Premier Access®

Broker
Portal User Guide

Contents

Introduction

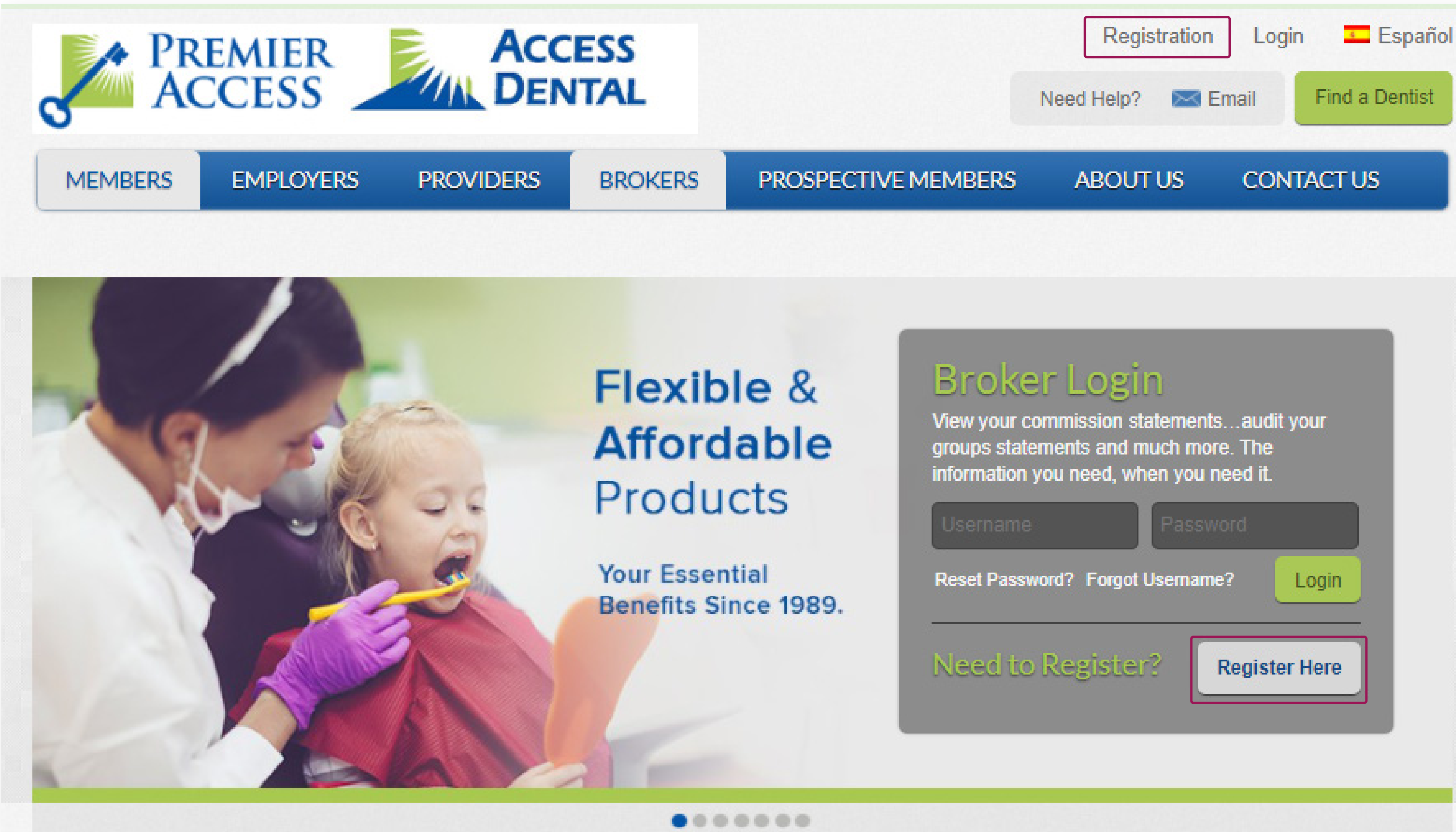
Welcome to Premier Access and this guide, which explains how to use the broker portal at www.premierlife.com. While the website was designed to be intuitive, having this guide by your side will make it even easier to manage your dental groups. Screen shots will show you the way everything appears online to eliminate any doubt. Let's get started!

Welcome Page

As a broker, you'll be able to access login and useful links through the welcome page.

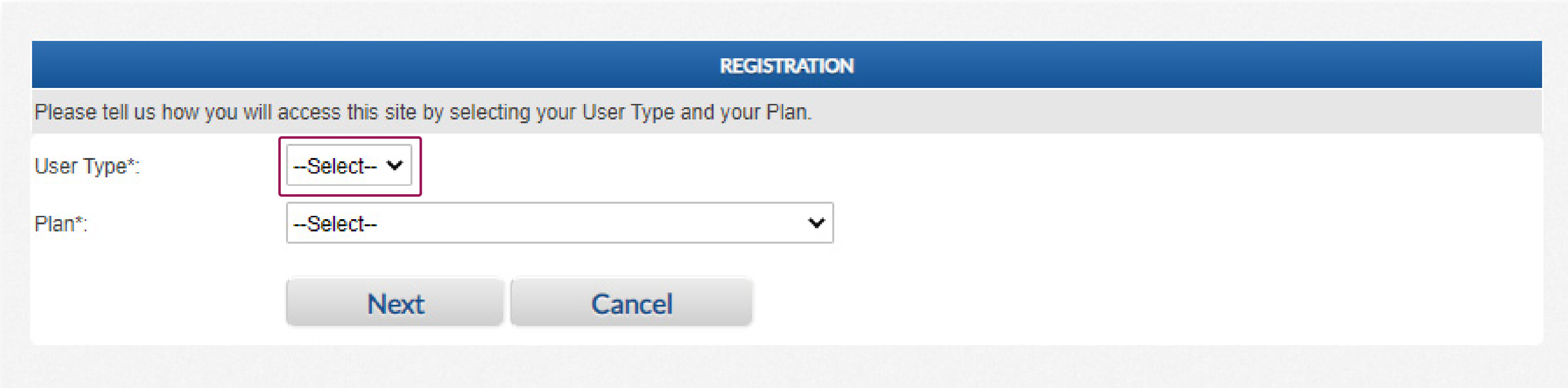
Registration

1. If you are registering as an agency administrator, click **Register Here** on the Broker Login page. If you are registering as an individual broker, please contact your agency for a login request.

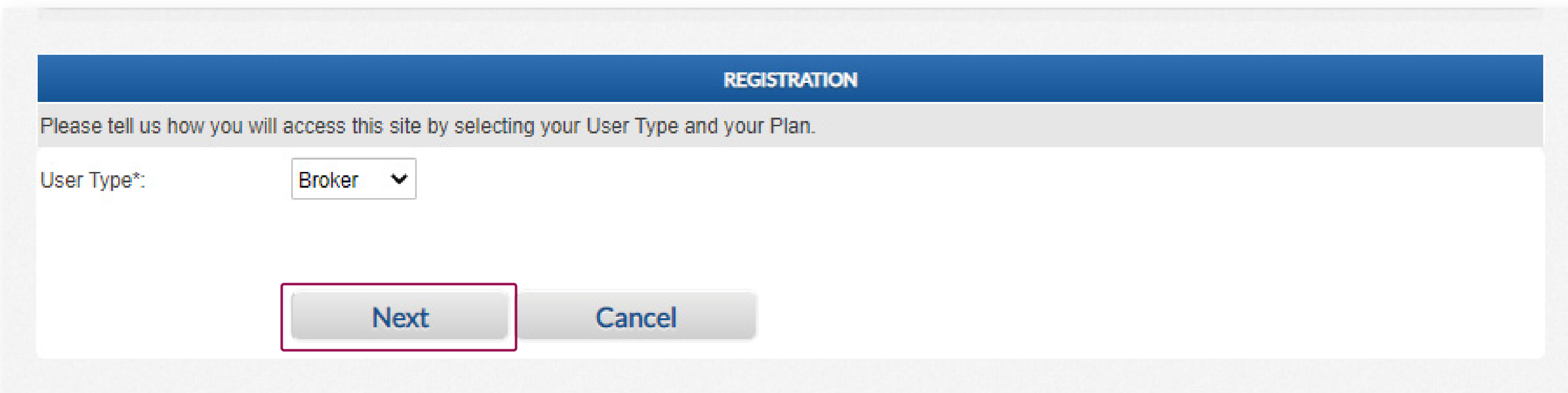


Registration

2. Select your user type as **Broker**. The **Plan** field will disappear once you select **Broker** in the User Type drop-down.

