



## B r o k e r P o r t a l

### **Ebix/HealthConnect Broker Portal**

The Ebix/HealthConnect Broker Portal is an online system that easily allows for quoting multiple carriers and an assortment of plans in a quick and efficient manner. The system is a state of the art tool that allows brokers to work from the office or field and dramatically reduce quoting and perusal time for each client. This intuitive system is adopted regardless of previous computer skills. The Ebix/HealthConnect Broker Portal is secure, reliable, and accurate so brokers know they can have the utmost confidence in information to present in the field. In addition to the quoting module, brokers can access physician and network information, forms, HR functions and other important tools to help them run their business.

Ebix/HealthConnect Broker Portal has countless and significant features:

- Two quoting paths, Plan Wizard and Plan Center
- Easy Census Entry
- The ability to save batches of plans for easy quoting, MyPlans
- Multiple report styles to suit your selling style
- Combining, storing, faxing or emailing directly from the system
- Physician Searches and Network Analysis
- Forms and Documents are easily added
- Intranet site, HRConnect, for brokers to distribute their groups



## Company Input

Ebix/HealthConnect has streamlined loading group information. Fill in blank fields and all relevant group information will be added to the Client Profile and saved. Omitted necessary information will be flagged and the user will be prompted to enter the appropriate information needed to move forward. Ebix/HealthConnect will also pre-populate certain fields as the system recognizes correlated or saved information.

## Automatic Saving

Ebix/HealthConnect automatically saves any and all information as you switch from screen to screen. Never worry about hitting a save button, we do that for you.

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Dashboard Accounts Admin MyAccount Forms Warehouse Physician Locator Rate Status Tasks Help SEP Configuration

Accounts > Add Group > Test Broker

Please enter the necessary information to add a new group.

**General Information**

Name (dba)\*  
Main Street Accounting

Effective Date\*  
11/01/2017

SIC  
6411 Pick From List

**Address Information**

Zip\*  
11716 OR

County  
Suffolk

State  
NY

City  
Bohemia

Fax  
555-555-5556

Email  
accounting@gmail.com

**Census Information**

Census\*  
Singles (EE)  
2

EE-Spouse  
0

EE-Child  
1

EE-Children  
1

Family  
1

Add

\* Indicates required field

## Plan Wizard

Our most commonly used quoting engine allows you to drill down to find specific plans. Filtering begins with the carrier, then plan type, and copay etc. Never worry about building a plan that does not exist, the system will validate the information as you go, and only present legitimate choices for the next filter.

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Dashboard Accounts Admin MyAccount Forms Warehouse Physician Locator Rate Status Tasks Help SEP Configuration

Accounts > Account Summary (Main Street Accounti...) > Test Broker > Run Quote > Plan Wizard

Quote by drilling down within a carriers' plan options

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**Select Plan Criteria**

Carrier	Type	Copay	In-Net Deduct	In-Net Coinsurance	Drug Cards
Aetna	EPOC	20/40 after ded	2700	N/A	10/40/80 IntDed
Aetna - Dependent 30 Plans	HSA	72/50 after ded			
EmblemHealth		50/75 after ded			
Empire Blue Priority		Ded/Cois			

**Quoted Health Plans**

Carrier	Plan Name	Drug Code	Metallic Level	EE	ES	EC	Fam	Total Cost	Type	UCR	Class	Actions
Empire Blue Priority	Silver Blue Priority EPO 2700/0%/4500 w/HSA	10/40/80 IntDed	Silver	\$687	\$1,374	\$1,163	\$1,950	\$7,043	HSA	0	default	
Empire Blue Priority	Silver Blue Priority EPO 2700/0%/4500 w/HSA Dep 29	10/40/80 IntDed	Silver	\$694	\$1,388	\$1,180	\$1,977	\$7,112	HSA	0	default	

**Selected Health Plans**

Carrier	Plan Name	Type	Drug Code	Total Cost	Quote Date	Run By	Class	Eff Date	Actions
Effective 11/01/2017, Zipcode 11716, SIC 6411, 6 enrolling									
Empire Blue Priority	Silver Blue Priority EPO 2700/0%/4500 w/HSA	HSA	10/40/80 IntDed	\$7,043	10/26/2017	hca_amsbroker	default	11/1/2017	
Empire Blue Priority	Silver Blue Priority EPO 2700/0%/4500 w/HSA Dep 29	HSA	10/40/80 IntDed	\$7,112	10/26/2017	hca_amsbroker	default	11/1/2017	

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# Save Your Favorites

MyPlans allows you to save your favorite plans and utilize them with any group in the future. Save by carrier, type, cost, or any preference you might have.

