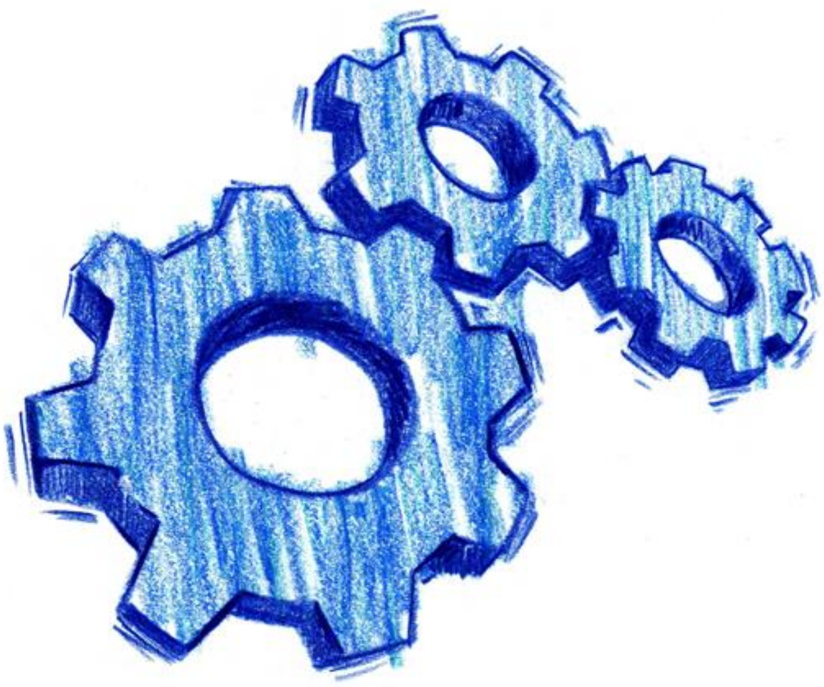
Health Net Broker Portal Overview for California

Individual & Small Business Group



Health Net®

July 2016

Welcome Brokers!

You are a part of Health Net and we want to provide you with tools that help you every step along the way.

Within this presentation, we have compiled useful information about our *Broker Portal* that will support you on your journey within Health Net and help answer any questions you may have. You have user-friendly features at your fingertips that save you time and get the results quickly and conveniently. We know it can be challenging to manage your individual and group accounts, so this should make it simple to use and easy to understand.

Not registered yet? Go to www.healthnet.com/broker, and click on *Register* to set up your secure user account. You can also contact your account executive or Broker Services for assistance.

It's one more way Health Net continues to make doing business with us even easier!

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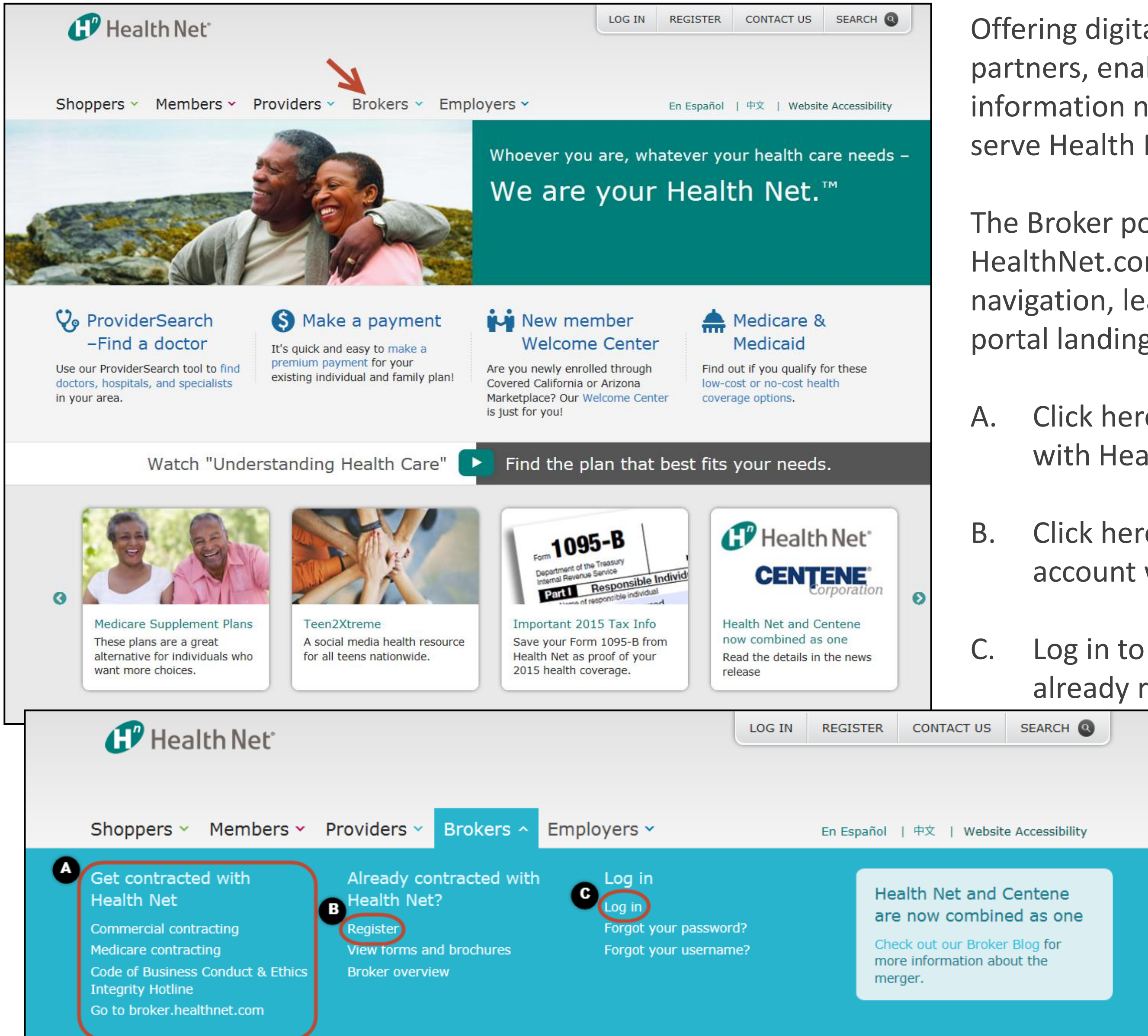
Contracting, Certification and Support

HealthNet.com



Offering digital solutions to you, our broker partners, enabling your ability and find the information needed quickly and better serve Health Net's customers.

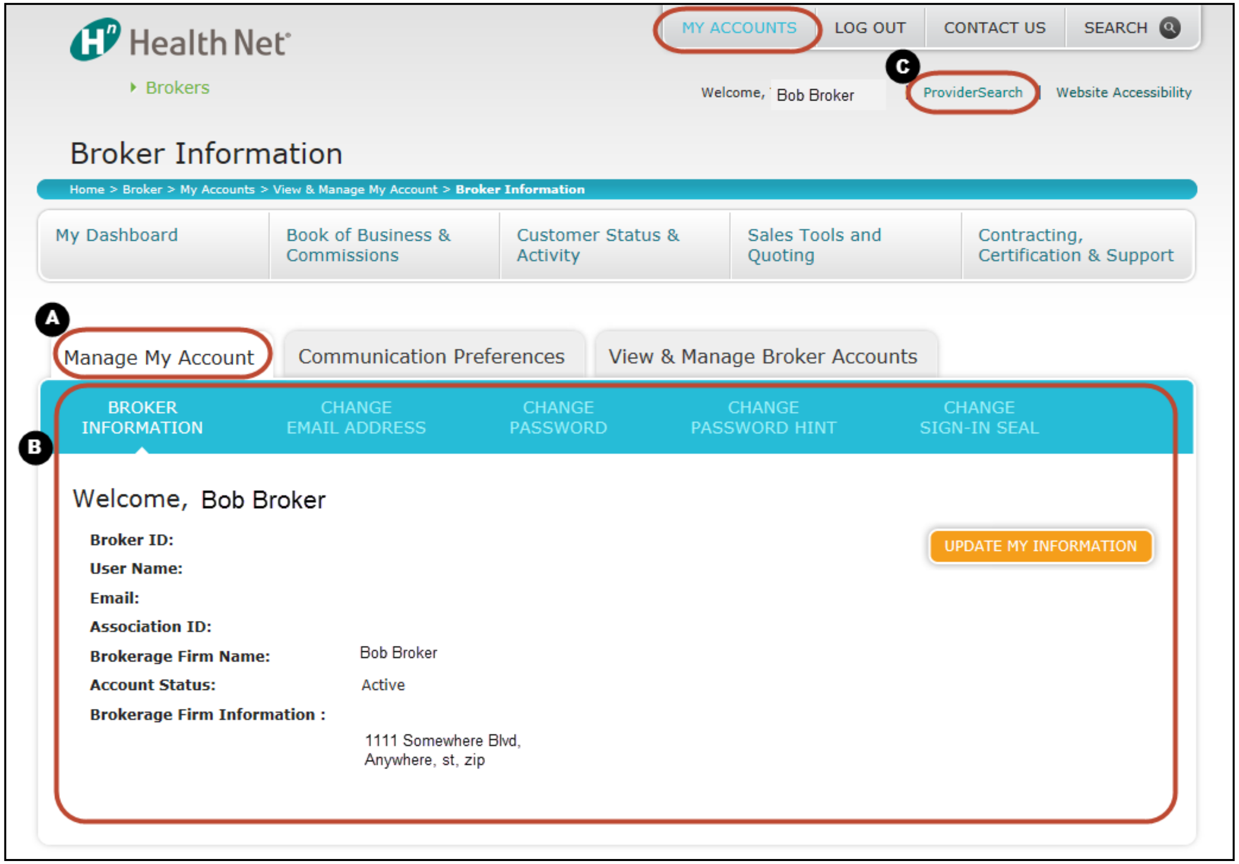
The Broker portal is accessible from the HealthNet.com home page on the top navigation, leading to the pre-login broker portal landing page.

A. Click here if you want to be contracted with Health Net.

B. Click here to register and create your account with us.

C. Log in to the broker portal (if you are already registered with us.)

Account Profile Management – Manage My Account



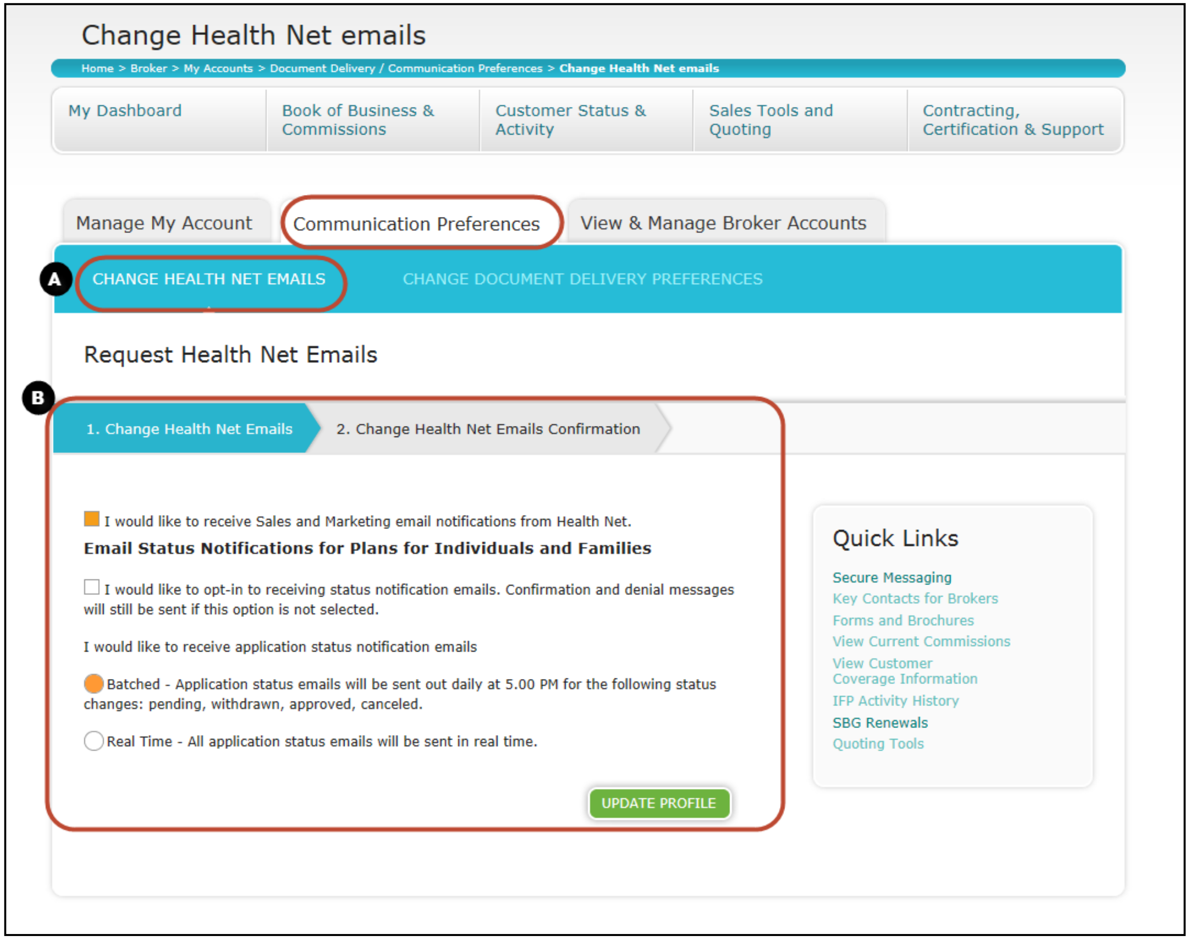
Broker account management profile. Click on *My Accounts* at the top of the page to reach this section:

A. This section provides information to manage your personal account and your broker information. Update personal information, view brokerage firm information, license information and renewal notification updates.

B. Change email address, change password, change password hint, change sign-in seal.

C. Click here to search for providers by location, provider name/ID or plan/network.

Account Profile Management – Communication Preferences: Change Health Net Emails

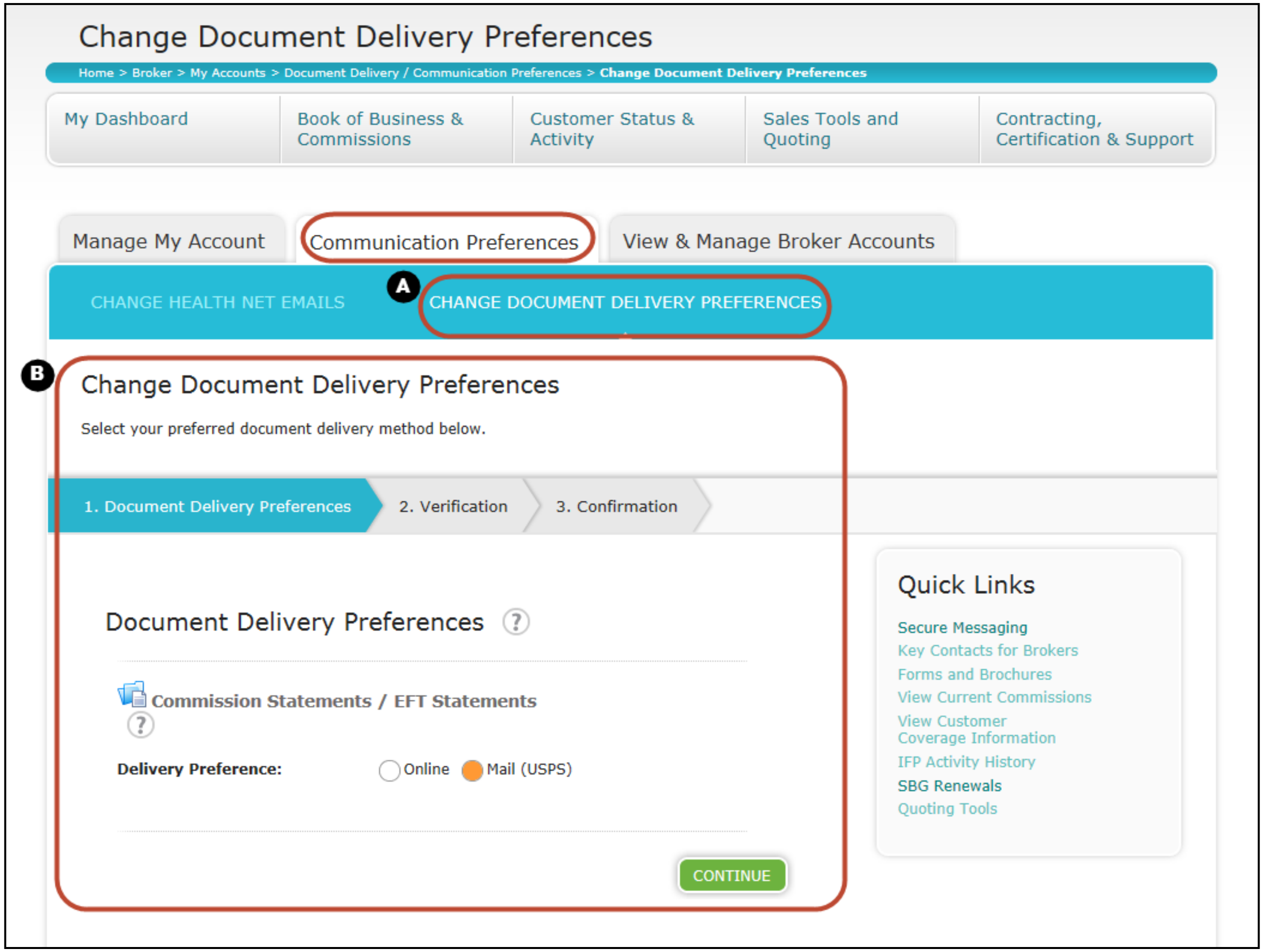


Communication Preferences is the next tab under *My Account where* you are able to:

A. Change Health Net email preferences, request emails and receive status notifications.

B. Opt in or out of Health Net communication. Opt in to batched or real time application status updates.

Account Profile Management – Communication Preferences: Change Document Delivery Preference

