

For Individuals & Families and Group
Health Net of California, Inc. HMO Plans and
Health Net Life Insurance Company PPO Plans

Broker Book of Business *Tool*

Makes managing your business online even easier!



Josefina Bravo,
Health Net
*We put affordable
health care coverage
within reach of
more people.*



Health Net®

Simple *to Use,* Easy *to Understand*



Your Book of Business is available online. We know it can be challenging to manage your individual and group accounts. Our Book of Business feature gives you the tools you need to make doing business easier. And best of all, you get results quickly and conveniently.

It's easy to view your Health Net business in ways that work for you. With user-friendly search features, you'll save time by going straight to the information you need – right when you need it. Start using our Broker Book of Business tool today:

- Log in to your broker account at www.healthnet.com.
- Click on *Book of Business & Commissions* in the navigation bar spanning across the page.
- From here, you can click one of three tabs: *Individuals & Families*, *Groups* or *View Commissions*.

Plans for Individuals & Families

Home > Broker > Book of Business & Commissions > Plans for Individuals & Families

MY DASHBOARD **BOOK OF BUSINESS & COMMISSIONS** Review your list of clients and information. CUSTOMER STATUS & ACTIVITY SALES TOOLS & QUOTING CONTRACTING, CERTIFICATION & SUPPORT

Individuals & Families Groups View Commissions

Plans for Individuals & Families

Book of Business information regarding Plans for Individuals & Families is available below. To view details for a given Subscriber, including dependent information, please click on a Subscriber name.

You can modify your search by entering or changing values below and clicking Submit.

Status: Active

Subscriber Name:	<input type="text"/>	Original Effective Date:	<input type="text"/>	To:	<input type="text"/>
Subscriber ID:	<input type="text"/>	Plan Effective Date:	<input type="text"/>	To:	<input type="text"/>
Plan Name:	<input type="text"/>	Cancellation Date:	<input type="text"/>	To:	<input type="text"/>
Plan Type:	Select...	Status:	Active		
Alert Type:	Do not filter by Alert Type	<small>Note: to view pending Plans for Individuals & Families business, please go to the Broker Activity History page.</small>			

Plans for Individuals and Families

1 Search options

Choose your search options to view your individual client status.

- Subscriber name
- **Subscriber ID (member identification / R #)**
- Plan name
- Plan type (use drop-down menu)
- Alert type (use drop-down menu)
- OED (original effective date)
- Plan effective date
- Cancellation date
- Status (use drop-down menu)

2 Link to Broker Activity History has been added, giving you a quick shortcut to check your pending business.

3 At any time, you can select this icon to save your search results directly into a Microsoft Excel file.

4 At any time, you can select this icon to print your search results.

5 Alerts legend helps you understand what each of the Alert icons means.

Search results

Sort your results based on your business need – by subscriber name, subscriber ID, plan type, plan effective date – whatever you prefer.

6 Subscriber Details tab

Click on a subscriber name to get the demographic detail for each individual, including:

- Plan type
- Address
- Plan name
- Date of birth
- Plan effective date
- Age
- Cancellation date
- Monthly premium
- Paid through date

7 Dependent Details tab

Click on this tab to view details for each of the dependents.

