Welcome to the Broker Portal User Guide

This User Guide was created to help anyone who will be working with the Broker portal. Throughout the guide, please be aware of these references:

Here is a list of symbols that you will see in the Guide:

Delete	Phone Number	Email Address	Print
Fax	Social Media	Drop Down Menu	Settings

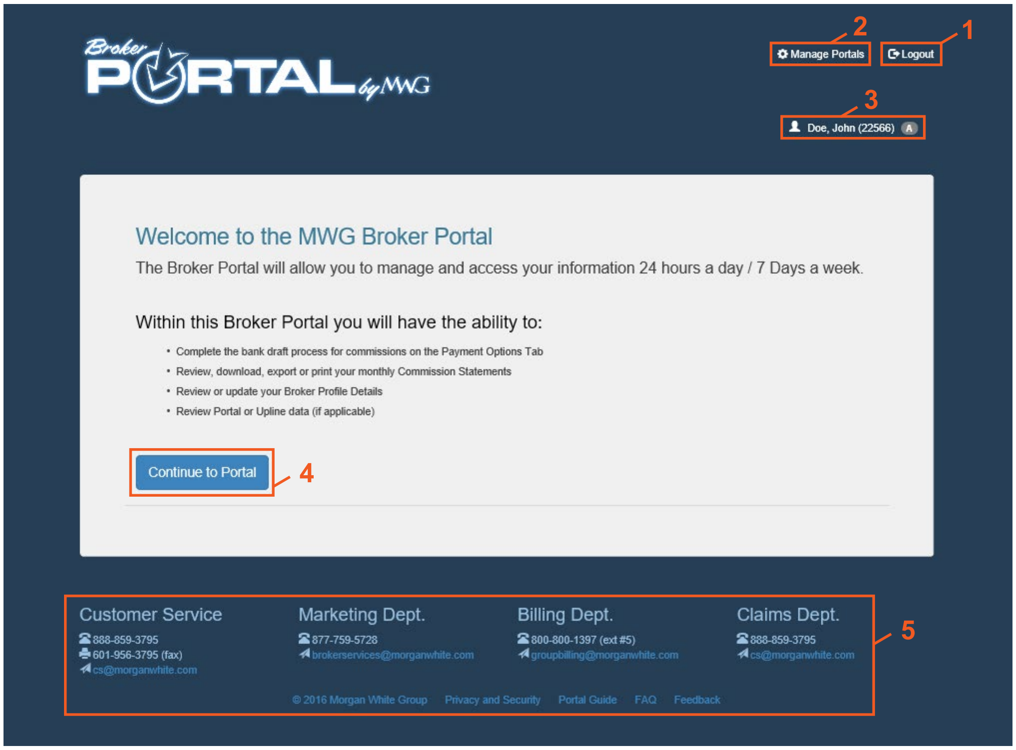
Please Note: When in the portal, you may come across boxes that are greyed-out. This indicates information that cannot be edited.

Agent#
22566

Reminder- You can access the Broker Portal User Guide or FAQ at the bottom of the website at any time.

The Broker Portal URL: brokers.mwadmin.com

Upon entering the Broker Portal, the first thing you will see is the landing page.



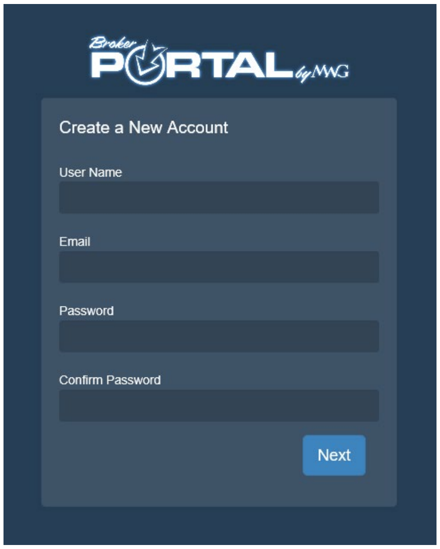
1. Logout Link-Click to log out of the portal.

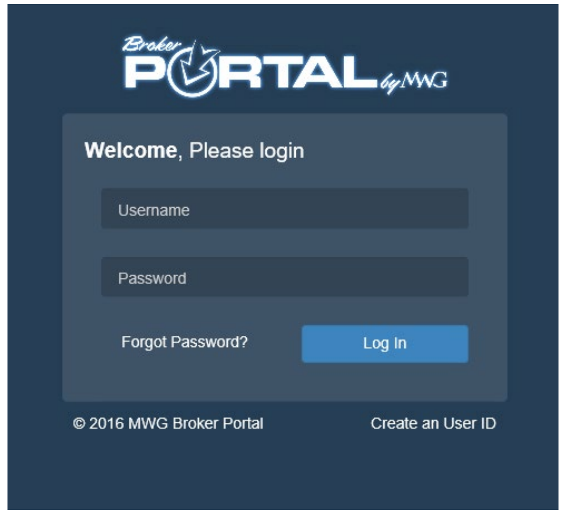
2. Manage Portals- Here is where you can change your email or password.

3. This is your Username

4. Click here to enter the Broker Portal

5. Contact information





To Register for the First time:

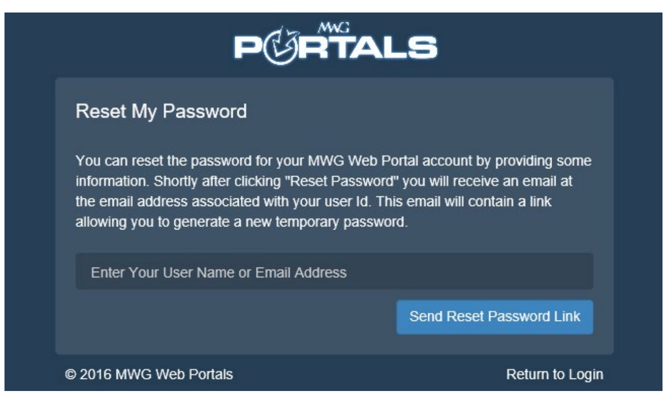
If you are registering for the first time, click the “Click Here” button to create a new account. The second screen will request you Date of Birth and the last four digits of your Social Security number. The DOB and SSN **MUST MATCH** the information in our system.