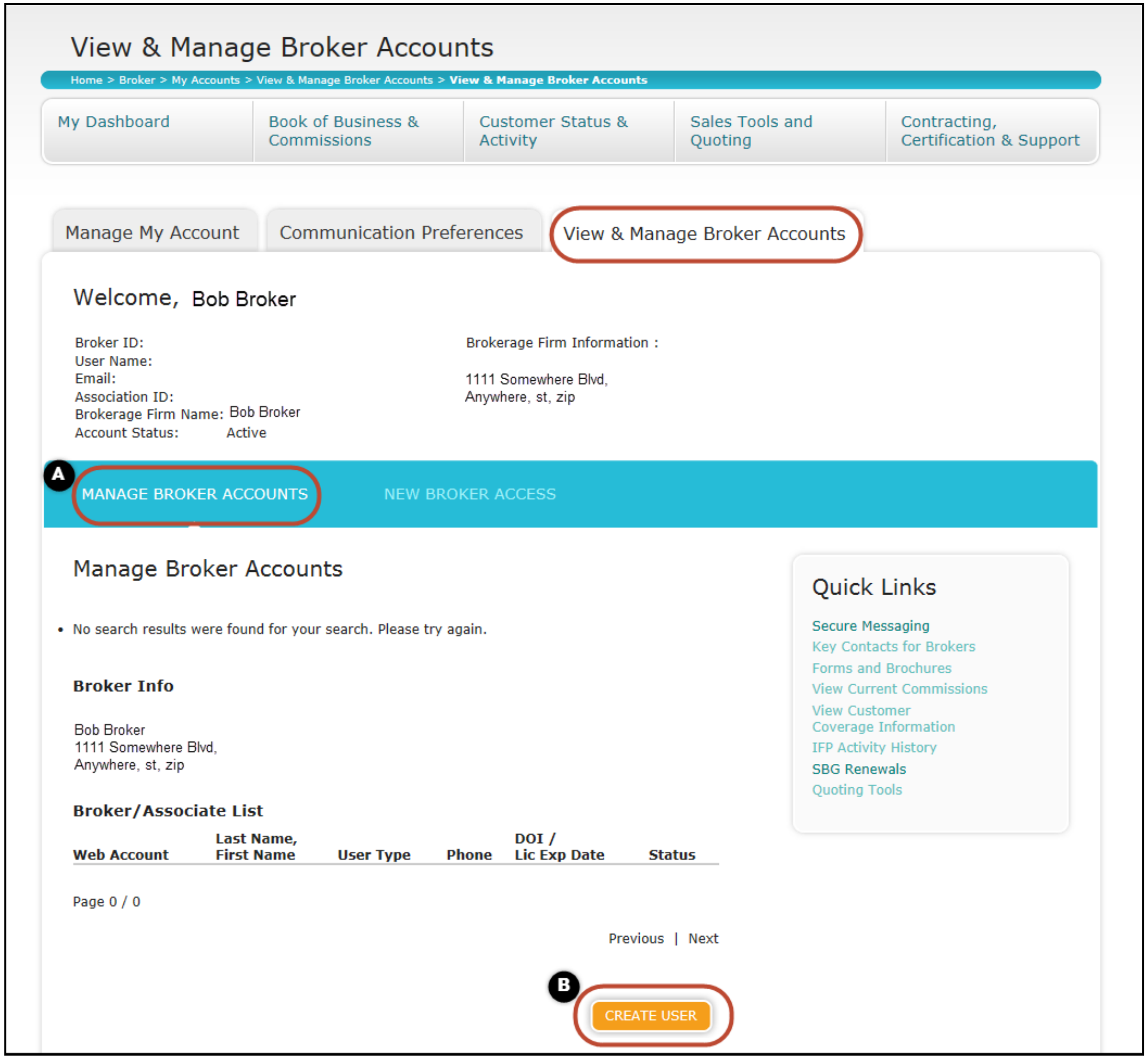


Once again in the *Communication Preferences* tab:

A. You can change your document delivery preferences.

B. Document delivery can be set to online or mail for your commission statements. Make sure to verify and confirm your selection.

Account Profile Management – View & Manage Broker Accounts



View & Manage Broker Accounts is the third tab under My Accounts where brokers can view and manage personal information, broker/ associate list and set up access for new brokers:

A. From *Manage Broker Accounts*, you can create new users, delegate features and disable users on the account.

B. Make sure you click to create a new user at the bottom.

Account Profile Management – View & Manage Broker Accounts *(continued)*

A

Web Account	Last Name, First Name	User Type	Phone	DOI / Lic Exp Date	Status
bbroker		Contracted Broker Associate	999 999 9999		Active
Cbroker		Contracted Broker Associate	999 999 9999		Active
Abroker		Contracted Broker Associate	999 999 9999		Active

Still under Manage Broker Accounts from the previous page, you will see the following after clicking create user:

A. Broker/Associate list information with web account name, username, user type, phone number, license information, and status.

B. Allow/deny features: Click on the web account name to open specified account, and delegate features and access to the user.

C. Delete or disable users on the account then update information.

Manage Broker

Name :
Email :
Status: Enabled

B

Allow	Deny	Role
○	●	New Business Quote & Proposal
○	●	New Business Quote Activity
○	●	Quoting Profile/Underwriting Note: for Broker Associates, this controls the user's access to the Quoting Profile. For GA Associates, this controls the user's access to Underwriting functionality.
○	●	SBG Renewals
○	●	Book of Business
○	●	IFP Activity History
○	●	View BoB Commissions Data Note: granting access to Commissions Data means this Broker will be able to view all Commissions Data for the firm, not just their own.
○	●	Renewal Quote Activity
○	●	51-100 Group New and Renewal Quoting
○	●	View Group Billing & Enrollment

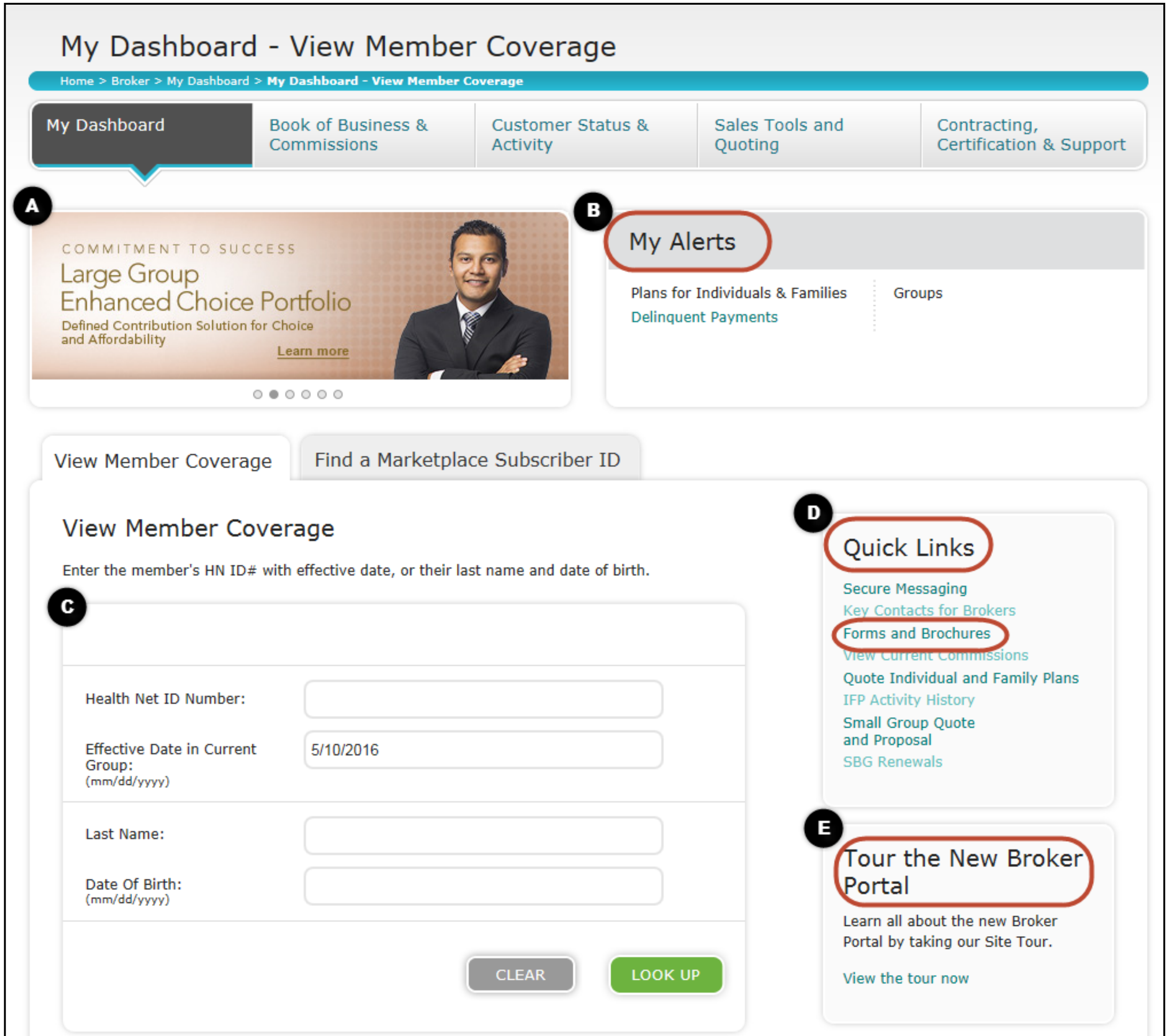
C

☐ **Delete** this user account
☐ **Disable** this user account

BACK UPDATE

Health Net

My Dashboard – View Member Coverage



This is the Dashboard you will always see first after logging in to the broker portal:

A. Rotating broker news carousel

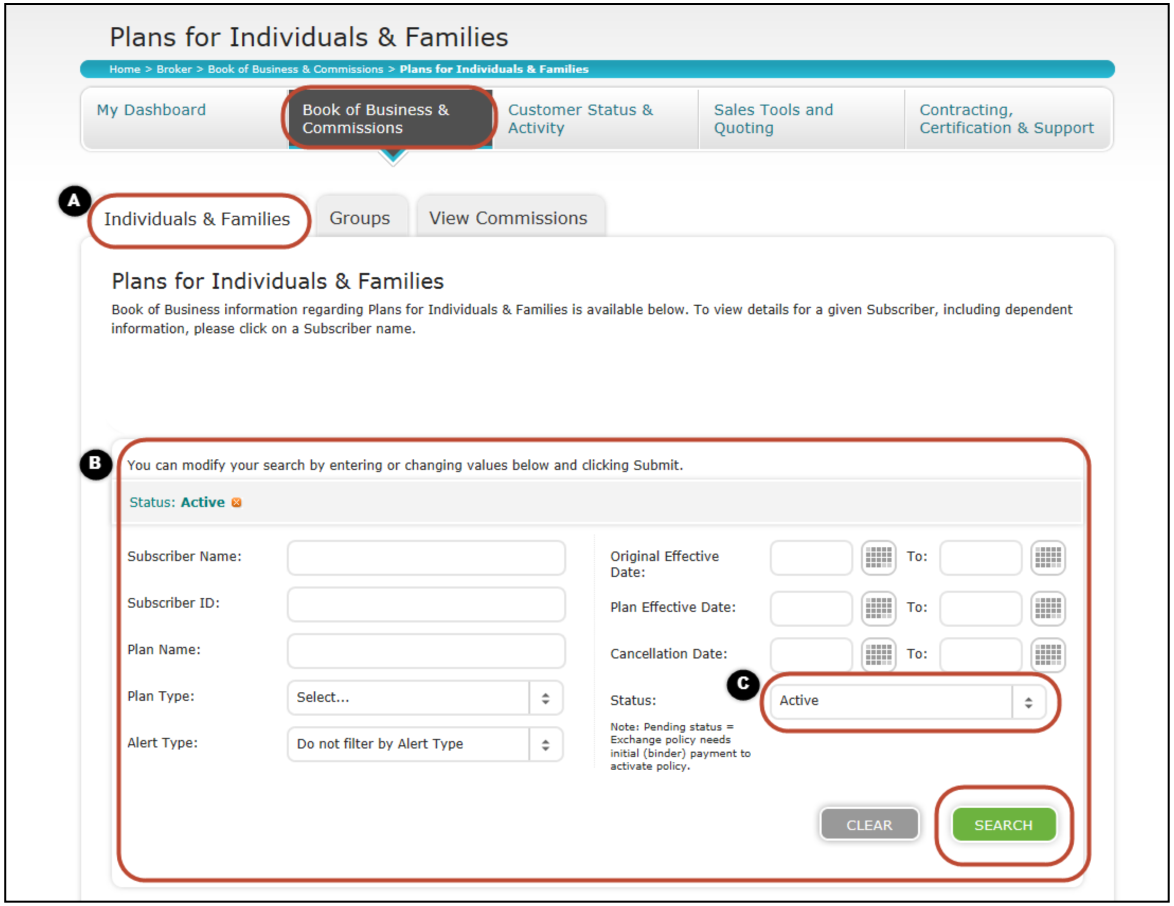
B. Alerts specific to you and your Book of Business

C. Existing and onboarding member lookup capability at your fingertips

D. Quick Links to frequently accessed features including *Forms and Brochures*

E. Portal tour for newly registered brokers

Book of Business – Individuals & Families



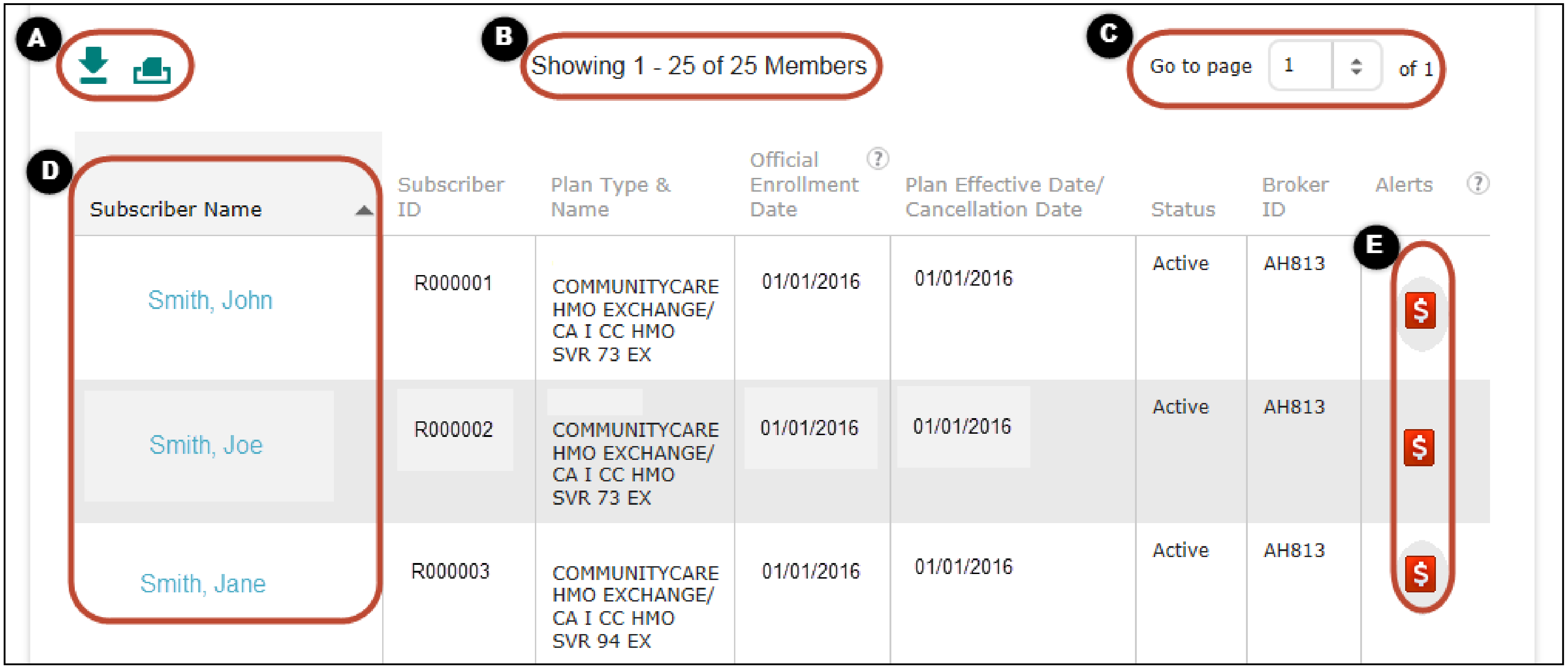
The broker Book of Business tab provides you with a variety of member information at your finger tips:

A. Individual & Families tab:
   - For individuals and family members, on and off exchange, including on-exchange members in a pending status.

B. Filters enable more precise searching capabilities by:
   - Subscriber ID & name
   - Plan & alert type
   - Original effective date
   - Plan effective date
   - Status

C. Status of member:
   - Status auto-defaults to Active.
   - Select status of member by choosing from dropdown list then click *Search*.

Book of Business – Individuals & Families *(continued)*

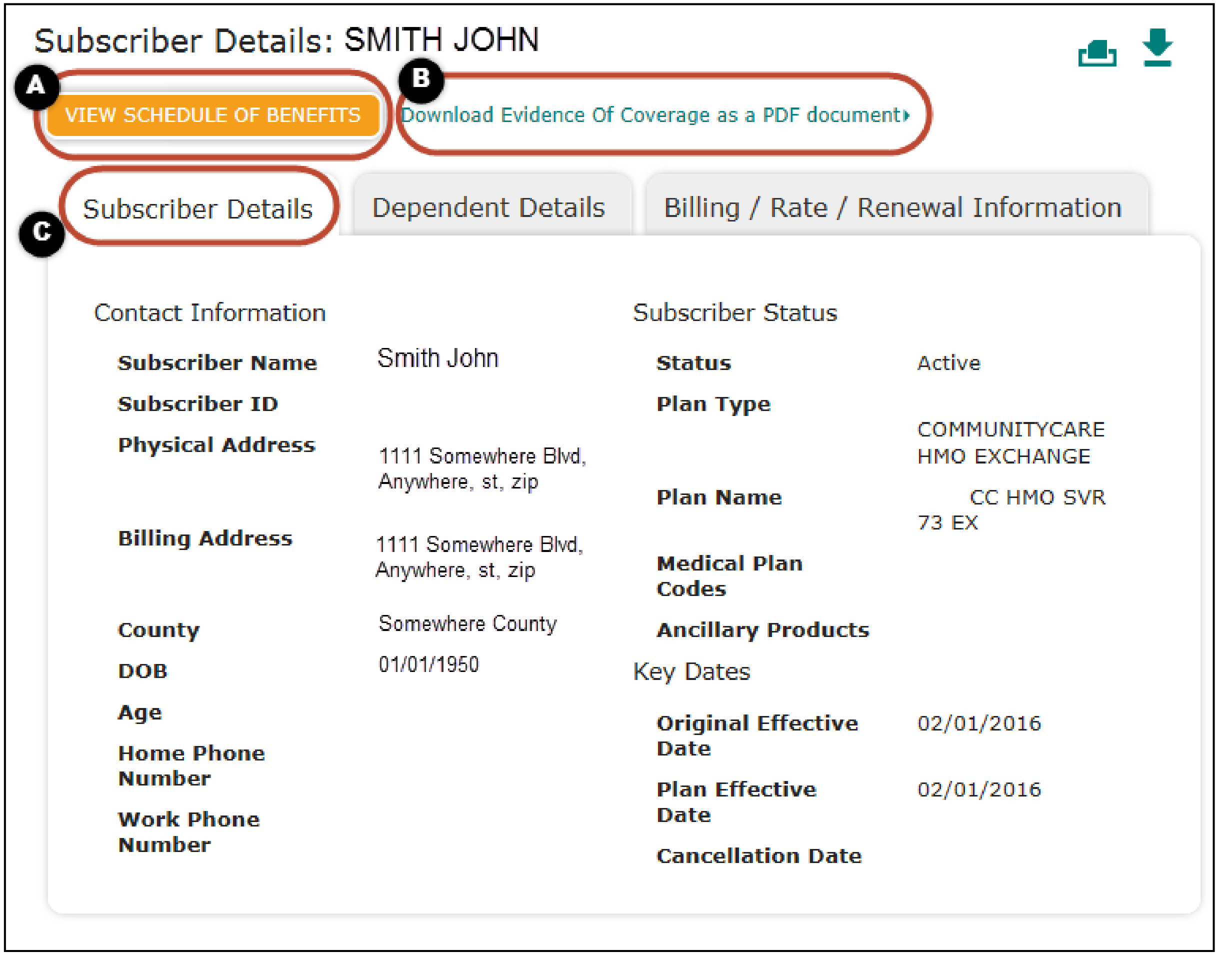


Search results for individuals that can be sorted by columns, downloaded or printed:

A. Download excel file or print results.
B. Show number of members on current page.
C. Jump to a specific page.
D. List of subscriber names.
E. Payment has not been received for past-due bill (to see a full description of icons/alerts, see slide 45).

