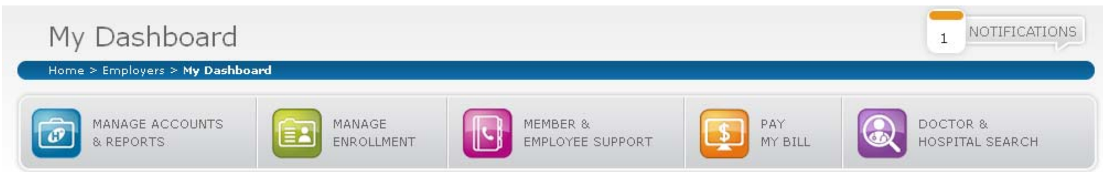
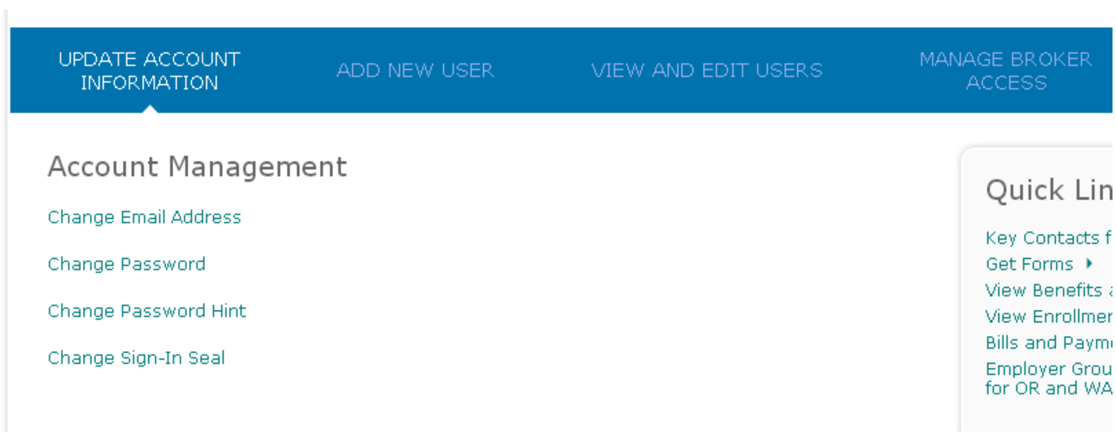
Topic 9 - To Manage Broker Access

Manage Broker Access

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

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Click on the Manage Accounts & Reports button.

</td></tr>
<tr><td>2</td><td>Click on the Accounts tab (this may be the default landing place).


Result: The system will display the menu with all options available. In addition, the default landing page will display the options available.


Note: This menu reflects full and complete access. Some of this functionality might not be available if the user has lesser access by their administrator.</td></tr>
</table>

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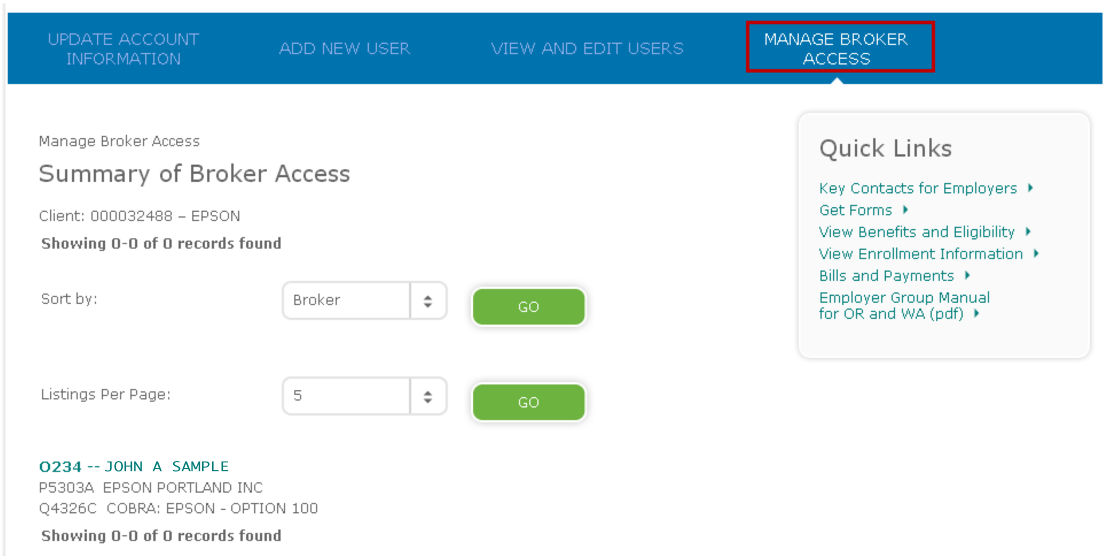
Topic 9 - To Manage Broker Access, Continued

