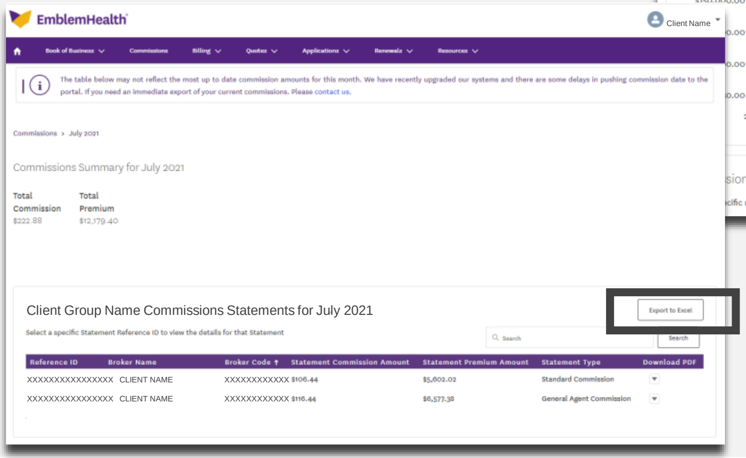
MENU HIGHLIGHTS- COMMISSIONS

View your commissions:

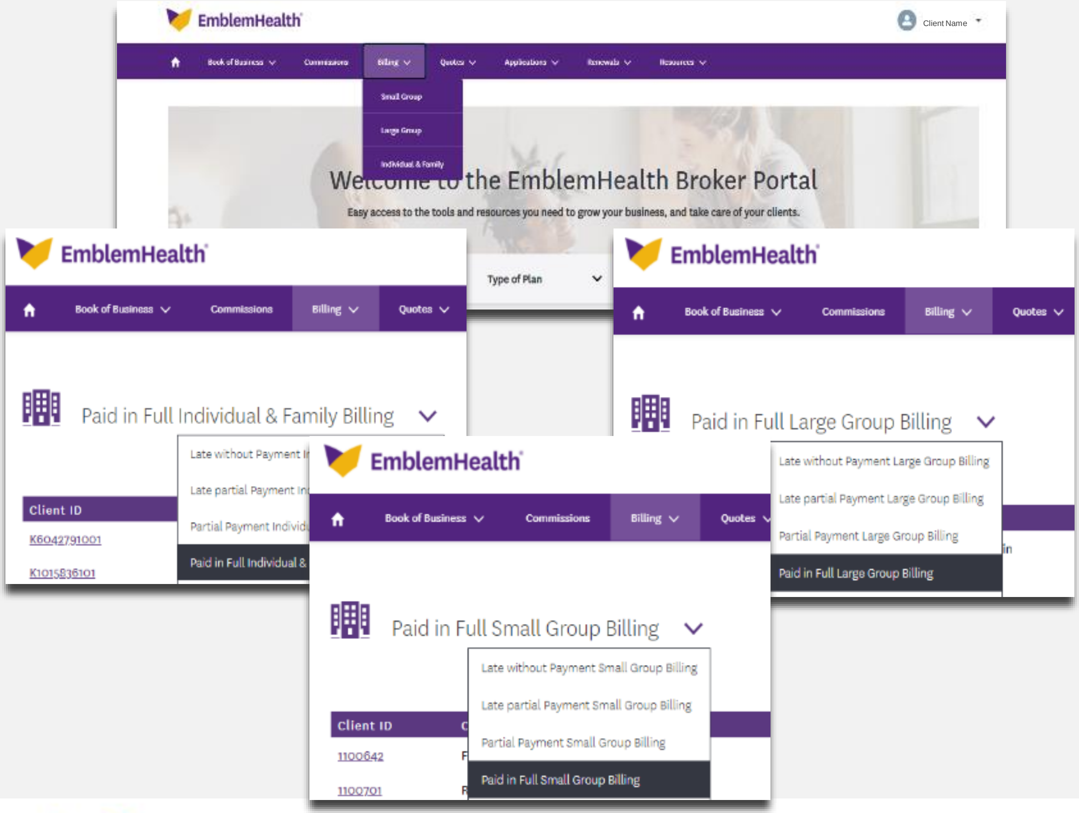
- Year-to-date summary
- Monthly statements
- Statement details under agent summary or individual and group clients

