

# Ambetter BrokerOffice Quick Guide

Quick Overview of How to Use the Ambetter Enrollment Portal

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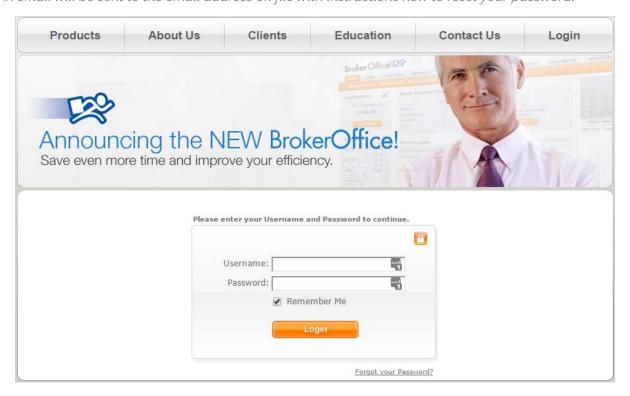
## Logging Into Ambetter BrokerOffice

#### Logging In

- Login to BrokerOffice using "User Name" and "Password"
- Click the "Login" button

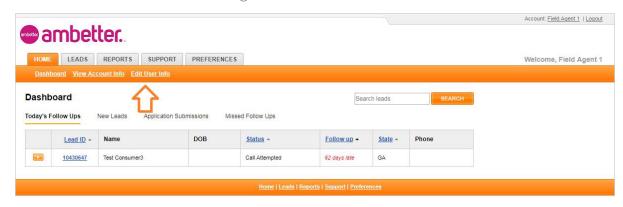
  Note: If password reset is needed, select the "Forgot your Password?" link and enter your username.

  An email will be sent to the email address on file with instructions how to reset your password.



### **Updating Agent Information** (including FFM ID)

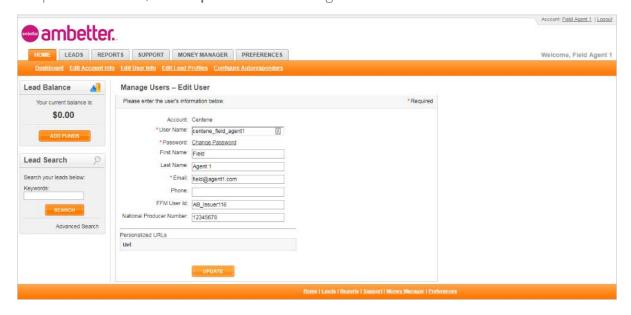
• Select "Edit User Info" link in the orange bar



• Select "Edit"



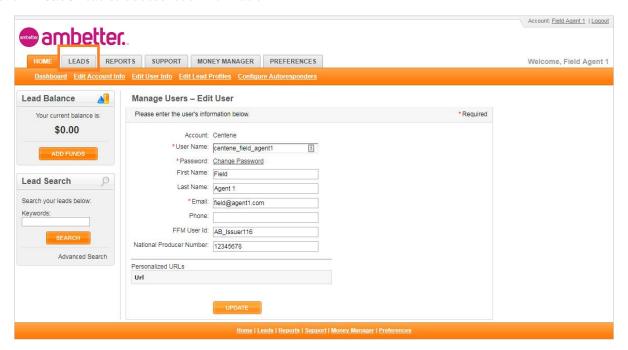
- You can then edit any of the below information:
  - User Name
  - Password
  - First/Last Name
  - Email
  - Phone Number
  - FFM User ID
  - NPN
- Once updates are made, click "Update" to save changes



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Quoting/Enrollment: Existing Member