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Dashboard Accounts Admin MyAccount Forms Warehouse Physician Locator Rate Status Tasks Help SEP Configuration

Accounts > Account Summary (Main Street Account...) > Test Broker > Run Quote > Edit List

Manage list information or add/remove plans from the list.

**The selected plans have been added to your list.**

**List Information**

Name: MyPlans List  
State: NY  
Coverage: Health  
Status: Active

Back Update

**Plans That Can Be Added**

Carrier	Plan Name	Type	Drug Code	Total Cost	Quote Date	Run By	Class	Eff Date	Actions
<input checked="" type="checkbox"/>	Empire Blue Priority Gold Blue Priority EPO 1350/0%/3000 w/HSA	HSA	10/40/80 IntDed	\$8,096	10/26/2017	hcs_amsbroker/default	default	11/1/2017	🔍 🗑️
<input type="checkbox"/>	Empire Blue Priority Gold Blue Priority EPO 1350/0%/3000 w/HSA Dep 29	HSA	10/40/80 IntDed	\$8,205	10/26/2017	hcs_amsbroker/default	default	11/1/2017	🔍 🗑️

**Plans in the List**

Carrier	Plan Name	Drug Code	Type	UCR	Plan Exp Date	Actions
<input type="checkbox"/>	Empire Blue Priority Gold Blue Priority EPO 1350/0%/3000 w/HSA	10/40/80 IntDed	HSA	0	12/31/2017	🔍 🗑️

\* indicates required field

# Plan Center

Ebiz/HealthConnect Plan Center allows brokers to take a larger survey of the market and then use post filters to narrow their selection. When you are not sure about a particular carrier or product, Plan Center allows you to browse easily and efficiently.

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Dashboard Accounts Admin MyAccount Forms Warehouse Physician Locator Rate Status Tasks Help SEP Configuration

Accounts > Account Summary (Main Street Account...) > Test Broker > Run Quote > Carrier Selection Page

Please select the carriers to be included in your proposal by double-clicking on the carrier name. Click the checkboxes next to the filter name to check/uncheck all options.

**Choose Medical Carriers**

Available Carriers: Aetna - Dependent 30 Plans, CignaHealth, HealthPass - All, HealthPassCareConnect, HealthPassOscar, HealthPassOnford, Healthy NY

Selected Carriers: Empire Blue Priority, Empire EPO/PPO, Empire Pathway

**Base Plan Items**

☐ Access  
☐ Plan Type  
☐ Copy  
☐ Metal Level  
☐ Deductible  
☐ UCR  
Maximum Monthly

☑️ Callkeeper ☑️ Non-Callkeeper  
☑️ HMO ☑️ PPO ☑️ POS ☑️ VLA ☑️ EPO ☑️ HD ☑️ HSA  
☑️ 0-14 ☑️ 15-34 ☑️ 35-44 ☑️ 45+ ☑️ Child ☑️ Infant  
☑️ Platinum ☑️ Gold ☑️ Silver ☑️ Bronze  
☑️ 0-500 ☑️ 501-1000 ☑️ 1001-2500 ☑️ 2501-4999 ☑️ 5000+  
☑️ 50 ☑️ 70 ☑️ 90 ☑️ 110 ☑️ 140 ☑️ 150

Pre-Set Selections: Carrier: [Dropdown] | Sort Order: [Dropdown] | Sort By: [Dropdown]

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Dashboard Accounts Admin MyAccount Forms Warehouse Physician Locator Rate Status Tasks Help SEP Configuration

Accounts > Account Summary (Main Street Account...) > Test Broker > Run Quote > Plan Selection Page

Please select the plans to be included in your proposal and click "Next".

