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KANSAS FARM BUREAU Health Plans

FBHP Broker Portal: Train the Trainer User Material

July 2023

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Capabilities Covered in Training

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2	Home Page Overview
3	Profile
4	Settings
5	Contact Information
6	Leads
7	Opportunities
8	Contacts
9	Accounts
10	Quotes
11	Applications
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14	Email/Phone/Address Update
15	Plan Information Details & Benefit Exclusion
16	Dependent Information
17	Provider Search
18	Claims Information
19	Plan Drop Options
20	Payment Management

#	Capability
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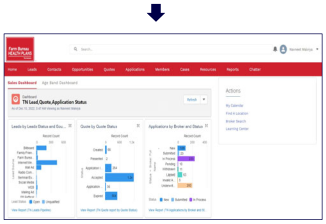
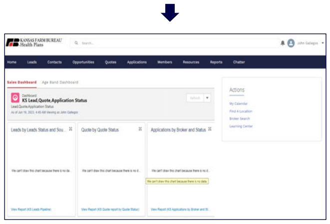
Disclaimer:

All the buttons and links are same across states except the colour scheme which is different for different states as shown below:

Farm Bureau- Tennessee



Farm Bureau- Kansas



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Login/Logout & Password Reset

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Login/Logout & Password Reset

FBHP Broker

Applicable Roles:
- *State Health Plan Manager*
- *Non-TN Sales Agent*

- Users can log in the Broker Portal via "https://fbhp.my.site.com/brokerportal"
- Users can also use "Forgot Password" to reset their own password through a verification process.
- Users can manually log out by clicking the profile icon and select logout.

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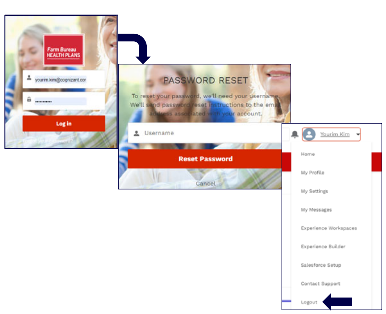
Login/Logout & Password Reset

To Log-in to your Broker Portal, simply go to https://fbhp.my.site.com/brokerportal and enter your Username and Password

If you forgot your password, you could click on "Forgot your password?" and reset password. The how-to instruction will be sent to the email associated with the Broker Portal

To logout of your Broker Portal, you can click on your profile icon and select logout at the bottom



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Home Page Overview

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Home Page Overview

FBHP Broker

Applicable Roles:
- *Non-TN Sales Agent*
- *State Health Plan Manager*

- The Broker Portal home page is the landing screen that end-users will see when first logging in
- The home page can be customized to highlight role-based information

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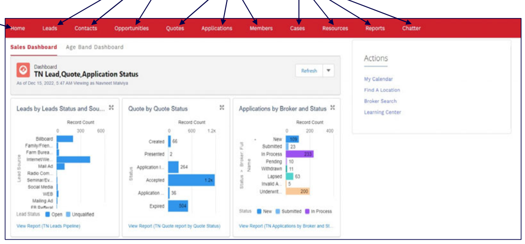
Navigating the Home Screen

The home screen is landing page for the Broker Portal.

Details on leads, contacts, opportunities, quotes, applications, members, resources, reports, and chatter through can be found through links here



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Profile

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Profile

FBHP Broker

Applicable Roles:
- *State Health Plan Manager*
- *Non-TN Sales Agent*

- **"My Profile"** page enables a Broker to view and update personal information like name, contact (email, phone, address), and social media links
- Anyone authorized to use Broker Portal has access to a profile

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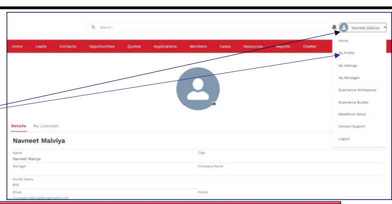
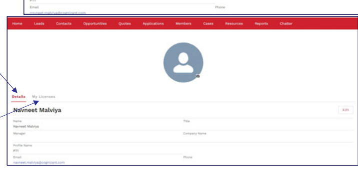
Profile (1 of 2)



"My Profile" page is accessed by clicking your name in the upper right corner of Broker Portal Home page and then selecting "My Profile"

Profile details are displayed by default



License information (if available) will be displayed in "My Licenses" tab

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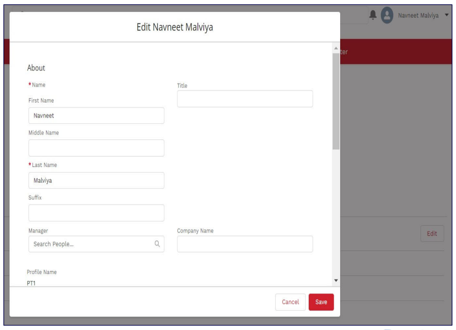
Profile (2 of 2)

Click "Edit" to edit details in the Pop-up window



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Settings

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Settings

FBHP Broker

Applicable Roles:
- *State Health Plan Manager*
- *Non-TN Sales Agent*

- **"My Settings"** page enables a Broker to update information about Broker such as email, password, location, profile visibility and set up email notification options
- Anyone who is authorized to use Broker Portal has access to this information

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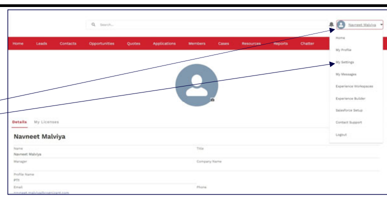
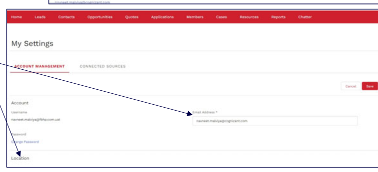
Settings (1 of 2)

"My Settings" page is accessed by clicking your name in the upper right corner of Broker Portal "Home Page" and then selecting "My Settings"



Email and location can be updated here from this section



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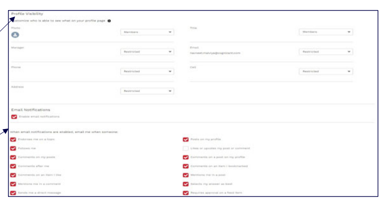
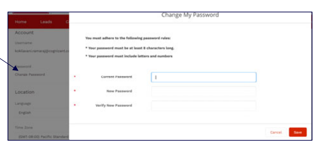
Settings (2 of 2)

The "Profile Visibility" section enables Brokers to select what information is displayed to who (Restricted, Member, Public) as part of Profile

Enable "Email Notifications" and select types of notifications



Click "Change password", enter the details in pop-up and save to create a new password



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Contact Information

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Contact Information

FBHP Broker

Applicable Roles:
- *State Health Plan Manager*
- *Non-TN Sales Agent*

- **"Contact Us"** page contains support information like phone number and email for various types of support like Member and Agent questions, Teladoc, UMR etc.
- Contact information can be either common or state-specific depending on location
- Anyone authorized to use Broker Portal has access to the contact us page

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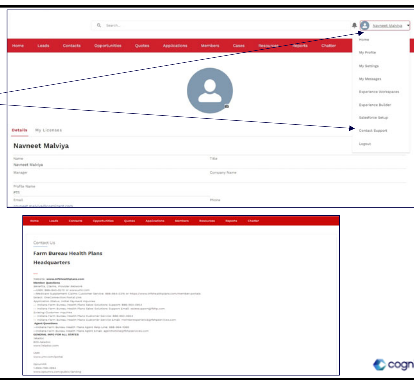
Contact Information

"Contact Support" page is accessed by clicking your name in the upper right corner of Broker Portal home page and then selecting "Contact Support"

View the "Contact Us" page where information is displayed in sections



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Leads

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Leads – Overview

FBHP Broker

Applicable Roles:
- *State Health Plan Manager*
- *Non-TN Sales Agent*

- Leads are created by brokers in the Broker Portal when they have information about a new prospect. Becoming a lead is the first step in the sales cycle.
- Leads can also be imported by the FBHP Marketing team and assigned to individual brokers for further steps
- The Broker portal uses 4 stages for a lead –
  - Open *(Default status - Lead created in Broker portal but not yet contacted)*
  - Contacted *(Manual change - Broker contacted the lead)*
  - Qualified (*Automatic Change – Lead has been converted to a contact/opportunity/account*)
  - Unqualified *(Manual change - Lead is not ready to buy or make a transaction)*
- Access to the Leads module is as per the roles of the user which is given below:

S No	Role	Access
1	TN Sales Solutions Manager and TN FBHP Sales Agent	Can create leads for all states (TN, KS, MI, IN, SD)
2	TN RSR	Can create leads only for TN state
3	TN CO Health Rep	Can create leads for his county in TN only
4	Non-TN Sales Agent	Can create leads for their own state only

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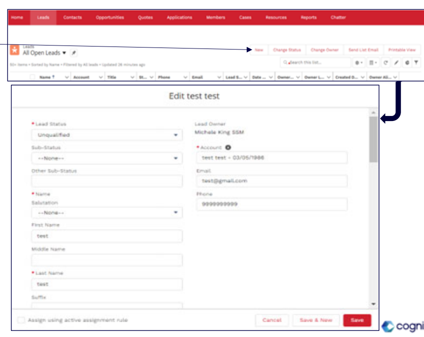
Create Lead (1 of 2)

Go to "Leads" page on the Broker portal and click on "New"

Fill in the necessary lead information on the "New Lead" pop-up

Lead Status, Sub-status, Salutation, First name, Last Name, and Lead Source fields should be entered at the time of lead conversion

Email or Phone/Mobile should be entered at the time of lead conversion



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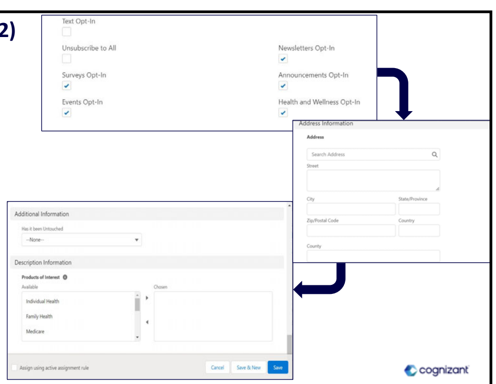
Create Lead (1 of 2)

Fill in the information regarding the communication preferences

Select Email Opt-Out and/or Do Not Call fields as per prospect's preference

Fill in the necessary address information

Fill additional information related to status of the lead, product of interest, etc.



