

Broker Portal User Guide

2026



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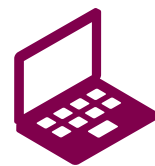
Welcome!

Welcome to the Broker Portal User Guide, a tool you can use to quickly navigate the secure Broker Portal website for more efficient and accurate support of your clients, and better management of your book of business. Use this Broker Portal User Guide as a reference for how to perform a variety of functions to help you manage products across Centene, including Centene-owned companies (such as Health Net). This manual also explains the many ways to use the website and maximize its functionality to strengthen your business. Once you register and create an account, you can easily access information across multiple lines of business:

The portal supports your CA IFP/Marketplace, CA Medicare Supplement, and CA/OR Commercial Group client base.

- Viewing active, inactive and pre-effectuated clients.
- Viewing your commission statements.
- Viewing your IFP/Marketplace and Medicare Supplement clients' application status.
- Supporting your group business' needs.
- Checking the medical eligibility status of a client.

We're confident this Broker Portal User Guide will act as a helpful reference you can turn to again and again for your selling success!



System Requirements

Access the secure broker website using Microsoft Edge, Firefox and/or Google Chrome. Each browser should be updated to the most recent version available for optimal performance. The portal is designed to be mobile-responsive and thus available to use on a mobile device such as a phone or tablet.

Registration

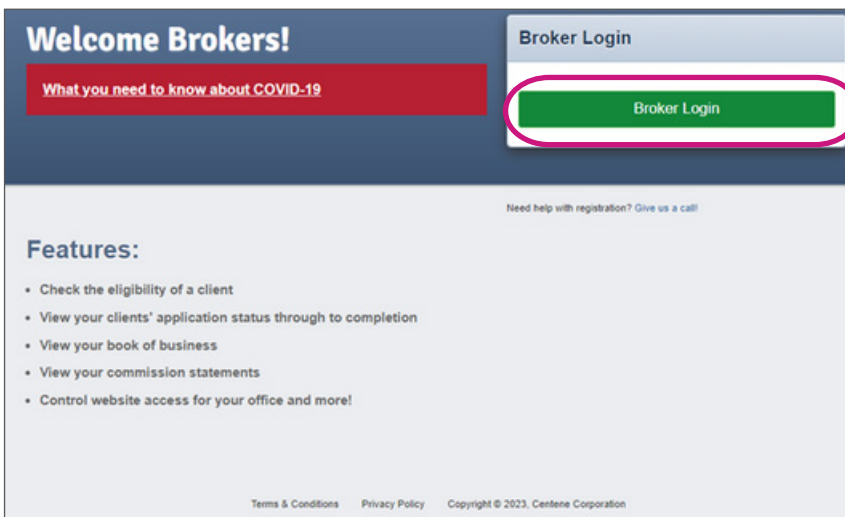
Registration is a process you can initiate. Before you attempt to register for the website, the following items must be in place:

- You must be actively contracted with Centene/Health Net and have an active license.
- You must not have more than one contracting record with the same email address.
- You must have a National Producer Number (NPN) and Tax ID/Social Security Number.

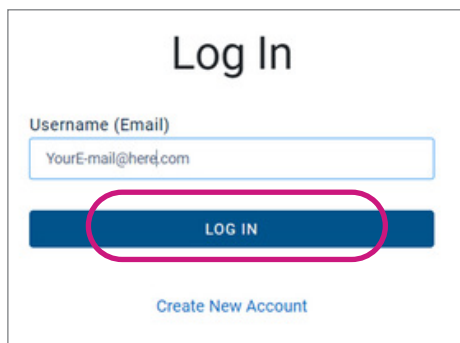
To start registration, navigate to the Broker portal page:
<https://broker.brokersecureportal.com>.

Broker portal page may also be accessed through HealthNet.com/
HealthNetOregon.com > Brokers > Broker Portal Log in

Click the **Broker Login** button.



- You will be taken to the EntryKeyID login page.
- If you have not yet created an EntryKeyID, click the **Create New Account link**.
- Enter your email address.
 - Preferably, this will match the email you used to contract with Health Net/Centene and click **Log In**.



Can't find your NPN or need a reminder?

Visit [National Insurance Producer Registry \(NIPR\)](https://www.nipr.org) website and look it up by your SSN, Broker License number or Agency Federal Employer ID Number (FEIN).

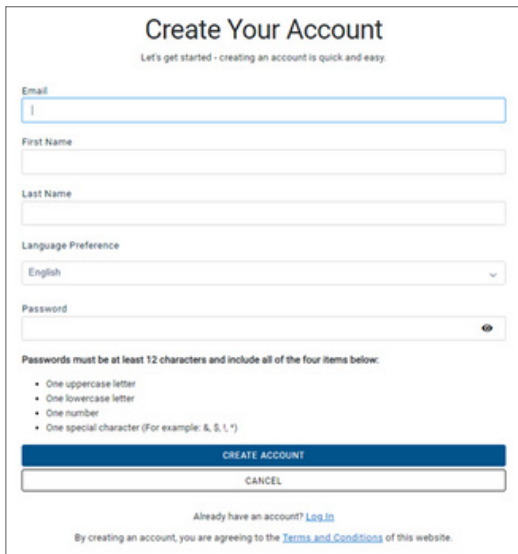
Login for the Broker Portal can also be referred to as EntryKeyID.

Existing Users

If you already have an ID, use that in to log in, and skip the steps for creating an ID.

If the system recognizes that this is not a user with an account, it will take you to the **Create Your Account page**.

- Enter the information and click **Create Account**.
- You will get a confirmation page.
 - You may wish to keep this page open until you confirm receipt of the email.



The screenshot shows a 'Create Your Account' form with the following fields and options:

- Email:** A text input field.
- First Name:** A text input field.
- Last Name:** A text input field.
- Language Preference:** A dropdown menu currently set to 'English'.
- Password:** A text input field with a toggle for visibility.

Below the password field, there is a note: "Passwords must be at least 12 characters and include all of the four items below:"

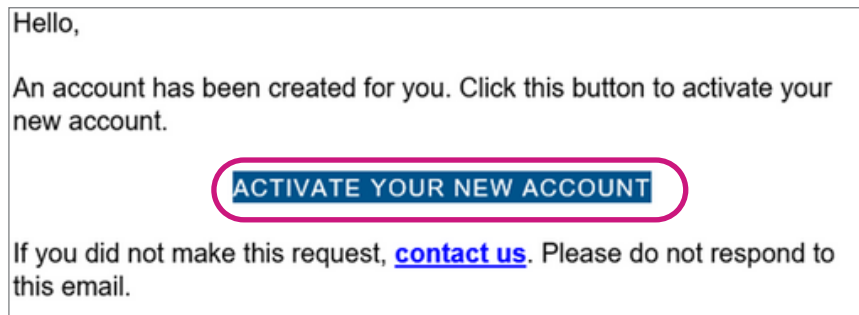
- One uppercase letter
- One lowercase letter
- One number
- One special character (For example: &, \$, !, *)

At the bottom of the form are two buttons: "CREATE ACCOUNT" (highlighted in blue) and "CANCEL".

Below the form, there is a link: "Already have an account? [Log In](#)".

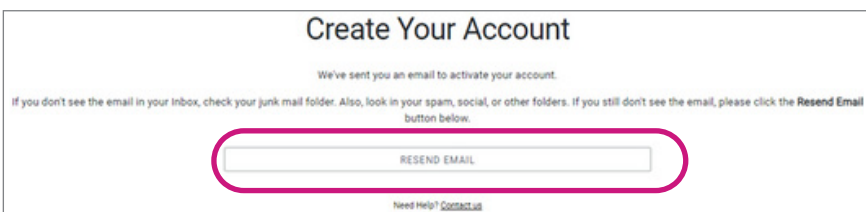
At the very bottom, a small note reads: "By creating an account, you are agreeing to the [Terms and Conditions](#) of this website."

Check your email inbox for the email from EntryKeyID and click the link within the email to activate the account.

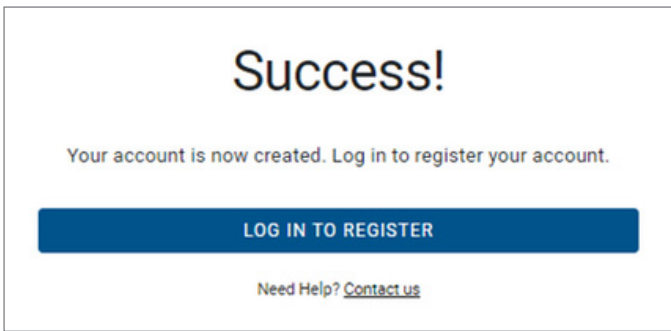


If you do not see the email immediately:

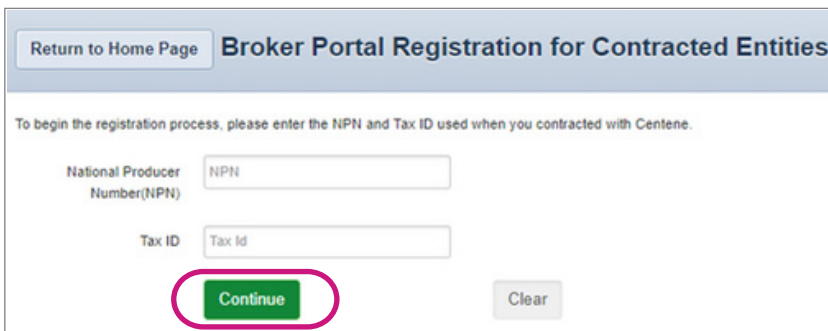
- Check your Spam folder.
- Check your Quarantine folder (if applicable).
- Wait a few minutes and refresh.
- Resend the email from EntryKeyID (noreply@mail.entrykeyid.com).



Upon activating your account, you will see the following success message.



- Navigate back to the Broker portal page: <https://broker.brokersecureportal.com>.
- Click **Broker Login**. You will be asked to login to your 'EntryKeyID' user account. Use the email and password you just set up here.
- You will be taken to the portal registration page.
- Enter your National Producer Number (NPN) and tax ID
- Click **Continue**.



A screenshot of the "Broker Portal Registration for Contracted Entities" page. At the top left is a "Return to Home Page" link. The main heading is "Broker Portal Registration for Contracted Entities". Below the heading, a message states: "To begin the registration process, please enter the NPN and Tax ID used when you contracted with Centene." There are two input fields: "National Producer Number(NPN)" and "Tax ID". Below these fields are two buttons: a green "Continue" button and a grey "Clear" button. The "Continue" button is circled in red.

- Your information will be extracted from the contracting system, including your email.
- One of two screens shown below, will be presented:
 - This will depend on if you used the SAME email – or DIFFERENT email than what is in our contracting system.



A screenshot of the "Broker Portal Registration for Contracted Entities" page showing search results. At the top left is a "Return to Home Page" link. The main heading is "Broker Portal Registration for Contracted Entities". Below the heading, a message states: "The broker account listed below matches the search criteria you have entered. If this is the broker you wish to register, please click the Send Email button. If this is not the correct broker, please try your search again." Below this message is a table with the following columns: EMAIL, LAST NAME, FIRST NAME, TAX ID, NPN, STATES APPOINTED, STATUS, and CREATE DATE. The table contains one row of data. To the right of the table is a green "Send Email" button, which is circled in red.

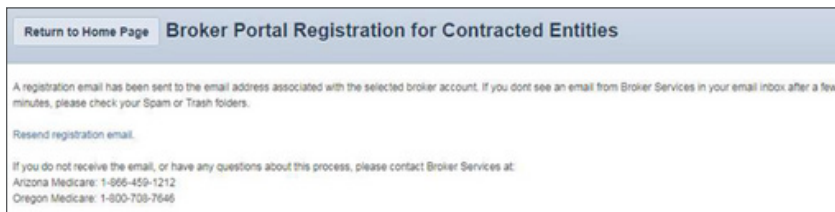
EMAIL	LAST NAME	FIRST NAME	TAX ID	NPN	STATES APPOINTED	STATUS	CREATE DATE
					CA	ACTIVE	Wed Sep 08 18:06:12 CDT 2021



A screenshot of the "Broker Portal Registration for Contracted Entities" page showing a matched account. At the top left is a "Return to Home Page" link. The main heading is "Broker Portal Registration for Contracted Entities". Below the heading, a message states: "You are logged in as (email-1@gmail.com). That email address is the same as the one in the broker contracting system." Below this message, it says "This account matched your search." and provides two options: "Click **Submit** to register this broker account, or" and "Try your search again with different criteria." Below this is a table with the same columns as the previous screenshot. The table contains one row of data. To the right of the table is a green "Submit" button, which is circled in red.

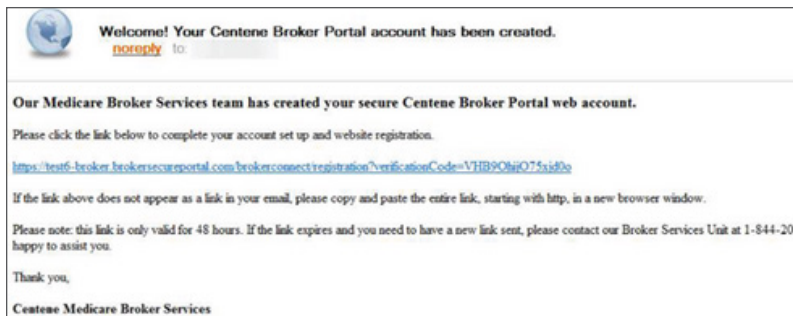
EMAIL	LAST NAME	FIRST NAME	TAX ID	NPN	STATES APPOINTED	STATUS	CREATE DATE
					CA	ACTIVE	Fri Aug 27 08:06:48 CDT 2021

Regardless of which scenario and screen is presented, click the button.



