my Arkansas Insurance

Agency User Manual

Version 2.0

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my Arkansas Insurance
Official Marketplace for Health Insurance

Copyright Information

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1: Acronyms

The Acronyms table provides a list of all acronyms included in the deliverable, along with the literal translation and definition.

Acronym	Definition
EIN	Employer Identification Number
FTE	Full Time Equivalent
QHP	Qualified Health Plan
SHOP	Small Business Health Options Program
SSN	Social Security Number
TIN	Tax Identification Number

Table 1: Acronyms

2: Introduction

An Agency has a network of Brokers and Broker Admin who sell group health Insurance plans to agency clients. Agencies access the Agent Portal to find and sell plans that match client requirements. It allows an agency to manage the functioning of Brokers and Broker Admin that are linked to it and perform following set of activities:

2.1: Purpose

This user manual describes how Agencies manage their prospects, apply for health insurance on behalf of customers, search plans, and share proposals with clients. Furthermore, it explains how the agency manages the functioning of Brokers and Broker Admins that are linked to it.

The key topics included in this manual are:

- Client operations
    - Managing clients
    - Managing proposals
- Agency Operations
- Managing agency operations
    - Managing Brokers
    - Managing Broker Admins
    - Managing documents
    - Managing cover page templates
    - Managing users

2.2: Audience

The target audience for this manual is agencies who use the Agent Portal to manage clients, create proposals, and assist their enrollment in a health plan.

2.3: Introduction to the Agent Portal

The Agent Portal is an easy-to-use online Portal that allows Agencies, Brokers and Broker Admins to sell individual and small group health insurance policies for individual and employer clients. The portal enables Brokers, Broker Admins, and Agency users to sign in using their credentials to do business.

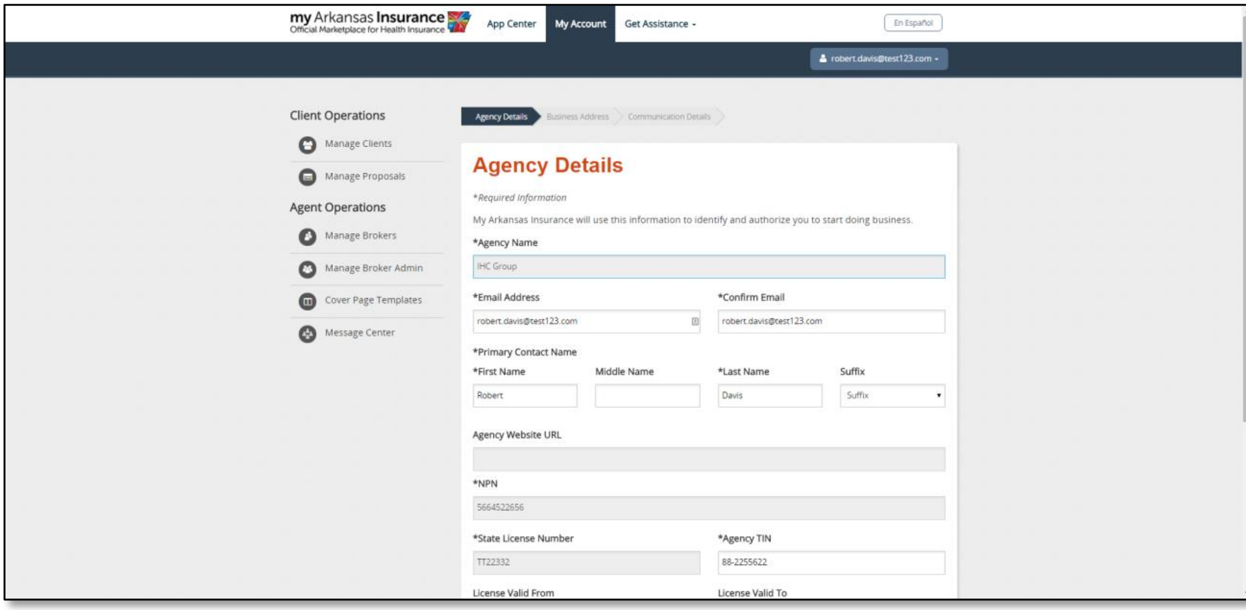


Figure 1. Agency Portal Landing Page

2.3.1: Navigating the Agent Portal

The following table explains how to navigate in the Agent Portal:

App Center	Language	My Account	Learn More
Click the **Apps Center** tab to be directed to the Manage Clients Introduction page. ➢	Click the **Language(s)** icon to view the Agent Portal in your preferred language.	Click **My Account** to view account details, including Agent Details, Business Address, and Communications Details.	Click **Get Assistance** to be directed to the Help Center.

Table 1: Agency Portal Navigation Options

3: User Account Management

3.1: Create a User Account

Creating a user account enables Agencies to sign in to the Agent Portal.

An Agency can create an account and register on the Agent Portal to assist state residents with their health insurance related questions and sell group health insurance policies to employers and employees.

Registered users can use their login credentials to sign in to the Agent Portal. A registered user can sign in and manage clients, Brokers, and Broker Admin, determine client eligibility, apply for health insurance coverage on behalf of customers, search plans, share proposals with customers, and enroll employees.

To create an account on the Agent Portal:

1. Go to www.myarinsurance.com.
2. Click **Manage SHOP** in the upper right-hand corner.
3. Click Agents/Brokers.

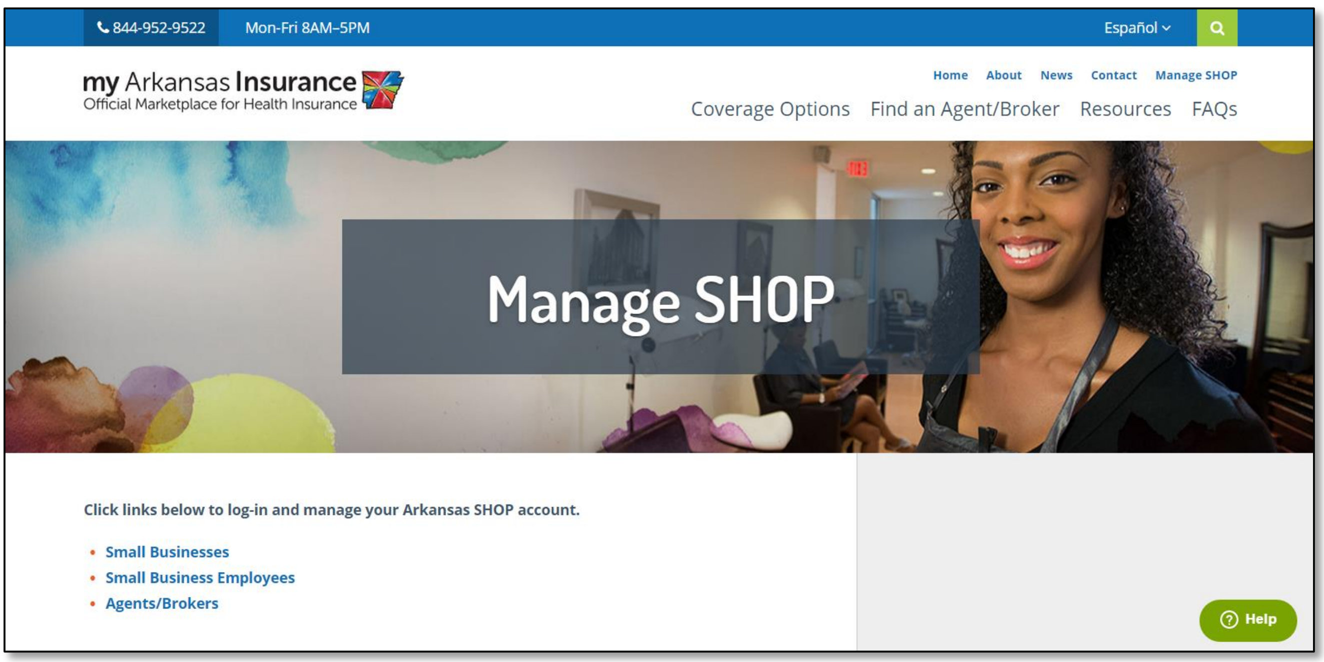


Figure 2. My Arkansas Insurance page

4. Click **Create Account**.

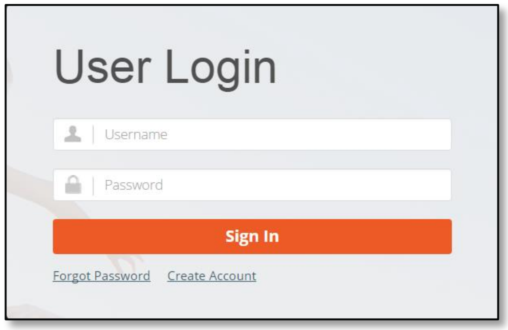


Figure 3. User Login

5. In the First Name field, enter your name.
6. In the Last Name field, enter your last name.
7. In the Email field, enter your email address.
8. In the Username field, enter a username. You have the option of using your email as a username.
9. In the Password field, enter your password.
10. In the Confirm Password field, enter your password again.
11. Select the "I agree and accept to the Privacy Policy statements" check box.
12. Click **Save**.
13. From the Security Question list, select your security questions.
14. In the Answer field, enter your respective answers for the security questions.
15. Click **Register**.

