

FAQ BrokerOffice

1. How do I clear my browser's cache and cookies?

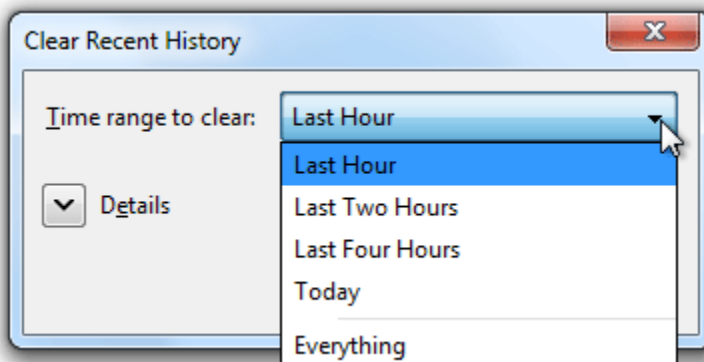
As you browse the internet, websites and web applications may use browser cookies and the browser cache to store information in order to improve your experience. Clearing browser data is a basic troubleshooting step that could potentially resolve issues with Marketplace. Click the browser name below to visit your browser's manual page for a step-by-step guide on clearing cache and cookies.

Chrome:

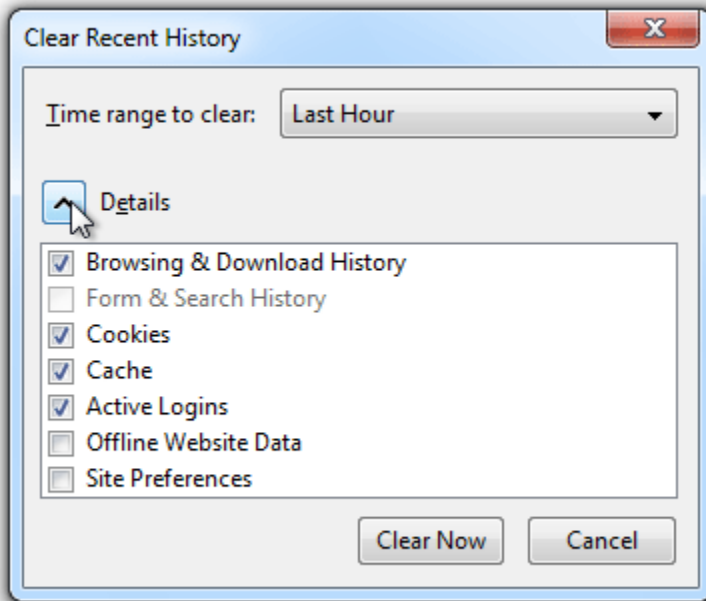
1. In the top-right corner of Chrome, click the Chrome menu ☰.
2. Select **More tools > Clear browsing data**.
3. In the dialog that appears, select the checkboxes for the types of information that you want to remove.
4. Use the menu at the top to select the amount of data that you want to delete. Select **beginning of time** to delete everything.
5. Click **Clear browsing data**.

Firefox:

1. Click the menu button ☰, choose History, and then Clear Recent History....
2. Select how much history you want to clear:
 - o Click the drop-down menu next to **Time range to clear** to choose how much of your history Firefox will clear.



- o Next, click the arrow next to **Details** to select exactly what information will get cleared. Your choices are described in the [What things are included in my history?](#) section above.

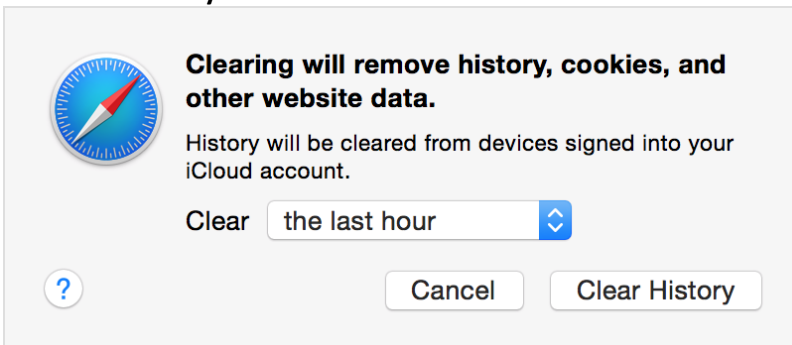


3. Finally, click the Clear Now button. The window will close and the items you've selected will be cleared.

Safari:

In OS X Yosemite, you can delete website data for the past hour, or past few days if websites or pages stopped loading recently.

