



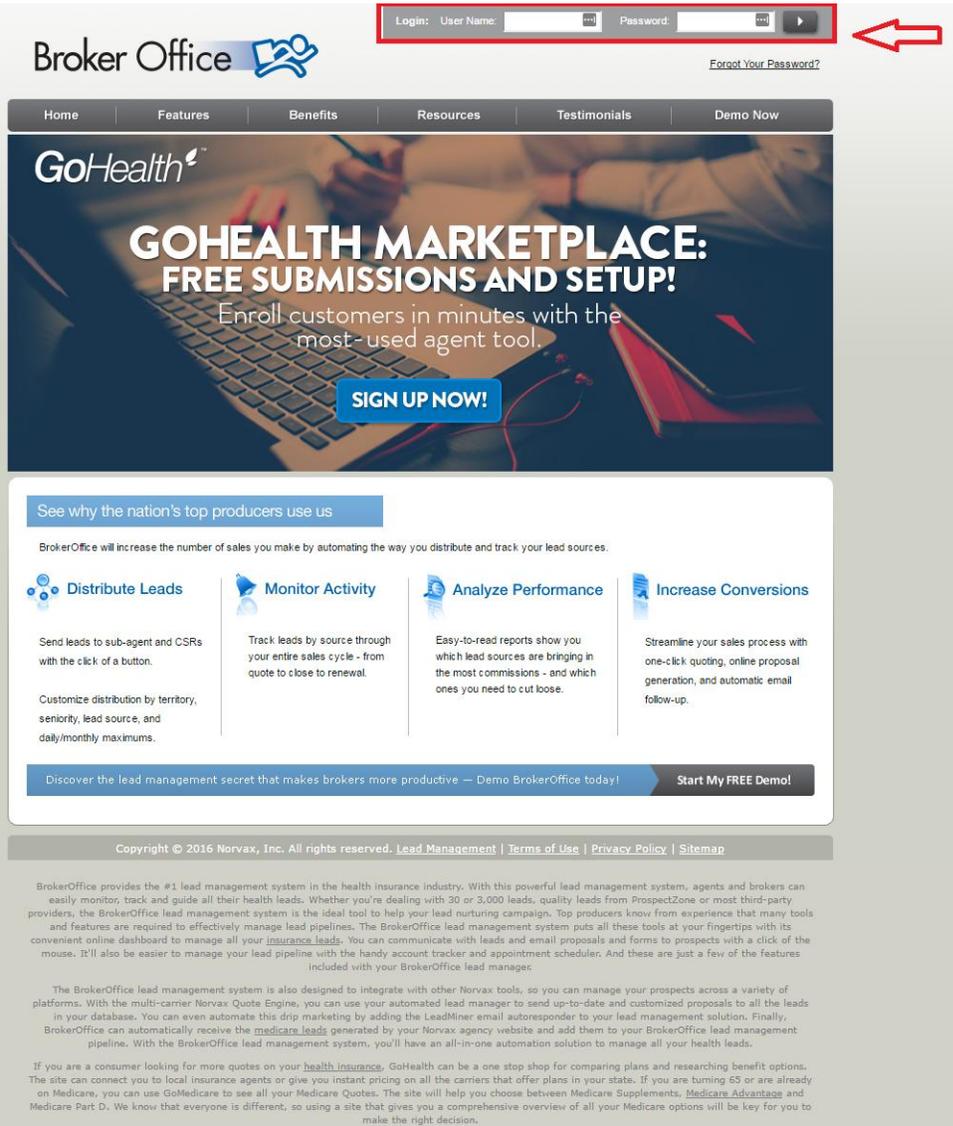
Quick Guide for Scott & White

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Logging Into BrokerOffice:

- Click on link from Welcome Email, or visit www.BrokerOffice.com
- Login to BrokerOffice using “User Name” and “Password” (usually your email address)
- If forgot password, click forgot password to reset
- Click the play button



Broker Office  [Forgot Your Password?](#)

Home Features Benefits Resources Testimonials Demo Now

GoHealth
GOHEALTH MARKETPLACE:
FREE SUBMISSIONS AND SETUP!
Enroll customers in minutes with the most-used agent tool.
SIGN UP NOW!

See why the nation's top producers use us

BrokerOffice will increase the number of sales you make by automating the way you distribute and track your lead sources.