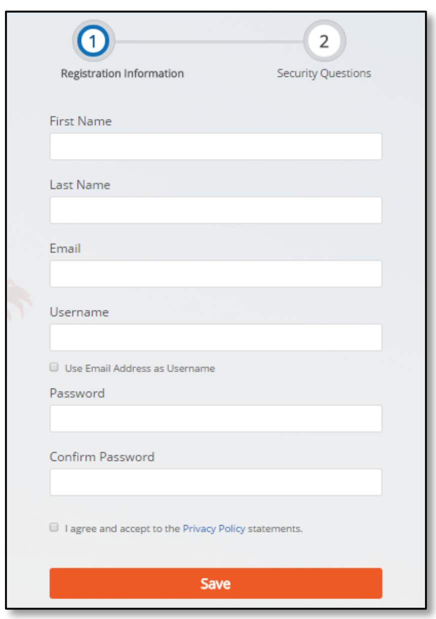
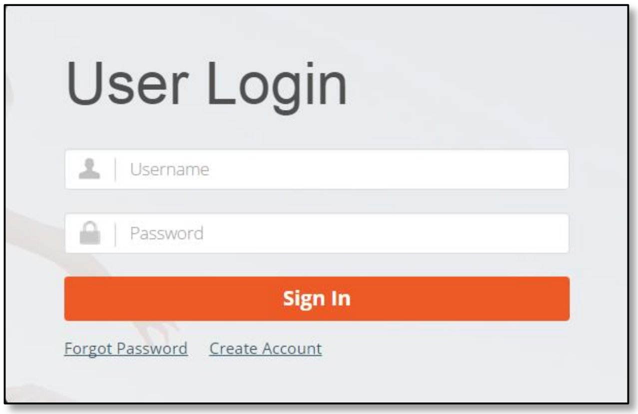


Figure 4. Registration page

Upon successful system authentication, you will be directed to the User Login page.

3.2: Login to the Agent Portal

1. In the Username field, enter Username.
2. In the Password field, enter Password.
3. Click **Sign In**.



3.3: Complete Your Agency Profile

After registration, the Agent Portal stores the details that you entered when you registered. You must complete your profile to perform activities for clients.

You are asked to provide the following information:

- Agency Details
- Business Address
- Communication Details

When you complete each section and click **Save and Continue,** the next section will display automatically. All fields marked with an asterisk (*) are mandatory.

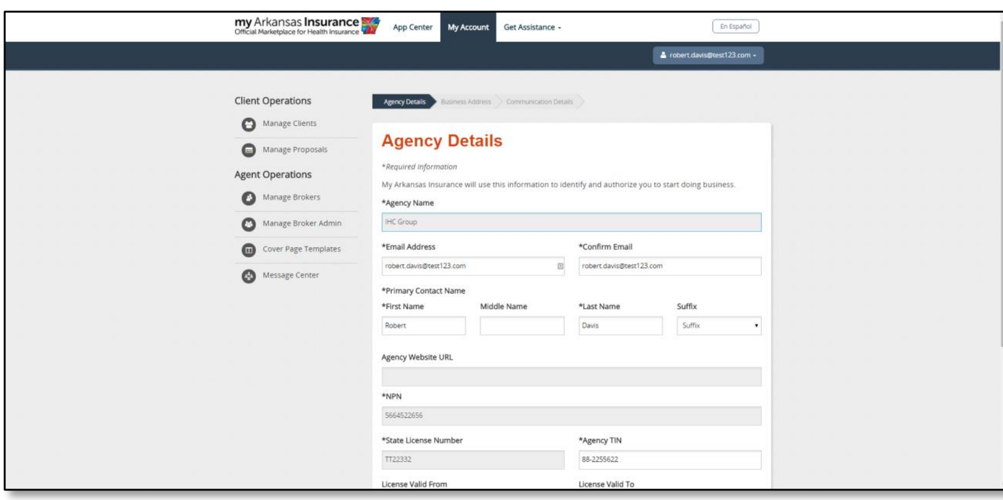


Figure 5. Agency Details page

3.3.1: Add Agency Details

The Agency Details page enables Agencies to provide agency information.

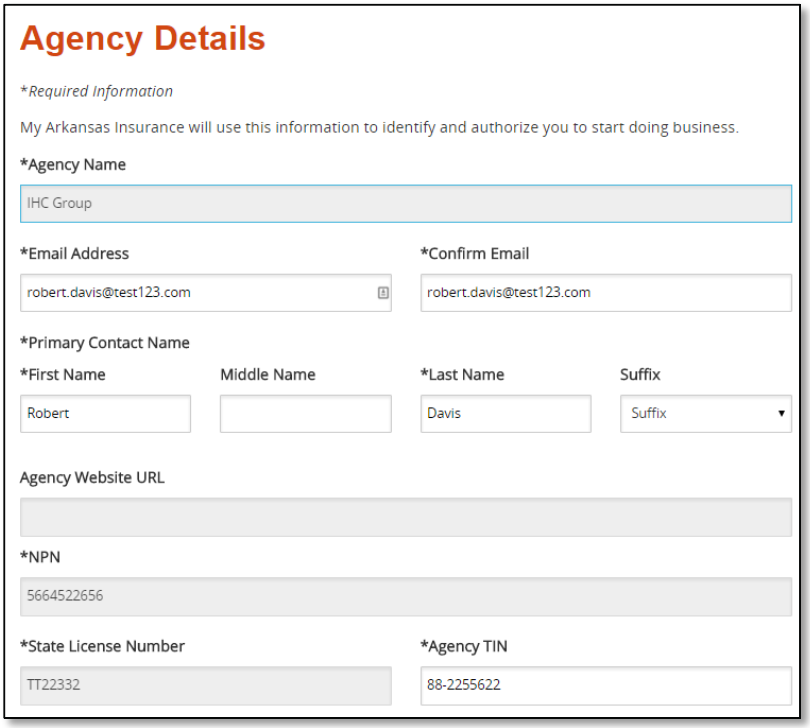


Figure 6. Agency Details

On the **Agency Details page**, enter the following information:

1. Agency Name
2. Email Address
3. Primary Contact Name
4. Agency Website URL
5. NPN
6. State License Number
7. Agency TIN
8. License Valid From and To Dates
9. Marketing and Outreach Information
10. Click **Save and Continue**.

3.3.2: Add Your Business Address

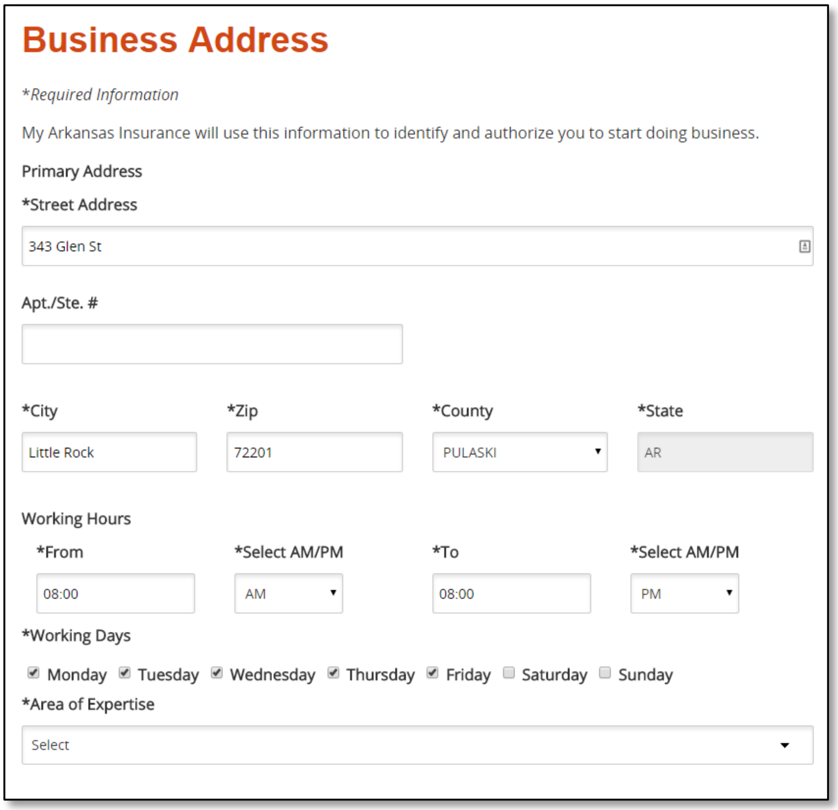


Figure 7. Business Address page

On the **Business Address** page, enter the following information:

1. Primary Street Address
2. Working Hours
3. Working Days
4. Area of Expertise

Click **Save and Continue**.