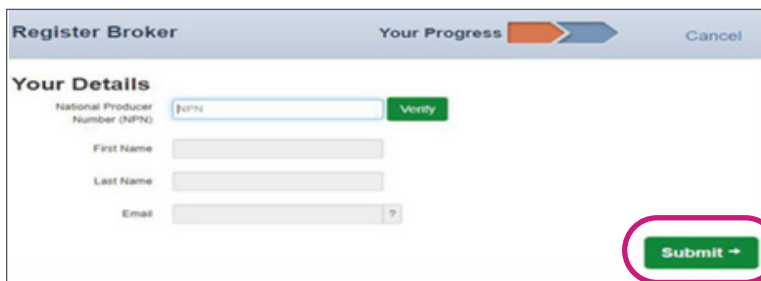
- If you used the **same email** as found in the contracting system, your portal account should be registered.
- If you used a **different email** as found in the contracting system, check your contracting email's inbox and click the link to complete your registration.

Sample email:



Complete your registration and click Submit when done

- The link you click from the email will take you here:



If you do not see the verification email in your inbox: Please check your junk or spam email folder.

Enter the following information:

- Enter your NPN
- Click Verify and the following information should be filled in:
- First name (if a broker/agent web account)
- Last name (if a broker/agent web account)
- Email address used to create the account

If the account being created is an Agency/Upline account, then the first and last name fields will not auto populate.

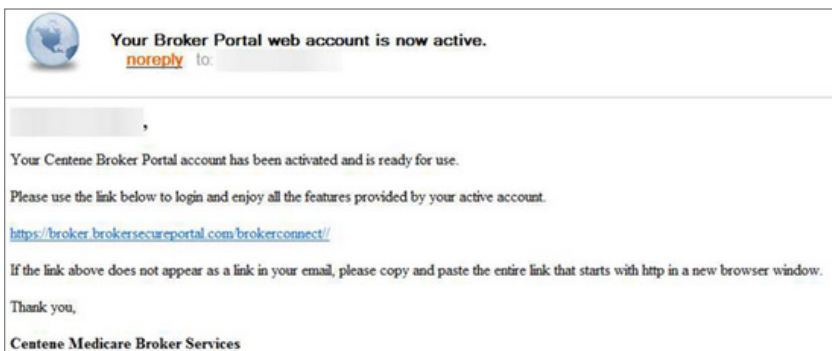
Enter the following:

- First Name (if an Agency/Upline web account)
- Last Name (if an Agency/Upline web account)

Log in when you get your account confirmation.



You will receive an email confirming your account has been successfully created.

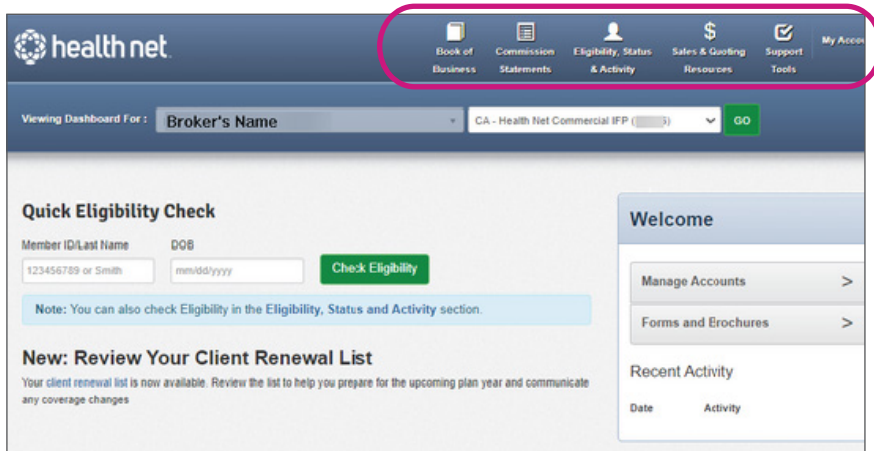


Overview of the Broker Portal

Site Navigation/The Dashboard

Once signed in, you will be directed to your Dashboard home screen.

- Below the site navigation is the dashboard.
- The dashboard will change slightly based on the type of web account you have.



Clicking the Health Net logo on the top left on any page will return you to the home screen.

Navigation Options

- Book of Business
- Commission Statements
- Eligibility, Status, & Activity
- Sales & Quoting Resources
- Support Tools
- My Account

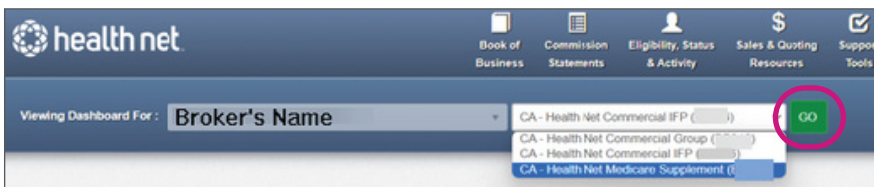
Broker/Selling Agent Accounts

If you have a broker / selling agent or broker office staff web account (as determined by the type of account in the contracting system), the dashboard shows you the following information:

- Name and national producer number (NPN)
- Your primary state/plan
- Any additional states/plans available to you

When logging in, the state/plan defaults to the primary state/plan selected, and can be changed in the **My Account** section.

- To change the state/plan selected, click the drop-down and select a different option
- Click **Go**.



If you are a Health Net broker, you will see your corresponding legacy broker ID in parenthesis next to each state/plan to indicate which broker ID your client data is associated. This ID can be the same or different for each state/plan.

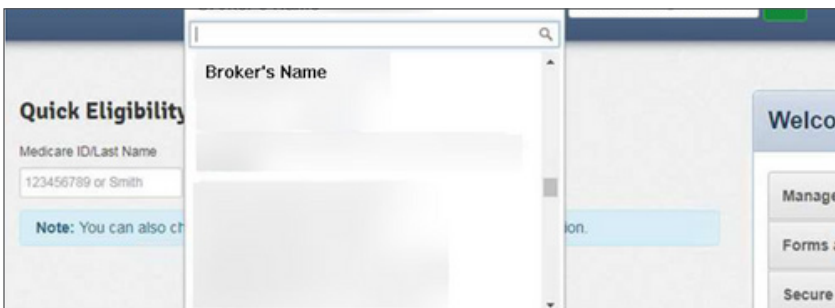
Agency /Upline Accounts

If you have an Agency / Upline or Agency / Upline office staff web account (as determined by the type of account in the contracting system), the dashboard shows you the following information:

- Your name and national producer number (NPN)
- Your primary state/plan
- Any additional states/plans available to you

When logging in, the state/plan defaults to the primary state/plan selected, and can be changed in the **My Account** section.

- To change the state/plan selected, click the drop-down and select a different option
- Click **Go**.

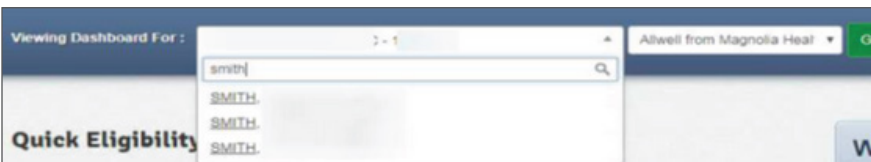


In addition to this information, if you have downstream affiliated brokers (as linked in the contracting system by NPN), you can click the left hand drop-down and view the list of those affiliated brokers.

- You can also type in their NPN or name into the search box to find them more easily.

When you select one of your downstream affiliated brokers, the state/plan drop-down on the right will populate with that broker's state/plan information.

- Any page you view from there will display that broker's client information



You only need one account to manage all of your health plan business across states.

- Once you create a secure account, all IFP Commercial products (IFP and Group) as well as Medicare Supplement will be added for you. An identifier (e.g., NPN, legacy HealthNet Broker ID) must be affiliated to your members in the source systems for the member data to appear.
- If a member is missing – contact your Broker Services Unit representative for assistance.

If you are a Health Net broker, you will see your corresponding legacy broker ID in parenthesis next to each state/plan to indicate which broker ID your client data is associated. This ID can be the same or different for each state/plan.

Book of Business – IFP/Marketplace & Medicare Supplement

Overview

The Book of Business tool allows you to view your non-group client base for the selected state/plan in your dashboard. The tool has a variety of lists available, depending on the line of business:

- Active Member list
- Suspended Member list
- Cancelled Member list
- Pre-Members list (applicable to all Medicare Supplement plans)
- On-exchange Pre-members (applicable to IFP Commercial plans)
- Off-exchange Pre-members (applicable to IFP Commercial plans)

Active Member List

To view your Book of Business Active Member List:

- Click **Book of Business** tab at the top of the screen. You will be prompted the following page:

The screenshot shows the Health Net dashboard with the 'Book of Business' tab selected. The page displays a table of active members. The table has the following columns: Member Name, ID Number, Plan Name, Orig Enroll Date, Plan Eff Date, and Alerts. The data rows are as follows:

Member Name	ID Number	Plan Name	Orig Enroll Date	Plan Eff Date	Alerts
Member's Name	ID Number	Silver 87 Ambetter HMO		01/01/2023	
Member's Name	ID Number	Silver 87 Ambetter HMO		07/01/2023	
Member's Name	ID Number	Silver 94 Ambetter HMO		01/01/2023	
Member's Name	ID Number	Silver 94 Ambetter HMO		01/01/2023	
Member's Name	ID Number	Silver 87 Ambetter HMO		07/01/2023	
Member's Name	ID Number	Silver 73 Ambetter HMO		02/01/2023	

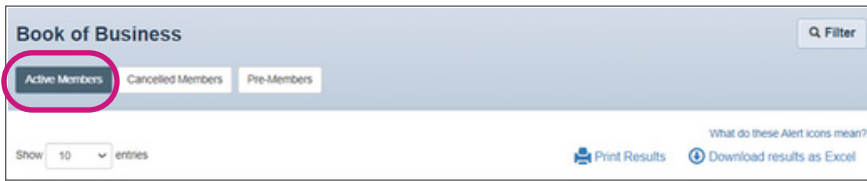
A broker-client relationship must exist in the source systems for a member to show on a Broker's book of business.

The Active Members will be the default landing page and details the following information:

- Member Name
- Member ID (may be a U# or R#)
- Plan Name
- Original Enrollment Date

If you are licensed in more than one state, to view an Active list in a state/plan other than the primary state/plan shown in the dashboard, you must change the currently selected state/plan

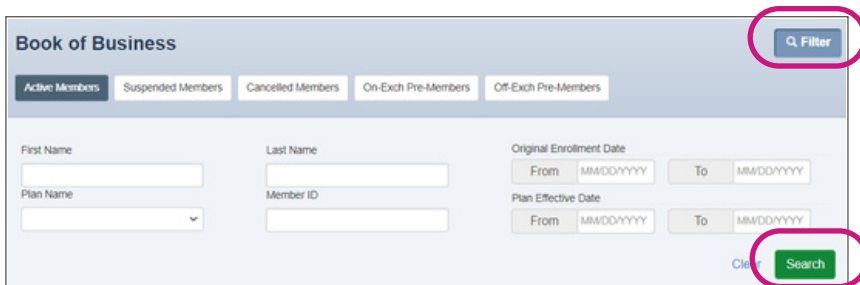
- Click **Go**.



Filtering Your Active List

To filter the list to find a specific member:

- Click the Filter button.
- This will expand the filter criteria allowing the user to search within that line of business by multiple criteria.
- Once the data is entered, click Search to initiate the filtering.



Other features on the page include:

- The ability to show 10, 25, 50, or 100 entries per page (the default is 10).
- The ability to print the list results.
- The ability to download the list results to Excel.
- Filter on the search results.
- View what each Alert icon means.

By expanding the filter criteria, a user is able to search within that line of business for:

- Member Name
- Member ID
- Plan Name
- Original Enrollment Date (a range)
- Plan Effective Date (a range)

Status

There are a few status options that can be displayed for each member. These include:

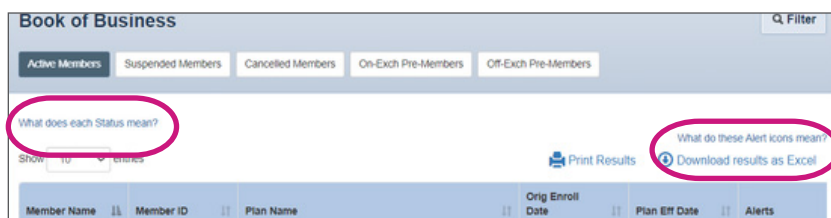
Status	Description
Active Members	Active Enrollment for both On and Off Exchange
Suspended Members	On Exchange member is behind on their payment by more than 30 days. Member is not eligible for services.
Cancelled Members	Enrollment was terminated never effective or after being active for a period of time. Termination was requested by member or due to non-payment. For both On and Off Exchange.
On-Exch Pre-Members	Awaiting binder payment to activate member
Off-Exch Pre-Members	Application is pending due to one or more reasons. Common reasons include pending binder payment, need proof of residency, incomplete application, need SEP documents, or queued for processing.