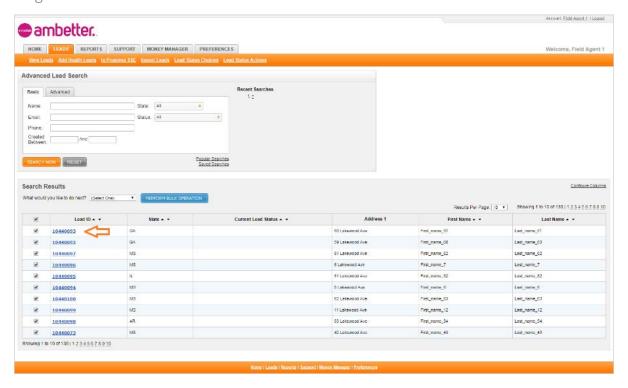
• Click "Leads" tab to access lead information



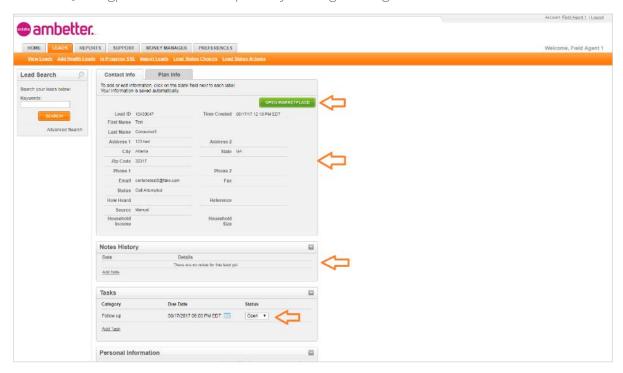
• You can search for all of your leads by clicking the **"Search"** button in the lead search box on the left side of the screen



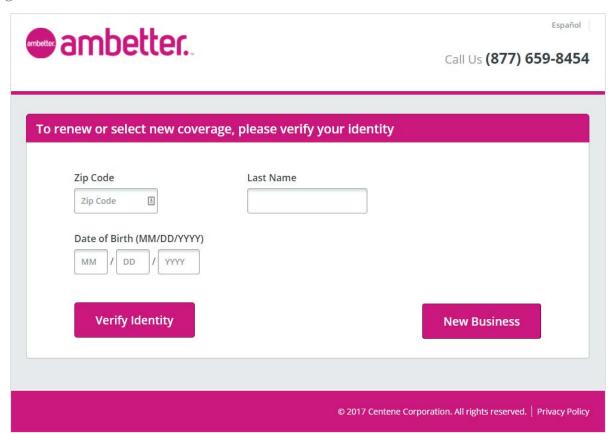
• You will then be taken to the "Advanced Lead Search" screen, where you can enter the lead's page by clicking the link in the "Lead ID" column



• Launch the Quoting/Enrollment Marketplace by clicking on the green "OPEN MARKETPLACE" button

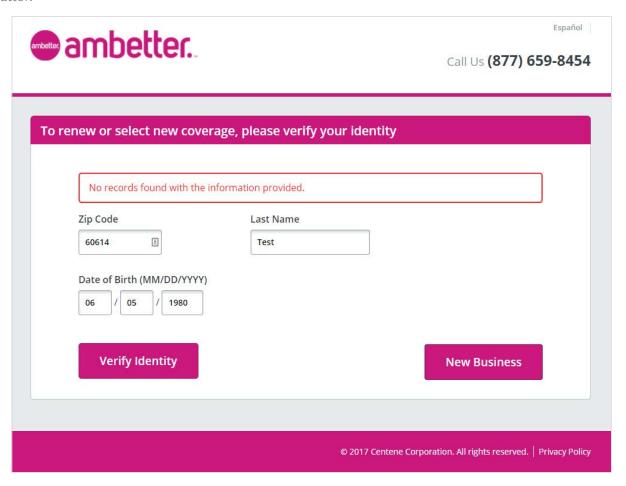


• Once you launch the Quoting/Enrollment Marketplace from Ambetter BrokerOffice, you will be taken to the page below:



- To quote/enroll an existing member (aka "Renewal"), enter the member's zip code, last name, and date of birth
- Click "Verify Identity"