If you receive multiple error messages, please contact your Broker Services representative to assist with registering more than one portal in our system.

To Log in:

Click the “Log In Here” button to log on as an existing user. Enter your information and click “Log In”

To Reset you Password

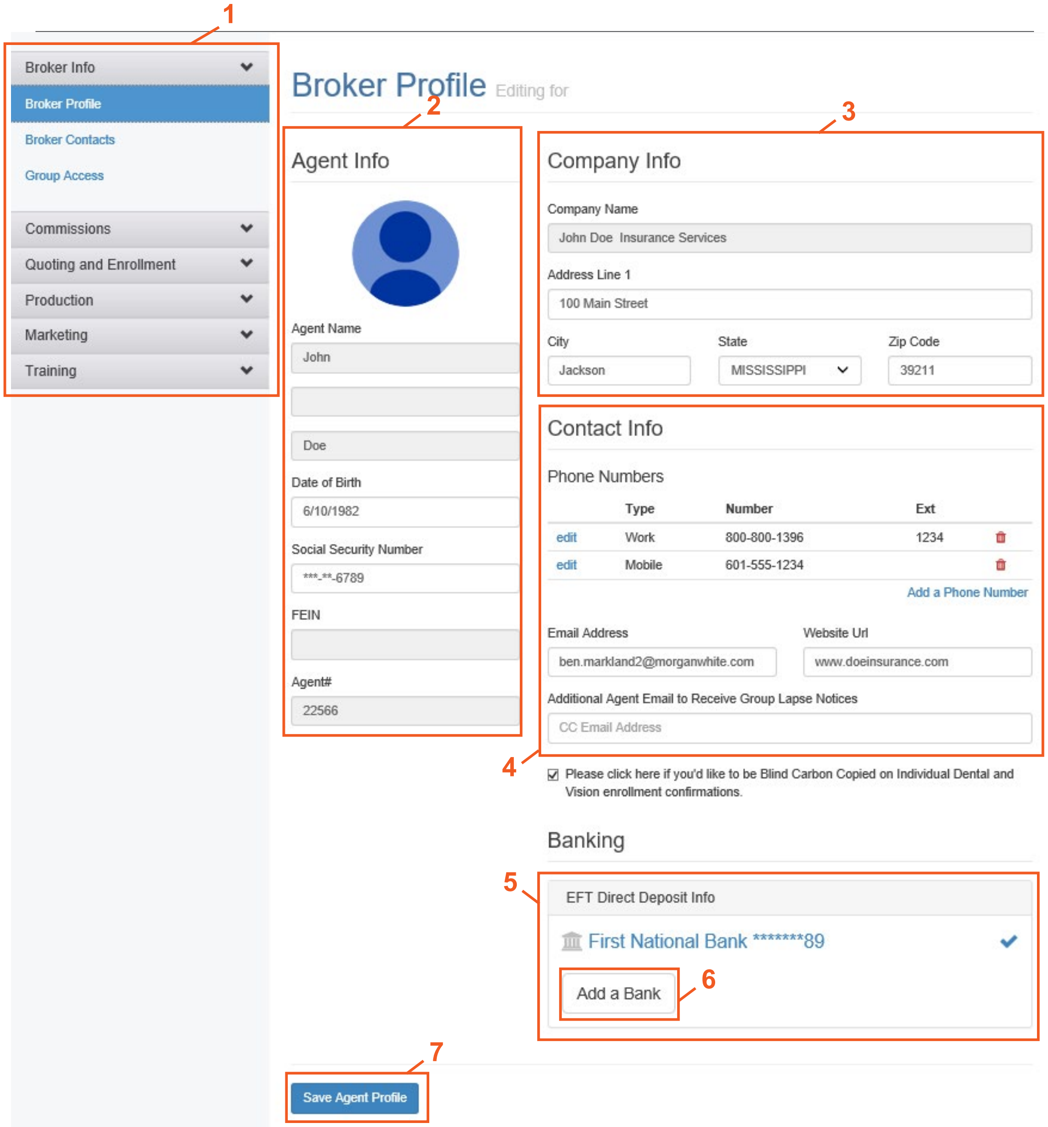


If you forget your password, click the “Forgot Password” Link. Enter your email or username and click “Send Reset Password” link.

Your username must match the email address used in the initial registration. If you receive an error message when you attempt to log in, try another email address you may have used when you first registered in the portal. Once you enter the correct username/password, an email will be sent to that email address. This will grant you access and provide instructions on resetting your password.

Inside the Portal

Once inside the portal, there are a few things to make note of here. First, the tool bar of options is located on the left hand side of the screen. Once a tab is clicked, the information will appear in the white area next to the tool bar.v