 Distribute Leads Send leads to sub-agent and CSRs with the click of a button. Customize distribution by territory, seniority, lead source, and daily/monthly maximums.	 Monitor Activity Track leads by source through your entire sales cycle - from quote to close to renewal.	 Analyze Performance Easy-to-read reports show you which lead sources are bringing in the most commissions - and which ones you need to cut loose.	 Increase Conversions Streamline your sales process with one-click quoting, online proposal generation, and automatic email follow-up.
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Discover the lead management secret that makes brokers more productive — Demo BrokerOffice today! **Start My FREE Demo!**

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BrokerOffice provides the #1 lead management system in the health insurance industry. With this powerful lead management system, agents and brokers can easily monitor, track and guide all their health leads. Whether you're dealing with 30 or 3,000 leads, quality leads from ProspectZone or most third-party providers, the BrokerOffice lead management system is the ideal tool to help your lead nurturing campaign. Top producers know from experience that many tools and features are required to effectively manage lead pipelines. The BrokerOffice lead management system puts all these tools at your fingertips with its convenient online dashboard to manage all your [insurance leads](#). You can communicate with leads and email proposals and forms to prospects with a click of the mouse. It'll also be easier to manage your lead pipeline with the handy account tracker and appointment scheduler. And these are just a few of the features included with your BrokerOffice lead manager.

The BrokerOffice lead management system is also designed to integrate with other Norvax tools, so you can manage your prospects across a variety of platforms. With the multi-carrier Norvax Quote Engine, you can use your automated lead manager to send up-to-date and customized proposals to all the leads in your database. You can even automate this drip marketing by adding the LeadMiner email autoresponder to your lead management solution. Finally, BrokerOffice can automatically receive the [medicare leads](#) generated by your Norvax agency website and add them to your BrokerOffice lead management pipeline. With the BrokerOffice lead management system, you'll have an all-in-one automation solution to manage all your health leads.

If you are a consumer looking for more quotes on your [health insurance](#), GoHealth can be a one stop shop for comparing plans and researching benefit options. The site can connect you to local insurance agents or give you instant pricing on all the carriers that offer plans in your state. If you are turning 65 or are already on Medicare, you can use GoMedicare to see all your Medicare Quotes. The site will help you choose between Medicare Supplements, [Medicare Advantage](#) and Medicare Part D. We know that everyone is different, so using a site that gives you a comprehensive overview of all your Medicare options will be key for you to make the right decision.

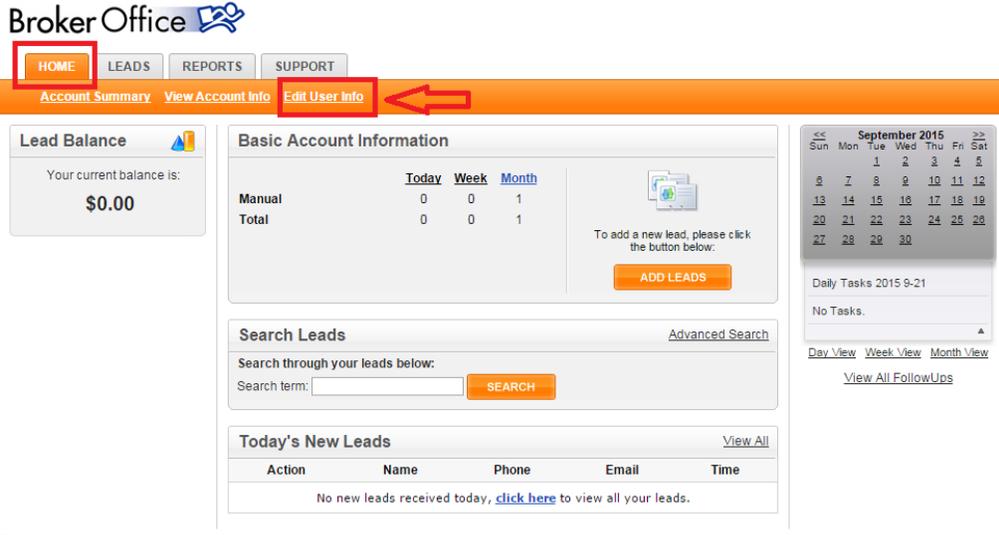
- You will be taken to your BrokerOffice homepage
 - *Note: When log onto BrokerOffice for the first time after your account is created, you will need to reset your BrokerOffice password before landing on the homepage.*

