



## 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.

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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 (d0a)\*  
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  
1

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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Accounts > Account Summary (Main Street Account...) > 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	25/50 after ded			
EmblemHealth		50/75 after 60d			
Empire Blue Priority		Ded/Coins			

**Quoted Health Plans**

Carrier	Plan Name	Drug Code	Metalic Level	EE	ES	EC	Fam	Total Cost	Type	UCR	Class	Actions
Empire Blue Priority	Silver Blue Priority EPO 2700/0%/4500 whHSA	10/40/80 IntDed	Silver	\$687	\$1,374	\$1,162	\$1,958	\$7,043	HSA	0	default	
Empire Blue Priority	Silver Blue Priority EPO 2700/0%/4500 whHSA 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 whHSA	HSA	10/40/80 IntDed	\$7,043	10/26/2017	hcs_amsbroker	default	11/1/2017	
Empire Blue Priority	Silver Blue Priority EPO 2700/0%/4500 whHSA Dep 29	HSA	10/40/80 IntDed	\$7,112	10/26/2017	hcs_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.

The screenshot shows the 'MyPlans' section in HealthConnect. It includes a search bar, a navigation menu on the left, and a main content area with the following sections:

- List Information:** Shows details for the selected plan, including Name (\*), MyPlans List, State (NY), Coverage, Status (Active), and Health.
- Plans That Can Be Added:** A table listing available plans with columns for Carrier, Plan Name, Type, Drug Code, Total Cost, Effective Date, Plan ID, Class, and Plan Exp. Date. Two 'Empire Blue Priority' plans are listed.
- Plans in the List:** A table showing plans already saved to the user's list, including the 'Empire Blue Priority' plan.

## 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.

The screenshot shows the 'Plan Center' section in HealthConnect. It includes a search bar, a navigation menu on the left, and a main content area with the following sections:

- Choose Medical Carriers:** A section for selecting carriers, showing 'Available Carriers' and 'Selected Carriers'.
- Class Plan Rules:** A table of filters for plan selection, including checkboxes for Access, Plan Type, Copay, Metallic Level, Deductible, and UCR.
- Pre-Sort Selections:** A section for sorting the results by Carrier and Sort By.

## 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.

The screenshot shows the 'Plan Update' section in HealthConnect. It includes a search bar, a navigation menu on the left, and a main content area with the following sections:

- Plan Update:** A section for updating plans, including a note that proposals are not updated by this process.
- Health Table:** A table comparing 'Current' and 'Updated (11/01/2017)' plans. The table has columns for Accept, Carrier, Plan Name, Drug Code, Class, Benefits, Status, Tier, Total Cost, and Tier.

## 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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Accounts > Account Summary (Main Street Account...) > 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

<input type="checkbox"/>	Carrier	Plan	Type	Dmg Code	Premium	Quote Date	Effective Date	Increase (decr)%	Actions
<input checked="" type="checkbox"/>	Empire Blue	Gold Blue Priority EPO 1250/20%/4000	EPOc	10/05/75	\$8,399	10/26/2017	11/1/2017	-	
<input checked="" type="checkbox"/>	Empire Blue	Gold Blue Priority EPO 1250/20%/4000 Dwp 29	EPOc	10/05/75	\$8,523	10/26/2017	11/1/2017	-	

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## Multiple Reporting Options

Ebiz/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.

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

Select reports that you want to generate. Use the "Save Settings" option to save the selected reports as your default selection.

Proposal Options

- Combine PDF's (Excel reports do not combine)
- Cover Page
  - Black & White  Color
  - Portrait  Landscape
- Census for the most recent year
  - PDF  Excel
- ACA Census Report (for 2014 Plans only)
- ACA Census Report Summary (for 2014 Plans only)
- Annual rate by side comparison
  - Black & White  Color
  - IP  SP  3P  XL  AL  BL

Health Benefit Options

- Plan Report New (2014)
- All Quoted Plans
- Individual Plan Report
- Multi-Choice Plan assignment Report
- Benefits Summary
- Contribution with Benefits
- Contribution Summary
- Plan Report

Supplemental Options

- HRA Savings Illustration
- ACA Health Insurance HRA Savings Illustration

Additional Options

- HRA Savings Illustration
- ACA Health Insurance HRA Savings Illustration

Supplemental Options

- HRA Savings Illustration
- ACA Health Insurance HRA Savings Illustration

Network and Physician Reports

- Premium List
- County Summary
- Blank Physician

## Distribution Options

Ebiz/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.