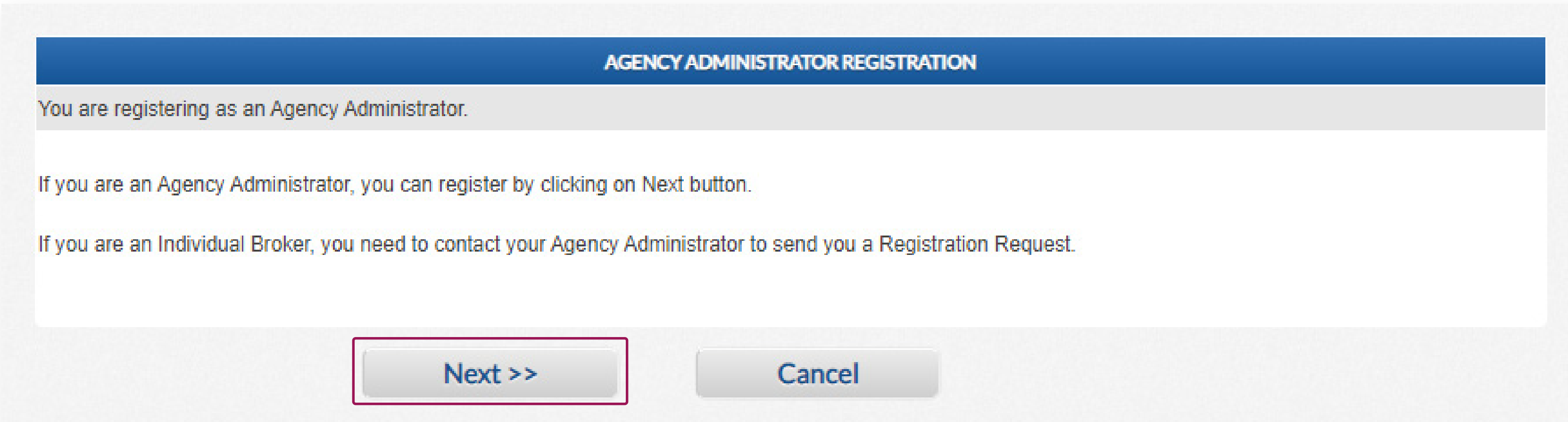


3. Click **Next**.



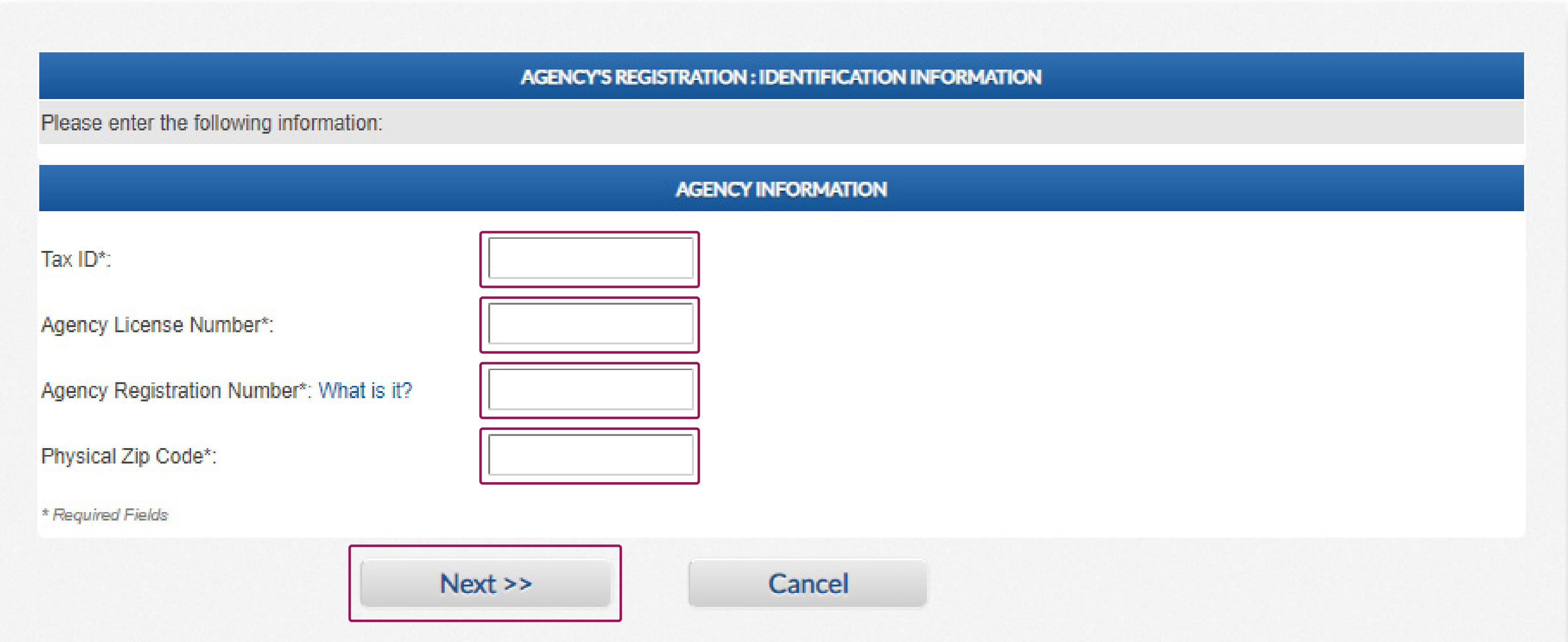
Registration

4. If you are requesting access as the administrator for an agency, you may register by clicking **Next**. Individual brokers must contact your agency administrator for a registration request.



Registration

5. Complete the required fields with your tax ID number, agency license and registration numbers, and your ZIP code. Click **Next** to continue.



6. You should get a message that your registration was a success.

Navigation

At the top navigation bar, you can request a quote, view your commissions, check group and member information, access forms, or manage your broker account.

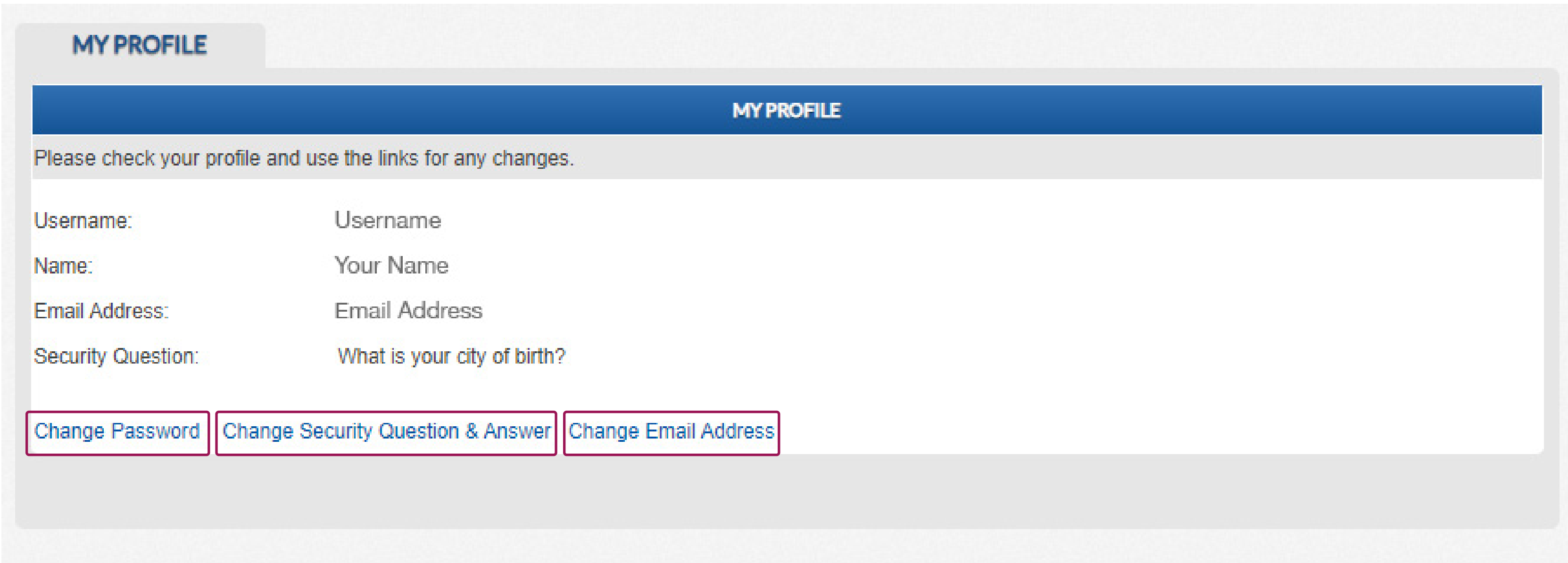
From the tile panel, you can view your account, find a dentist, see your commission statement, view your groups, check member eligibility, and review member benefits.

My Account

To view your own profile, click the **My Account** tile on the dashboard or click **Welcome [Your Name]** at the top right corner.

My Account

You'll see your username, name, email address, and security question and will be able to change your password, your security question and answer, or your email address by clicking the blue links.