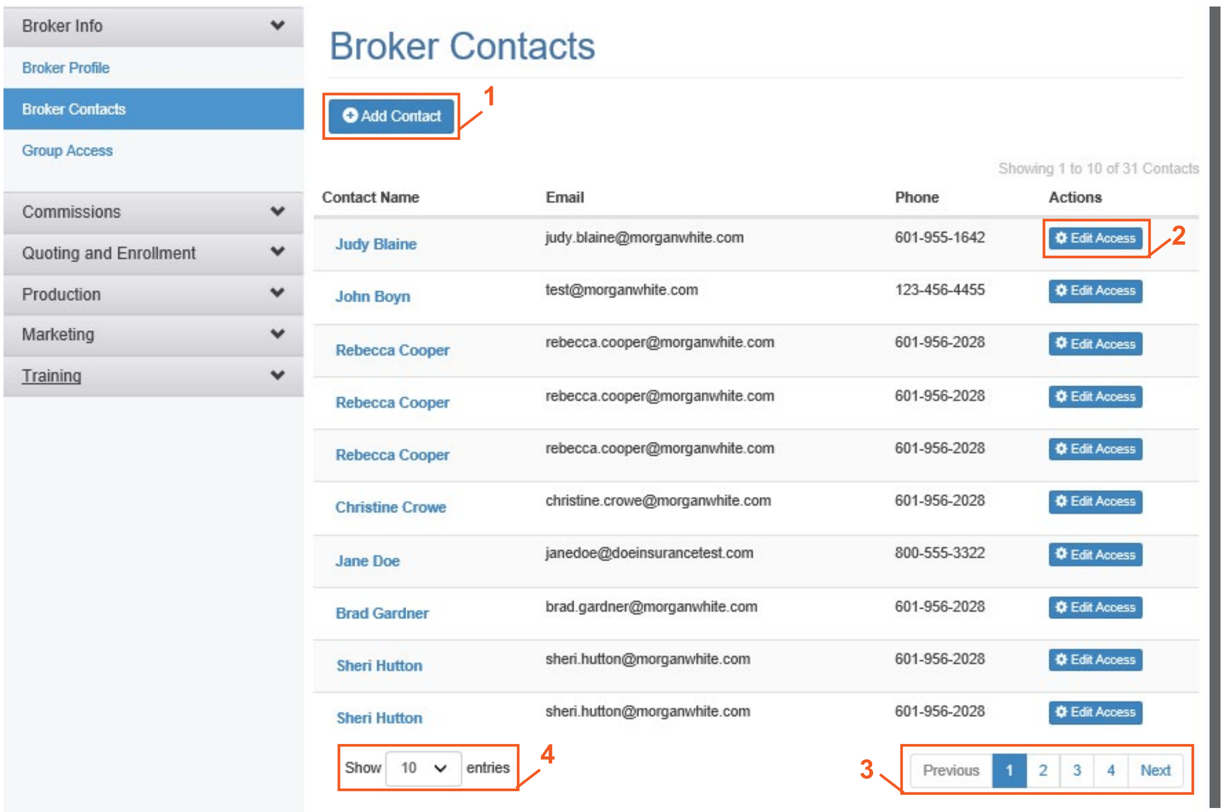


1. Toolbar
2. Agent Information
3. Company Information
4. Contact Information
5. Banking Information
6. Add a Payment Method
7. “Save” Information Button

The Broker Portal is broken down into categories:
Broker Info, Commissions, Quoting and Enrollment, Production, Marketing, and Training

If you click the “Broker Profile” link in the toolbar, there are two things you can accomplish:
1) Edit or complete broker demographics.
2) Enter or edit a payment method for commission deposits.

Broker Contacts Tab



1. Add Contact Button 2. Edit Access Button 3. Page Navigation 4. Entries Navigation

Within the “Broker Contacts” tab, brokers are able to add a contact to their account and assign them a role.

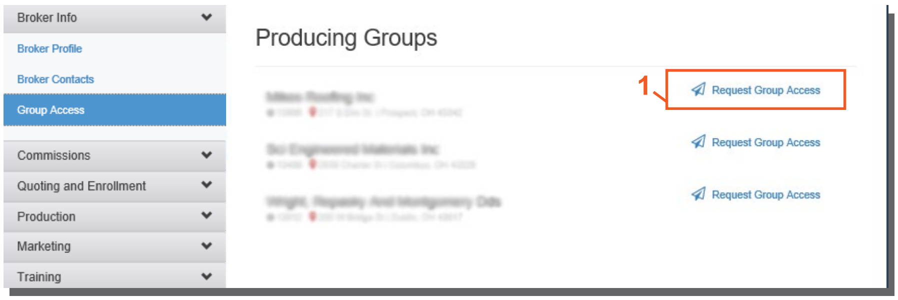
The roles are:
• **Broker Administrator** (ability to view, change, or update information)
• **Group Administrator** (ability to request access to any of the broker’s groups portals as well as generate marketing materials on the broker’s behalf)
• **Marketing Only** (allows only access to the broker’s marketing materials such as email templates or sales button images)
• **Commissions Only** (allows access to commission statements only)

You are able to add a contact to the account by clicking on the “Add Contact” button.

After providing the requested information, the contact’s data will be saved to the account. Next, assign the contact a role inside the portal by clicking the blue “Edit” tab on the right hand side of the page.

****Please Note**: This is a two-step process. Just providing the contact’s information will not give them access to information. You must assign the contact a role and send them an invitation. In turn, they would receive an email notifying them that they are now a contact with access and will be prompted to create their own username and password.

Group Access Tab



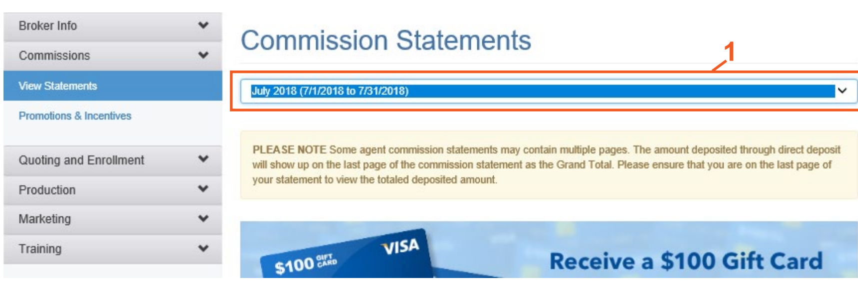
1. Request Group Access

For agents who work with groups, we have a feature in the broker portal where you can click on the words "Group Access" (In the left hand column) and if you have production under a group, they will show up in a list on this page. You can request access to that group by clicking "Request Group Access" next to their name. It will change to "Pending" until the request is either accepted or declined by the primary billing group contact on the group itself.

If declined, you will receive an email response. "Declined" will now appear next to the group's name. If the request for you to be added to enter the group portal is accepted, you will receive an email notification and "Pending" will change to an icon you can click to enter their portal.