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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 > Proposal Center

Please complete the information below. Click Send when you are done.

Details

To: accounting@gmail.com

FROM: RBEG

CC: "Test Broker" <testb@ebiz.com>

Subject: Main Street Accounting Benefits Proposal

Group Template: Message Template

Font: default Size: default

Dear Main Street Accounting,

Please review and call should you have any questions.

[template-proposallink]

Thank you,  
Test Broker  
(631) 563-6122  
testb@ebiz.com  
1481 Lakeland Avenue

Attachments

File Name	Type	Date	Actions
NY 10262017 2 29 57 AM	New Report	10/26/2017 08:29 AM	

Send

## 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...

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Session ? Contact Us Logout

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

Accounts > Account Summary (Main Street Accounti...) > 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)

Speciality: Abdominal Surgery, Acupuncture, Addiction And Chemical Dep, Addiction Medicine, Addiction Psychiatry, Adolescent Medicine. Language: ANY. Accepts New Patients: . Hospital: ANY. Include Non-MDs: . Include Non-MDs & Facilities:

Use CTRL to select multiple Specialities.

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](#)

## 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.

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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 > Proposal Center

Please complete the information below. Click Send when you are done.

Details

To: <accounting@gmail.com>

CC: <Test.Broker@wvondy.com>

Subject: Forms

Dear M

Please

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

Thank Test B (631) wendy 1461 L

Attachments

Name	Type	Date	Actions
Physician List (10/26/2017 8:40:17 AM)	Plan Report	10/26/2017 08:40 AM	<a href="#">Download</a> <a href="#">Delete</a>
NY (10/26/2017 8:29:57 AM)	Plan Report	10/26/2017 08:29 AM	<a href="#">Download</a> <a href="#">Delete</a>

[Send](#)

## 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.

The screenshot shows the HealthConnect web application interface. At the top, there is a navigation menu with options: Dashboard, Accounts, Users, Reports, Admin, MyAccount, Forms Warehouse, Physician Locator, Rate Status, Tasks, and Help. The 'Accounts' section is active. Below the navigation, there is a search bar with a 'Search' button and a 'Groups' dropdown menu. To the left, there is a 'Quick Links' dropdown and a 'Recent Activity' list with items like 'LC CT Support', 'United REC MD DC Met...', 'UHC MD Dental', 'GA TEST', and 'GRV NY Provider Spri...'. The main content area is titled 'Accounts' and contains the text: 'View and manage accounts. Use the available action icons to edit detailed account information and run quotes.' Below this, there are 'Views' and 'Advanced Search' options. The 'Advanced Search' form includes fields for 'Account Name', 'Producer Last Name', 'Account Type' (Group/Individual), 'Type' (Any), 'Quoted in the last' (days), 'Renewing in the next' (days), 'Application Type (Individual Only)' (All Prospects), 'Quote Type (Individual Only)' (All Types), 'Policy Number', 'Report ID', 'Include Inactive' (checked), 'Effective date in the previous' (days), 'Turning Age 65' (checkbox), and 'Sort By' (Quote Date, Ascending/Descending). A green 'Search' button is at the bottom of the form.

## Communication Features

GA's can post information about promotions, products, programs, classes, events or whatever they choose. These 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.

### HealthConnect Administration Tools

Click the desired option from the Administration Menu.

[Back](#)



[Agency Manager](#)  
View and update Agencies.



[Broker List](#)  
View and print out a contact sheet for your brokers.