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>3</td><td>Click on Manage Broker Access.



</td></tr>
<tr><td>4</td><td>Select the sorting order (the default is to sort by Broker). Click on the Go button.

</td></tr>
</table>

5

Double click on the Broker (or Group) name, which is a hyperlink.

OREO -- JOHN D. STUFF,

Result: The Broker Access screen will be displayed indicating the Billing and Enrollment functions to which your broker has access.

Manage Broker Access OREO -- JOHN D. STUFF

- Access Privileges
- Notification Preferences

Click on tabs to view and set all website functions.

BILLING FUNCTIONS | ENROLLMENT FUNCTIONS

	View Bills	Pay Bills	Billing Notifications
P1234A – RANDOM CORP INC	✓	✓	✓
Q3456C – COBRA: RANDOM CORP - OPTION XYZ	✓	✓	✓

EDIT

6

Click on the ***Edit*** button.

EDIT

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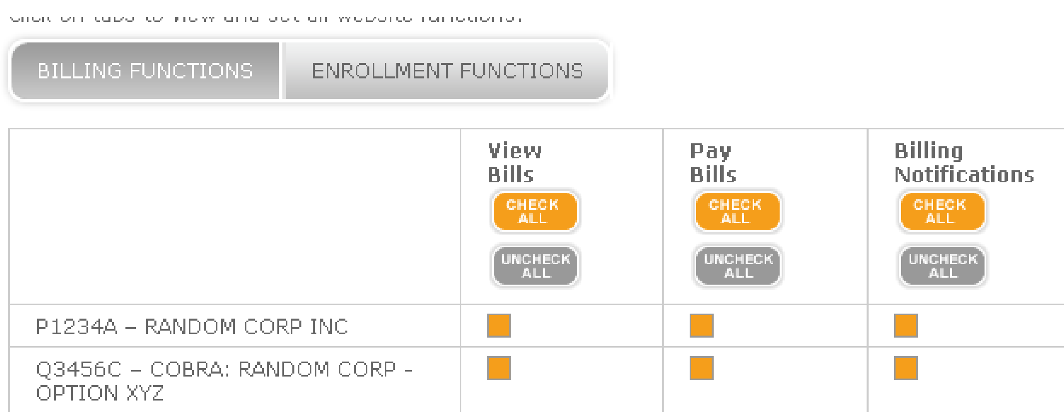
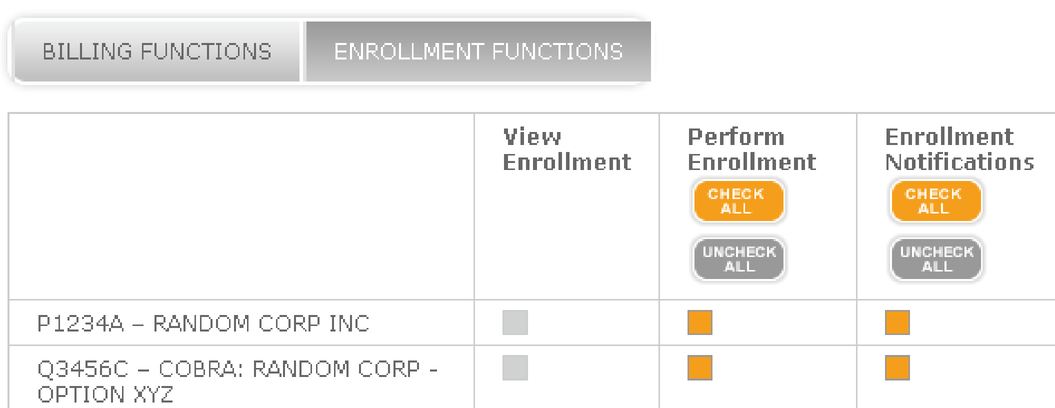
Step	Action
7	Click on the ***Billing Functions*** and click on the function you would like to edit.  ***Note:*** The box with the fill mark represents that the Broker has access to that function. The box without the fill mark represents that the Broker does not have access to that function.
8	Click on the ***Enrollment Functions*** and click on the function you would like to edit.  ***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. Grayed out boxes in the ***View Enrollment*** option cannot be modified.
9	Click on the ***Save*** button. 