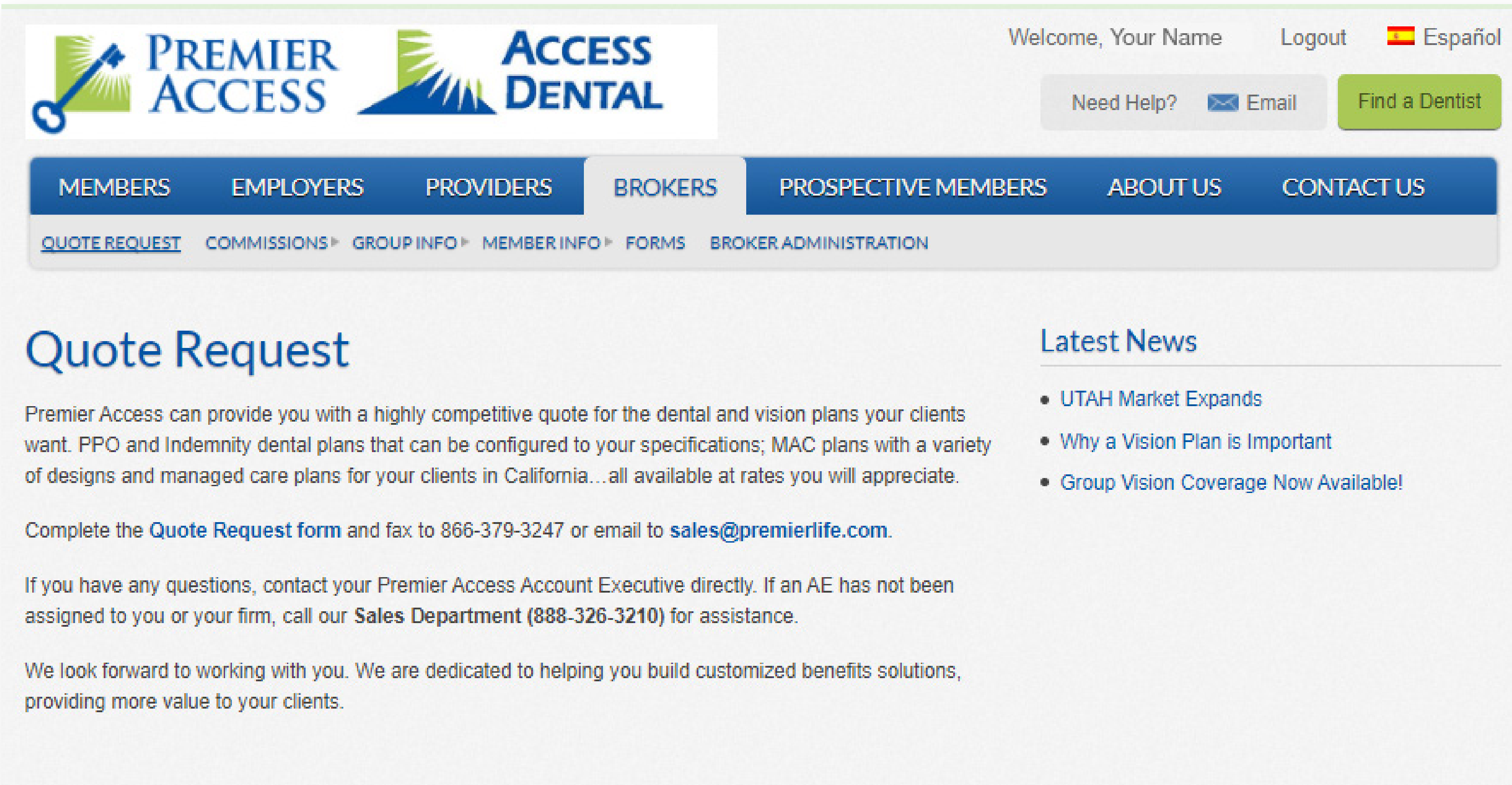


Quote Request

Click on **Quote Request** from the top navigation bar for instructions on how to receive a quote.

Quote Request

On the **Quote Request** page, you'll find instructions for how to submit a quote request. From this page, you can also click on the latest news in the right panel.

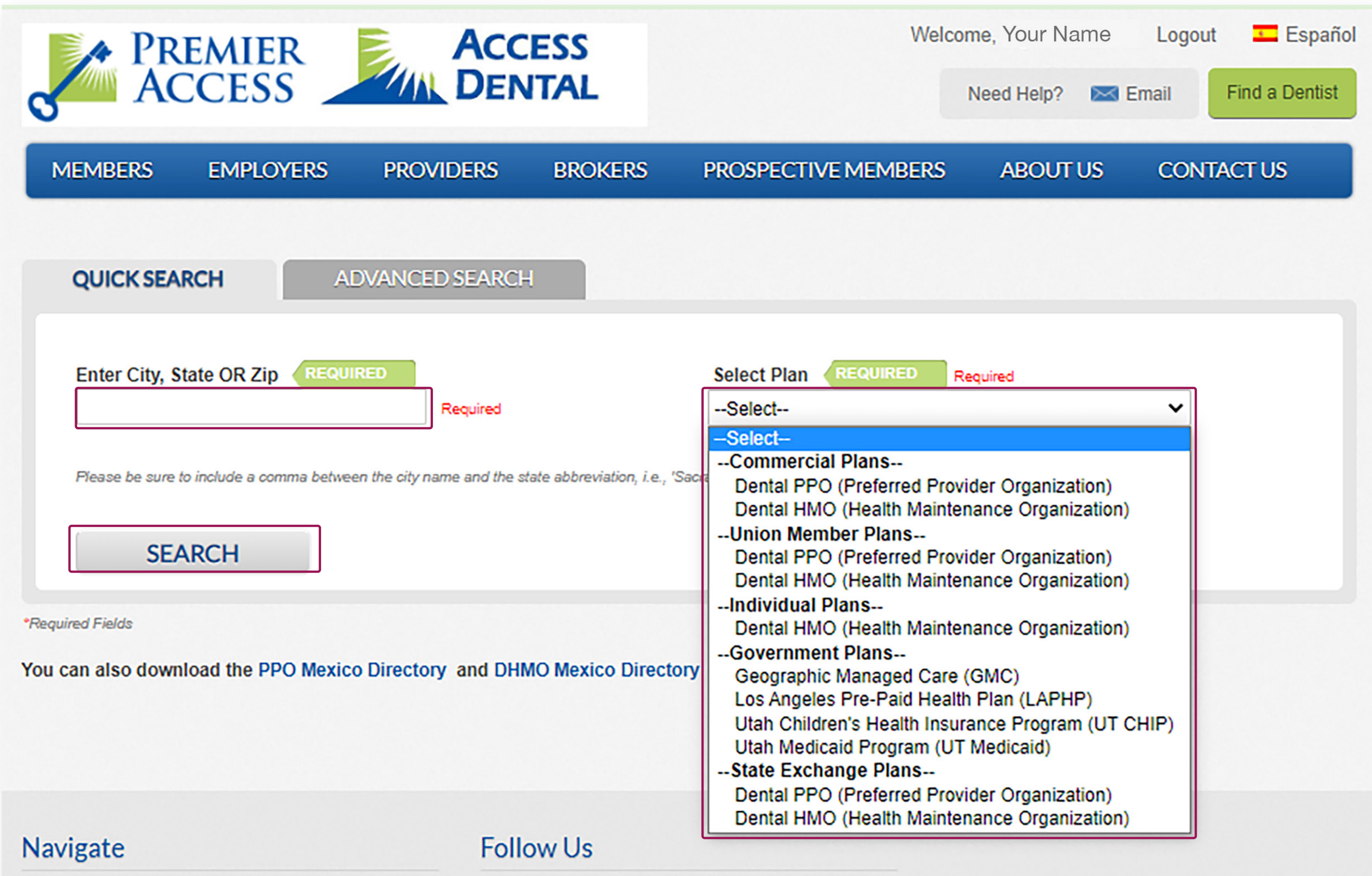


Find a Dentist

To find a dentist, click the **Find a Dentist** tile on the dashboard or click the **Find a Dentist** button in the top right corner.

Find a Dentist

Locate a provider by city, state, or ZIP. You can select providers by the type of plan, too, using the drop-down menu.

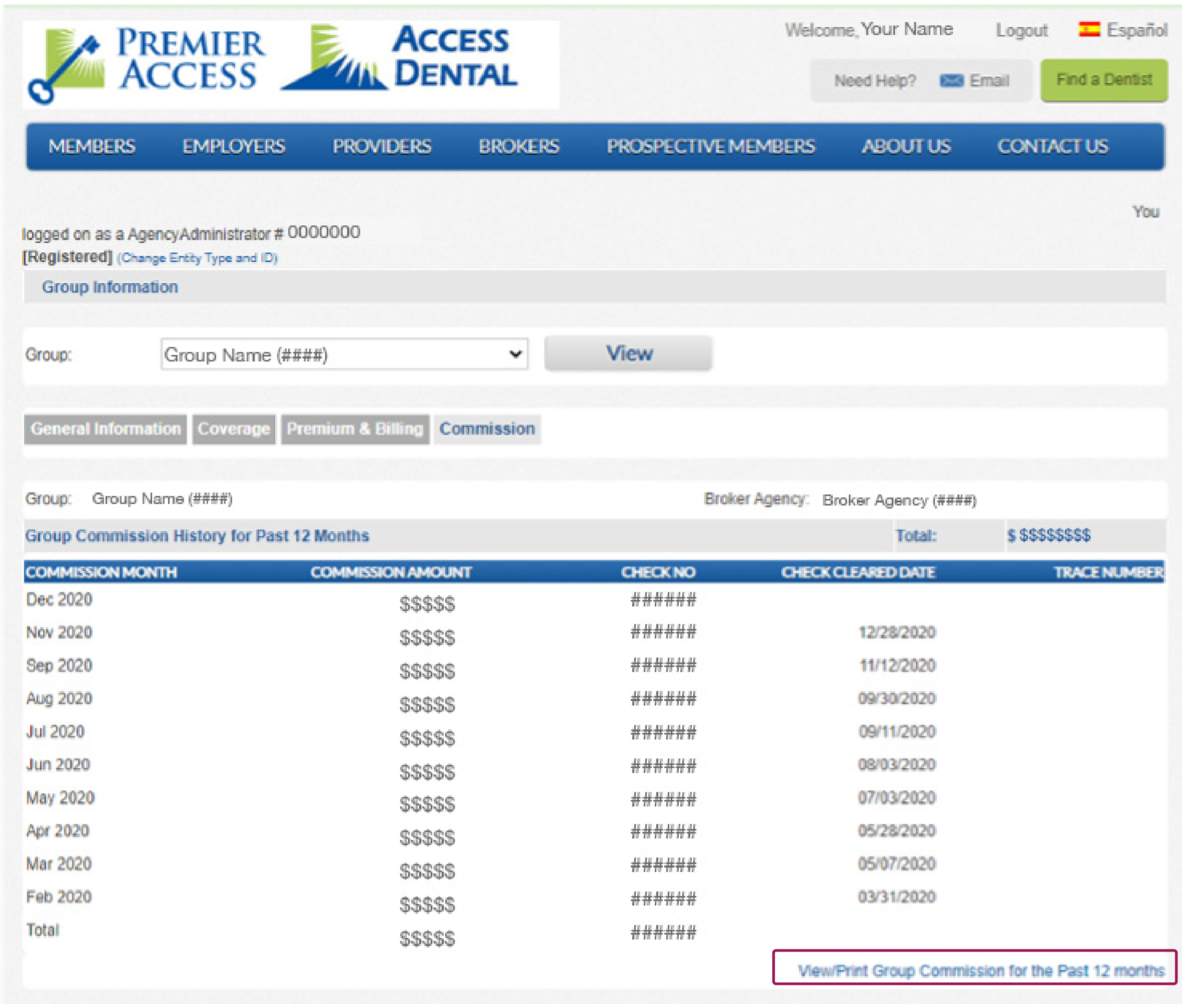


Commission Statement

To view commission statements, Click **Commissions** in the top navigation bar or **Commission Statement** in the tile to the right of the screen. The top navigation bar offers a drop-down menu so that you may view either Group Commissions or Individual Plan Commissions.