[Edit Carrier Selections](#)  
Customize which carriers are available for quoting on your site.



[AgencyAdministrator\\_Customization](#)  
AgencyAdministrator\_Customization



[Forms Manager](#)  
Manage your Forms Warehouse forms.



[Group Email](#)  
Communicate with some or all of your users with this mass email tool.



[Update News Flash](#)  
Post news flashes to users.



[Report Customization](#)  
Allows users to Customize Reports



[User Manager](#)  
View your users, edit user info and change user settings.



[Portal Administration Handbook](#)  
This handbook explains administration features available on this page.

## 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 anywhere at anytime.

### User Search

Please input your search criteria.

First Name	<input type="text"/>	Last Name	<input type="text"/>	User Name	<input type="text"/>
Status	<input type="text"/>	General Agent	<input type="text" value="HealthConnect"/>	User Type	<input type="text" value="Broker"/>
Agency Name	<input type="text"/>	Email	<input type="text"/>	Phone	<input type="text"/>

[New User](#) [Search](#) [Reset](#) [Back](#)

[a mn - Arthur Meister]

Name	User Name	Company	Status	User Type	Agency	Parent Agency	Last Login	
a mn	abcdef	abc	<a href="#">Disabled</a>	Producer	Sub-Producer XYZ	HealthConnect	6/13/2006 1:27:55 PM	<a href="#">Password Details</a> <a href="#">Impersonate</a>
Adam Bruckman	BRUCKMANAD	Digital Insurance	<a href="#">Disabled</a>	Producer	Sub-Producer XYZ	HealthConnect		<a href="#">Password Details</a> <a href="#">Impersonate</a>
Agents: Jean E. Clark, rhu / Steven P. Clark	CT0183	Diversified Group Services, Inc.	<a href="#">Disabled</a>	Producer	Sub-Producer XYZ	HealthConnect	6/24/2004 12:31:06 PM	<a href="#">Password Details</a> <a href="#">Impersonate</a>
Alex Glushanok	GLUSHAN	Alex Glushanok	<a href="#">Disabled</a>	Producer	Sub-Producer XYZ	HealthConnect		<a href="#">Password Details</a> <a href="#">Impersonate</a>

## 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.



Session ? Contact Us ? Logout

Dashboard	Accounts	Users	Reports	Admin	MyAccount	Forms Warehouse	Physician Locator	Rate Status	Tasks	Help
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Search

Groups

Quick Links

[Reports](#)

**Recent Activity**

- LC CT Support
- United REG MD DC Met...
- UHC MD Dental
- GA TEST
- GRV NY Provider Spri...

**Reports**

Please be patient as some searches may take a while to return results.

Select Report Category  
Quote Activity

Select a Report Type  
Quote Activity (Generic)

Select a Report  
Quote Activity

All Reps

All-Brokers

Effective Date\*  To\*

Quote Dale\*  To\*

All-Markets

All Markets

Group Size Min  Max

[Export to PDF](#) [Export to Excel](#)

Number of Rows Returned 13

Rep	Broker	Agency	Broker State	Broker Market	Quote Date	Effective Date	Group Name	EEs (Enroll)	Group State	Group County	Group Zip	Group Market	SIC
Not Assigned	Pils, Beth	Gallagher Benefit Services	CT	CT	01/18/2017	02/01/2017	Crossbow Group, LLC	2	CT	Fairfield	0880	CT	8742
Not Assigned	Pils, Beth	Gallagher Benefit Services	CT	CT	01/19/2017	03/01/2017	Alt Energy LLC	3	CT	Fairfield	0853	CT	0700
Not Assigned	Pils, Beth	Gallagher Benefit Services	CT	CT	02/14/2017	04/01/2017	Mafoote Inc	10	CT	Fairfield	0851	CT	0000
Not Assigned	Pils, Beth	Gallagher Benefit Services	CT	CT	05/02/2017	07/01/2017	New York Classic Motors, LLC	8	NY	New York	10018	NY	5521



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