The screenshot shows the 'Plans for Individuals & Families' web application. At the top, there are navigation tabs for 'Individuals & Families', 'Groups', and 'View Commissions'. Below this is a search form with fields for Subscriber Name, Subscriber ID, Plan Name, Plan Type, Alert Type, Original Effective Date, Plan Effective Date, and Cancellation Date. A 'SEARCH' button is at the bottom right of the form. A red circle '1' highlights the search form. A red circle '2' highlights a note box that says 'Note: To view pending Plans for Individuals & Families Business, please go to the Broker Activity History page.' A red circle '3' highlights an Excel icon, and a red circle '4' highlights a print icon. A red circle '5' highlights an alert icon in a table. A red circle '6' highlights the 'Subscriber Details' tab, and a red circle '7' highlights the 'Dependent Details' tab. A large callout box titled 'What do the Alert Icons mean?' lists several alert types: 'Individual or Group has Termined.', 'This subscriber may have had a rate Increase within the last 60 days.', 'Individual or Group is Delinquent. Future payment may be scheduled; hover over the \$ icon for this Individual or Group for more info.', 'Group is up for Renewal within the next 60 days.', and 'Individual or Group will terminate within 90 days'. A note at the bottom of the callout says 'Note: Alerts are current as of 04/08/2014.' Below the callout, the 'Subscriber Details' tab for 'SUBSCRIBER FIVE' is shown, displaying contact information, subscriber status, and medical plan codes. The 'Dependent Details' tab is also shown, displaying a table of dependents.

Subscriber Name	Subscriber ID	Plan	Status	Broker ID	Alerts
SUBSCRIBER ONE	R0000001	CA PPO I P W	Active	CABRKR	?
SUBSCRIBER TWO	R0000002	C	Active	CABRKR	?
SUBSCRIBER THREE	R0000003		Active	CABRKR	?
SUBSCRIBER FOUR	R0000004		Active	CABRKR	?
SUBSCRIBER FIVE	R0000005		Active	CABRKR	?
SUBSCRIBER SIX	R0000006		Active	CABRKR	?

Name	Relation	Physical Address	DOB	Age	Status	Mbr Eff Date	OAD
LITTLE BOY	Child	123 1ST STREET LOS ANGELES, CA 90010	02/24/07	7	Active	02/15/13	No
LITTLE GIRL	Child	123 1ST STREET LOS ANGELES, CA 90010	07/23/96	17	Active	02/15/13	No

8 Billing / Rate / Renewal Information details tab

Click this tab to find payment information, including:

- Due date
- Amount due
- Balance due
- Last payment made
- Past premium amount
- Current premium
- Balance forward from current bill
- Amount paid
- Premium payment method
- Consolidated billing (Yes/No)
- % of rate change (N/A if no rate change within the past 60 days)

Subscriber Details: SUBSCRIBER FIVE \$

VIEW SCHEDULE OF BENEFITS

Subscriber Details Dependent Details 8 Billing / Rate / Renewal Information

Invoice & Payment Details		Billing & Rate Details	
Balance Forward (Prior Balance)	\$0.00	Bill Type ?	Standard billing
Current Period Amount Due ?	\$0.00	Current Premium (Premium) ?	\$0.00
Adjustments	\$0.00	Last Month's Premium	\$0.00
Payments	\$0.00	% of Rate Change	0.0%
Balance Due ?	\$0.00	Payment Method	
Due Date of Current Bill		Consolidated Billing	N
Paid Through Date	02/15/2013		
Last Payment Made			
Last Payment Amount	\$0.00		

Delegate various levels of access to brokers registered under your firm's ID

Set up and delegate which areas of your Book of Business you want your brokers to have access to in order to help them manage their accounts. To set up your brokers, go to *View and Manage Accounts > Manage Broker Accounts*. The brokers who you have registered using your association ID number, will be displayed.

Select the broker name you are allowing or denying access for and check the roles you are delegating:

- New Business Quote & Proposal (SBG)
- New Business Quote Activity (SBG)
- Quoting Profile/Underwriting (SBG)
- Renewal Quote Activity (SBG)
- SBG Renewals
- Book of Business (IFP and Group)
- IFP Activity History
- View Book of Business Commission Data (IFP and Group)
- 51-100 Group New and Renewal Quoting (Group)



Aristotle Ibay,
Health Net
*We give you more ways
to fuel sales.*

Group Business

1 Search options

Choose your search option to view your group client status.