You can use the FAQ or User Guide at the bottom of the website, once you are transferred into their portal, to learn how to navigate the group portal.

Commissions Tab



1. Commission Date Dropdown Menu

The second category on the Broker Portal is the "Commissions" tab. After contracting with MWG and having a full month of commission generated, you can go to this tab at any time and view your history of commission statements. **Please Note:** MWG does not mail commissions statements.

• Once a month ends, on the first day of the next month, the commission cycle is closed.

• Payments are reconciled, which is a manual process and can take 3-5 days to complete. Funds are then deposited by direct deposit

• Commissions are typically paid by the 10th of each month

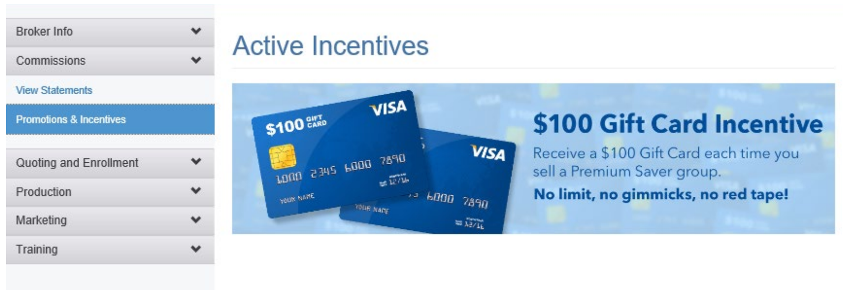
• "Grand Total" is located on the LAST page of a statement

• The number of pages on a statement is found at the top of the toolbar.

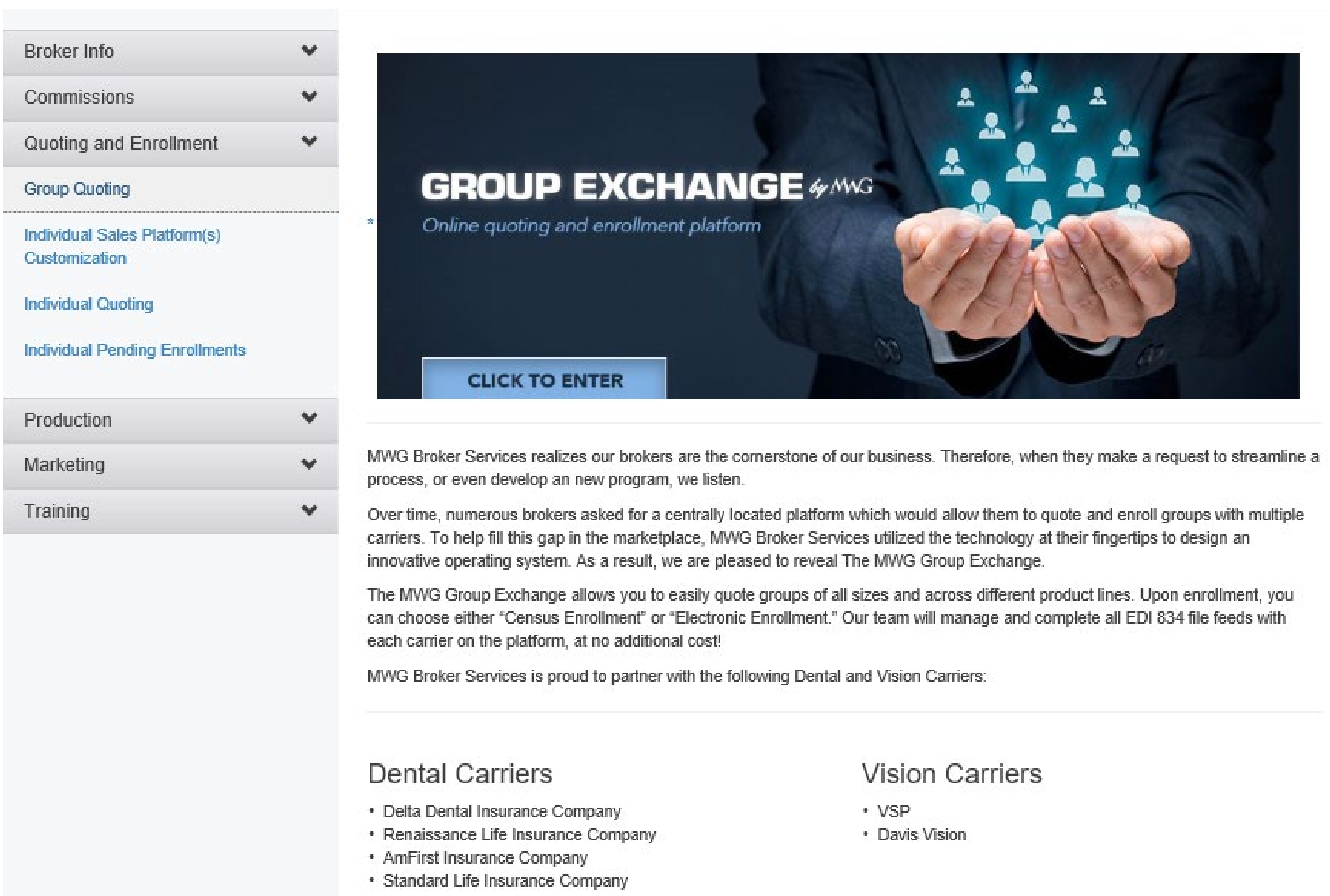
• You can print off the PDF to see all pages or you can "arrow over" to the last page

• You can export these statements in different formats. PDF is the default standard, but you can save it as an image, export in Excel, etc. The File Format Dropdown menu is where you go to change the format once the PDF is opened.

The **Promotions and Incentives** tab shows a list of incentives for brokers and the deadline for each incentive.