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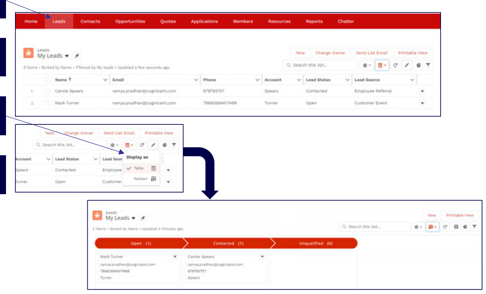
View Leads

Go to "Leads" page on the Broker Portal

The default view on the Leads page is a "Table" display

Change display to "Kanban" view using this option

The Kanban view shows leads categorized by Lead status



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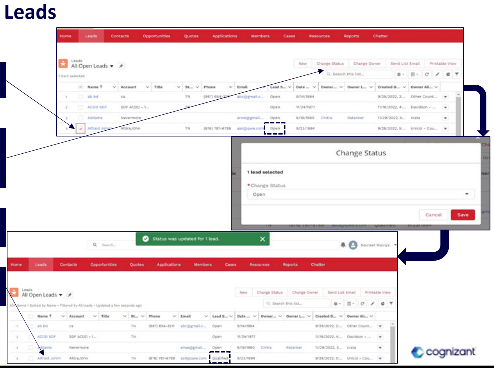
Change Status of Leads

Go to Leads page on the Broker Portal and select a particular lead

Click on the Change Status button and select from the drop down the status that the lead needs to be moved to

Then click on "Save" button

The status of lead is changed as shown



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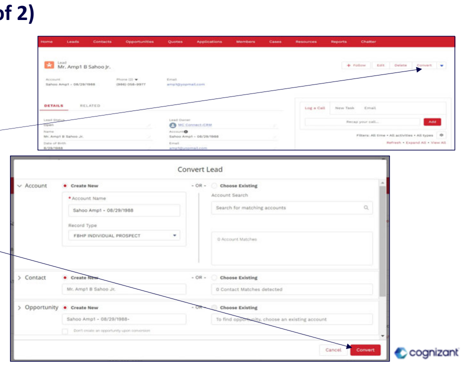
Convert a Lead (1 of 2)

Go to Leads page on the Broker portal and open a particular lead

Click on "Convert" option to enter details for Account, Contact, and Opportunity for lead conversion

Choose existing Account/Contact/Opportunity or create new and Click on "Convert" button



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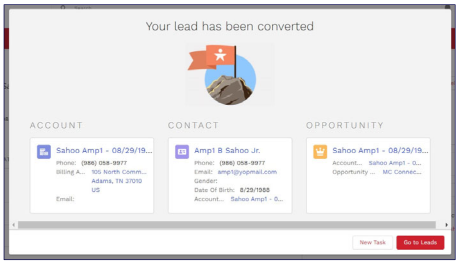
Convert a Lead (2 of 2)

When a lead is converted, new account, contact and opportunity are created

After conversion, the lead cannot be accessed from the Leads page in the Broker portal



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Opportunities

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Opportunities - Overview

FBHP Broker

Applicable Roles:
- *State Health Plan Manager*
- *Non-TN Sales Agent*

- When a lead is contacted and qualified, it is converted into an Opportunity
- The Broker portal uses 5 stages for an opportunity –
  - Qualification *(Default status – When opportunity is created in Broker portal)*
  - Proposal *(Automatic change – When a quote is created from the opportunity)*
  - Application Cycle *(Automatic change – When an application is initiated from the quote)*
  - *Decision Complete (Automatic change – When application underwriting is complete)*
  - Closed *(Automatic change – When application is approved OR initial payment is received)*
- Access to the Opportunity module is as per the roles of the user which is given below:

S No	Role	Access
1	Non-TN Sales Agent	Can create opportunities only for their own state
2	State Health Plan Manager	Can create opportunity; View - for opportunities created by other brokers in state Edit - for opportunities created by brokers in state

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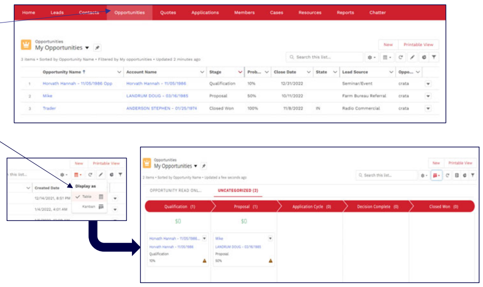
View Opportunities

Go to "Opportunities" page on the Broker portal

The default view on the Opportunities page is "Table" display

Change display to "Kanban" view

The Kanban view shows opportunities categorized by Opportunity status



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Opportunities – Details (1 of 2)

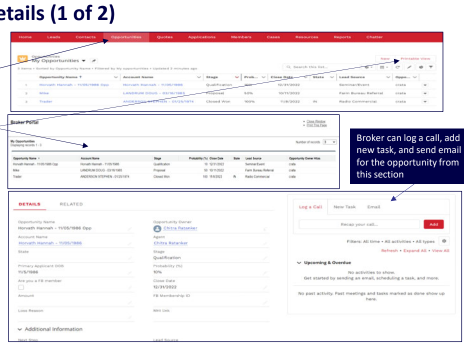
Go to Opportunities page on the Broker portal

Click on "Printable View" to see this screen and print opportunities

Open a particular opportunity and see details of the Opportunity in "Details" tab

Primary Applicant DOB should be mandatorily entered before quote creation. *If >65years, quote creation is not allowed*

Broker can log a call, add new task, and send email for the opportunity from this section



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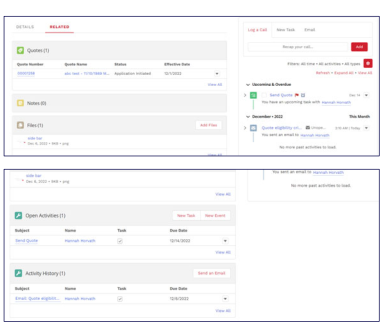
Opportunities – Details (2 of 2)

Open an opportunity to see more details in "Related" tab

Information present on the "Related" tab:
1) Quotes created from the Opportunity
2) Contacts linked
3) Notes added
4) Open activities
5) Activity history



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Contacts

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Contacts - Overview

FBHP Broker

Applicable Roles:
- *State Health Plan Manager*
- *Non- TN Sales Agent*

- Contacts store individual's demographic information (i.e., phone numbers and email addresses that are linked to accounts)
- The trigger for Contact creation is when a lead is converted to an opportunity
- Dependents added to a quote are created as separate contacts

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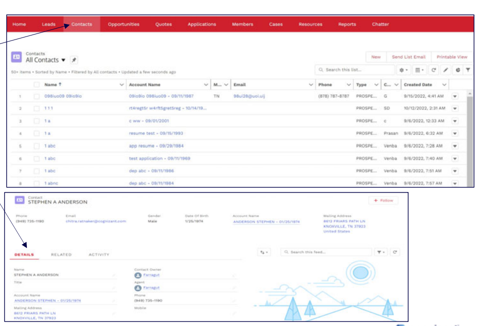
Contacts

Go to "Contacts" page on the Broker portal

Contacts are created when leads are converted to an opportunity. Dependents added to a quote are created as separate contacts

Contact can be opened and edited in on the "Details" section of the Contacts page



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Accounts

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Accounts - Overview

FBHP Broker

Applicable Roles:
- *State Health Plan Manager*
- *Non-TN Sales Agent*

- An account represents a customer household (whom you intend to sell to) in the Broker Portal
- Multiple contacts could be stored as part of the same account (i.e., Dependents)

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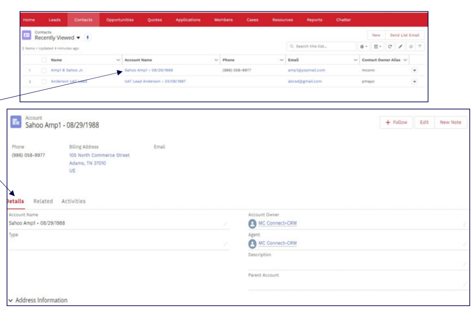
Accounts

Go to "Contacts" page on the Broker Portal

Click on the Account Name to navigate to the Accounts page

The Accounts page shows details of the account, related contacts, opportunities, and activity history



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Quotes

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Quotes - Overview

FBHP Broker

Applicable Roles:
- *Non-TN Sales Agent*
- *State Health Plan Manager*

- A quote can be created from an opportunity using the guided selling process or the non-guided process
- The Broker portal uses 6 stages for a quote –
  - Created *(Default status – When quote is created in Broker portal)*
  - Presented *(Manual change – When a quote pdf is created and shared with prospect)*
  - *Application Initiated (Initiated and saved by broker)*
  - Accepted *(Automatic change – When an application is initiated from the quote)*
  - *Application Withdrawn (Withdrawn by Applicant)*
  - Expired *(Automatic change – After 30 days of quote creation)*
- Access to the Quotes module is as per the roles of the user which is given below:

S No	Role	Access
1	Non-TN Sales Agent	Can create quotes only for their own state
2	State Health Plan Manager	Can create quotes only for their own state

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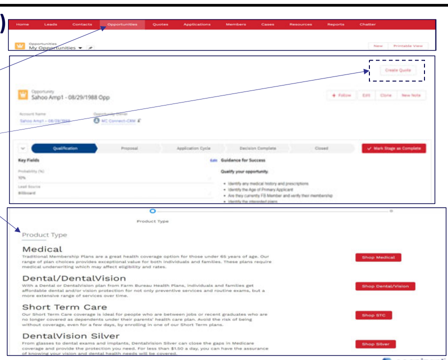
Create Quote (1 of 9)

Go to "Opportunities" page on the Broker portal

Click on "Create Quote"" to initiate quote creation

Select "Product type" from this screen



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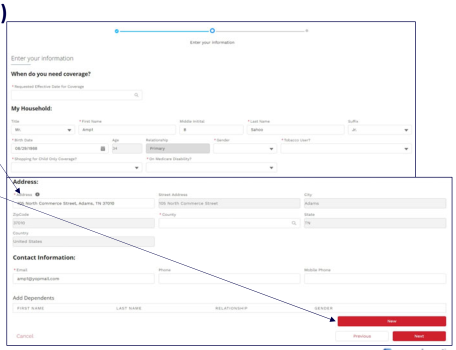
Create Quote (2 of 9)

Enter details on the Quote creation page

A validation check occurs to ensure address accuracy

Click on "New" button to add information about dependents



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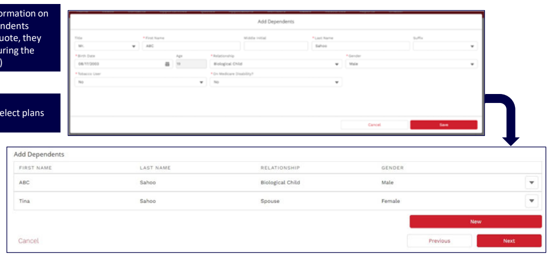
Create Quote (3 of 9)

Add dependent information on the pop-up (if dependents aren't added to a quote, they cannot be added during the application process)

Click on "Next" to select plans



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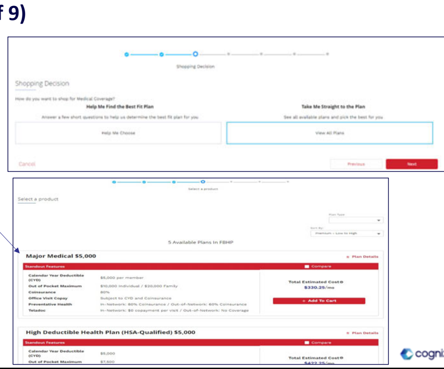
Create Quote (4 of 9)

Select "View all Plans" for non-guided flow and click on "Next" button

View available plans and features



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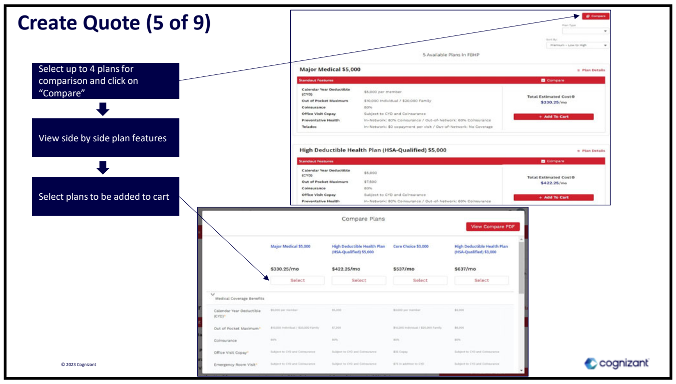
Create Quote (5 of 9)
Select up to 4 plans for comparison and click on "Compare"
View side by side plan features
Select plans to be added to cart
Compare Plans
View Compare PDF
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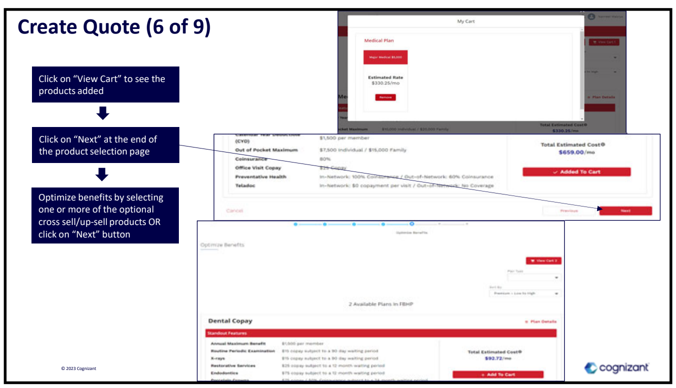
Create Quote (6 of 9)
Click on "View Cart" to see the products added
Click on "Next" at the end of the product selection page
Optimize benefits by selecting one or more of the optional cross sell/up-sell products OR click on "Next" button
My Cart
Dental Copay
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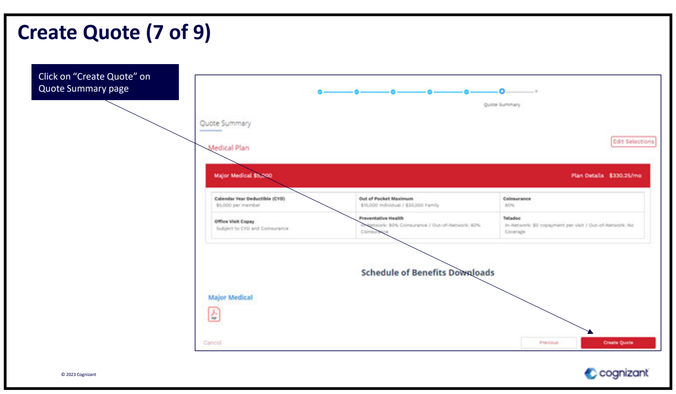
Create Quote (7 of 9)
Click on "Create Quote" on Quote Summary page
Quote Summary
Medical Plan
Edit Selections
Major Medical $5,000
Plan Details $330.25/mo
Schedule of Benefits Downloads
Major Medical
Cancel
Previous
Create Quote
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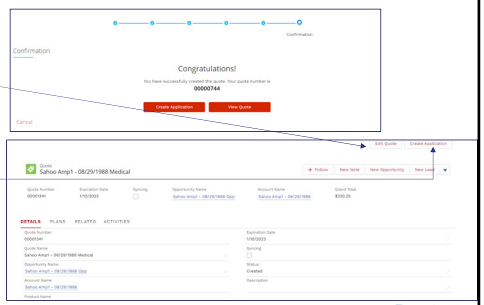
Create Quote (8 of 9)