3.3.3: Add Your Communication Details

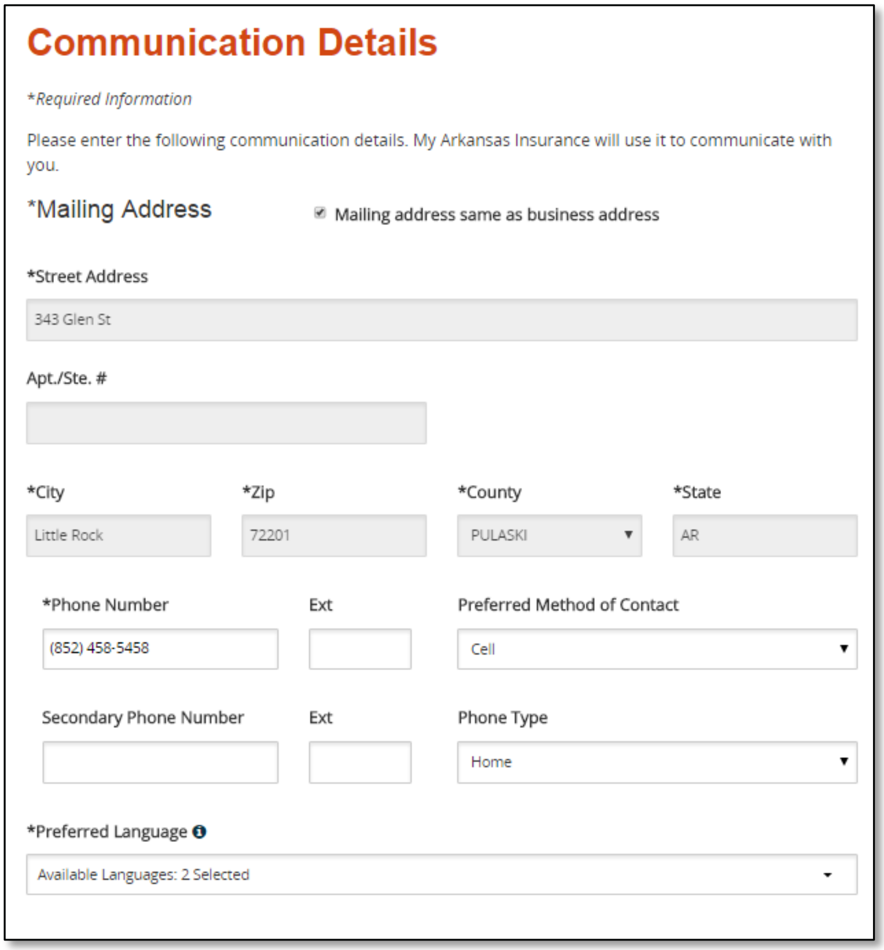


Figure 8. Communication Details

On the **Communication Details** page, enter the following information:

- Mailing Address
- Primary Contact Number
- Secondary Contact Number
- Preferred Language

Click **Save and Continue**.

3.4: Update Account Details

Once you have completed the Agency Details sections, your user account information is stored by the Agent Portal. You can review your user profile information in the My Account section.

To update your user account information, you must:

1. Sign in to the Agent Portal using your username and password created during registration.
2. Select your **My Account** from the top Navigation menu.
3. Edit profile information, if needed.

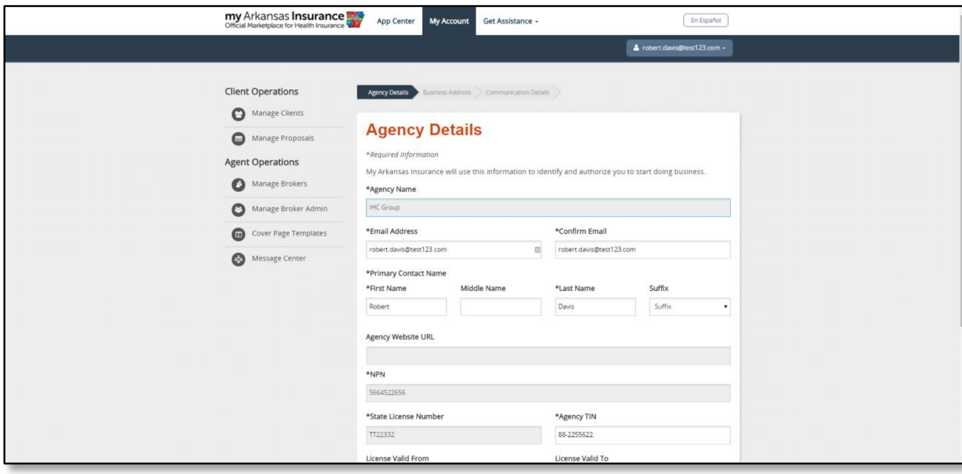


Figure 9. My Account menu

3.4.1: Changing Security Questions

You can use the **Change Security Questions** page to change the security questions and answers you provided during registration. You will be prompted to answer the security questions if you forget your password and need to reset it.

To update your security information:

1. Sign into the Agent Portal using your username and password created during registration.
2. Select your **Username** in the top right-hand corner.
3. Click **Change Password**.
4. Click **Change Security Questions.**
5. In the Security Question 1 field, select a question.
6. In the Security Answer 1 field, enter an answer.
7. In the Security Question 2 field, select a question.
8. In the Security Answer 2 field, enter an answer.
9. In the Security Question 3 field, select a question.
10. In the Security Answer 3 field, enter an answer.
11. Click **Save and Logout**.

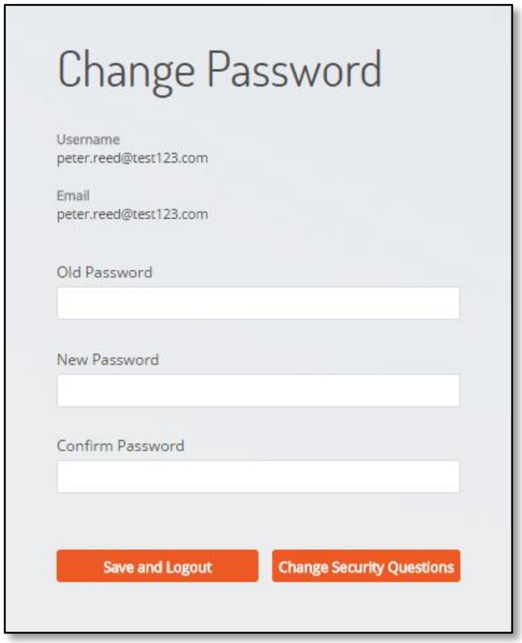


Figure 10. Change Password

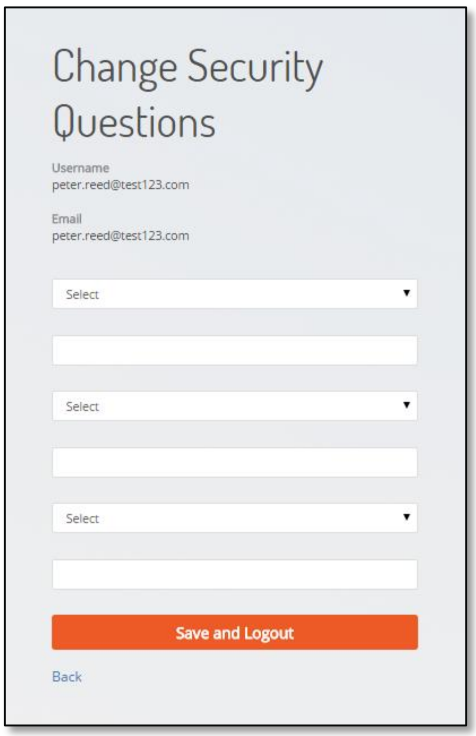


Figure 11. Change Security Questions

3.4.2: Resetting Your Password

You can use the Password page to change or reset your password.

To reset your password:

1. Sign into the Agent Portal using your username and password created during registration.
2. Select your **Username** in the top right-hand corner.
3. Click **Change Password**.