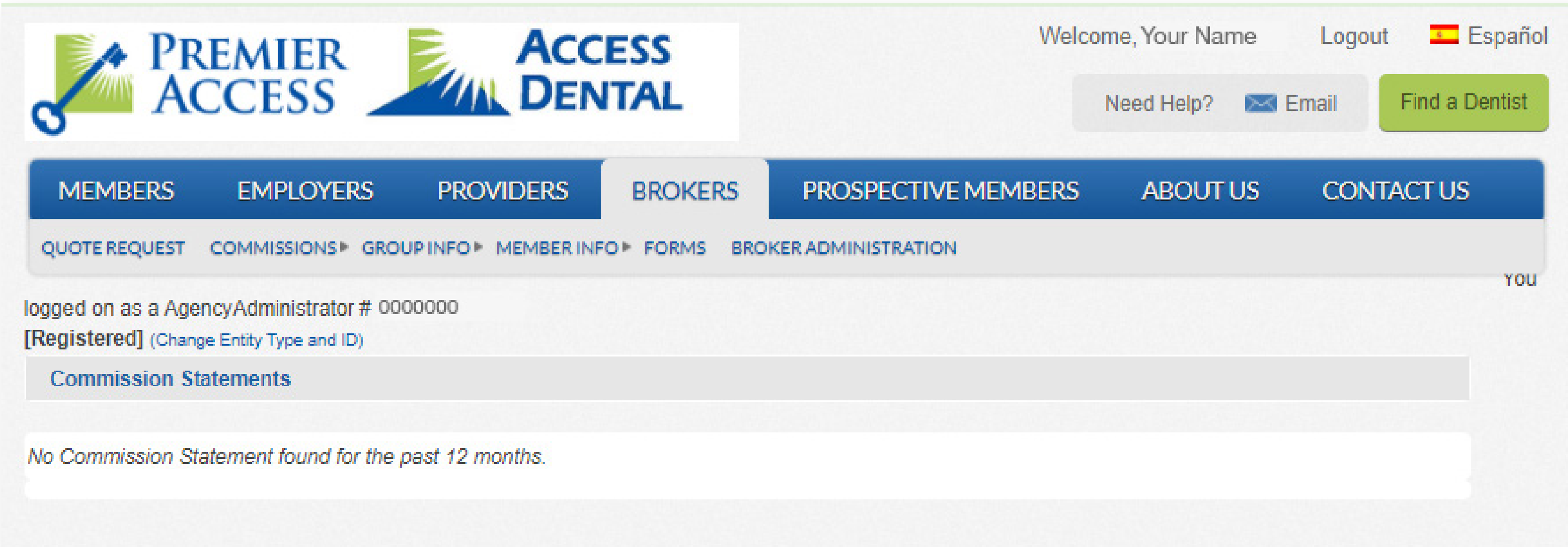
Commission Statement

Click **Group Commissions** to view them. To view or print the page, click the blue View/Print notice at the bottom of the screen.



Commission Statement

Click **Individual Plan Commissions** to view those.