Note: To find specific information on subscribers, click on the subscriber's name. Details of subscriber will then populate. See next slide.

Book of Business – Individuals & Families: Subscriber Details



Subscriber Details allows you to drill-down to view specific member details:

A. View the Schedule of Benefits for this subscriber based on current plan.

B. Download the available Evidence of Coverage (EOC) in PDF form.

C. Subscriber details such as:
- Subscriber name
- ID
- Address
- Status
- Plan type
- Effective dates
- Physical address
- Billing address
- County of subscriber

Book of Business – Individuals & Families: Dependent Details

Subscriber Details: SMITH JOHN

VIEW SCHEDULE OF BENEFITS   Download Evidence Of Coverage as a PDF document

Subscriber Details | Dependent Details | Billing / Rate / Renewal Information

A

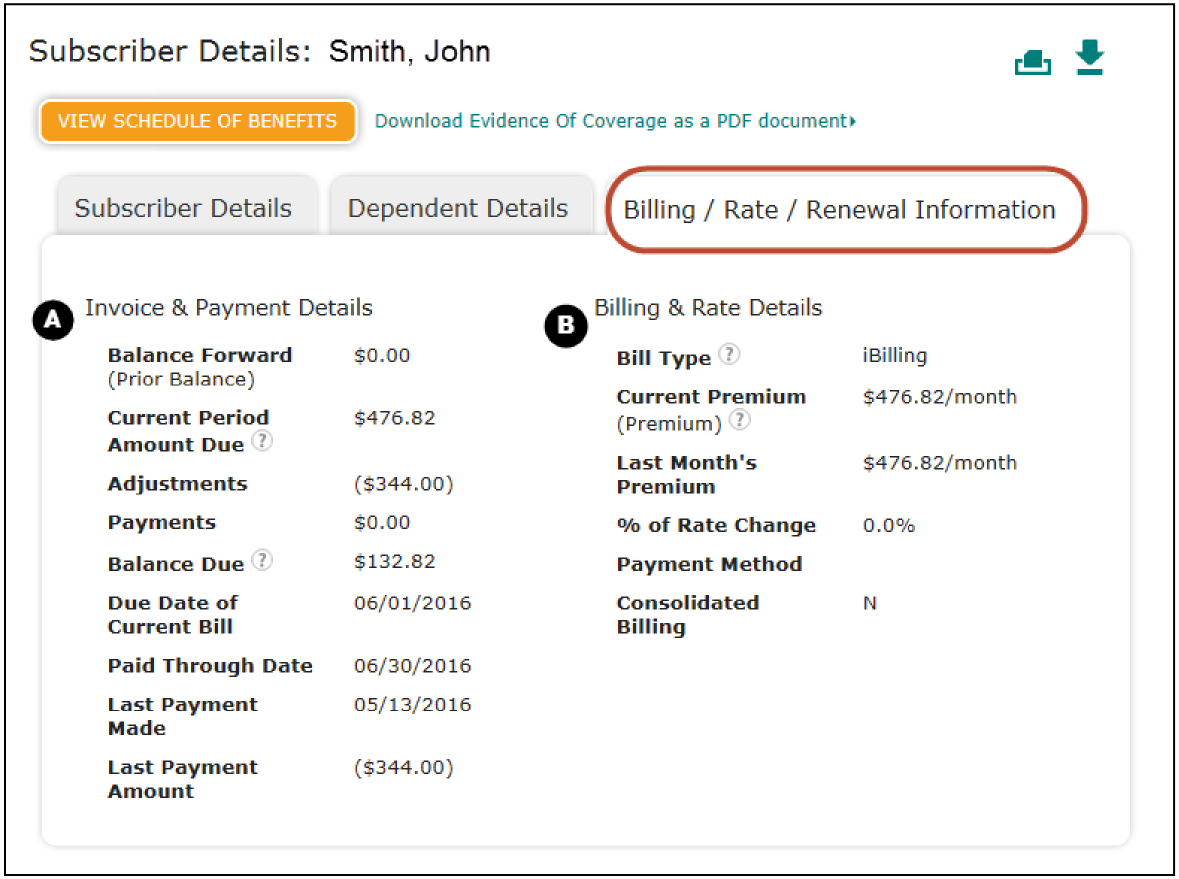
Name	Relation	Physical Address	DOB	Age	Status	Mbr Eff Date	OAD
Smith, Jane		1111 Somewhere Blvd, Anywhere, st, zip	01/01/2000	16	Active	08/01/15	No
Smith, Joe		1111 Somewhere Blvd, Anywhere, st, zip	01/01/2001	15	Active	08/01/15	No
Smith, Jill		1111 Somewhere Blvd, Anywhere, st, zip	01/01/2002	14	Cancelled	08/01/15	No

The Dependent Details tab shows all dependents associated with subscriber.

A. Detailed information regarding the dependent is listed. View the name, relation, age, status, date of birth and effective date. A dependent is defined as:

- Policyholder's legally married spouse or Domestic Partner as defined by law.
- Policyholder's child who is:
  (a) under the age of 26;
  (b) over the age of 26
  - Incapable of self sustaining employment by reason of physical or mental disability incurred prior to attainment of age 26.
  - A person who is chiefly dependent upon the policyholder or policyholder's spouse or domestic partner for support.

Book of Business – Individuals & Families: Billing/Rate/Renewal Information



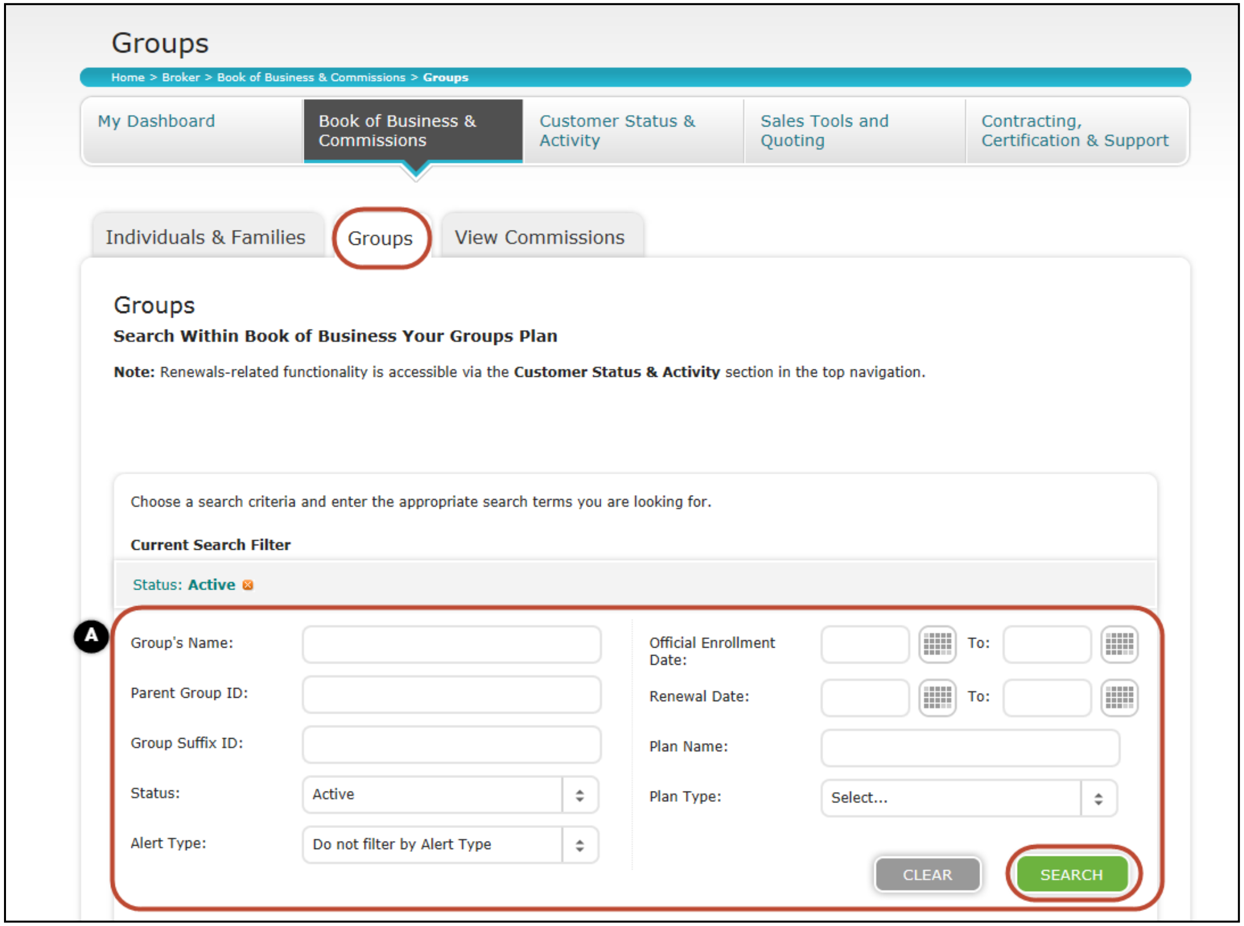
This third tab associated with the specific subscriber is the Billing/Rate/Renewal tab and includes specific member details regarding:

A. Invoice & Payment Details include:
   - Adjustments
   - Due dates
   - Balances
   - Current period amounts
   - Paid-through dates

B. Billing & Rate Details include:
   - Bill type
   - Current and last premium
   - % of rate change
   - Payment method
   - Consolidated billing

Note: Updates from the operating system can be between 1–2 days.

Book of Business – Group Customers



Now switching over to show you the Book of Business tool for your Groups:

A. Use the Current Search Filter for a more precise search. Search employer group customers by:

- Parent group ID
- Group suffix ID
- Status
- Alert type
- Official enrollment date
- Renewal date
- Plan name and plan type

Note: A list of active groups will populate under the search filter without having to enter any search criteria.

Book of Business – Group Customers Results

A | Showing 1 - 6 of 6 Groups B | Go to page 1 of 1 C

Group Name	Parent Group/ Group Suffix ID	Plan Type & Name	Official Enrollment Date	Renewal Date	Status	Broker ID	Alerts
DOMINIC'S (WHOLECARE HMO GOLD $3	AO001A	CA S WC HMO GLD 30 INF	12/01/2015	12/01/2015	Active	AH001	$
DOMINIC'S (SC HMO GOLD 30 + INF	AO001B	SMALL BUSINESS PLANS - NP SMARTCARE/BRONZE CA S SC HMO GLD 30 INF	12/01/2015	12/01/2016	Active	AH002	$
DOMINIC'S (WHOLECARE HMO GOLD $3	AO001C	SBG HMO WHOLECARE CA S WC HMO GLD 30 INF	12/01/2015	12/01/2016	Active	AH003	$
LS: DOMINIC'S (SALUD Y MAS GOLD	AO001D	CA-LATINO SBG SALUD HMO SIMNSA ACCESS CA S SAL HMO GLD 30 INF	12/01/2015	12/01/2016	Active	AH004	$

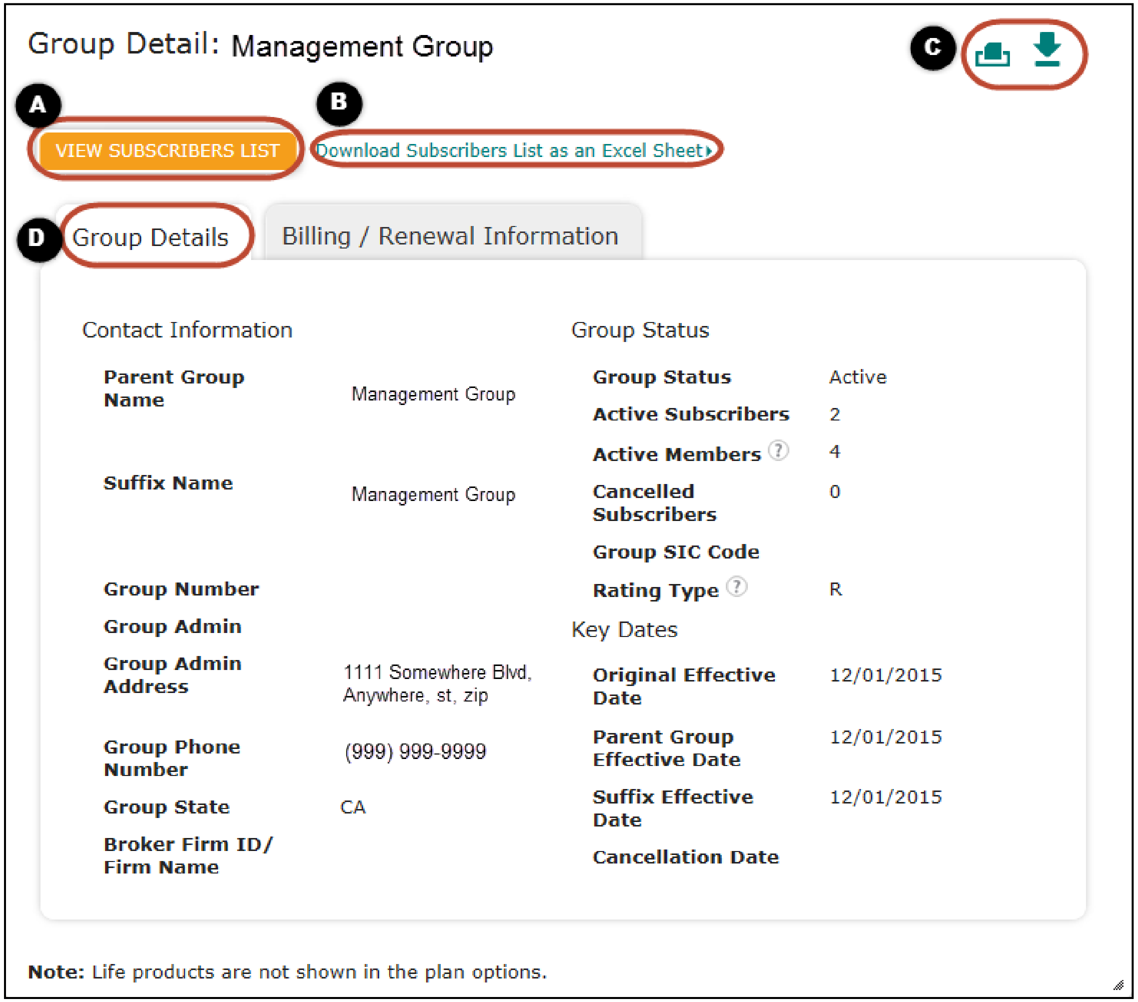
D

Search results for groups that can be downloaded or printed:

A. Download an excel file version or print results.
B. Show number of groups.
C. Jump to a specific page.
D. View an alert noted on the group which can be: group is delinquent, to renew within the next 60 days, group has terminated within the last 60 days, or group rate will increase within the next 60 days.

Note: To see a full description of icons/alerts, see slide 45.

Book of Business – Group Customers: Group Details



Group details, demographic / plan status information and lists:

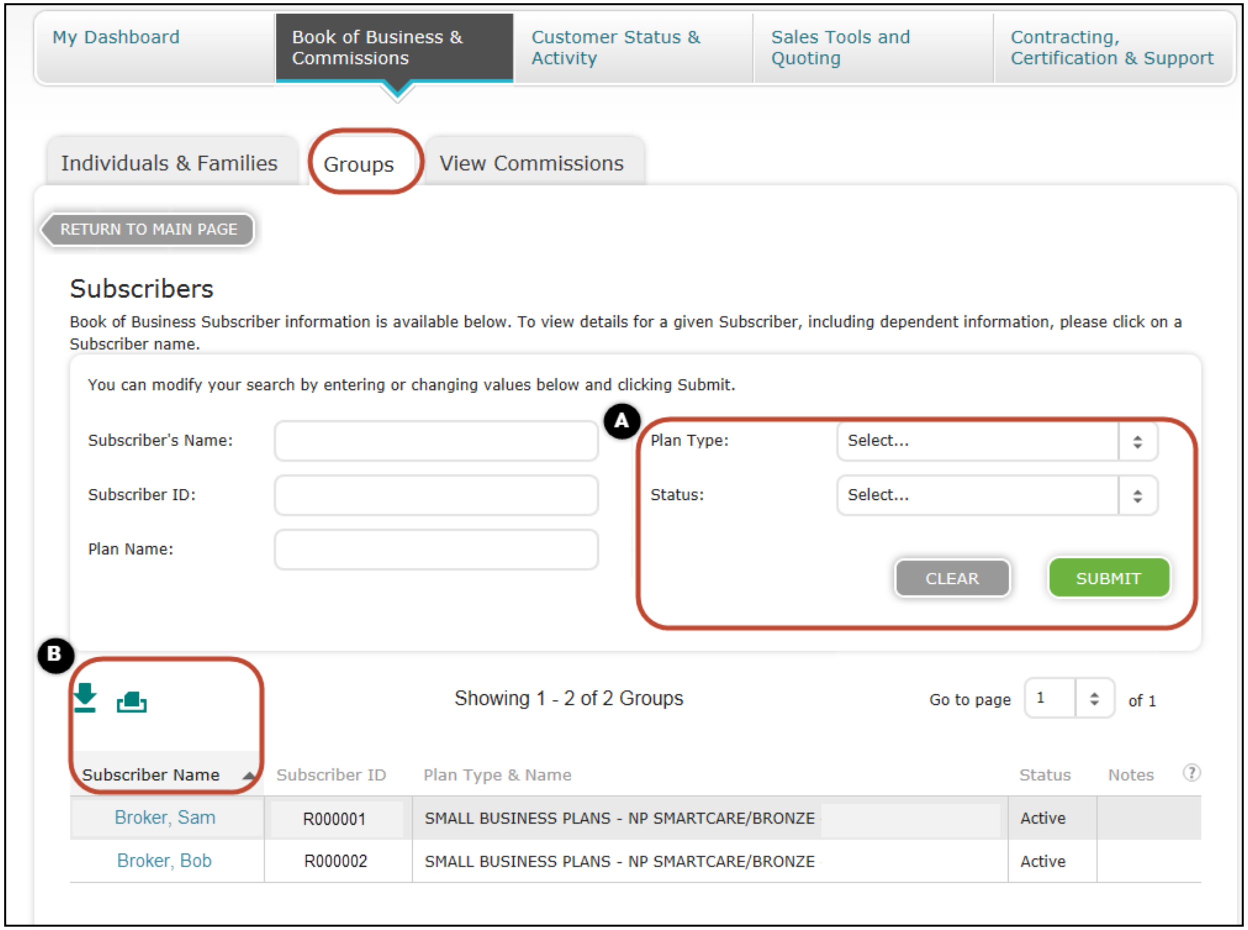
A. Click to view active subscribers.