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



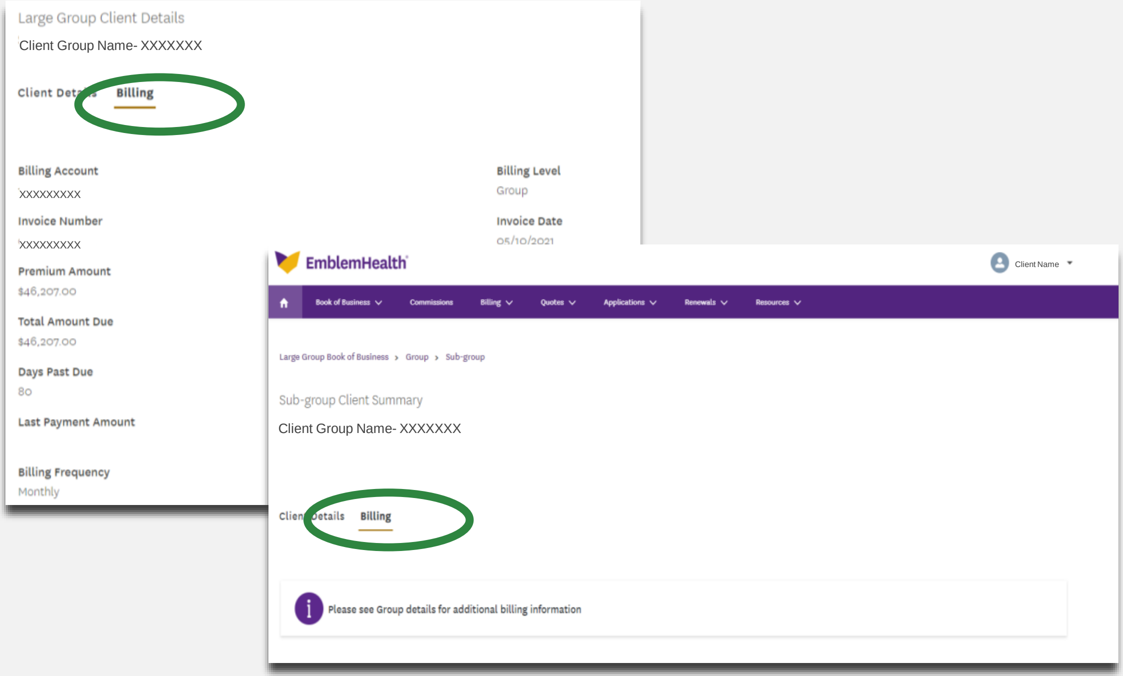


MENU HIGHLIGHTS- BILLING



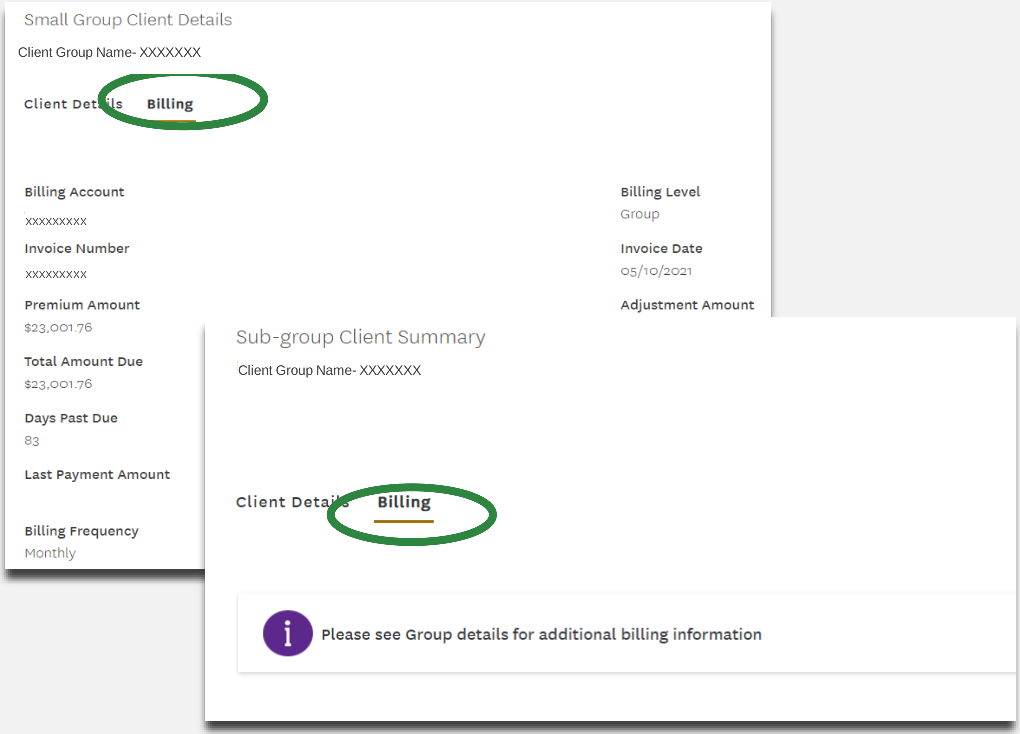
- View billing details for your clients with the following plans:
  - Small group
  - Large group
  - Individual & family
- Under details for each segment, you can see which clients are:
  - Late with or without partial payment
  - Paid partially or in full
  - Still unpaid
- Select the **Client ID**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