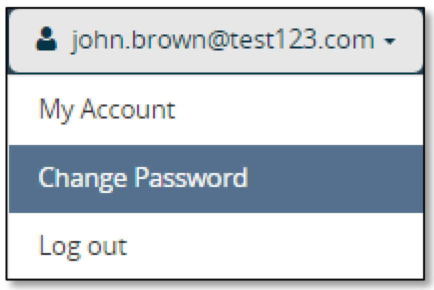


Figure 12. Welcome menu

4: Managing Clients

4.1: Introduction

The Manage Clients section of the Agent Portal enables you to manage your clients and perform the following activities:

- Add/Update Clients
- Send and manage plan proposals
- File an eligibility application and enrollment on behalf of your clients
- Enrollment employees
- Manage payments

To manage your employer clients, click **Manage Clients** from the left navigation menu.

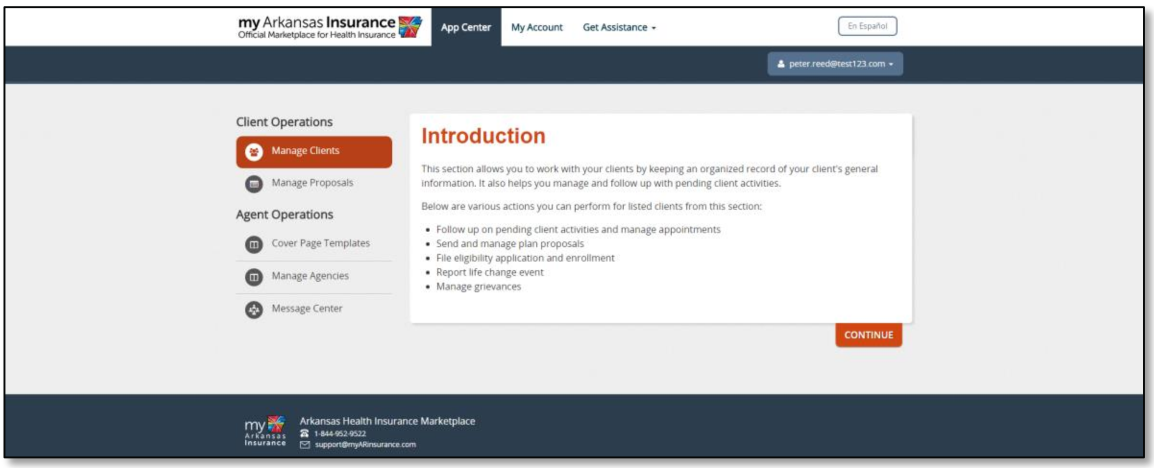


Figure 13. Manage Clients - Introduction page

4.2: Managing Clients

The Clients page enables you keep an organized record of your client's general information and helps you to manage and follow up with pending client activities.

To manage clients, you must first perform one of the following activities:

- Search for a client (with a profile on the Employer Portal)
- Add a new client (without a profile on the Employer Portal)

4.2.1: Searching for a Client

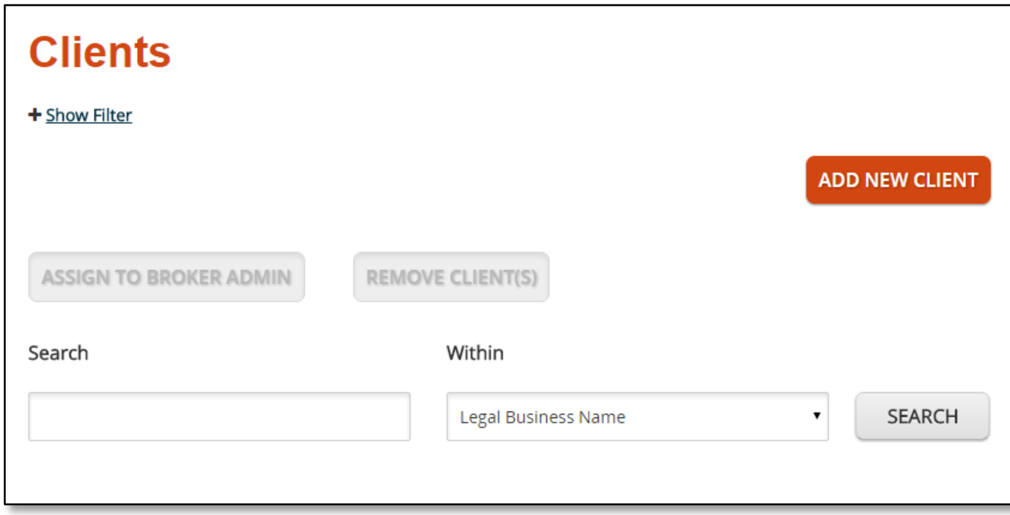


Figure 14. Clients page

To search a client:

1. On the Clients page, click **Add New Client.**
2. On the Search Client page, select the **Search New Client** radio button.
3. Enter either the client's **Account Number or Email Address**.
4. Click **Search**.

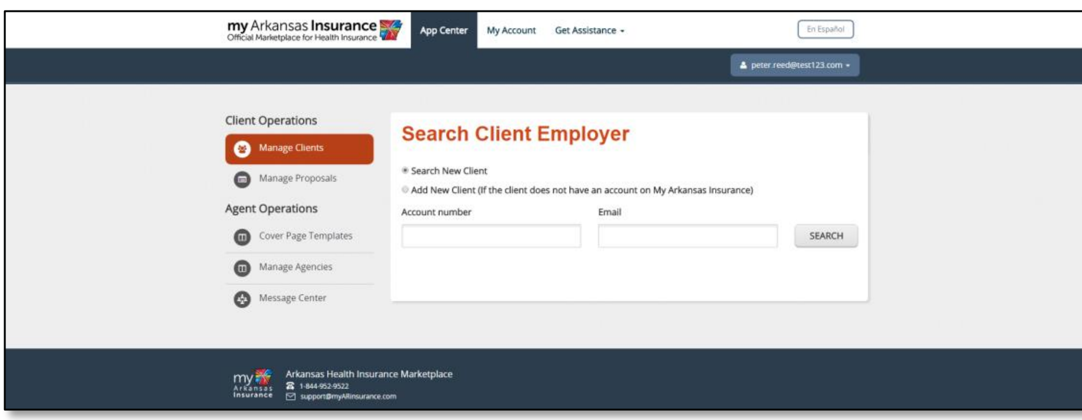


Figure 15. Search Client Employer page

5. Click **Select Client** next to the client you wish to manage.
6. On the Review Client page, click **Add Client**.

To add a client:

1. On the Clients page, click **Add New Client**.
2. On the Search Client page, select **Add New Client** radio button.
3. Click **Search.**

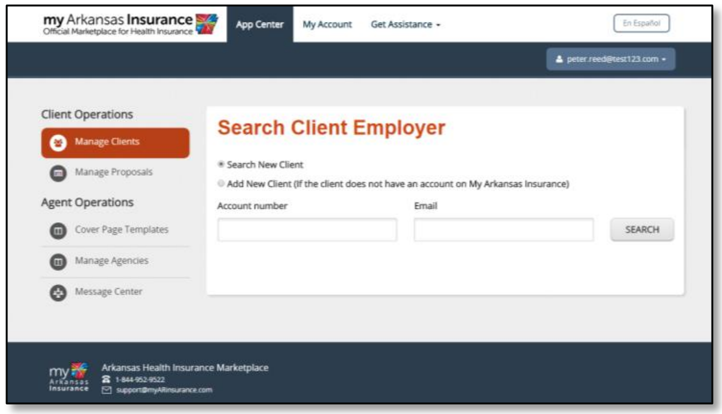


Figure 16. Search Client Employer page

4. Enter basic employer information:
   - Name
   - Company Name
   - Contact Address
   - Email
   - Preferred Language
   - Phone Number

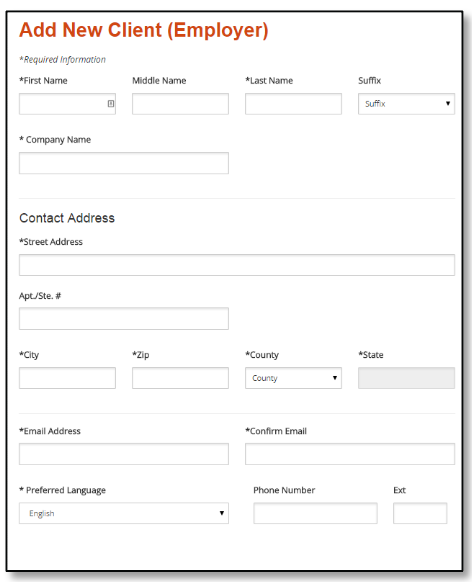


Figure 17. Add New Client (Employer) page

After searching or adding a client to your client list you can request authorization or manage proposals.