1. Choose **History > Clear History** and **Website Data**.
2. In the sheet that appears, choose the range of data you want to remove from the clear pop-up menu.
3. Click **Clear History**.



If you want to remove website data for all of the sites and pages you've ever visited, choose **"all history"** from the clear pop-up menu. The option to Remove All Website Data in the Privacy pane of Safari preferences does this too. These options also reset your browsing history and Top Sites.

2. How do I change my contact information in Broker Office?

1. Log in to your BrokerOffice account by going to <http://www.brokeroffice.com>
2. Enter your username and password.
3. Click the **Home** tab.
4. Click the **Edit Account Info** link on the orange bar at the top of your screen.
5. Modify the appropriate fields.
6. Click the **Submit Request** button to save and enable your changes.

3. How do I import leads into Broker Office?

1. Log in to your BrokerOffice account at <http://www.brokeroffice.com>
2. Click on the **Leads** tab.
3. In the orange bar, click on "**Import Leads**."
4. Click on the **Browse** button to locate and select the file you would like to import.

Note: Please save your list of leads as a CSV (Comma Separated Value) file for best results.

5. Type the character that is used to separate each field in your import file (This is normally a comma) into the "**Separator**" field. If you are not sure what this is, then do not edit this field.
6. Enter the character used to enclose fields (This is normally the double-quotes character – "") into the "**Enclosing Character**" field. If you are not sure what this is, then do not edit this field.
7. Choose the appropriate lead type in the **Config ID** dropdown menu and click **Continue** to go to the next screen.
8. You will be presented with a list of all available import fields. Drop down the box for each field to match it with the correct field name in your CSV file. When completing this screen, please take note of the following points:
 - Some fields in these options might be fields that you do not need or fields that are used by some users or systems only. If there are certain fields that you do not want to import, simply leave those fields blank.
 - Field names beginning with "insured_" are used for the applicant (insured_1), with the exception of first name (first_name) and last name (last_name). The spouse (insured_2) and dependents (insured_3 onwards) use the "insured_" field names only.
 - Field names beginning with "address_" are used for the address (address_1 is used for the primary address and address_2 is used for the secondary address)
9. Once you have finished mapping your import fields, click the "Import" button at the bottom of the page.
10. When the import is complete your leads will then show in the Leads tab of BrokerOffice!

➤ How do I export leads from the BrokerOffice database?

Leads can be exported from Broker Office using the Bulk Operation function. You can reach this through your Advanced Search:

1. Log in to your BrokerOffice account at <http://www.brokeroffice.com>.

2. Select the "**Reports**" tab and click "**Search Leads**"
3. You will be presented with our search form. Enter criteria to search for the leads that you want to export.
4. To export all leads within a certain timeframe, simply select the date range using the "**Created Between**" fields and leave all other fields blank.
5. Once you have entered your search criteria click "**Search**"
6. You will see your search results displayed in increments of 20 leads per page. These are the leads that you will be able to export based on your search criteria.
7. In the "**Search Results**" section, answer the question "What would you like to do next?" by selecting "**Export Leads**" from the drop down menu. When ready, click "**Perform Bulk Operation**" to complete the export.
8. Leads will be exported as a CSV file and saved to the folder designated by your web browser for downloads. Many different types of software can make use of this type of file. It is also possible to open this file directly with Microsoft Excel or another compatible spreadsheet application to view your exported leads.

Note: If you selected a large number of leads, it may take a few moments to prepare the file. Do not click more than once.

4. How do I change the status of my leads?

Setting and changing the status field of your leads is one of the easiest ways to track where any particular lead is in your sales process. You can update the status on one lead at a time, or you can use Advanced Search to update the status on an entire group of leads.

Setting/Changing the Status field for a single lead

1. From BrokerOffice, select the **Leads** tab and then navigate to the **View Leads** page.
2. In the "**Status**" column, select the field for the lead you would like to change. Using the dropdown menu that appears, select the status for the lead.
3. The change will automatically be saved as soon as you click out of that field, so there is no need to save the lead.

