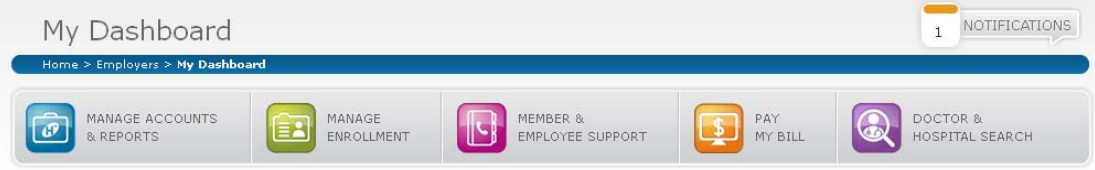
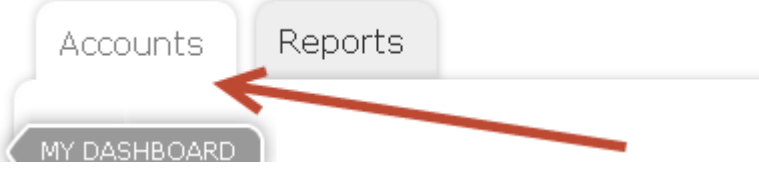
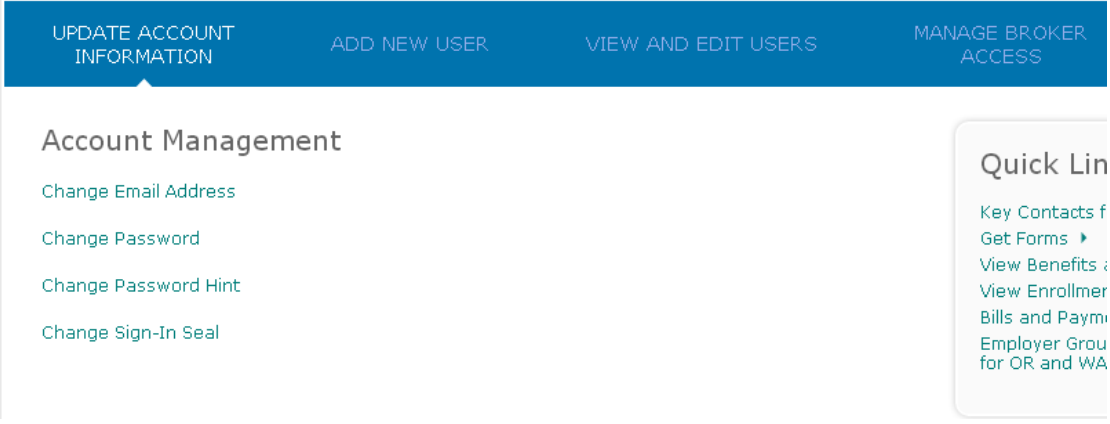


## Topic 9 - To Manage Broker Access

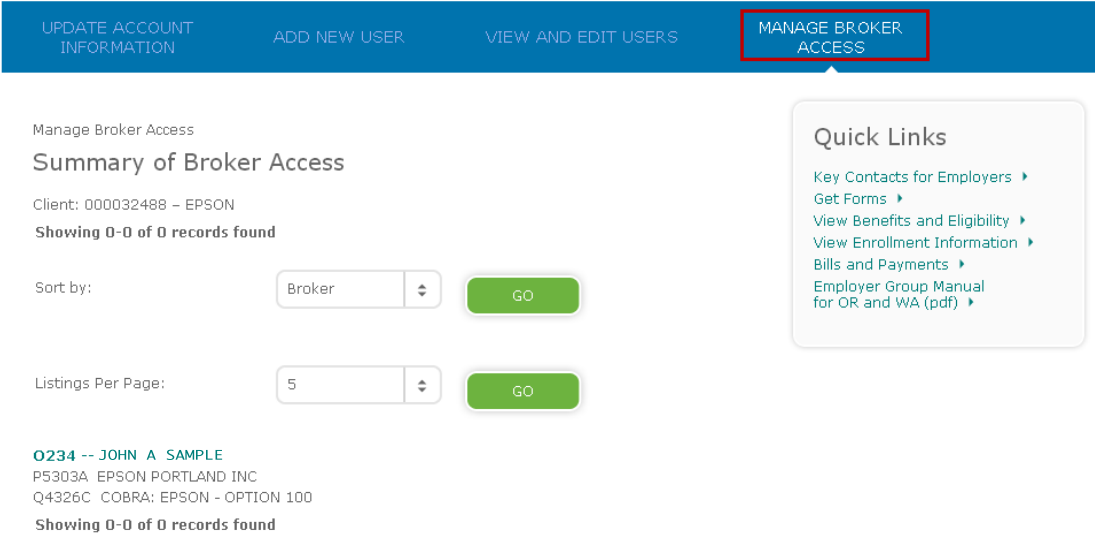
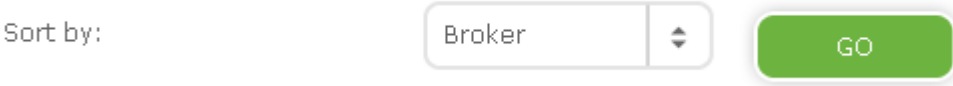
### Manage Broker Access