Alerts

There are a handful of alerts that can be displayed for each member, and these are represented by different icons. These include:

Alert	Definition
 65	Aging out (Member approaching Medicare eligibility)
 26	Aging Out (Dependent approaching age out of parental coverage)
	Delinquent payment

- To access the above-referenced Status and Alert definitions, clicking on “What does each Status Mean?” and/or “What do these Alert Icons mean?” links:



The screenshot shows the 'Book of Business' interface with a search filter. Below the search bar, there are tabs for 'Active Members', 'Suspended Members', 'Cancelled Members', 'On-Exch Pre-Members', and 'Off-Exch Pre-Members'. Two links are circled in red: 'What does each Status mean?' and 'What do these Alert icons mean?'. Below these links, there are 'Print Results' and 'Download results as Excel' buttons. At the bottom, a table header is visible with columns: Member Name, Member ID, Plan Name, Orig Enroll Date, Plan Eff Date, and Alerts.

Status Options displayed for each member:

- Active Members
- Suspended Members
- Cancelled Members

Alert Options displayed for each member:

- Aging Out (Member approaching Medicare eligibility)
- Aging Out (Dependent approaching age out of parental coverage)
- Delinquent Payment

View Active Member Details

The Member Name in the Active Member List is hyperlinked and clickable.

- To view a member’s details, click on the Member Name.
- Additional details will be available in multiple tabs

Member Name	Member ID	Plan Name	Orig Enroll Date	Plan Eff Date	Alerts
Member's Name	ID Number	Silver 70 Ambetter HMO		01/01/2023	
Member's Name	ID Number	Silver 94 Ambetter HMO		01/01/2023	
Member's Name	ID Number	Silver 87 Ambetter HMO		01/01/2023	
Member's Name	ID Number	Silver 87 Ambetter HMO		07/01/2023	

Overview Tab

The Overview tab will display the following information about that member:

Plan Details Tab

The Plan Details tab will display the following information about that member:

Member Details available in multiple tabs:

- Overview (default)
- Plan details
- Dependents (if a Commercial IFP plan)
- Current invoice (if data is available)
- Payment history (if data is available)
- ID Card (if a Commercial IFP plan)

Overview Tab Information:

- Member ID
- Physical Address
- County
- Date of Birth
- Age
- Home Phone Number
- There is also a section for PCP Information (if applicable)

Plan Details Tab Information:

- Status
- Plan Name
- Original Effective Date
- Plan Effective Date
- Eligibility End Date (if applicable)

Dependents Tab

The Dependents tab will display the following information about any dependents or family members associated to that member:

Return to Active Members		Member's Name					
Overview	Dependent Details						
Plan Details	NAME	RELATION	ADDRESS	DOB	STATUS	PLAN EFF DATE	
Dependents	Dependent's Name	Child		MM/DDYY	Inactive	05/01/2021	
Current Invoice							
Payment History							
ID Card							

If no dependent data is found, a message will indicate no results are found.

Current Invoice Tab

The Current Invoice tab will display the following information about the most recent invoice for that member:

Return to Active Members		Member's Name	
Overview	Current Invoice		
Plan Details	Date Due	03/31/2021	
Dependents	Amount Due	\$1,051.03	
Current Invoice	Invoice Date	03/10/2021	
Payment History	Invoice Period	04/01/2021 - 04/30/2021	
ID Card	Premium Amount	\$130.07	
	Last Payment Received		
	Last Payment Made	01/23/2021	
	Last Payment Amt	\$150.00	
	Payment Method	CHECK	

Dependent Tab Information:

- Dependent name
- Relation
- Address
- Date of birth
- Status of dependent
- Plan effective date of dependent.

.....

Current Invoice Tab Information:

CURRENT INVOICE DATA

- Date Due
- Amount Due (the amount owed by the member could be adjusted due to APTC or other adjustments)
- Invoice Date (when the invoice was created)
- Invoice Period
- Premium Amount (the amount billed, regardless of APTC or other adjustments)

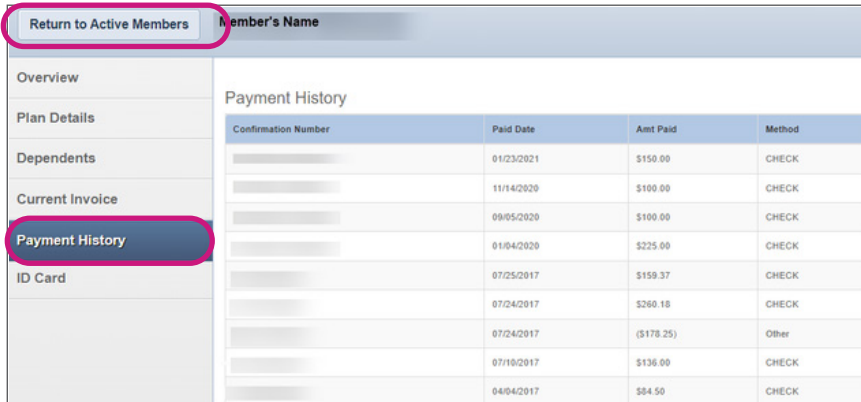
LAST PAYMENT RECEIVED DATA

- Last Payment Made
- Last Payment Amt
- Payment Method

Payment History Tab

The Payment History tab will display the following information about the payment history for that member:

Clicking the 'Return to Active Members' button will return the user to the Active Member List.



Confirmation Number	Paid Date	Amt Paid	Method
	01/23/2021	\$150.00	CHECK
	11/14/2020	\$100.00	CHECK
	09/05/2020	\$100.00	CHECK
	01/04/2020	\$225.00	CHECK
	07/25/2017	\$159.37	CHECK
	07/24/2017	\$260.18	CHECK
	07/24/2017	(\$178.25)	Other
	07/10/2017	\$136.00	CHECK
	04/04/2017	\$84.50	CHECK

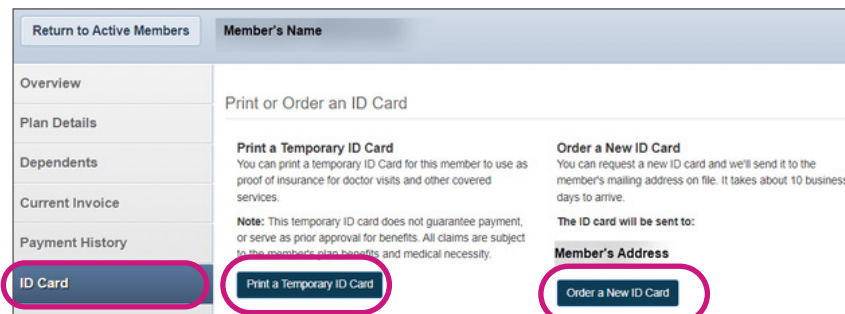
Payment History Tab Information:

- Confirmation Number of payment
- Paid Date
- Amount Paid
- Payment Method

ID Card Tab

The ID Card tab will allow a broker to view a temporary ID card for the member, or order an ID card for the member.

Printing a temporary ID card will download a PDF version of the card.



Print or Order an ID Card

Print a Temporary ID Card
You can print a temporary ID Card for this member to use as proof of insurance for doctor visits and other covered services.

Note: This temporary ID card does not guarantee payment, or serve as prior approval for benefits. All claims are subject to the member's plan benefits and medical necessity.

Order a New ID Card
You can request a new ID card and we'll send it to the member's mailing address on file. It takes about 10 business days to arrive.

The ID card will be sent to:

Member's Address

[Print a Temporary ID Card](#) [Order a New ID Card](#)

Suspended Member List

To view your Book of Business Suspended Member List:

- Select Book of Business at the top of the screen.
- The Suspended Member List page will display and detail the following information:

The screenshot shows the Health Net Broker Portal interface. At the top, the 'Book of Business' tab is highlighted. Below the navigation bar, the 'Book of Business' section is active, and the 'Suspended Members' tab is selected. A table displays a list of suspended members with the following columns: Member Name, Member ID, Plan Name, Orig Enroll Date, Plan Eff Date, and Alerts. The table contains four rows of data, each with a placeholder for the member's name and ID number, and 'N/A' for the other fields.

Member Name	Member ID	Plan Name	Orig Enroll Date	Plan Eff Date	Alerts
Member's Name	ID Number	Platinum 90 Ambetter HMO		N/A	
Member's Name	ID Number	Platinum 90 Ambetter HMO		N/A	
Member's Name	ID Number	Silver 73 Ambetter HMO		N/A	
Member's Name	ID Number	Silver 94 Ambetter HMO		N/A	

Other features on the page include:

- The ability to show 10, 25, 50, or 100 entries per page (the default is 10).
- The ability to print the list results.
- The ability to download the list results to Excel.
- Filter on the search results.

Phone contact to a suspended/cancelled members is prohibited by CMS rules and regulations.

- Thus when you click and open it, there will be no data displayed since CMS prohibits to contact suspended/cancelled members.

Suspended Member List Information:

- Member Name
- Member ID
- Plan Name
- Original Enrollment Date
- Plan Effective Date
- Alerts

Since a suspended member is not an active member, no ID card capability is presented to the broker.

Filtering Your Suspended List

To filter the list and find a specific member:

- Click the Filter button.
- This will expand the filter criteria allowing the user to search within that line of business:
- Once the data is entered, click Search to initiate the filtering.

Book of Business

Active Members | **Suspended Members** | Cancelled Members | On-Exch Pre-Members | Off-Exch Pre-Members

First Name:

Last Name:

Original Enrollment Date: From: MM/DD/YYYY To: MM/DD/YYYY

Plan Name:

Member ID:

Plan Effective Date: From: MM/DD/YYYY To: MM/DD/YYYY

Search

Cancelled Member List

To view your Book of Business Cancelled Member List:

- Select Book of Business at the top of your screen.
 - The Active Member List will be the default landing page.
- Click on Cancelled Members.
 - The Cancelled Member List page will display and detail the information:

health net

Book of Business | Admission Statements | Eligibility, Status & Activity | Sales & Quoting Resources | Support Tools | My Account

Viewing For: Broker's Name CA - Health Net Commercial IFP (10000) GO

Book of Business

Active Members | **Cancelled Members** | Suspended Members | On-Exch Pre-Members | Off-Exch Pre-Members

What does each Status mean?

Show 10 entries

Print Results | Download results as Excel

Member Name	Member ID	Plan Name	Orig Enroll Date	Plan Eff Date	Alerts
Member's Name	ID Number	Silver 87 Ambetter HMO		04/01/2017	
Member's Name	ID Number	Silver 70 Ambetter HMO		06/01/2022	
Member's Name	ID Number	Silver 70 Ambetter HMO		06/01/2022	
Member's Name	ID Number	Silver 87 Ambetter HMO		12/01/2022	

Other features on the page include:

- The ability to show 10, 25, 50, or 100 entries per page (the default is 10).
- The ability to print the list results.
- The ability to download the list results to Excel.
- Filter on the search results.

Phone contact to a suspended/cancelled members is prohibited by CMS rules and regulations.

- Thus the member's name is not clickable to see contact information.

Filtering Suspended List Information:

- Member Name
- Member ID
- Plan Name
- Original Enrollment Date (a range)
- Plan Effective Date (a range)

Cancelled Member List Information:

- Member Name
- Member ID
- Plan Name
- Original Enrollment Date
- Date
- Plan Effective Date
- Alerts

Since a cancelled member is not an active member, no ID card capability is presented to the broker.

If a member is dis-enrolled, the broker relationship will be maintained for a short period of time, after which that relationship will be removed, causing the member to drop from a Cancelled Member List.

In the event of a broker relationship change, upon that change being effective, the member will be dropped from the Cancelled Member List.

Filtering Your Cancelled List

To filter the list and to find a specific member:

- Click the Filter button.
- This will expand the filter criteria allowing the user to search within that line of business.
- Once the data is entered, click Search to initiate the filtering.

Book of Business

Active Members | Suspended Members | **Cancelled Members** | On-Exch Pre-Members | Off-Exch Pre-Members

Filter

First Name:

Last Name:

Original Enrollment Date: From: MM/DD/YYYY To: MM/DD/YYYY

Plan Name:

Member ID:

Cancellation Effective Date: From: MM/DD/YYYY To: MM/DD/YYYY

Plan Effective Date: From: MM/DD/YYYY To: MM/DD/YYYY

Search

Pre-member Lists

Depending on the line of business, there may be one or two different Pre-member lists.

- Medicare Supplement will have a single Pre-Members list while IFP/ Marketplace will have two:
- On-Exchange Pre-Members and Off-Exchange Pre-Members.
- The Pre-member Lists detail the same information as the Active Member List.
- The filters for Pre-member lists will match those of the Active Member List as will the ability to drill down into the member details.

health net

Book of Business | Commission Statements | Eligibility, Status & Activity | Sales & Quoting Resources | Support Tools | My Account

Viewing For: Broker's Name | CA - Health Net Medicare Supplement () | GO

Book of Business

Active Members | Cancelled Members | **Pre-Members** | Filter

Show 10 entries

Print Results | Download results as Excel

Member Name	Member ID	Plan Name	Orig Enroll Date	Plan Eff Date	Alerts
Member's Name	ID Number	MEDICARE SUPPLMNT INDEMNITY IND (PLAN G)		07/01/2022	

Showing 1 to 1 of 1 entries

Previous 1 Next

Filtering Cancelled List Searchable Information:

- Member Name
- Member ID
- Plan Name
- Original Enrollment Date (a range)
- Plan Effective Date (a range)
- Cancellation Effective Date (a range)

Pre-member List Information:

- Member Name
- Member ID (may be a U# or an R#)
- Plan Name
- Original Enrollment Date
- Plan Effective Date
- Alerts

IFP/Marketplace: On-Exchange Pre-Members and Off Exchange Pre-Members

The screenshot shows the Health Net 'Book of Business' interface. At the top, there is a navigation bar with icons for 'Book of Business', 'Commission Statements', 'Eligibility, Status & Activity', 'Sales & Quoting Resources', 'Support Tools', and 'My Account'. Below this, a 'Viewing For:' dropdown is set to 'Broker's Name' and a plan dropdown is set to 'CA - Health Net Commercial IFP'. A 'GO' button is to the right.