Setting/Changing the Status field for a group of leads

To change the status of an entire group of leads you will need to search for the leads that you want to change using Advanced Search:

1. Click the "**Reports**" tab
2. Choose "**Search Leads**"
3. Enter criteria to search for the leads that you need to change the status of
4. Click "**Search Now**" to find the leads
5. Using the check boxes to the left of the leads, select the leads whose status you want to change.

Note: If you want to update all of the leads in your search results check the box in the top row next to the column headers.



6. At the top of the Advanced Search Results page, select "**Change Lead Status**" from the drop down menu, followed by **Perform Bulk Operation**.
7. Using the **Desired Status** dropdown menu select the status that you want the leads to be changed to.
8. Click "**Change Status**" and all of the leads you selected will be changed to the new status.

Note: You are only able to change the status of 150 leads at a time, if you need to update the status on more than 150 leads, please submit a support case.

FAQ Marketplace

1. What are the health plan categories?

All health plans are now grouped into four different "categories" including: Bronze, Silver, Gold and Platinum. This was implemented to make it easier to understand how a health insurance plan divides the costs of medical care between the insurer and the policyholder. Each category has a different level of cost sharing -- the plan will pay for a certain percentage of costs including deductible, coinsurance and copayments. The chart below describes how each category shares these costs of medical care:

| Health Plan Category | Bronze | Silver | Gold | Platinum |
|---|--------|--------|------|----------|
| What the insurer pays for health costs | 60% | 70% | 80% | 90% |
| What policyholder pays for health costs | 40% | 30% | 20% | 10% |

Generally speaking, monthly premiums will go up as the insurer pays more of your health costs.

2. What is coinsurance?

Coinsurance is the percentage of a medical bill that the policyholder will be responsible for when receiving medical care. A common coinsurance rate is 80/20, where the policyholder pays 20% of a medical bill and the insurance plan pays for 80%.

Coinsurance is slightly different than copayments. They both are a part of a medical bill the policyholder will be responsible for, but a copayment is a dollar amount — such as \$20 for a doctor's visit — rather than a percentage.

3. What if the applicant has a pre existing condition?

For health plans starting on or after January 1, 2014, applicants can no longer be turned away for coverage due to a pre existing condition. Also, policyholders will not be charged more for any pre-existing conditions.

However, policyholders can be charged more based upon the total number and age of covered household members, the state the applicant lives in, and tobacco usage.

4. In the Marketplace, can plans be filtered?

Yes. The agent or consumer has the capability to filter the plans using the filters in the “Shop by” menu on the left side of the screen. Plans can be filtered by the following: Carrier, Deductible, Copayment, Max Out-Of-Pocket, Plan Type, Plan Categories, Monthly Premium, Tax Credit Eligible, Pediatric Dental, and HSA Eligible.

5. Is there a way to sort my plans?

Yes. The agent or consumer can use the “SORT PLANS BY” dropdown menu that appears just above the first available plan to sort plans. The available sort options available:

- Premium
- Plan Category
- Maximum Out of Pocket
- Copayment
- Deductible
- Plan Type


6. Once the shopping experience has started, how can I edit information for the applicant, applicant's spouse, or applicant's dependents?

Applicant, spouse, or dependent information can be edited or added by selecting the **"Edit"** button that appears in the white box next to the text saying "Quote results for **X applicant** in **XX**" above the available plans. Click on the link here to edit the information.

Showing **55** of **95** plans starting at **\$174.05 a month** .
Quote results for **1 applicant** in **IL**. ([Edit](#))
Estimated monthly cost savings of **\$93.00** applied. ([Edit](#))

To get started, please tell us a bit about yourself...

You

 We need some basic information to show available plans in your area.

Zip Code

60490

Date of Birth (MM/DD/YYYY)

05

/ 16

/ 1974

Gender


Male

Female

Have you used tobacco products 4 or more times per week in the past 6 months?

Yes No

Anybody else?

 If you want to include others on your insurance, add them here.