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**Quoted Health Plans: 6 Plans Found**

All UCR | All Drug Code | All Metallic Level | EPOc

Carrier	Plan Name	Drug Code	Metallic Level	FE	ES	EC	Fam	Total Cost	Type	UCR	Class	Actions
<input type="checkbox"/>	Empire Blue Priority Gold Blue Priority EPO 1250/20%	10/35/75	Gold	\$819	\$1,639	\$1,393	\$2,335	\$8,399	EPOc	0	default	🔍 🗑️
<input type="checkbox"/>	Empire Blue Priority Gold Blue Priority EPO 30/10%/70	10/35/75	Gold	\$823	\$1,645	\$1,399	\$2,345	\$8,433	EPOc	0	default	🔍 🗑️
<input type="checkbox"/>	Empire Blue Priority Silver Blue Priority EPO 1500/30%	15/40/80/2 died T2-3	Silver	\$705	\$1,410	\$1,199	\$2,009	\$7,227	EPOc	0	default	🔍 🗑️
<input type="checkbox"/>	Empire Blue Priority Gold Blue Priority EPO 1250/20% Dep 29	10/35/75	Gold	\$831	\$1,663	\$1,414	\$2,370	\$8,523	EPOc	0	default	🔍 🗑️

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## Updating

Easily update the census or effective date for an existing group, and then update the plans and rates for that group with the click of a button. No re-entry is needed quarter-to-quarter or year-to-year.

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Dashboard Accounts Admin MyAccount Forms Warehouse Physician Locator Rate Status Tasks Help SEP Configuration

Accounts > Account Summary (Main Street Accounti...) > Test Broker > Run Quote > Plan Update

We have generated updated rates for your selected plans. Riders have been automatically added to the new plans. If you want to replace the current plans with the updated plans, check the appropriate boxes, and click 'Update'.

Note: Proposals are not updated by this process. They will have to be manually updated in the Proposal Generator.

Back Update & Continue

Health										UnGroup Plans		Toggle Detail		
										Current		Updated (11/01/2017)		
Accept	Carrier	Plan Name	Drug Code	Class	Benefits	Status	Tier	Total Cost	Total Cost	Tier				
Current Effective 11/01/2017, Zipcode 11716, SIC 6411, 6 enrolling														
>	<input type="checkbox"/>	Empire Blue Priority	Gold Blue Priority EPO 1250/20%/4000	10/05/75	default	Selected	4	\$8,399.46	\$8,399.46	4				
>	<input type="checkbox"/>	Empire Blue Priority	Gold Blue Priority EPO 1250/20%/4000 Dep 29	10/05/75	default	Selected	4	\$8,522.77	\$8,522.77	4				

Back Update & Continue

## Report Generator

Ebiz/HealthConnect Report Generator allows for the easy positioning, sorting, or editing of your selected plans. The copy, edit, and Current Plan feature allows for an easy side by side comparison that includes the Current Plan, the renewal, and any alternative options. Variance is computed in both dollars and percentage and displayed on the final output.

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Dashboard Accounts Admin MyAccount Forms Warehouse Physician Locator Rate Status Tasks Help SEP Configuration

Accounts > Account Summary (Main Street Accounti...) > Test Broker > Run Quote > Review Selected Plans

Use this page to review and sort your health and other plans for inclusion in your proposal. Drag and drop your plans into your preferred report sort order by clicking and holding a plan and placing it to a new position. You can also edit your plans by clicking on the edit icon in the actions column.

Select a grouped sort

Selected Health Plans - 2 Plans Selected

	Carrier	Plan	Type	Drug Code	Premium	Quote Date	Effective Date	Increase (decr)%	Actions	
>	<input checked="" type="checkbox"/>	Empire Blue Priority	Gold Blue Priority EPO 1250/20%/4000	EPOc	10/05/75	\$8,399	10/28/2017	11/1/2017	-	
>	<input checked="" type="checkbox"/>	Empire Blue Priority	Gold Blue Priority EPO 1250/20%/4000 Dep 29	EPOc	10/05/75	\$8,523	10/28/2017	11/1/2017	-	

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## Multiple Reporting Options

Ebix/HealthConnect gives brokers multiple styles of reporting. This allows a broker to tailor their proposal to their selling style and provide differentiation amongst competitors. Choose from dozens of combinations: high level, detailed, color, landscape, portrait, grids, full benefits, physicians, census, etc. Also choose how many plans for each page: 1, 2, 3, 4, or 8.

## Distribution Options

Ebix/HealthConnect provides different methods through which a broker can deliver a proposal to clients: Printing, emailing, and faxing. All can be done with a click of a button from the Proposal Center which acts as a virtual file cabinet for each group.