4.2.2: Assigning Client to Broker

To assign clients to Broker:

1. On the **Clients** page, click the checkbox next to the client and click **Assign to Broker**.

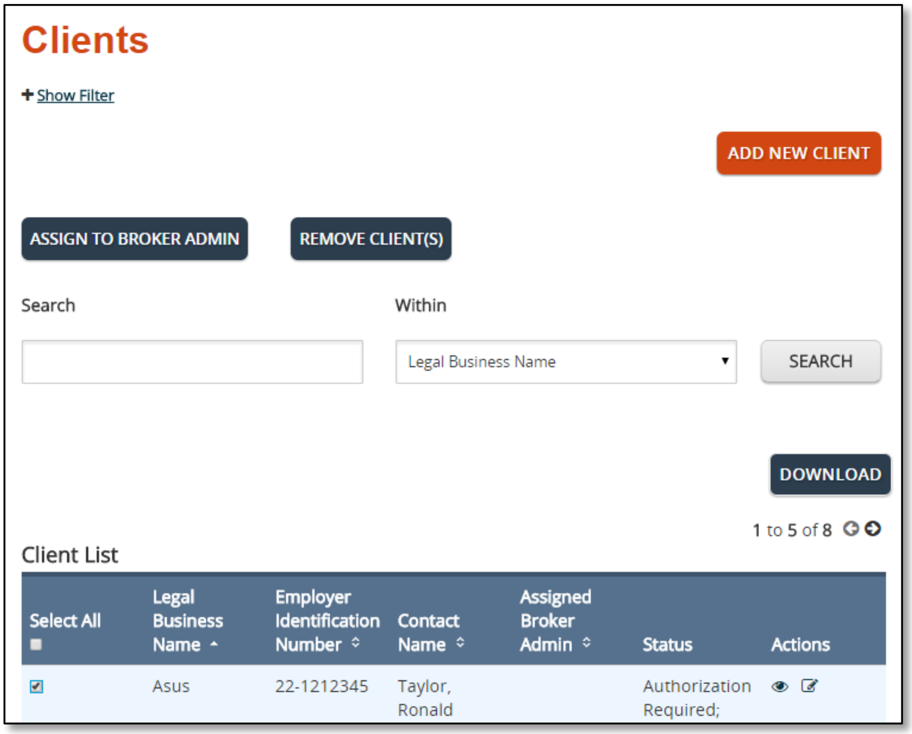


Figure 18. Clients page

4.2.3: Assigning Client to Broker Admin

To assign clients to Broker Admin:

2. On the **Clients** page, click the checkbox next to the client and click **Assign to Broker Admin**.

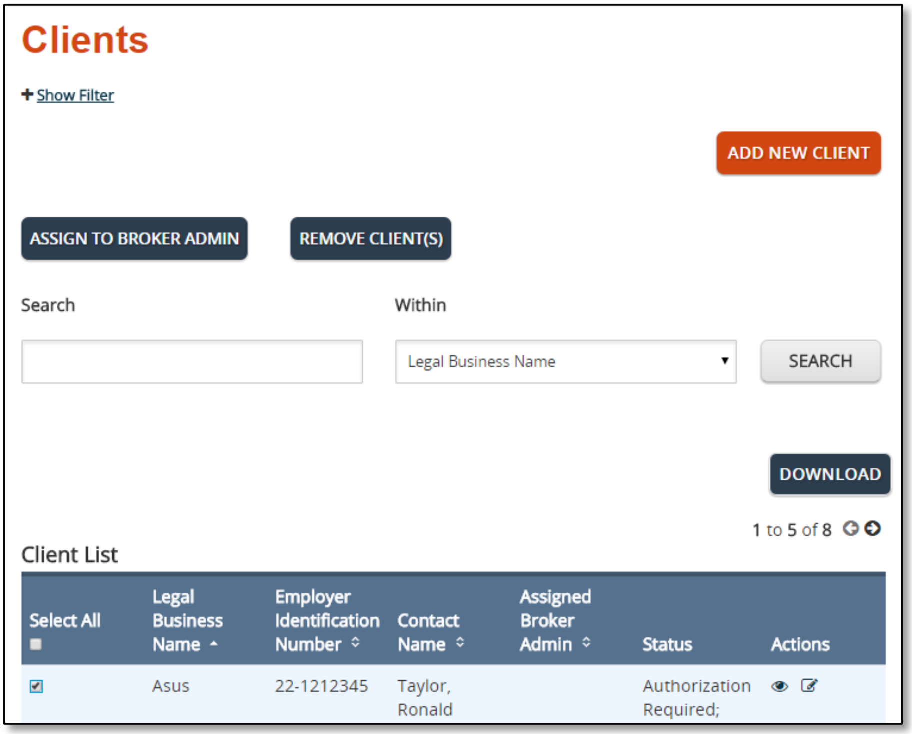


Figure 19. Clients page

4.2.4: Removing Client

To remove a client from your account:

1. On the Clients page, select the client check box.
2. Click **Remove**.

4.2.5: Viewing Client Details

To view client details:

1. On the Clients page, under the Actions column, click **View Client Details**.
2. On the Review Details (Employer) page, view your client's details.
3. Click **Previous** to return to the Clients page.

Figure 20. Review Details page

4.2.6: Editing Client Details

To edit client details:

1. On the Clients page, under the **Actions** column, click **Edit Client Details**.

2. On the Edit Client (Employer) page, update the client information.

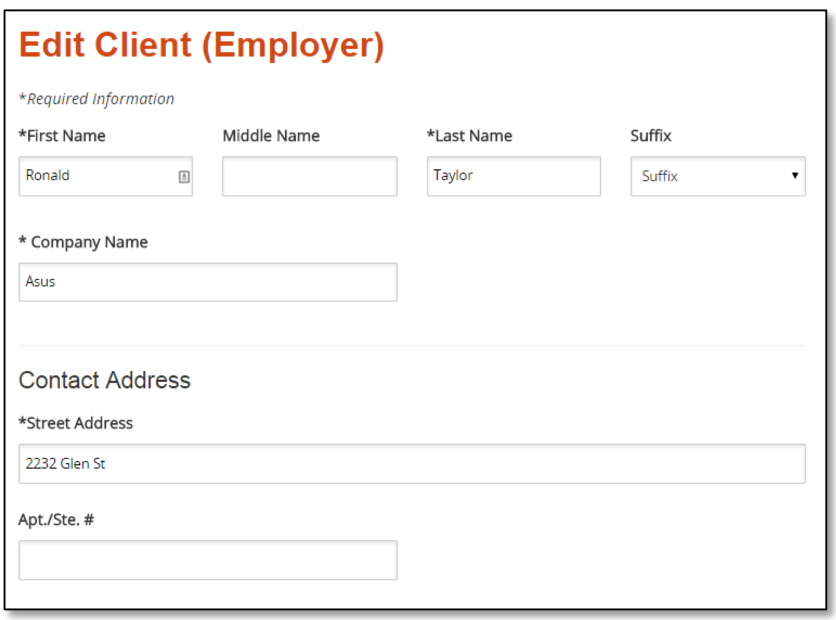


Figure 21. Edit Client (Employer) page

3. Click **Continue**.

   4. On the Review Details (Employer) page, review the details and click **Submit**.

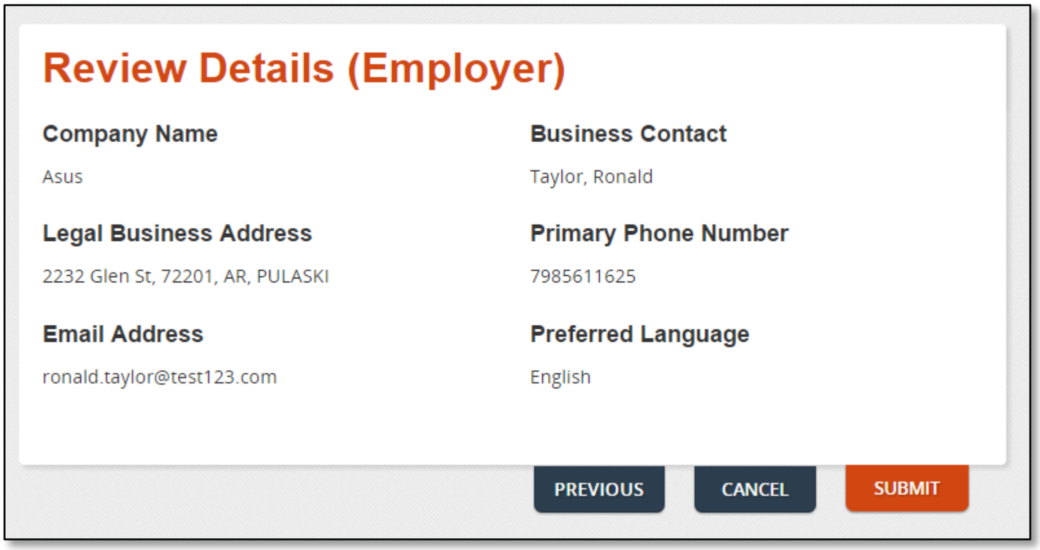


Figure 22. Review Details (Employer) page

5: Managing Client Operations

The Client Operations section of the Agent Portal enables you to perform the following activities for your employer clients:

- View Proposals
- View Client Profile
- Manage Authorization
- Manage Proposals

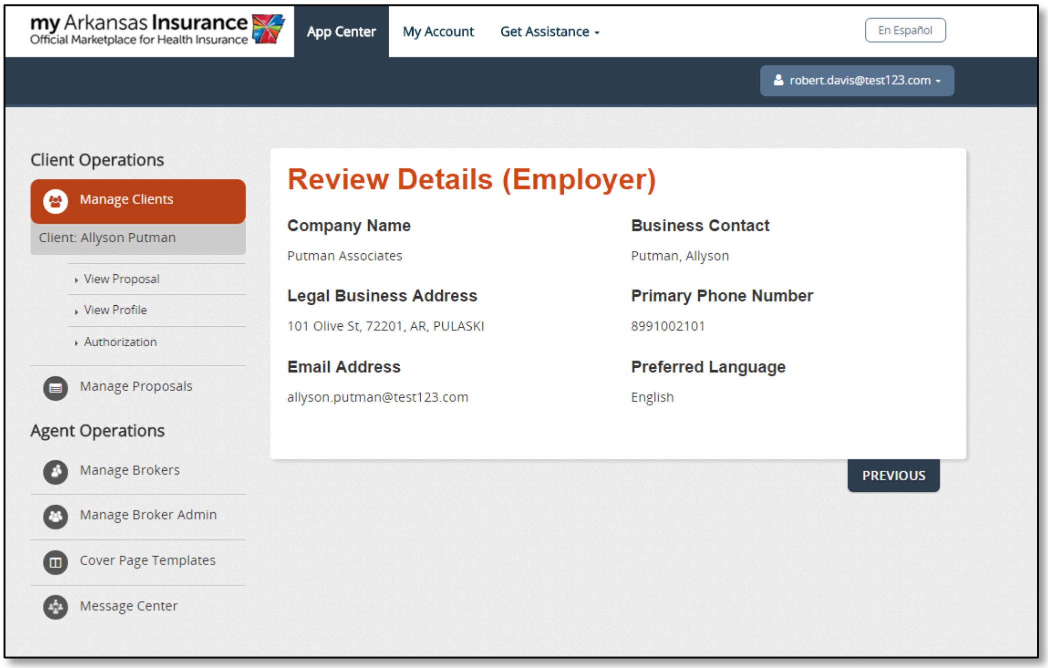


Figure 23. Client Operations

5.1: View Proposals

The Proposal List page enables Agencies to view proposals created by Brokers and Broker Admin.

- Agencies can view.
- Proposal Number
- Client Details
- Contribution Model
- Benefits
- Proposal Status
- Effective From Date
- View Proposal Details

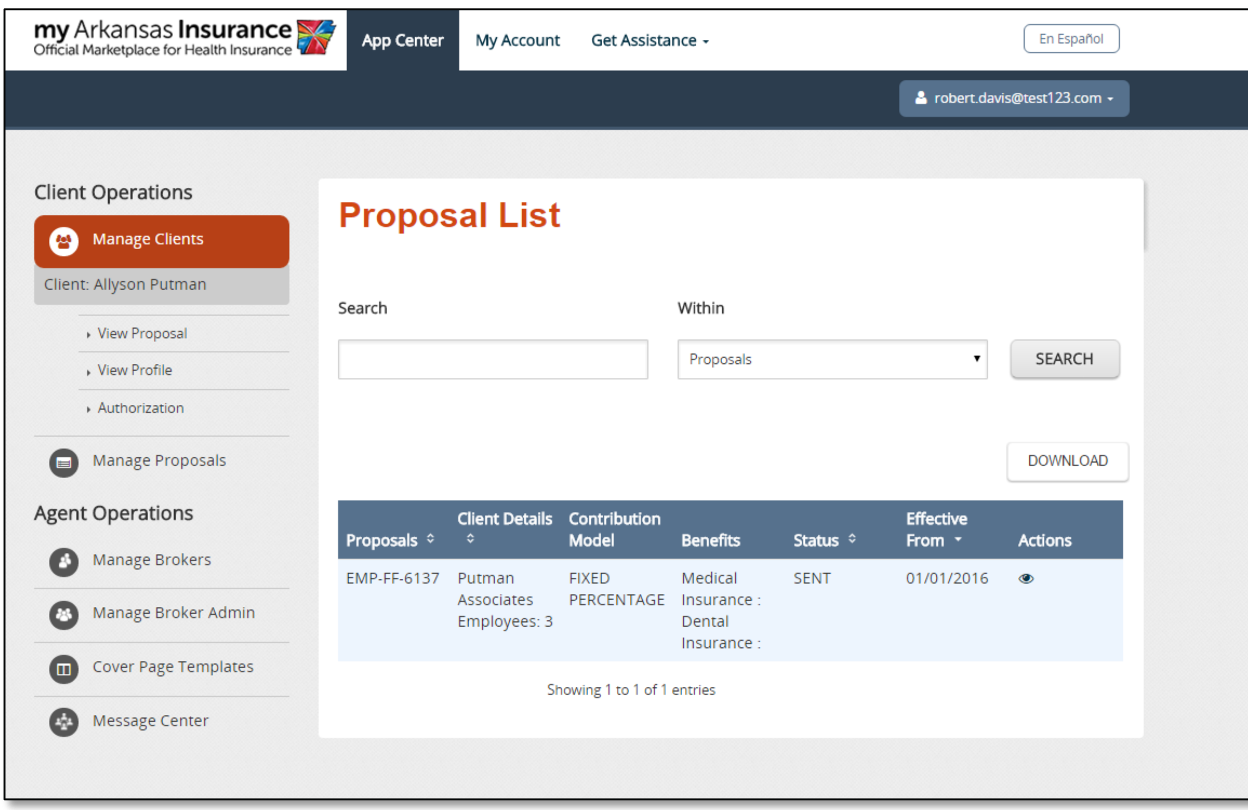
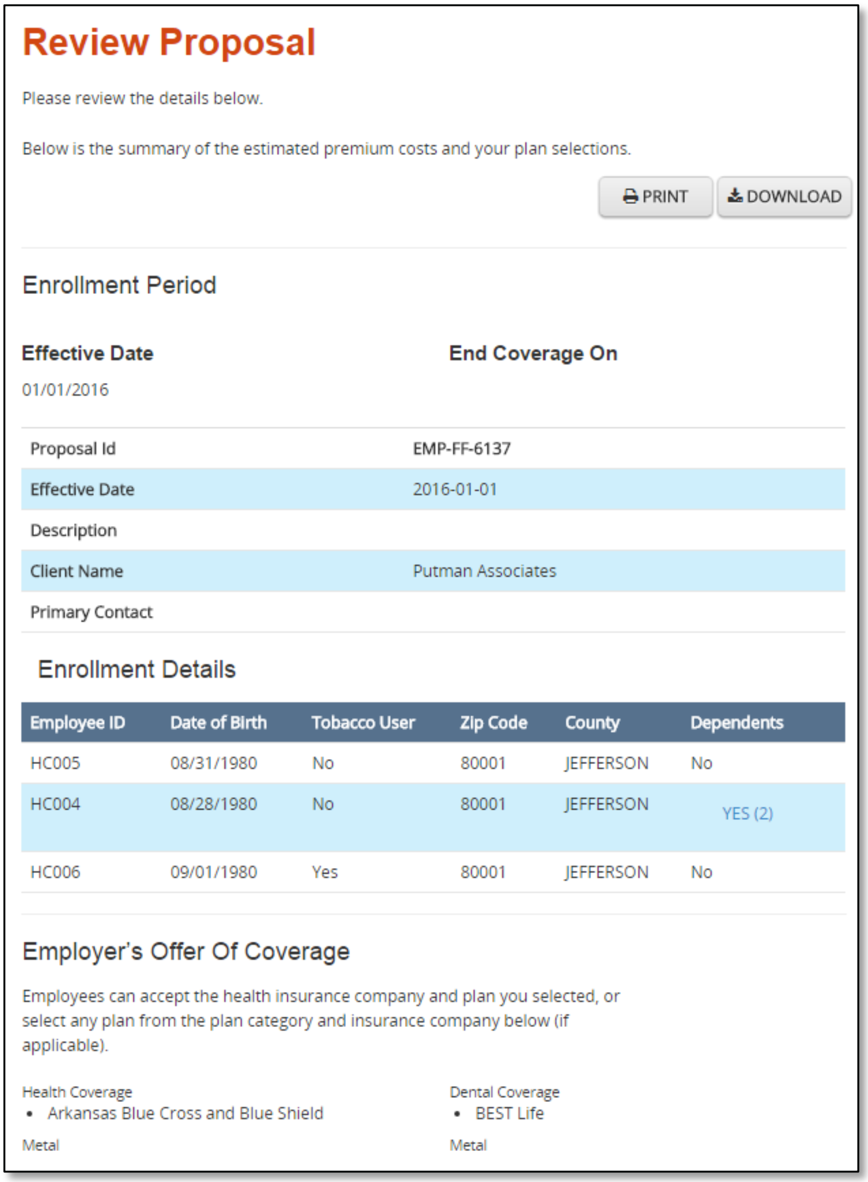