Follow the next easy steps to enable or disable Online Billing and Enrollment access to your broker of record.

Step	Action
1	<p>Click on the <b>Manage Accounts &amp; Reports</b> button.</p>  <p>The screenshot shows a 'My Dashboard' header with a 'NOTIFICATIONS' badge. Below the header is a navigation bar with 'Home &gt; Employers &gt; My Dashboard'. A row of five buttons is visible: 'MANAGE ACCOUNTS &amp; REPORTS' (highlighted), 'MANAGE ENROLLMENT', 'MEMBER &amp; EMPLOYEE SUPPORT', 'PAY MY BILL', and 'DOCTOR &amp; HOSPITAL SEARCH'.</p>
2	<p>Click on the <b>Accounts</b> tab (this may be the default landing place).</p>  <p>The screenshot shows two tabs: 'Accounts' and 'Reports'. The 'Accounts' tab is selected and highlighted with a blue bar. A red arrow points to the 'Accounts' tab.</p> <p><b>Result:</b> The system will display the menu with all options available. In addition, the default landing page will display the options available.</p>  <p>The screenshot shows the 'Account Management' menu. The top navigation bar contains 'UPDATE ACCOUNT INFORMATION', 'ADD NEW USER', 'VIEW AND EDIT USERS', and 'MANAGE BROKER ACCESS' (highlighted). Below the navigation bar, the 'Account Management' section lists: 'Change Email Address', 'Change Password', 'Change Password Hint', and 'Change Sign-In Seal'. A 'Quick Lin' sidebar is visible on the right with links for 'Key Contacts f', 'Get Forms', 'View Benefits', 'View Enrollment Bills and Paym', and 'Employer Group for OR and WA'.</p> <p><b>Note:</b> This menu reflects full and complete access. Some of this functionality might not be available if the user has lesser access by their administrator.</p>

Continued on next page

## Topic 9 - To Manage Broker Access, Continued

Step	Action
3	<p>Click on <b>Manage Broker Access</b>.</p>  <p>UPDATE ACCOUNT INFORMATION    ADD NEW USER    VIEW AND EDIT USERS    <b>MANAGE BROKER ACCESS</b></p> <p>Manage Broker Access</p> <p><b>Summary of Broker Access</b></p> <p>Client: 000032488 - EPSON</p> <p>Showing 0-0 of 0 records found</p> <p>Sort by: <input type="text" value="Broker"/> <input type="button" value="GO"/></p> <p>Listings Per Page: <input type="text" value="5"/> <input type="button" value="GO"/></p> <p><b>O234 -- JOHN A SAMPLE</b>  P5303A EPSON PORTLAND INC  Q4326C COBRA: EPSON - OPTION 100</p> <p>Showing 0-0 of 0 records found</p> <p><b>Quick Links</b></p> <ul style="list-style-type: none"> <li>Key Contacts for Employers ▶</li> <li>Get Forms ▶</li> <li>View Benefits and Eligibility ▶</li> <li>View Enrollment Information ▶</li> <li>Bills and Payments ▶</li> <li>Employer Group Manual for OR and WA (pdf) ▶</li> </ul>
4	<p>Select the sorting order (the default is to sort by Broker). Click on the <b>Go</b> button.</p>  <p>Sort by: <input type="text" value="Broker"/> <input type="button" value="GO"/></p>