INITIAL SETUP

Adding FFM ID to BrokerOffice Account:

Note: All agents who wish to submit application on Federal Marketplace should complete this step

- Click on the “Home” tab
- Click “Edit User Info”



BrokerOffice

HOME LEADS REPORTS SUPPORT

Account Summary View Account Info **Edit User Info**

Lead Balance

Your current balance is:

\$0.00

Basic Account Information

	Today	Week	Month
Manual	0	0	1
Total	0	0	1

To add a new lead, please click the button below:

ADD LEADS

September 2015

Sun	Mon	Tue	Wed	Thu	Fri	Sat
		1	2	3	4	5
8	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

Daily Tasks 2015 9-21

No Tasks.

Day View Week View Month View

[View All FollowUps](#)

Search Leads [Advanced Search](#)

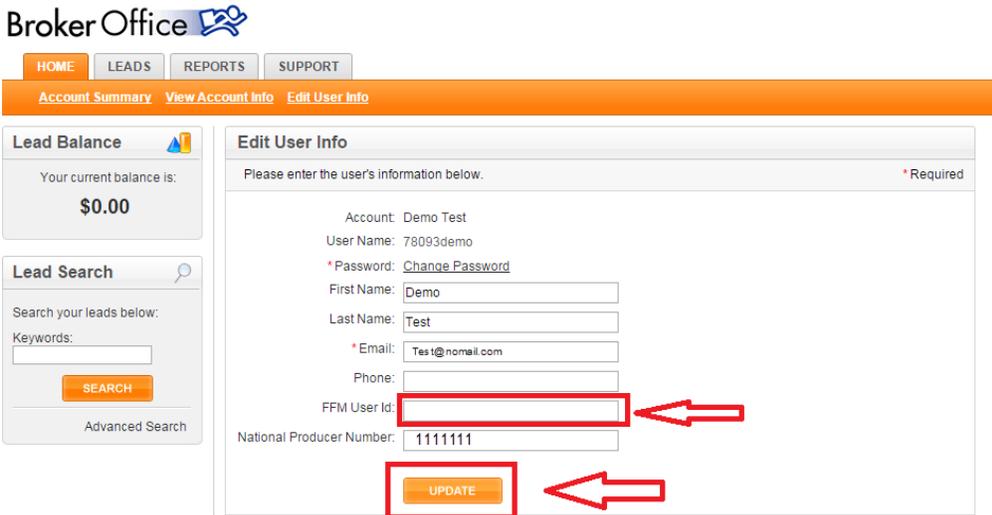
Search through your leads below:

Search term: **SEARCH**

Today's New Leads [View All](#)

Action	Name	Phone	Email	Time
No new leads received today, click here to view all your leads.				

- In the “Edit User Information” screen click the “FFM USER ID” box
- Enter your FFM ID (CMS login)
- Click “Update”



BrokerOffice

HOME LEADS REPORTS SUPPORT

Account Summary View Account Info **Edit User Info**

Lead Balance

Your current balance is:

\$0.00

Edit User Info

Please enter the user's information below. * Required

Account: Demo Test

User Name: 78093demo

* Password: [Change Password](#)

First Name:

Last Name:

* Email:

Phone:

FFM User Id: ←

National Producer Number:

UPDATE ←

Lead Search

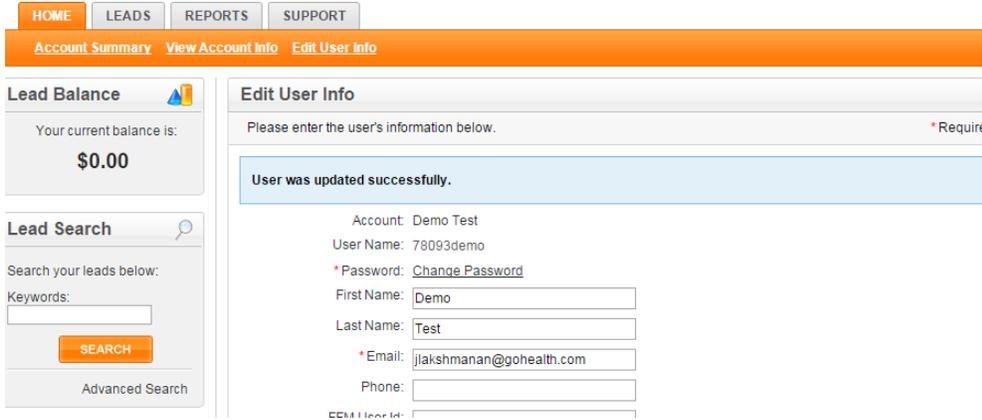
Search your leads below:

Keywords:

SEARCH

[Advanced Search](#)

- You will see a message at the top of the screen “User was updated successfully”



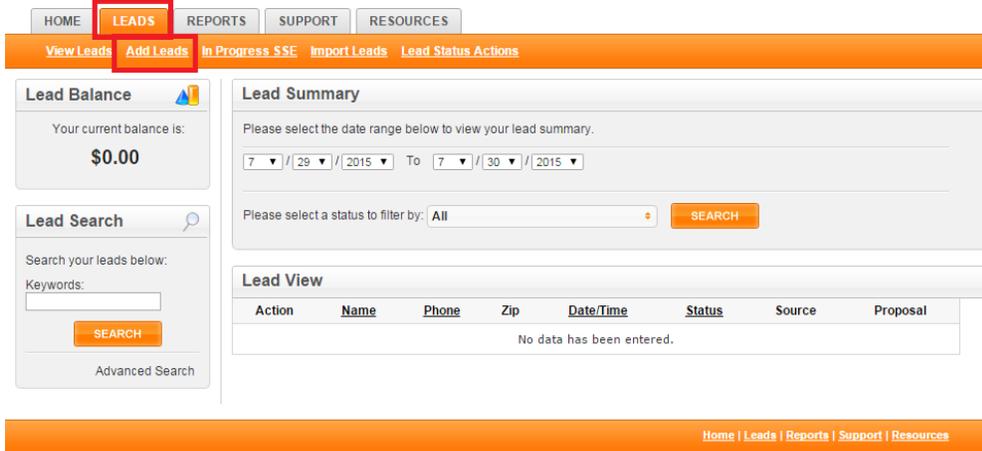
How to Quote/Enroll:

Adding Leads:

One of the more helpful tools in BrokerOffice is the ability to add and track leads. There are multiple ways you can add a single lead to your account.

- Click on “Add Leads” button on the home page
- Click the “Leads” tab and then select “Add Leads” from the menu below the tabs

BrokerOffice





- Enter the information for the leads
- Make sure to enter information in all required fields
 - Minimum info needed (first name, last name, zip code, & email address)
 - *Note: In order to launch a lead into a Marketplace session to quote and shop for health plans, an email address and zip code is required*
- Click **“Save”**
- **Green Marketplace button appears. This begins the shopping for all on and off exchange products.**



HOME LEADS REPORTS SUPPORT RESOURCES

View Leads Add Leads In Progress SSE Import Leads Lead Status Actions

Lead Balance

Your current balance is:

\$0.00

Lead Search

Search your leads below:

Keywords:

SEARCH

Advanced Search

Contact Information

*Required

Full Name:

Address 1: Address 2:

City: State:

*Zip Code:

Phone 1: Phone 2:

Email: [\(email lead\)](#) Fax:

Notes:

Status: Follow Up Date: / /

Reference:

Current Insurance

Insurance Company: Deductible:

Plan: Copay:

Premium: Coinsurance:

Personal Information

	Name	Gender	Date of Birth	Height	Weight (lbs)	Smoker	In Quote
Applicant:	<input type="text"/> (Reset)	-- ▼	<input type="text"/>	f ▼ Ir ▼	<input type="text"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Spouse:	<input type="text"/> (Reset)	-- ▼	<input type="text"/>	f ▼ Ir ▼	<input type="text"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Dependent:	<input type="text"/>						

Customized Fields

Contact Me: Currently Insured:

Best Contact Time: Current Medications:

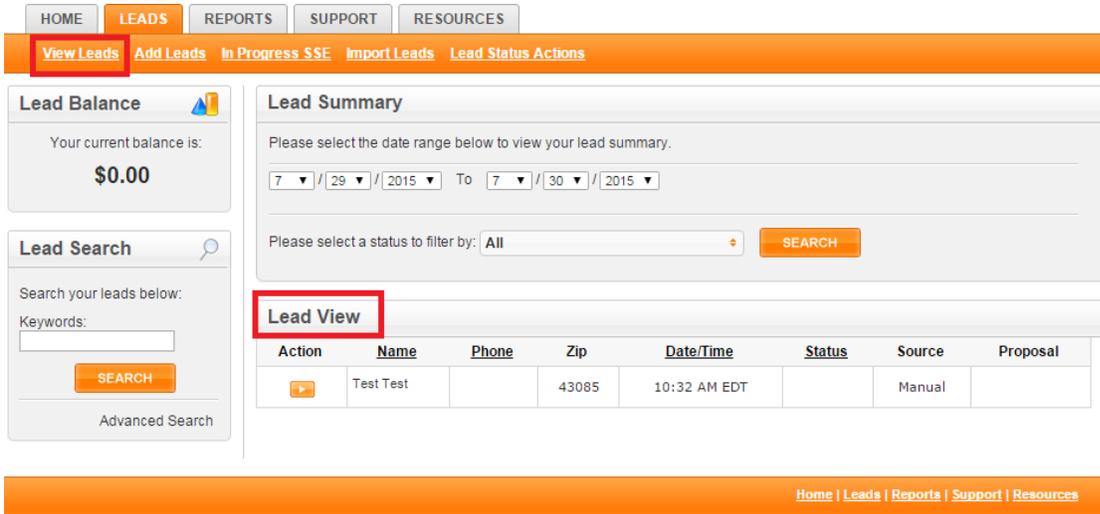
Health Conditions: Category:

SAVE ←

Viewing Leads:

- Click **“Leads”** tab and click the **“View Leads”** link to access the leads
- All your leads will be displayed under the **“Lead View”** section

Broker Office



HOME LEADS REPORTS SUPPORT RESOURCES

View Leads Add Leads In Progress SSE Import Leads Lead Status Actions

Lead Balance 

Your current balance is:
\$0.00

Lead Search 

Search your leads below:
Keywords:

SEARCH
Advanced Search

Lead Summary

Please select the date range below to view your lead summary.
7 / 29 / 2015 To 7 / 30 / 2015

Please select a status to filter by: All **SEARCH**

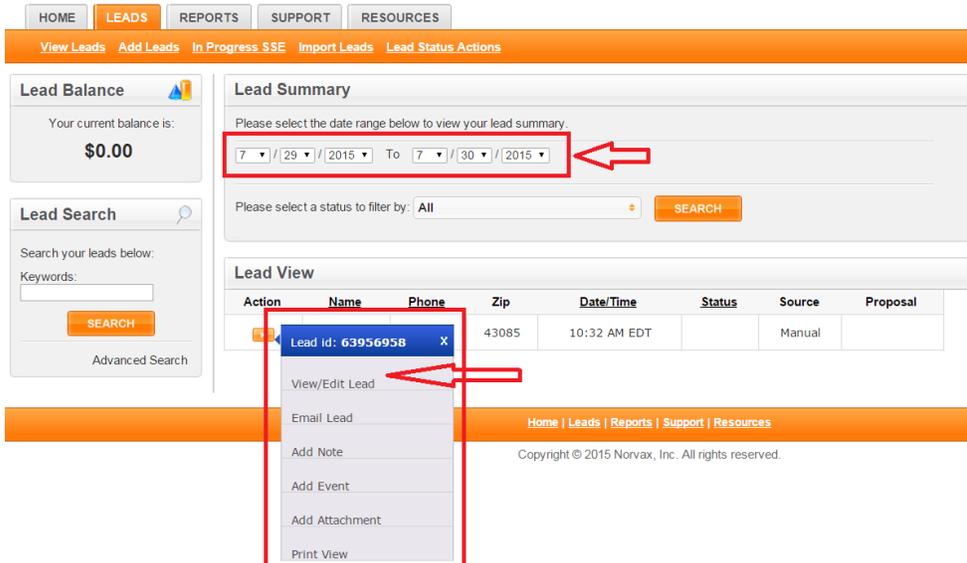
Lead View

Action	Name	Phone	Zip	Date/Time	Status	Source	Proposal
	Test Test		43085	10:32 AM EDT		Manual	

Home | Leads | Reports | Support | Resources

- If you have a large number of leads saved to your account, you can use the date range to search for leads based on the date they were created
- For a specific lead, click the orange **“Play”** button for additional options. From here, you can select **“View/Edit Lead”** to access the lead info