- Click on "View Quote" to view details of the quote created
- Click on "Edit Quote" to edit the quote while quote is in either Created or Presented stage
- Click on "Create Application" to initiate application



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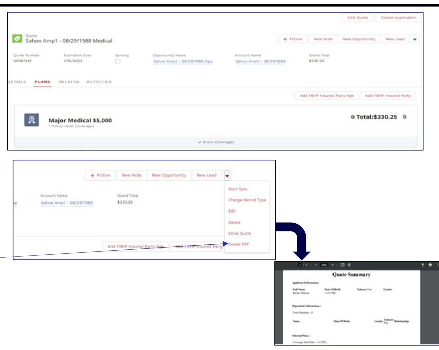
Create Quote (9 of 9)

- The Plans tab on a particular Quote's page shows the plan details in the quote
- Click on "Edit Quote" to edit the quote while quote is in either Created or Presented stage
- Click on "Create Application" to initiate application
- Click on "Create PDF" to create a Quote Pdf. This pdf can be emailed to prospect.



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Applications

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Applications - Overview

FBHP Broker

Applicable Roles:
- *Non-TN Sales Agent*
- *State Health Plan Manager*

- An application can be created from a quote
- The Broker portal uses 8 stages for an application –
  - New (Initiated and saved by broker and Application is editable)
  - Submitted *(Reason - Sent to FileNet)*
  - In Process *(Reason - Under review, In Underwriting)*
  - *Pending (Reason - Request Sent to Applicant for Additional Information, Request Sent to Applicant for Medical Records)*
  - *Withdrawn (Reason - Withdrawn by Applicant)*
  - *Lapsed (Reason - Expired Due to Inaction by Applicant for 30 days)*
  - *Invalid Application (Request for Resubmission with Additional Documentation; Original Application will not be editable, and user will have to start the shopping process again)*
  - *Underwriting Complete (Underwriting decision complete)*
- *Access to the Quotes module is as per the roles of the user which is given below:*

S No	Role	Access
1	Non-TN Sales Agent	Can create applications for their own state only Can only view applications from other states
2	Independent Agent Manager/Captive; Independent Agents/Captive Agents; **State Health Plan Manager**	Can create applications; Has edit Access if they are owner Can View all applications present in state if they are not the owner

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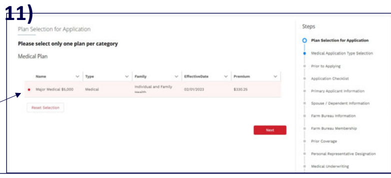
Create Application (1 of 11)

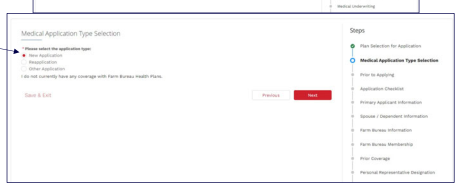
Open a quote and click on "Create Application" to initiate application

Select the Plan from the options given

Select Application Type as "New Application" OR "Re-application" OR "Other Application" based on the scenario

Click on "Save & Exit" at any step to save the application and resume updating later from the Quotes page





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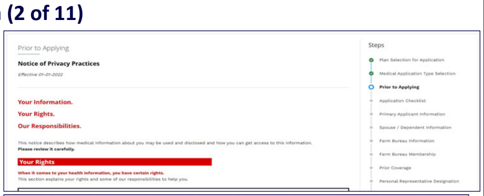
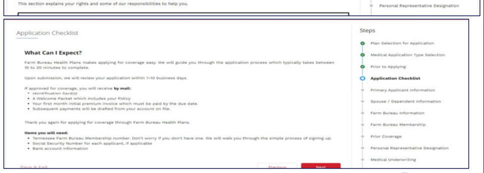
Create Application (2 of 11)

Prior to applying, Privacy notice needs to be accepted

The next page shows the Application Checklist for what the member can expect





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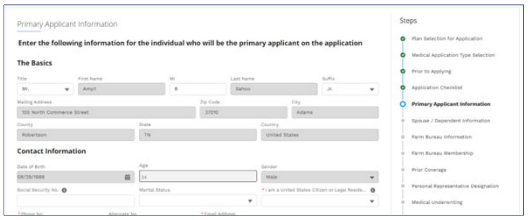
Create Application (3 of 11)

Fill in the Primary Application information details



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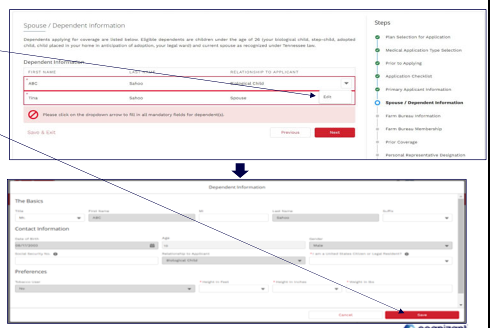
Create Application (4 of 11)

Click on "Edit" to open a pop-up and add necessary information for each dependent

Click on "Save" to save the information for each dependent



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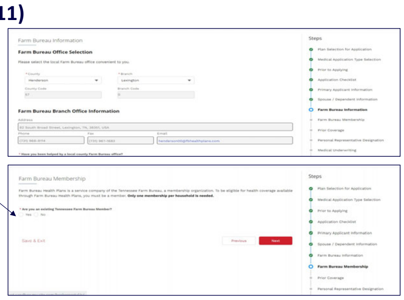
Create Application (5 of 11)

Enter Farm Bureau Information details

Enter Farm Bureau Membership details: If "Yes" then enter the Membership Name and Membership number, if "No" then electronically sign the agreement



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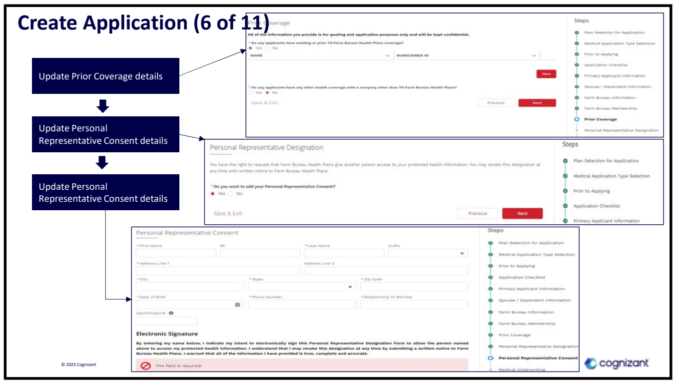
Create Application (6 of 11)
Update Prior Coverage details
Update Personal Representative Consent details
Update Personal Representative Consent details
Personal Representative Designation
Personal Representative Consent
Steps
Electronic Signature
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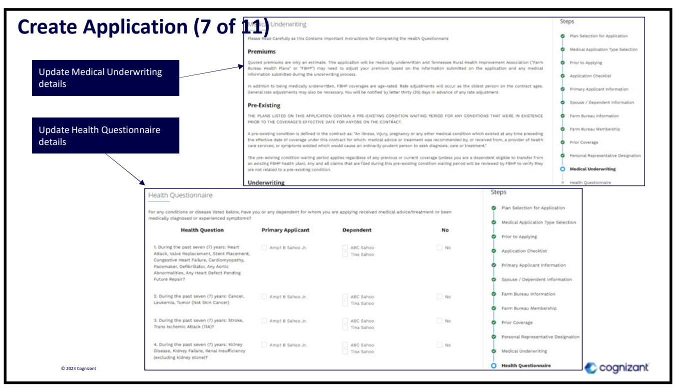
Create Application (7 of 11)
Update Medical Underwriting details
Update Health Questionnaire details
Premiums
Pre-Existing
Underwriting
Health Questionnaire
Steps
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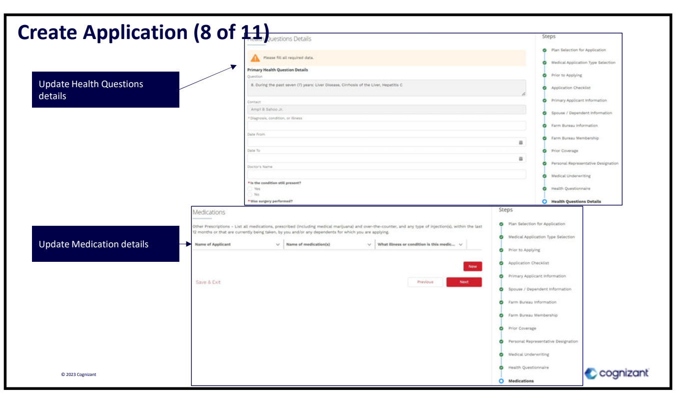
Create Application (8 of 11)
Update Health Questions details
Update Medication details
Medications
Steps
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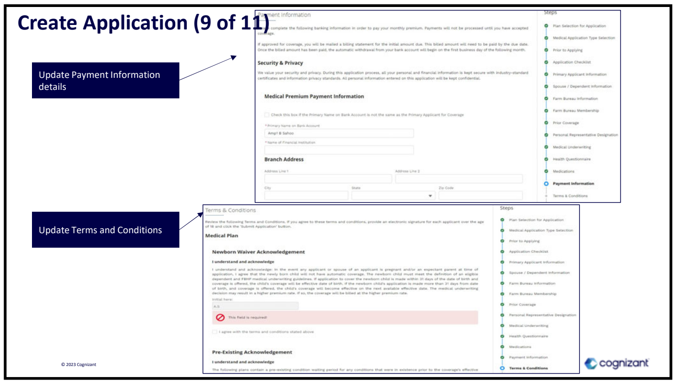
Create Application (9 of 11)
Update Payment Information details
Update Terms and Conditions
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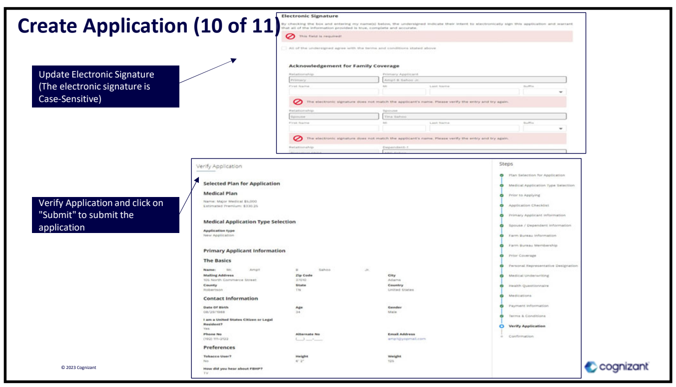
Create Application (10 of 11)
Update Electronic Signature (The electronic signature is Case-Sensitive)
Verify Application and click on "Submit" to submit the application
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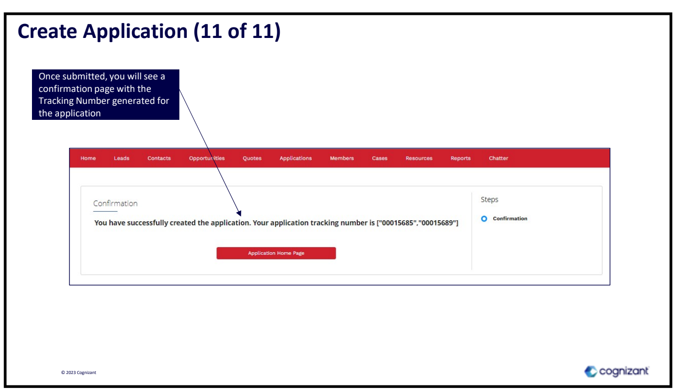
Create Application (11 of 11)
Once submitted, you will see a confirmation page with the Tracking Number generated for the application
Confirmation
You have successfully created the application. Your application tracking number is ["00015685","00015689"]
Application Home Page
Steps
Confirmation
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Resume Application