<p>5</p>	<p>Double click on the Broker (or Group) name, which is a hyperlink.</p> <p><b>OREO -- JOHN D. STUFF,</b></p> <p><b>Result:</b> The Broker Access screen will be displayed indicating the Billing and Enrollment functions to which your broker has access.</p> <p><b>Manage Broker Access</b> OREO -- JOHN D. STUFF</p> <ul style="list-style-type: none"> <li>‣ Access Privileges</li> <li>‣ Notification Preferences</li> </ul> <p><i>Click on tabs to view and set all website functions.</i></p> <div style="border: 2px solid red; padding: 5px; display: inline-block;"> <span>BILLING FUNCTIONS</span>   <span>ENROLLMENT FUNCTIONS</span> </div> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th></th> <th>View Bills</th> <th>Pay Bills</th> <th>Billing Notifications</th> </tr> </thead> <tbody> <tr> <td>P1234A – RANDOM CORP INC</td> <td style="text-align: center;">✓</td> <td style="text-align: center;">✓</td> <td style="text-align: center;">✓</td> </tr> <tr> <td>Q3456C – COBRA: RANDOM CORP - OPTION XYZ</td> <td style="text-align: center;">✓</td> <td style="text-align: center;">✓</td> <td style="text-align: center;">✓</td> </tr> </tbody> </table> <p style="text-align: right;"><span style="border: 1px solid green; border-radius: 10px; padding: 5px 15px; display: inline-block;">EDIT</span></p>		View Bills	Pay Bills	Billing Notifications	P1234A – RANDOM CORP INC	✓	✓	✓	Q3456C – COBRA: RANDOM CORP - OPTION XYZ	✓	✓	✓
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P1234A – RANDOM CORP INC	✓	✓	✓										
Q3456C – COBRA: RANDOM CORP - OPTION XYZ	✓	✓	✓										
<p>6</p>	<p>Click on the <b>Edit</b> button.</p> <p style="text-align: center;"><span style="border: 1px solid green; border-radius: 10px; padding: 5px 15px; display: inline-block;">EDIT</span></p>												

*Continued on next page*

## Topic 9 - To Manage Broker Access, Continued

Step	Action																
7	<p>Click on the <b>Billing Functions</b> and click on the function you would like to edit.</p> <p>Click on tabs to view and set all website functions.</p> <div style="border: 1px solid gray; padding: 5px; margin-bottom: 10px;"> <span style="border: 1px solid gray; padding: 2px 10px; margin-right: 5px;">BILLING FUNCTIONS</span> <span style="border: 1px solid gray; padding: 2px 10px; margin-right: 5px;">ENROLLMENT FUNCTIONS</span> </div> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 45%;"></th> <th style="width: 15%;">View Bills</th> <th style="width: 15%;">Pay Bills</th> <th style="width: 25%;">Billing Notifications</th> </tr> </thead> <tbody> <tr> <td></td> <td style="text-align: center;"> <input type="button" value="CHECK ALL"/>  <input type="button" value="UNCHECK ALL"/> </td> <td style="text-align: center;"> <input type="button" value="CHECK ALL"/>  <input type="button" value="UNCHECK ALL"/> </td> <td style="text-align: center;"> <input type="button" value="CHECK ALL"/>  <input type="button" value="UNCHECK ALL"/> </td> </tr> <tr> <td>P1234A – RANDOM CORP INC</td> <td style="text-align: center;"><input checked="" type="checkbox"/></td> <td style="text-align: center;"><input checked="" type="checkbox"/></td> <td style="text-align: center;"><input checked="" type="checkbox"/></td> </tr> <tr> <td>Q3456C – COBRA: RANDOM CORP - OPTION XYZ</td> <td style="text-align: center;"><input checked="" type="checkbox"/></td> <td style="text-align: center;"><input checked="" type="checkbox"/></td> <td style="text-align: center;"><input checked="" type="checkbox"/></td> </tr> </tbody> </table> <p><b>Note:</b> The box with the fill mark represents that the Broker has access to that function. The box without the fill mark represents that the Broker does not have access to that function.</p>		View Bills	Pay Bills	Billing Notifications		<input type="button" value="CHECK ALL"/> <input type="button" value="UNCHECK ALL"/>	<input type="button" value="CHECK ALL"/> <input type="button" value="UNCHECK ALL"/>	<input type="button" value="CHECK ALL"/> <input type="button" value="UNCHECK ALL"/>	P1234A – RANDOM CORP INC	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Q3456C – COBRA: RANDOM CORP - OPTION XYZ	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
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8	<p>Click on the <b>Enrollment Functions</b> and click on the function you would like to edit.</p> <div style="border: 1px solid gray; padding: 5px; margin-bottom: 10px;"> <span style="border: 1px solid gray; padding: 2px 10px; margin-right: 5px;">BILLING FUNCTIONS</span> <span style="border: 1px solid gray; padding: 2px 10px; margin-right: 5px;">ENROLLMENT FUNCTIONS</span> </div> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 45%;"></th> <th style="width: 15%;">View Enrollment</th> <th style="width: 15%;">Perform Enrollment</th> <th style="width: 25%;">Enrollment Notifications</th> </tr> </thead> <tbody> <tr> <td></td> <td style="text-align: center;"> <input type="button" value="CHECK ALL"/>  <input type="button" value="UNCHECK ALL"/> </td> <td style="text-align: center;"> <input type="button" value="CHECK ALL"/>  <input type="button" value="UNCHECK ALL"/> </td> <td style="text-align: center;"> <input type="button" value="CHECK ALL"/>  <input type="button" value="UNCHECK ALL"/> </td> </tr> <tr> <td>P1234A – RANDOM CORP INC</td> <td style="text-align: center;"><input type="checkbox"/></td> <td style="text-align: center;"><input checked="" type="checkbox"/></td> <td style="text-align: center;"><input checked="" type="checkbox"/></td> </tr> <tr> <td>Q3456C – COBRA: RANDOM CORP - OPTION XYZ</td> <td style="text-align: center;"><input type="checkbox"/></td> <td style="text-align: center;"><input checked="" type="checkbox"/></td> <td style="text-align: center;"><input checked="" type="checkbox"/></td> </tr> </tbody> </table> <p><b>Note:</b> The box with the fill mark represents that the Broker has access to that function. The box without the fill mark represents that the Broker does not have access to that function. Grayed out boxes in the <b>View Enrollment</b> option cannot be modified.</p>		View Enrollment	Perform Enrollment	Enrollment Notifications		<input type="button" value="CHECK ALL"/> <input type="button" value="UNCHECK ALL"/>	<input type="button" value="CHECK ALL"/> <input type="button" value="UNCHECK ALL"/>	<input type="button" value="CHECK ALL"/> <input type="button" value="UNCHECK ALL"/>	P1234A – RANDOM CORP INC	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Q3456C – COBRA: RANDOM CORP - OPTION XYZ	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
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9	<p>Click on the <b>Save</b> button.</p> <div style="border: 1px solid gray; padding: 5px; margin-top: 10px;"> <input type="button" value="SAVE"/> </div>																