Broker Office



HOME LEADS REPORTS SUPPORT RESOURCES

View Leads Add Leads In Progress SSE Import Leads Lead Status Actions

Lead Balance 

Your current balance is:
\$0.00

Lead Search 

Search your leads below:
Keywords:

SEARCH
Advanced Search

Lead Summary

Please select the date range below to view your lead summary.
7 / 29 / 2015 To 7 / 30 / 2015

Please select a status to filter by: All **SEARCH**

Lead View

Action	Name	Phone	Zip	Date/Time	Status	Source	Proposal
	Lead id: 63956958 		43085	10:32 AM EDT		Manual	

View/Edit Lead
Email Lead
Add Note
Add Event
Add Attachment
Print View

Home | Leads | Reports | Support | Resources

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Quoting:

- Once you launch Quoting tool (Marketplace) from BrokerOffice, lead data provided in BrokerOffice will automatically pre-populate in Marketplace. If it does not:
 - Enter **“Date of Birth”**
 - Select **“Gender”**
 - Enter Smoking Status
 - If you would like to add a spouse or dependant to the application, click **“Add Spouse”** or **“Add Dependand”**
 - Click **“Continue”**
 - Enter the applicant’s contact information
 - Click **“View Plans”**



[Login](#) | [Create Account](#)

Call Us **(844) 843-3227**

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

Effective Date

For Testing Purposes Only - Not Visible in Production

Choose Effective Date
08/01/2016

You

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

Date of Birth (MM/DD/YYYY) Gender
06 / 05 / 1990 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 Dependand](#)

Contact Information

Please enter the contact information of the primary applicant.

First Name Last Name
Testing Test

Email Address Phone Number
test23@nomail.com (708) 426-3523

[View Plans](#)
I consent to the terms of this form

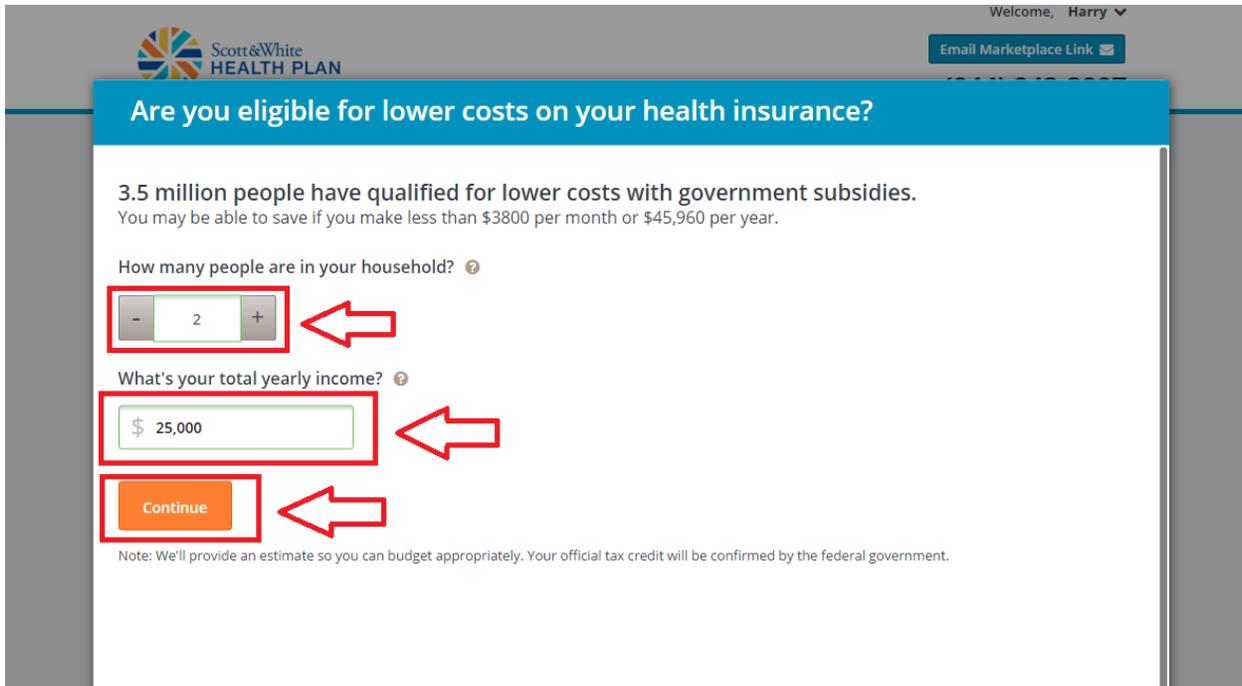
By clicking the button you consent to receive automated and/or pre-recorded telemarketing calls, emails, and text messages from or on behalf of Scott and White Health Plan at the telephone number and email address you provided above. You understand that consent is not a condition of purchase and you may also receive a quote by contacting us via phone. You may revoke this consent at any time by contacting us via phone to be placed on our do-not-call list.