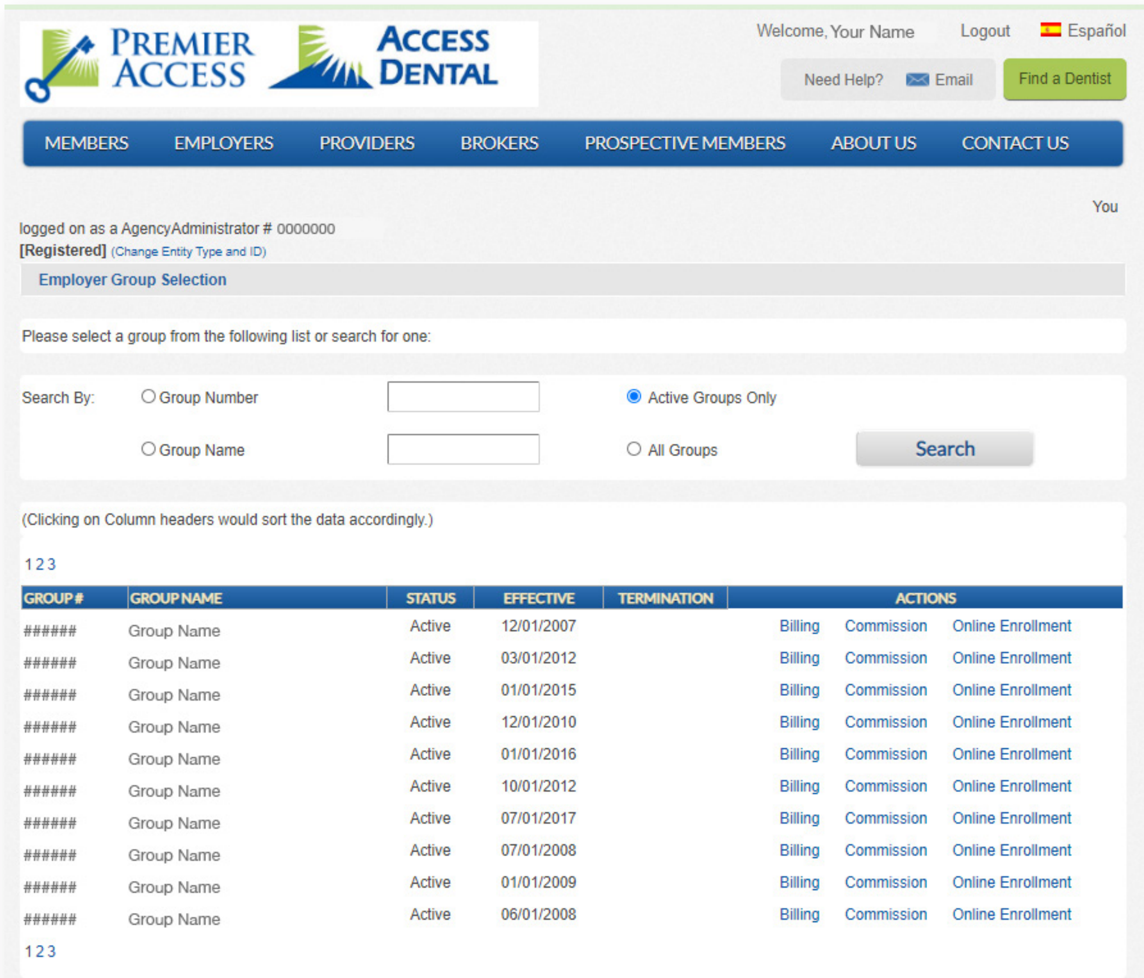


Group Info

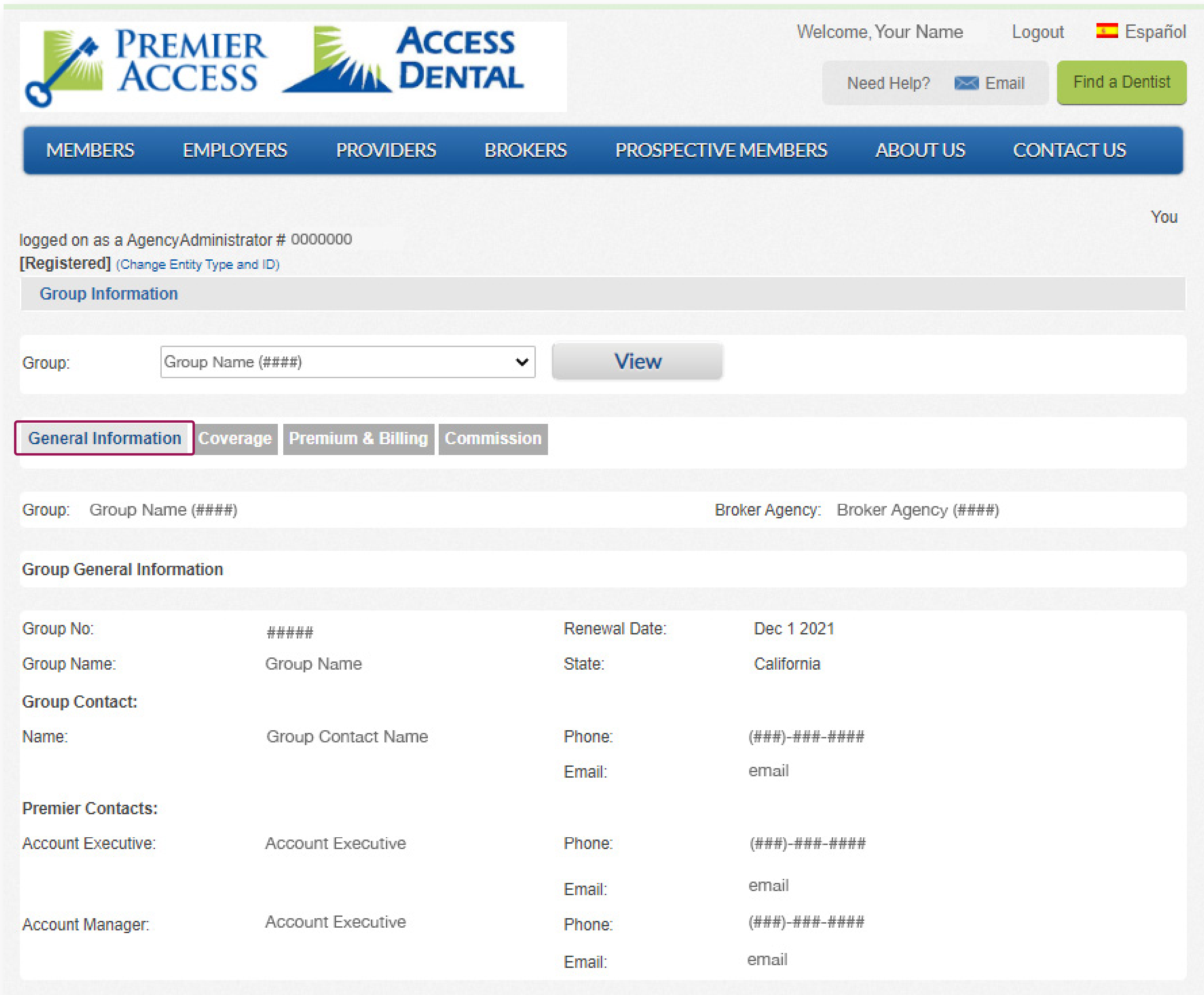
You'll be able to view information for all the groups currently enrolled with us. Simply click **Group Info** from the top navigation bar or **My Groups** from the tile on the right side of the page. From the top navigation bar, you can select your group (Group Selection), and see General Info, Coverage, Billing, Commissions, and Online Enrollment.

Group Info

Simply select the name of the group for which you want to view this information. Once you make your selection, you'll then see various options for viewing: General Information, Coverage, Premium & Billing, and Commission.

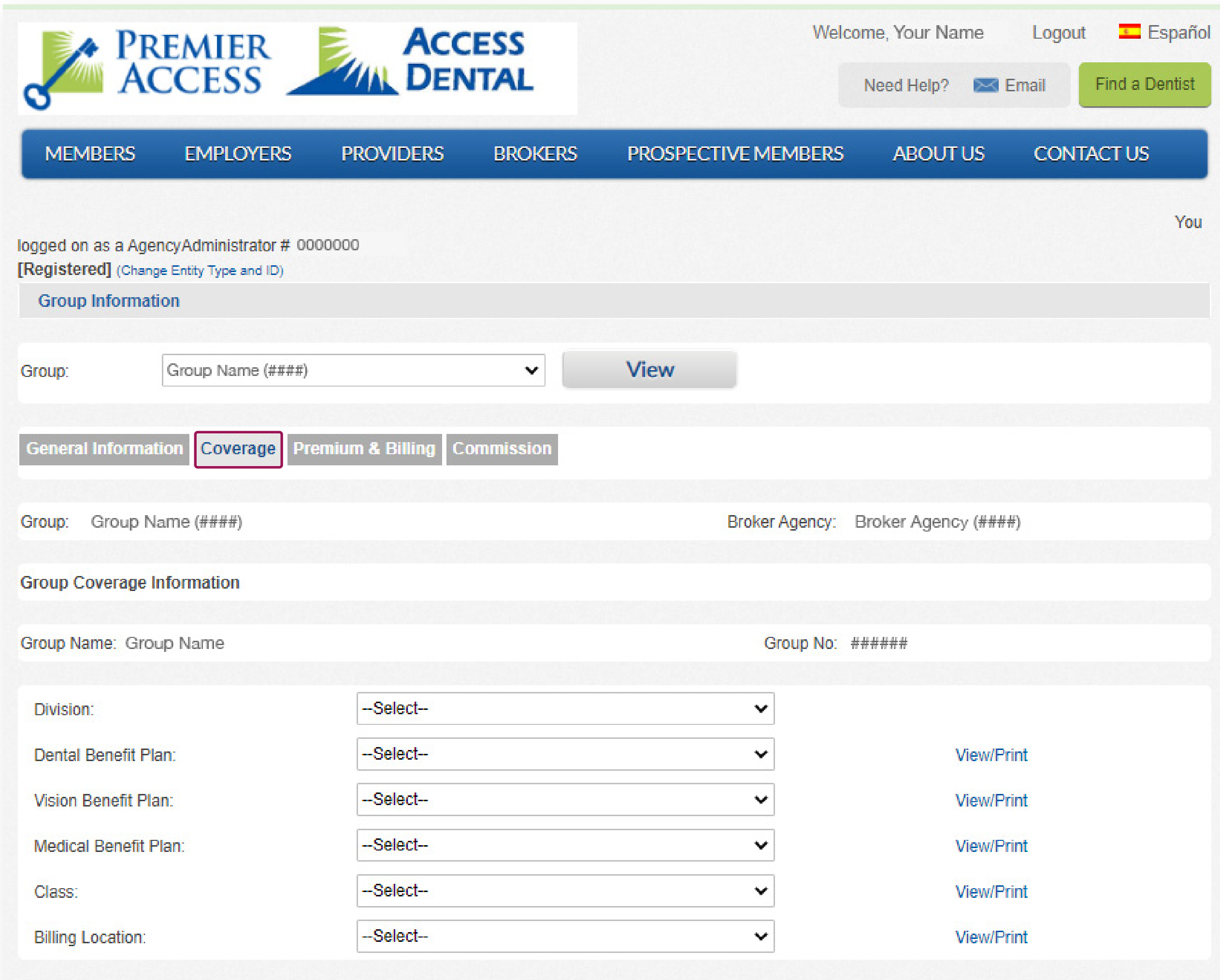


Group Info
General Information



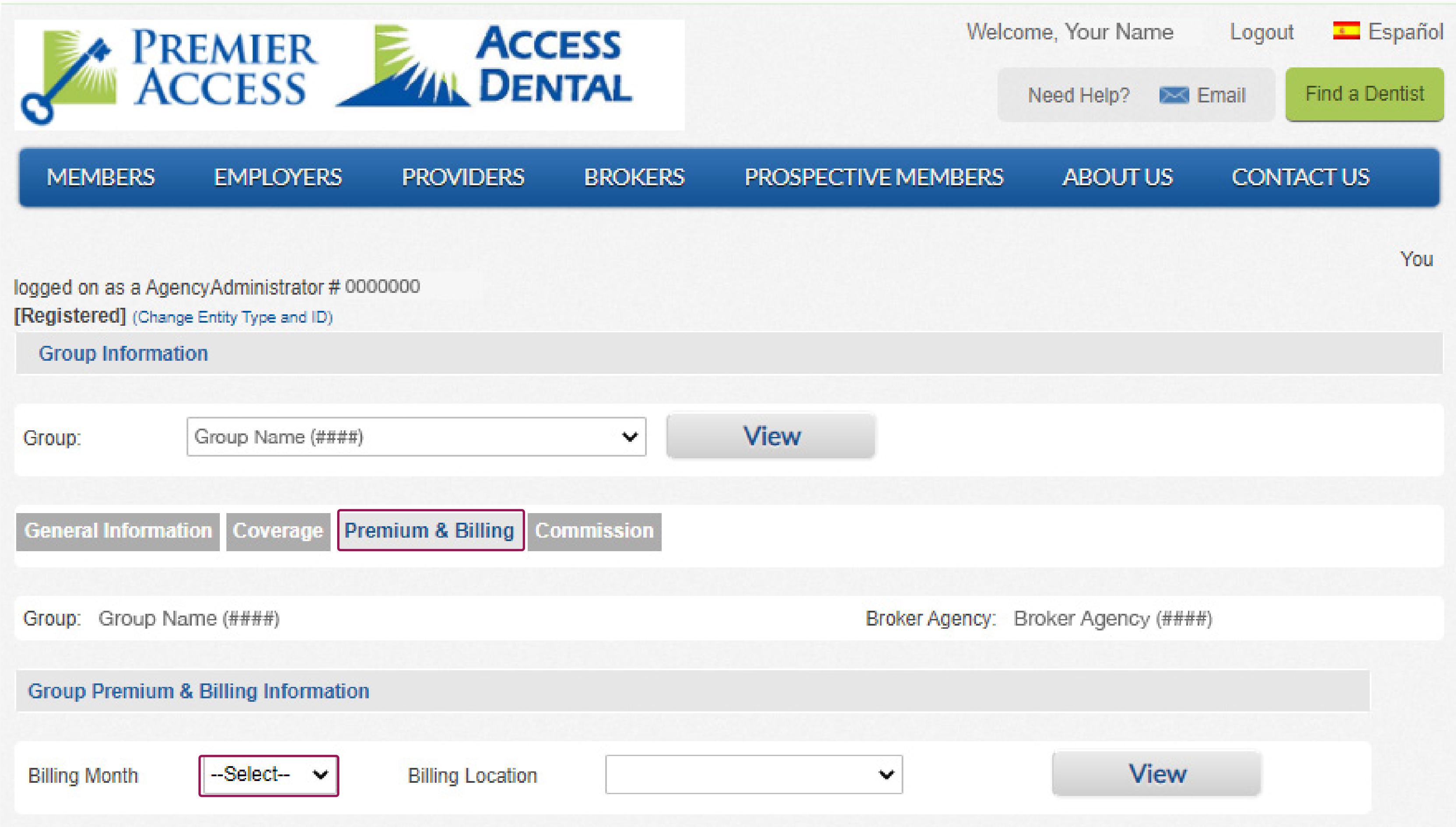
Group Info
Coverage

Use the dropdowns to view the group's various plan coverage amounts.