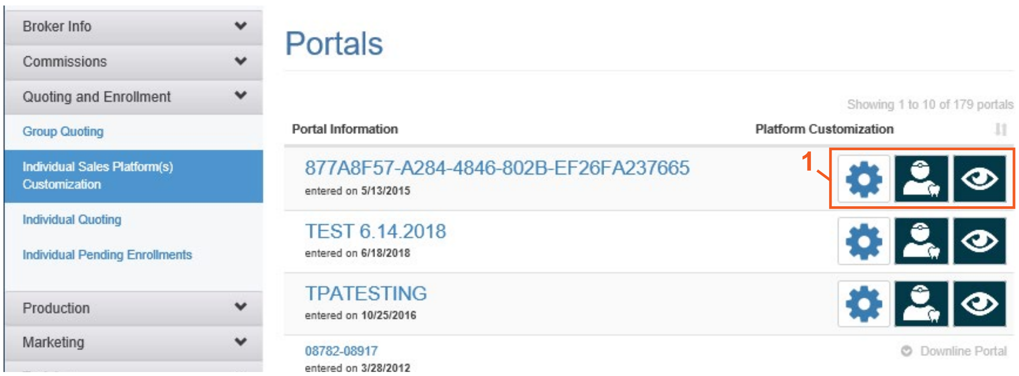


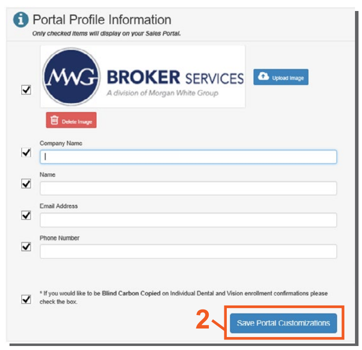
Quoting and Enrollment Tab-Group Quoting



The Broker Portal now has a Group Quoting section. The Group Quoting tab explains the Group Exchange tool offered by MWG. Clicking the image takes you to the Group Exchange site where brokers are able to start quoting.

Individual Sales Platform Customization



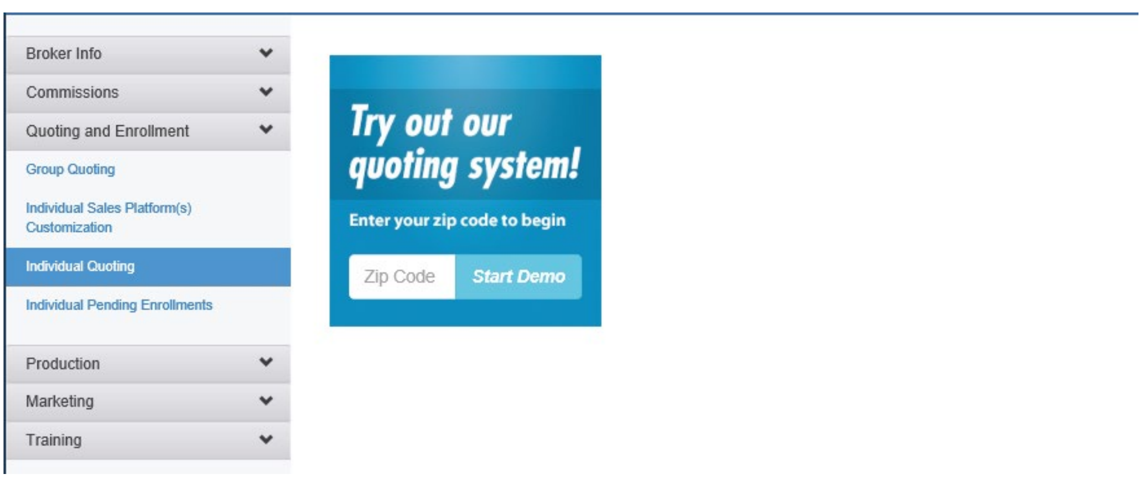


Within the “Individual Sales Platform(s) Customization” tab, brokers are able to customize their product enrollment platforms. The Dental&Vision and Vision only platforms can display company name, logo, agent name, phone number, and email. To do this, you will click on the “customization” icon to personalize your information.

1. Platform Settings
2. Save Portal Customizations

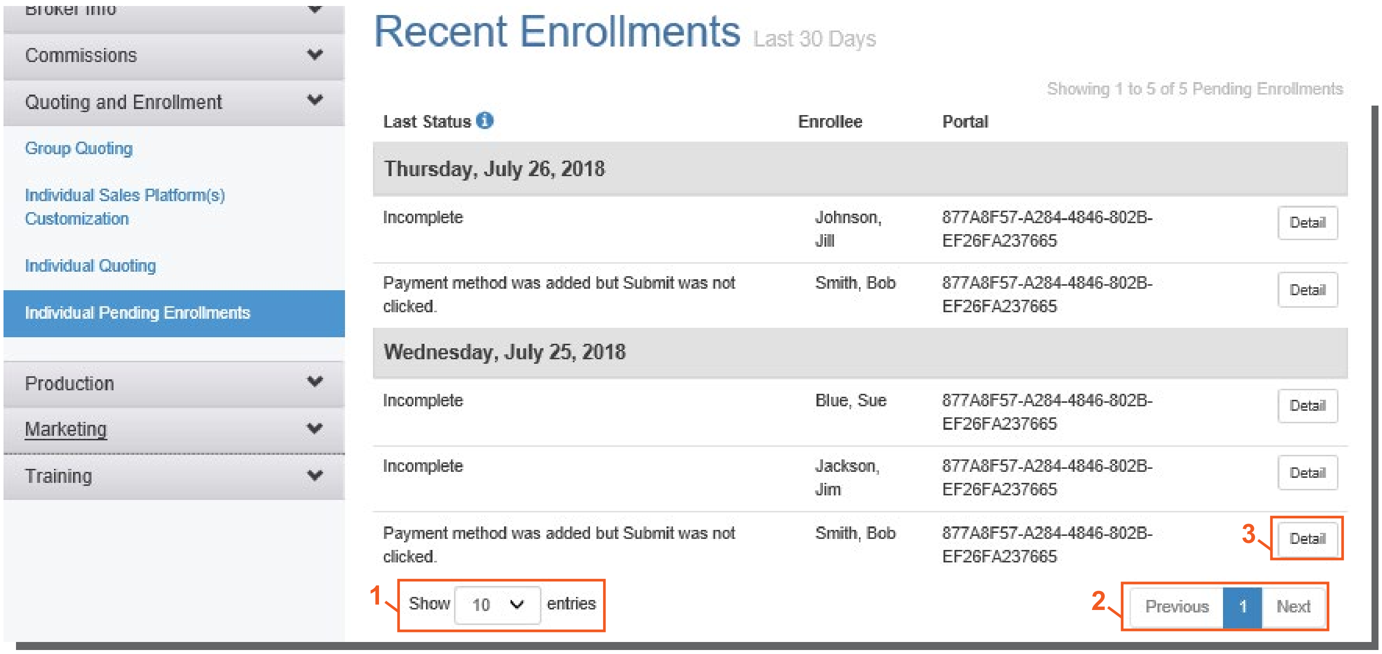
Put a checkmark next to the box you want to display on the web and click “Save”. You can then preview your site and make changes if necessary. You do not have to choose to display all fields.