MENU HIGHLIGHTS- LARGE GROUP BILLING



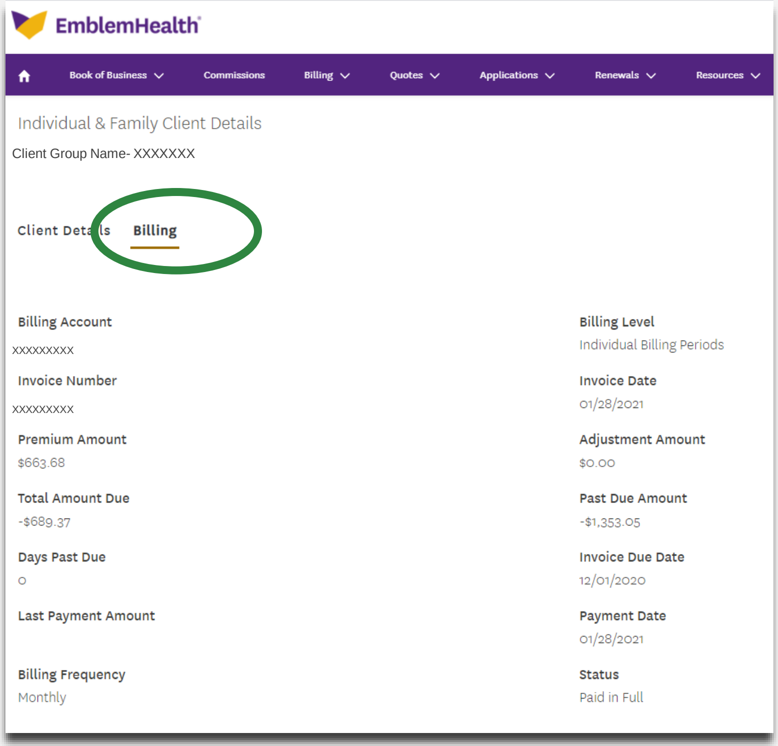
- Billing details are available in the group or sub-group section of your client details page. Go to the:
  - **Billing** tab under the client details page, or
  - **List of Sub-Groups** to select the client ID and then the **Billing** tab.
- Billing details will include invoice and payment history (last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