The main section is titled 'Book of Business' and includes a 'Filter' button. Below the title are several tabs: 'Active Members', 'Suspended Members', 'Cancelled Members', 'On-Exch Pre-Members', and 'Off-Exch Pre-Members'. The 'On-Exch Pre-Members' tab is highlighted with a red circle.

Below the tabs, there are links for 'What does each Status mean?' and 'What do these Alert icons mean?'. A 'Show' dropdown is set to '10' entries. There are also links for 'Print Results' and 'Download results as Excel'.

The main content is a table with the following columns: Member Name, Member ID, Plan Name, Orig Enroll Date, Plan Eff Date, and Alerts. The table contains four rows of data:

Member Name	Member ID	Plan Name	Orig Enroll Date	Plan Eff Date	Alerts
Member's Name	ID Number	Silver 70 Ambetter HMO		01/01/2023	
Member's Name	ID Number	Silver 87 Ambetter HMO		07/01/2023	
Member's Name	ID Number	Silver 94 Ambetter HMO		01/01/2023	
Member's Name	ID Number	Silver 94 Ambetter HMO		01/01/2023	

Book of Business – Commercial Group

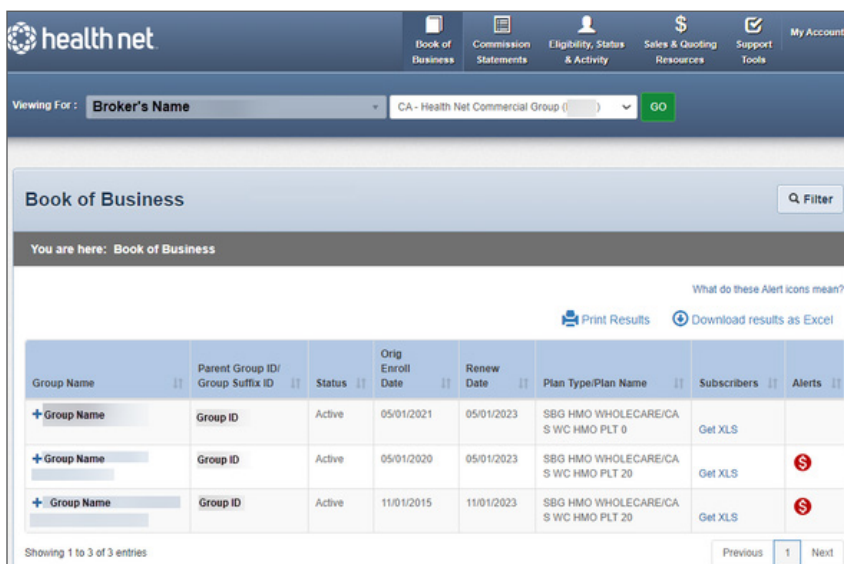
Overview

The Book of Business tool allows you to view your group client base for the selected state/plan in your dashboard. The tool is modeled after the legacy HealthNet tool to provide a continuity of experience and familiarity with the tool.

Group Book of Business

To view your Group Book of Business:

- Select a group profile in your dashboard.
- Then select Book of Business tab from the Navigation Menu located at the top of the screen.
- The default landing page will detail the information:



The screenshot shows the HealthNet 'Book of Business' interface. At the top, there is a navigation menu with options: Book of Business, Commission Statements, Eligibility, Status & Activity, Sales & Quoting Resources, Support Tools, and My Account. Below the navigation, there is a search bar with 'Broker's Name' and a dropdown for 'CA - Health Net Commercial Group'. The main content area is titled 'Book of Business' and includes a 'Filter' button. Below this, there is a breadcrumb 'You are here: Book of Business' and a link to 'What do these Alert icons mean?'. The main table displays group information with columns: Group Name, Parent Group ID/ Group Suffix ID, Status, Orig Enroll Date, Renew Date, Plan Type/Plan Name, Subscribers, and Alerts. There are three rows of data, each with a 'Get XLS' link and an alert icon. The first row has no alert icon, the second and third rows have a red alert icon.

Group Name	Parent Group ID/ Group Suffix ID	Status	Orig Enroll Date	Renew Date	Plan Type/Plan Name	Subscribers	Alerts
+ Group Name	Group ID	Active	05/01/2021	05/01/2023	SBG HMO WHOLECARE/CA S WC HMO PLT 0	Get XLS	
+ Group Name	Group ID	Active	05/01/2020	05/01/2023	SBG HMO WHOLECARE/CA S WC HMO PLT 20	Get XLS	🚨
+ Group Name	Group ID	Active	11/01/2015	11/01/2023	SBG HMO WHOLECARE/CA S WC HMO PLT 20	Get XLS	🚨

Other Features on the page include:

- The ability to print the list results
- The ability to download the list results to Excel
- Filter on the search results
- View what each Alert icon means
- If you have more than one legacy Broker ID, then to view a group list for an ID other than the legacy Broker ID shown in the dashboard, you must change the dashboard to that ID
- Click **Go**.

A broker-client relationship must exist in the source systems for a member to show on a Broker's book of business.

The default landing page information:

- Group Name (can be clicked to expand and see the child groups under that ID)
- Parent Group ID / Group
- Suffix ID
- Status
- Original Enrollment Date
- Renew Date
- Plan Type / Plan Name
- Subscribers
- Alerts

Filtering Your Group List

To filter the list and to find a specific group:

- Click the **Filter button**.
- This will expand the filter criteria allowing the user to search within that line of business.
- Once the data is entered, click Search to initiate the filtering.

Subscribers

If the group contains subscribers, a link to view the combined subscribers in all the groups under that parent is presented at the Parent Group Level. This will download a spreadsheet.

When a group is expanded, and there are subscribers in a child group, the user has two options:

- **View List** – clicking this takes the user to the Subscriber List screen for the child group
- **Get XLS** – clicking this will download the list of subscribers for the child group.

Group List Filter Criteria:




- Group Name
- Parent Group ID
- Group Suffix ID
- Status (default is Active)
- Alert Type
- Plan Name
- Plan Type
- Original Enrollment Date (a range)
- Renewal Date (a range)

Subscriber List XLS information:

- Subscriber First Name
- Subscriber Last Name
- Subscriber ID
- Plan Type
- Plan Name
- Status
- Address
- Phone Number
- Relation
- Effective Date
- Overage Adult Dependent (OAD)
- Notes (will be any member specific alerts)

Alerts

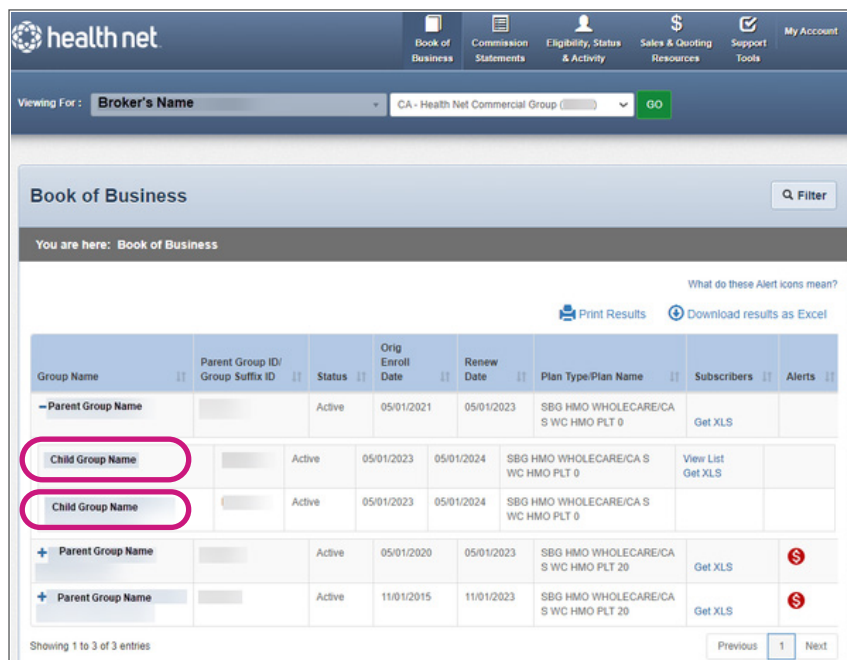
These are alerts that can be displayed for Employer Groups when applicable



Alert Icon Definitions	
Alert	Definition
	Delinquent Payment
	Pending Renewal
	Termed

View Group Details

The Group Name in the list is hyperlinked and clickable.

- Clicking on the Parent Group will expand the list to see all child groups beneath that make up that parent group.
- To view a specific group's details:
 - Click on the child Group name.



Group Name	Parent Group ID/ Group Suffix ID	Status	Orig Enroll Date	Renew Date	Plan Type-Plan Name	Subscribers	Alerts
- Parent Group Name		Active	05/01/2021	05/01/2023	SBG HMO WHOLECARE/CA S WC HMO PLT 0	Get XLS	
Child Group Name		Active	05/01/2023	05/01/2024	SBG HMO WHOLECARE/CA S WC HMO PLT 0	View List Get XLS	
Child Group Name		Active	05/01/2023	05/01/2024	SBG HMO WHOLECARE/CA S WC HMO PLT 0		
+ Parent Group Name		Active	05/01/2020	05/01/2023	SBG HMO WHOLECARE/CA S WC HMO PLT 20	Get XLS	
+ Parent Group Name		Active	11/01/2015	11/01/2023	SBG HMO WHOLECARE/CA S WC HMO PLT 20	Get XLS	

Alert Information

- Delinquent Payment
- Pending Renewal
- Termed

Additional Details on Multiple Tabs:

- Contact Information (default)
- Group Status & Key Dates
- Billing & Payment
- Renewal & Enrollment
- View Subscriber List (link)

Contact Information Tab

The Contact Information tab will display information about that group:

Return to Active Groups Group Name ()

You are here: Book of Business / Group Details Download results as Excel Print

Contact Information

Group Status & Key Dates

Billing & Payment

Renewal & Enrollment

View Subscriber List

Contact Information

Parent Group Name

Suffix Name

Group Number

Group Admin

Group Admin Address

Group Phone Number

Group State

You can download the page as Excel, or print it.

Contact Tab Information:

- Parent Group Name
- Suffix Name
- Group Number
- Group Admin
- Group Admin Address
- Group Phone Number

Group Status & Key Dates Tab

The Group Status & Key Dates tab will display the information about the most recent invoice for that member:

Return to Active Groups Group Name ()

You are here: Book of Business / Group Details Download results as Excel Print

Contact Information

Group Status & Key Dates

Billing & Payment

Renewal & Enrollment

View Subscriber List

Group Status

Group Status Active

Active 2 Subscribers

Active Members 6

Cancelled 0 Subscribers

Group SIC Code 6321

Rating Type R

Key Dates

Original Effective Date 05/01/2021

Parent Group Effective Date 05/01/2021

Suffix Effective Date 05/01/2021

Cancellation Date

Group Status & Key Dates Information:

- Group Status data
- Group Status
- Active Subscribers
- Active Members
- Canceled Subscribers
- Group SIC Code
- Rating Type
- Key Dates data
- Original Effective Date
- Parent Group Effective Date
- Suffix Effective Date
- Cancellation Date

Billing & Payment Tab

The Billing & Payment tab will display the information about that group:

Billing & Payment	
Balance Forward (Prior Balance)	\$0.00
Current Period Amount Due	\$2,009.35
Adjustments	\$0.00
Payments	(\$2,009.35)
Balance Due	\$2,009.35
Due Date of Current Bill	11/01/2023
Last Payment Made	11/01/2023
Last Payment Amount	(\$2,009.35)

Billing & Payment Information:

- Balance Forward (Prior Balance)
- Current Period Amount Due
- Adjustments
- Payments
- Balance Due
- Due Date of Current Bill
- Last Payment Made
- Last Payment Amount

Renewal & Enrollment Tab

The Renewal & Enrollment tab will display the information about that group:

Renewal Details	
Current Amount (Premium)	\$2,009.35
Renewal Month	May
Group Last Renewal Date	05/01/2023
Group Billing Address	
Billing Contact Phone Number	

Enrollment	
Waiting Period Non-Management	First Of Month AFTER 60 DAYS
Waiting Period Management	First Of Month AFTER 60 DAYS

Renewal & Enrollment Information:

RENEWAL DETAILS

- Current Amount (Premium)
- Renewal Month
- Group Last Renewal Date
- Group Billing Address
- Billing Contact Phone Number

ENROLLMENT

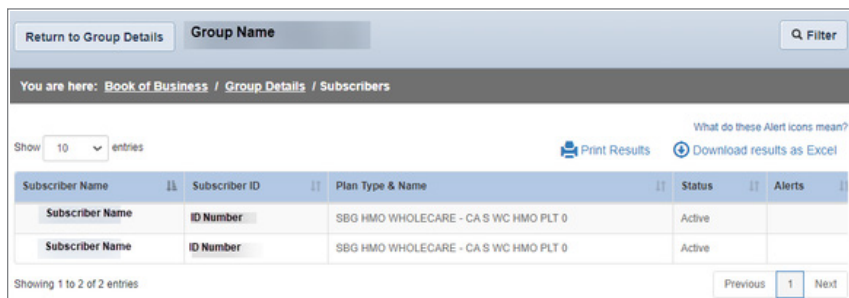
- Waiting Period Non Management
- Waiting Period Management

View Subscriber List

You can view the subscribers within a child group in one of two ways:

- Clicking View List from the Group List page
- Clicking View Subscriber List from the Group Details page

The Subscriber List will contain the details for the subscribers within the group:



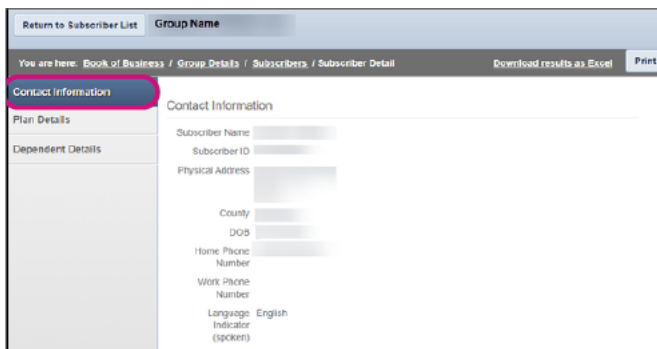
The screenshot shows a web interface for viewing a subscriber list. At the top, there is a navigation bar with "Return to Group Details" and "Group Name" (blurred). Below this is a breadcrumb trail: "You are here: Book of Business / Group Details / Subscribers". A search filter is visible on the right. The main content area features a table with the following columns: Subscriber Name, Subscriber ID, Plan Type & Name, Status, and Alerts. Two rows of data are visible, both with "Active" status. Below the table, it says "Showing 1 to 2 of 2 entries" and includes "Previous" and "Next" navigation buttons.