Individual Quoting



The Individual Quoting tab is a demo of the Individual Dental & Vision sales platform. This allows a broker to compare and suggest plans available to a client by entering their zip code and DOB.

Individual Pending Enrollments



1. Entries Navigation 2. Page Navigation 3. Click for Enrollment Details

The “Individual Pending Enrollments” tab will display enrollments up to 30 days that have been aborted, had failed payment, or are still in the process of being submitted. The pending enrollment page will display a status next to the enrollment attempt.

Click there first to see more details on enrollments. An enrollment can take anywhere from 1 minute to a day to process, depending on if there is any information missing to completely pass the policy through.

Status Notifications:

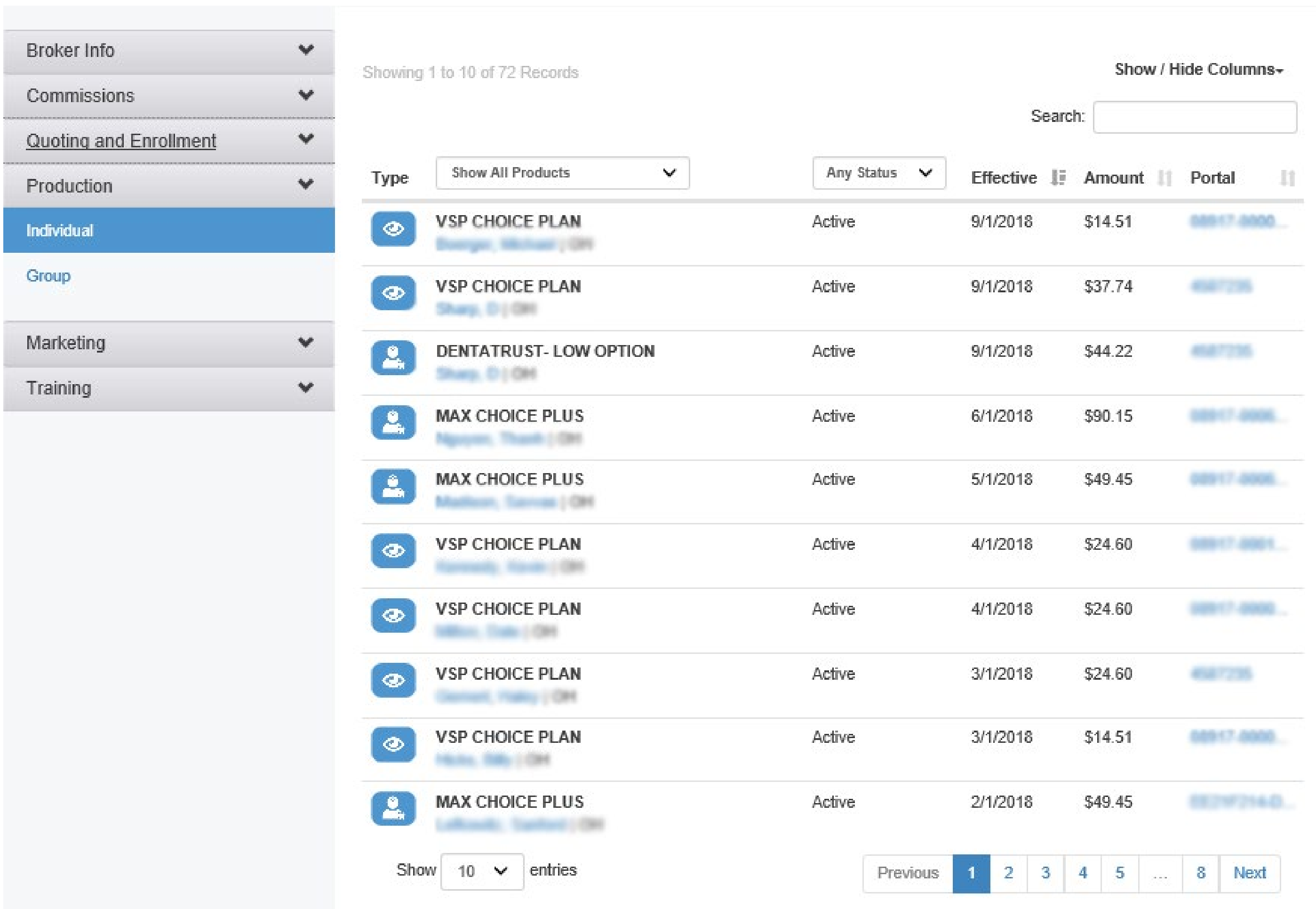
There are **4** different status notifications that can appear on each enrollment in the “Individual Pending Enrollments” tab. This status explains where the enrollment is in the enrollment process.