Name	Type	Date	Actions
NY (10/26/2017 8:29:57 AM)	Plan Report	10/26/2017 08:29 AM	

## Compare Doctors and Networks

Ebix/HealthConnect Network Analysis functionality allows brokers to compare carriers and networks based on a given number of search criteria. Brokers can search and compare on the network or physician level based on name, geography, specialty, language, network, hospital affiliation and more...

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Dashboard Accounts Admin MyAccount Forms Warehouse Physician Locator Rate Status Tasks Help SEP Configuration

Accounts > Account Summary (Main Street Account...) > Test Broker > Network Analysis > Net Compare

Network Comparison: This tool will help your clients understand the differences between several networks

**Step 1. Where are you looking for providers?** [Reset Filters](#)

State: New York County: ANY  
City: ANY Zipcode: Radius: 0 Miles

**Step 2. Tell us about the providers (optional)**

Specialty: Abdominal Surgery, Acupuncture, Addition And Chemical Dep, Addition Medicine, Addition Psychiatry, Adolescent Medicine  
Language: ANY  
Accepts New Patients:   
Hospital: ANY

Use CTRL to select multiple Specialties.

**Step 3. Choose networks to compare**

All networks for:  
Emblem/GHI Dental - Preferred  
Emblem/GHI Dental - Preferred+  
Emblem/GHI Network Access  
Emblem/New York Metro  
Emblem/Select Care HMO  
Healthpass-Oxford Freedom  
Healthpass-Oxford Liberty  
Healthpass-Oxford Metro

Selected networks:  
Empire PPO/EPO

[Compare Networks](#)

## Disruption Analysis

Brokers can enter a list of group specific physicians and perform disruption analysis on available networks. Print lists, cross tabulation reports or physician specific pages are also available.

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Dashboard Accounts Admin MyAccount Forms Warehouse Physician Locator Rate Status Tasks Help SEP Configuration

Accounts > Account Summary (Main Street Account...) > Test Broker > Network Analysis > Physician Disruption

Physician Disruption Analysis: This tool will help your clients understand if their current doctors will be available if the Physician Network is changed.

**Step 1. Where are you looking for providers?** [Reset Filters](#)

State: New York County: Suffolk  
City: Bohemia Zipcode: 11716 Radius: 5 Miles

**Step 2. Tell us about the providers (optional)**

Specialty: Abdominal Surgery  
Last Name: First Name: Provider Type: PCP & Specialist  
Network: ANY Language: Accepts New Patients:

Use CTRL to select multiple Specialties.

**Step 3. Search For Physicians**

[Search](#)

**Step 4. Select Physicians**

From the results below, choose providers to include in the physician network comparison.  
Don't find who you are looking for? Change the search criteria above and search again.

Search Results:

ID	Name	City	County	Actions	
<input checked="" type="checkbox"/>	139249	Altshul, Larry M	Lake Ronkonkoma, NY, 11779	Suffolk	<a href="#">Link</a> <a href="#">Unlink</a>
<input type="checkbox"/>	41405	Arkonac, Burak	Lake Ronkonkoma, NY, 11779	Suffolk	<a href="#">Link</a> <a href="#">Unlink</a>
<input type="checkbox"/>	603801	Asheld, John J	Ronkonkoma, NY, 11779	Suffolk	<a href="#">Link</a> <a href="#">Unlink</a>
<input type="checkbox"/>	603801	Asheld, John J	Lake Ronkonkoma, NY, 11779	Suffolk	<a href="#">Link</a> <a href="#">Unlink</a>
<input type="checkbox"/>	127287	Asheld, Wilbur	Lake Ronkonkoma, NY, 11779	Suffolk	<a href="#">Link</a> <a href="#">Unlink</a>

Selected Physicians:

ID	Name	City	County	Linked	Actions
<input checked="" type="checkbox"/>	139249	Altshul, Larry M	Lake Ronkonkoma, NY, 11779	Suffolk	<a href="#">Link</a> <a href="#">Unlink</a>
<input type="checkbox"/>	41405	Arkonac, Burak	Lake Ronkonkoma, NY, 11779	Suffolk	<a href="#">Link</a> <a href="#">Unlink</a>
<input type="checkbox"/>	603801	Asheld, John J	Ronkonkoma, NY, 11779	Suffolk	<a href="#">Link</a> <a href="#">Unlink</a>
<input type="checkbox"/>	127287	Asheld, Wilbur	Lake Ronkonkoma, NY, 11779	Suffolk	<a href="#">Link</a> <a href="#">Unlink</a>
<input type="checkbox"/>	280658	Bello, John	Lake Ronkonkoma, NY, 11779	Suffolk	<a href="#">Link</a> <a href="#">Unlink</a>

See Duplicates? Check the duplicate physicians and click "Link". Linked physicians will only appear once in reports. Click "Unlink" to remove the association.