Group Info
Premium and Billing

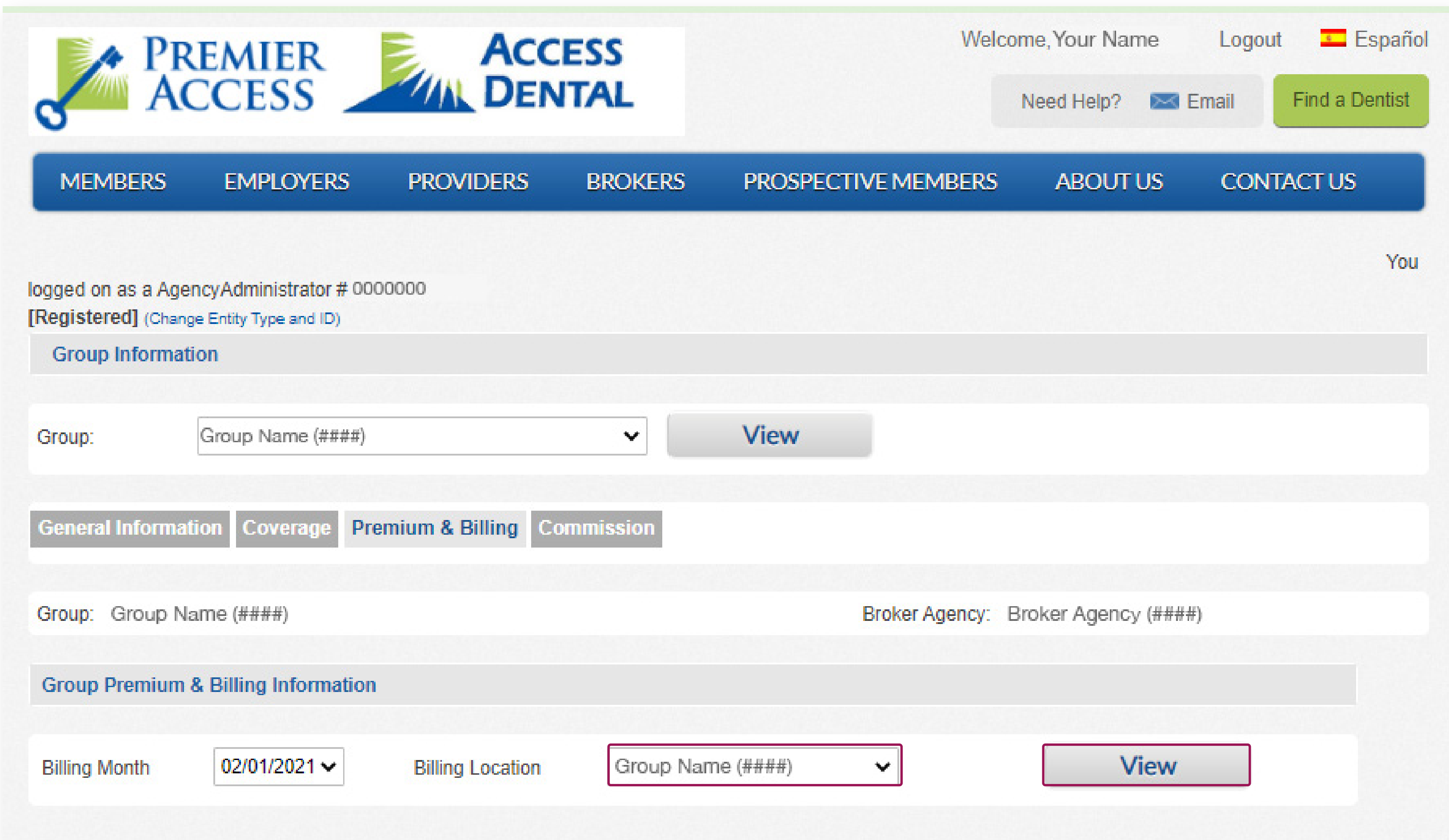
1. Select the Billing Month from the drop-down menu.



