

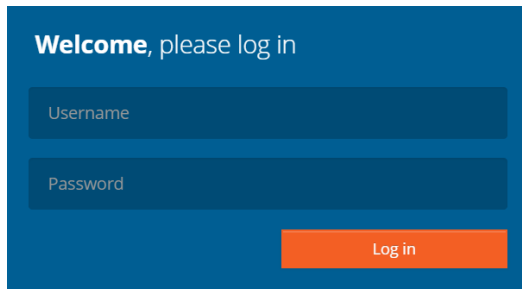
## Custom Group Client Process Flow Document

Welcome to our custom group platform workflow document!

This guide is designed to focus specifically on the Custom Group Client module and enrollment setup. Please note, the platform can be used for benefits administration of any size of account and this platform can enroll non-benefitted Employees too.

The screenshot displays a dashboard interface for managing a custom group client. At the top, there are four main action buttons: 'CREATE EMPLOYER', 'MULTIPLE EMPLOYER UPLOAD', 'CREATE EMPLOYEE', and 'DELETE', each with a user icon and the text 'On your dashboard'. Below these is a search bar labeled 'Business Name Search' with a 'List all or Search' dropdown and a 'GO' button. The main content area is titled 'Business: Summer Season' and includes a link for 'Add Employee Direct Pay / Ancillary Plans'. The dashboard is organized into a grid of 12 task cards, each with a user icon, a title, and a brief description. The cards are: 'SET UP ACCOUNT' (Enter information about the company and plans to enroll), 'PLAN DETAIL' (See the current plans available), 'EMPLOYEE INFORMATION' (with a search bar and 'GO' button), 'COMPANY INFORMATION' (View/update the company's details), 'CONTACTS INFORMATION' (View/update the Primary and Secondary contacts), 'UPLOAD CENSUS', 'SELECT PLANS TO OFFER', 'PLAN BUILDER' (Set up the plans to enroll), 'MEDICAL' (For Medical Plans), 'DENTAL' (For Dental Plans), and 'CRITICAL ILLNESS' (For Critical Illness Plans). Green checkmarks are visible next to the 'COMPANY INFORMATION', 'CONTACTS INFORMATION', 'SELECT PLANS TO OFFER', 'MEDICAL', 'DENTAL', and 'CRITICAL ILLNESS' cards.

# Custom Group Client Process Flow Document

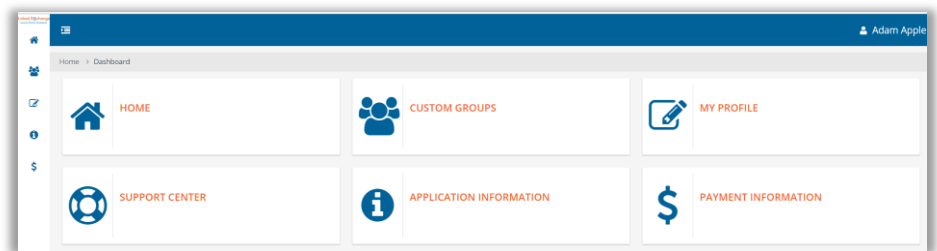


You can access this login page by going directly to:

[Linked.Exchange](#)

This is your home page. The buttons on the left side of the page allow you to navigate around the site.

To access the Custom Group Client Center, click on the **CUSTOM GROUPS** button on the right side of the screen.



## Linked.Exchange Insurance Platform Development

 Home

 Custom Groups

 My Profile

 Application Information

 Payment Information

Here's a quick overview of the **Broker Portal** menu:

**Note:** The screenshots below are of basic services. Please contact us if you would like to learn more about our additional options.

**HOME** will redirect the user back to the dashboard from any page.

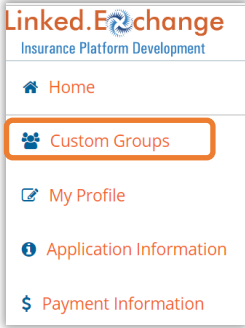
**CUSTOM GROUPS** will redirect the user to the Custom Groups management page. This is where the user creates new custom groups, Employees, custom insurance plan options for enrollment in addition to managing existing custom groups.

**MY PROFILE** is where the user information stored.

**APPLICATION INFORMATION** is where the user can access all application information for submitted and approved policies.

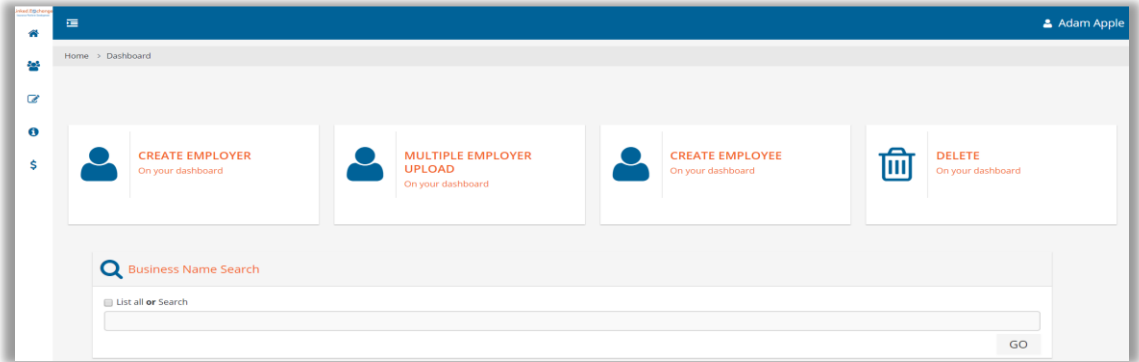
**PAYMENT INFORMATION** is where the user tracks all invoice payments for their clients. This is a premium service.

# Broker Portal



To enter the Custom Group Client Center, click on the **CUSTOM GROUPS** button or link on the menu, located on the left side of your screen.