MENU HIGHLIGHTS- SMALL GROUP BILLING



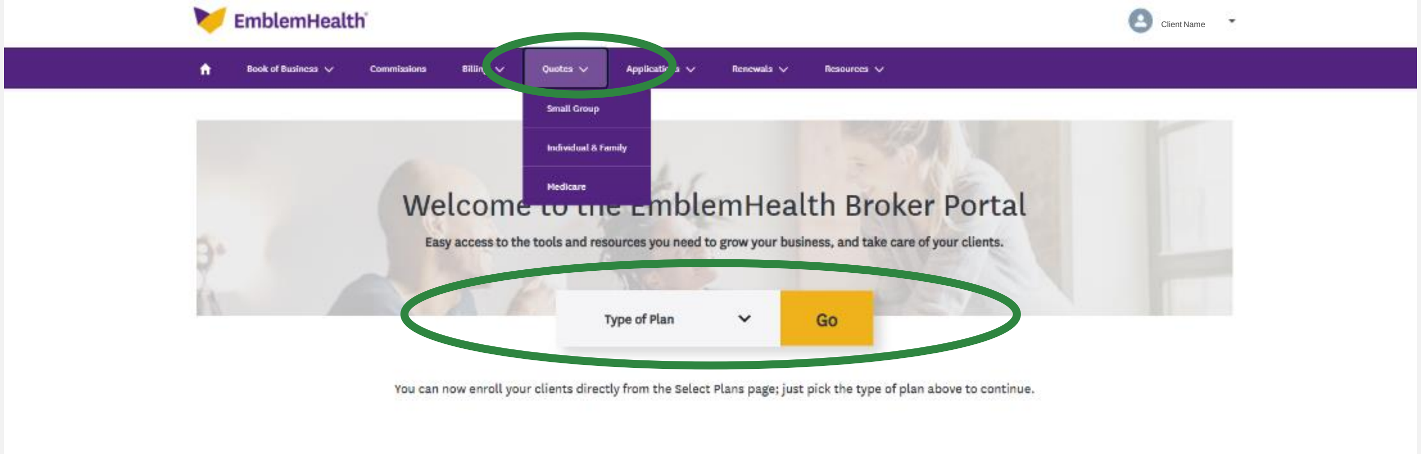
- Billing details are available in the group or sub-group section of your client details page. Go to the:
    - **Billing** tab under the client details page, or
    - **List of Sub-Groups** to select the client ID and then the **Billing** tab.
- Billing details will include invoice and payment history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

MENU HIGHLIGHTS- INDIVIDUAL BILLING



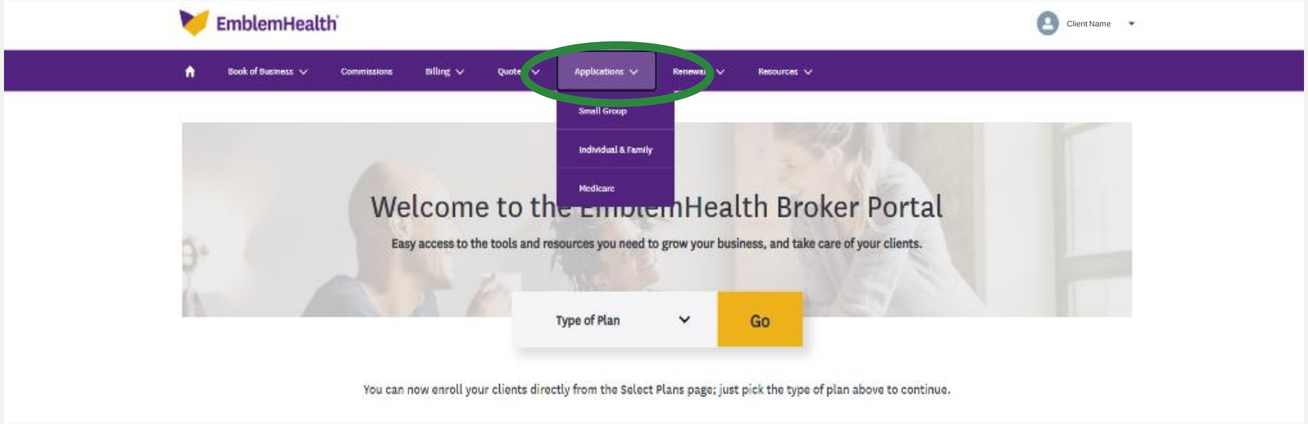
- To view individual billing details, go to the **Billing** tab under client details.
- Billing details will be shown, including more information on invoice and payment history (last 24 months).