- Group name
- Parent group ID
- Group suffix ID
- Status (use drop-down menu)
- Alert type (use drop-down menu)
- OED (official enrollment date)
- Renewal date
- Plan name
- Plan type (use drop-down menu)

2 At any time, you can select this icon to save your search results directly into a Microsoft Excel file.

3 At any time, you can select this icon to print your search results.

4 Select this link to download an Excel spreadsheet containing the subscriber details for *all* active subscribers in *all* group suffixes tied to the parent group. You can then sort/save/print the data.

5 Alerts legend helps you understand what each of the Alert icons means.

6 Selecting the plus (+) icon on the parent group will expand to show you the group suffixes.

Search results

Sort your results based on your business need – by group name, parent group ID, group suffix ID, OED, renewal date, status – whatever you prefer.

7 Group Details tab

Your search results come up quickly and are easy to read. Then just click on a group name to get the demographic detail for each group. The group details tab includes:

- Group number
- Group administrator
- Group administrator and billing addresses
- Group state
- Cancellation date
- Group status
- Active subscribers/members
- Cancelled subscribers

Groups

Home > Broker > Book of Business & Commissions > Groups

MY DASHBOARD | BOOK OF BUSINESS & COMMISSIONS: Review your list of clients and information. | CUSTOMER STATUS & ACTIVITY | SALES TOOLS & QUOTING | CONTRACTING, CERTIFICATION & SUPPORT

Individuals & Families | **Groups** | View Commissions

Groups
Search Within Book of Business Your Groups Plan

Choose a search criteria and enter the appropriate search terms you are looking for.

1 Current Search Filter

Status: Active

Group's Name: Official Enrollment Date: To:

Parent Group ID: Renewal Date: To:

Group Suffix ID: Plan Name:

Status: Active Plan Type: Select...

Alert Type: Do not filter by

2 **3** **4**

5 What do the Alert Icons mean?
To make it easier to quickly scan Alerts, Health Net has introduced icons to represent alert types.

- Individual or Group has **Termed**.
- This subscriber may have had a rate **Increase** within the last 60 days.
- Individual or Group is **Delinquent**. Future payment may be scheduled; hover over the \$ icon for this Individual or Group for more info.
- Group is up for **Renewal** within the next 60 days.
- Individual or Group will terminate within 90 days.

Note: Alerts are current as of 04/08/2014.

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Group Name	Parent Group/Group Suffix	Plan Name	Enrollment Date	Renewal Date	Status	Broker ID	Alerts
GROUP ONE-A	A0001A	CA PPO 30/60/5000/0/0% GF+	01/01/2012	09/01/2013	Active	CABRKR	\$
GROUP TWO-A	A0002A	CA PPO 30/60/5000/0/0% GF+	01/01/2012	12/01/2012	Active	CABRKR	\$

Note: The oldest Original Effective Date is 01/01/2011.

6 **7** Group Detail: GROUP ONE-A

Group Details | Billing / Renewal Information

Contact Information		Group Status	
Parent Group Name	GROUP ONE-A	Group Status	Active
Suffix Name	GROUP ONE-A	Active Subscribers	0
Group Number	A0001A	Active Members	0
Group Admin	JOE ADMIN	Cancelled Subscribers	0
Group Admin Address	123 THIRD ST LOS ANGELES, CA 90010	Group SIC Code	1234
Group Phone Number	(222) 555-1212	Rating Type	C
Group State	CA	Key Dates	
Broker Firm ID / Firm Name	CABRKR / JOE BROKER	Original Effective Date	01/01/2012
		Parent Group Effective Date	01/01/2012
		Suffix Effective Date	01/01/2012
		Cancellation Date	

Note: Life products are not shown in the plan options.

8 View Subscriber List

Click on *View Subscribers List* to see all of the group's subscribers. Then click on the subscriber's name to view their details, including their dependents.

Group Detail: GROUP ONE-A

VIEW SUBSCRIBERS LIST [Download Subscribers List as an Excel Sheet](#)

Group Details | Billing / Renewal Information

Contact Information | Group Status

Parent Group Name PARENT GROUP A000 | **Group Status** Active

Suffix Name PGA000 | **Active Subscribers** 0

Individuals & Families | Groups | View Commissions

RETURN TO MAIN PAGE

Subscribers

Book of Business Subscriber information is available below. To view details for a given Subscriber, including dependent information, please click on a Subscriber name.