Group Info

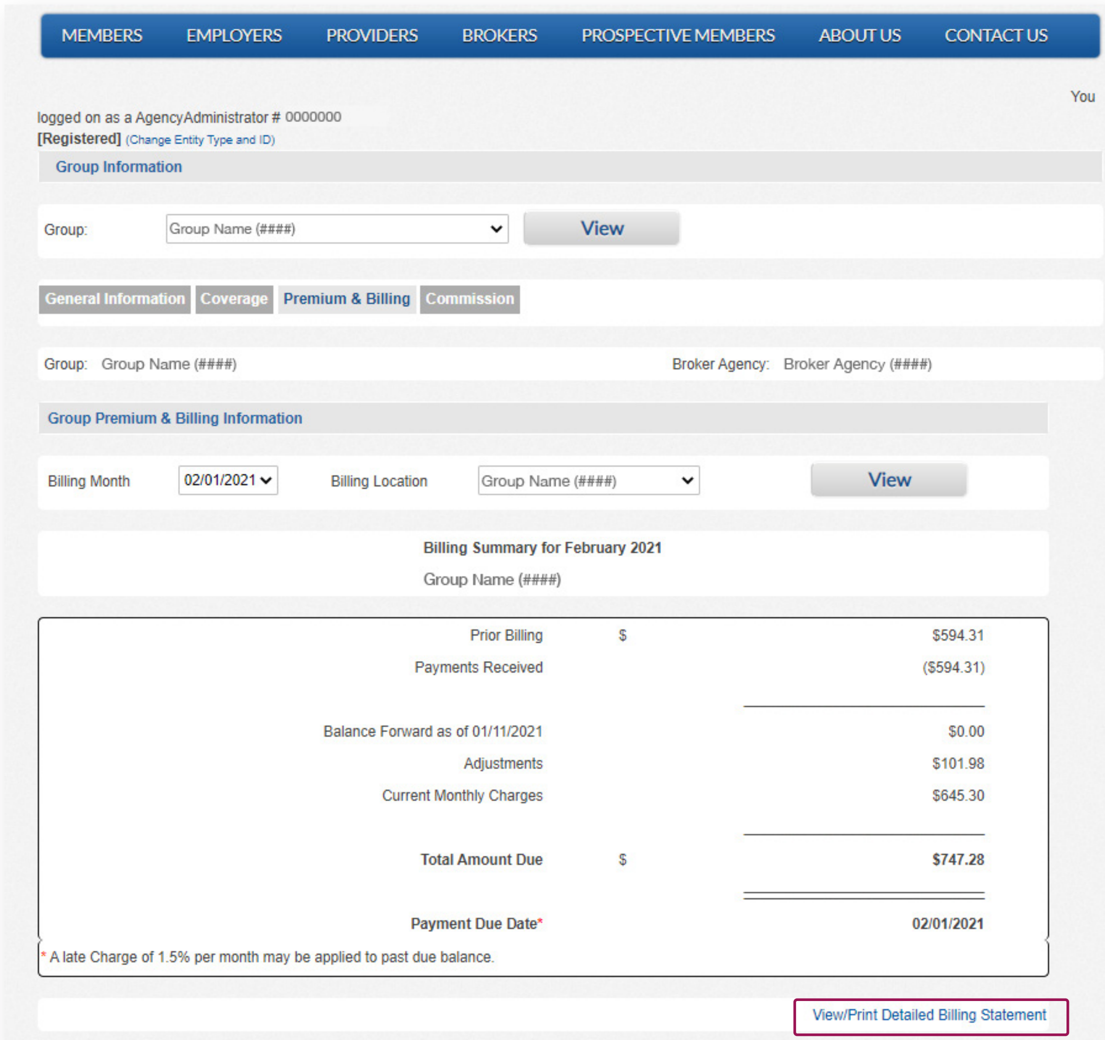
Premium and Billing

2. Select the Billing Location from the drop-down menu. Click View to see the invoice.



Group Info
Premium and Billing

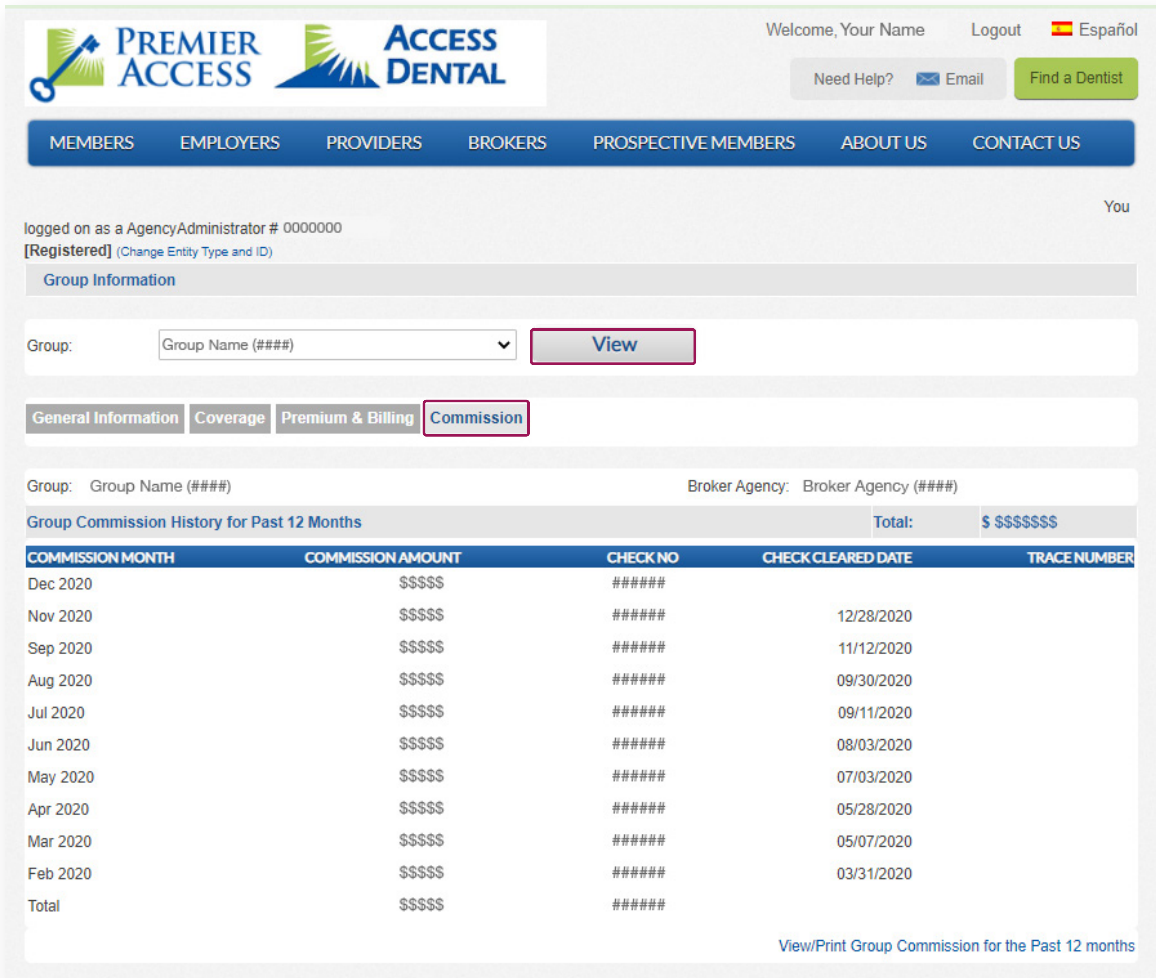
3. The invoice will appear on the next screen. Use the blue prompt at the bottom of the page to print.



Group Info

Commission

Click to view the commissions for this group.

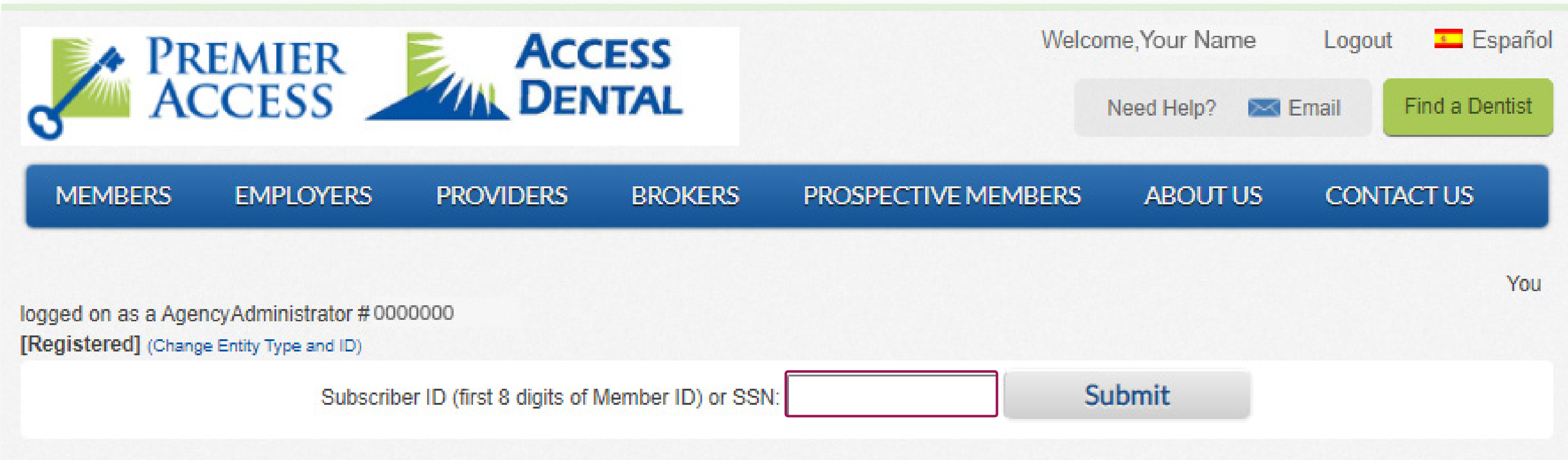


Member Info

From **Member Info** in the top navigation bar, you can select Eligibility, Benefits, and ID Cards from the drop-down menu. Alternately, use the dashboard tiles to select Member Eligibility or Member Benefits.

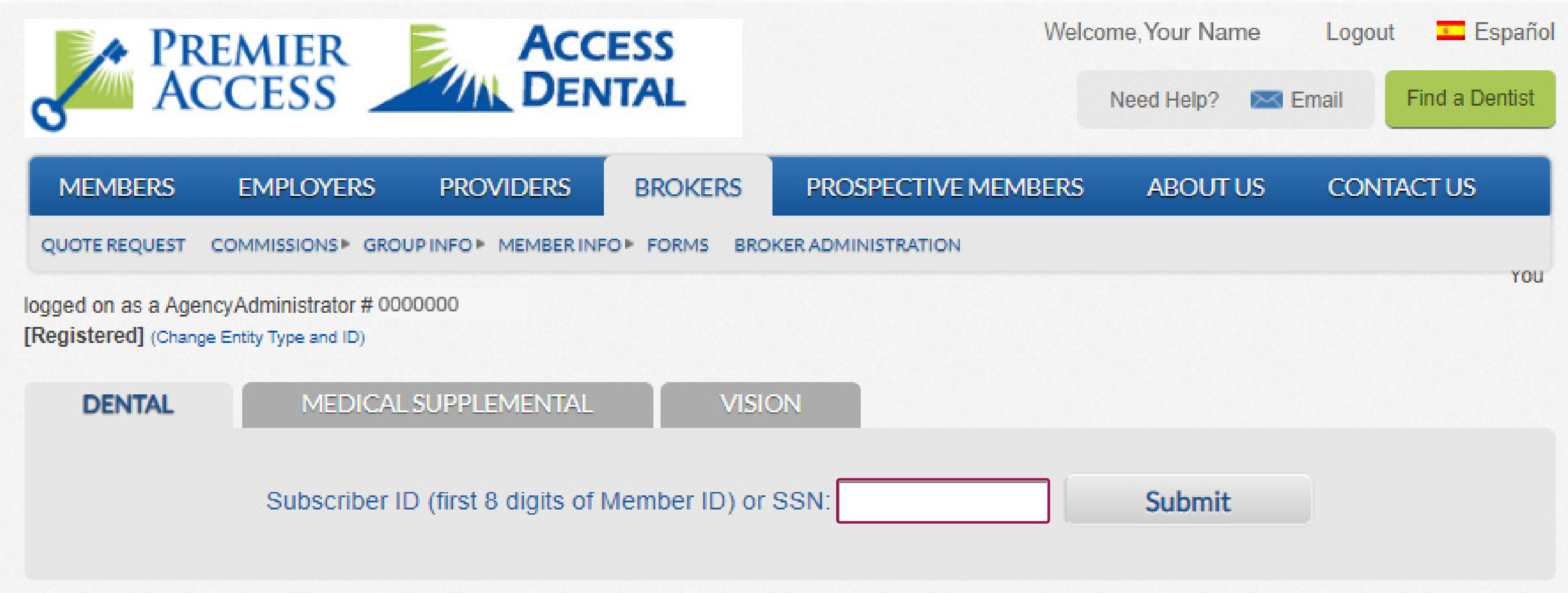
Member Info

To access any member information about benefits or eligibility, you'll need the subscriber's ID or social security number.



Member Info

You can also view member ID cards for dental, supplemental medical, and vision with the subscriber's ID or social security number.