Go to Quotes page on the Broker Portal and open a particular quote

Click on "Resume Application" to resume updating a saved application

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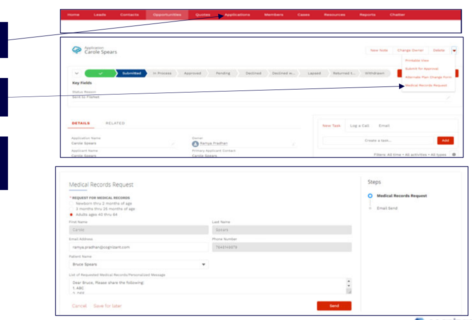
Medical Records Request

Go to Applications page on the Broker portal and open a particular application

Click on "Medical Records Request" to initiate request

An email is automatically sent from Broker Portal to prospect with Request for Medical Records



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Member 360^{0} View

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Member 360°

FBHP Broker

Applicable Roles:
- *Non-TN Sales Agent*
- *State Health Plan Manager*

- "**Member 360°**" page enables a Broker to access Member details and make updates
- A broad array of capabilities can be accessed from Member 360, such as: Subscriber information, dependent information, payments, Reconsideration Forms, plan drop options, change plan, add dependent, plan transfer, etc.

Note:

- We will be covering Summary, Forms, and Customer Sentiment as part of this capability session and other capabilities will be covered as individual topics

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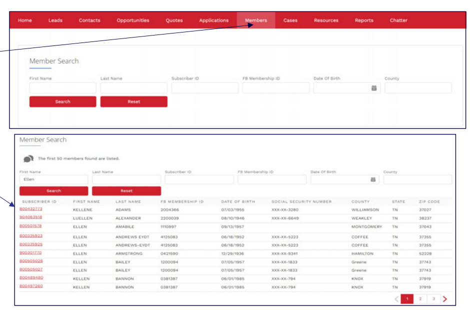
Member 360° View (1 of 6)

Member 360° view is accessed by clicking on "Members" and performing a Member Search

Select a Member to access Member details via the Member 360° view



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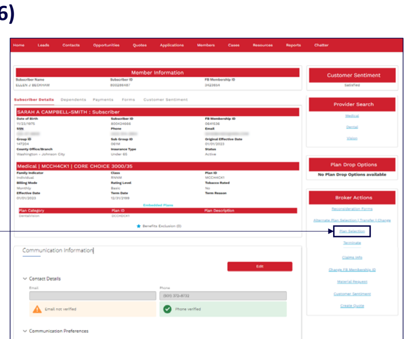
Member 360° View (2 of 6)

Subscriber Details:
- Shows Subscriber info such as subscriber name, DOB, SSN, etc.
- Can also view medical, dental, or vision plans that the member currently has (*any rider or benefits exclusions are shown here*)
- Members also have access to communication details and preferences (see slide)
- Bank Information
- Under Broker Actions: Plan Selection link available on U65 Members

Dependents:
- Dependent's info



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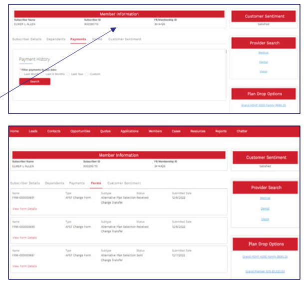
Member 360° View (3 of 6)

Payments:
- Can see process payment
- Payment history of member
  - → Filter by last month, 6 months, last year, and custom date range

Forms:
- Any forms that broker uploaded on behalf of members
- Can view form details such as ref #, Type, Sub-Type, Status and Submitted dates

Customer Sentiments:
- **Satisfied/Dissatisfied**



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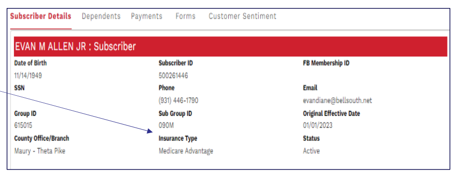
Member 360° View (4 of 6)

Insurance type has been added for they type of plans on a member's profile



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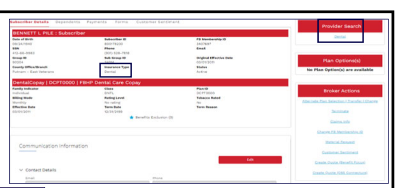
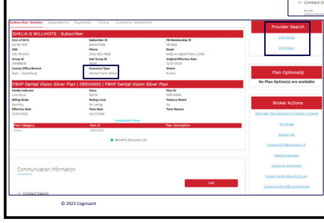
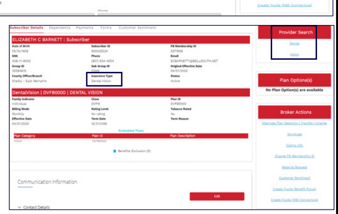
Member 360° View (5 of 6)

If the Insurance type is Dental or Dental Vision or Dental Vision Silver, then based on that the Provider Search options are updated accordingly







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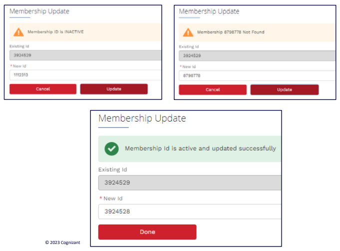
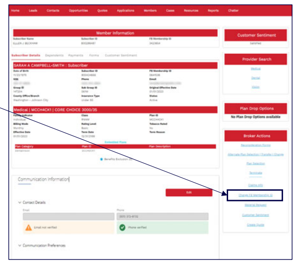
Member 360⁰ View (6 of 6)

Change Membership ID: FB Membership id can be updated from the broker action provided in M360





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Member – Communication Preference Update

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Member – Communication Preference Update

FBHP Broker

Applicable Roles:
- *State Health Plan Manager*
- *Non-TN Sales Agent*

- **Member Communication Preference** can be viewed and updated on the Subscriber information view of "**Member 360⁰**" page
- Email, Marketing material, phone and text preferences can be updated using this capability.

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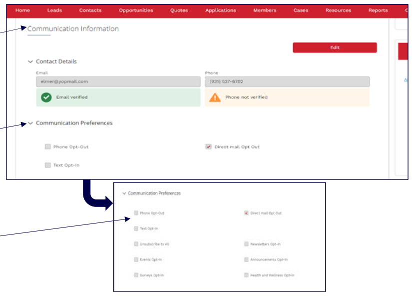
Member – Communication Preference Update

Within the Member 360° window, search for the member to update member communication preference

Scroll down to Communication Information → Communication Preferences

You can select to set the communication preference for
- Text Opt-Out
- Phone Opt-Out
- Direct mail Opt-Out and
- Marketing Materials Opt-Out



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Email/Phone/Address Update

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Email/Phone/Address Update

FBHP Broker

Applicable Roles:
- *Non-TN Sales Agent*
- *State Health Plan Manager*

- Member's contact information like **Email/Phone/Address** can be viewed and updated on the Subscriber information view of "**Member 360°**" page

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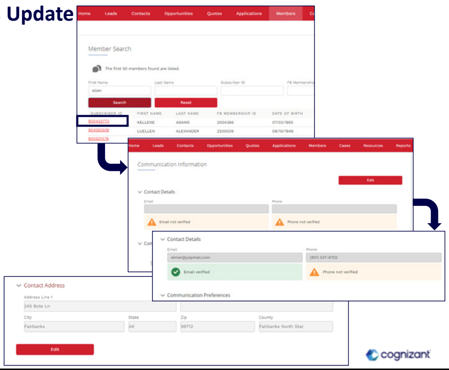
Email/Phone/Address Update

Within the Member 360 window, search for the member to update email/phone/address

Once you click on the hyperlinked subscriber ID → detail page launches → Scroll down to **Communication Information** → Click **Edit** to update contact details

Scroll down to Contact Address → Click **Edit** to update the contact address → You can select **Validate Premium Change** if applicable



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Plan Information Details & Benefit Exclusion

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Plan Information Details & Benefit Exclusion

FBHP Broker

Applicable Roles:
- *Non-TN Sales Agent*
- *State Health Plan Manager*

- **Plan Information Detail and Benefit Exclusion page** show the summary of member plan information such as Plan Name, Family Indicator, Class, Tobacco rated, Plan ID, Rating Level, Billing Mode and any Benefits Exclusion or riders' information.
- This page contain a snapshot **summary of plan information and benefit exclusion**.

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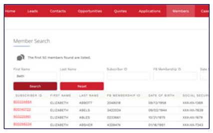
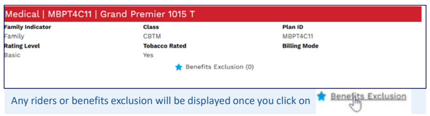
Plan Information Details & Benefit Exclusion

Within the Member 360 window, search for the member to view subscriber details



The heading displays the plan type, plan ID, plan name

Under the heading, a high-level plan information is display:
- Family indicator
- Class
- Plan ID
- Rating Level
- Tobacco Rated
- Billing Mode



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Dependent Information

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Dependent Information

FBHP Broker

Applicable Roles:
- *Non-TN Sales Agent*
- *State Health Plan Manager*

- **Dependent information** enables a Broker to view and update dependent information for a Member
- **Dependent information** can be accessed via the Dependent tab of "**Member 360°**" page

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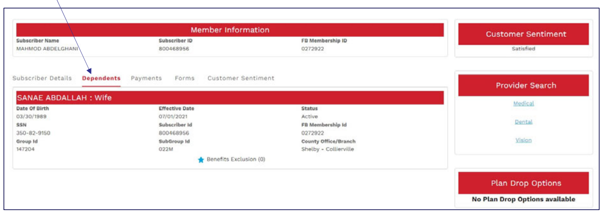
Dependent Information

Click on the "Dependents" tab, and a list of all the dependents (with member information) will appear



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Provider Search

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Provider Search

FBHP Broker

Applicable Roles:
- *Non-TN Sales Agent*
- *State Health Plan Manager*

- **Provider Search** enables a Broker to search for Doctors, Specialists or Hospitals
- There are three types of Provider Searches available on Broker Portal (each linked to an external site)
  - Medical - UMR
  - Dental - DELTADENTAL
  - Vision - VSP

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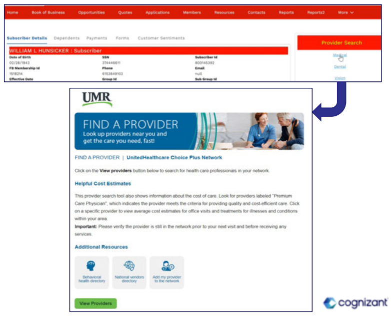
Provider Search (1 of 2)

Within Member 360°, click on the plan type (Medical, Dental, Vision) on the righthand side

"Medical" will take you to the UMR site (an external website) to search for providers



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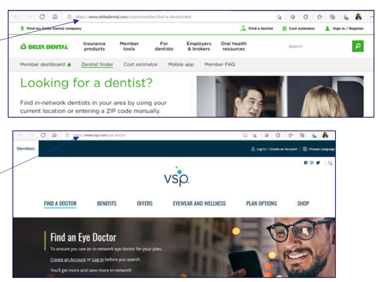
Provider Search (2 of 2)

"Dental" will take you to the DeltaDental site (an external website) to search for a dentist

"Vision" will take you to the VSP site (an external website) to search for an eye doctor.