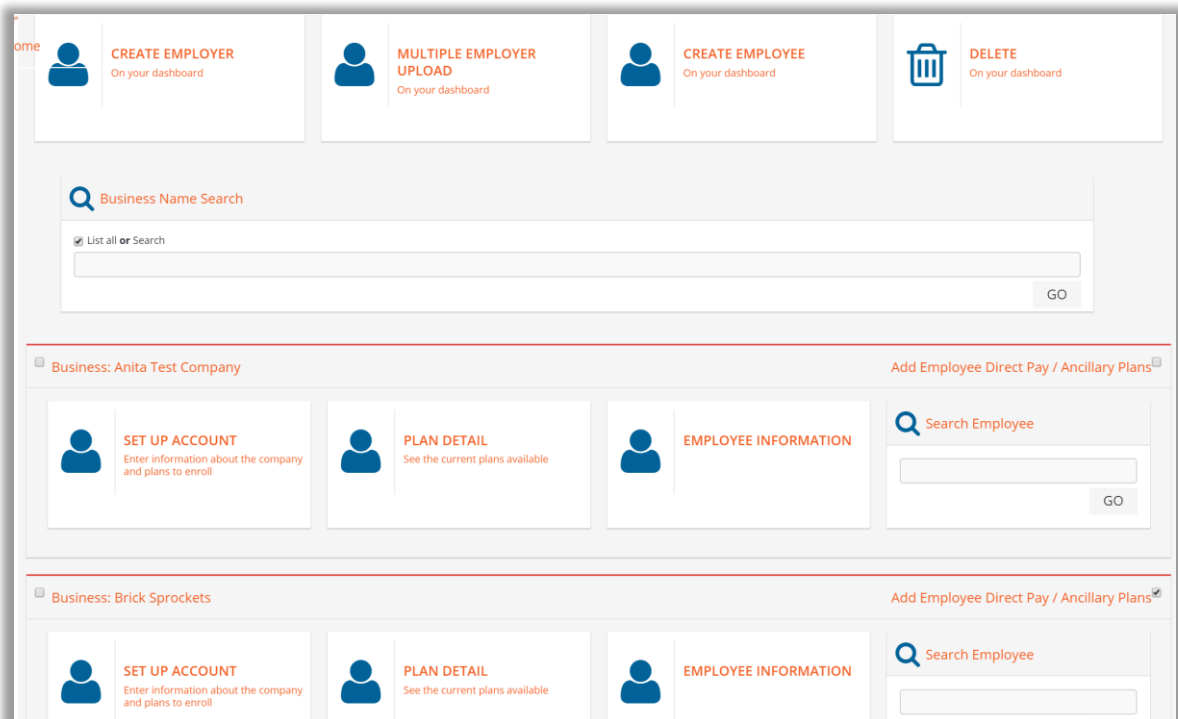
When you select **CUSTOM GROUPS**, you will see the screen below:



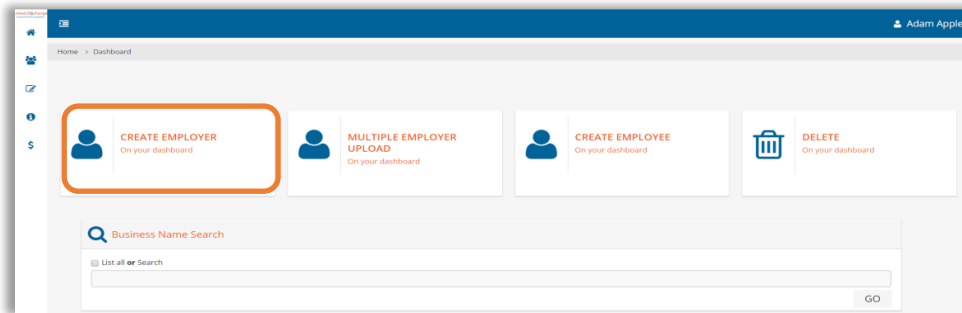
You can search for a specific company name or check the box to “list all” in the center of the page to the left. You now have a list of your custom group clients. This is your dashboard to manage your accounts. You can:

- Build new plans for quoting and enrollment
- Create new Employees
- Upload a census to dynamically create Employee access/dashboards
- Search for “pending” “enrolled” or “terminated” Employees by account

And More!



# Setting Up Employer Access

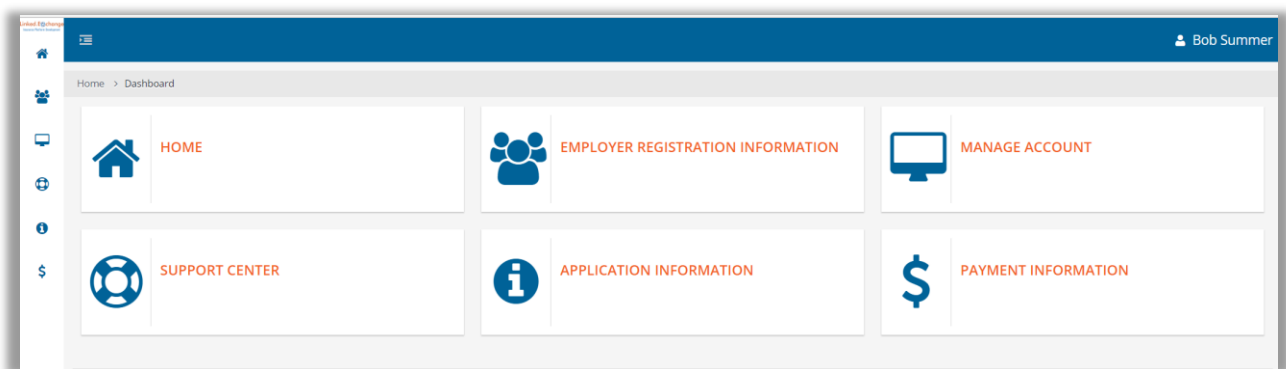


To give the Employer their own private login, click **CREATE EMPLOYER**.

This login is for the person who will handle the process inside the company. You can build a second contact person when completing the account set-up to identify the business owner or other executive of the company.

The user level being set up is strictly for the company, not for that person's personal enrollment in a company plan. We suggest each company have a specific email address assigned to the Employee representative handling Employees' enrollments versus their own specific benefit enrollment elections. All this information can be modified or changed at any point in the future by you or the person who has the company-level access. The only field limited to being changed by the specific user is the password field.

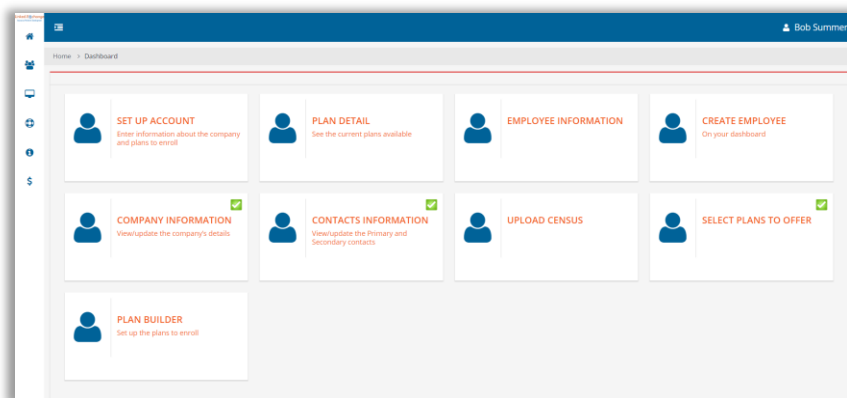
When you fill out this form, you set them up with an initial password you will need to provide to them, along with the username. Suggest they change the password after their first login so it's more secure. Once they change the password, they will need to use the password reset process if they forget it. You cannot change it for them.



