

General Agent Portal

# Ebix/HealthConnect General Agent Portal

The Ebix/HealthConnect General Agent Portal is the premiere online storefront for General Agents. The portal allows for the easy quoting of multiple carriers and an assortment of plans in a quick and efficient manner. The portal also allows for seamless integration with the broker facing portal and allows the GA site to become the center for all of its brokers' needs.

Ebix/HealthConnect's General Agent Portal 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. The work can be done by the GA or broker and seen and shared by each. GA's have complete control and reporting and analysis capabilities. This intuitive system is adopted regardless of previous computer skills. The Ebix/HealthConnect General Agent Portal is proven, safe, reliable, and accurate so brokers know they can have the utmost confidence in information to present in the field as well as the information they load into the system. 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 brands each GA Portal with the GA's look and feel. GA logos and colors dominate the scheme so that brokers never know that they have left the GA's site. The technology is brought to the broker via the GA, not Ebix/HealthConnect.

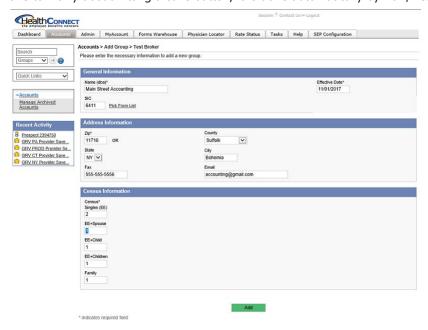


## **Company Input**

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.

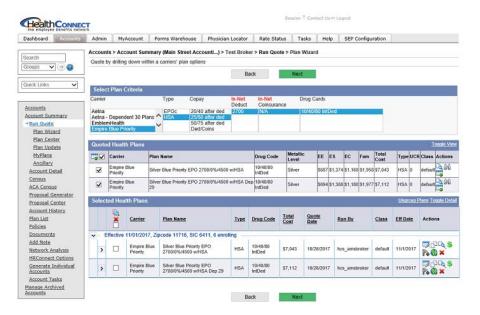
## **Automatic Saving**

Ebix/HealthConnect automatically saves any and all information as you switch from screen to screen. Users never have to worry about hitting a save button, it is done automatically by Ebix/HealthConnect.



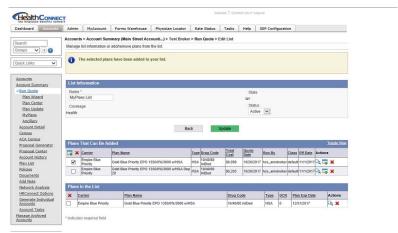
#### **Plan Wizard**

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.



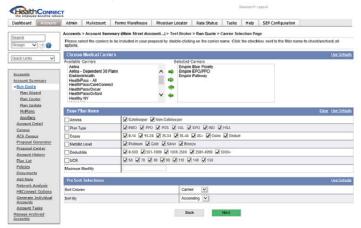
#### Save Your Favorites

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.



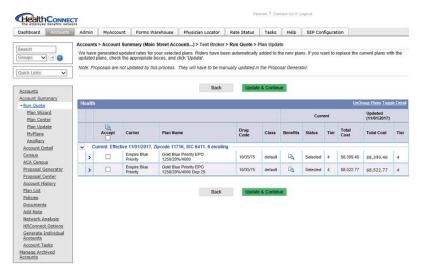
#### **Plan Center**

Ebix/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.



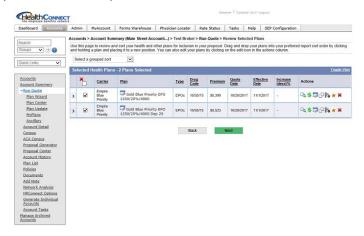
# **Updating**

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.



### **Report Generator**

Ebix/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.



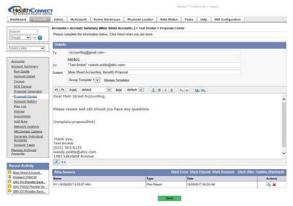
## **Multiple Reporting Options**

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.



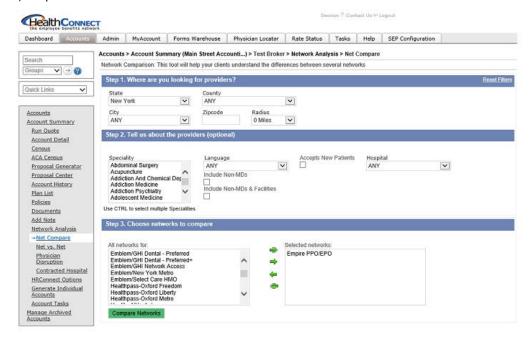
# **Distribution Options**

Ebix/HealthConnect provides different methods through which a broker can deliver a proposal to their client: 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.