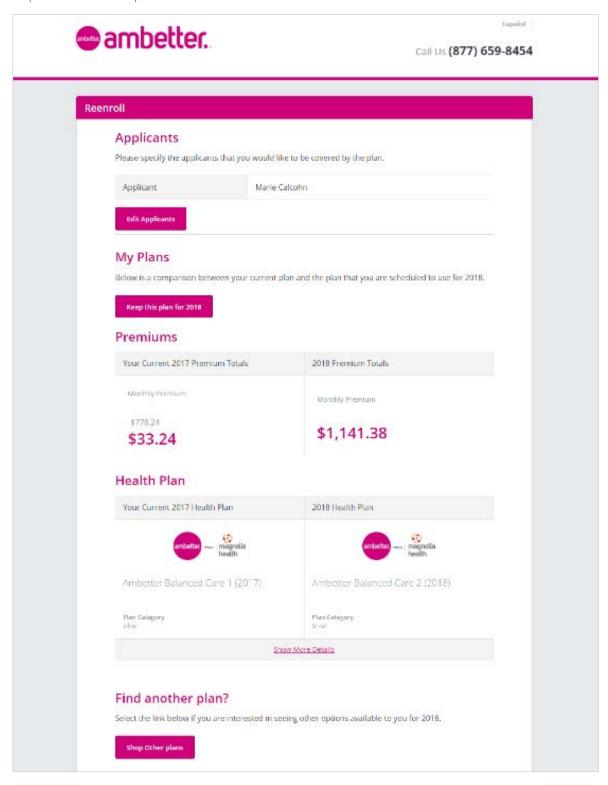
Note: If a record cannot be found using the information entered, you will receive an error message at the top of the screen. At any point, you may advance to quote the consumer by clicking the "New Business" button



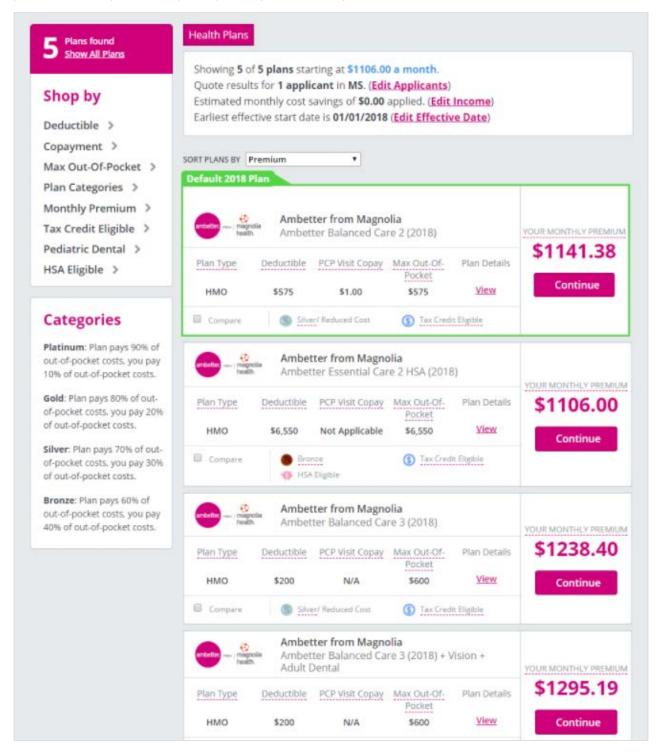
- Once the member is verified, you will be prompted to enter information needed to estimate the 2018 subsidy Note: The estimated savings are not final. The actual subsidy amount will be determined after the application is submitted to the FFM.
- Once entered, click "Continue"