Subscriber Name	Subscriber ID	Plan Type & Name	Status	Alerts
Subscriber Name	ID Number	SBG HMO WHOLECARE - CA S WC HMO PLT 0	Active	
Subscriber Name	ID Number	SBG HMO WHOLECARE - CA S WC HMO PLT 0	Active	

- Clicking a Subscriber name will present you with specifics about that subscriber.
- Additional details will be available in multiple tabs.

Contact Information Tab

The Contact Information tab will display the information about that subscriber:



The screenshot shows the "Contact Information" tab selected in a sidebar. The main content area displays the following fields: Subscriber Name, Subscriber ID, Physical Address, County, DOB, Home Phone Number, Work Phone Number, and Language Indicator (English (spoken)).

Subscriber Name	
Subscriber ID	
Physical Address	
County	
DOB	
Home Phone Number	
Work Phone Number	
Language Indicator (spoken)	English

Subscriber List Information:

- Subscriber Name
- Subscriber ID
- Plan Type & Name
- Status
- Alerts

Additional Subscriber Information in Multiple Tabs:

- Contact Information
- (default)
- Plan Details
- Dependent Details

Contact Tab Information:

- Subscriber Name
- Subscriber ID
- Physical Address
- County
- DOB
- Home Phone Number
- Work Phone Number
- Language Indicator
- (Spoken)

Plan Details Tab

The Plan Details tab will display the information about that subscriber's plan:

Return to Subscriber List **Group Name**

You are here: [Book of Business](#) / [Group Details](#) / [Subscribers](#) / [Subscriber Detail](#) [Download results as Excel](#) [Print](#)

Contact Information

Plan Details

Dependent Details

Plan Name: CA S WC HMO PLT 0
Plan Type: SBG HMO WHOLECARE
Status: Active
Rating Region: NPG
CAL COBRA¹: No
FED COBRA²: No

1. CAL COBRA: State Continuation coverage for employer groups with 2-19 employees. The Carrier is responsible for administering. Premiums are paid by the member to HRI directly. Cal COBRA is only applicable in the CA region.
2. FED COBRA: Cobra for employer groups with 20+ employees. Can be Direct Pay billed by the carrier to the previous employee or Group/TPA billed.

Plan Details Information:

- Plan Name
- Plan Type
- Status
- Rating Region
- CAL COBRA
- FEB COBRA

Dependent Details Tab

The Dependent Details tab will display the information about that subscriber's dependents, if applicable:

Return to Subscriber List **Group Name**

You are here: [Book of Business](#) / [Group Details](#) / [Subscribers](#) / [Subscriber Detail](#) [Download results as Excel](#) [Print](#)

Contact Information

Plan Details

Dependent Details

Name	Relation	Physical Address	DOB	Age	Status	Mbr Eff Date	OAD
Dependent's Name	spouse			33	Active		No
Dependent's Name	child			4	Active		No
Dependent's Name	child			2	Active		No
Dependent's Name	child			0	Active		No

Dependent Details Information:

- Name
- Relation
- Physical Address
- DOB
- Age
- Status
- Member Effective Date
- Overage Adult Dependent (OAD) Status

Additional Resources

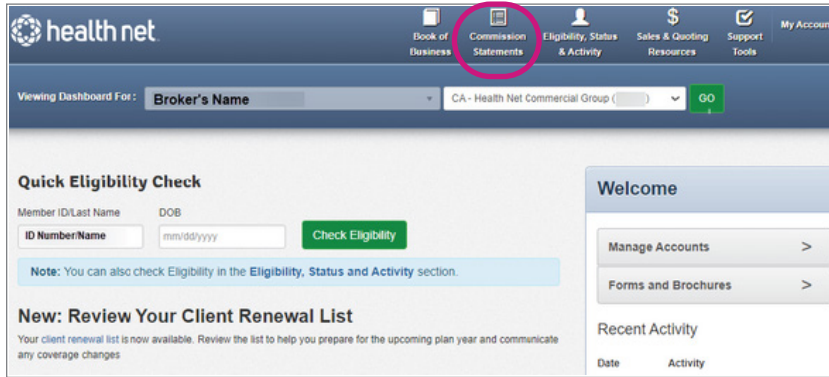
Additional guides and resources for self service options that are available can be found on the Health Net Broker site in the **Forms & Brochures** section.

Commission Statements

Contact Information Tab

To view your Commission Statements:

- Select the Commissions Statements tab in the navigation menu located at the top of the screen.



IFP/Marketplace

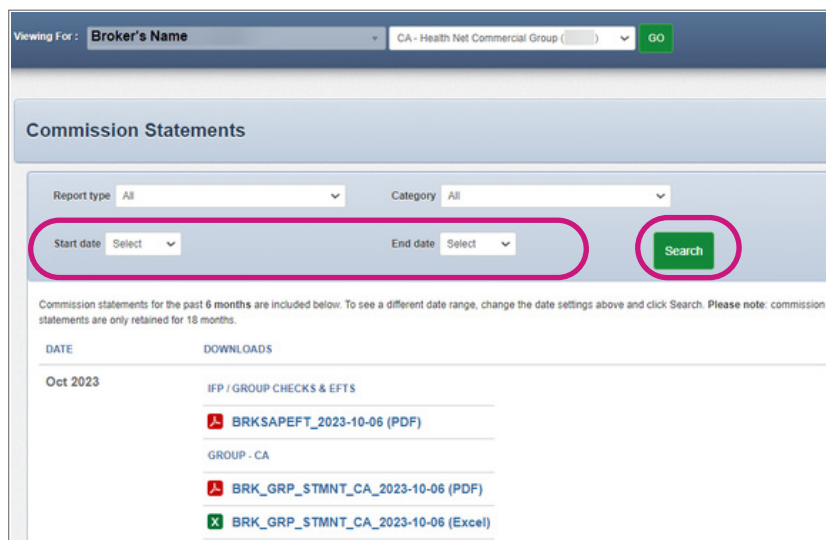
By default, any commission statements and other related documents created within the past six (6) months will be displayed on the page.

- To find additional reports past six months, modify the start and end dates and search.

Commercial Group & Medicare Supplement

By default, any commission statements and other related documents created within the past one (1) month will be displayed on the page.

- To find additional reports past the most current month, modify the start and end dates and search.

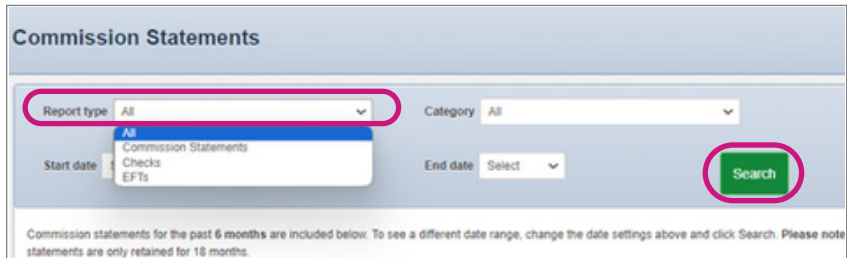


Health Net Broker statements are based on the legacy Health Net Broker ID, you may not see everything in one view. If not, try changing the state/plan on your dashboard.

Searching by Report Type and Date

If you want to separate out the data presented, you can change the report type to reflect the type of document to show.

- You can also change the start and end dates to reflect a shorter (or longer) time period.



The screenshot shows a web interface titled "Commission Statements". It features a search form with the following elements:

- Report type:** A dropdown menu currently set to "All", with a red circle around it. A dropdown menu is open below it, showing options: "All", "Commission Statements", "Checks", and "EFTs".
- Category:** A dropdown menu currently set to "All".
- Start date:** A date input field.
- End date:** A dropdown menu currently set to "Select".
- Search:** A green button with the text "Search", circled in red.

Below the search form, there is a note: "Commission statements for the past 6 months are included below. To see a different date range, change the date settings above and click Search. Please note statements are only retained for 18 months."

- Clicking a file will open the commission statement to view, print, save, and so on.

Eligibility, Status & Activity

Overview

- Within the Eligibility, Status & Activity section, the available pages will depend on the profile selected in the dashboard.

IFP/Marketplace

The screenshot shows the Health Net interface for IFP/Marketplace. The top navigation bar includes 'Book of Business', 'Commission Statements', 'Eligibility, Status & Activity', 'Sales & Quoting Resources', 'Support Tools', and 'My Account'. The main content area has a 'Viewing For:' dropdown set to 'Broker's Name' and a 'CA - Health Net Commercial IFP' dropdown with a 'GO' button. Below this are input fields for 'Eligibility as of' (11/07/2023), 'Member ID/Last Name' (123456789 or Smith), and 'DOB' (mm/dd/yyyy), with a 'Check Eligibility' button and a 'Print' icon. A tabbed interface shows 'Eligibility Status & Activity' as the active tab, with sub-tabs for 'Application Status' and 'Eligibility Lookup'. The 'Member Eligibility Search Results' section contains a table with columns 'ELIGIBLE', 'ELIGIBILITY AS OF', and 'MEMBER NAME'.

IFP/Marketplace & Medicare Supplement available pages are:

- Application Status (default landing page)
- Eligibility Lookup

Commercial Group

The screenshot shows the Health Net interface for Commercial Group. The top navigation bar is identical to the IFP/Marketplace page. The 'Viewing For:' dropdown is set to 'Broker's Name' and the 'CA - Health Net Commercial Group' dropdown has a 'GO' button. Input fields for 'Eligibility as of' (11/07/2023), 'Member ID/Last Name' (123456789 or Smith), and 'DOB' (mm/dd/yyyy) are present, along with 'Check Eligibility' and 'Print' buttons. The 'Eligibility Status & Activity' tab is active, with sub-tabs for 'Eligibility Lookup' and 'Group Billing & Enrollment'. The 'Member Eligibility Search Results' section contains a table with columns 'ELIGIBLE', 'ELIGIBILITY AS OF', and 'MEMBER NAME'.

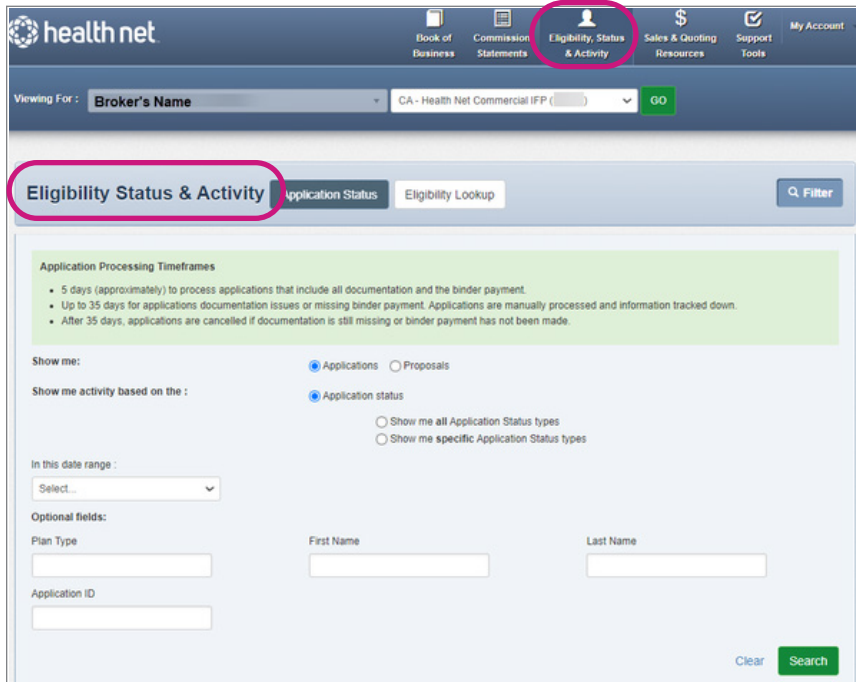
Commercial Group available pages are:

- Eligibility Lookup (default landing page)
- Group Billing & Enrollment

Application Status

APPLICABLE LINES OF BUSINESS: IFP/MARKETPLACE, MEDICARE SUPPLEMENT

Within the Eligibility, Status & Activity section, the default landing page is Application Status.

