Quick Guide for Scott & White

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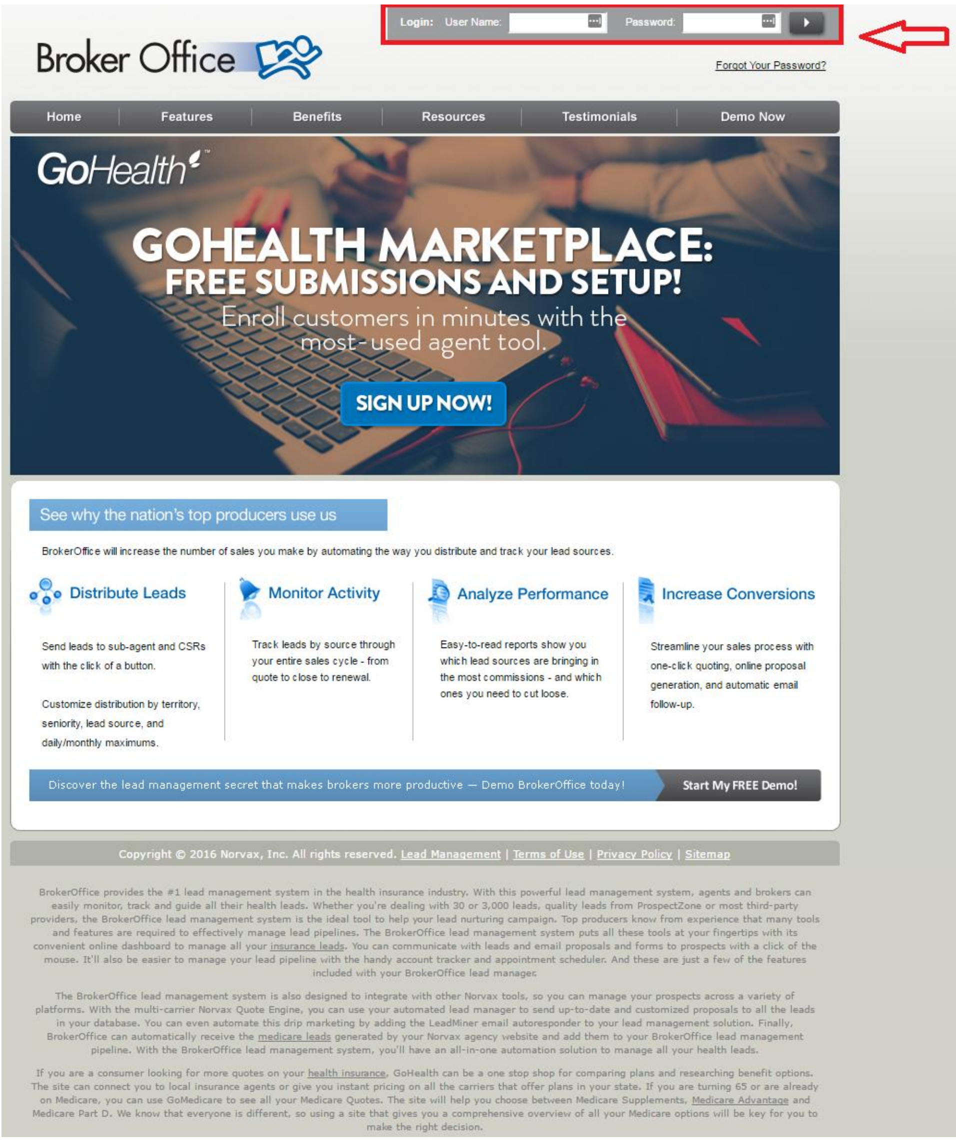
Logging Into BrokerOffice:

- 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



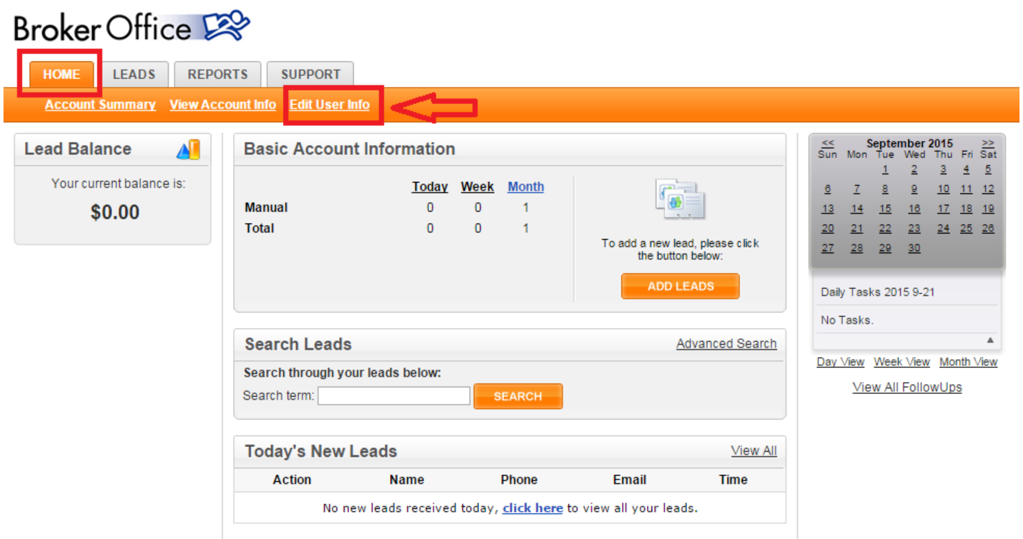
- You will be taken to your BrokerOffice homepage
    - *Note: When log onto BrokerOffice for the first time after your account is created, you will need to reset your BrokerOffice password before landing on the homepage.*

INITIAL SETUP

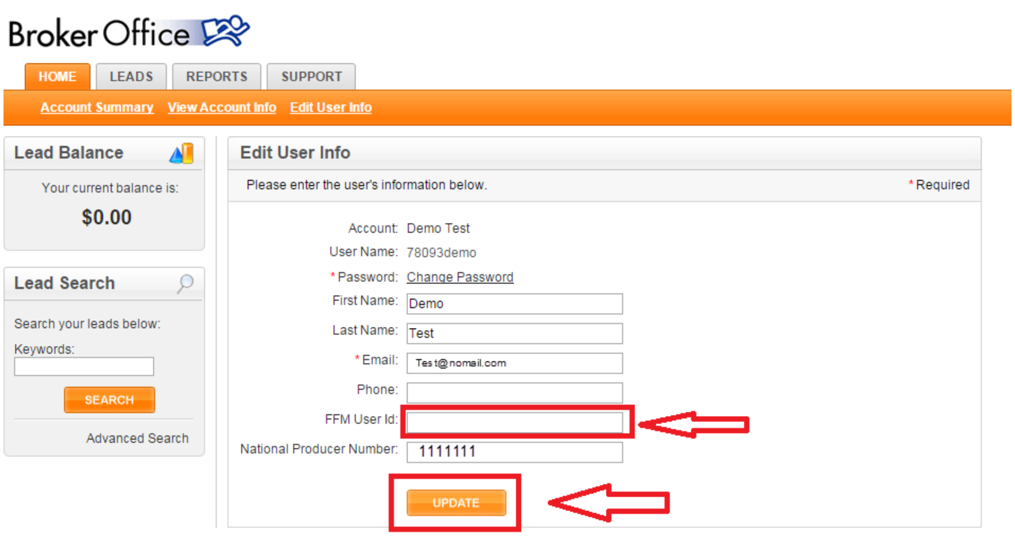
Adding FFM ID to BrokerOffice Account:

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

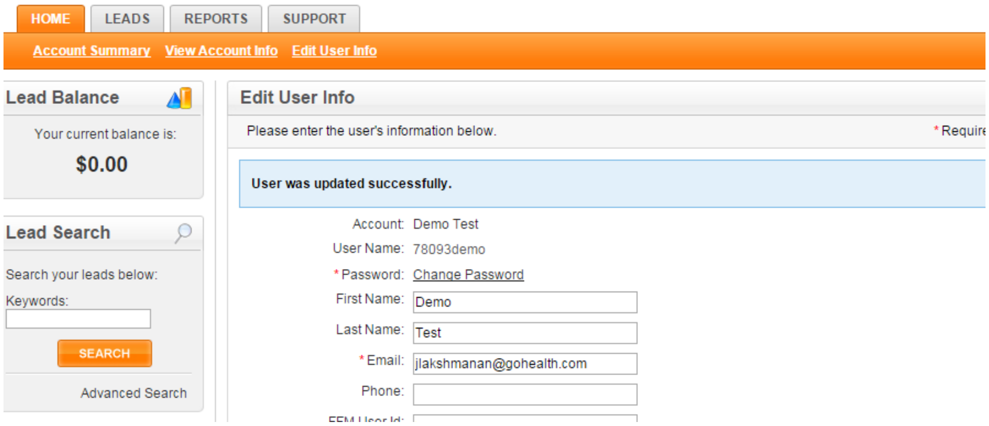
- Click on the **"Home"** tab
- Click "**Edit User Info**"



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



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

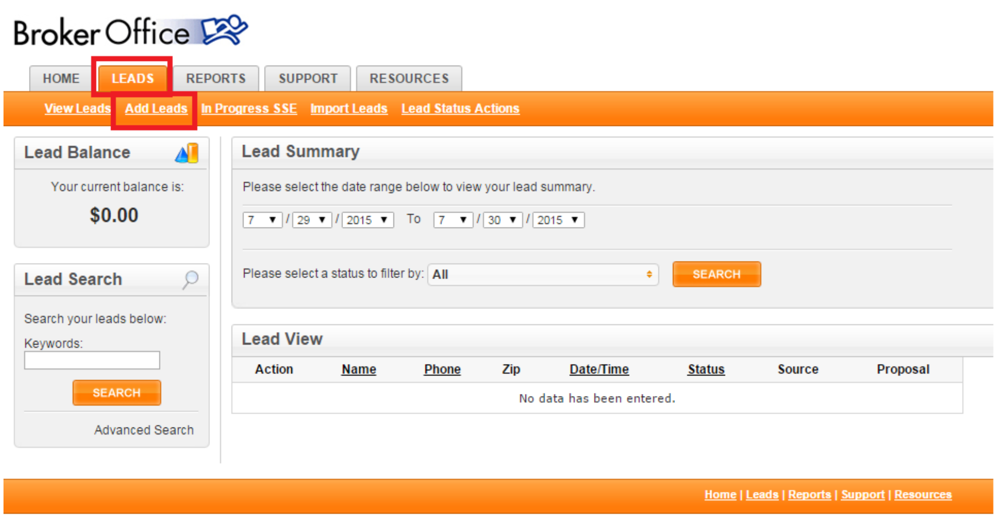


How to Quote/Enroll:

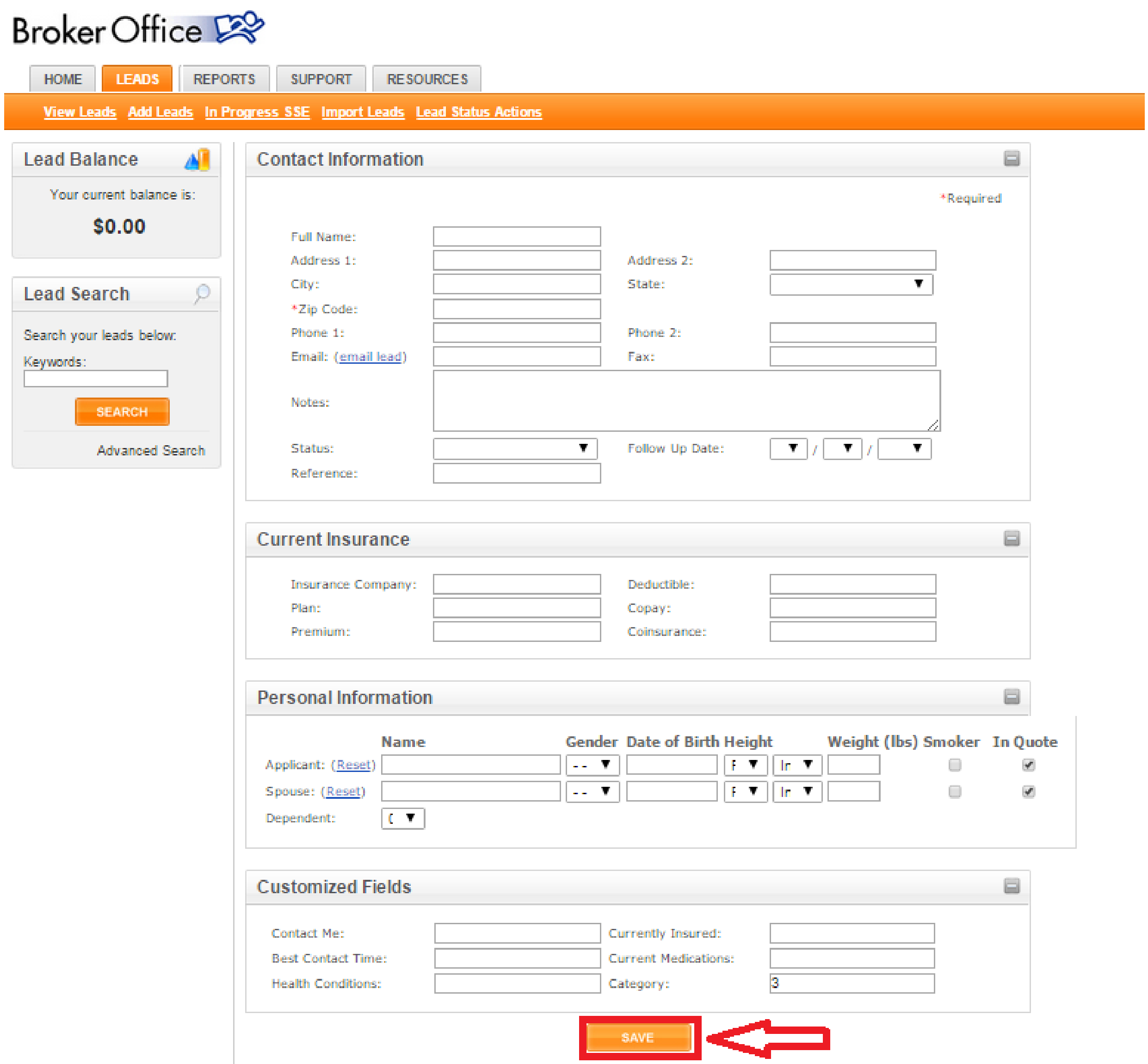
Adding Leads:

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

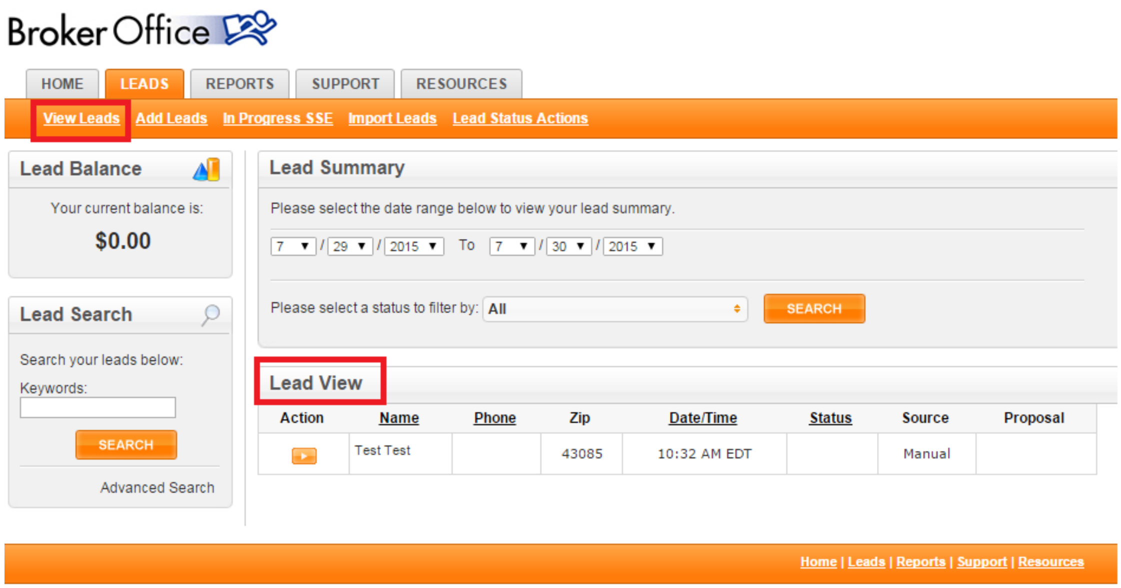


- Enter the information for the leads
- Make sure to enter information in all required fields
  - Minimum info needed (first name, last name, zip code, & email address)
  - *Note: In order to launch a lead into a Marketplace session to quote and shop for health plans, an email address and zip code is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