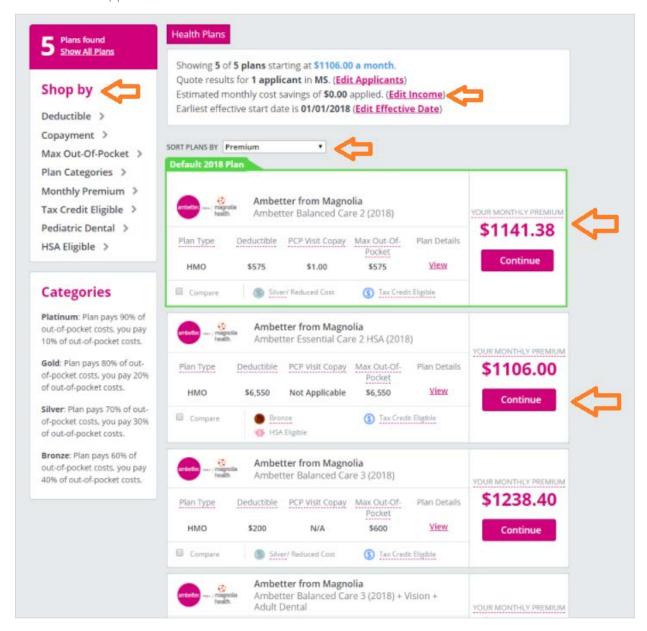
- You will then be taken to the "Plan Renewal" page where you will be able to take the following actions:
  - 1. Edit applicants on the plan
  - 2. Compare current 2017 plan to recommended 2018 plan
  - 3. Select to keep current plan for 2018
  - 4. Shop other available plans



• Select "Keep Current Plan for 2018" to proceed straight to enrollment, or "Shop Other Plans" to proceed to compare other plan options (shown below)



- If the applicant's subsidy eligibility information needs to be revised, you can do so by clicking by clicking the "Edit Income" link
- Plans can be sorted using the **"Sort Plans By"** dropdown menu which appears right above the first available plan to select from
- Plans can also by filtered using the options available in the "Shop by" menu on the left side of the screen.
- 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.
- To select a plan, click "Continue" next to the plan desired to move to the "Shopping Cart" page and advance to the application



• You will then be taken to the **"Shopping Cart"** screen where you will be able to start the application via re-direct to the FFM for final subsidy determination. Once this is complete, you will be taken back to the platform to finalize plan selection

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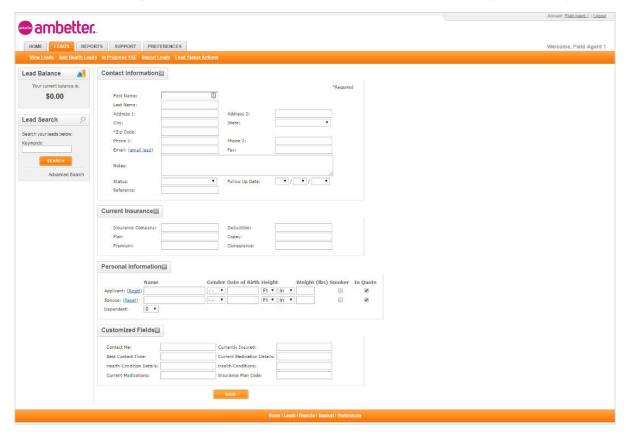
Quoting/Enrollment: New Member

- Click on "Add Health Leads" button from the "Leads" page
- Click the "Leads" tab and then select "Add Leads" from the menu below the tabs

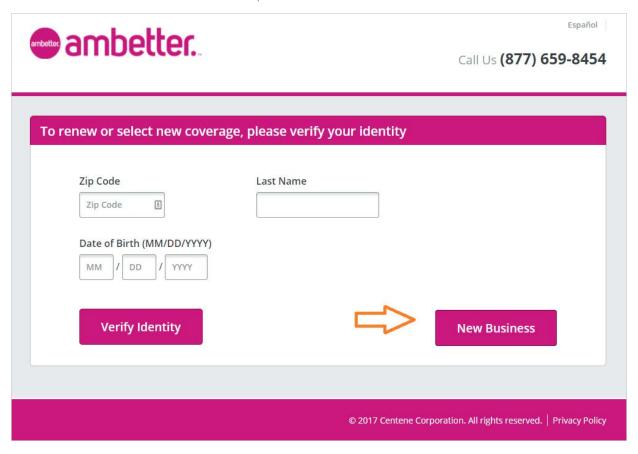


- Enter the information for the lead
- Make sure to enter information in all required fields

