Contents

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

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

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
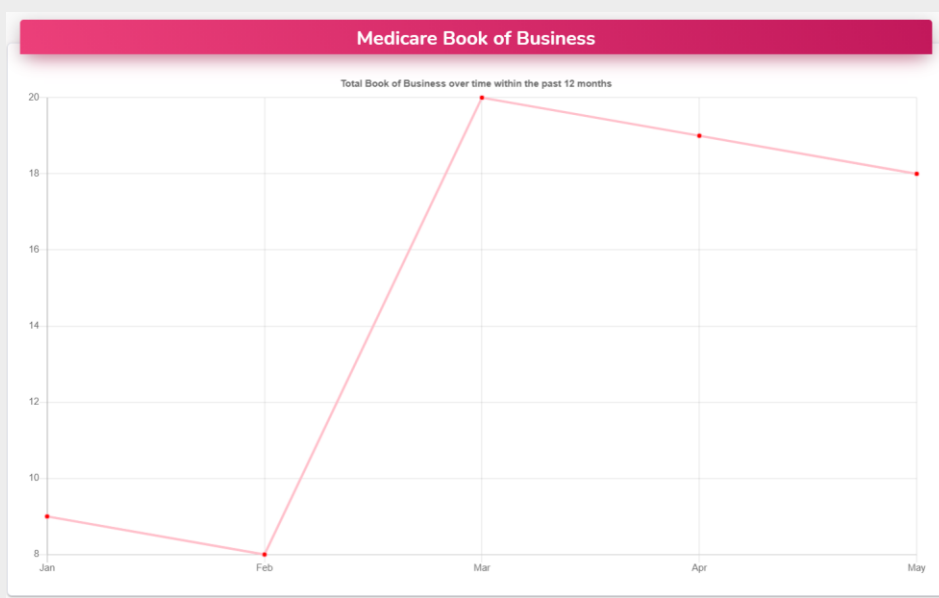

Commissions

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

1.2 **Statements**

On the Navigation menu:

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

1.3 **Book of Business**

Agents 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

1.4 **Onboarding**

Here agents can view the status of their prior onboarding cases and continue past cases.

Brokers will also use this menu item in the second half of the calendar year for the recertification process.

1.5 **My Account**

Under **Account Info** you can:

View your account information and update your:

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

Under **Payee Info** you can:

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