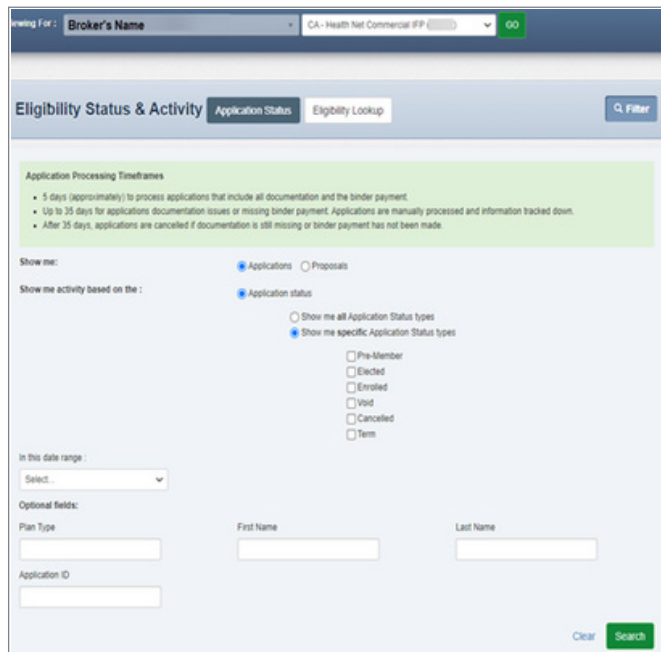


While the tool for Commercial IFP and Medicare Supplement are nearly identical, there are some differences you should be aware of.

Differences Commercial IFP vs. Medicare

- The application processing times will differ in the green bar
- The type of search would also vary slightly
- The status types will also differ slightly, as well.

IFP/Marketplace



Application Status (continued)

Medicare Supplement

- To use the Application Status, you need to select a either an IFP/Marketplace or Medicare Supplement plan from your dashboard.

To Search:

- Select ALL Application status types (generally the best approach for IFP/Marketplace)
- Select the date range
- Enter any additional information in the Optional Fields section
- Click **Search**

The maximum date range for search is **6 months**

Application Status (continued)

The results will be returned based on the search parameters:

Activity history results found. Filter: date range 05/08/2023 to 11/07/2023, sorted by Application Status

Show 10 entries

Print Results Download results as Excel

App Status	Client Name	Submitted Date	Effective Date	Plan Type	Premium	View Application
Enrolled	Name			SILVER 70 AMBETTER HMO	\$471.56	N/A
Enrolled	Name			SILVER 87 AMBETTER HMO	\$283.90	N/A
Enrolled	Name			SILVER 87 AMBETTER HMO	\$847.78	N/A
Enrolled	Name			SILVER 73 AMBETTER HMO - ON EXCHANGE	\$557.11	N/A
Enrolled	Name			SILVER 73 AMBETTER HMO - ON EXCHANGE		N/A
Suspended	Name			SILVER 73 AMBETTER HMO	\$735.24	N/A

Showing 1 to 10 of 25 entries

Previous 1 2 3 Next

- Clicking View Application will pull up an image of the Off Exchange IFP/Marketplace application.

Return to Application Status Name Print

Overview

Dependents

Contact Information

First Name
Last Name
Address
Home Phone Number
Email Address
County

Applicant Overview

Gender
DOB
Age

Applications

Type Silver 87 Ambetter HMO
ID Number
Status/Notes

Return to Application Status Name Print

Overview

Dependents

Dependent Name

NAME	RELATION	ADDRESS	DOB	STATUS	PLAN EFF DATE
Dependent Name	Spouse			Active	01/01/2024
Dependent Name	Child			Active	01/01/2024
Name	Subscriber			Active	01/01/2024

- Clicking the member's name will display additional details about the applicant, and any dependents if applicable.

On Exchange IFP/Marketplace plans will not have an application image, since those plans are submitted electronically via the Exchanges. Only the Off Exchange plans will.

Medicare Supplement plans will not have an application image to view.

Viewing Individual & Family Plan (IFP) Proposals

APPLICABLE LINES OF BUSINESS: CA IFP/MARKETPLACE

To view CA IFP/Marketplace proposals you have sent to your clients:

- Select a California (IFP) plan from your dashboard
- Navigate to the Application Status tool

The results will be returned based on the search parameters:

Activity history results found. Filter: date range 05/06/2023 to 11/07/2023, sorted by Application Status.

Show 10 entries Print Results Download results as Excel

App Status	Client Name	Submitted Date	Effective Date	Plan Type	Premium	View Application
Delivered		2023-11-07 11:52:58.375	2024-01-01 00:00:00.0	SILVER 70 OFF EXCHANGE AMBETTER HMO	0.0	Proposal
Delivered		2023-11-07 11:51:15.935	2024-01-01 00:00:00.0	SILVER 70 OFF EXCHANGE AMBETTER HMO	0.0	Proposal
Delivered		2023-11-06 05:08:23.742	2024-01-01 00:00:00.0	SILVER 70 OFF EXCHANGE AMBETTER HMO	0.0	Proposal
Delivered		2023-11-06 05:06:54.465	2024-01-01 00:00:00.0	SILVER 70 OFF EXCHANGE AMBETTER HMO	0.0	Proposal
Delivered		2023-11-06 05:05:58.299	2024-01-01 00:00:00.0	SILVER 70 OFF EXCHANGE AMBETTER HMO	0.0	Proposal
Delivered		2023-11-05 05:08:40.518	2024-01-01 00:00:00.0	SILVER 70 OFF EXCHANGE AMBETTER HMO	0.0	Proposal

Showing 1 to 10 of 552 entries Previous 1 2 3 4 5 ... 56 Next

To Search:

- Select the Proposals option and the date range
- Enter any additional information in the Optional Fields section.
- Click **Search**.

The maximum date range for search is **6 months**

The only status at this time is **'Delivered'**, indicating that the proposal email was sent to the client.

Viewing Commercial IFP Proposals

Clicking the member's name will display additional details about the proposal, including the plans selected for that client.

[Return to proposal search](#) **Name** [Print](#)

Overview

Contact Information

First Name: [Redacted]
Last Name: [Redacted]
Address: [Redacted]
Phone: [Redacted]
Email Address: [Redacted]

Applicant Overview

DOB: [Redacted]
Age: [Redacted] years old

Proposal

Type: Silver 70 Off Exchange Ambetter HMO
HMO Adult Vision & Dental Rider

ID Number: [Redacted]
Status/Notes: [Redacted]

Eligibility Lookup

APPLICABLE LINES OF BUSINESS:

IFP/MARKETPLACE, COMMERCIAL GROUP, MEDICARE SUPPLEMENT

Viewing Member Eligibility

To verify member eligibility:

- Select Eligibility, Status & Activity at the top of your screen.
- Select Eligibility Lookup.
- Enter the Eligibility as of (if it is not today's date; otherwise, today's date will be the default value)

ELIGIBLE	ELIGIBILITY AS OF	MEMBER NAME
👍 Eligible	11/07/2023	Member Name

Viewing Member Details

The Member Record opens to the Overview tab and displays Member Information.

Start Date	End Date	Plan Name
Sep 1, 2021	Dec 31, 2021	Silver 73 CommunityCare HMO
Jan 1, 2023	Dec 31, 2023	Silver 87 Ambetter HMO

Eligibility Lookup Information:

- Member's ID or Last Name
- Member's Date of Birth
- Click Check Eligibility.
- To check additional members, repeat the steps above.
- To print the eligibility information, click **Print**.
- To open the Member Details, click on the blue Member Name.

Viewing Member Eligibility (continued)

The Member Record opens to the Dependents tab and displays Dependent Details.



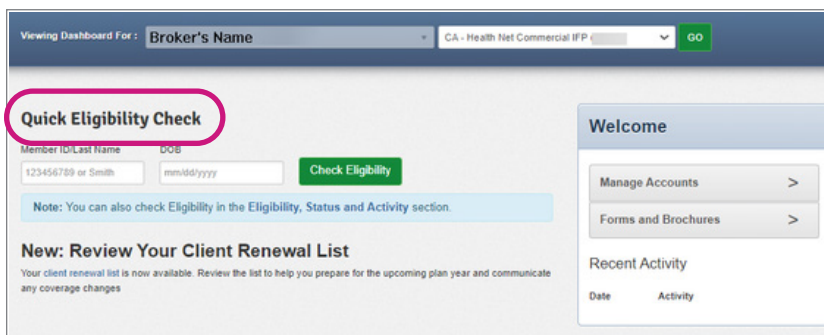
The screenshot shows a web interface with a sidebar on the left containing 'Overview' and 'Dependents' (highlighted with a red circle). The main content area is titled 'Dependent Details' and contains a table with the following data:

NAME	RELATION	ADDRESS	DOB	STATUS	PLAN EFF DATE
Name	Spouse			Active	01/01/2023

- You can also use the Quick Eligibility Check on the landing page when you log in.

Quick Eligibility Lookup

- Unlike the option described above, this option only looks at the current date's eligibility of a member.



The screenshot shows a dashboard for a broker. At the top, there is a header with 'Viewing Dashboard For: Broker's Name' and a dropdown menu set to 'CA - Health Net Commercial IFP' with a 'GO' button. Below this, the 'Quick Eligibility Check' section is highlighted with a red circle. It contains two input fields: 'Member ID/Last Name' with the value '123456789 or Smith' and 'DOB' with the value 'mm/dd/yyyy'. A green 'Check Eligibility' button is positioned to the right of the DOB field. Below the inputs is a blue note: 'Note: You can also check Eligibility in the Eligibility, Status and Activity section.' To the right of the main content is a 'Welcome' sidebar with links for 'Manage Accounts' and 'Forms and Brochures', and a 'Recent Activity' section with columns for 'Date' and 'Activity'. Below the note is a section titled 'New: Review Your Client Renewal List' with a sub-header 'Your client renewal list is now available. Review the list to help you prepare for the upcoming plan year and communicate any coverage changes.'

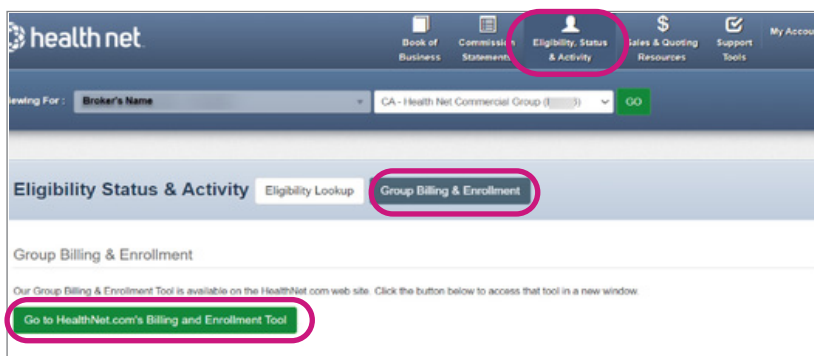
Group Billing & Enrollment

APPLICABLE LINES OF BUSINESS: COMMERCIAL GROUP

Group Billing & Enrollment Support

To Support your Group's billing enrollment capabilities:

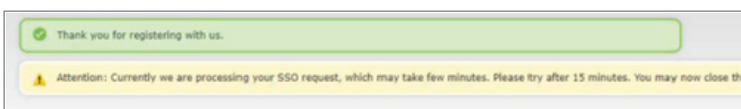
- Select a group profile from your dashboard and click **GO**.
- Select **Eligibility, Status & Activity** at the top of your screen.
- Select **Group Billing & Enrollment**.
- Click the **Go to HealthNet.com Billing and Enrollment Tool** button.
You will be single signed on (SSO) to the legacy HealthNet broker portal to use those tools.



- You will land on the following page, and be able to search for your groups and support them, just as you do now.

A screenshot of the 'Access Group Billing and Enrollment' page. The page has a teal header with 'SBO BROKER TOOLS', 'VIEW GROUP BILLING & ENROLLMENT', and 'GET GROUP DOCUMENT'. Below the header, there is a section titled 'Access Group Billing and Enrollment' with the instruction 'Choose one or all of the following options to search for group online billing & enrollment.' There are four input fields: 'Client ID/Policy Holder ID: (Optional)', 'Client Name/Policy Holder Name:', 'Group ID/Suffix: (Optional)', and 'Group Name: (Optional)'. At the bottom, there is a 'CLEAR' button and a green 'SEARCH' button. A footnote at the bottom reads: '¹ For California, Oregon and Arizona, enter the Policyholder ID. (The Policyholder ID must be 9 numbers. Use preceding zeroes if needed. For example, "000012345.")'

- If this is the first time you've navigated to the tool, you will see the following message: "Wait approximately 5-10 minutes and try again."