Figure 24. Proposal List page

To view proposal details:

1. Click **View Client Details** from the Actions column next to the client.



Review Proposal

Please review the details below.

Below is the summary of the estimated premium costs and your plan selections.

PRINT DOWNLOAD

Enrollment Period

Effective Date 01/01/2016

End Coverage On

Proposal Id	EMP-FF-6137
Effective Date	2016-01-01
Description	
Client Name	Putman Associates
Primary Contact	

Enrollment Details

Employee ID	Date of Birth	Tobacco User	Zip Code	County	Dependents
HC005	08/31/1980	No	80001	JEFFERSON	No
HC004	08/28/1980	No	80001	JEFFERSON	YES (2)
HC006	09/01/1980	Yes	80001	JEFFERSON	No

Employer's Offer Of Coverage

Employees can accept the health insurance company and plan you selected, or select any plan from the plan category and insurance company below (if applicable).

Health Coverage
- Arkansas Blue Cross and Blue Shield

Metal

Dental Coverage
- BEST Life

Metal

.

Figure 25. Review Proposal

5.2: View Client Profile

The My Profile page enables Agencies to view the profile information of clients.

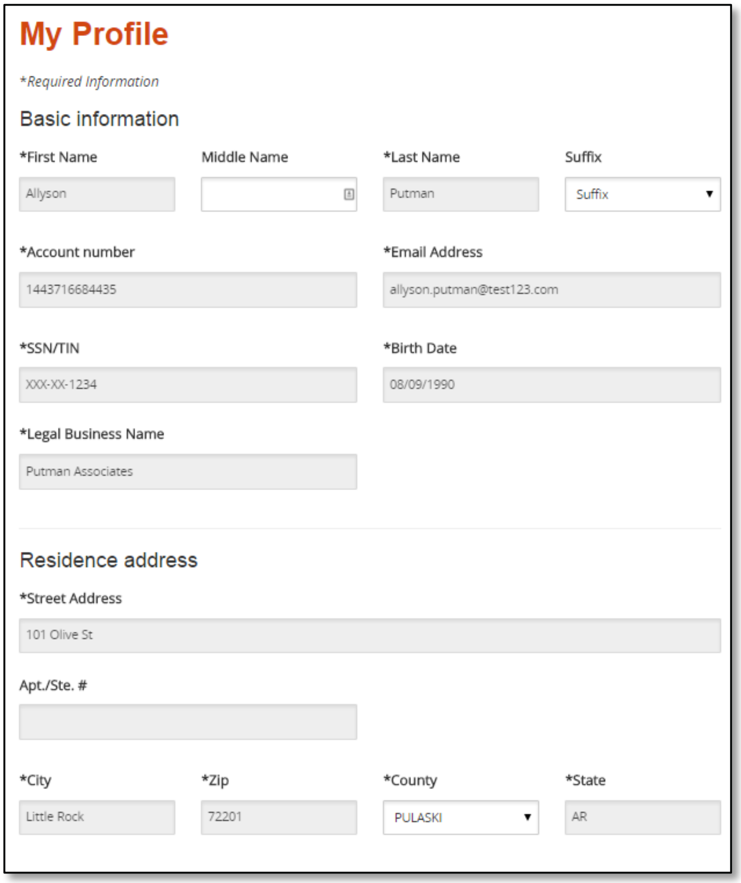


Figure 26. My Profile

5.3: Managing Authorization

The Authorization section enables Agencies to assign clients to Brokers and Broker Admin to manage authorization for your clients. It keeps an organized record of your client's authorization and enables you to view, approve, or reject authorizations.

To assign a client to a Broker:

1. From the Manage Clients page, click the **checkbox** next to the client.
2. Click **Assign to Broker**.

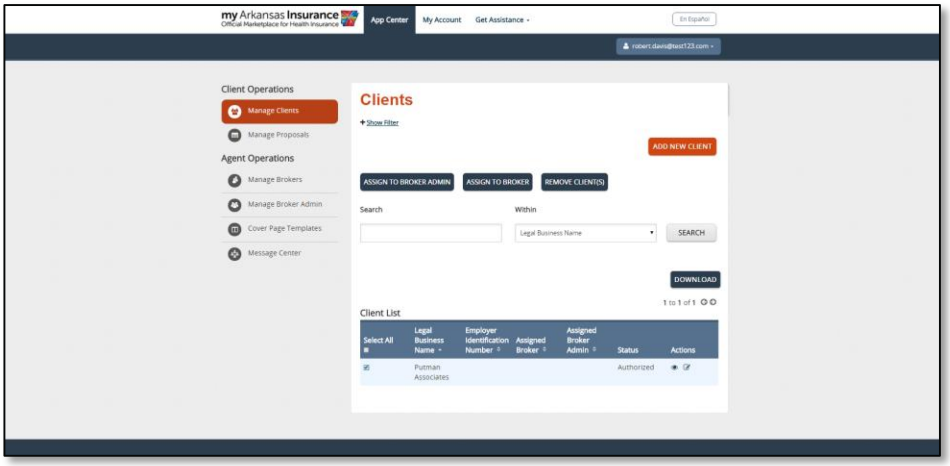


Figure 27. Clients page

3. From the Assign to Broker page, click **assign** icon next to the Broker.

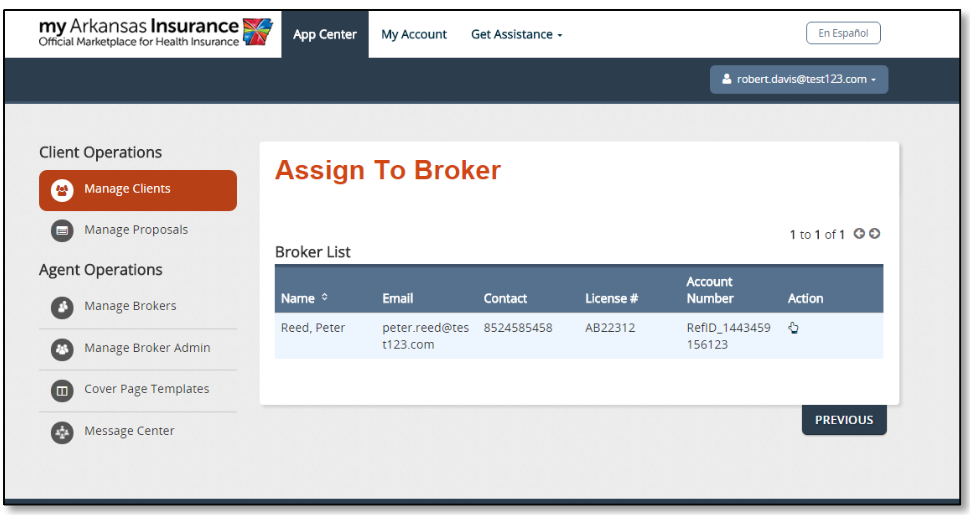


Figure 28. Assign to Broker page

4. From the Review Assign Clients page, click **Assign Clients**.

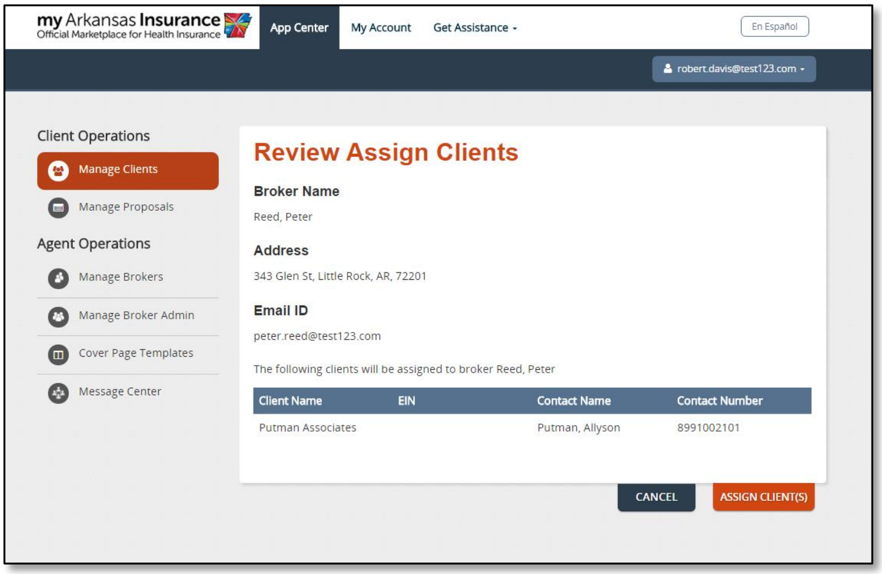


Figure 29. Review Assign Clients page

5. Click **Continue**.

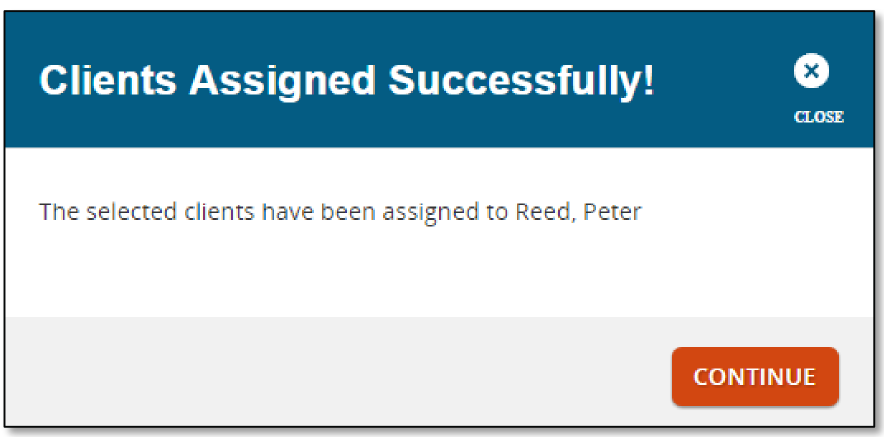


Figure 30. Clients Assigned Successfully

To assign a client to a Broker Admin:

1. From the Manage Clients page, click the **checkbox** next to the client.
2. Click **Assign to Broker**.

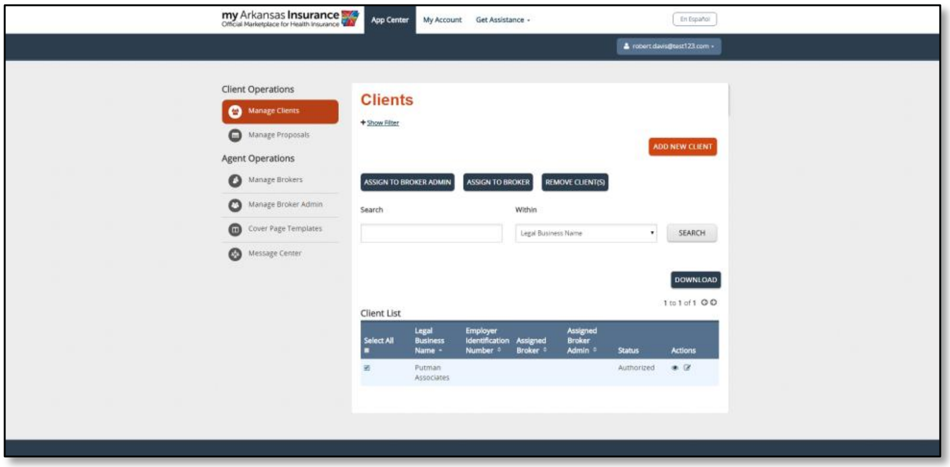


Figure 31. Clients page

From the Assign to Broker page, click **assign** icon next to the Broker.

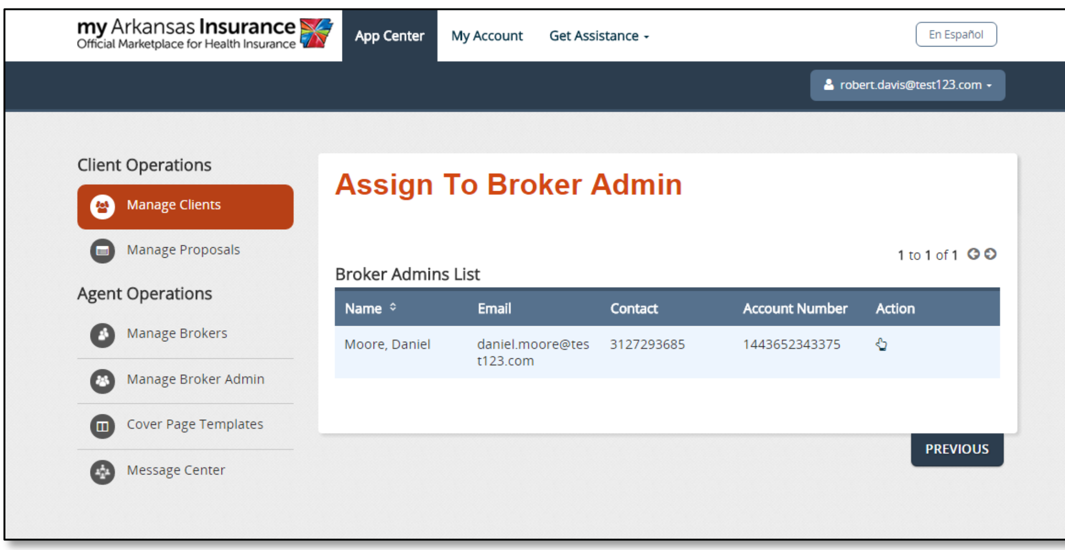


Figure 32. Assign to Broker Admin

5.4: Manage Proposals

The Manage Proposals page enables you to view proposal activity for all clients. You can perform the following activities:

- Search proposals
- View proposals
- Download proposal

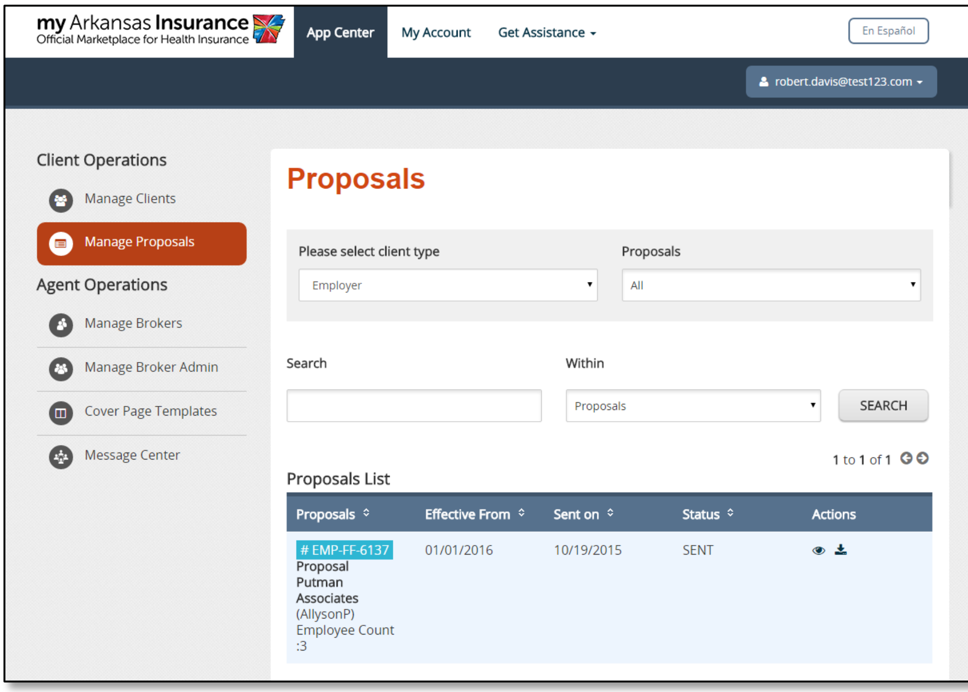


Figure 33. Proposals page

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