Physician Listing Report: [Print](#) [Excel](#)  Include in proposal

**Step 5. Choose which networks to compare.**

Available networks:  
Aetna HMO/POS  
Aetna MC  
Aetna NYC/P  
Aetna PPO  
ComMedicare  
Emblem/GHI  
Emblem/GHI Dental - Preferred  
Emblem/GHI Dental - Preferred+  
Emblem/GHI Network Access  
Emblem/New York Metro  
Emblem/Select Care HMO

Selected networks:

[Compare Networks](#)

## Provider Details

Ebix/HealthConnect provides physician information in just a few clicks whether for quick viewing or extensive reporting purposes. Besides the aforementioned network, hospital and insurance level information, Ebix/HealthConnect also provides addresses, alternate locations and phone numbers.

Address	County	Phone	Specialty
<b>Bello, John</b>			
<b>Aetna HMO/PPOS</b>			
100 Port Washington Blvd, Roslyn, NY 11576	Nassau	(631) 669-2555	Cardiovascular Disease Internal Medicine
1000 Montauk Hwy, West Islip, NY 11795	Suffolk	(631) 669-2555	Cardiovascular Disease Internal Medicine
300 Bay Shore Rd, North Babylon, NY 11703	Suffolk	(631) 596-2700	Cardiovascular Disease Internal Medicine
540 Union Blvd, West Islip, NY 11795	Suffolk	(631) 669-2555	Cardiovascular Disease Internal Medicine
640 Hawkins Ave, Lake Ronkonkoma, NY 11779	Suffolk	(631) 737-0100	Cardiovascular Disease Internal Medicine
<b>Aetna MC</b>			
1000 Montauk Hwy, West Islip, NY 11795	Suffolk	(631) 669-2555	Cardiovascular Disease Internal Medicine
540 Union Blvd, West Islip, NY 11795	Suffolk	(631) 669-2555	Cardiovascular Disease Internal Medicine
640 Hawkins Ave, Lake Ronkonkoma, NY 11779	Suffolk	(631) 737-0100	Cardiovascular Disease Internal Medicine
300 Bay Shore Rd, North Babylon, NY 11703	Suffolk	(631) 596-2700	Cardiovascular Disease Internal Medicine
100 Port Washington Blvd, Roslyn, NY 11576	Nassau	(631) 669-2555	Cardiovascular Disease Internal Medicine
<b>Aetna PPO</b>			
300 Bay Shore Rd, North Babylon, NY 11703	Suffolk	(631) 596-2700	Cardiovascular Disease Internal Medicine
100 Port Washington Blvd, Roslyn, NY 11576	Nassau	(631) 669-2555	Cardiovascular Disease Internal Medicine
1000 Montauk Hwy, West Islip, NY 11795	Suffolk	(631) 669-2555	Cardiovascular Disease Internal Medicine
540 Union Blvd, West Islip, NY 11795	Suffolk	(631) 669-2555	Cardiovascular Disease Internal Medicine
640 Hawkins Ave, Lake Ronkonkoma, NY 11779	Suffolk	(631) 737-0100	Cardiovascular Disease Internal Medicine
<b>Connecticare</b>			
640 Hawkins Ave, Lake Ronkonkoma, NY 11779	Suffolk	(631) 737-0100	Cardiovascular Disease
540 Union Blvd, West Islip, NY 11795	Suffolk	(631) 669-2555	Cardiovascular Disease
300 Bay Shore Rd, North Babylon, NY 11703	Suffolk	(631) 596-2700	Cardiovascular Disease
760 Sunrise Hwy, West Babylon, NY 11704	Suffolk	(631) 242-1181	Cardiovascular Disease
<b>Emblem/GHI</b>			
540 Union Blvd, West Islip, NY 11795	Suffolk	(631) 669-2555	Cardiovascular Disease Internal Medicine
<b>Emblem/GHI Network Access</b>			
540 Union Blvd, West Islip, NY 11795	Suffolk	(631) 669-2555	Cardiovascular Disease Internal Medicine
<b>Empire PPO/EPO</b>			
300 Bay Shore Rd, North Babylon, NY 11703	Suffolk	(631) 596-2700	Cardiovascular Disease Internal Medicine
540 Union Blvd, West Islip, NY 11795	Suffolk	(631) 669-2555	Cardiovascular Disease Internal Medicine