B. Action to download into excel sheet with option to print list.

C. Print and download subscriber information.

D. Group details include contact information, status of the group/members/ subscribers, and key dates.

Book of Business – Group Customers: Subscribers List

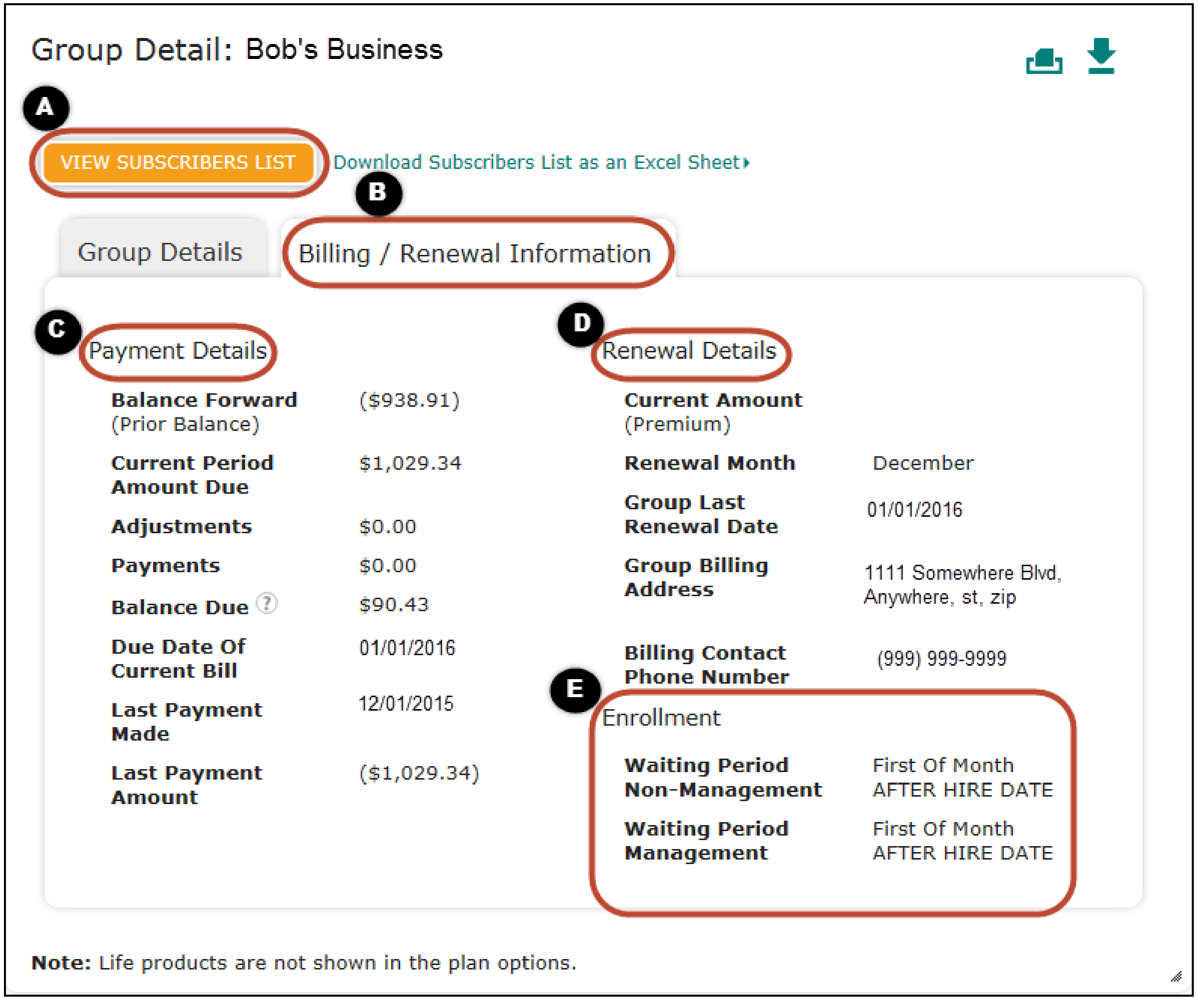


View details about *Subscribers List* as seen on previous slide:

A. Further narrow by applying filters such as plan type or status.

B. Print and download subscriber information.

Book of Business – Group Customers: Billing/Renewal Information



This second tab associated with the specific group is for Billing and Renewal Information:

A. Action to view subscriber list.

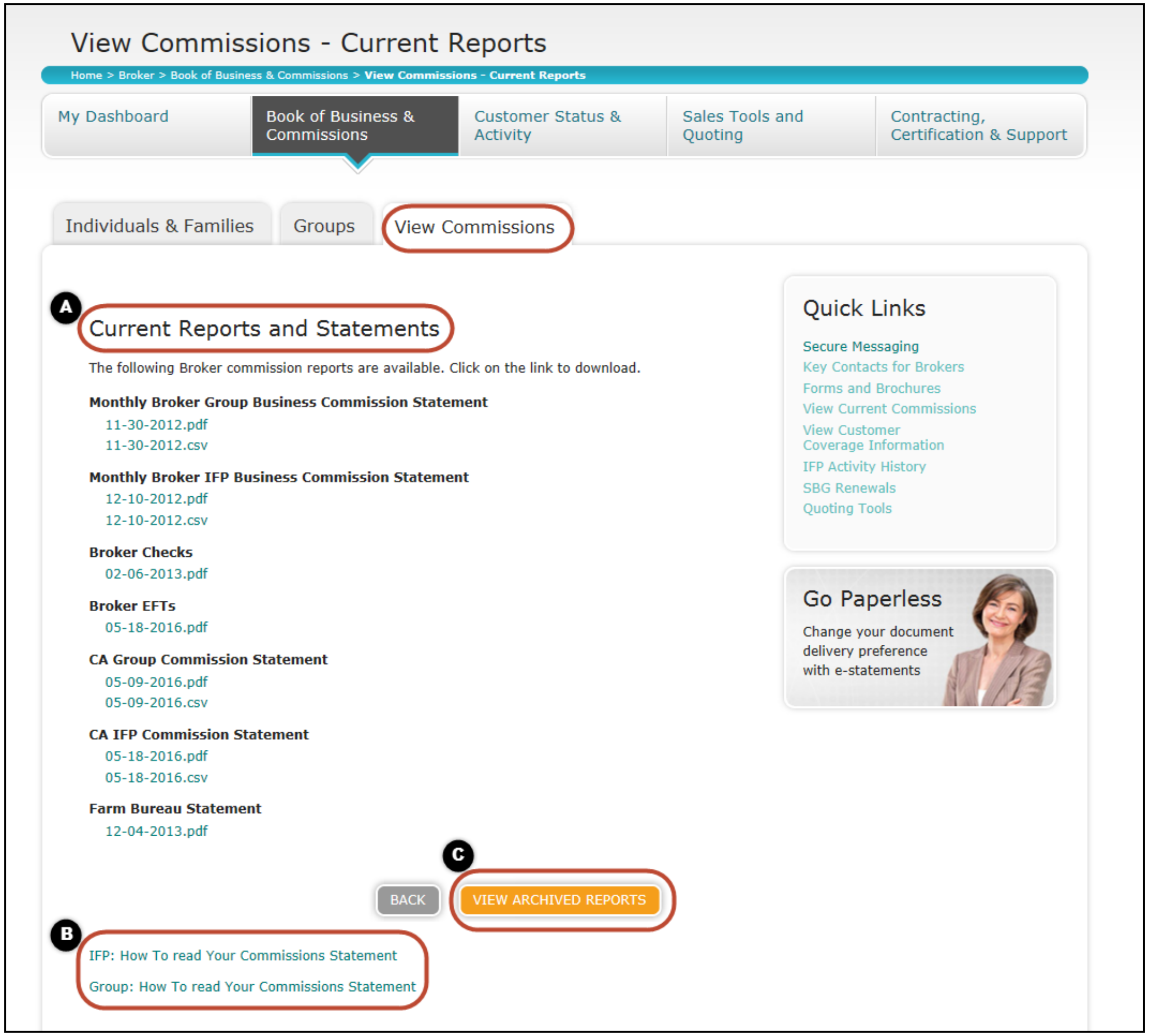
B. Review the billing/payment details and renewal details.

C. Under Payments Details, find the balance forward, payments and adjustment information.

D. Under Renewal Details, find group renewal dates, billing address, contact, and waiting period information.

E. Under Enrollment, find waiting periods.

Book of Business – View Commission Statements: Current Reports and Statements



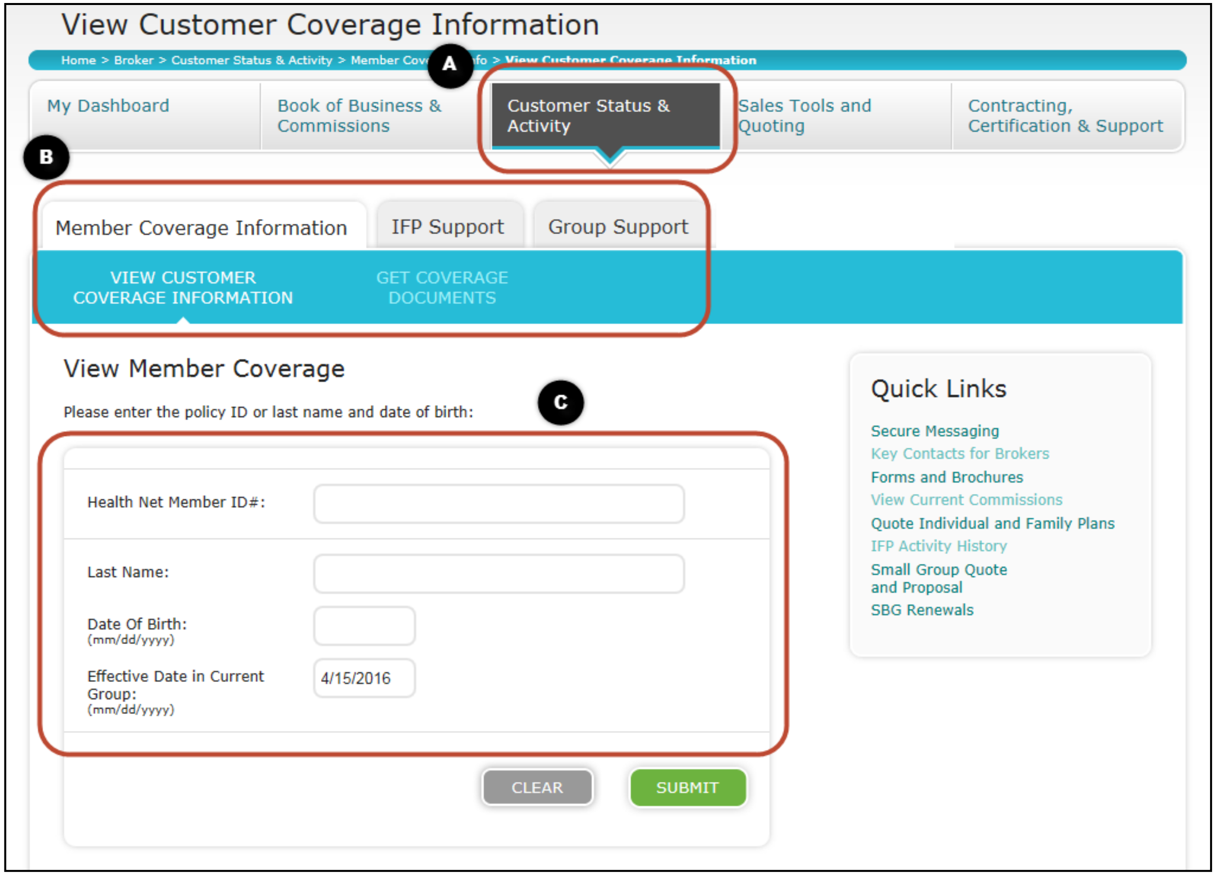
Broker Reports and Commission Statements:

A. Current reports and statements – PDF and CSV forms are listed here.

B. *IFP – How to read your commission statement* link and *Group – How to read your commission statement* link.

C. View historical statements up to 18 months under archived reports.

Customer Status & Activity – View Membership Coverage



Customer eligibility lookup capability:

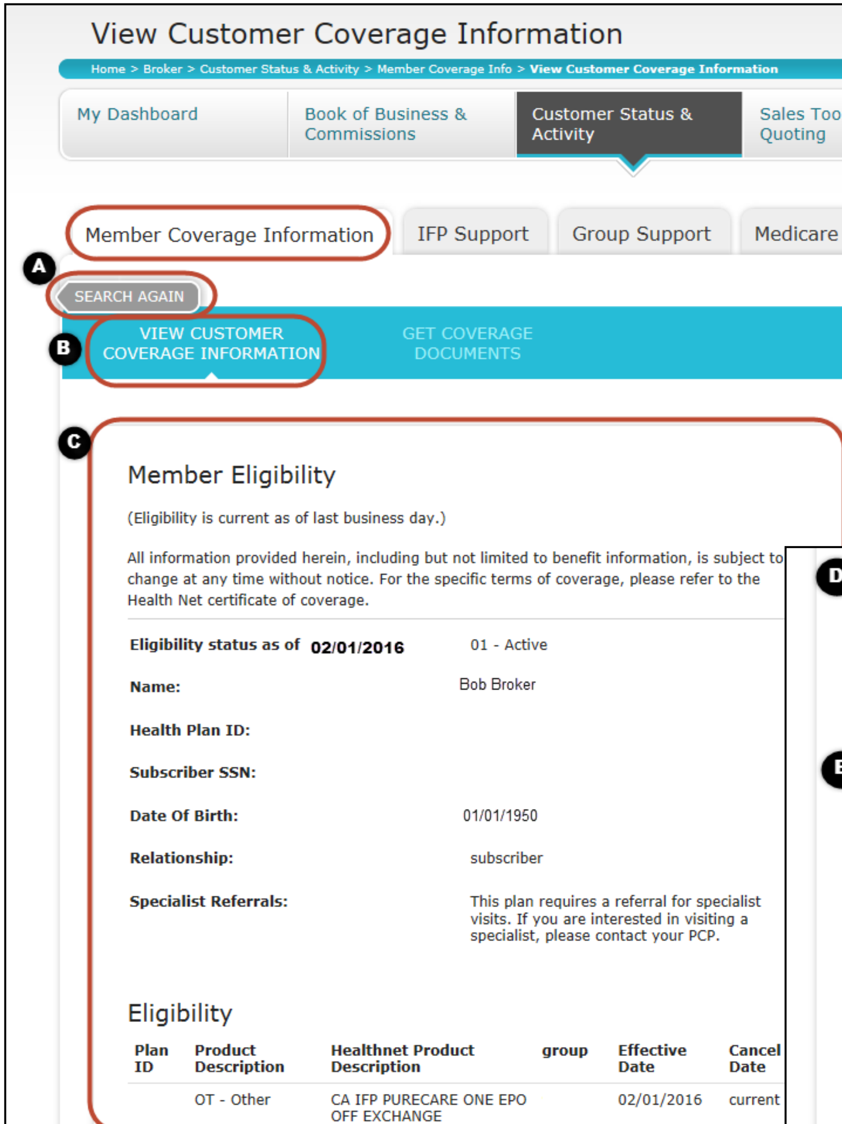
A. *Customer Status & Activity* tab

B. Under the *Customer Status & Activity* tab, you can:
- View member coverage information
- Access IFP support
- Access Group support

C. View member coverage by:
- Entering the Health Net member ID#
- Last name
- Date of birth
- Effective date

Note: Member information is more comprehensively listed in the *Book of Business* as well as here.

Customer Status & Activity – Member Coverage Information: View Customer Coverage Information



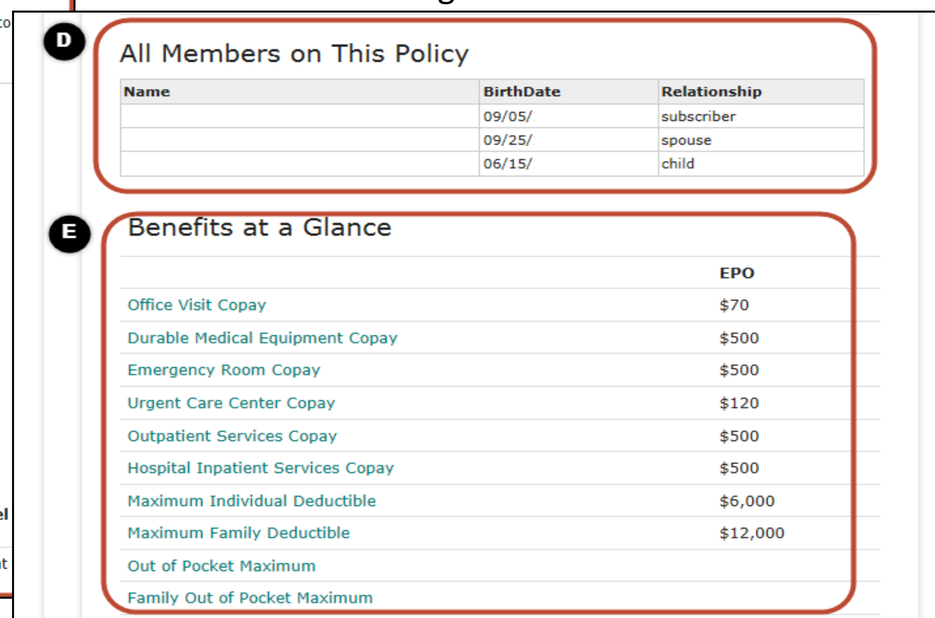
A. *Search Again* to return and search another member ID.

B. The *View Customer Coverage Information* tab populates member eligibility, members on the policy, and benefits at a glance based on the specifics entered from the previous page of the presentation.