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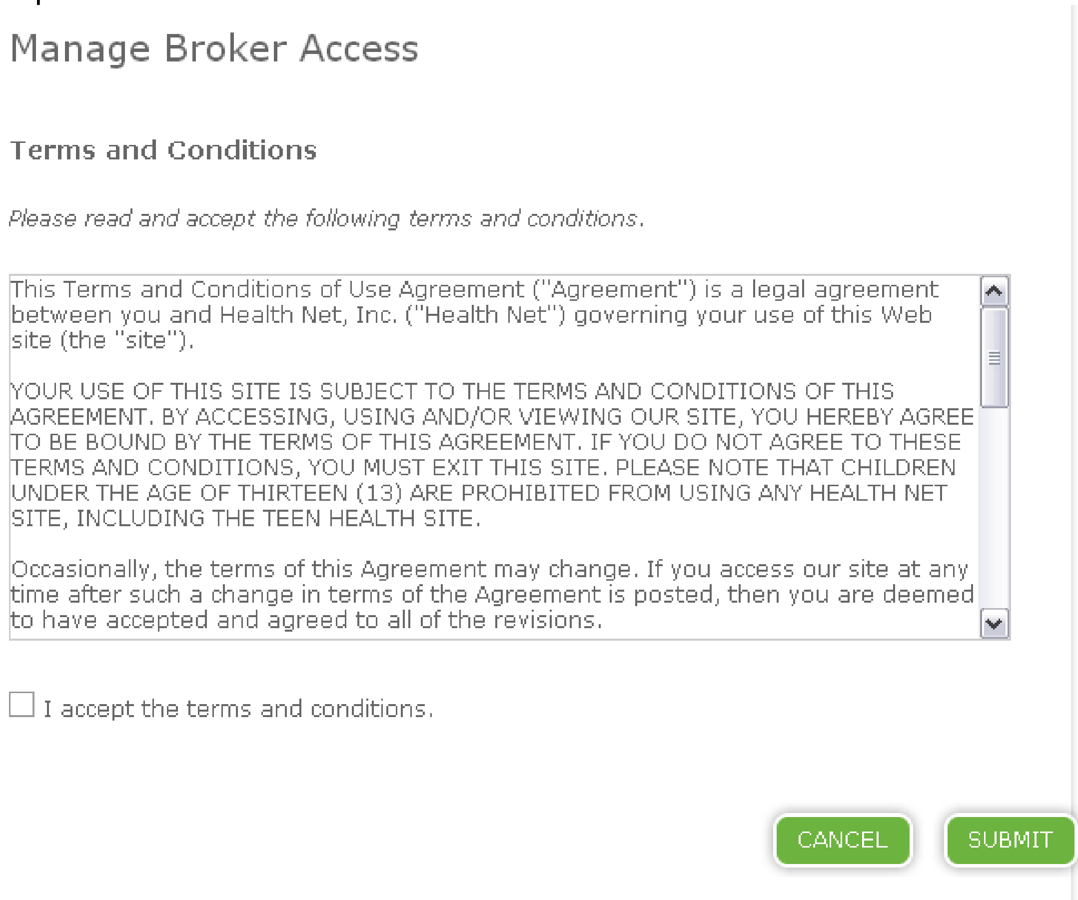
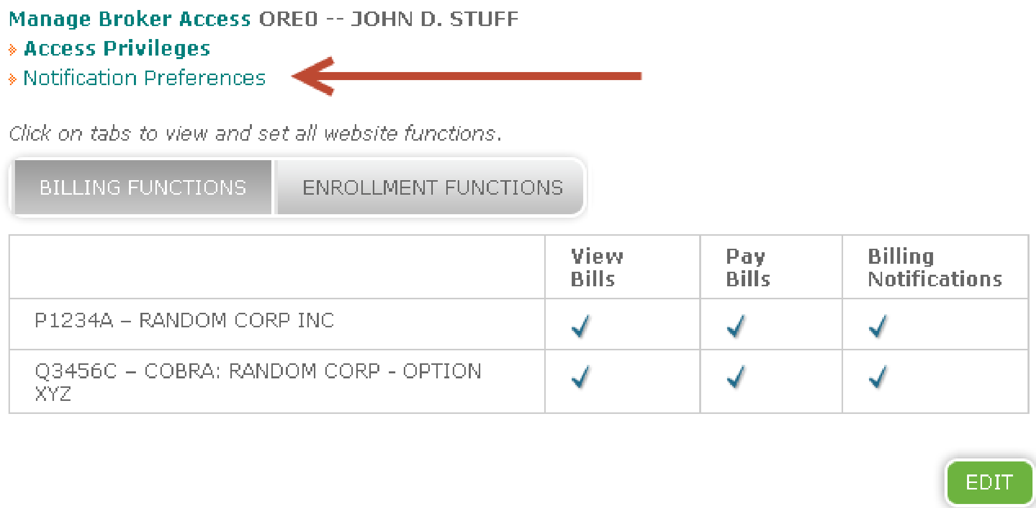