Continued on next page

<p>10</p>	<p>Accept the <b>Terms &amp; Conditions</b>.</p> <p>Manage Broker Access</p> <p>Terms and Conditions</p> <p><i>Please read and accept the following terms and conditions.</i></p> <div data-bbox="358 499 1360 863" style="border: 1px solid #ccc; padding: 5px;"> <p>This Terms and Conditions of Use Agreement ("Agreement") is a legal agreement between you and Health Net, Inc. ("Health Net") governing your use of this Web site (the "site").</p> <p>YOUR USE OF THIS SITE IS SUBJECT TO THE TERMS AND CONDITIONS OF THIS AGREEMENT. BY ACCESSING, USING AND/OR VIEWING OUR SITE, YOU HEREBY AGREE TO BE BOUND BY THE TERMS OF THIS AGREEMENT. IF YOU DO NOT AGREE TO THESE TERMS AND CONDITIONS, YOU MUST EXIT THIS SITE. PLEASE NOTE THAT CHILDREN UNDER THE AGE OF THIRTEEN (13) ARE PROHIBITED FROM USING ANY HEALTH NET SITE, INCLUDING THE TEEN HEALTH SITE.</p> <p>Occasionally, the terms of this Agreement may change. If you access our site at any time after such a change in terms of the Agreement is posted, then you are deemed to have accepted and agreed to all of the revisions.</p> </div> <p><input type="checkbox"/> I accept the terms and conditions.</p> <div data-bbox="1122 1035 1425 1087" style="text-align: right;"> <span>CANCEL</span> <span>SUBMIT</span> </div> <p><b>Note:</b> The <b>Terms &amp; Conditions</b> will be presented when new functionality is added to the Broker's access. It will not be presented when functionality is removed from the Broker.</p>
<p>11</p>	<p>Click on the <b>Submit</b> button.</p> <div data-bbox="331 1297 480 1367" style="border: 1px solid #ccc; border-radius: 5px; padding: 5px; display: inline-block;"> <p>SUBMIT</p> </div>