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Claims Information

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Claims Information

FBHP Broker

Applicable Roles:
- *Non-TN Sales Agent*
- *State Health Plan Manager*

- When member request claims information, Brokers can use this capability to share claims information via email

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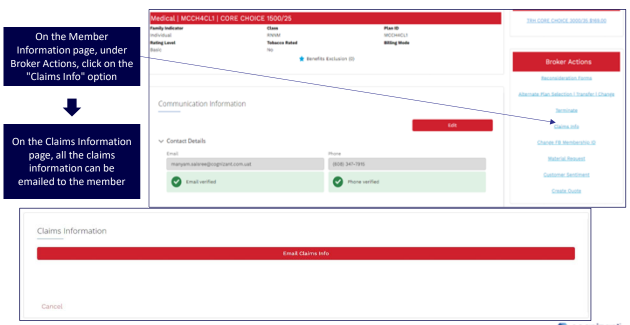
Claims Information

On the Member Information page, under Broker Actions, click on the "Claims Info" option

On the Claims Information page, all the claims information can be emailed to the member



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Plan Drop Options

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Plan Drop Options

FBHP Broker

Applicable Roles:
- *Non-TN Sales Agent*
- *State Health Plan Manager*

- When member requests to drop to a plan with lesser benefits, broker can access the plan drop options available
- Broker can select one of the options and proceed with plan movement

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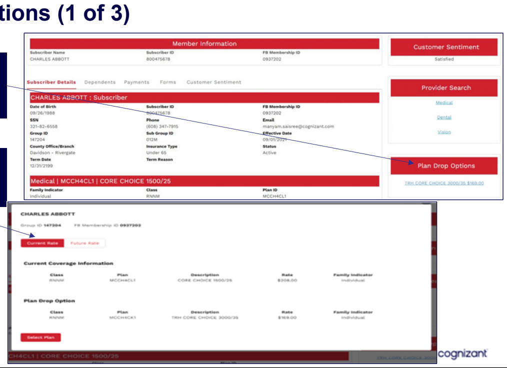
Plan Drop Options (1 of 3)

On the Member Information page, only eligible plans will show in Plan Drop Option section

Once selected, the Current and Future rates along with the Plan Drop rates will be shown



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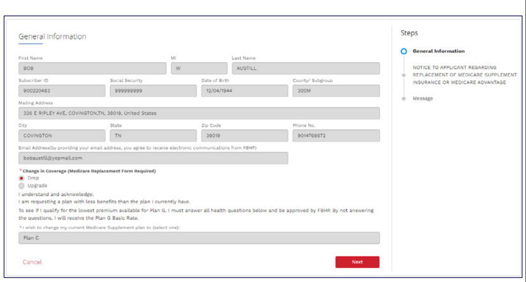
Plan Drop Options (2 of 3)

On selection of a particular plan for Plan Drop, enter General details and the notice for the subscribers



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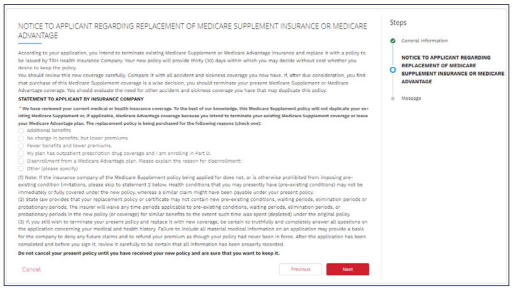
Plan Drop Options (1 of 3)

The notice for the subscribers gives information about the replacement of Medicare Supplement Insurance or Medicare Advantage


NOTICE TO APPLICANT REGARDING REPLACEMENT OF MEDICARE SUPPLEMENT INSURANCE OR MEDICARE ADVANTAGE

According to your application, you intend to terminate existing Medicare Supplement or Medicare Advantage insurance and replace it with a policy to be issued by TRH Health Insurance Company. Your new policy will provide thirty (30) days within which you may decide without cost whether you desire to keep the policy.

You should review this new coverage carefully. Compare it with all accident and sickness coverage you now have. If, after due consideration, you find that purchase of this Medicare Supplement coverage is a wise decision, you should terminate your present Medicare Supplement or Medicare Advantage coverage. You should evaluate the need for other accident and sickness coverage you have that may duplicate this policy.

STATEMENT TO APPLICANT BY INSURANCE COMPANY

*** We have reviewed your current medical or health insurance coverage. To the best of our knowledge, this Medicare Supplement policy will not duplicate your existing Medicare Supplement or, if applicable, Medicare Advantage coverage because you intend to terminate your existing Medicare Supplement coverage or leave your Medicare Advantage plan. The replacement policy is being purchased for the following reasons (check one):**

- Additional benefits
- No change in benefits, but lower premiums
- Fewer benefits and lower premiums.
- My plan has outpatient prescription drug coverage and I am enrolling in Part D.
- Disenrollment from a Medicare Advantage plan. Please explain the reason for disenrollment:
- Other (please specify)

(1) Note: If the insurance company of the Medicare Supplement policy being applied for does not, or is otherwise prohibited from imposing pre-existing condition limitations, please skip to statement 2 below. Health conditions that you may presently have (pre-existing conditions) may not be immediately or fully covered under the new policy, whereas a similar claim might have been payable under your present policy.

(2) State law provides that your replacement policy or certificate may not contain new pre-existing conditions, waiting periods, elimination periods or probationary periods. The insurer will waive any time periods applicable to pre-existing conditions, waiting periods, elimination periods, or probationary periods in the new policy (or coverage) for similar benefits to the extent such time was spent (depleted) under the original policy.

(3) If, you still wish to terminate your present policy and replace it with new coverage, be certain to truthfully and completely answer all questions on the application concerning your medical and health history. Failure to include all material medical information on an application may provide a basis for the company to deny any future claims and to refund your premium as though your policy had never been in force. After the application has been completed and before you sign it, review it carefully to be certain that all information has been properly recorded.

Do not cancel your present policy until you have received your new policy and are sure that you want to keep it.

Cancel | Previous | Next

Steps
- General information
- NOTICE TO APPLICANT REGARDING REPLACEMENT OF MEDICARE SUPPLEMENT INSURANCE OR MEDICARE ADVANTAGE
- Message

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Payment Management

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Payment Management

FBHP Broker

Applicable Roles:
- *Non-TN Sales Agent*
- *State Health Plan Manager*

- Payment History is accessible on the Member360 page under Payments Tab
- Payments cannot be rendered by the Agents/Brokers (cash, check, credit card)
- The only form of payment allowed by Agent/Broker is Bank Transfer
- Payments are now allowed for members of O65 MedSupp and All Dental Plans- O65 MedSupp, U65 Medical and O65/U65 All Dental Related Plans

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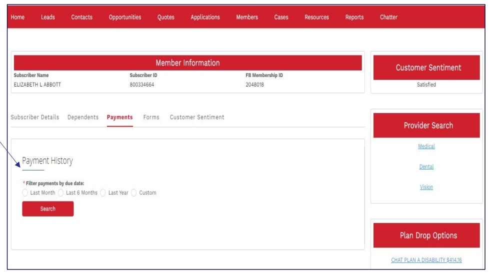
Making Payments & Payment History

Click on the Member link which will show all the member related information

On the Payments tab, payment history can be seen as per the duration requirement



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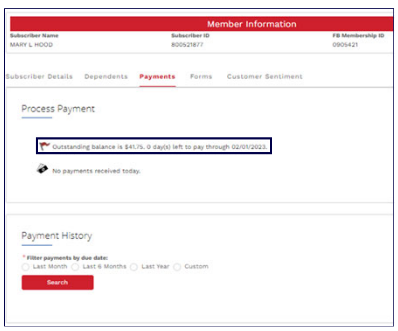
Outstanding Balance

Click on the Members link which will show all the member related information

On the Payments tab, Process Payment and Payment History can be seen as per the duration requirement

Under the Process Payment section, Outstanding balance can be seen



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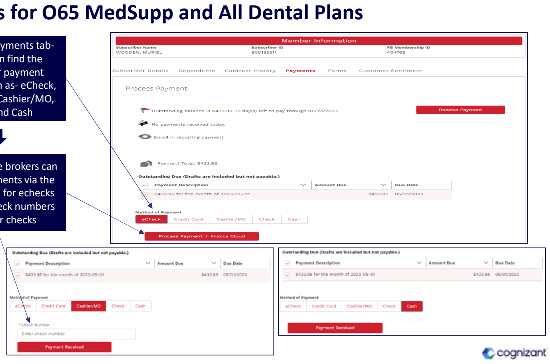
Payments for O65 MedSupp and All Dental Plans

Under the Payments tab- brokers can find the options for payment methods such as- eCheck, Credit Card, Cashier/MO, Check and Cash

Under this the brokers can process payments via the Invoice cloud for echecks and using check numbers for MO or checks



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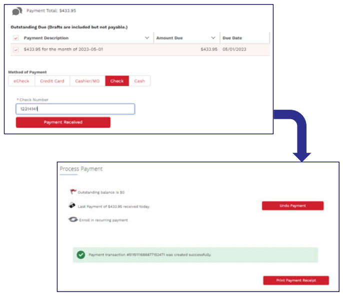
Receive Payments: Payments for O65 MedSupp and All Dental Plans

Once submitted the transaction id is captured and shown via a message on the payment screen



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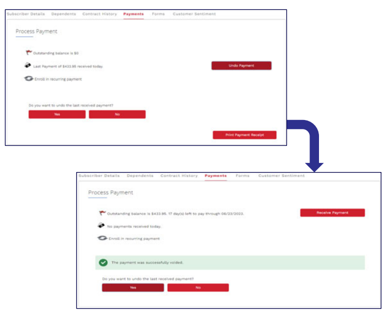
Void Payment: Payments for O65 MedSupp and All Dental Plans

The broker can void a payment if required by undoing the latest received payment



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Transfer Plan

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Transfer Plan

FBHP Broker

Applicable Roles:
- *Non-TN Sales Agent*
- *State Health Plan Manager*

- Transfer Plan allows users to switch plans, plan deductible, and bank information if appropriate
- Broker may need to validate member's bank information if there is a change during the transfer of plan

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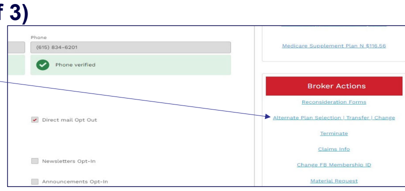
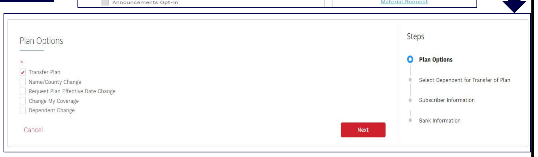
Transfer Plan (1 of 3)

In Member 360⁰ Member Information page, click on "Alternate Plan Selection/Transfer/Change" option under Broker Actions

5 Plan options will be shown: select "Transfer Plan" and click on "Next"





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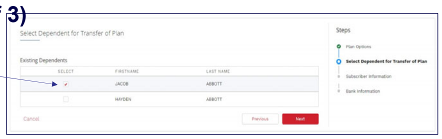
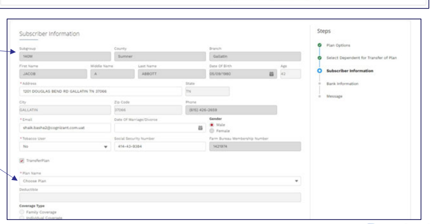
Transfer Plan (2 of 3)

Select the dependents from the list shown and click on "Next"

Transfer Plan will automatically populate fields such as Subgroup, first name, last name etc.