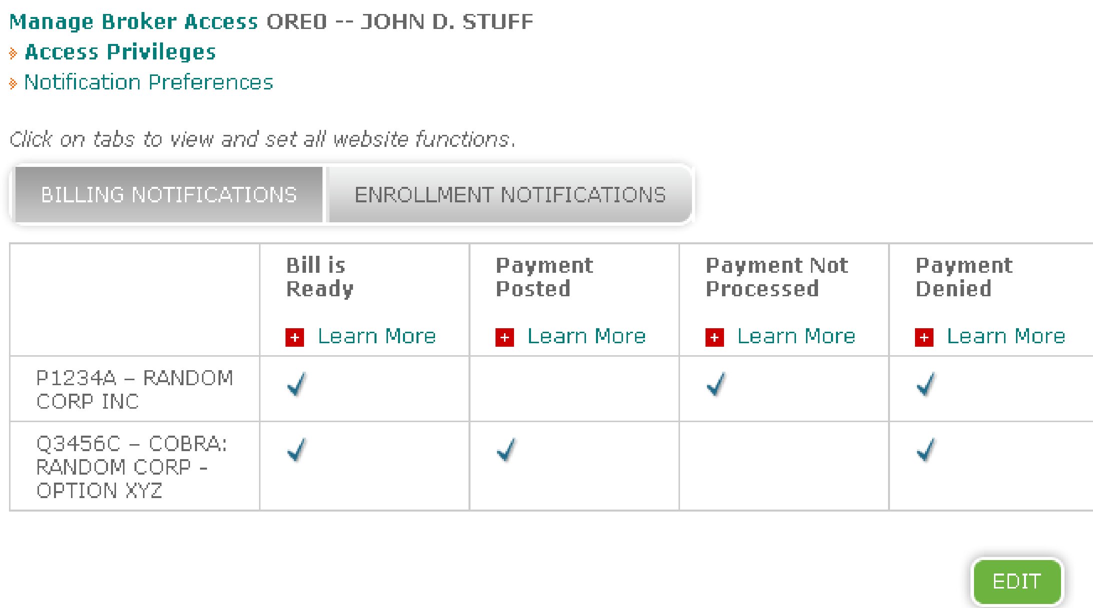
<table>
<tr><td>10</td><td>Accept the Terms & Conditions.