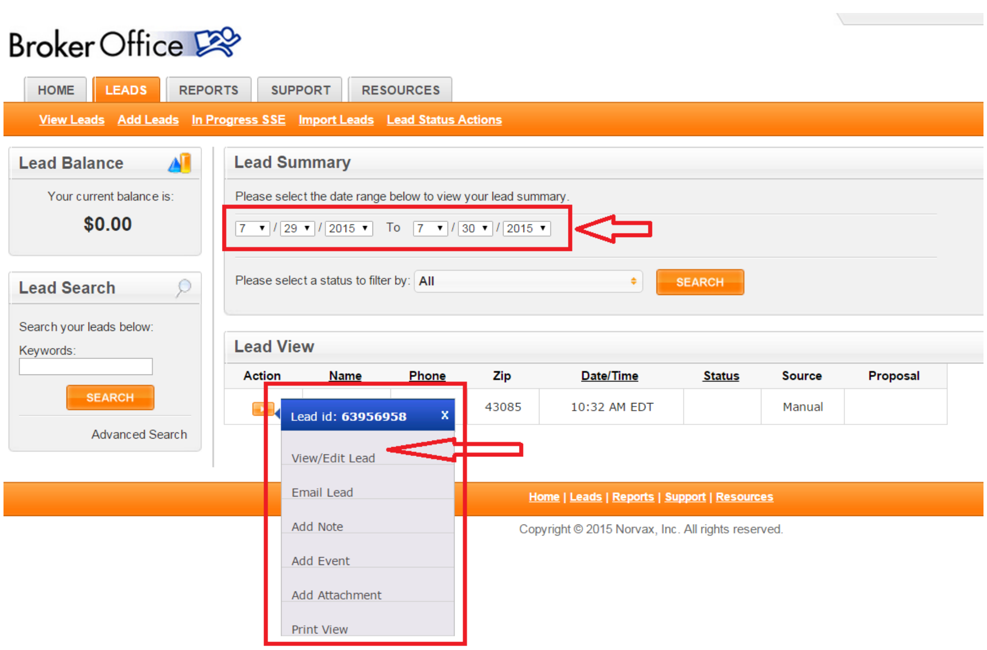


Viewing Leads:

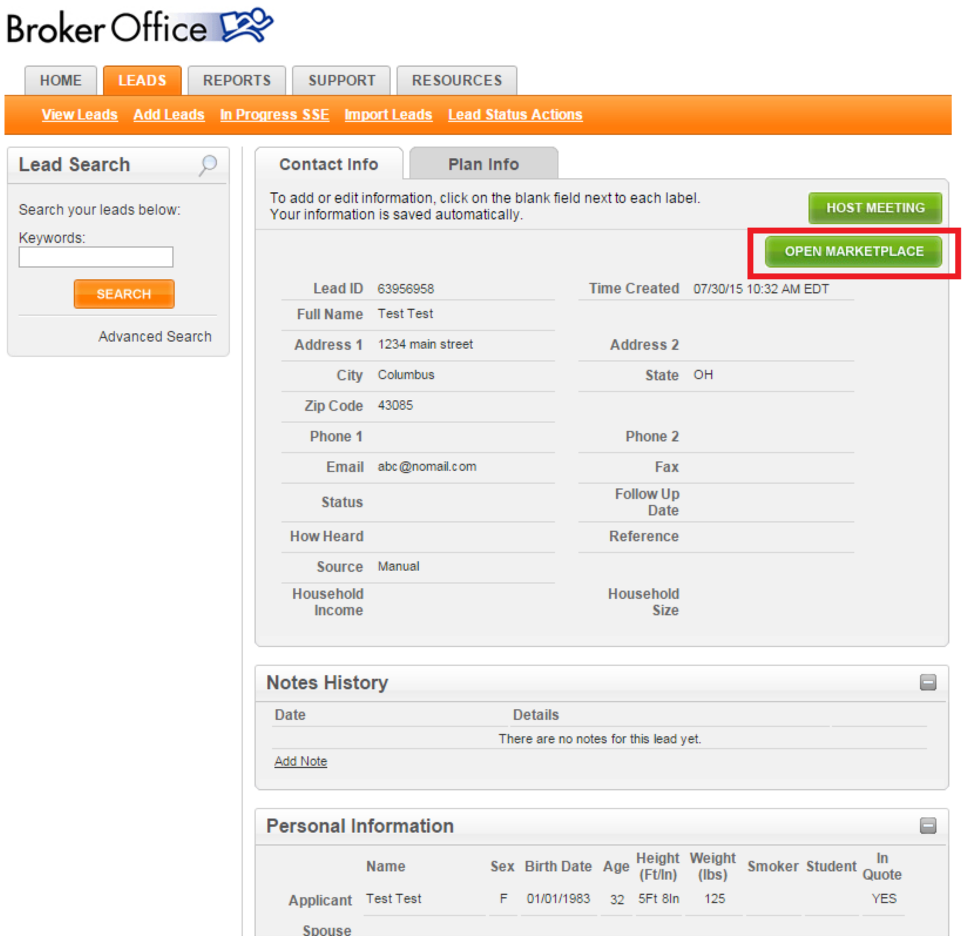
- Click **"Leads"** tab and click the **"View Leads"** link to access the leads
- All your leads will be displayed under the **"Lead View"** section



- 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



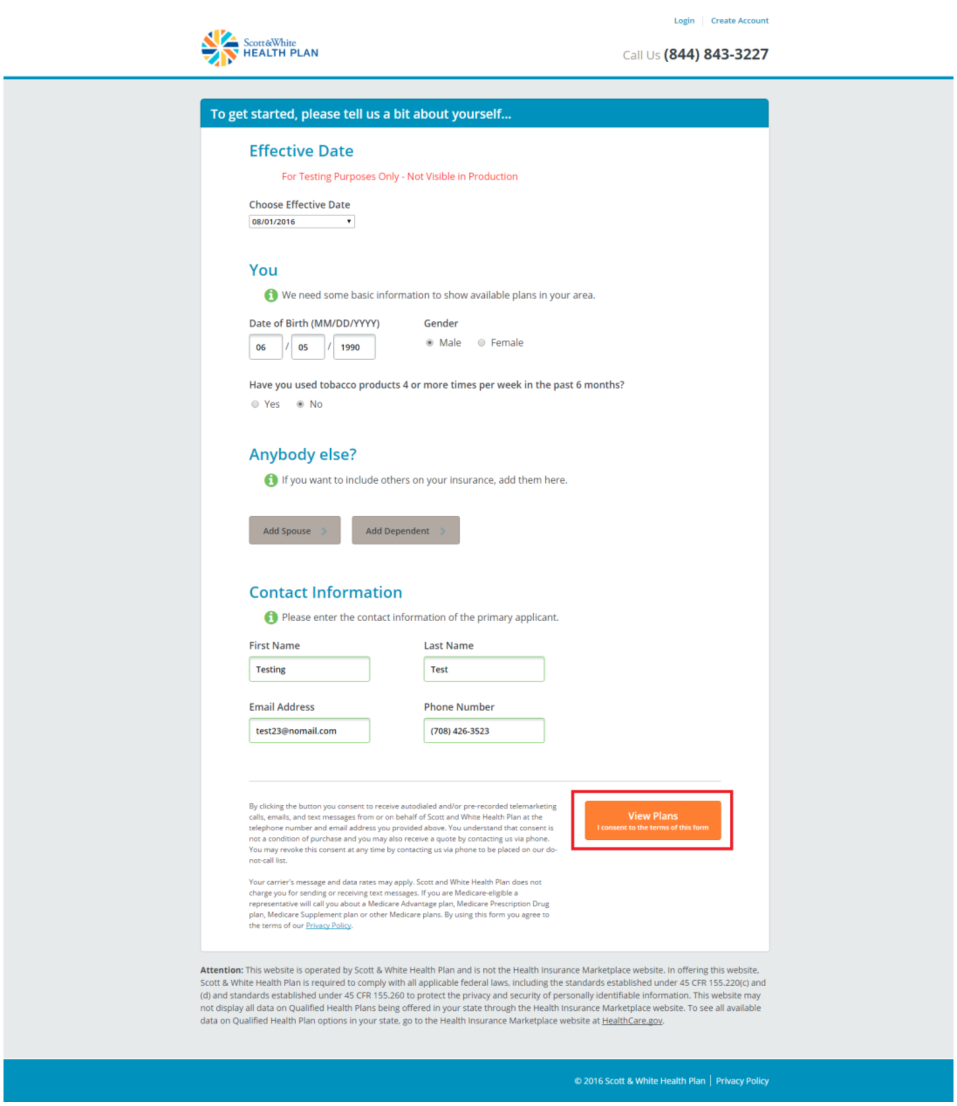
- You can launch the Quoting/Enrollment tool for both On & Off Exchange by clicking the green **“OPEN MARKETPLACE”** button