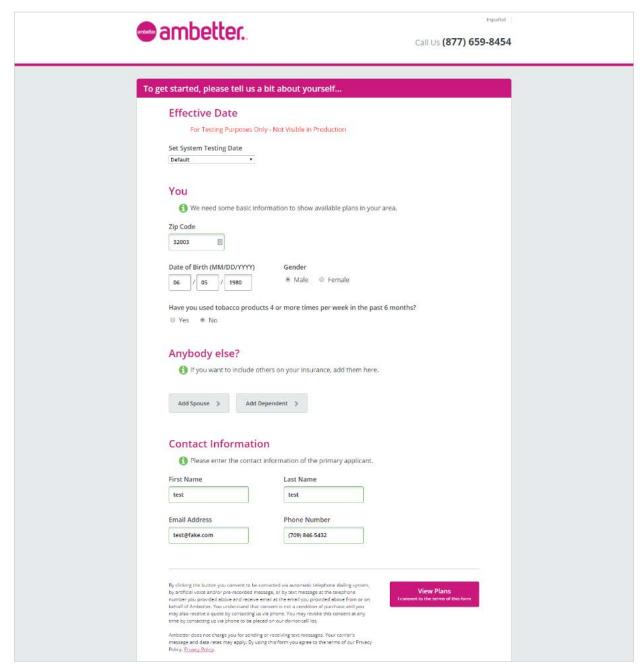
  Note: In order to launch a lead into a Marketplace session to quote and shop for a health plan, an email address and zip code is required
- Click "Save" when complete, them "OPEN MARKETPLACE" to launch the Quote/Enrollment platform



• Click "New Business" to advance to the quotes

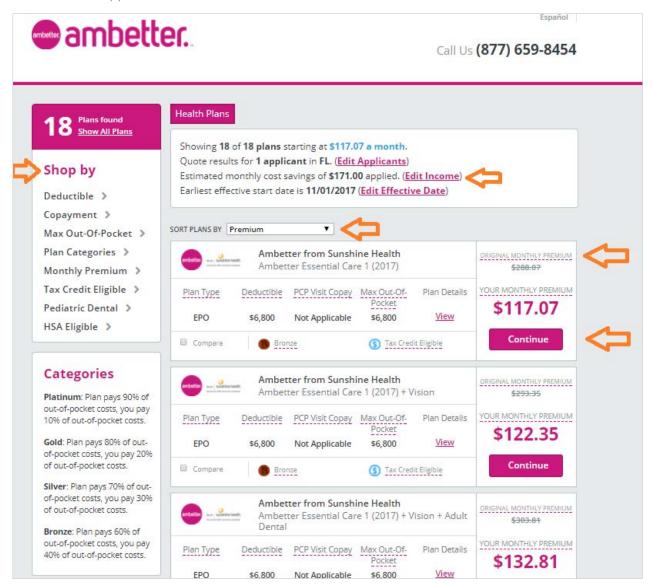


- You will be taken to a page requiring the following information:
  - Enter "Date of Birth" (if not passed from BrokerOffice)
  - Select "Gender"
  - Enter smoking status
  - Click "Continue"
  - If you would like to add a spouse or dependent to the application, click "Add Spouse" or the "Add Dependent" button
  - Once you click "Continue" you will be prompted for the applicant's Contact Information
  - Click "View Plans" to begin shopping



- 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.
- 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 total yearly income
   Note: This income should be inclusive of all members of the household.
   Note: The estimated savings are not final. The actual subsidy amount will be determined after the application is submitted to the FFM.
- To select a plan, click "Continue" next to the plan desired to move to the "Shopping Cart" page and advance to the application



• You will then be taken to the **"Shopping Cart"** screen where you will be able to start the application via re-direct to the FFM for final subsidy determination. Once this is complete, you will be taken back to the platform to finalize plan selection



Ambetter Health www.ambetterhealth.com