<p>12</p>	<p>To assign Notification Preferences for the Broker, click on the <b>Notification Preferences</b> link.</p> <p><b>Manage Broker Access</b> ORED -- JOHN D. STUFF</p> <ul style="list-style-type: none"> <li>▶ <b>Access Privileges</b></li> <li>▶ Notification Preferences ←</li> </ul> <p><i>Click on tabs to view and set all website functions.</i></p> <p>BILLING FUNCTIONS   ENROLLMENT FUNCTIONS</p> <table border="1"> <thead> <tr> <th></th> <th>View Bills</th> <th>Pay Bills</th> <th>Billing Notifications</th> </tr> </thead> <tbody> <tr> <td>P1234A – RANDOM CORP INC</td> <td>✓</td> <td>✓</td> <td>✓</td> </tr> <tr> <td>Q3456C – COBRA: RANDOM CORP - OPTION XYZ</td> <td>✓</td> <td>✓</td> <td>✓</td> </tr> </tbody> </table> <p style="text-align: right;"><b>EDIT</b></p>		View Bills	Pay Bills	Billing Notifications	P1234A – RANDOM CORP INC	✓	✓	✓	Q3456C – COBRA: RANDOM CORP - OPTION XYZ	✓	✓	✓								
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<p>13</p>	<p>The screen will be displayed indicating the Billing and Enrollment Notifications to which your broker has been assigned.</p> <p><b>Manage Broker Access</b> ORED -- JOHN D. STUFF</p> <ul style="list-style-type: none"> <li>▶ <b>Access Privileges</b></li> <li>▶ Notification Preferences</li> </ul> <p><i>Click on tabs to view and set all website functions.</i></p> <p>BILLING NOTIFICATIONS   ENROLLMENT NOTIFICATIONS</p> <table border="1"> <thead> <tr> <th></th> <th>Bill is Ready</th> <th>Payment Posted</th> <th>Payment Not Processed</th> <th>Payment Denied</th> </tr> </thead> <tbody> <tr> <td></td> <td>           + Learn More            ✓         </td> <td>           + Learn More            ✓         </td> <td>           + Learn More            ✓         </td> <td>           + Learn More            ✓         </td> </tr> <tr> <td>P1234A – RANDOM CORP INC</td> <td>✓</td> <td></td> <td>✓</td> <td>✓</td> </tr> <tr> <td>Q3456C – COBRA: RANDOM CORP - OPTION XYZ</td> <td>✓</td> <td>✓</td> <td></td> <td>✓</td> </tr> </tbody> </table> <p style="text-align: right;"><b>EDIT</b></p>		Bill is Ready	Payment Posted	Payment Not Processed	Payment Denied		+ Learn More ✓	+ Learn More ✓	+ Learn More ✓	+ Learn More ✓	P1234A – RANDOM CORP INC	✓		✓	✓	Q3456C – COBRA: RANDOM CORP - OPTION XYZ	✓	✓		✓
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Q3456C – COBRA: RANDOM CORP - OPTION XYZ	✓	✓		✓																	
<p>14</p>	<p>Click on the <b>Edit</b> button.</p> <p style="text-align: center;"><b>EDIT</b></p>																				

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Click on the **Billing Notifications** and click on the notification you would like to assign.

Click on tabs to view and set all website functions.

BILLING NOTIFICATIONS		ENROLLMENT NOTIFICATIONS		
	<b>Bill is Ready</b> <a href="#">Learn More</a> <input type="button" value="CHECK ALL"/> <input type="button" value="UNCHECK ALL"/>	<b>Payment Posted</b> <a href="#">Learn More</a> <input type="button" value="CHECK ALL"/> <input type="button" value="UNCHECK ALL"/>	<b>Payment Not Processed</b> <a href="#">Learn More</a> <input type="button" value="CHECK ALL"/> <input type="button" value="UNCHECK ALL"/>	<b>Payment Denied</b> <a href="#">Learn More</a> <input type="button" value="CHECK ALL"/> <input type="button" value="UNCHECK ALL"/>
P1234A - RANDOM CORP INC	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Q3456C - COBRA: RANDOM CORP - OPTION XYZ	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

**Note:** Notifications can only be assigned when the employer has given the Broker access to the Notifications in the **Access Privileges** area.

**Note:** The box with the fill mark represents that the Broker has access to that function. The box without the fill mark represents that the Broker does not have access to that function.

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Click on the **Enrollment Notifications** and click on the notification you would like to assign.

Click on tabs to view and set all website functions.

BILLING NOTIFICATIONS		ENROLLMENT NOTIFICATIONS	
	<b>Enrollment Request Expiring Soon</b> <a href="#">Learn More</a> <input type="button" value="CHECK ALL"/> <input type="button" value="UNCHECK ALL"/>		
P1234A - RANDOM CORP INC	<input checked="" type="checkbox"/>		
Q3456C - COBRA: RANDOM CORP - OPTION XYZ	<input type="checkbox"/>		

**Note:** Notifications can only be assigned when the employer has given the Broker access to the Notifications in the **Access Privileges** area.

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Click on the **Save** button.