Select appropriate transfer Plan and enter **Plan name and Deductible →** Click Next





108


Transfer Plan (3 of 3)
Populate Bank information → Click Next
• Authorization type
• Account Type
• Requested Date of Change
• Name/Address of Financial Institution
• Routing/Account #
Bank Information
Check this box if the Primary Name on Bank Account is not the same as the Primary Applicant for Coverage
Primary Name on Bank Account
JACOB A ABBOTT
* Authorization Type
Existing Subscriber
New Applicant
* Account Type
Checking Account
Savings Account
* Name of the Financial Institution
Citi Bank
* Address of the Financial Institution
TN
* Routing Number
123456789
* Account Number
1212121212
Cancel
Previous
Next
Steps
Plan Options
Select Dependent for Transfer of Plan
Subscriber Information
Bank Information
Message
Once complete email will send to the Farm Bureau for re-consideration for the Transfer Plan
Message
Email sent successfully
Done
Cancel
Steps
Plan Options
Subscriber Information
Bank Information
Message
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Name/County Change
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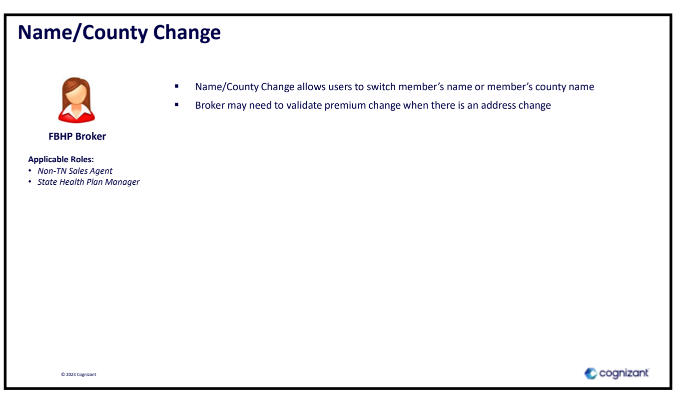
Name/County Change
FBHP Broker
Applicable Roles:
• Non-TN Sales Agent
• State Health Plan Manager
▪ Name/County Change allows users to switch member's name or member's county name
▪ Broker may need to validate premium change when there is an address change
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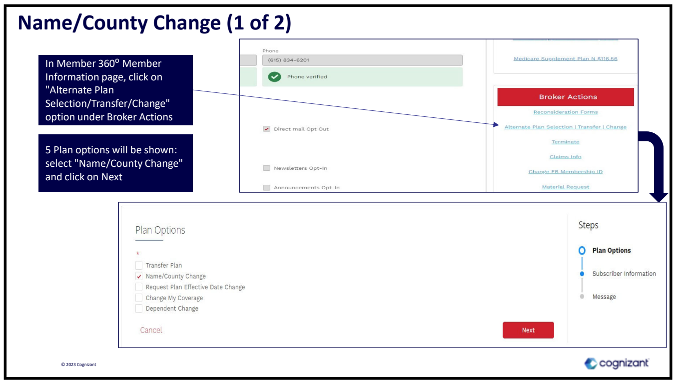
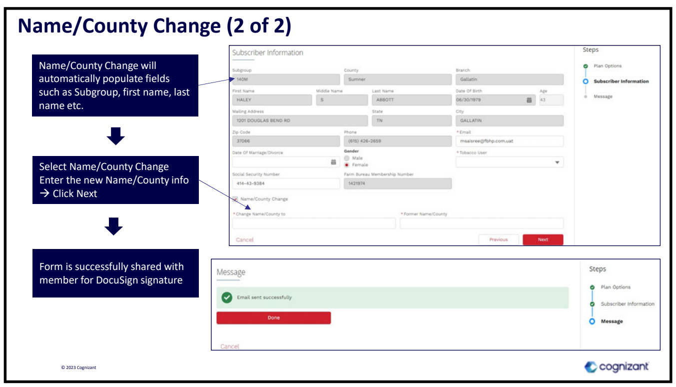
111


Name/County Change (1 of 2)
In Member 360° Member Information page, click on "Alternate Plan Selection/Transfer/Change" option under Broker Actions
5 Plan options will be shown: select "Name/County Change" and click on Next
Broker Actions
Plan Options
Transfer Plan
Name/County Change
Request Plan Effective Date Change
Change My Coverage
Dependent Change
Cancel
Next
Steps
Plan Options
Subscriber Information
Message
cognizant

112


Name/County Change (2 of 2)
Name/County Change will automatically populate fields such as Subgroup, first name, last name etc.
Select Name/County Change Enter the new Name/County info → Click Next
Form is successfully shared with member for DocuSign signature
Subscriber Information
Steps
Message
Steps
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Request Plan Effective Date Change
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Request Plan Effective Date Change

FBHP Broker

Applicable Roles:
- *Non-TN Sales Agent*
- *State Health Plan Manager*

- The plan effective date is the date in which a health insurance provider will begin offering coverage to a member
- Plan effective dates may need to change if a coverage has lapsed, needs to be backdated, or any host of reasons
- Ineffective plan dates will have impact on billing due to lapses in coverage

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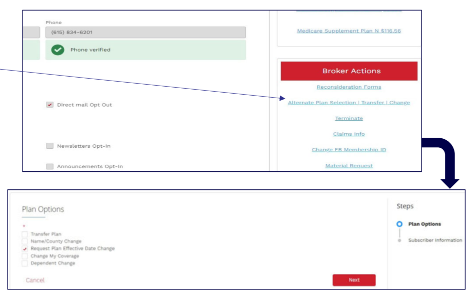
Request Plan Effect Date Change (1 of 2)

In Member 360° Member Information page, click on "Alternate Plan Selection/Transfer/Change" option under Broker Actions

5 Plan Options Form display → Select "Request Plan Effective Date Change"



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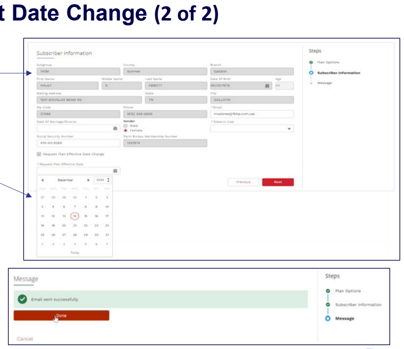
Request Plan Effect Date Change (2 of 2)

Request Plan Effect Date Change will automatically populate fields such as Subgroup, first name, last name etc.

Select the date for Request Plan Effective Date → Click Next

Form is successfully submitted, and validation email will be sent



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Change my Coverage

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Change my Coverage

FBHP Broker

Applicable Roles:
- *Non-TN Sales Agent*
- *State Health Plan Manager*

- Changing insurance coverage is a common practice among health insurance members due to reasons such as: changes in yearly coverage, job/benefit change, dependents moving off guarantor plans
- Health insurance coverage will need to be valid and updated in order to accurately bill a member

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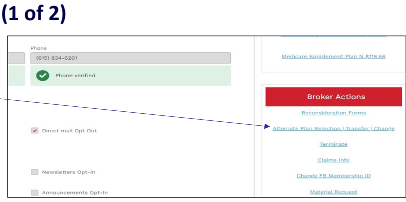
Change my Coverage (1 of 2)

In Member 360° Member Information page, click on "Alternate Plan Selection/Transfer/Change" option under Broker Actions



5 Plan Options Form display → Select "Change my Coverage"

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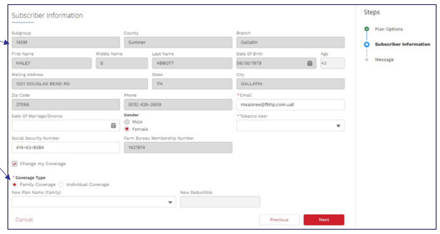
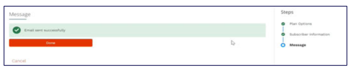
Change my Coverage (2 of 2)

Change my coverage will automatically populate fields such as Subgroup, first name, last name etc.

Select the new plan name and new plan deductible.

Form is successfully submitted, and validation email will be sent





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Reconsideration Review of Rate

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Reconsideration Review of Rate

FBHP Broker

Applicable Roles:
- *Non-TN Sales Agent*
- *State Health Plan Manager*

- **Reconsideration review of rate** allows members to fill out the appropriate forms to ask their insurer to look at updated medical records and medical exam results to lower your rate
- Insurers typically will go through underwriting for a medical examine in order to prove updates in health warrant a reduction in rate

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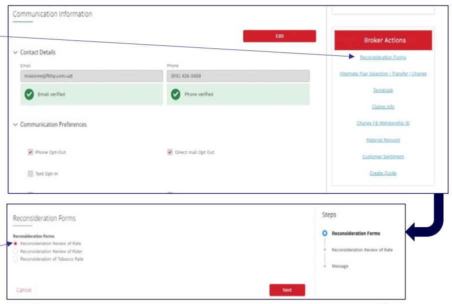
Reconsideration Review of Rate (1 of 2)

In Member 360° Member Information page, click on "Reconsideration Form" on the right-hand side.

You have 3 reconsideration form options:

1. Reconsideration Review of Rate
2. Reconsideration Review of Rider
3. Reconsideration of Tobacco Rate

Select Reconsideration Review of Rate → Click Next



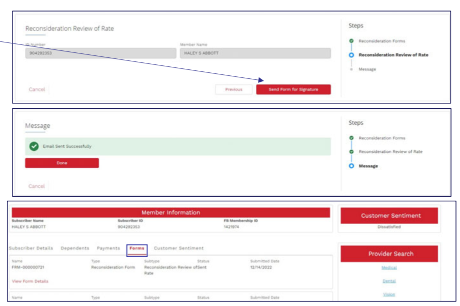
124

Reconsideration Review of Rate (2 of 2)

Reconsideration Review of Rate will automatically populate ID number and Member Name → Click "Send Form for signature"

→ Email will send to the subscriber → Subscriber will fill out the forms and send it back

This will be visible in Forms tab in the member 360°



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Reconsideration Review of Rider

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Reconsideration Review of Rider

FBHP Broker

Applicable Roles:
- *Non-TN Sales Agent*
- *State Health Plan Manager*

- A **rider** is an amendment to an insurance policy. Some riders add coverage (for example, if you buy a maternity rider to add coverage for pregnancy to your policy). In most states, an exclusionary rider is an amendment permitted in individual health insurance policies that permanently excludes coverage for a health condition, body part, or body system.

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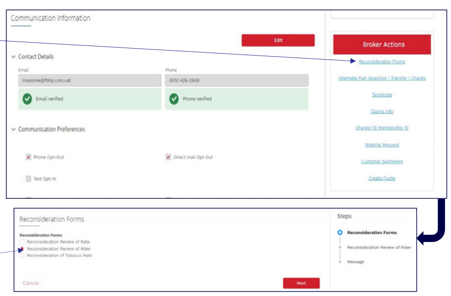
Reconsideration Review of Rider (1 of 2)

In Member 360° Member Summary page, click on "Reconsideration Form" on the left-hand side.

You have 3 reconsideration form options:
1. Reconsideration Review of Rate
2. Reconsideration Review of Rider
3. Reconsideration of Tobacco Rate

Select Reconsideration of Rider → Click Next



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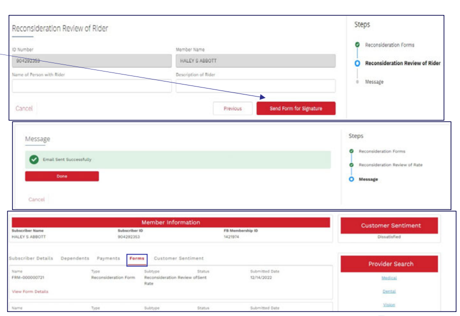
Reconsideration Review of Rider (2 of 2)

Reconsideration Review of Rider will automatically populate ID number and Member Name →Fill in Name of person with Rider & Description of Rider

→ Email will send to the subscriber → Subscriber will fill out the forms and send it back

This will be visible in Forms tab in the member 360° subscriber page



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Reconsideration of Tobacco Rate

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Reconsideration of Tobacco Rate

FBHP Broker

Applicable Roles:
- *Non-TN Sales Agent*
- *State Health Plan Manager*

- **Reconsideration of Tobacco Rate** allows former tobacco users to request a review of their rate due to their cessation of smoking.