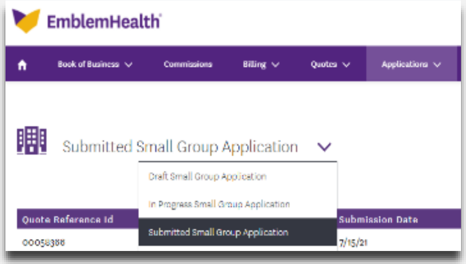
MENU HIGHLIGHTS- QUOTES

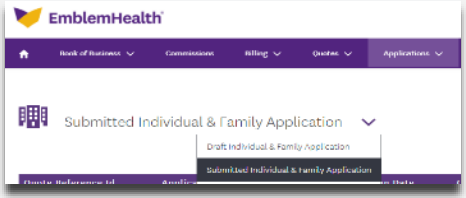


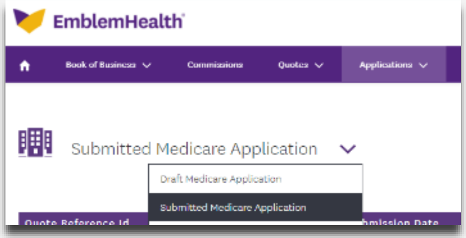
- Use the **Create a Quote** section on the broker dashboard to generate quotes for your **Small Group**, **Individual & family**, and **Medicare** and clients. For large group clients, please contact your sales executive or account manager for assistance.
- Follow the on-screen prompts to complete the 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



