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1.1 Dashboard



When you log into the Portal, you are directed straight to your dashboard

Click on your name in the top right to Logout



New Enrollments

Graphical representation of new enrollments over the past 12 months



Quick Links Important or helpful URL links to access quickly

Quick	Links
More Links	
Link	Description
Miramar Agent	Miramar Agent
Plan Documents and Enrollments	Plan Documents and Enrollments
Broker FAQ	Broker FAQ



Ready to Sell

See what Licenses, DOI, and Training are valid or need attention

Credentials	Number of Expired	Status
License	1	Attantion
Training		Alt Valid
DOI		All Valid
View Det	ile Developed	Dataila

Birthdays

View Member Birthdays occurring month to month



Medicare Book of Business

Graphical representation of Medicare book of business within the last 12 months





Commercial Book of Business

Graphical representation of Commercial book of business within the last 12 months



Commissions

Graphical representation of Broker's earned commissions within the last 12 months





1.2 Statements

On the Navigation menu:

	Stateme	ents							٠		INSURANCE AGEN	VCY 🔔
NAVIGATION												
🙆 DASHBOARD	11	Statement Number	Statement TI Date TI	Payee 斗	Transactions $_{\uparrow\downarrow}$	Credits $_{\uparrow\downarrow}$	Debits †1	Balance $_{\uparrow\downarrow}$	$Amount_{T\downarrow}$	Check Date ^{⊺⊥}	Amount Paid	T.L
STATEMENTS	View	3201	01/01/2021	INSURANCE AGENCY	22,620	\$60,037.00	\$0.00	\$0.00	\$60,037.00		0.00	
BOOK OF BUSINESS >	View	3225	03/01/2021	INSURANCE AGENCY	204	\$702.00	\$0.00	\$0.00	\$702.00		0.00	
SEARCH AGENTS	Showing	1 to 2 of 2 en <mark>t</mark> ries		LLC								
									FIRST	PREVIOUS	NEXT LA	ST
MY ACCOUNT												

Agencies can view their past commission statement. If they click VIEW:

PDF Detail	05/01/2021	20	5	\$1 301 00	\$0.00	50.00	\$1 301 00
1 Dr Dean	000000000	20		01,001,00	00.00	00.00	01,001.00
Rep ID	Rep Name	Member ID	Member Na	me	ffective Date	Term Date	Amount
12345	Agent A Agent	Mem12345ID	Member 1	01	1/01/2021	04/30/2021	\$90.00
12345	Agent A Agent	Mem12345ID	Member 1	05	5/01/2021		\$224.00
12345	Agent A Agent	Mem12346ID	Member 1	05	5/01/2021		\$224.00
12345	Agent A Agent	Mem12347ID	Member 1	ember 1 05/01			\$539.00
12345	Agent A Agent	Mem12349ID	Member 1	05	5/01/2021		\$224.00



1.3 Book of Business

Agencies can view their book of business and search members. They can view member names, MBI numbers, Start and End dates and enrolled plans.

Search Members: is used to organize enrolled members for Medicare BoB

Search Policy: is used to organize enrolled members for Commercial BoB

DASHBOARD									
DASHBOARD	Effective From		Effective To		Rep NPN			Rep Name	
STATEMENTS	Active Member D Inactive Mem	ber 🖸			SEARCH DOWNLOAD				
BOOK OF BUSINESS 🗸 🗸	Member ID 11	First Name 11	Last Name	14 MBI Number 1	1 Start Date 11	End Date †1	Plan †1	Rep ID 11	Rep Name
	(promotion)	HUBBAIT	10132165		instructions.		Holiza Par	1010	R0364.2 0200
Search Members	01000	access	1003		00012002		Holory Par	11148	ALCON CODED/TY
Search Policies	01/010	10.071	55,8752		0.0013-00103		Holes in Pari	1014	LC RESERVED AGAINST
	010003	216	101000		0900,0003		Robert Par	1000	1000 0442
	0.000	1000	894,77		1010.000	101002003	Holizza Part	1000	Automotic providence
ONBOARDING	01000	2423	(1000)		1010.0005		Weblan Par	1048	A1276-229-8371
	01/1001	RENDECT.	1480755		10010-0003		Holizzy Pari	100.0	NUMPLE 4000
	(24.0101)	0000004	1000		4249,2003		Holizan Par	1004	LC RETURNED AND ADDRESS
	010000	10.005	10.000		0.000.0000		Holizer Par	1000	100.040
		100,000	1.17		1000		Madages Page	1000	R0204-1-0203