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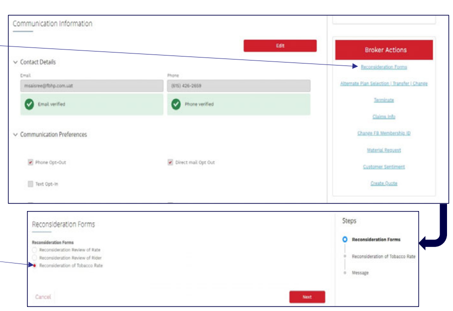
Reconsideration of Tobacco Rate (1 of 2)

In Member 360º Member Summary page, click on "Reconsideration Form" on the left-hand side.

You have 3 reconsideration form options:
1. Reconsideration Review of Rate
2. Reconsideration Review of Rider
3. Reconsideration of Tobacco Rate

Select Reconsideration of Tobacco Rate → Click Next



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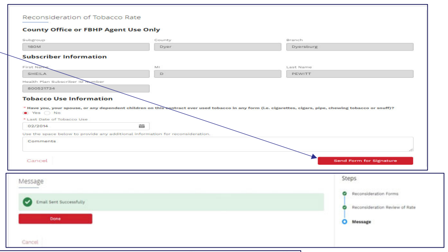
Reconsideration of Tobacco Rate (2 of 2)

Reconsideration of Tobacco Rate will automatically populate those 7 fields regarding subscriber → Verify info and **click send form for signature**.

→ Email will send to the subscriber → Subscriber will fill out the forms and send it back

This will be visible in **Forms** tab in the member 360° subscriber page



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Dependent Change (Add/Delete)

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Dependent Change (Add/Delete)

FBHP Broker

Applicable Roles:
- *Non-TN Sales Agent*
- *State Health Plan Manager*

- Dependent Change is a common practice due to dependents moving off guarantor plans, changing of dependent's plan, or add/delete new/existing dependents from guarantor plans
- Dependent changes in the Broker Portal allows users to submit alternative plan selection form
- Users can either change coverage of dependents or add/delete dependents

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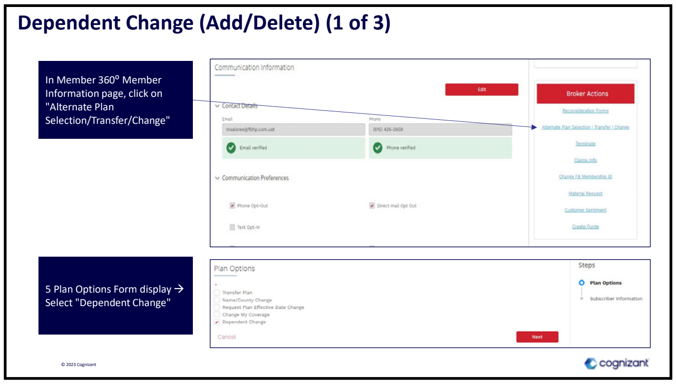
Dependent Change (Add/Delete) (1 of 3)
In Member 360° Member Information page, click on "Alternate Plan Selection/Transfer/Change"
5 Plan Options Form display → Select "Dependent Change"
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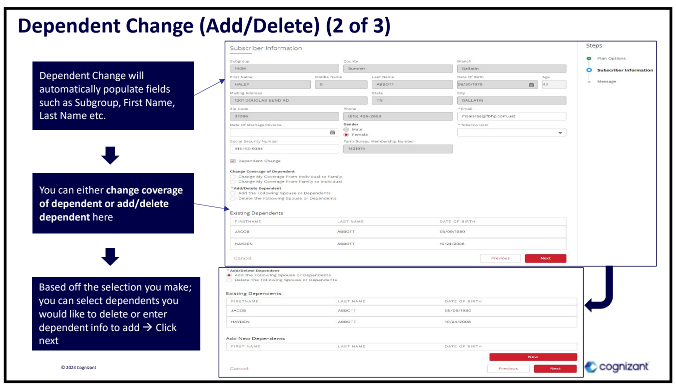
Dependent Change (Add/Delete) (2 of 3)
Dependent Change will automatically populate fields such as Subgroup, First Name, Last Name etc.
You can either change coverage of dependent or add/delete dependent here
Based off the selection you make; you can select dependents you would like to delete or enter dependent info to add → Click next
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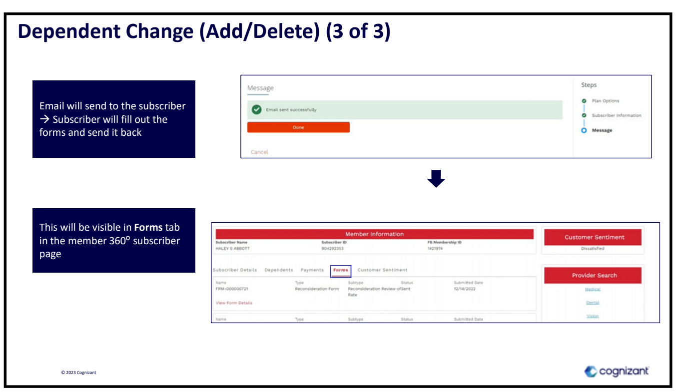
Dependent Change (Add/Delete) (3 of 3)
Email will send to the subscriber → Subscriber will fill out the forms and send it back
This will be visible in Forms tab in the member 360° subscriber page
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Terminate

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Terminate

FBHP Broker

Applicable Roles:
- *Non-TN Sales Agent*
- *State Health Plan Manager*

- Terminate functionality allows users to cancel coverage either due to non-death or death related reasons
- When canceling due to non-death reasons, users will be required to select date for effective date of cancellation
- When canceling due to death reasons, users will be required to fill out the subscriber's deceased dates and executor's information.

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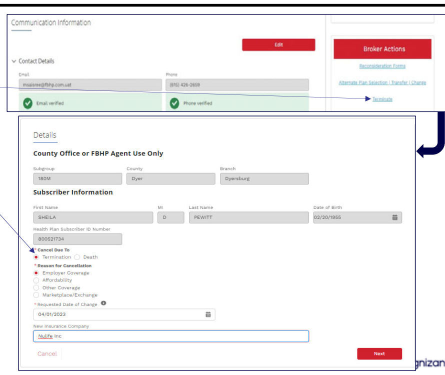
Terminate (1 of 2)

In Member 360° Member Summary page, click on "Terminate"

You can either choose "Cancel due to ***termination or death***"

When canceling due to non-death termination, you will be prompted to select date for "Effective Date of Cancellation"

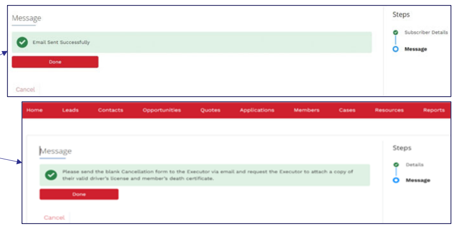


141

Terminate (2 of 2)

When canceling due to termination, you will be shown an "Email Sent Successfully"

When canceling due to death, you will be shown this message



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Reports/Dashboard

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Reports/Dashboards

FBHP Broker

Applicable Roles:
- *Non-TN Sales Agent*
- *State Health Plan Manager*

- A **report** is a list of records that meet the criteria you define, and brokers can view reports that the FBHP Admin create
- Brokers can also create reports of their own
- Brokers can view **dashboards** on Home page of the Broker portal
- The relationship between a dashboard and report is 1:1; for each dashboard component, there is a single underlying report

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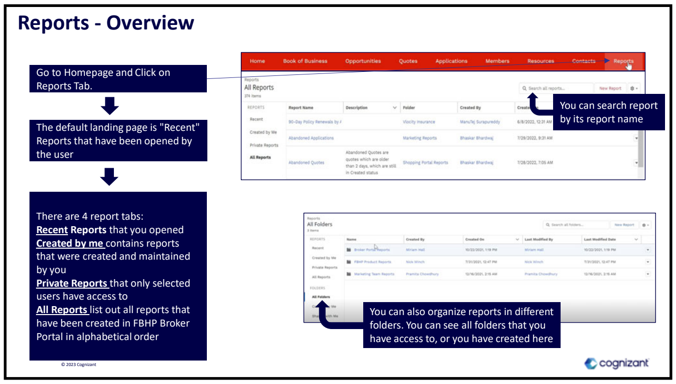
Reports - Overview
Go to Homepage and Click on Reports Tab.
The default landing page is "Recent" Reports that have been opened by the user
There are 4 report tabs:
Recent Reports that you opened
Created by me contains reports that were created and maintained by you
Private Reports that only selected users have access to
All Reports list out all reports that have been created in FBHP Broker Portal in alphabetical order
You can search report by its report name
You can also organize reports in different folders. You can see all folders that you have access to, or you have created here
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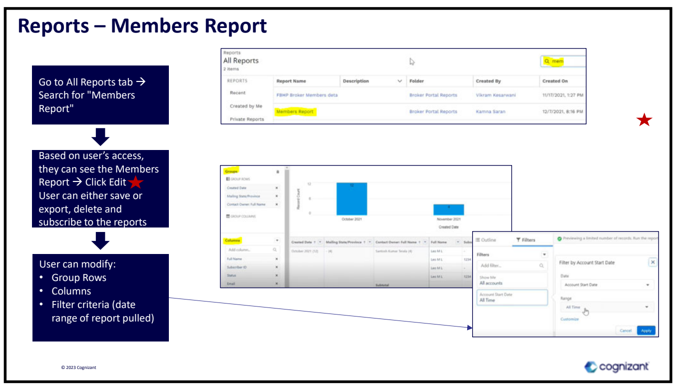
Reports – Members Report
Go to All Reports tab → Search for "Members Report"
Based on user's access, they can see the Members Report → Click Edit
User can either save or export, delete and subscribe to the reports
User can modify:
Group Rows
Columns
Filter criteria (date range of report pulled)
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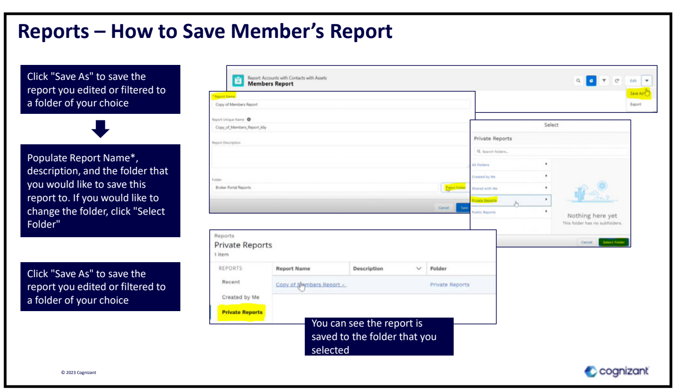
Reports – How to Save Member's Report
Click "Save As" to save the report you edited or filtered to a folder of your choice
Populate Report Name*, description, and the folder that you would like to save this report to. If you would like to change the folder, click "Select Folder"
Click "Save As" to save the report you edited or filtered to a folder of your choice
You can see the report is saved to the folder that you selected
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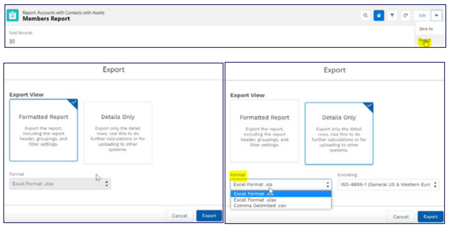
Reports – How to export Member's Report

Click "Export" to extract report from the portal

There are 2 different export view:
- **Formatted Report**: Can only be exported in excel format
- **Details Only**: Can be exported into Excel or CSV file