You can modify your search by entering or changing values below and clicking Submit.

Subscriber's Name:

Subscriber ID:

Plan Name:

Plan Type:

Status:

Showing 1 - 4 of 4 Groups Go to page 1 of 1

Subscriber Name	Subscriber ID	Plan Type & Name	Status	Notes
PAPA BEAR	R0000ABC1	SMALL BUSINESS PLANS - NP EXCELCARE/SILVER - NG SBG Silver EOA 20 Standard (Matches 8)	Cancelled	
MAMA BEAR	R0000ABC2	SMALL BUSINESS PLANS - NP EXCELCARE/SILVER - NG SBG Silver EOA 20 Standard (Matches 8)	Cancelled	
BROTHER BEAR	R0000ABC3	SMALL BUSINESS PLANS - NP EXCELCARE/SILVER - NG SBG Silver EOA 20 Standard (Matches 8)	Cancelled	
BABY BEAR	R0000ABC4	SMALL BUSINESS PLANS - NP EXCELCARE/SILVER - NG SBG Silver EOA 20 Standard (Matches 8)	Cancelled	

Subscriber Details: PAPA BEAR

VIEW SCHEDULE OF BENEFITS

(See below for Dependent Details)

Contact Information		Plan Details	
Subscriber Name	PAPA BEAR	Plan Name	NG SBG Silver EOA 20 Standard (Matches 8)
Subscriber ID	R0000ABC1	Plan Type	SMALL BUSINESS PLANS - NP EXCELCARE/SILVER
Physical Address	123 BIG TREE ROAD	Status	Cancelled
County	LOS ANGELES	Rating Region	NP9
DOB	5/6/90	CAL COBRA ?	No
Home Phone #	(555) 543-1234	FED COBRA ?	No
Work Phone #	(555) 345-2222		
Language Indicator (spoken)	ENGLISH		

Dependent Details: PAPA BEAR

Name	Relation	Physical Address	DOB	Age	Status	Mhr Fff Date	OAD
PAPA BEAR		123 BIG TREE ROAD	5/6/90	24	Cancelled	12/01/10	No

9 Billing / Renewal Information tab

Click this tab to find payment information, including:

- Due date
- Amount due
- Balance due
- Last paid date
- Last payment made
- Current premium (shown at a group suffix level)
- Original effective date (OED)
- Waiting period

Group Detail: GROUP ONE-A \$

Group Details 9 Billing / Renewal Information

Payment Details		Renewal Details	
Balance Forward (Prior Balance)	\$0.00	Current Amount (Premium)	\$961.30
Current Period Amount Due	\$961.30	Renewal Month	September
Adjustments	\$0.00	Group Last Renewal Date	09/01/2012
Payments	\$0.00	Group Billing Address	123 THIRD ST LOS ANGELES, CA 90010
Balance Due ?	\$961.30	Billing Contact Phone Number	(222) 555-1212
Due Date Of Current Bill	07/01/2013	Enrollment	
Last Payment Made	03/07/2013	Waiting Period Non- Management	First Of Month AFTER HIRE DATE
Last Payment Amount	(\$961.30)	Waiting Period Management	First Of Month AFTER HIRE DATE

Delegate various levels of access to brokers registered under your firm's ID

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- 51-100 Group New and Renewal Quoting (Group)



Vicki Major,
Health Net

*We create solutions that
work for your business.*

Don't Wait.



Call your Health Net representative today for more information about our Broker Book of Business tool available at www.healthnet.com. It's one more way Health Net continues to make doing business with us even easier!

Not registered?

Go to www.healthnet.com/broker and click on *Register* to set up your secure user account.

Once registered, start using the Broker Book of Business tool and all of the useful services available at www.healthnet.com.