• **Ready**- the enrollment was successful and will process into the “Individual Pending Enrollments” tab within a few minutes/hours.
• **Incomplete**- the person has not clicked submit. Please note: This does not mean that they are done. They could have minimized their screen and may come back later to finish.
• **Payment Error**- there was something wrong with the method of payment that was entered. It could be a typo or the digits of a credit card, insufficient funds, or a bad routhing number keyed in.
• **Payment Added**-the participant added a payment method on that section of enrollment, but never clicked “Submit’. So, the enrollment didn’t process, and they didn’t get a confirmation on a sold policy.

When you click on a participant’s name, enrolled successfully, you will see a “Documents” tab available. These are copies of what the client got directly. Click to download and send to a client at anytime.

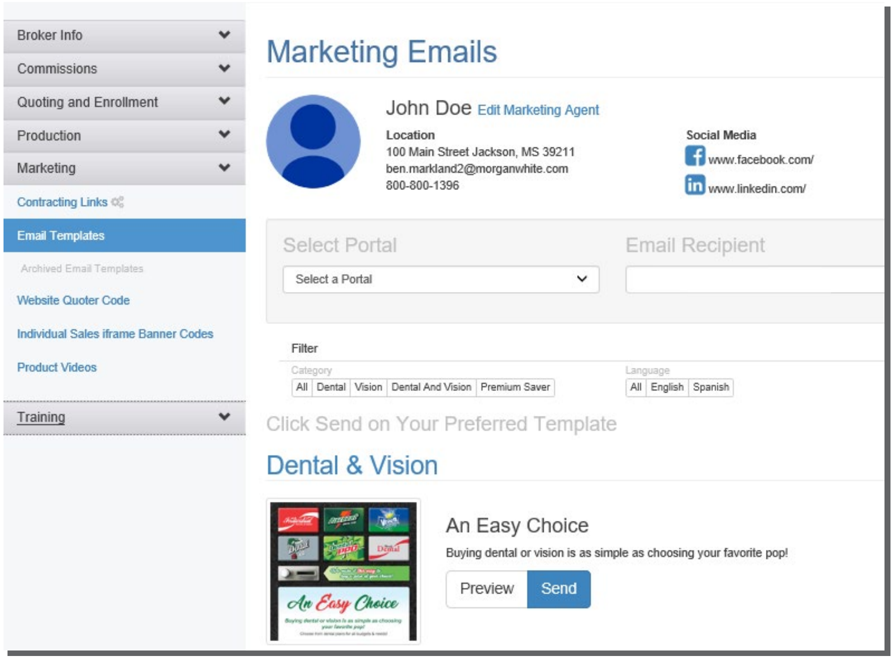
Production Tab

Real Time Enrollment Watcher- Enrollments through your sales platform can be seen in “real time” for brokers who process individual policies, group polices, or both. If you sell a policy on your platform, the successful payment enrollments process directly into one of the two titled production tabs (Individual or Group).



Marketing Tab

Another feature on the Broker Portal is the “Marketing” tab. This tab provides a broker with email templates, banner codes, and other useful tools that can be added to the broker’s site.



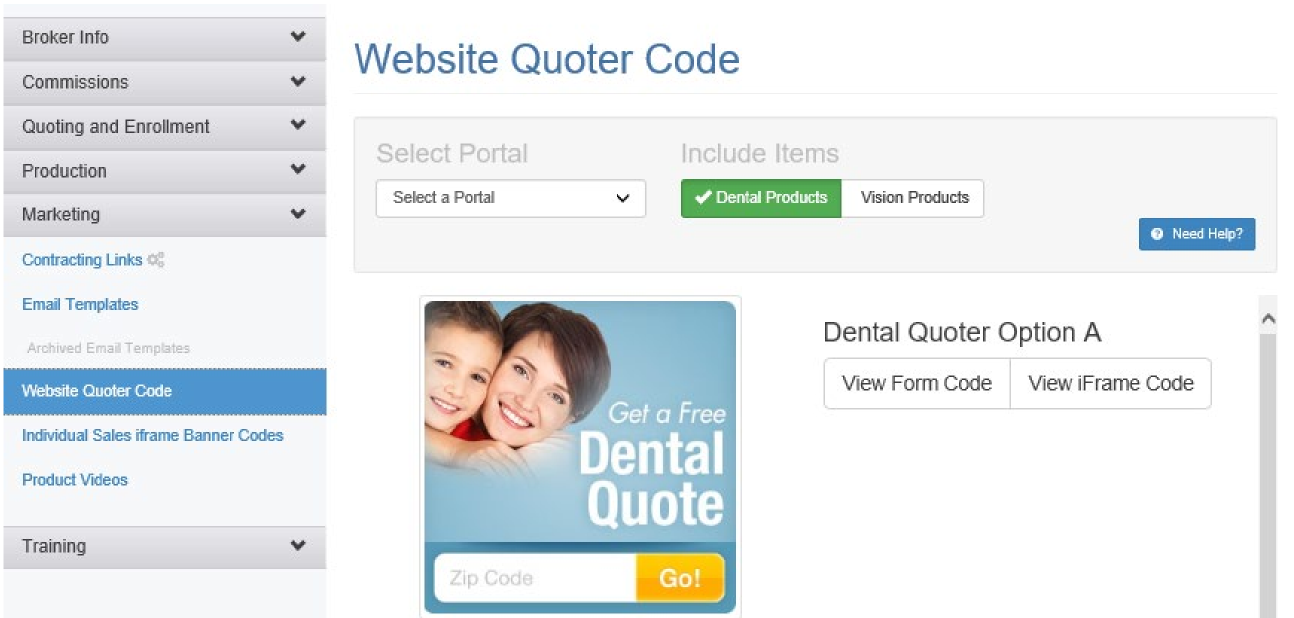
You will be able to automatically generate an email from your portal to send to your clients with your portal code built in for commission tracking.