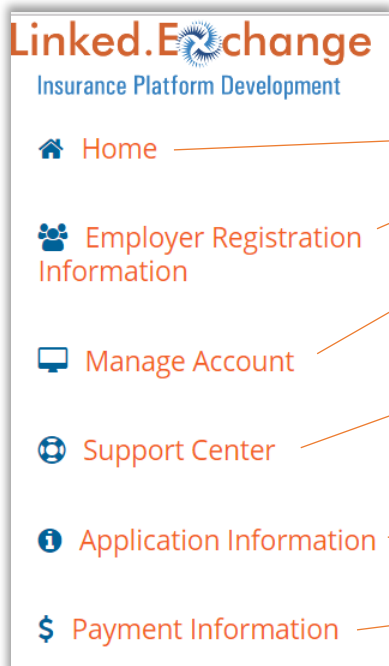
The Employer can now login with the username and password you assigned to them. Note: the Employer can change the password through their portal if they choose to do so.

The Employers' dashboard is similar to yours. They also have access buttons for:

- Setting up Employee's in the system
- Uploading census files
- Enrolling & terminating Employees
- Tracking current and previous enrollments
- Tracking invoice payments
- And more!



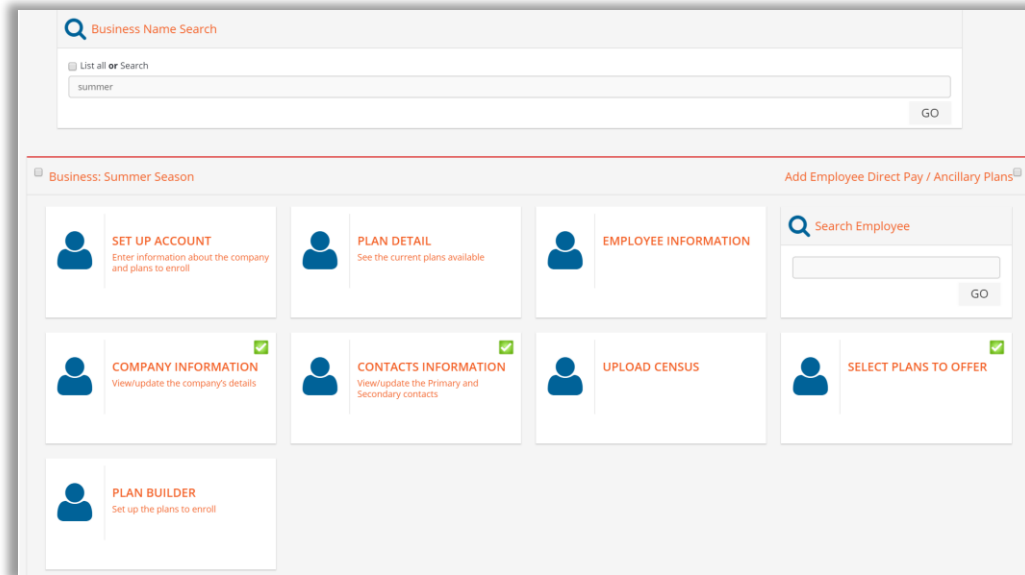
Depending on your subscription level the Employer dashboard could have more or less features than you see on this page. In this example the Employer has access to six account control options:



- **HOME** redirects the Employer to the dashboard home page
- **EMPLOYER REGISTRATION INFORMATION** displays the group Administrator information such as the login name, email and etc.
- **MANAGE ACCOUNT** allows the Employer to view, create or modify Employee benefit plan designs. This functionality can be disabled by the Administrator.
- **SUPPORT CENTER** provides access to the Employer to request platform assistance. This functionality can be expanded to include any support departments needed such as sales, claims and etc.
- **APPLICATION INFORMATION** provides enrollment detail for current and previous plan enrollments. If PDF applications were taken, they can be accessed here.
- **PAYMENT INFORMATION** allows the Employer to track or automate payments.

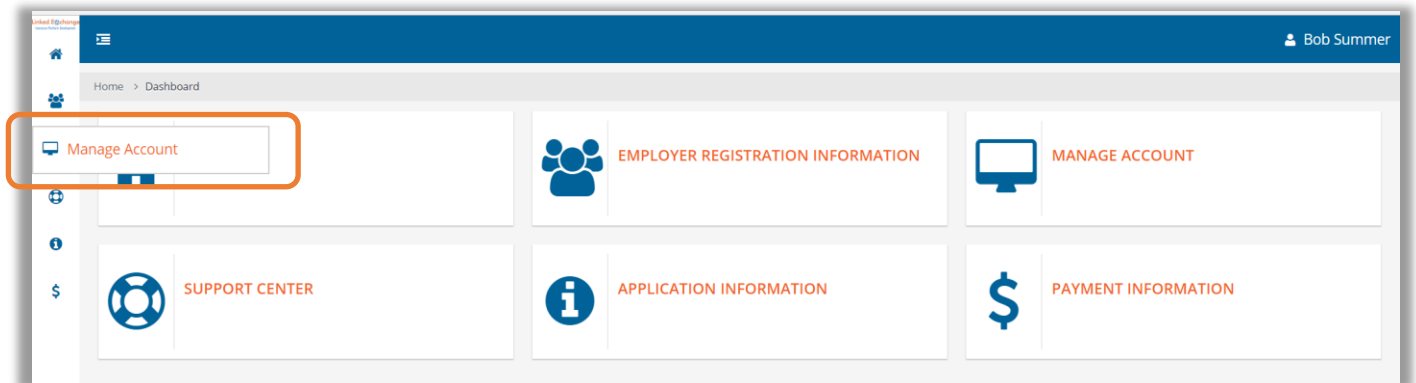
# Creating Custom Plans For Quoting & Enrollment

From the Broker Portal:



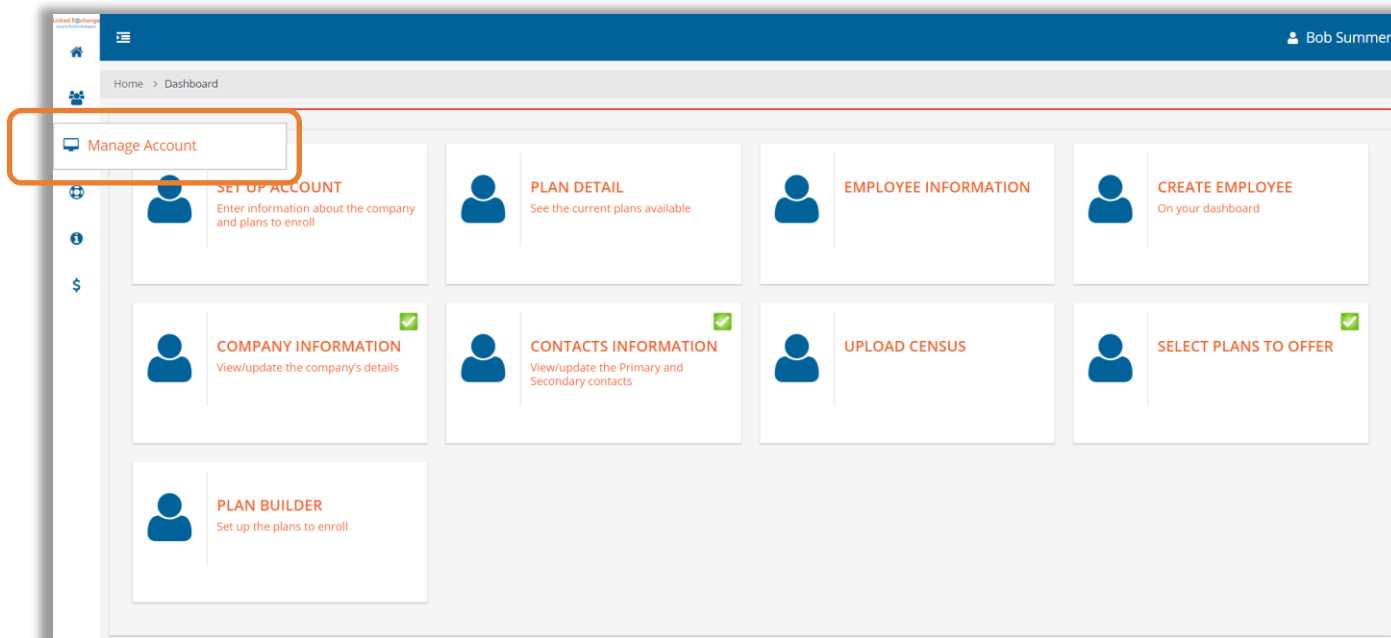
The page displayed above is of the Broker dashboard. The Broker can create new accounts, custom plan designs and new Employees for each custom group. In addition, the Broker can start the set-up process and allow the custom group/Employer to complete the account set-up process using the Employer self-service, “Employer Dashboard”.

From the Employer Portal:



The Employer will be able to view all plans and detail on Employees created by the Broker. The Employer can also complete plan design and enrollment rules on their own. The view and edit functionality can be disabled so the Employer does not have access to this functionality.

When the Employer clicks to manage account notice the page is almost identical to the Broker dashboard view. At this point the Employer can click “Select Plans To Offer” to view, add or create plans. The process is the same for the Broker when accessing the account through their Broker dashboard.



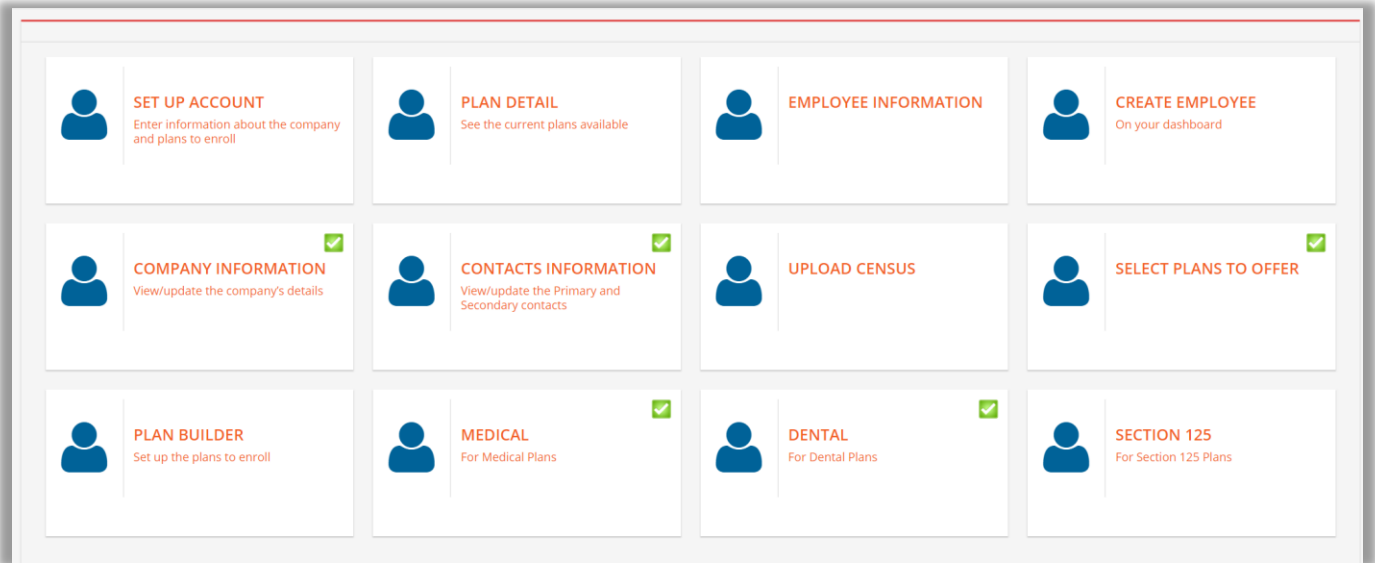
After clicking **SELECT PLANS TO OFFER**, the page below appears. All the Broker, Administrator or Employer needs to do is check the boxes for the plans they want to create for quoting and enrollment. After all the boxes have been checked, click **SUBMIT**.

The screenshot shows the "Plans to Enroll" form with a list of options and checkboxes. The "Submit" button is highlighted in blue.