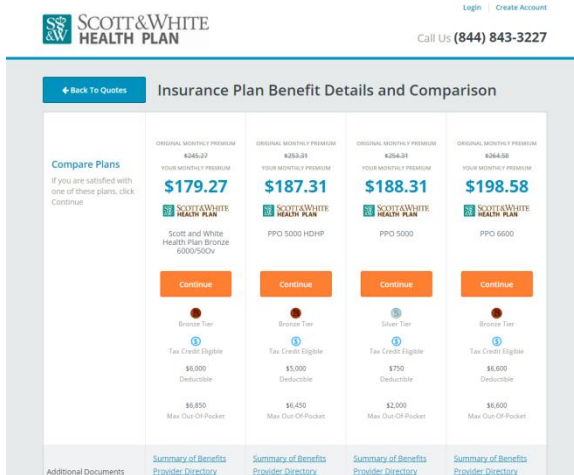
Add Spouse >

Add Dependent >

Continue

7. How many plans can I compare at one time?

You can compare up to 4 plans at one time.



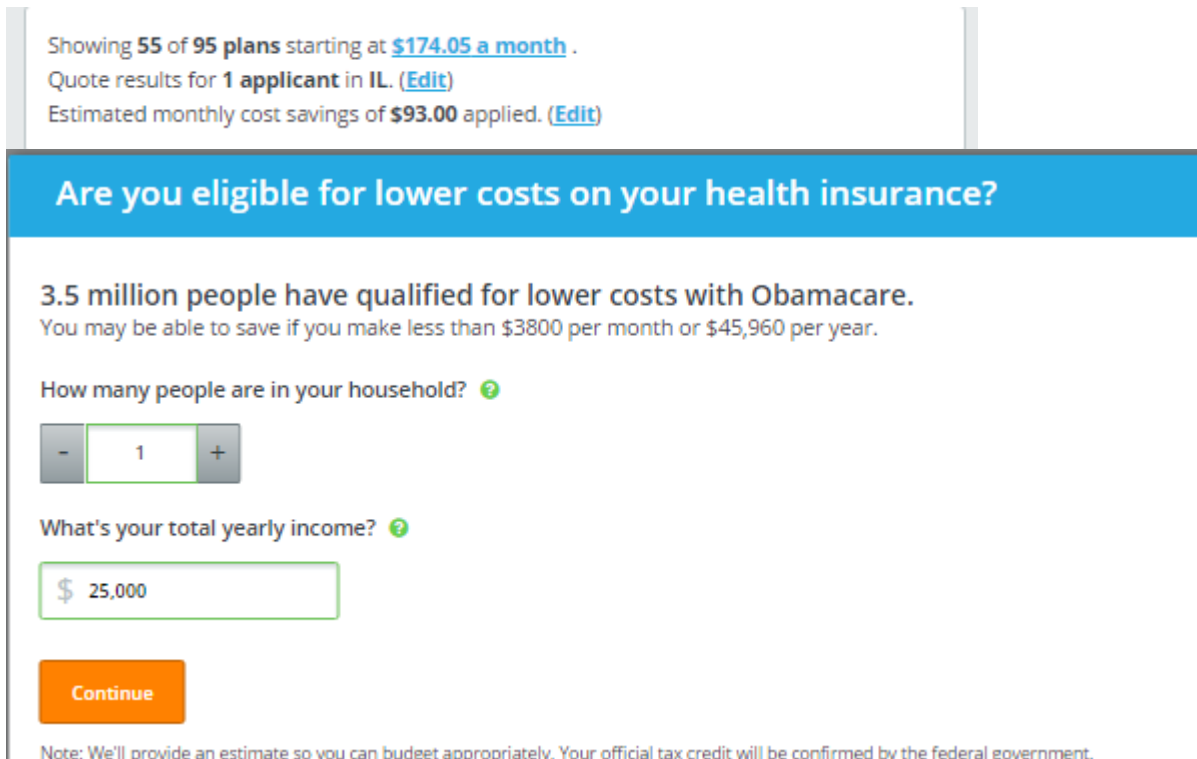
Scott & White HEALTH PLAN | Login | Create Account | Call Us (844) 843-3227