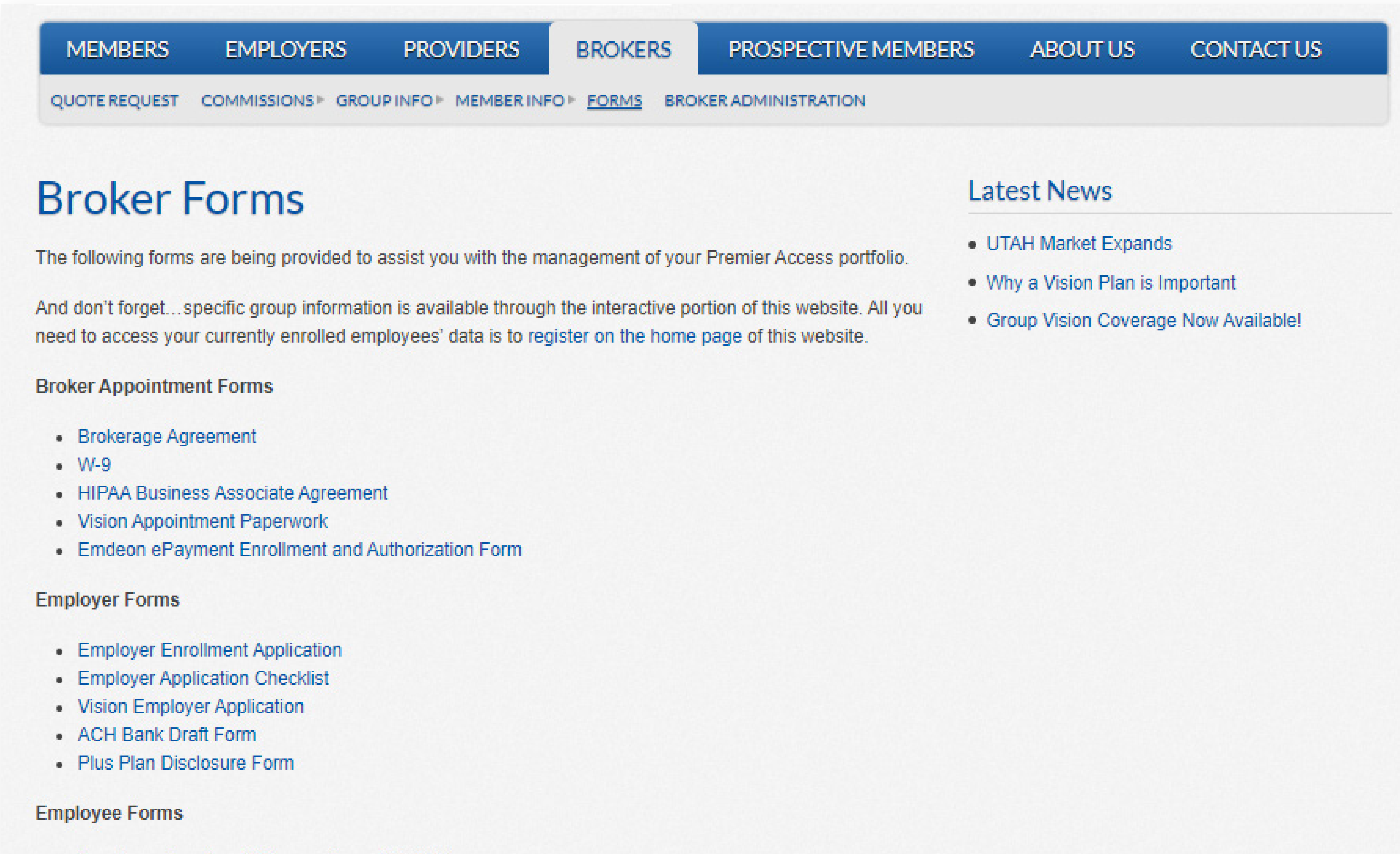
Forms

As a broker, you have a complete set of broker appointment, employer, and employee forms available to you.

1. Simply click **Forms** in the top navigation bar.

Forms

2. Next, locate the form you need and click on it.


MEMBERS | EMPLOYERS | PROVIDERS | BROKERS | PROSPECTIVE MEMBERS | ABOUT US | CONTACT US

QUOTE REQUEST | COMMISSIONS | GROUP INFO | MEMBER INFO | FORMS | BROKER ADMINISTRATION

Broker Forms

The following forms are being provided to assist you with the management of your Premier Access portfolio.

And don't forget…specific group information is available through the interactive portion of this website. All you need to access your currently enrolled employees' data is to register on the home page of this website.

Broker Appointment Forms

- Brokerage Agreement
- W-9
- HIPAA Business Associate Agreement
- Vision Appointment Paperwork
- Emdeon ePayment Enrollment and Authorization Form

Employer Forms

- Employer Enrollment Application
- Employer Application Checklist
- Vision Employer Application
- ACH Bank Draft Form
- Plus Plan Disclosure Form

Employee Forms

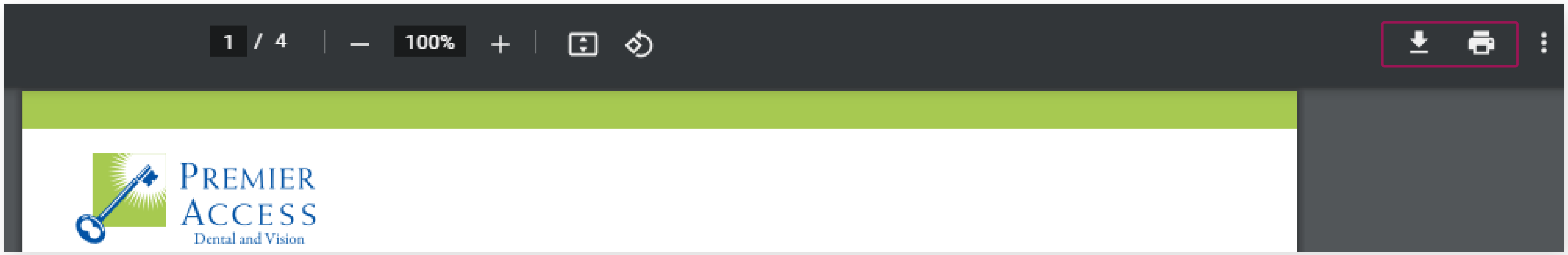
- Employee Enrollment/Change Form (English)

Latest News

- UTAH Market Expands
- Why a Vision Plan is Important
- Group Vision Coverage Now Available!

Forms

3. The form will open in a new window, and you'll be able to download and save it to your desktop or print the form by clicking the download or print icons at the top right of the page.

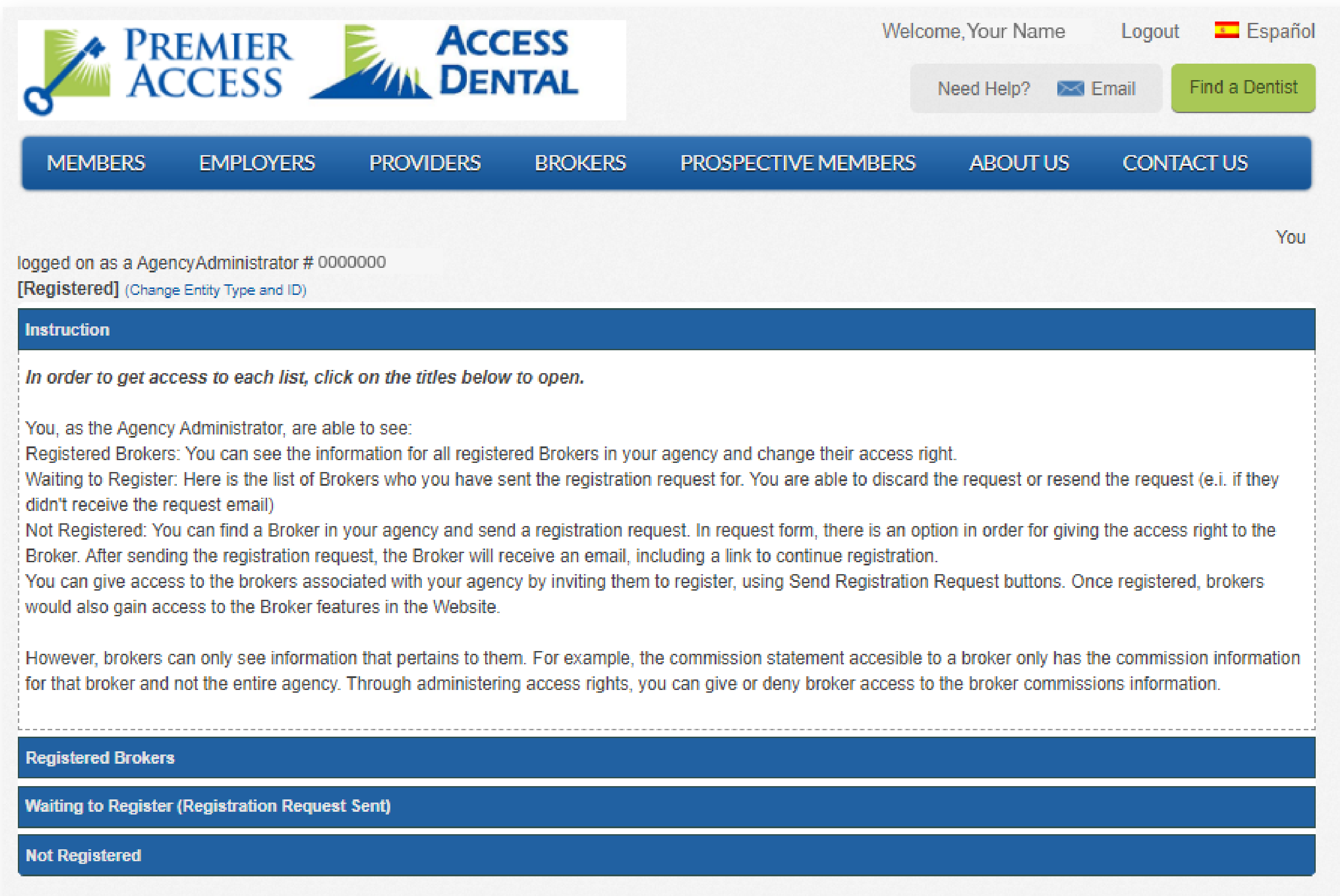


Broker Administration

To manage the brokers in your agency, click **Broker Administration** from the top navigation bar.

Broker Administration

The next screen offers instructions for managing the brokers in your agency, finding out who is registered, waiting to register, or not registered.



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