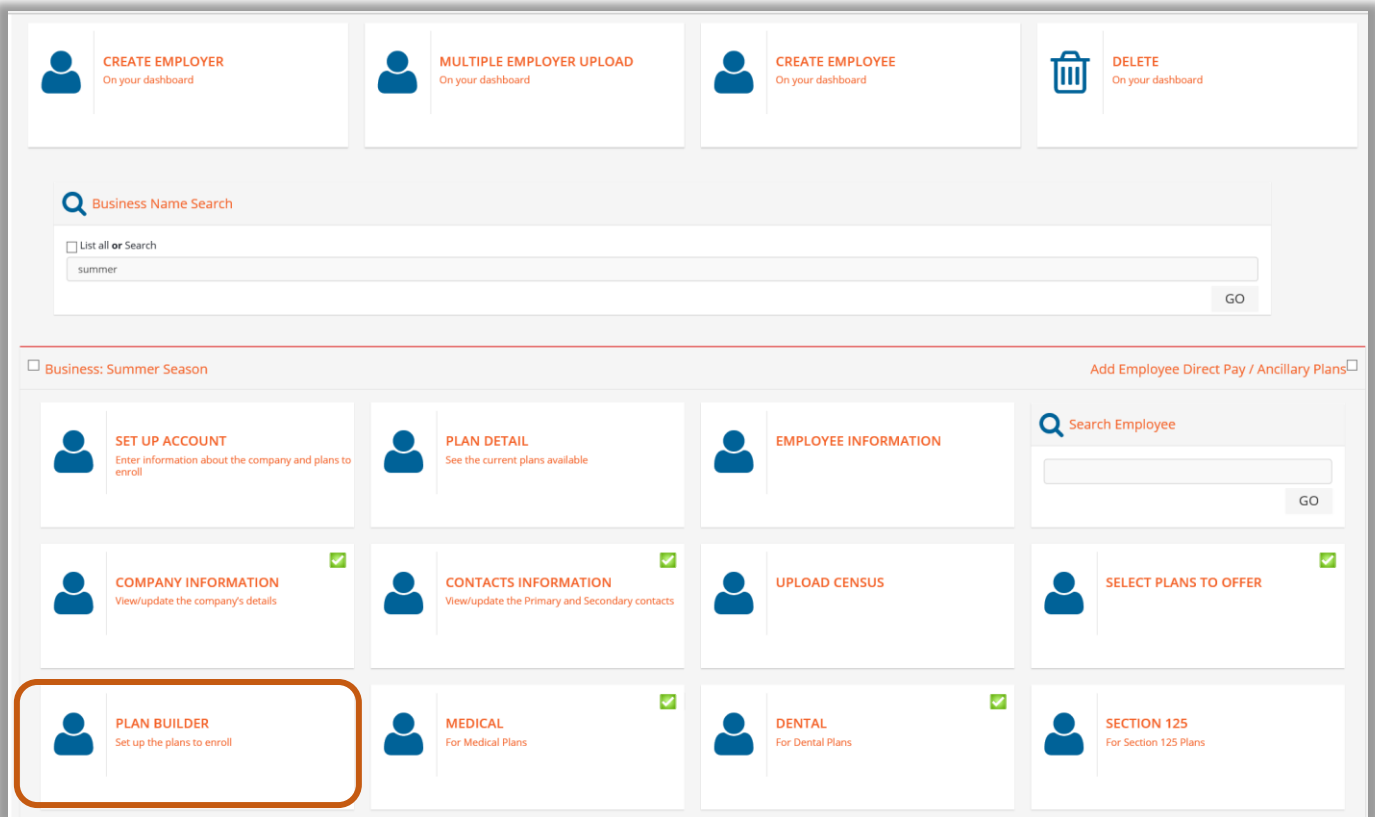
Plan Type	Checked
Medical	<input checked="" type="checkbox"/>
Dental (if separate from Medical)	<input checked="" type="checkbox"/>
Vision (if separate from Medical)	<input type="checkbox"/>
Medical Gap	<input checked="" type="checkbox"/>
Hospital Indemnity/Supplemental Health	<input type="checkbox"/>
Critical Illness	<input checked="" type="checkbox"/>
Cancer	<input checked="" type="checkbox"/>
Accident	<input checked="" type="checkbox"/>
Long-Term Disability	<input checked="" type="checkbox"/>
Term Life	<input type="checkbox"/>
Whole Life	<input type="checkbox"/>
Child-only Life	<input type="checkbox"/>
Flexible Spending Accounts (Section 125)	<input checked="" type="checkbox"/>

Buttons: Cancel, Submit, Clear Form

This screenshot shows you the Employer dashboard.



This screenshot is of the Broker dashboard.



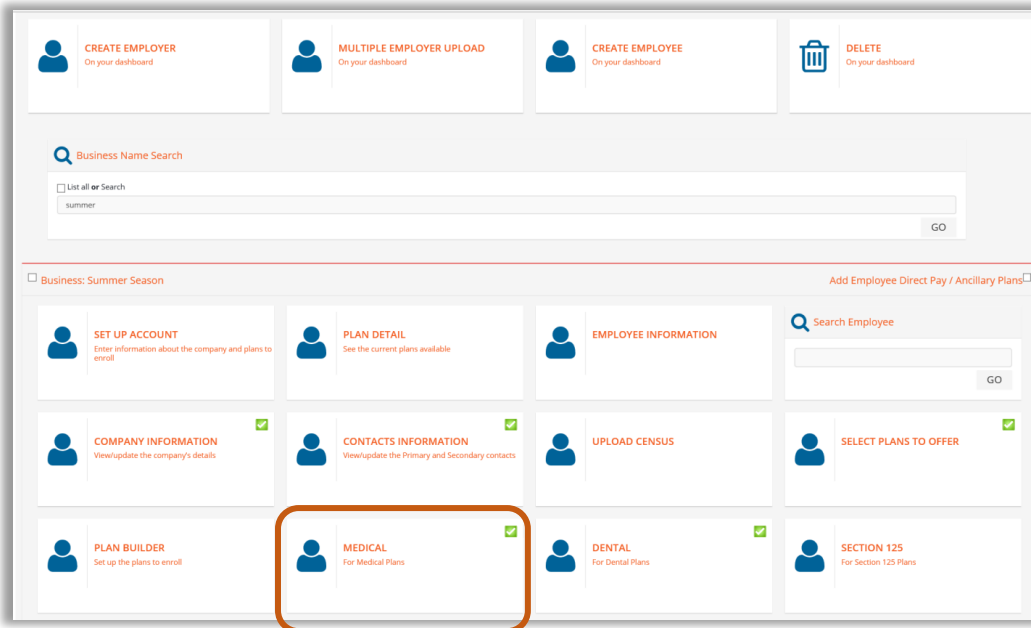
When either the Employer or the Broker update information, other approved users will see the information immediately upon save and the refreshing of the browser. That includes updates made to plan designs, Employee enrollments or administrative tasks like family status changes.

In the screenshot above, the **PLAN BUILDER** button was clicked. This opened the different plan options selected by the user: **MEDICAL**, **DENTAL** and **SECTION 125** were selected to be offered for this specific account.



# Setting Up A New Custom Group Client

In this example, we have clicked on the **MEDICAL** button after selecting the **PLAN BUILDER**.



When we click the **MEDICAL** button, the setup form appears to let the user build the plan to display to the user during enrollment.

In the first screenshot below, you can set up the criteria for eligibility and the open enrollment for Medical:

A screenshot of the 'Medical Plan Coverage Types' setup form. The form is divided into several sections with blue headers: 'Medical Plan Coverage Types', 'Eligibility for Medical', 'New Hire Criteria', 'Contributions to Medical Premiums', and 'Enrollment Period for Medical'. Under 'Medical Plan Coverage Types', there are checkboxes for 'Employee', 'Employee + Spouse', 'Employee + Children', and 'Family', all of which are checked. The 'Eligibility for Medical' section includes checkboxes for 'Full-Time', 'Part-Time', 'Temporary/Seasonal', and '1099', with 'Full-Time' checked. It also has radio buttons for 'Is Medical offered on a pre-tax basis?' with 'Yes' selected. The 'New Hire Criteria' section has dropdown menus for 'New Hire eligibility criteria' (set to '3. After a certain number of days'), 'Number of days to enroll' (set to '30 days'), and 'Number of days to wait' (set to '30 days'). The 'Contributions to Medical Premiums' section has checkboxes for 'Employee' and 'Dependents', both unchecked. It also has radio buttons for 'What is the contribution method?' with 'Flat Dollar Amount' selected and an input field for the amount. The 'Enrollment Period for Medical' section has input fields for 'Open Enrollment Start Date' (11-01-2017), 'Open Enrollment End Date' (11-30-2017), 'Effective Date' (12-01-2017), and 'Renewal Date' (12-01-2018), each with a blue '...' button next to it.