1.4 Search Agents

Here agencies can view all their down lined Agents and Agencies and see their:

- First and Last Name
- Start and End Dates
- Agent IDs
- Policy IDs

	т	First Name		Last Name	Policy ID		Group ID		Agent ID	
NAVIGATION		Effective From		Effective To						
DASHBOARD										
555 STATEMENTS		Policy ID 11	First Name	11 Last Name	11 Product 11	Start Date	End Date 11	Group 11	Agent ID 11	Agent Name
BOOK OF BUSINESS	>	200137580-04	Grant	Lew	NV IND	12/01/2021	12/31/2021		14068159	Jeremy Shugarman
		200137580-01	Kevin	Lew	NV IND	12/01/2021	12/31/2021	9	14068159	Jeremy Shugarman
SEARCH AGENTS		200137580-02	Robyn	Lew	NV IND	12/01/2021	12/31/2021		14068159	Jeremy Shugarman
ONBOARDING		200137580-03	Trent	Lew	NV IND	12/01/2021	12/31/2021		14068159	Jeremy Shugarman
		200124342-01	Marie	Fishelberg	NV IND	11/01/2021	12/31/2021		14068159	leremy Shugarman
MY ACCOUNT	>	200124342-02	Robert	Fishelberg	NV IND	11/01/2021	12/31/2021		14058159	Jeremy Shugarman
		200058727-02	Alyssa	Gray	NV IND	11/01/2021	12/31/2021		14068159	Jeromy Shugarman
		200123550-02	Cathy	Huriburt	NV IND	11/01/2021	12/31/2021	8	14068159	Jeremy Shugarman
		200123550-01	Keith	Hurlburt	NV IND	11/01/2021	12/31/2021		14068159	Jeremy Shugarman
		200124364-01	Joanna	Obara-Ramirez	NV IND	11/01/2021	12/31/2021		14068159	Jeremy Shugarman
		Showing 1 to 10 of 250 entries					FR	ST PREVIOUS	2345	



1.5 **Onboarding**

Here Agencies can view the status of all their onboarded cases and create new cases via a bulk upload file or create cases individually.

	Onboarding
MANGATION	ONBATE CASE INBERT FILE FOR ACCHTS SEE SAMPLE ACONT FILE DOWNLDAD
	Name 12 LOB 12 Year 11 Type 12 NPN 12 States 12 Upline Level 12 Affliated Agency/Feam 12 Status 11 Submitted By 12 Creation Date 12
🖆 SEARCH ADUNTS	Showing 0 to 0 of 0 ontries.

1.6 My Account

Under **Account Info** you can:

View your account information and update your:

- First and Last Name
- Email
- Address
- Phone Number

	EDIT ACCOUNT INFO				
	Personal Information				
COF BUSINESS >	First Name		Last Name		
	Email				
unt Infe	Primary Phone		Mobile Phone		
	Address Information				
	Address				
	City	State		Zip	
		C0.		96001	



Under Payee Info you can:

- 1) Update your banking Information and banking type
- 2) Change payee name and address

	ayee mito						5 I I
	EDIT PAYEE INPO						
	Namo			Address			
ess >							
	City	State		Zip		SSN / TIN	
2		-	-			•••••	
	Show / Hide Information						
	Banking Method						
	ACH	-					
	Account Number		Verify Account Number		Routing Number	r	
	Financial Institution			Account Type			
				CHECKING			
	Vorded Check Unitoad *						