Note: The Terms & Conditions 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.</td></tr>
<tr><td>11</td><td>Click on the Submit button.

</td></tr>
</table>

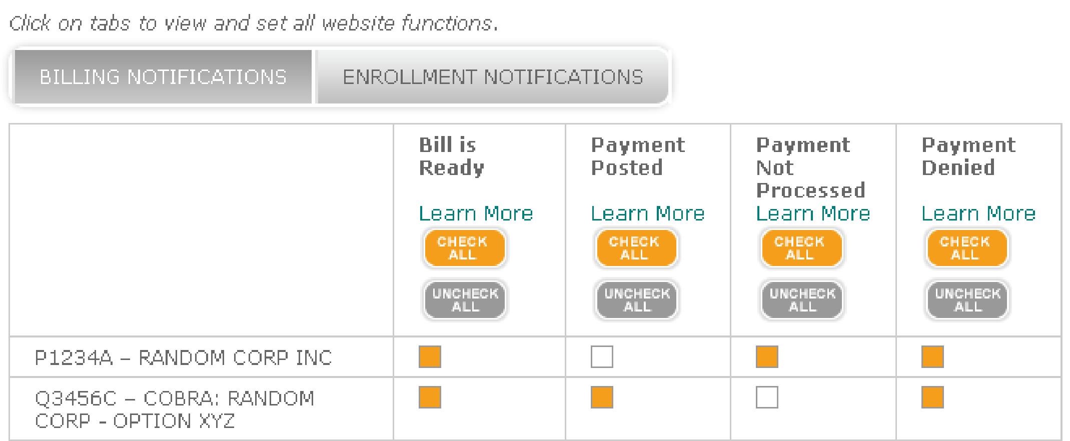
<table>
<tr><td>12</td><td>To assign Notification Preferences for the Broker, click on the Notification Preferences link.


</td></tr>
<tr><td>13</td><td>The screen will be displayed indicating the Billing and Enrollment Notifications to which your broker has been assigned.


</td></tr>
<tr><td>14</td><td>Click on the Edit button.

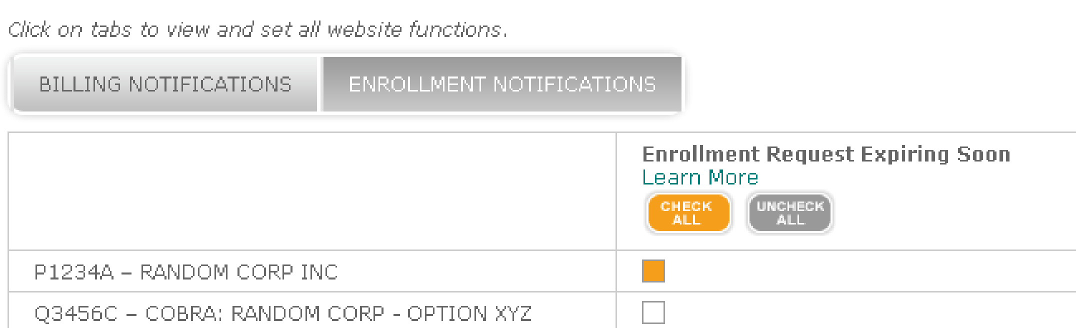

</td></tr>
</table>

<table>
<tr><td>15</td><td>Click on the Billing Notifications and click on the notification you would like to assign.



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.</td></tr>
<tr><td>16</td><td>Click on the Enrollment Notifications and click on the notification you would like to assign.



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.</td></tr>
<tr><td>17</td><td>Click on the Save button.

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</table>