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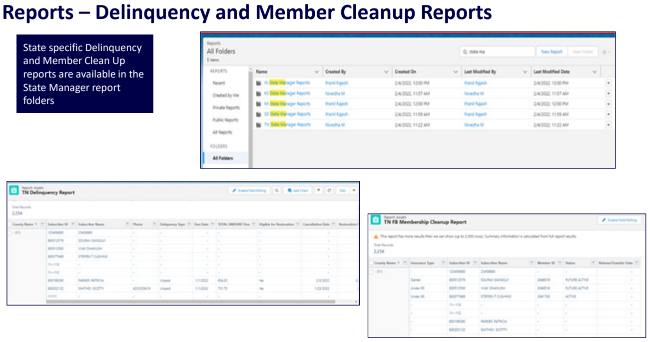
Reports – Delinquency and Member Cleanup Reports

State specific Delinquency and Member Clean Up reports are available in the State Manager report folders



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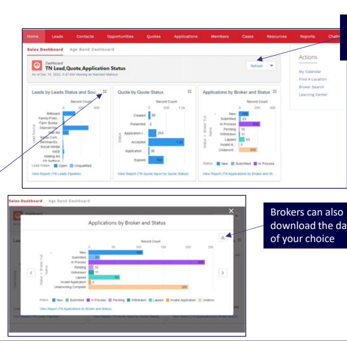
Dashboards

On the Homepage of the Broker Portal, Brokers can access dashboards. Dashboards can inform users of key metrics and trends on various objects

Brokers can expand a particular component of the dashboard

Brokers can refresh to see graphs with latest data

Brokers can also download the dashboard of your choice



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Log a call/task/email

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Log a call/task/email

FBHP Broker

Applicable Roles:
- *Non-TN Sales Agent*
- *State Health Plan Manager*

- Brokers can log a call/create a task/send an email from the Broker Portal
- Allows Brokers manage follow-up/communication with Prospects/Members in an effective manner
- These actions can be initiated from the following:
  - Leads
  - Contacts
  - Accounts (under Activities tab)
  - Opportunities
  - Quotes pages (under Activities tab)

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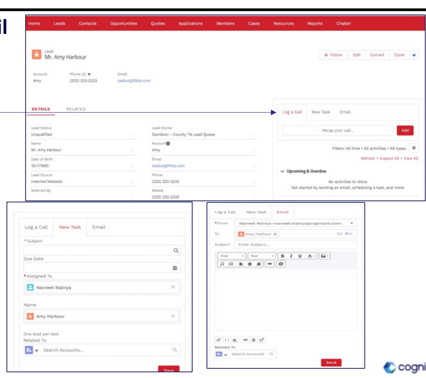
Log a call/task/email

Open any Lead/Opportunity/Application and the functionality will be available on the right side of the page



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Calendar

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Calendar

FBHP Broker

Applicable Roles:
- *Non-TN Sales Agent*
- *State Health Plan Manager*

- Brokers will have access to calendar feature on the Broker portal wherein they can create events and tasks to track them effectively
- The Cvent event requests created by the FBHP Admin and FBHP Marketing users can also be seen on this calendar
- Brokers can share their calendars with other brokers from their own states
- Supervisors can also add calendars of their team members to their calendar

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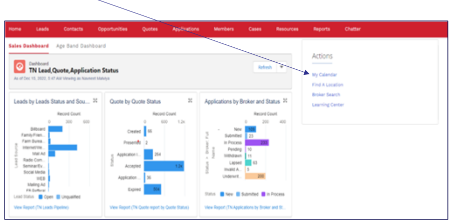
Calendar (1 of 4)

Go to Home page of Broker portal and click on "My Calendar" in the Actions section



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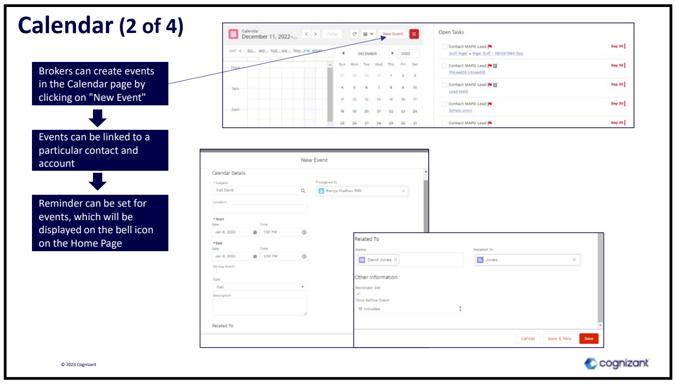
Calendar (2 of 4)
Brokers can create events in the Calendar page by clicking on "New Event"
Events can be linked to a particular contact and account
Reminder can be set for events, which will be displayed on the bell icon on the Home Page
Open Tasks
New Event
Related To
Other Information
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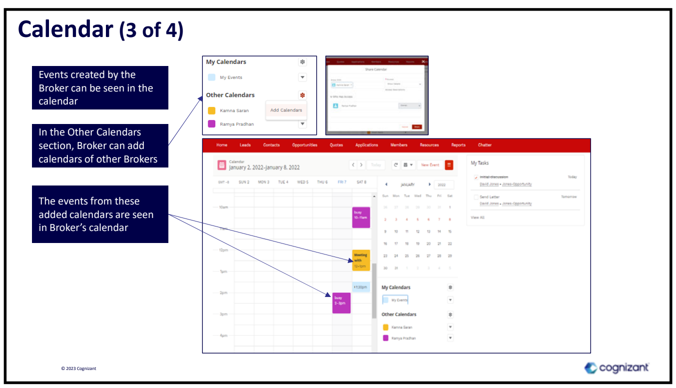
Calendar (3 of 4)
Events created by the Broker can be seen in the calendar
In the Other Calendars section, Broker can add calendars of other Brokers
The events from these added calendars are seen in Broker's calendar
My Calendars
Other Calendars
My Tasks
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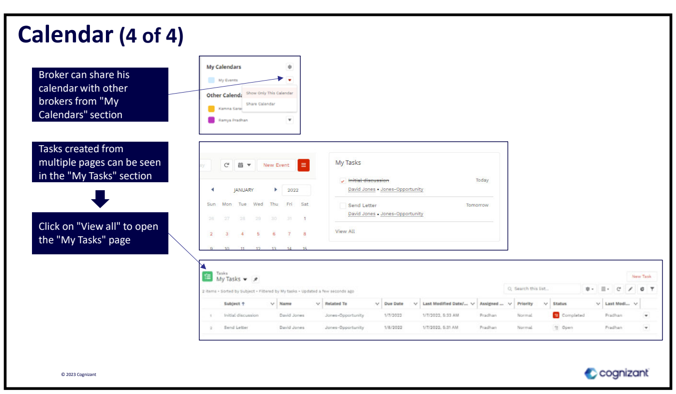
Calendar (4 of 4)
Broker can share his calendar with other brokers from "My Calendars" section
Tasks created from multiple pages can be seen in the "My Tasks" section
Click on "View all" to open the "My Tasks" page
My Calendars
My Tasks
Initial discussion
Send Letter
View All
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Alerts

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Alerts

FBHP Broker

Applicable Roles:
- *Non-TN Sales Agent*
- *State Health Plan Manager*

- A pop-up alert displays important information to communicate on important updates and information in the Broker Portal.
- Only the FBHP admin can create the pop-up alerts
- All Broker roles can view these alerts on the Home page when they login to the Broker portal
- There are 3 different alert modes and 4 different alert types in the Broker Portal.

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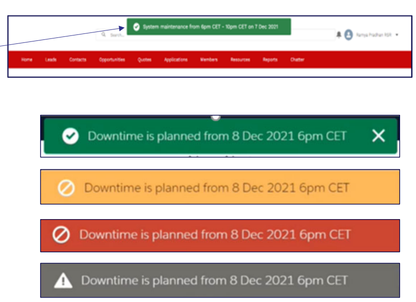
Alerts

When there is a system downtime or update that FBHP Admin would like **to inform users of,** alerts are displayed on the top of the Broker Portal

There are **3** different alert modes:
- **Sticky mode** will remain until the user closes it
- **Pester mode** will only go after a set amount of time
- **Dismissible mode** will go after a set amount of time or when the user closes it manually

There are 4 different alert types:
- Success type
- Warning type
- Error type
- Info type



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Notifications

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Notifications

FBHP Broker

Applicable Roles:
- *Non-TN Sales Agent*
- *State Health Plan Manager*

- Brokers can view notifications on the Bell icon on the Broker portal
- Notifications are received for:
  - Reminders for events, tasks
  - When someone shares a calendar with the broker
  - Application status change
- Broker Portal automatically sends notification emails to prospects and members in various scenarios:
  - Weekly reminders for quotes and applications
  - Application status change
  - Quote expiration

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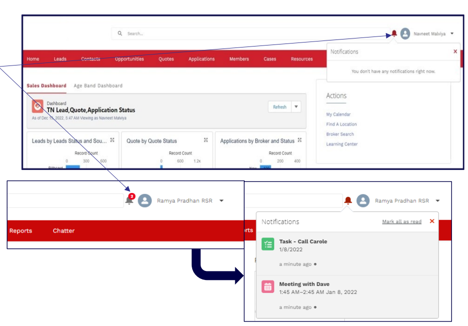
Notifications

Brokers can view notifications on the bell icon on the Broker Portal

Brokers can navigate to respective page from the Notifications



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Chatter

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Chatter

FBHP Broker

Applicable Roles:
- *Non-TN Sales Agent*
- *State Health Plan Manager*

- With Chatter groups, users can communicate and share information
- Brokers can be part of multiple Chatter groups
- Brokers cannot post on Chatter but view posts by FBHP Admin and like/comment on posts

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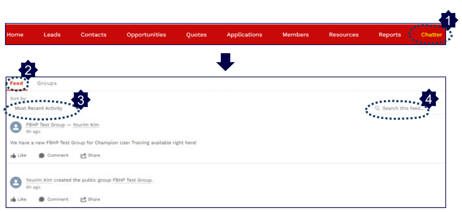
Chatter - Feed

1. In the FBHP Broker Portal navigation tool bar, select **Chatter** to access the communication tool

2. Within the **Feed** tab, you can see most recent posts by you or others in the group

3. You can Sort by **"Most Recent Activity"** or **"Latest Post"**

4. You can also search the feed by typing **key words**



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Resources

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Resources

FBHP Broker

Applicable Roles:
- *Non-TN Sales Agent*
- *State Health Plan Manager*

- Brokers can view resources on the Broker portal
- Broker can download the files in the folders in resources page

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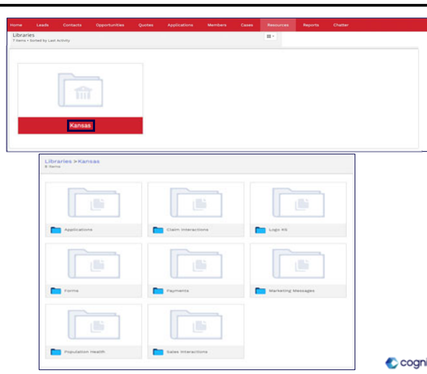
Resources

Resources page will have multiple library folders including the State Specific files

Every folder can be viewed in Tile or Table format and download the files in the folder



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Global Search

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Global Search

FBHP Broker

Applicable Roles:
- *Non-TN Sales Agent*
- *State Health Plan Manager*

- The Global Search Component lets users search for any object available to them in Broker Portal
- Autocomplete search results are based on the most recently searched or used objects and records by the user

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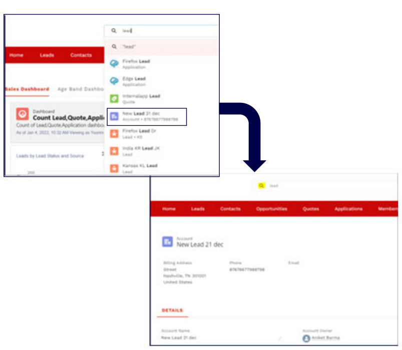
Global Search

Click on the search bar on top to search for any object

Auto-complete search results are based on user's recent search

Click on the desired object or record to complete search



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