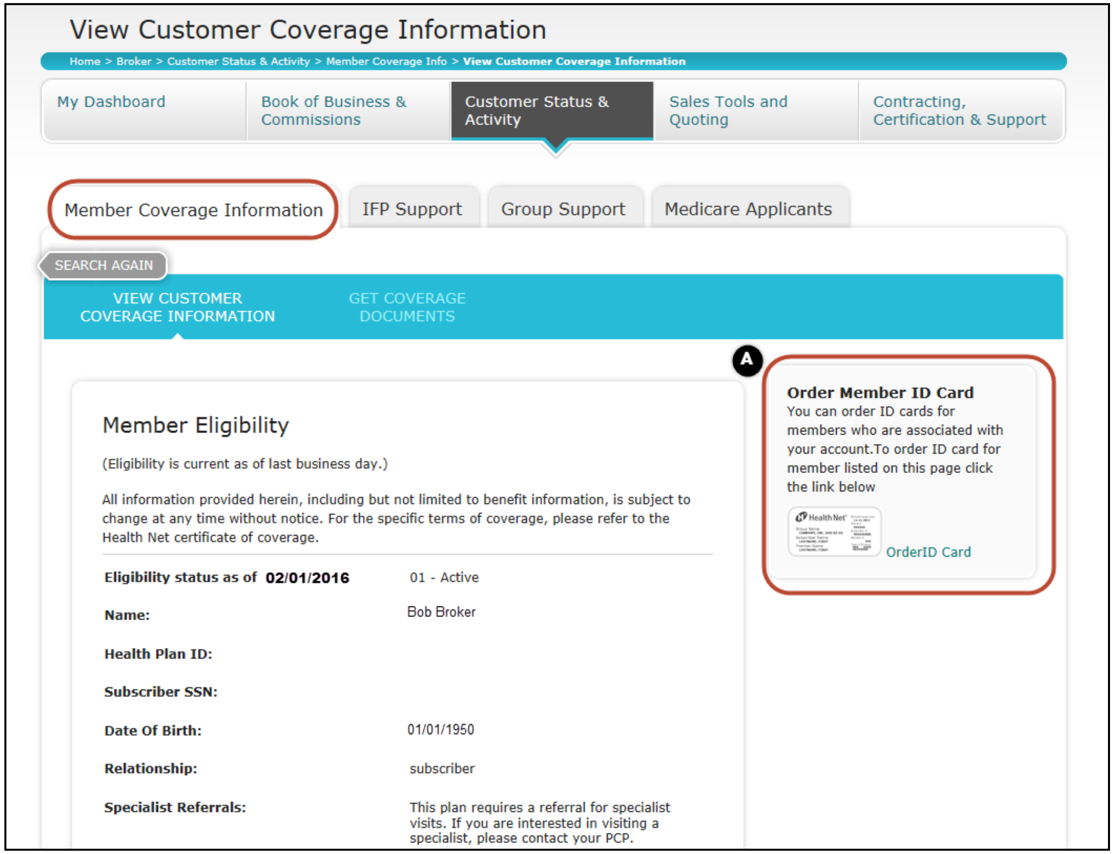
C. Member eligibility and plan information.

D. Members that are listed on the policy.

E. All benefits at a glance.



Customer Status & Activity – Member Coverage Information: Order Member ID Card



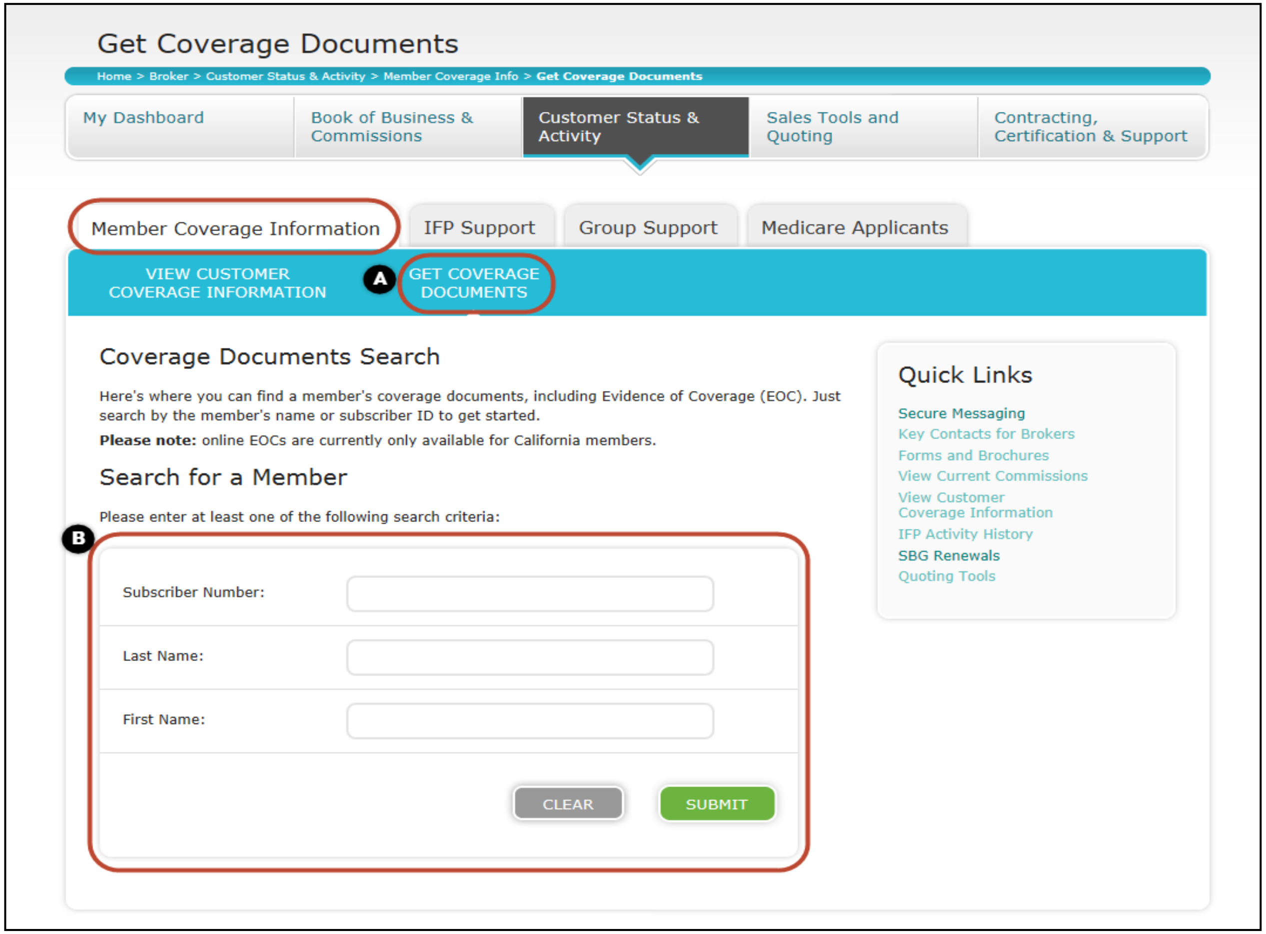
As a continuation from the previous page:

A. Brokers are able to order ID cards for members who are associated with the account.

Note: Click this link for the Ordering ID Cards for Your Clients information flyer.

Customer Status & Activity – Get Coverage Documents: Coverage Documents Search

Health Net®

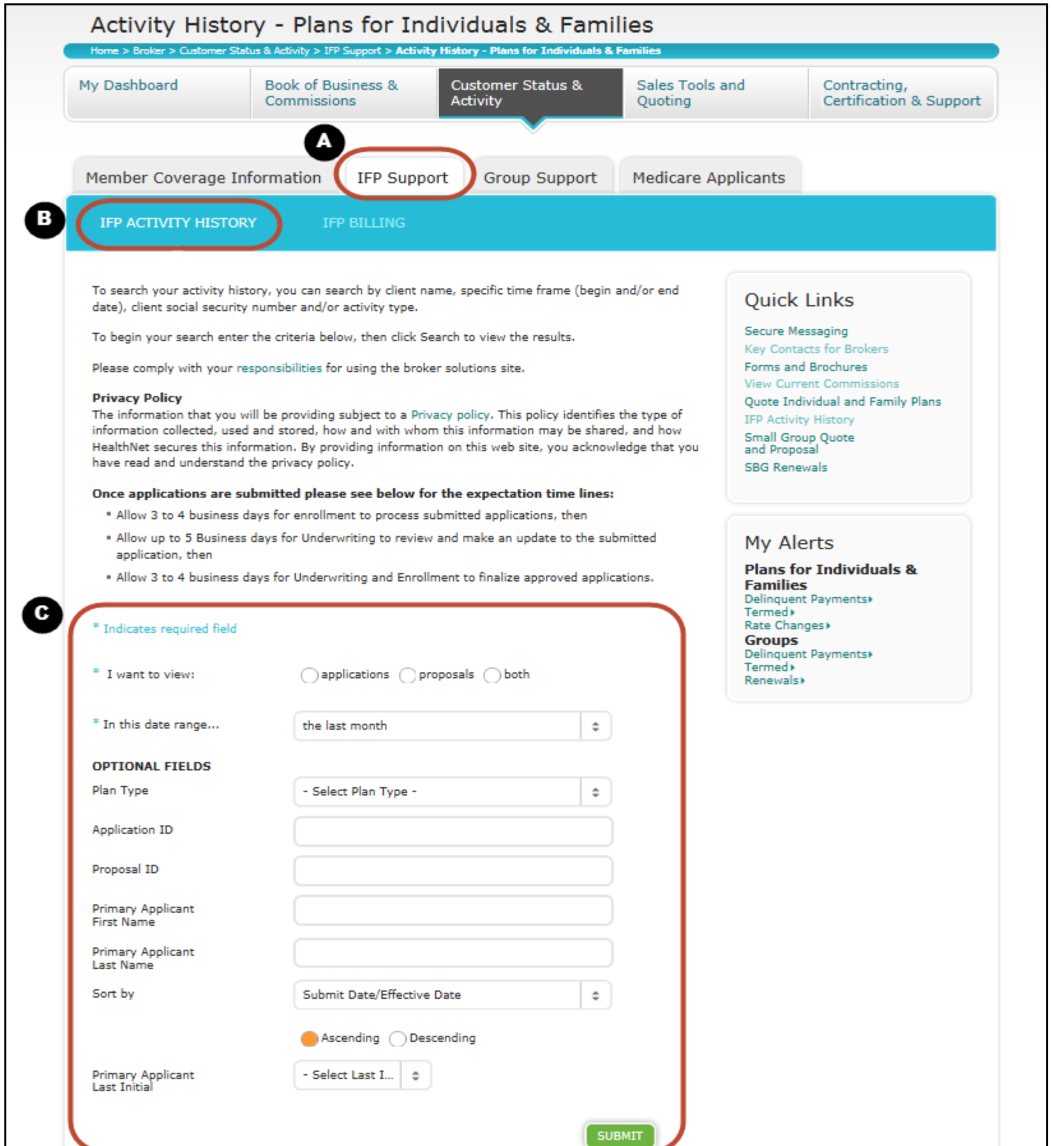


Search for member coverage documents:

A. Find a member's coverage documents, including Evidence of Coverage (EOC) by searching the member's name or subscriber ID.

B. Use this section to input member information.

Customer Status & Activity – IFP Support: IFP Activity History



Individual & Family Plan off-exchange application lookup:

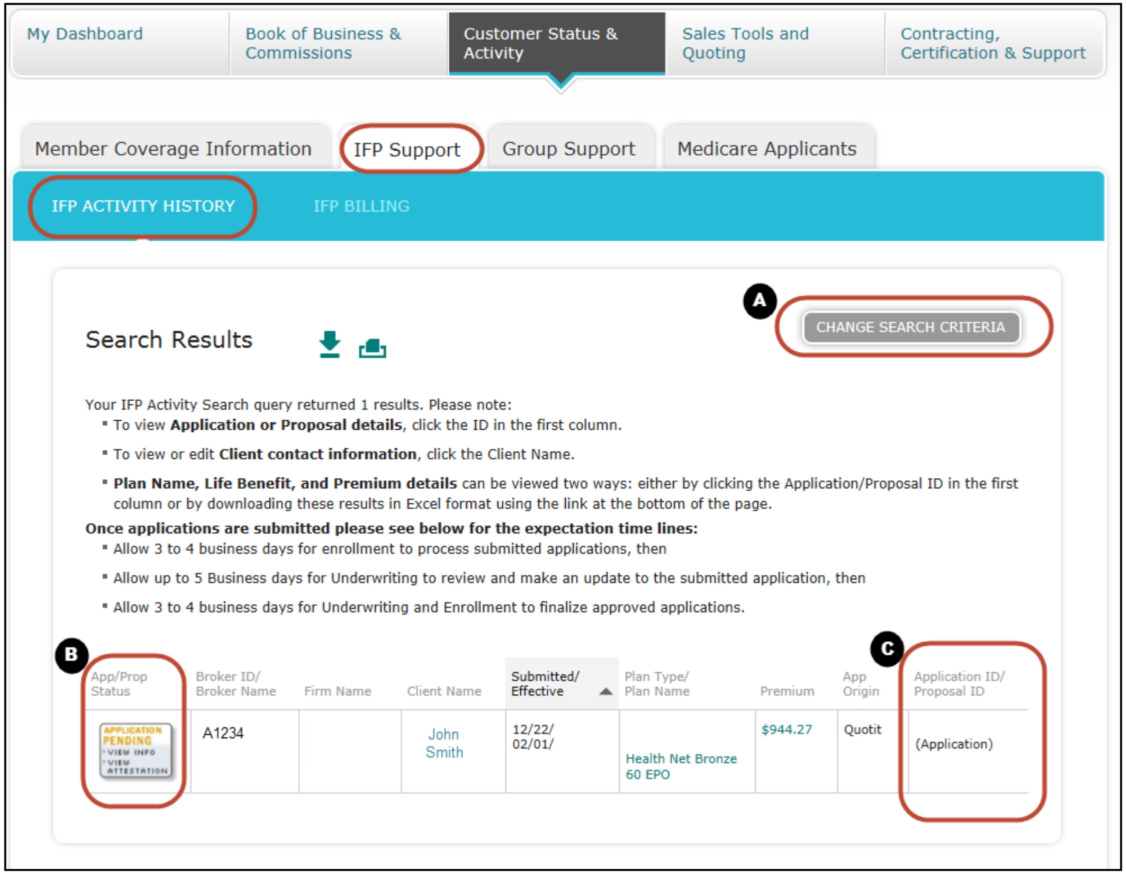
A. Under the *IFP Support* tab, view *IFP Activity History* and *IFP Billing*.

B. Under *IFP Activity History*, search your active history by entering member information. This also provides real-time status updates for submitted applications.

C. Use the member information in this section to view applications and/or proposals: Choose a date range and plan type, then click *Submit* to view results.

Note: Link to Activity History Instructional Guide

Customer Status & Activity – IFP Support: IFP Activity History *(continued)*



Individual & Family Plan application lookup search results:

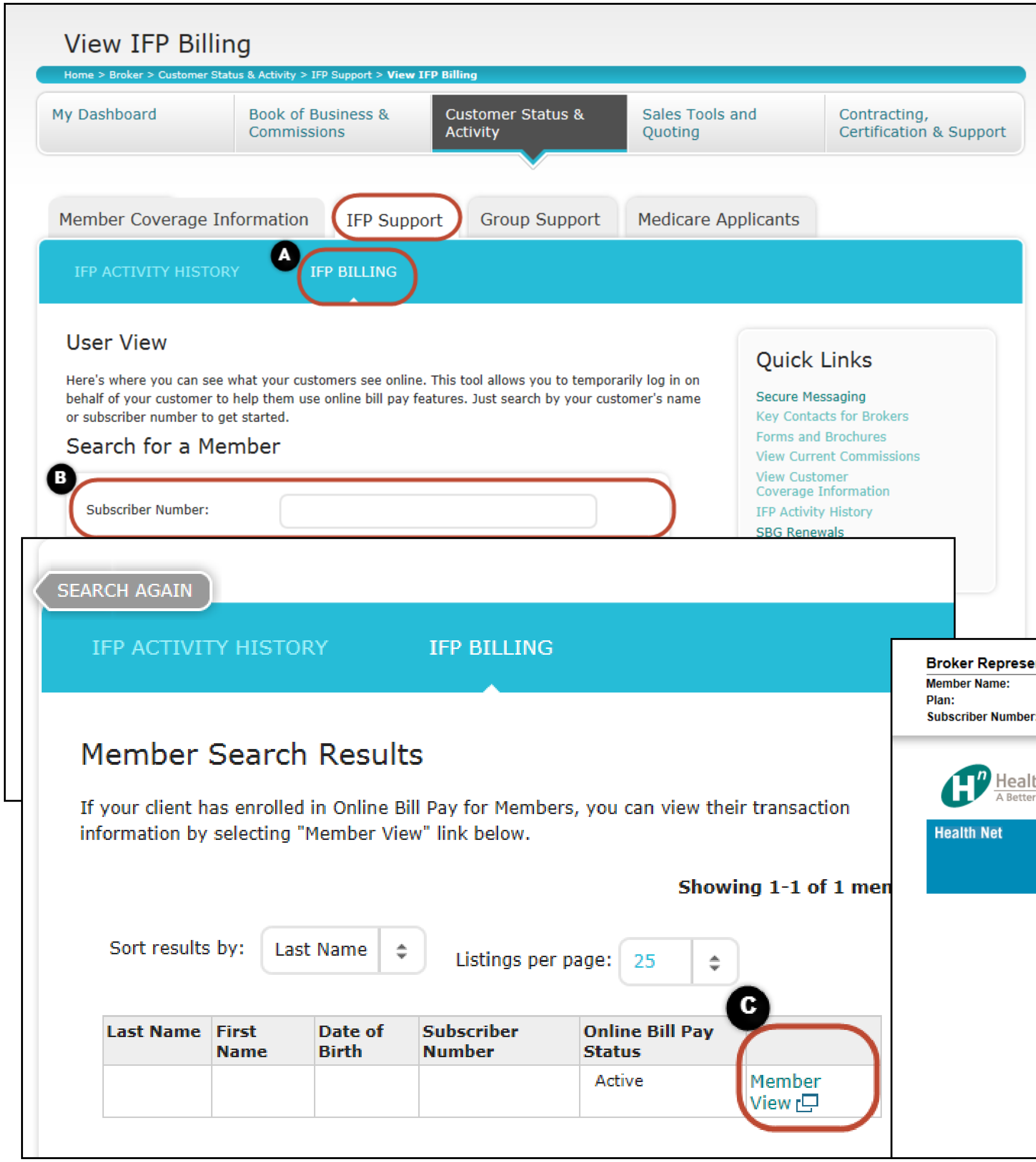
A. Update your search by clicking on this button. This will bring up the previous page to reenter any new search criteria.

B. View proposal information by clicking on the app status review. A new window will populate and contain important information specific to the broker.