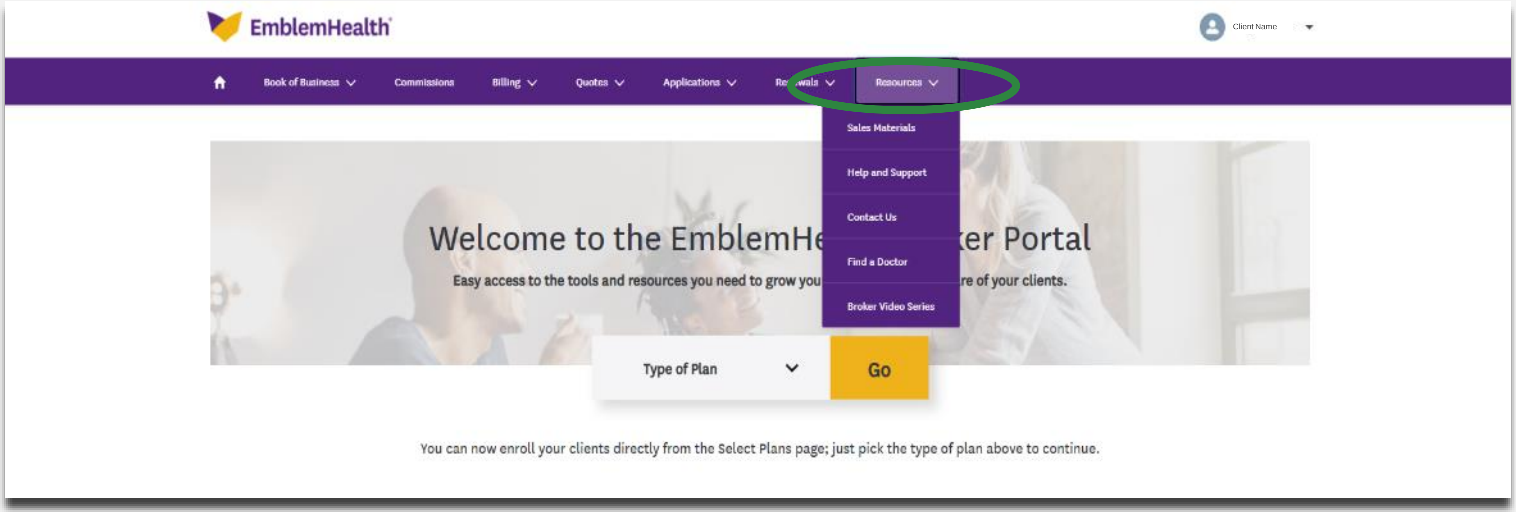






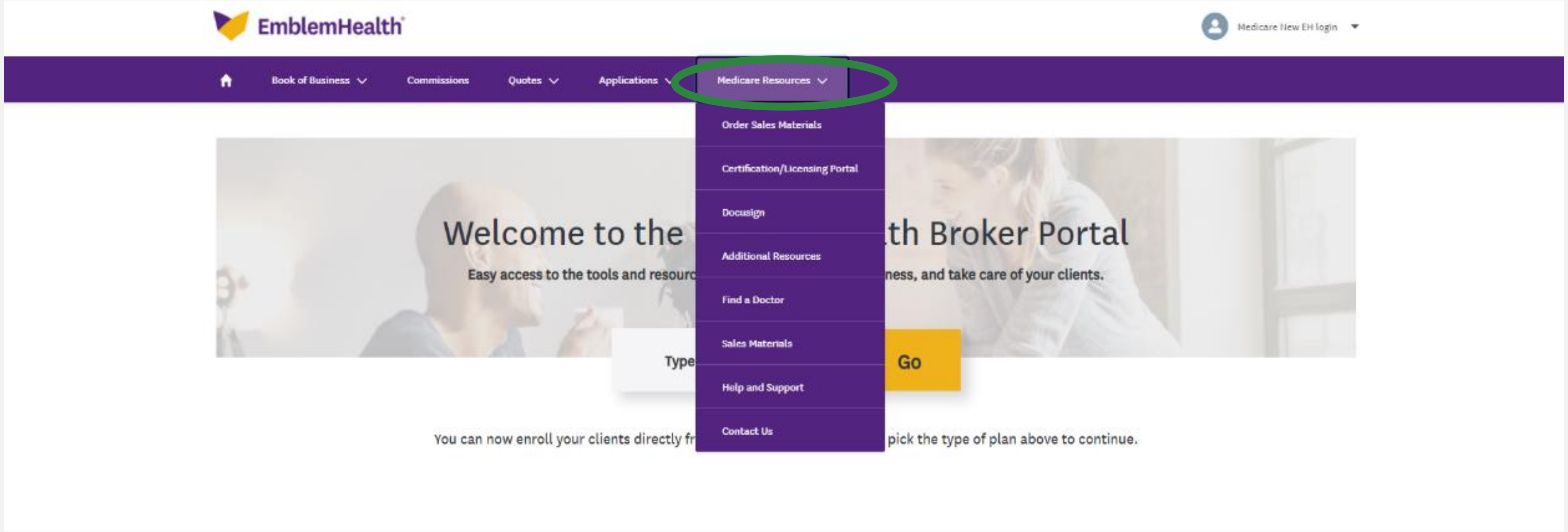
- View applications for **Small group, Individual & family** and **Medicare** clients under this drop-down menu.
- For large group clients, please contact your sales executive or account manager for assistance.

MENU HIGHLIGHTS- RESOURCES



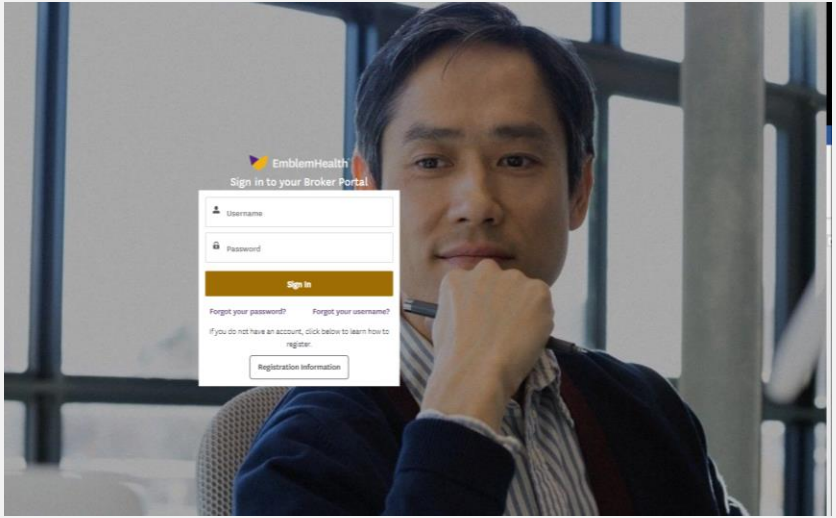
- Find **Resources** here, including sales materials, help and support, and how to contact us.
- If you still have questions, the **[Help and Support](#)** page has more detailed answers on how to navigate the secure broker website

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: Prinicipal 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