



BerniePortal

July 2018 Release Notes

Two areas of improvement:

1 Agency Plan Import

- a. Agencies can now import Plan Libraries maintained by insurance companies.
- b. Allstate Benefits, MetLife, and InfoArmor are currently maintaining Plans in their Libraries ready to be imported.
- c. Makes it a lot easier for you to offer a seamless experience for your employer clients.

2 Custom Option Fields

- a. You can now make custom checkboxes in your Carrier Forms area.
- b. You would use this if a carrier form asks for a checkmark for something other than a benefit election (BerniePortal has had checkmarks for benefits elections for a long time). You can now make it so that the employee is asked the question such that their answer is expressed on the carrier form as a checkmark rather than as a word.
- c. Example: What is your gender? Employee is given the choices male and female. He chooses male. On the carrier form, a checkmark appears in the "male" box.

Missed last month's updates?

[Click here to see BerniePortal June 2018 Release Notes](#)