C. View the application and proposal ID here. An ID number will be populated along with the status of the application.

Note: Attestation – To view and or complete your Broker Attestation, click on the *App/Prop Status* link under bullet B.

Customer Status & Activity – IFP Support: IFP Billing



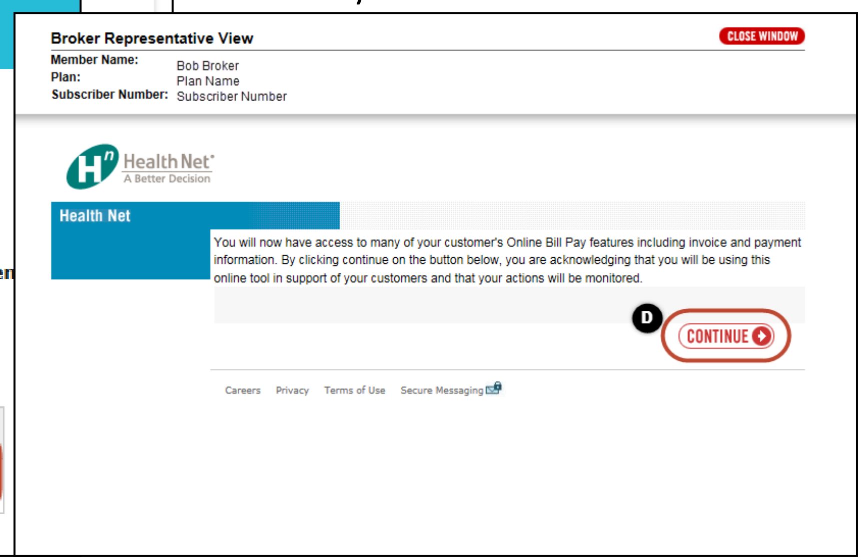
Individual & Family plan billing support:

A. Click on *IFP Billing* to search member results for billing data.

B. Enter the subscriber's ID number and click *Search.* Review the screen below for the results on the subscriber ID entered.

C. Search results will populate for the member. Then click on *Member View.*

D. The *Broker Representative View* page will populate. Click *Continue* to view bill history.



Customer Status & Activity – IFP Billing: View Bill History

VIEW BILL HISTORY   VIEW PREFERENCES

Bill History

Plan: CA IFP PURECARE

Subscriber Number:

Privacy & Security

Health Net is committed to protecting your information and ensuring your account is secure. View privacy policy

Display Bills and Payments

From Mar 2016 To May 2016 UPDATE

A

Bill Period	Description	Amount Due
05/01/	Bill View Detail ▸	944.27
04/01/	Bill View Detail ▸	944.27
03/01/	Bill View Detail ▸	944.27

*The bill detail for your first premium payment is included in the bill detail of your seco premium payment. Please click "view detail" for your second month to see the informa regarding your first two bills.

IFP customer Bill History and Bill Presentation view:

A. Click on *Bill View Detail* to get physical bill.

Health Net Life Insurance Company

Individual Bill

P.O. Box 9103
Van Nuys, CA 91409-9103

24 Hour Payment Line:
Customer Contact Center:

B

NAME	
Subscriber ID #	GROUP ID
DATE PREPARED	CURRENT PERIOD ACTIVITY
04-10-2016	05-01-2016 - 06-01-2016
PAYMENT DUE DATE	TOTAL AMOUNT DUE
	$944.27

PALM DESERT CA 92211-8218

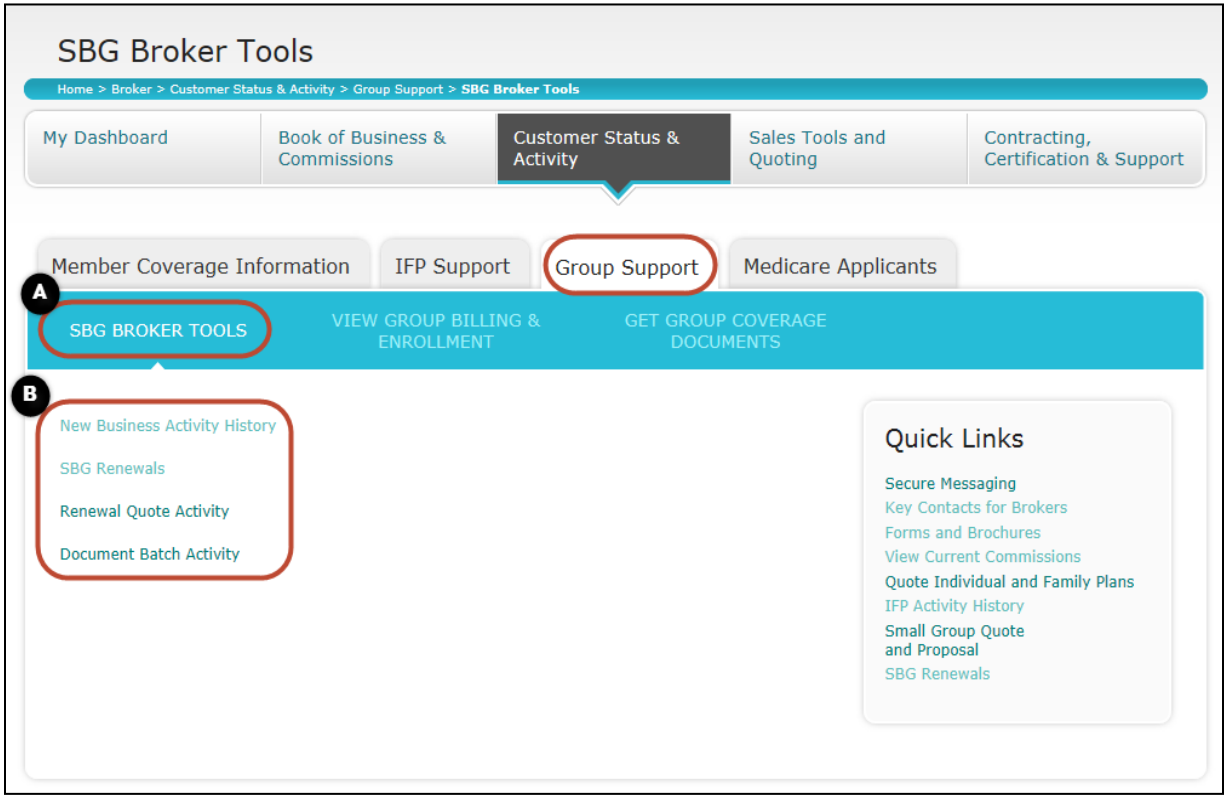
BILLING ACTIVITY	
Previous Balance	$944.27
Amount Received	$944.27
Balance Forward	$0.00
Current Amount Due	$944.27
Adjustments	$0.00
Total Amount Due	$944.27

Register on HealthNet.com to view payment options and history.

PLEASE BE ADVISED THAT THE ABSENCE OF THE ATTACHED COUPON BELOW WITH YOUR PAYMENT MAY RESULT IN PAYMENT PROCESSING DELAYS.

B. A copy of the member's bill will populate. Member information will be listed, including name, subscriber ID and group ID, date prepared, current period activity, due date, total amount due, and billing activity.

Customer Status & Activity – Group Support: SBG Broker Tools

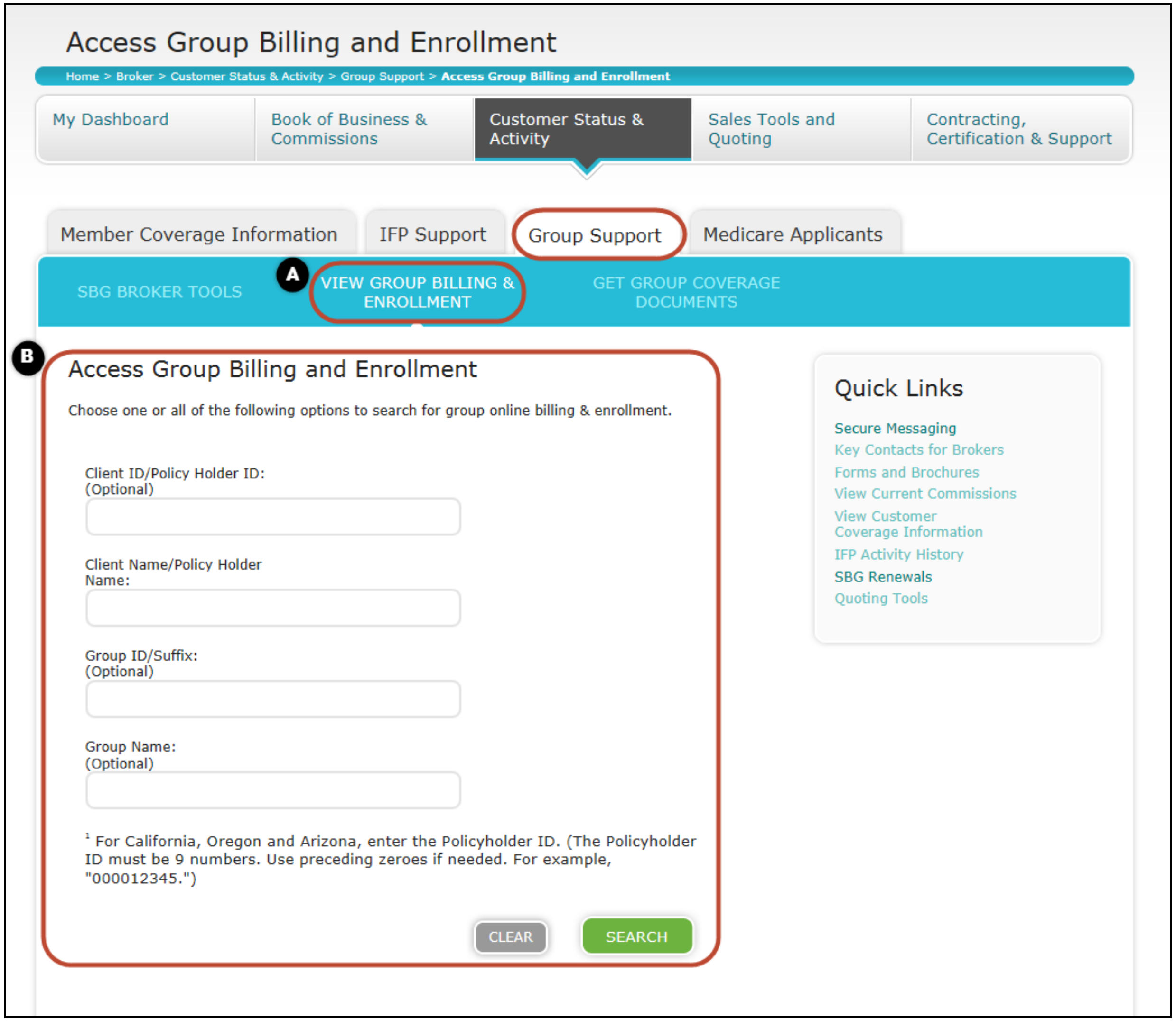


Under the *Group Support* tab, you will find information on SBG Broker Tools, Group Billing and Enrollment, and Group Coverage Documents.

A. Under *SBG Broker Tools*, you will find Links to Small Business Group activity history tool for Small Group (1–100) business.

B. Links include:
- New business activity history
- SBG renewals
- Renewal quote activity
- Document batch activity

Customer Status & Activity – Group Support: Access Group Billing & Enrollment



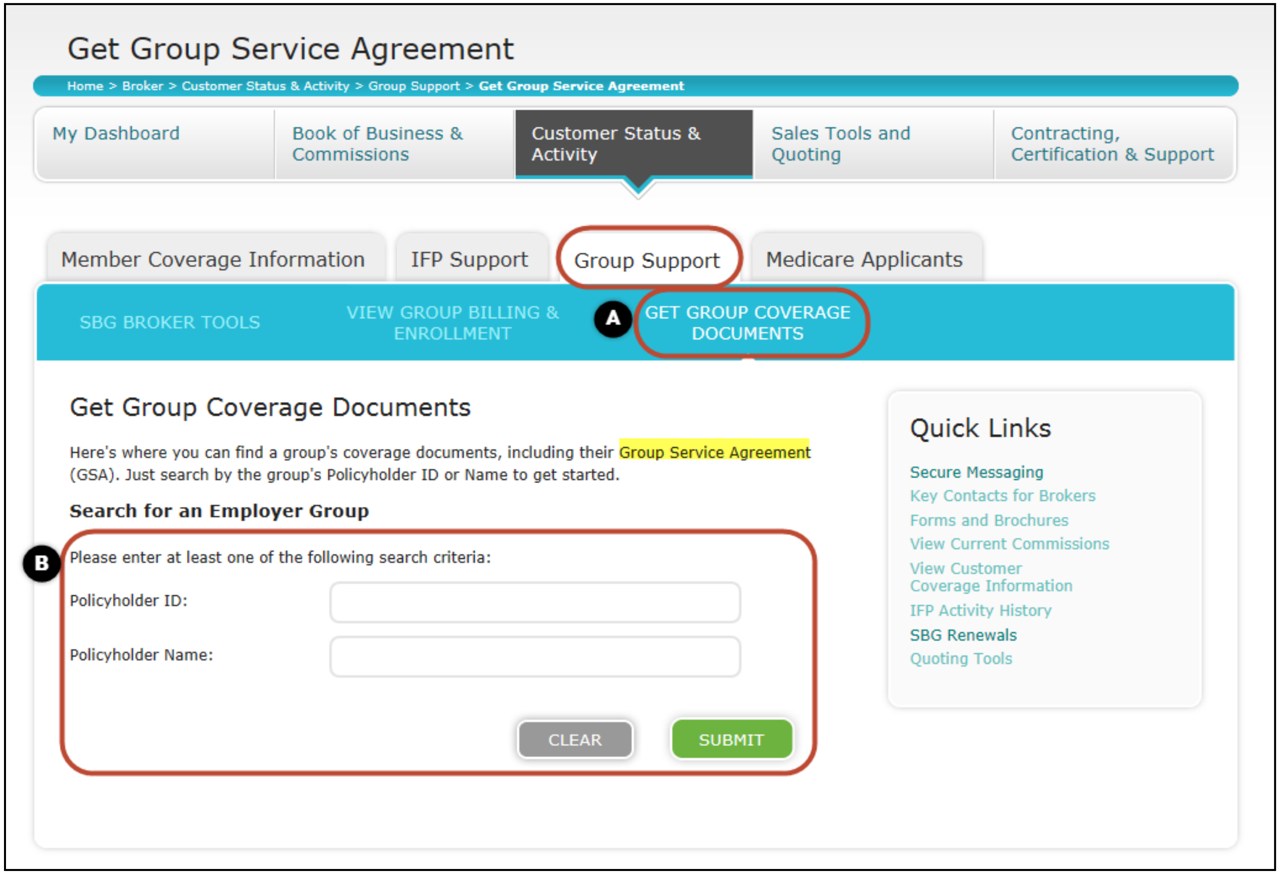
Access to Group Billing and Enrollment:

A. View the second tab under *Group Support* for group billing and enrollment.

B. Use this section to view billing and enrollment information. Also, this section can enroll members or pay bills on their behalf if* access has been granted by the group.

- Search by:
  - Client ID
  - Client name
  - Group ID
  - Group name

Customer Status & Activity – Group Support: Get Group Coverage Documents

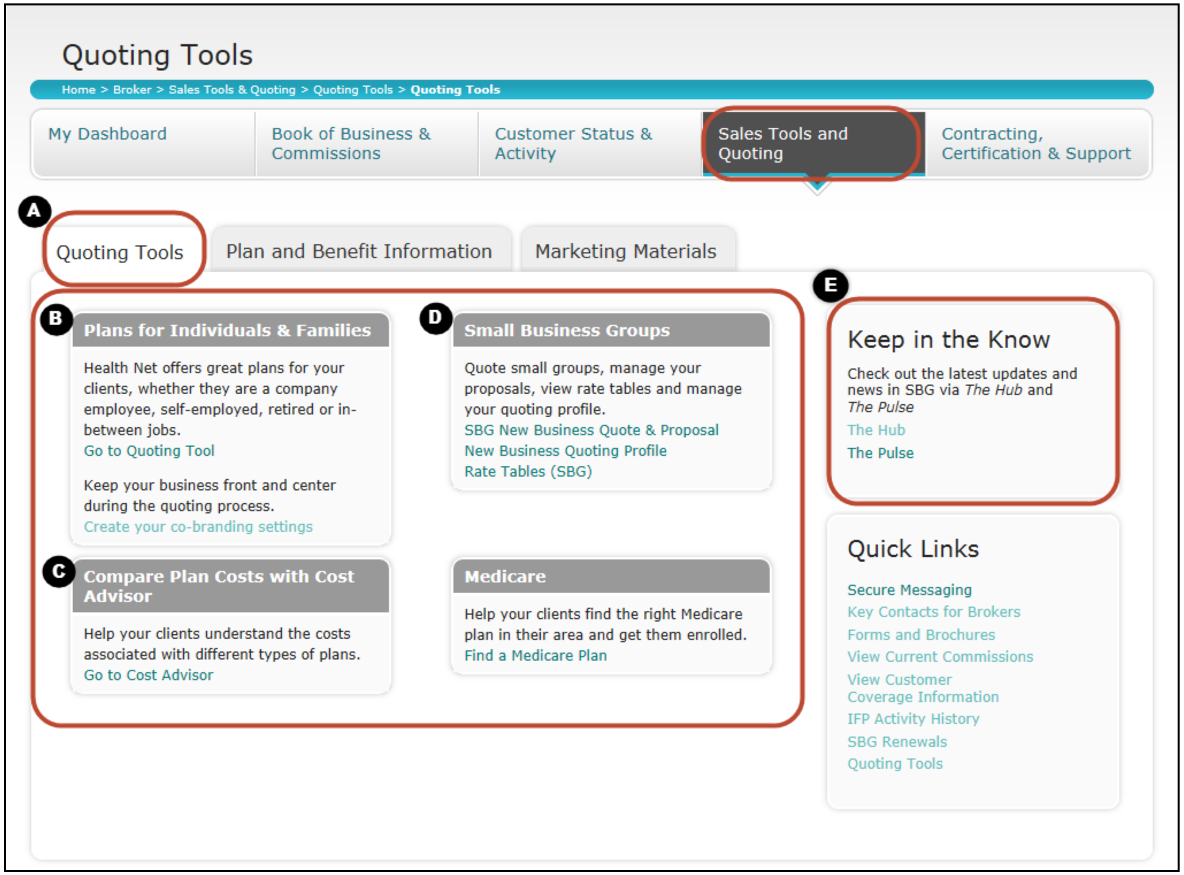


Search for a Group Service Agreement (GSA) which includes the EOC:

A. Get group coverage documents.

B. Search for GSA using the policyholder ID or name.

Sales Tools and Quoting – Quoting Tools



Sales and Quoting Tools:

A. Under *Quoting Tools*, find plans for individuals and families, compare plan costs with Cost Advisor, and access small business group information.