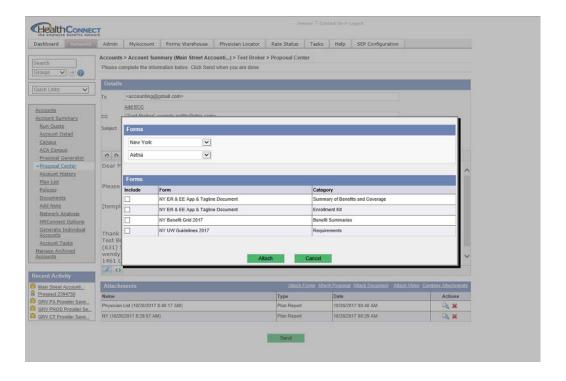
## **Compare Doctors and Networks**

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



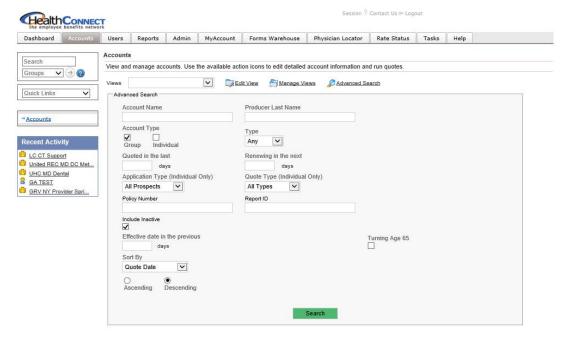
# **Attaching Important Documents**

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.



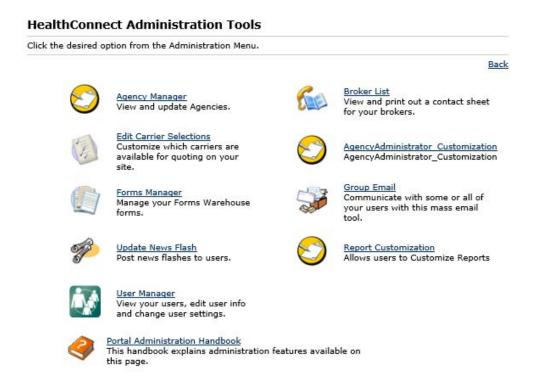
### **Searching**

General Agents can find information on agencies, brokers, or groups by searching on any number of available criteria including quote dates, effective dates, carriers, group size, location, and other characteristics.



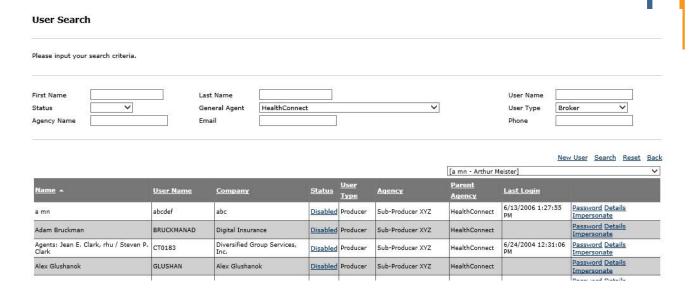
#### **Communication Features**

GA's can post information about promotions, products, programs, classes, events or whatever they choose. Theses are not pop-ups but actual page turns that appear right before the broker uses the system. Email and mail merge lists are easily generated by using the entire database of users.



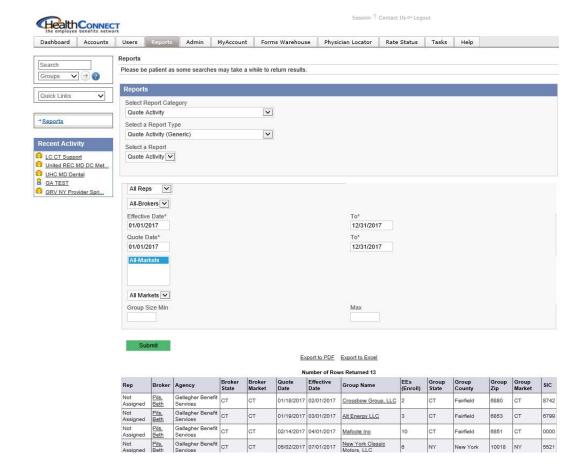
### **Administrative Control**

GA's control every facet of their site including broker access, available products, and user rights levels. Simple administrative tools enable the GA to make changes from anyplace at anytime.



### Reports

GA's can generate activity reports in aggregate or based on specific brokers. Quote volume, group information, selected plans, or even the percentage of work done by the broker versus the work done by the GA are available in excel format with only a few clicks.





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