Your carrier's message and data rates may apply. Scott and White Health Plan does not charge you for sending or receiving text messages. If you are Medicare-eligible a representative will call you about a Medicare Advantage plan, Medicare Prescription Drug plan, Medicare Supplement plan or other Medicare plans. By using this form you agree to the terms of our [Privacy Policy](#).

Attention: This website is operated by Scott & White Health Plan and is not the Health Insurance Marketplace website. In offering this website, Scott & White Health Plan is required to comply with all applicable federal laws, including the standards established under 45 CFR 155.220(c) and (d) and standards established under 45 CFR 155.260 to protect the privacy and security of personally identifiable information. This website may not display all data on Qualified Health Plans being offered in your state through the Health Insurance Marketplace website. To see all available data on Qualified Health Plan options in your state, go to the Health Insurance Marketplace website at healthcare.gov.

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- Once the quoting platform initiates, you will be asked to provide the applicant's household size and yearly income to determine eligibility for subsidized health insurance.
 - **TO SKIP THIS STEP:** *Note: If the consumer would not like to provide income, you can hit the "Esc" on your keyboard to skip this step*
- If the consumer would like to see if they qualify for a tax credit:
 - Enter the total number of individuals living in the household
 - *Note: Even if the application is on behalf of one individual, household size provided in this screen should be inclusive of everyone who will be reported on the applicant's tax return*
 - Enter the total yearly income
 - *Note: This income should be inclusive of all members of the household*



Welcome, Harry ▾

Email Marketplace Link

Are you eligible for lower costs on your health insurance?

3.5 million people have qualified for lower costs with government subsidies.
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? ⓘ

- 2 +

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.

Note: Your estimated subsidy amount will be calculated based on the information you provide.



- If the applicant's subsidy eligibility information needs to be revised, you can do so by clicking the "Edit" link
- Plans can also be filtered using the options available in the "Shop By" menu on the left side of the screen
 - **Note: You can filter between "Tax Credit Eligible" or "Non-Tax Credit Eligible" plans by selecting "Yes" or "No" in this filter**
- If the applicant qualifies for subsidized health insurance, then an estimate of the subsidy amount that will be applied is available in the white box above the plans
 - **Note: The estimated savings are not final. The actual subsidy amount will be determined after the application is submitted to the FFM.**
- You can identify an On Market plan by the  Tax Credit Eligible icon shown under the "Max Out-Of-Pocket" for each plan
- To move forward with the application for a specific plan, click "Continue"



Welcome, Troy ▾

Email Marketplace Link ✉

Call Us (844) 843-3227

TIM TURNER IS ASSISTING TROY AIKMAN

38 Plans found
Show All Plans

Shop by

- Deductible >
- Copayment >
- Max Out-Of-Pocket >
- Plan Type >
- Plan Categories >
- Monthly Premium >
- Tax Credit Eligible >**
- Pediatric Dental >
- HSA Eligible >

Health Plans

Showing 38 of 38 plans starting at \$267.85 a month.
Quote results for 1 applicant in TX. (Edit)
Estimated monthly cost savings of \$157.00 applied. (Edit)

Some plans listed below are available as both tax credit eligible and non-tax credit eligible. Since we have estimated that you may be eligible for a tax credit, we'll show you the tax credit eligible versions of those plans.

SORT PLANS BY Premium ▾

Plan Type	Deductible	PCP Visit Copay	Max Out-Of-Pocket	Plan Details
HMO	\$6,000	Not Applicable	\$6,850	View

Compare  Bronze  Tax Credit Eligible

Scott and White
Scott and White Health Plan Bronze 6000/500v
Plan ID: 40788TX0170001

ORIGINAL MONTHLY PREMIUM
\$267.85

YOUR MONTHLY PREMIUM
\$110.85

Continue