Sales & Quoting Tools

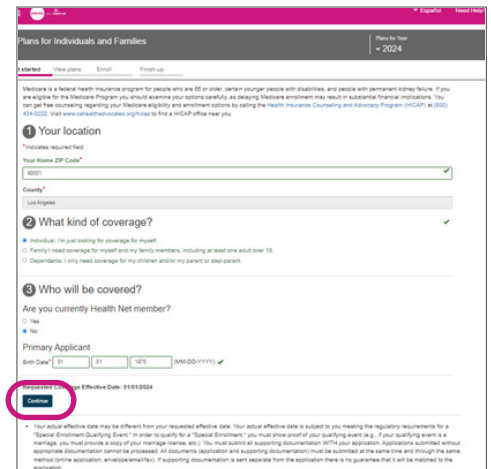
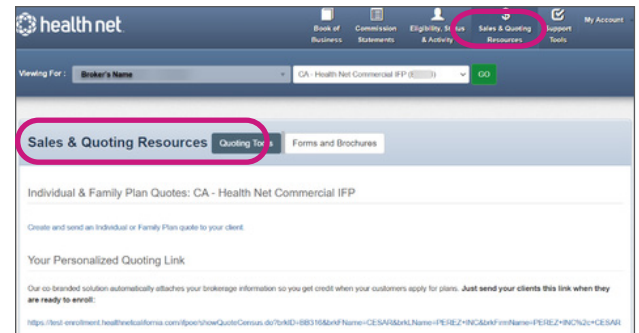
APPLICABLE LINES OF BUSINESS:
CA IFP, COMMERCIAL GROUP, CA MEDICARE SUPPLEMENT

California: Health Net Commercial Individual & Family Plan Online Enrollment

Proposal Tool

To access and create a proposal for Commercial IFP products for a California Commercial IFP plan:

- Select the Health Net Commercial plan from dashboard & click **Go**.
- Select **Sales & Quoting Resources** at the top of the screen.
 - The default landing page will be the Quoting Tools page.
- Click the **Create an Individual or Family Plan Proposal** link.
- Enter a California ZIP code.
 - The county will automatically populate, unless the ZIP code crosses two counties, at which point you must select one.
- Select the kind of coverage you are creating a proposal for:
 - Individual: an individual applicant over 18
 - Family: an individual over 18 with family members
 - Dependents: children – applicant(s) under 18
- Enter the birth dates for each applicant.
 - The primary will be listed with the option to select a Spouse/Domestic Partner or Dependent based on selecting Family or Children coverage types.
 - Click **Continue**



For the plans you wish to recommend to your client: Check the **'Include in Proposal'** box.

Proposal Tool (continued)

To filter the Plan Types:

- Click **Filter/Sort Results** button located at the upper left corner of the screen. (A new window will pop-up).
- Select the desired plans
- Click **Save Filter**.

The screenshot shows a web interface for selecting health plans. At the top, it says 'Plans for Individual and Families' for '1 person in ZIP Code 92103 (San Diego, CA)'. Below this, there are two plan options:

- Plan 1:** Health Net of California, Inc. Silver 70 Off Exchange Ambetter HMO (HMO). Monthly premium: \$1,103.22. It includes Medical Coverage, Prescription Coverage (Tiers 1-4), and Dental and Vision.
- Plan 2:** Health Net of California, Inc. Silver 70 Off Exchange Ambetter HMO + Adult Dental & Vision (HMO). Monthly premium: \$1,119.68. It includes Medical Coverage, Prescription Coverage, and Dental and Vision.

The modal window titled 'Filter/Sort Results' contains the following options:

- Plan Type:** HMO - Health Maintenance Organization, PPO - Preferred Provider Organization.
- Plan Level:** Platinum, Gold, Silver, Bronze, Minimum Coverage.
- Sort by:** A dropdown menu currently set to 'Recommended'.
- Buttons:** 'Cancel' and 'Save Filter' (highlighted with a red circle).

- When done, scroll to the bottom of the plan offerings page and click the 'Include Selected Plans in Proposal' button. This will return you back to the portal to continue crafting the proposal

The screenshot shows the bottom of the plan offerings page. A button labeled 'Include Selected Plans in Proposal' is highlighted with a red circle. Below the button, there is a 'Back' link and several lines of small text providing disclaimers and terms of service.

Proposal Tool (continued)

- Enter the Applicant's First Name, Last Name, and Email.
- You can also include additional details like Address and Phone Number.
- When done, click Next.

Sales & Quoting Resources Quoting Tools Forms and Brochures

Applicant Information

First Name *

Last Name *

Applicant Email *

Retype Applicant Email *

Additional Applicant Details

Street Address 1 City

Street Address 2 Zip Code

Phone Number State

Back **Next**

Review the information on the next page, including:

- The applicants included in the proposal, including date of birth.
- The Plans included, and whether the adult dental and vision riders should be included or not.
- When done, click **Next**.

Sales & Quoting Resources Quoting Tools Forms and Brochures

Application Overview

Applicant	DOB	Age
Primary	01/01/1970	54

Proposal Contents

Plan	Total Premium	Itemized Premium	Actions
Silver 70 OR Exchange Anbottler PPO	\$347.66	\$347.66	Remove Plan From Proposal
All Applicants 19 and over PPO Adult Vision & Dental Rider		\$0.00	<input checked="" type="checkbox"/> Include in Proposal

Back **Next**

Proposal Tool (continued)

Finally, you may include a personalized message to your client before the proposal is sent off.

- You can see the general structure of the proposal email your client will receive.
- When done, click 'Send Proposal'.

Sales & Quoting Resources Quoting Tools Forms and Brochures

Proposal Created

Please Note if you leave this page without clicking the 'Send Proposal' button below, Health Net will not be able to connect this Proposal to an Application. To enable full Tracking options, please be sure to send the Proposal before leaving this page.

Email the Proposal to your Client

The following email will be sent to the client when you click the 'Send Proposal' button. You can also add your own comments to the email in the 'Add Personalized Note' section below.

Add a personalized note [Clear Personalized Note](#)

400 characters remaining

The Proposal Email

Your broker has created a Health Net plan for Individuals and Families proposal for you to review.

[The personalized note will be included here]

To view the proposed plans and begin the enrollment process, click this link:
[distinct link for your client will be inserted here]

You can also view the proposal, including plan benefit details, at this link:
[distinct link to the proposal web form will be inserted here]

Please contact your broker for additional questions or assistance.

Sincerely, Health Net

Please do not respond to this email.

[Back](#) [Send Proposal](#)

You will get a confirmation:

- Verifying the proposal was sent
- Along with the email you sent with it
- An ID number you can use to search for the proposal details in the Application status tool.

[Return to Sales & Quoting](#) **Proposal Sent Confirmation**

Thank you for submitting your proposal. It has been successfully sent to: marishshka@yahoo.com

The ID for this Proposal is: 23136

[Re-send broker proposal email](#)

Note: This proposal will expire in 60 days.

The link provided to your client will expire in **60 days**.

Proposal Tool (continued)

Sample email sent to applicants of a proposal:

Your broker has created a Health Net plan for Individuals and Families proposal for you to review.

Hello, Please the attached proposal.

To view the proposed plans and begin the enrollment process, click this link:

<https://test-broker.brokersecureportal.com/brokerconnect/public/callQuote?verificationCode=yMBEPaj1tAONIc3Y>

You can also view the proposal, including plan benefit details, at this link:

<https://test-broker.brokersecureportal.com/brokerconnect/public/proposalDetail?verificationCode=yMBEPaj1tAONIc3Y&licenseNumber=0116240>

Please contact your broker for additional questions or assistance.

Sincerely, Health Net

Note: This proposal will expire in 60 days.

Please do not respond to this email.

CONFIDENTIALITY NOTICE: This communication contains information intended for the use of the individuals to whom it is addressed and may contain information that is privileged, confidential or exempt from other disclosure under applicable law. If you are not the intended recipient, you are notified that any disclosure, printing, copying, distribution or use of the contents is prohibited. If you have received this in error, please notify the sender immediately by telephone or by returning it by return mail and then permanently delete the communication from your system. Thank you.

The link provided to your client will
expire in **60 days**.

- The link your applicant will see will mirror the experience of the California Commercial IFP quoting tool, except your client will only see those plans you selected within the proposal for them to apply for online.
- Additionally, your broker information will be captured as they enroll online so you get appropriate credit for the sale.

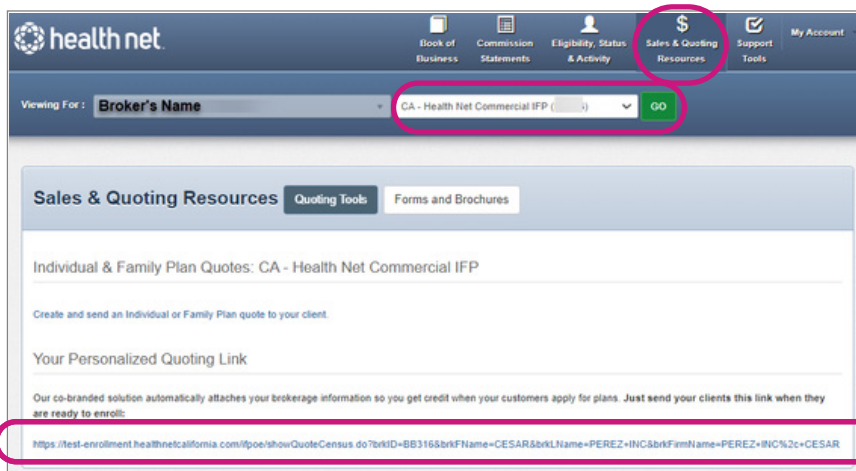
Sales & Quoting Tools

California: Health Net Commercial Individual & Family Plan (IFP) Online Enrollment Co-Branded Link

Branded Link

To access your own personalized co-branded link for the California Commercial IFP quoting tool:

- Select the Health Net Commercial IFP plan on dashboard
- Click Go.
- Click 'Sales & Quoting Resources' at the top of your screen.
- The default landing page will be the 'Quoting Tools' page.
- Click the link in the 'Your Personalized Quoting Link' section of the page to visit the IFP Online Enrollment tool.
- The link can also be copied and provided to your clients via email, alternate web pages, etc.



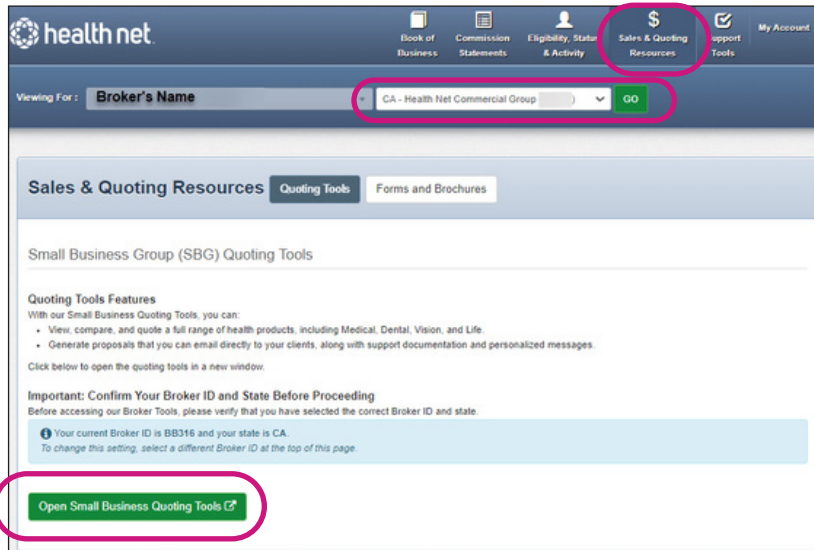
Sales & Quoting Tools

California/Oregon: Commercial Group

To access your Small Business Group (SBG) quoting tools:

- Select the Health Net Commercial Group plan in your dashboard and click **Go**.
- Click Sales & Quoting Resources at the top of your screen. The default landing page will be the Quoting Tools page.
- Click the Open Small Business Quoting Tools button to access the vendor tools.

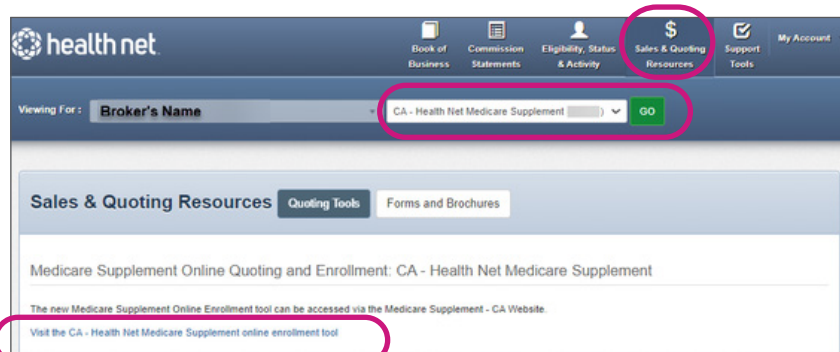
If you have multiple addresses in the contracting system, you may be asked to select which address to send to the quoting tools.



California: Medicare Supplement Online Enrollment

To access CA Medicare Supplement quoting tools:

- Select the CA Medicare Supplement plan on dashboard
- Click **Go**.
- Click 'Sales & Quoting Resources' at the top of your screen.
- The default landing page will be the 'Quoting Tools' page.
- Click the "[Visit the CA - Health Net Medicare Supplement online enrollment tool](#)" link to visit the Medicare Supplement Online Enrollment tool.