To send a customized email, confirm your information is correct or edit it as you’d like it displayed. Select your portal (if more than one) and enter the email address of the recipient. **Please Note**: The email address needs to be your email or someone in your office, who will send out the marketing template to clients.

Next, select the template of the email you would like to send, whether vision, dental, or a combo of both.

We have included a “Preview Sample” for you to utilize prior to sending.

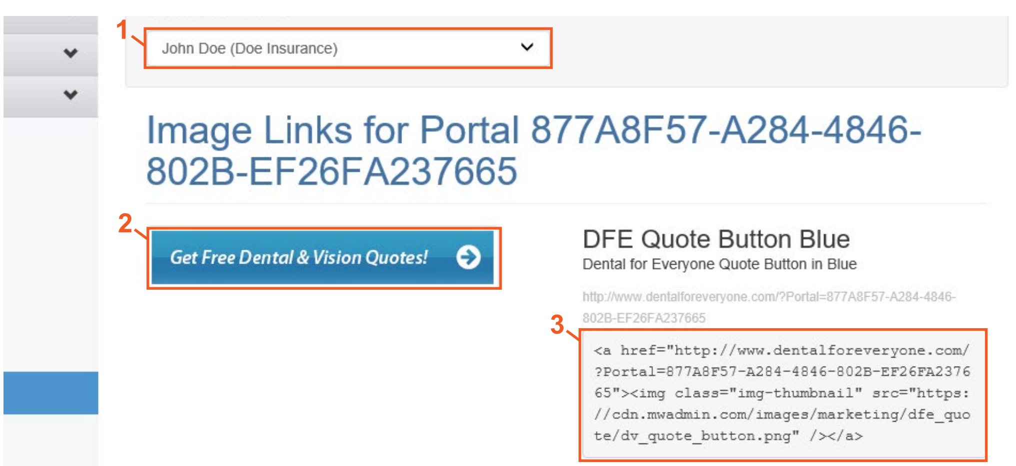
Website Quoter Code



The “Website Quoter Code” tab allows the agent the option to include a Dental & Vision or Vision only “Get a Free Quote” Image/Code on your site. Once the agent selects the portal and the image, the Form code and Iframe code are available for use.

Individual Sales iframe Banner Codes

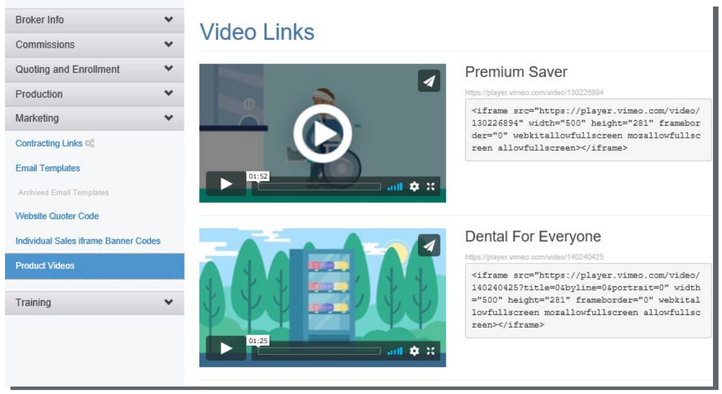
In this section the agent can use one of the Iframe banner codes to display on their website or place in email signature. These *Dental for Everyone* images and links, will direct traffic directly to your personal portal for tracking commissions/sales. Choose the graphic you want and utilize the code that is auto-generated beside the image for your personal portal.



1. Portal Select Dropdown
2. Button Preview
3. Button Code

Marketing-Product Videos

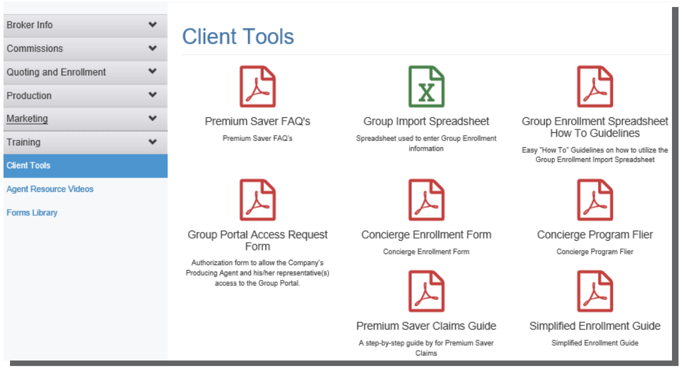
If you sell our Premium Saver plan, or Dental/Vision Individual Insurance, you can include a short video on your sales site explaining the product to potential clients. There is also the option to email these videos.



Training Tab

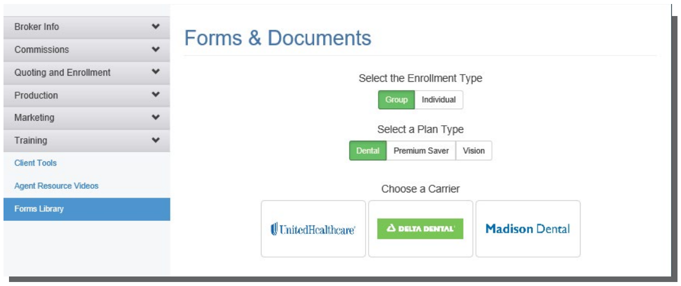
The Broker Portal provides Client Tools and short videos that can help you. The Client Tools tab holds a number of helpful documents and the Agent Resource Videos tab has videos that are provided for the agent and members of his/her staff.

Client Tools



Agent Resource Videos

Forms Library



The “Forms Library” is a tool that allows the broker to select the carrier of choice and access any documents on a product.

Contact information is displayed at the bottom of all tabs for your convenience on the Broker Portal. This serves as a quick reference if you need to contact one of our departments.

We appreciate your feedback. If you have any questions, please contact Broker Services at 877-759-5728