**Next Step: Medical Plan 1**

Please select what you would like to do:  Create a new custom plan  Select from a list of plans I've already created

**Medical Plan #1:**

*Please enter the information below exactly as you want it to appear.*

Carrier Name:  Plan Name:  Plan ID:  Plan Type:

Display plan to employees?  Yes  No

Does this medical plan include dental coverage (other than 'child-only' dental)? (answer 'No' for dental plans that are offered separately)  Yes  No

Does this medical plan include Vision? (answer 'No' for vision plans that are offered separately)  Yes  No

**Rate Information**

All rates need to be entered as a **MONTHLY** amount, regardless of how often the premiums are deducted. You will indicate deduction frequencies separately.

**Medical Rates**

Employee Only	Employee + Spouse	Employee + Children	Family
<input type="text" value="100.00"/>	<input type="text" value="200.00"/>	<input type="text" value="300.00"/>	<input type="text" value="400.00"/>

**Vision Rates**

Only enter rates here if the Vision premiums are *optional* to add to the Medical plan.  
**Do not** enter rates here if the Vision premiums are already included in the Medical premiums.

Employee Only	Employee + Spouse	Employee + Children	Family
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

**Create the Plan Summary**

Does this plan have coverage for out-of-network providers?  Yes  No

**Deductibles: In-Network**

Individual	Family
<input type="text" value="\$1,500.00"/>	<input type="text" value="\$5,000.00"/>

**Maximum Out-of-Pocket: Network Providers**

Individual	Family
<input type="text" value="\$7,500.00"/>	<input type="text" value="\$12,500.00"/>

In these screenshots, you are able to build the first custom Medical plan. The platform allows you to build up to 3 different plans. You can upload PDF documents, like the Plan Summary and Network / Provider Directory so that the Employees can access them for viewing and downloading.

**Links and Uploads**

You have the option to display links to websites or links to PDF files for the benefits available. Please indicate below what you would like to display.

A few things about file uploads:

1. The label next to each file upload button tells you what type of file to upload there. (i.e. Plan Summary)
2. Each file is limited to 5 MB in size.
3. The name of the file will display as the link, so be sure to name the files something you want shown on the site.

Do you want to include links (URL's) or PDF files to display for this plan?  Yes  No

Plan Summary

PDF  No file chosen

Rx Guide

PDF  No file chosen

Network/Provider Directory

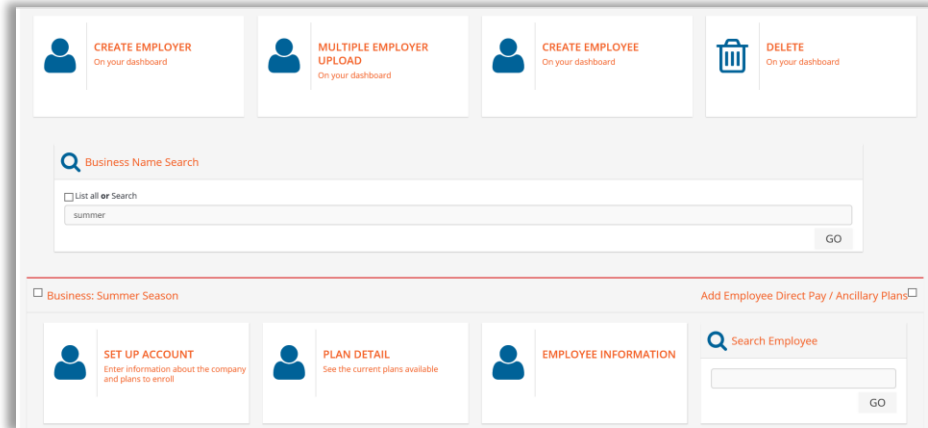
PDF  No file chosen

Do you want to save this plan to use for other groups?  Yes  No

The user would simply fill out the form displayed above. The form captures all the necessary information such as what Employee types are eligible for the plan being built, when Employees are eligible to enroll, whether or not the Employer is contributing to the plan, open enrollment dates, renewal date, PDF's or video links and allows the user to custom create all benefit options for the plan. Depending on the plans type being created, customization options will vary.

# Setting Up A New Employee

Click **CREATE EMPLOYEE**:

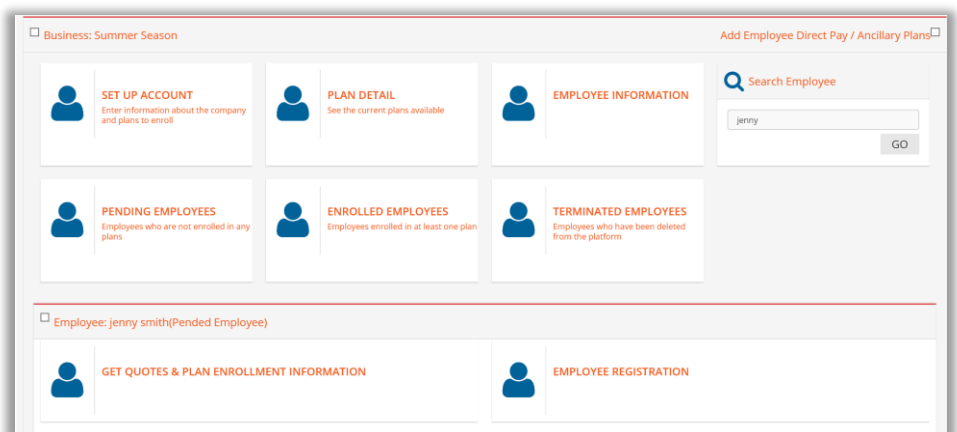
A screenshot of the 'Employee Registration' form. The form is divided into two main sections: 'Employee Information' and 'Registration Details'. The 'Employee Information' section includes fields for 'Employment status?' (Full Time), 'Date of hire?' (11/18/2017), 'Date of birth?' (02/18/1985), 'Payroll deduction mode?' (Weekly), 'Employee SSN?' (000-00-0000), 'Employee Gender' (Male/Female), 'Employee Zipcode' (28078), and 'Employee County' (MECKLENBURG). The 'Registration Details' section includes fields for 'Employee First Name \*' (Jenny), 'Employee Last Name \*' (Smith), 'Contact Phone' (777-777-7777), 'Username \*' (jennysmith), 'Password \*', 'Confirm Password \*', 'State \*' (North Carolina), 'Email Address \*' (jennysmith@linked.exchange), 'Confirm email Address \*' (jennysmith@linked.exchange), 'Business Name' (Summer Season), and a 'Captcha \*' field with a reCAPTCHA logo. At the bottom, there are 'Register' and 'Cancel' buttons.