Forms and Brochures

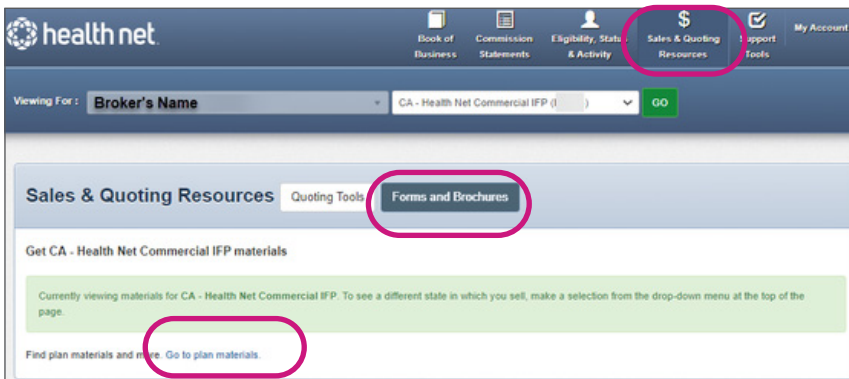
APPLICABLE LINES OF BUSINESS:

CA IFP, COMMERCIAL GROUP, CA MEDICARE SUPPLEMENT

Commercial IFP

To access available Forms and Brochures for a specific plan:

- Select 'Sales & Quoting Resources' at the top of your screen.
 - The default landing page will be the 'Quoting Tools' page.
- Click 'Forms and Brochures' button.
- Documents (if any) that contain confidential & personal information will only be available for access on this page.

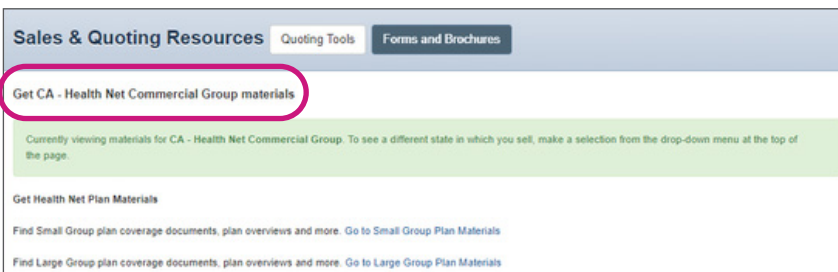


Commercial Group

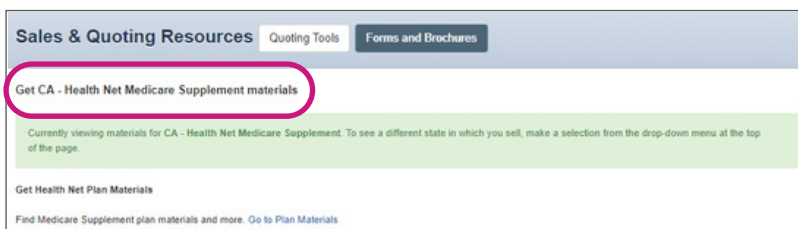
To view the selected plan's forms and brochures:

Click the "Go to plan materials" link.

- You will be redirected to the relevant section of **HealthNet.com** where the selected plan's forms and brochures are posted publicly.



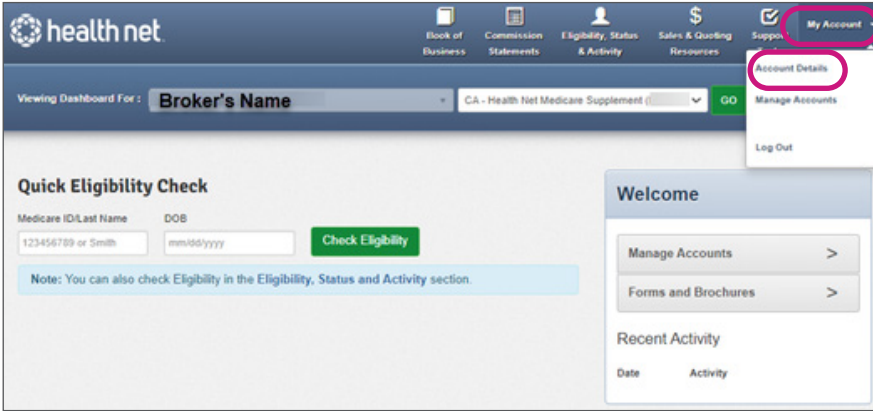
Medicare Supplement



My Account

Viewing Your Account

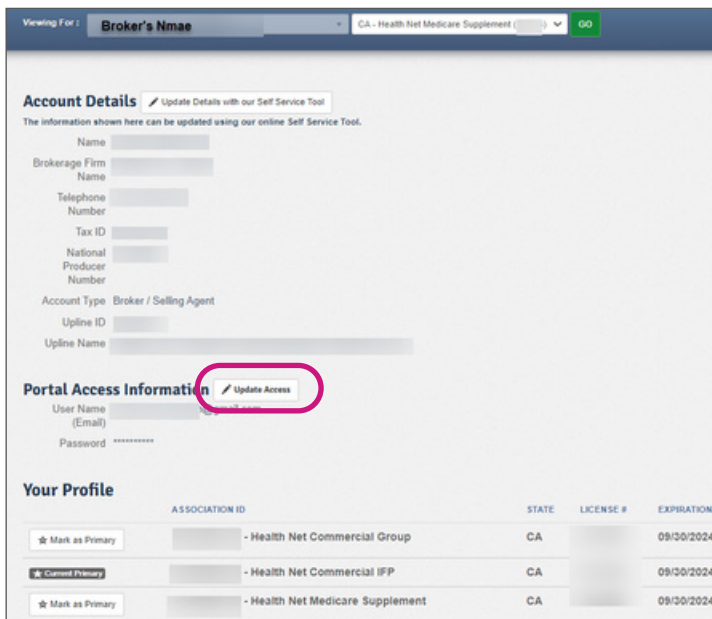
- Click **My Account** located in the upper right corner of the Dashboard to access the drop-down menu.
- Click **Account Details** from the drop-down menu.



These details must be updated in the contracting system

- Name
- Brokerage Firm
- Telephone Number
- Tax ID
- National Producer Number
- Account Type
- Upline ID
- Upline Name

Account Details



Portal Access Information

This information will be managed by the EntryKeyID identity tools. To change your account password, click **Update Access**.

Your Profile

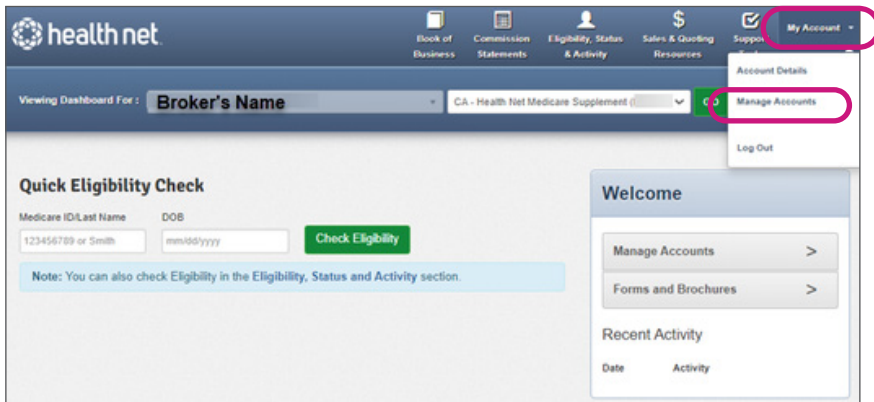
Licenses by state and product, license numbers and license expiration dates.

Under Your Profile, the Current Primary Default state license for the account will be displayed. You can select another state license to Mark as Primary if needed.

Manage Accounts (Create User)

Agency/Upline and Broker/Agent users can use their web accounts to create web accounts for their office staff, and define which tools are available for use. When using this feature, you can disable/enable users, and manage permissions for your account.

- Click **My Account** located in the upper right corner of the Dashboard to access the drop-down menu.
- Click **Manage Accounts** from the drop-down menu.



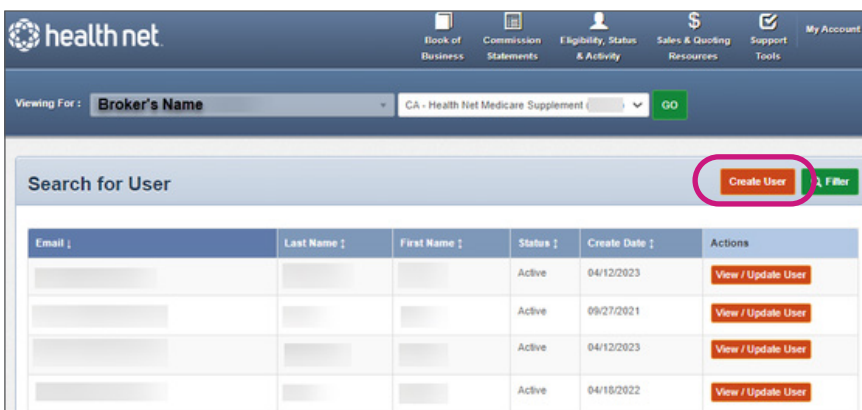
The Manage Accounts option will only apply to the Broker/Selling Agent web accounts.

Action Buttons

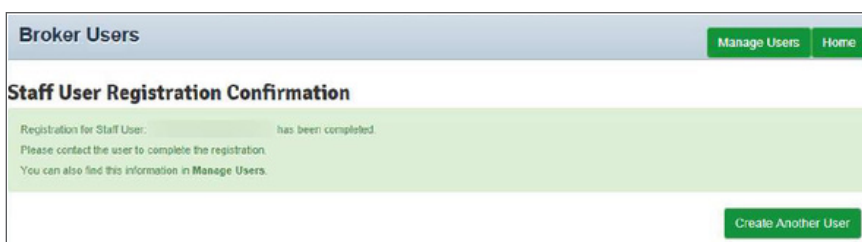
- **Create User**
- **View/Update User:** The ability to view the Office Staff user's account information, or update their account.

Create User

- From the Search for User screen, click **Create User**.
- Enter their First Name, Last Name, Email address and Telephone Number
- Select the tools to which the user will have access and click **Go**.

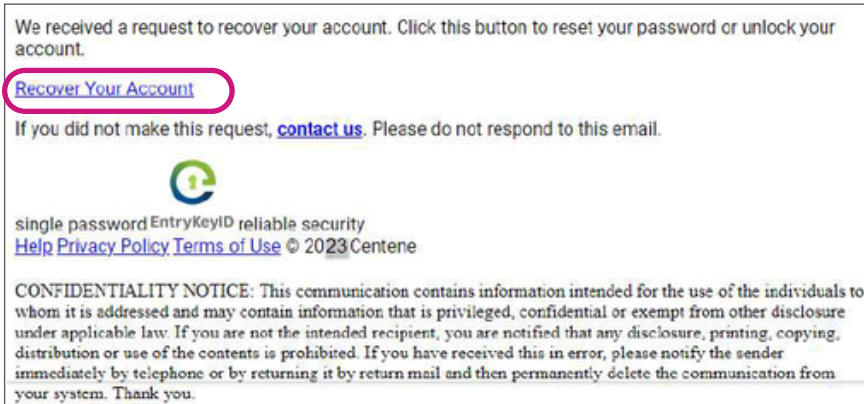


A successful web account creation email was sent when you see the following confirmation message.



Registration Email to Staff User

- The new office staff user will then log into the portal using the email provided. The system will recognize if the user is new, and send the user into Account Recovery.
- The user will need to check their email and click the “Recover Your Account” link.



- The office staff user will need to create their password by resetting wtheir password.

Reset Password

Enter your new password and confirm it.

New Password

Passwords must be at least 8 characters and include three of the four items below:

- One uppercase letter
- One lowercase letter
- One number
- One special character (For example: &, \$, !, *)

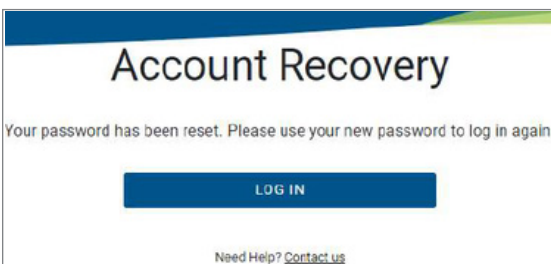
Confirm New Password

[RESET PASSWORD](#)

[CANCEL](#)

Need Help? [Contact us](#)

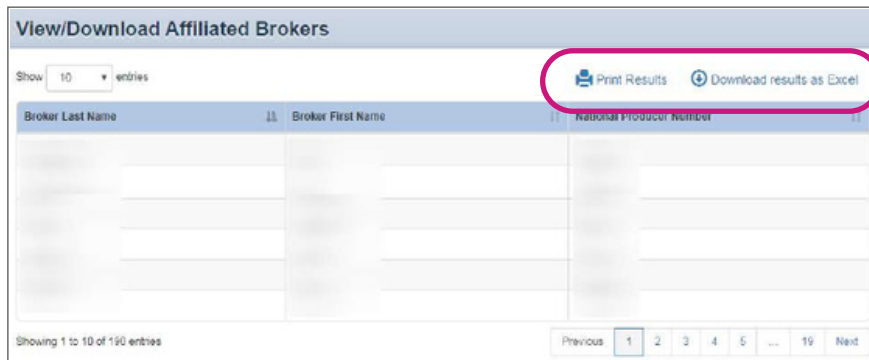
- Upon successfully resetting/creating the password, the new office staff user can login to the portal.



Affiliated Brokers List

For Agency/Upline web accounts, you can view a list of all your affiliated brokers without having to scroll through your dashboard drop-down list.

- Click My Account located in the upper right corner of the Dashboard to access the drop-down menu.
- Click Affiliated Brokers List from the drop-down menu.



The list of affiliated brokers can be downloaded and exported.

Log Out

- Select the drop-down arrow next to My Account in the upper right corner.
- Select **Log Out**.