Insurance Plan Benefit Details and Comparison

| Compare Plans | ORIGINAL MONTHLY PREMIUM \$245.27 | ORIGINAL MONTHLY PREMIUM \$253.31 | ORIGINAL MONTHLY PREMIUM \$254.31 | ORIGINAL MONTHLY PREMIUM \$264.58 |
|---|--|---|---|-----------------------------------|
| YOUR MONTHLY PREMIUM \$179.27 | YOUR MONTHLY PREMIUM \$187.31 | YOUR MONTHLY PREMIUM \$188.31 | YOUR MONTHLY PREMIUM \$198.58 | |
| SCOTT & WHITE HEALTH PLAN Scott and White Health Plan Bronze 6000/500v | SCOTT & WHITE HEALTH PLAN PPO 5000 HDHP | SCOTT & WHITE HEALTH PLAN PPO 5000 | SCOTT & WHITE HEALTH PLAN PPO 6600 | |
| Continue | Continue | Continue | Continue | |
| Bronze Tier | Bronze Tier | Silver Tier | Bronze Tier | |
| Tax Credit Eligible | Tax Credit Eligible | Tax Credit Eligible | Tax Credit Eligible | |
| \$5,000 Deductible | \$5,000 Deductible | \$750 Deductible | \$6,000 Deductible | |
| \$6,850 Max Out-Of-Pocket | \$6,400 Max Out-Of-Pocket | \$2,000 Max Out-Of-Pocket | \$6,600 Max Out-Of-Pocket | |
| Additional Documents | Summary of Benefits Provider Directory | Summary of Benefits Provider Directory | Summary of Benefits Provider Directory | |

8. Once the shopping experience has started, how can I change the household size and income?

The household size and income information can be edited by selecting the “Edit” button that appears in the white box next to the text regarding the estimated monthly cost savings above the available plans. Click on the link here to edit the information.



Showing 55 of 95 plans starting at [\\$174.05 a month](#) .
Quote results for 1 applicant in IL. [\(Edit\)](#)
Estimated monthly cost savings of **\$93.00** applied. [\(Edit\)](#)

Are you eligible for lower costs on your health insurance?

3.5 million people have qualified for lower costs with Obamacare.
You may be able to save if you make less than \$3800 per month or \$45,960 per year.

How many people are in your household? [?](#)

- 1 +

What's your total yearly income? [?](#)

\$ 25,000

[Continue](#)

Note: We'll provide an estimate so you can budget appropriately. Your official tax credit will be confirmed by the federal government.



9. How do I know if a plan is eligible for a tax subsidy?

Subsidy eligible will be labeled with this icon on the shopping screen:



Plans can also be filtered by subsidy eligibility using the “**Shop by**” menu on the left side of the screen.

10. Where can I find specific details of the plan such as coverage for hearing aids or specialist visits?

Each plan has a section that says “**Plan Details**” with a “**View**” link where you can access more detailed information regarding coverage, deductibles, and other details. You can also download a copy of the plan’s brochure from this link.

Once a plan is selected, you can also view the details of the plan by clicking on the “**View Full Details**” link that will appear below the plan’s name.

11. If an applicant is not interested in seeing if they qualify for a subsidy or if they are uncomfortable with sharing their household income, what should be entered in the fields asking for income?

The household income questions cannot be bypassed, so the agent can enter a really high value as the income if the applicant would prefer not to disclose.

12. Will the Marketplace account for the Cost Sharing Reduction for silver plans?

Yes, the Marketplace will dynamically recalculate the plan benefits of silver plans if the applicant’s demographic information meet the eligibility requirements.

13. Is there a link to the plan brochure on the compare page?

Yes. The plan brochure is available in the plans comparison page and the plan summary page.

14. If you generate an application with an applicant’s email and then generate another application with the same email, is that a problem?

Applicant email needs to be unique for each application.

15. Can an application be submitted without a Social Security Number?

A valid Social Security Number is required for off-exchange applications. For on-exchange applications, a valid Social Security Number, Individual Taxpayer Identification Number, or Adoption Taxpayer Identification number is required.

16. Will the applicant encounter any issues with the shopping platform if they received subsidized health insurance during the previous year?



No. The applicant's will need to reapply for subsidized health insurance and there should be no difference in the shopping flow in such cases.

17. Once I submit an application and return to the Enrollment Summary screen, a "Start First Application" button appears at the bottom of the screen. What is that for?

This button will not be active and does not need to be selected after a successful submission. We will work to remove this button in future deployments.

18. If an applicant's demographic information is changed in the Marketplace, will it be updated in BrokerOffice?

No. Demographic changes that are made to the applicant's profile in the shopping process will not be updated in BrokerOffice.

19. Which fields will be passed over when I launch the Marketplace from BrokerOffice?

The following fields for the primary applicant will be passed over from SMA and will be pre-populated in the applicant's demographic and application information:

- First Name
- Last Name
- Email Address
- Phone Number
- Date of Birth
- Zip Code