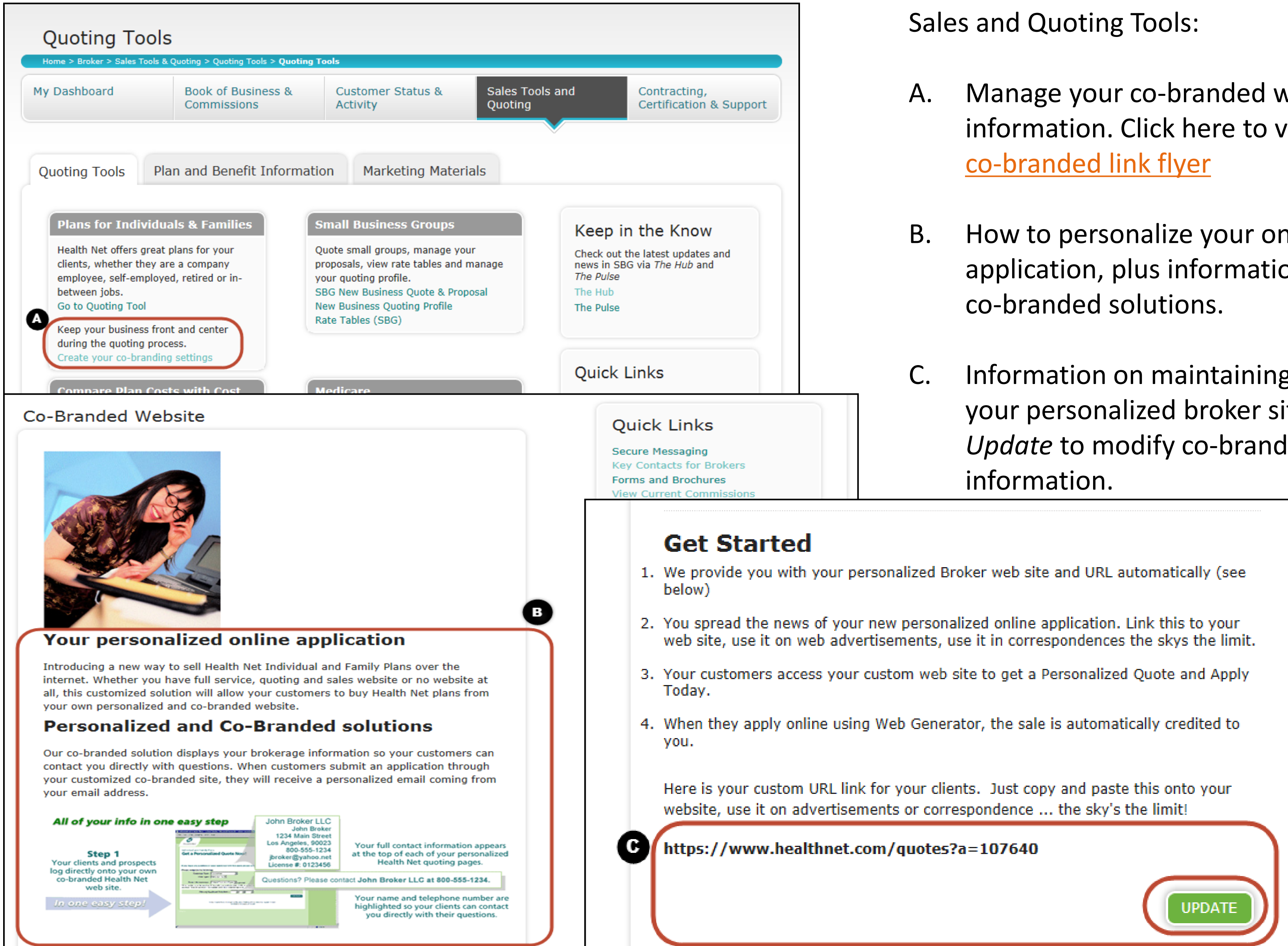
B. Links to quoting tools enable the broker to build a Proposal for an IFP prospect only off-exchange.

C. Cost Advisor tool – Understand costs associated with different plan types.

D. Link to the SBG quoting tool that allows for managing proposals, rates and profiles.

E. Links to:
- Pulse, which is where you will find broker articles to keep you informed.
- The HUB, a small group resource.

Sales Tools and Quoting – Quoting Tools: Co-branded Information



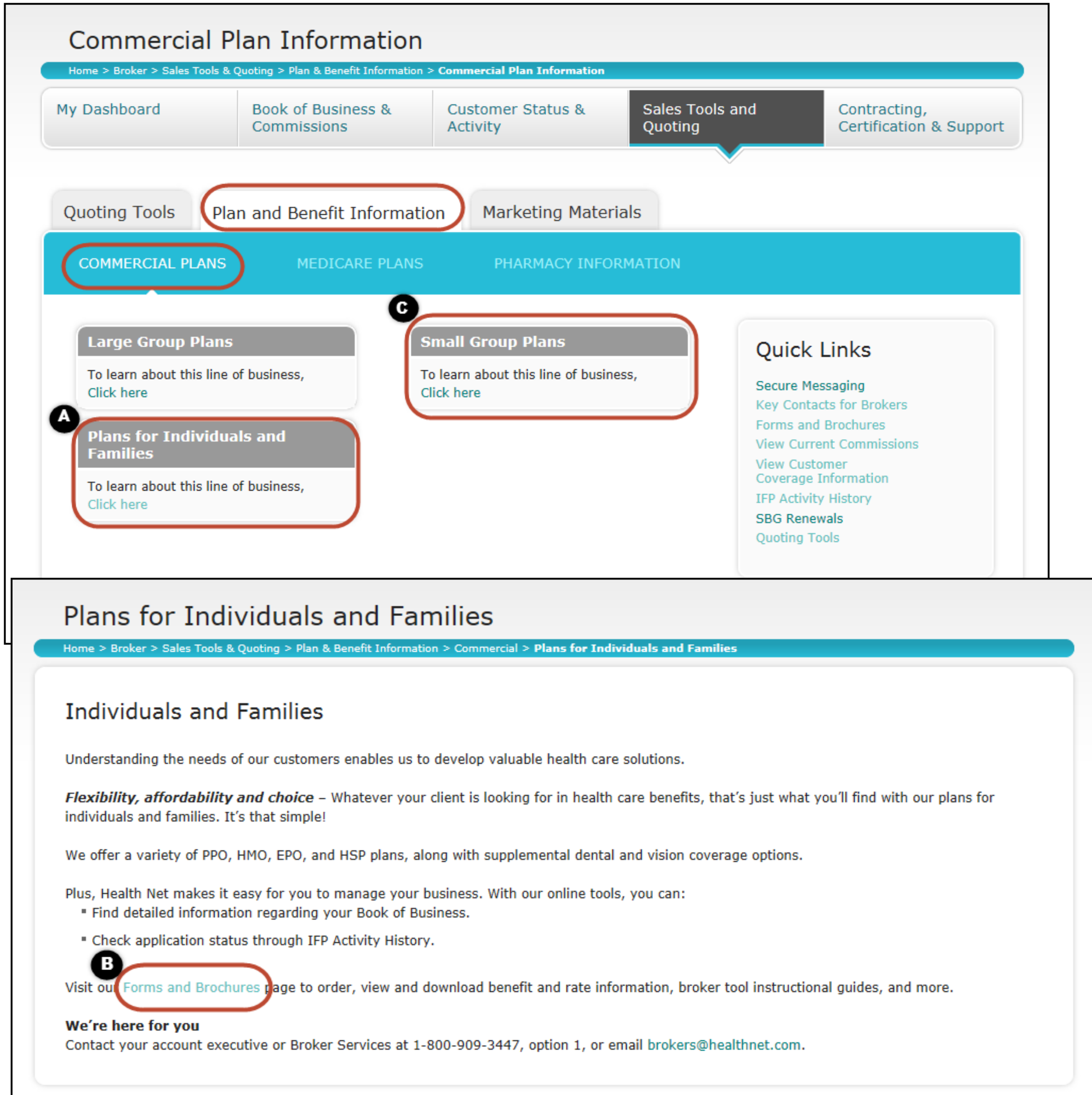
Sales and Quoting Tools:

A. Manage your co-branded website information. Click here to view the co-branded link flyer

B. How to personalize your online application, plus information on co-branded solutions.

C. Information on maintaining/updating your personalized broker site. Click *Update* to modify co-branded link information.

Sales Tools and Quoting – Plan and Benefit Information: Commercial Plans



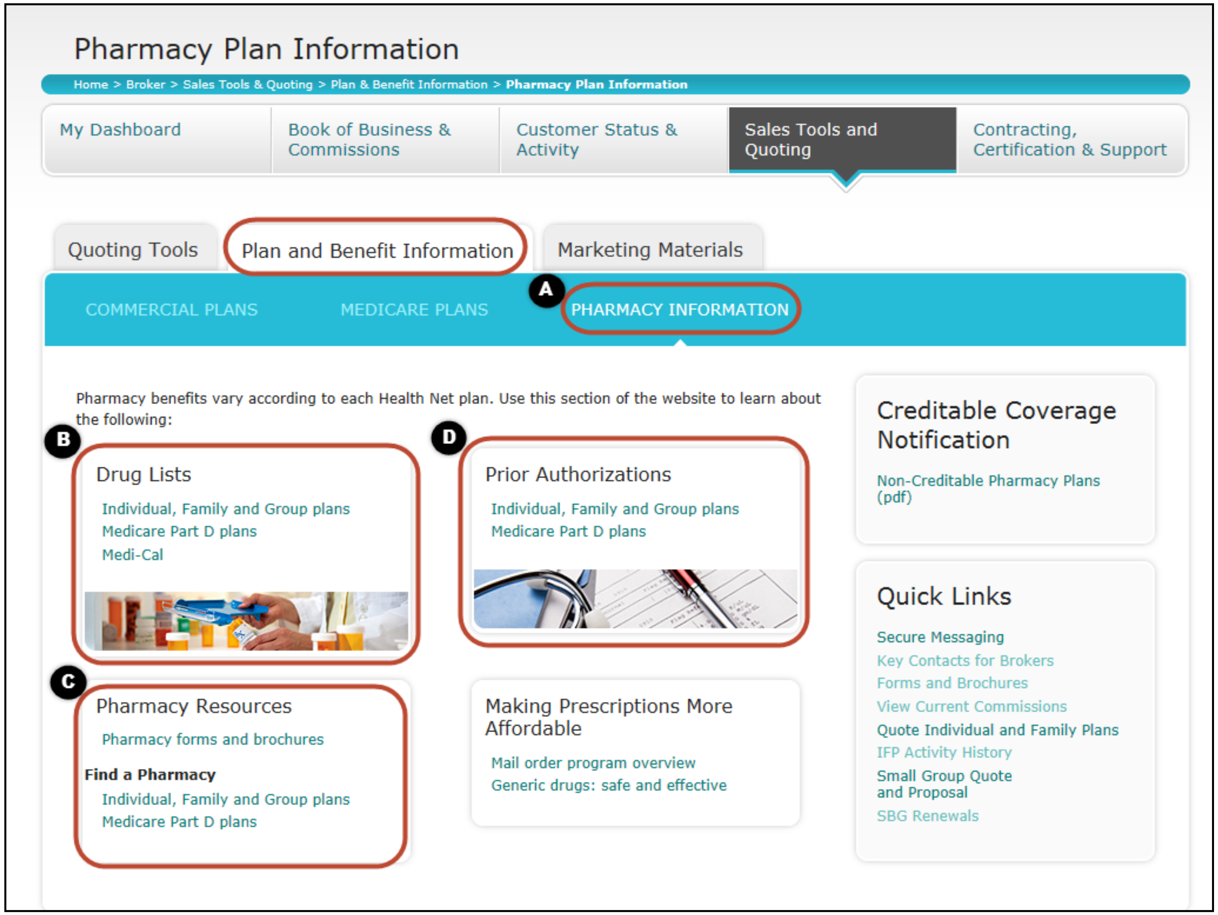
Information and collateral related to selling Health Net plans.

A. Click to get current information on plans for individuals and families.

B. After clicking on *A* above, you will see a link to our Forms and Brochures page to order, view and download what you need.

C. When you click to see information on our small group plans, you learn about:
- Overview
- Tailored network
- Product information such as HMO/Salud/PPO/HSA
- Supplemental coverage

Sales Tools and Quoting – Plan and Benefit Information: Pharmacy Information



Click on *Plan and Benefit Information* to find pharmacy plan information:

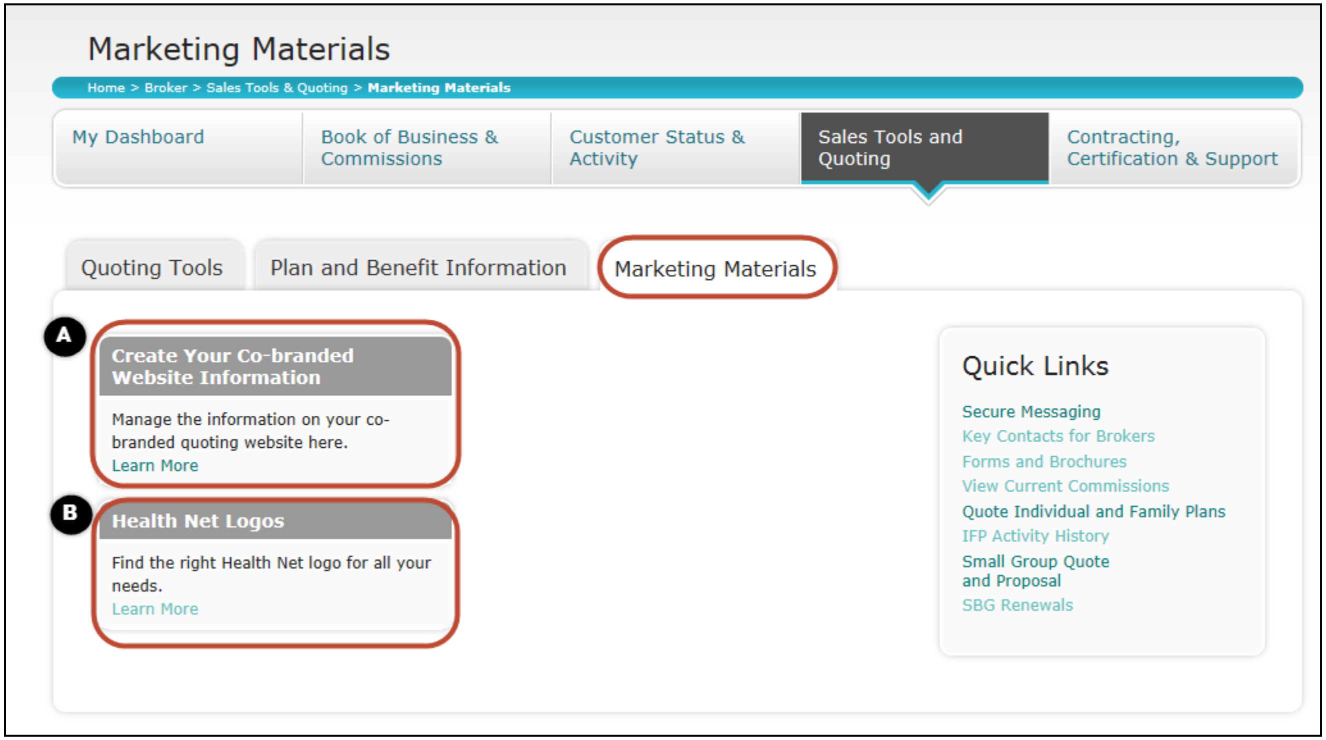
A. Section for pharmacy information regarding drug lists, pharmacy resources, authorizations, and prescription information.

B. Drug lists with information for individual, family and group, Medicare Part D, and Medi-Cal plans.

C. Pharmacy resources, including forms and brochures and finding a pharmacy.

D. Prior authorization information for individual, family and group, and Medicare Part D plans.

Sales Tools and Quoting – Marketing Tools

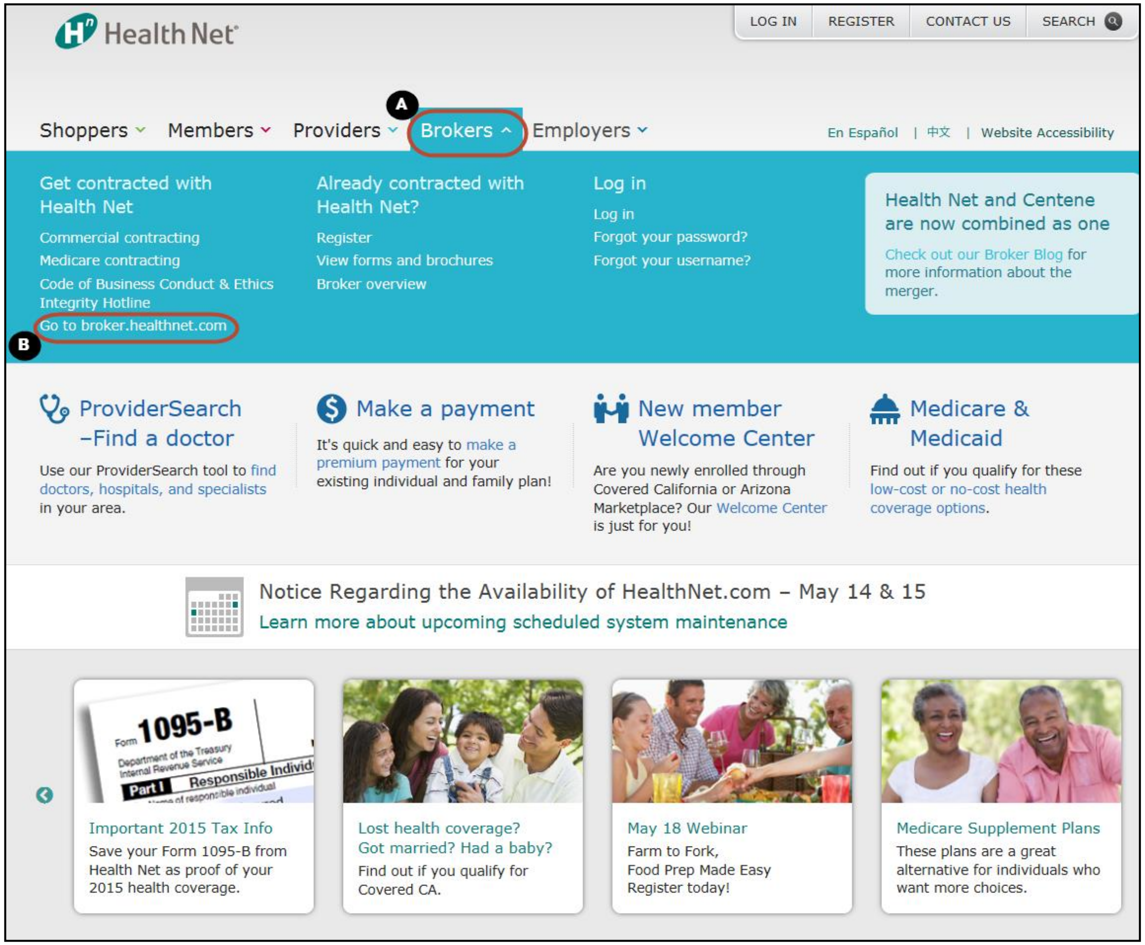


A. Co-branded link creator. Create and manage the information on your co-branded website by clicking the *Learn More* link. See page 36.