The **EMPLOYEE REGISTRATION** page will display.

By completing this form, a new Employee will be connected to any custom Employer group. The Employee will receive a welcome email with their credentials to login, quote and apply for coverage unless this functionality is disabled.

Now that the Employee has been created, the Employee can be viewed by the Broker or Employer to view status, apply for coverage or make edits.


The user can **Search Employee** to retrieve a specific Employee by name. Or, click on **Pending Employees**, **Enrolled Employees** or **Terminated Employees** to see a list of Employees, by specific account.




# The New Employee Dashboard

GROUP ACCOUNT CONTACT	EMPLOYER	STATE	EMPLOYEE ID	EMPLOYEE NAME
Bob Summer	Summer Season ( 17928 )	NC	18246	Arc Rock

**SHOW ENROLLED**  
On your dashboard  
 Medical  Dental

**CLICK FOR PLAN OPTIONS**  
On your dashboard  
 Medical  Dental  Section 125

Carrier Name	Best Health Plan
Plan Effective Date	12-01-2017
Renewal Date	12-01-2018
Plan Name	PPO1000
Plan Type	PPO
Plan Summary	<a href="#">Click Here</a>
RX Guide	<a href="#">Click Here</a>
Network Provider Directory	<a href="#">Click Here</a>
Deductibles In Network Individual	\$1,500.00
Deductibles In Network Family	\$5,000.00
Maximum Out Of Pocket Network Providers Individual	\$7,500.00
Maximum Out Of Pocket Network Providers Family	\$12,500.00
Office Visits In Network Preventive Care	\$10.00

After the Employee is created, they can log in to the platform to see benefit options, quote, apply for coverage and make family status changes. This is an example of what the Employee would see.

By clicking **PLAN INFORMATION** on their dashboard, the Employee has immediate access to plan options and currently enrolled plan information.

If the Employee applies for coverage or makes any changes, the platform automatically uplines this to the Employer, Broker and Administrator!

All changes are documented in the platform audit trail. The user that made the change is documented as well.

# Employee Enrollment / Applying For Coverage

The screenshot displays the 'Employee Enrollment / Applying For Coverage' interface. At the top, there is a user profile icon and a link 'CLICK FOR PLAN OPTIONS On your dashboard'. Below this, there are three radio buttons for plan types: 'Medical', 'Cancer' (which is selected), and 'Disability'. The main content area is a table comparing three plans: Plan C, Plan B, and Plan A. The table lists various attributes such as Carrier, Open Enrollment Start/End dates, Estimated Plan Effective Date, Number of Days Eligible to Enroll, Plan Type, Age Band, Deduction Frequency, Individual Rate, Brochure Link, and Selected Rate. Below the table, there are three buttons: 'EMPLOYEE INFORMATION', 'ENROLL EMPLOYEE', and 'CANCEL'. An 'Enrollment Confirmation' modal is overlaid on the bottom right, showing details for Plan A, including Carrier (National Security Insurance Company), Coverage Type (Individual), Deduction Amount (\$6.53), and Plan Type (ces-cancer). At the bottom of the modal are two buttons: 'RETURN TO ACCOUNT' and 'RETURN TO EMPLOYEE PLAN OPTIONS'.

	Plan C	Plan B	Plan A
Carrier	National Security Insurance Company	National Security Insurance Company	National Security Insurance Company
Open Enrollment Start	05-22-2018	05-22-2018	05-22-2018
Open Enrollment End	06-30-2018	06-30-2018	06-30-2018
Estimated Plan Effective Date	07-01-2018	07-01-2018	07-01-2018
Number of Days Eligible to Enroll	45	45	45
Plan Type	Cancer	Cancer	Cancer
Age Band	17 - 64	17 - 64	17 - 64
Deduction Frequency	semi_monthly	semi_monthly	semi_monthly
Individual Rate	Select \$18.18	Select \$10.90	Select \$6.53
Brochure Link	<a href="#">Click Here</a>	<a href="#">Click Here</a>	<a href="#">Click Here</a>
Selected Rate	Select premium above	Select premium above	Select premium above

	Plan A
Carrier	National Security Insurance Company
Coverage Type	Individual
Deduction Amount	\$6.53
Plan Type	ces-cancer

The Employee, Employer or Broker can enroll or submit applications. (NOTE: Some carriers and/or carrier products do not allow for all levels to make application submissions.)

After deciding on a plan to enroll or apply for, click the **ENROLL EMPLOYEE** button to continue. Some plans require applications to be captured and submitted for carrier approval and some plans are enrolled for guarantee issue. The platform handles all situations to deliver the correct enrollment process.

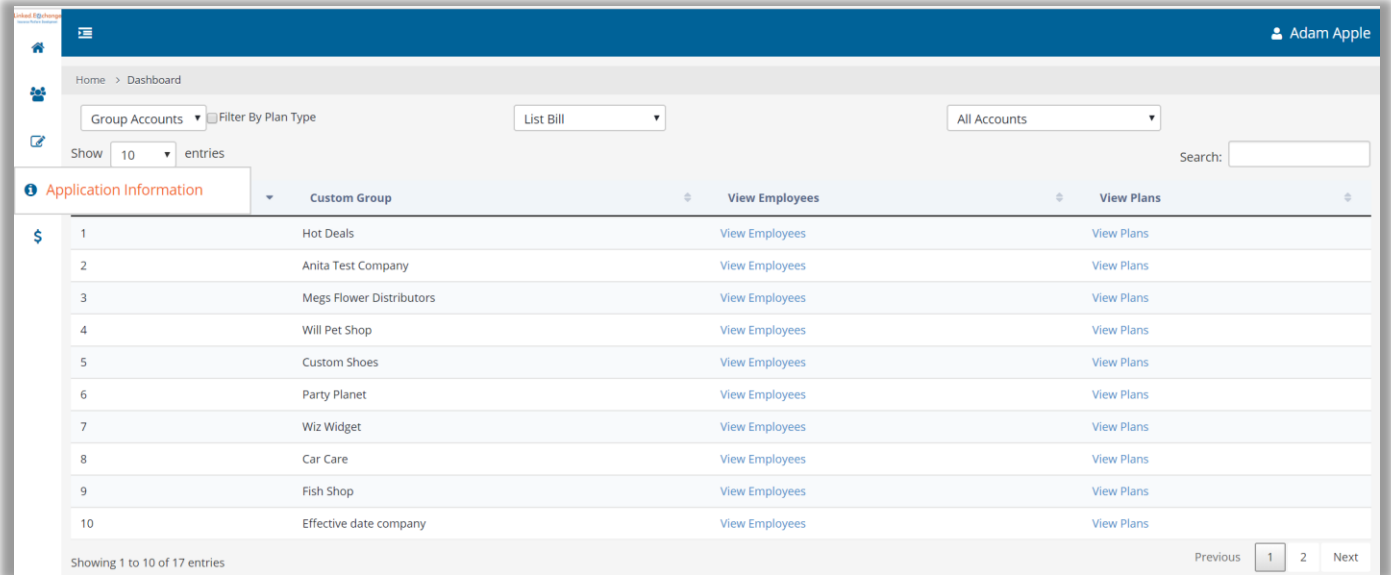
The platform requires each Employee have a completed Employee profile that captures all current information about the Employee to ensure proper rating and application submissions. If the Employee information not completed, the system will not stop the application submission process until this form is complete.