## Attaching Important Documents

Ebix/HealthConnect makes attaching important documents and carrier forms a quick and painless task. Whether you are drawing a form from our library or a carrier's website, it only takes a few clicks to add the form to the group's folder. Complete enrollment kits are available, as is access to the broker's own marketing documents and BOR's.

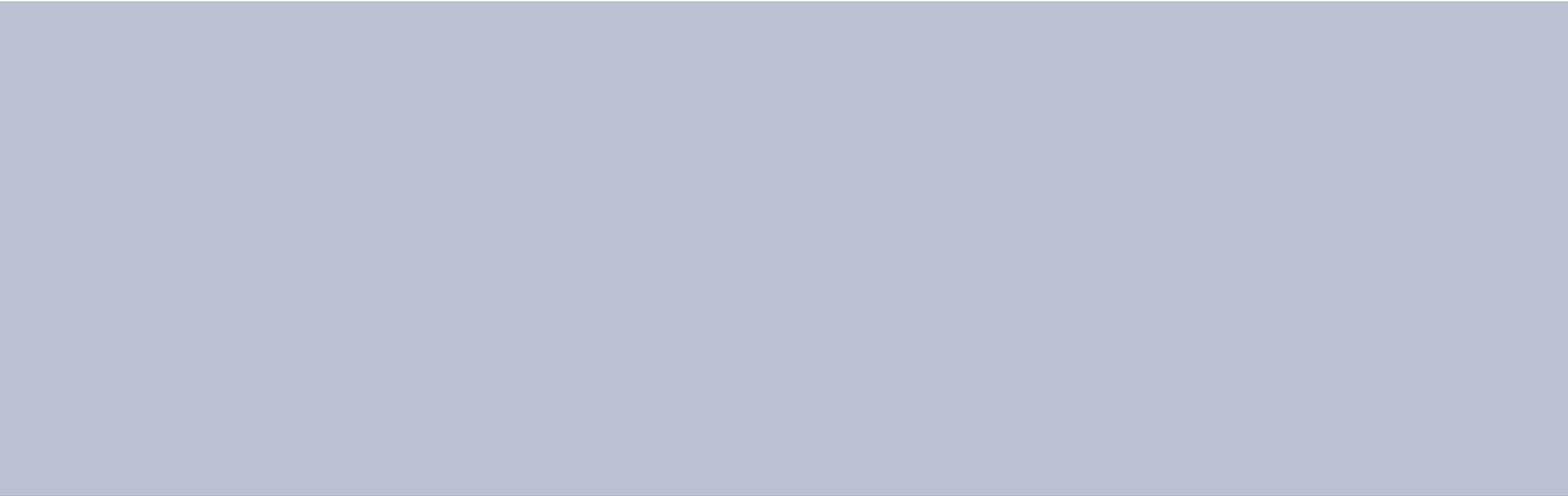
The screenshot shows the HealthConnect web application interface. The main content area is titled "Accounts > Account Summary (Main Street Account...) > Test Broker > Proposal Center". Below the title, there is a "Details" section with fields for "To", "CC", "Subject", and "Dear M". The "Subject" field is set to "Forms". Below the "Subject" field, there is a table of forms to be attached:

Include	Form	Category
<input type="checkbox"/>	NY ER & EE App & Tagline Document	Summary of Benefits and Coverage
<input type="checkbox"/>	NY ER & EE App & Tagline Document	Enrollment Kit
<input type="checkbox"/>	NY Benefit Grid 2017	Benefit Summaries
<input type="checkbox"/>	NY UW Guidelines 2017	Requirements

At the bottom of the form list, there are "Attach" and "Cancel" buttons. Below the form list, there is an "Attachments" section with a table of attached files:

Name	Type	Date	Actions
Physician List (10/26/2017 8:40:17 AM)	Plan Report	10/26/2017 08:40 AM	
NY (10/26/2017 8:29:57 AM)	Plan Report	10/26/2017 08:29 AM	

At the bottom of the page, there is a "Send" button.



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