B. Downloadable Health Net logos. Health Net logos are provided for downloading.

Health Net

Sales Tools and Quoting – The Broker HUB



Check Broker Hub for relevant materials:

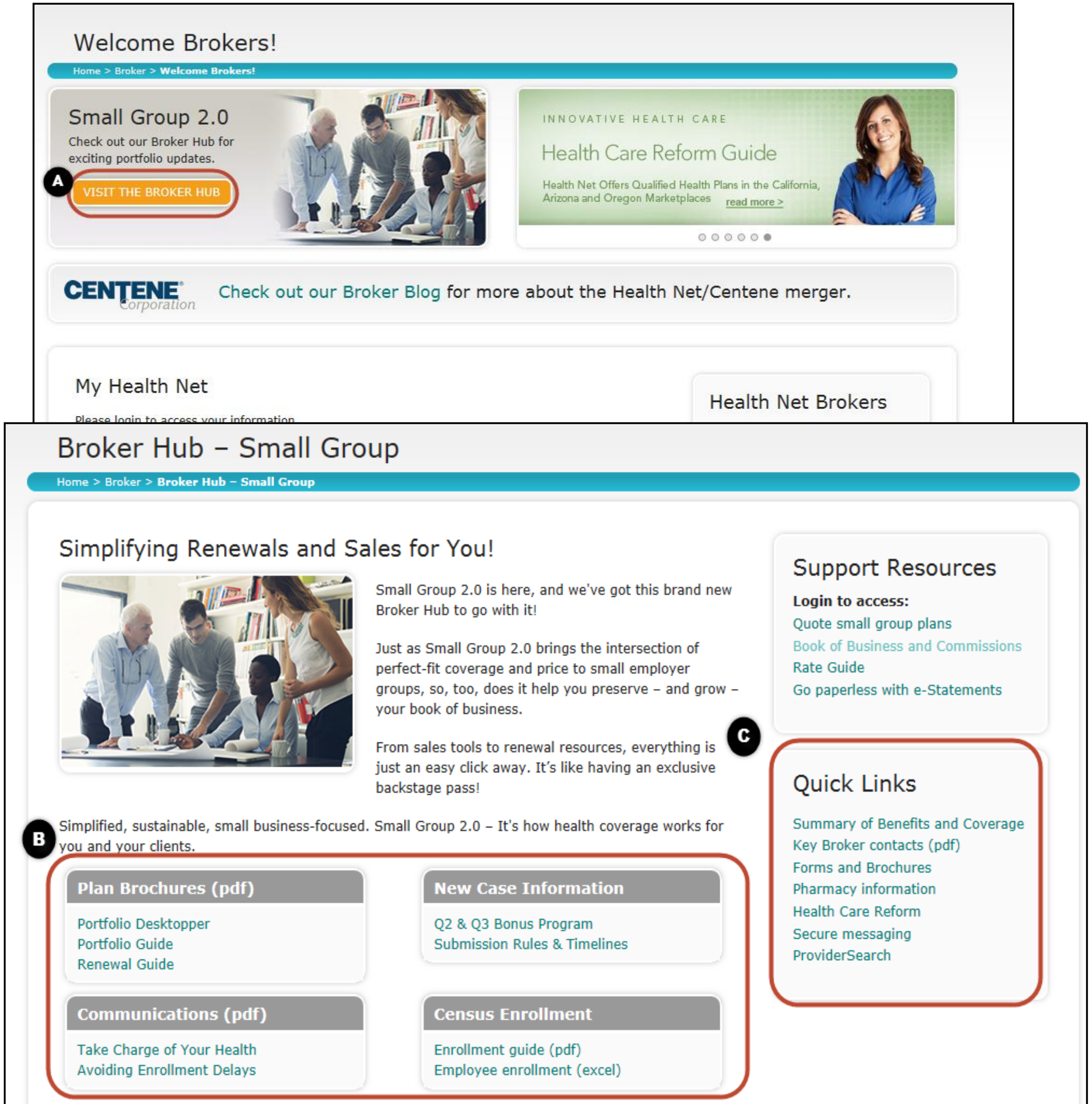
A. To find *Broker HUB* from the main site, click on *Brokers*.

B. Once clicked, a dropdown menu will appear. Click on *Go to broker.healthnet.com*. This will bring up the *Broker HUB* screen

Note: Continue to next slide for more information.

Sales Tools and Quoting – The Broker HUB *(continued)*

Health Net



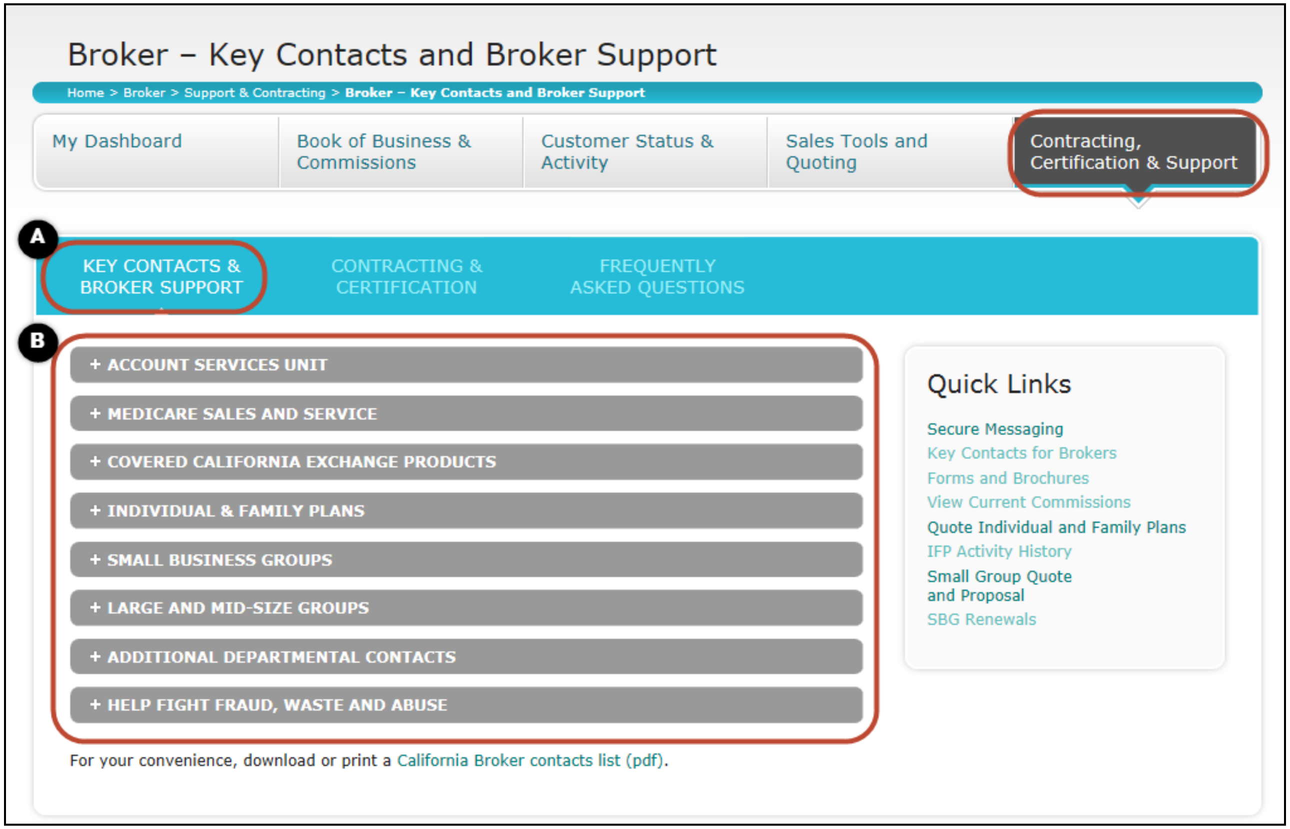
Check Broker Hub for relevant materials:

A. Click on *VISIT THE BROKER HUB* to find relevant and updated materials. The link is provided below. (Broker information on this page is consistently updated.) https://www.healthnet.com/portal/broker/home.ndo

B. Information regarding plan brochures, communications, new case information, and enrollment census can be found.

C. Quick links to additional important information.

Contracting, Certification & Support – Key Contacts & Broker Support

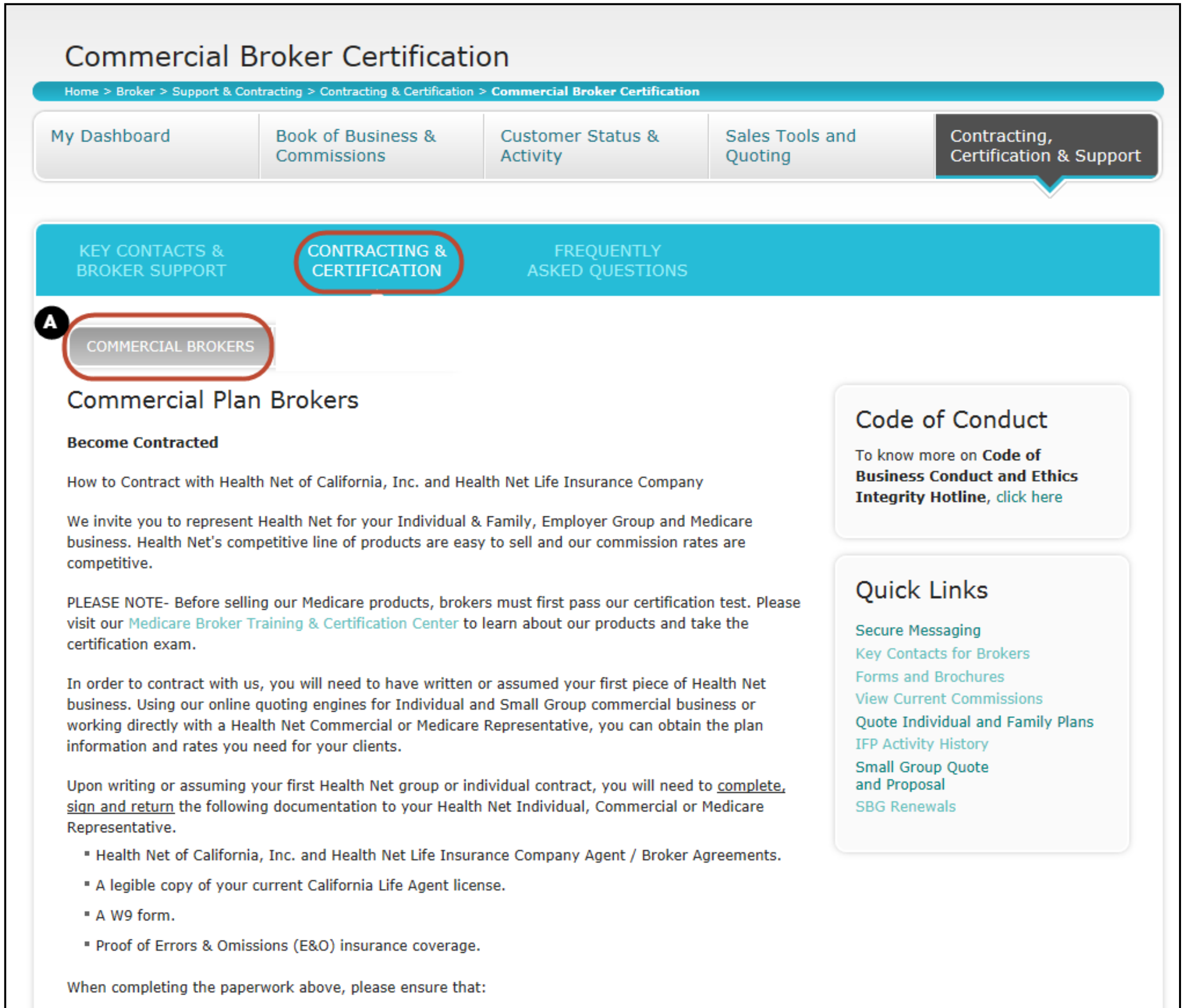


Contracting, Certification & Support:

A. Here, brokers can find information for contact & support, contracting & certification, and frequently asked questions.

B. In this section, brokers are able to find the list of services, support and contacts.

Contracting, Certification & Support – Contracting & Certification


Commercial Broker Certification

Home > Broker > Support & Contracting > Contracting & Certification > **Commercial Broker Certification**

My Dashboard | Book of Business & Commissions | Customer Status & Activity | Sales Tools and Quoting | Contracting, Certification & Support

KEY CONTACTS & BROKER SUPPORT | CONTRACTING & CERTIFICATION | FREQUENTLY ASKED QUESTIONS

A COMMERCIAL BROKERS

Commercial Plan Brokers

Become Contracted

How to Contract with Health Net of California, Inc. and Health Net Life Insurance Company

We invite you to represent Health Net for your Individual & Family, Employer Group and Medicare business. Health Net's competitive line of products are easy to sell and our commission rates are competitive.

PLEASE NOTE- Before selling our Medicare products, brokers must first pass our certification test. Please visit our Medicare Broker Training & Certification Center to learn about our products and take the certification exam.

In order to contract with us, you will need to have written or assumed your first piece of Health Net business. Using our online quoting engines for Individual and Small Group commercial business or working directly with a Health Net Commercial or Medicare Representative, you can obtain the plan information and rates you need for your clients.

Upon writing or assuming your first Health Net group or individual contract, you will need to complete, sign and return the following documentation to your Health Net Individual, Commercial or Medicare Representative.

- Health Net of California, Inc. and Health Net Life Insurance Company Agent / Broker Agreements.
- A legible copy of your current California Life Agent license.
- A W9 form.
- Proof of Errors & Omissions (E&O) insurance coverage.

When completing the paperwork above, please ensure that:

- The name on the Agreement, license and W9 form match exactly

Code of Conduct

To know more on **Code of Business Conduct and Ethics Integrity Hotline**, click here

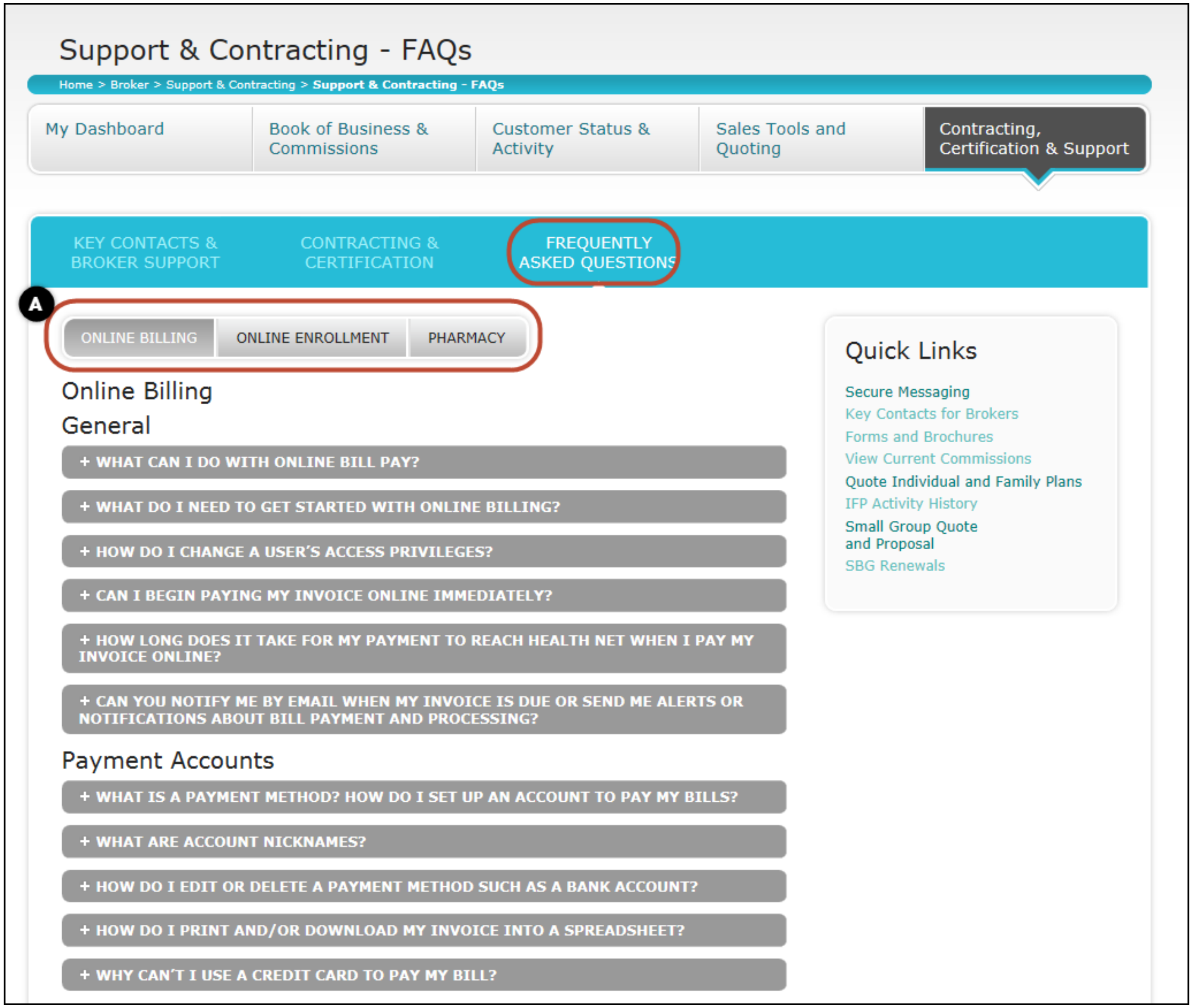
Quick Links

Secure Messaging
Key Contacts for Brokers
Forms and Brochures
View Current Commissions
Quote Individual and Family Plans
IFP Activity History
Small Group Quote and Proposal
SBG Renewals

Contracts & Certification information:

A. Commercial plan broker information. How to become contracted with Health Net of California, Inc. and Health Net Life Insurance Company

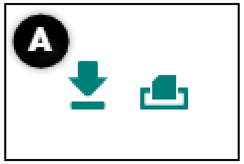
Contracting, Certification & Support – FAQs



Frequently Asked Questions:

A. Find out frequently asked questions for online billing, enrollment, pharmacy, and others.

Legend



A. Download as excel file or print results.

B. List of application or proposal status.

C. List of additional common alerts and icons.