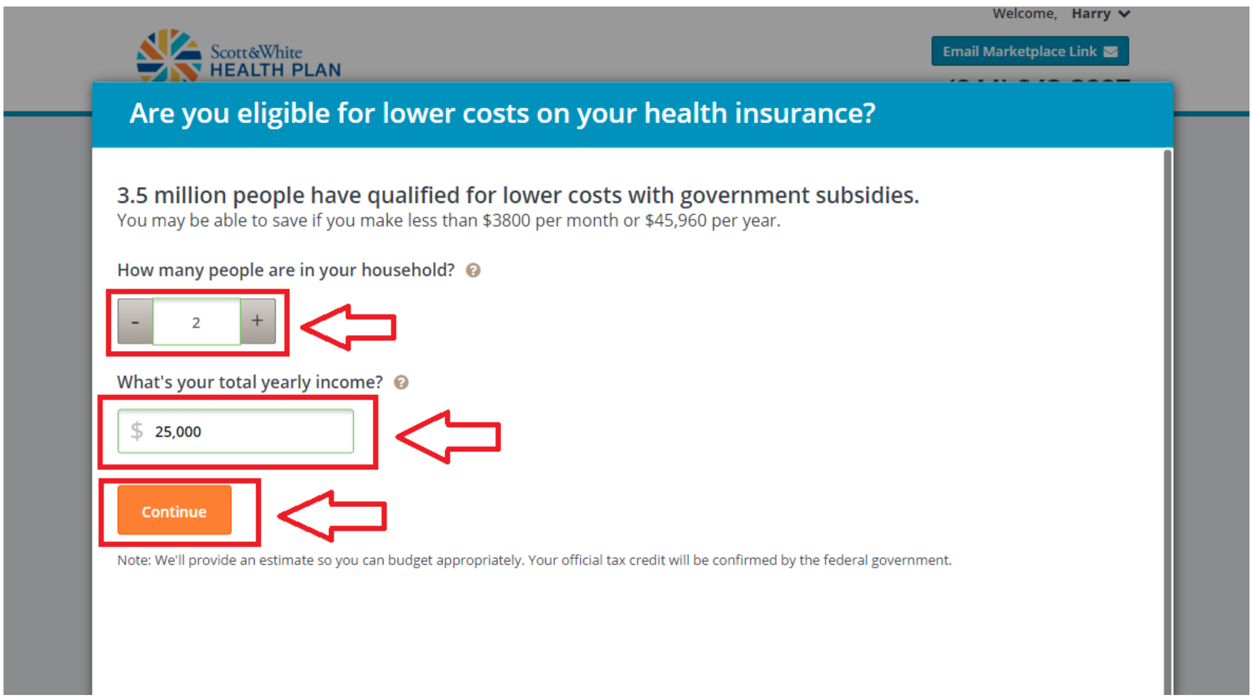
Scott&White
HEALTH PLAN

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 Dependant"**
    - Click **"Continue"**
    - Enter the applicant's contact information
    - Click **"View Plans"**



- 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*



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"**