After an enrollment application is submitted a confirmation page will display confirming completion.

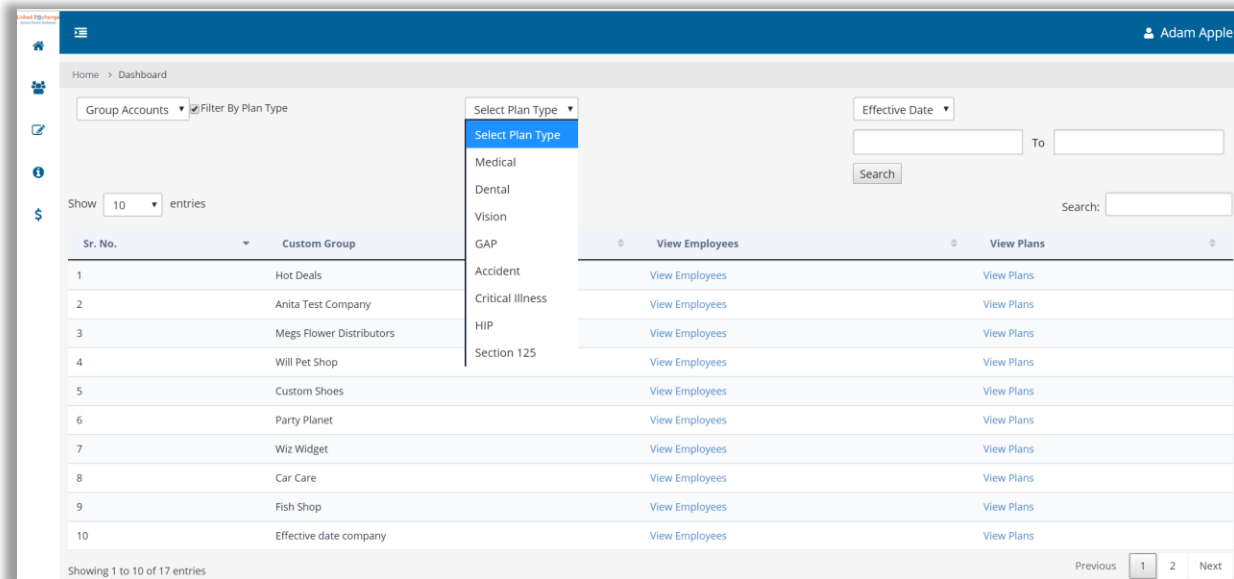
# Accessing Application Submission & Payment Information

The platform will track all application submissions, conversions, PDF applications, open enrollments, renewals by product and/or carrier and payments. The Employer, Broker or Administrator level can access the audit trail information on Employees to see or make changes to enrollments, address, family status or other enrollment related information. (Note: These services are not available on all subscription levels.)

Select **Application Information** on your Broker dashboard menu to access custom group client information:



- Quickly access and filter enrolled, pending and terminated Employee information.
- Click **View Employees** to view all Employees that are associated with a group for both benefitted and non-benefitted Employees
- Click **View Plans** to view all plans a custom group offers!



Never miss another open enrollment!

Manage account enrollments by using customized search filters for plan type, effective date or renewal date.

# Payment Information & Processing Module

Home > Dashboard

Group Accounts      Display All

Show 10 entries      CSV    Excel    Print      Search:

	Business Name	Member ID	Employee Name	Carrier	Plan Name	Plan Type	Coverage Type	Effective Date	Premium	Due Date	Paid Date	Actions
1	Summer Season	17944	Brad Pope		HMO2000	HMO	employee_spouse_rate_ded	02-01-2018	\$28.85	02-01-2018	Update 05-04-2018	Select
2	Summer Season	17929	Doug Fix		HMO2000	HMO	employee_spouse_rate_ded	02-01-2018	\$28.85	02-01-2018	Update 06-10-2018	Select
3	Summer Season	17944	Brad Pope		HMO2000	HMO	employee_spouse_rate_ded	02-01-2018	\$28.85	03-01-2018	Update 05-04-2018	Select

The **Payment Processing** module allows the Employer, Broker or Administrator to access and track or automate the invoice remittance process.

This module allows the user to manually track invoice payments to providers, late payments and update Employee information such as address, phone, email, family status changes and notes for Employees.

The system can track both custom group and individual direct plan sales. The system can be customized to connect to merchant billing accounts for users that wish to fully automate their billing and reconciliation process.

# Technical Support and Troubleshooting

## Support - Main Menu

 <p><b>FAQ's</b></p>	 <p><b>Knowledge Base</b></p> <p>Displays a list of detailed articles that can contain attachments, support user comments and user ratings. These can be organised by product and category.</p>	 <p><b>New Support Ticket</b></p> <p>Click New Support Ticket Above To Submit A Support Ticket To Our Team If You Need Help Using LinkedAgency.</p>
 <p><b>View Support Tickets</b></p> <p>Click View Support Tickets Above To Review Your Support Ticket Submissions.</p>	 <p><b>Announcements</b></p> <p>View a list of recent announcements/news items organised by date</p>	

The **Support** area of the platform offers you access to a few different ways to get help.

**NOTE:** We can modify the support categories to support an agencies sales and customer/Employee support. (A fee will be charged for the development time required for the modification.)

**FAQ's:** You can click here to find answers to many questions related to navigating the site.

**Knowledge Base:** Technical documents with instructions from how to set up your platform to enrolling ACA plans as well as setting up SHOP enrollments.

**Support Ticket:** You can submit and track the responses to your support tickets so that you get a resolution fast.

This is a **Support Ticket**. You can tag a priority level, send us a detailed message and even include any attachments that will help us help you.

## Support - New Support Ticket

Open New Ticket | Open (0) | Awaiting User (0) | Follow Up (0) | Other ▾

### Message Details

Priority:

Subject:

**Rich Text Editor:** B I U X X | [List Icons] | [Link Icons] | [Media Icons]

**Upload File (Max 100 MB)**

Browse... No file selected.