Bentegro

Decision Tool User Guide:

Agency Setup and Management

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1 Important Things to Know

- Do not leave required fields blank. Items marked with a red asterisk (*) indicate a required field. If you do not complete a required field, you will receive an error message.

- Try to avoid punctuation marks (commas, periods, dollar signs, etc.) in any of the **required fields**.

- For example, “Boulevard” may be abbreviated as “Blvd” but not “Blvd.” with a period. Omitting punctuation marks will produce cleaner data and can eliminate error messages.

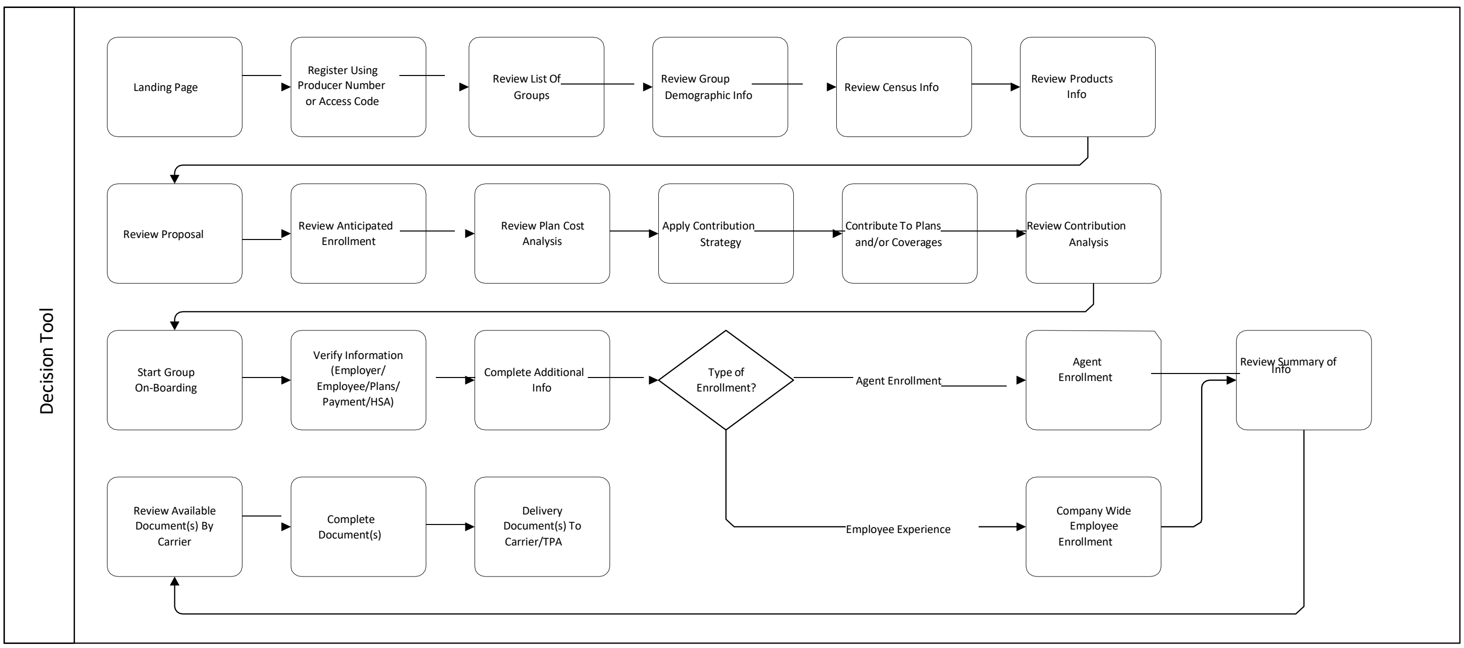
- Click on the **Logout** button in the upper right-hand corner of the screen to close the website. By using the **Logout** button, your data will be saved and secured.

- To quickly navigate through the system, you may use the **Jump To** at the top of the page.

2 Introduction

This user guide is designed to provide documentation for carriers and producers who will use this platform on a regular basis. This document will also assist in providing general knowledge of how to navigate the platform and how to properly utilize the tool. It will also include the functionality provided by the software including examples of utilization.

The Decision Tool platform guides Support Teams, Carriers, General Agencies, Agencies, and Agents around setting up and navigating their profile information. Each step within the tool allows you to cater to the needs of the group from comparing plans to setting up contributions, and employee enrollment.



3 Login Management

3.1 Registration

If you are new user to the Employer Listing Platform, you will need to register as one of the following – Carrier, General Agency, Agency, or Agent. Follow these instructions below to register your account.

Agency; *As an Agency, you can view all activity generated by Agents mapped to you.*
Agent: *As an Agent, you can view all your quotes:*

1. Click on **Producers**, and then click on **Register Now**
2. When you reach the **Create Your Account** page, under **User Type** click on the appropriate type, and then enter your
   Access code or **Carrier Producer Number** (*Agent user types*)
3. Create a username and password
4. Enter your email address, security questions and the security captcha
5. Click **Submit**

3.2 Logging In

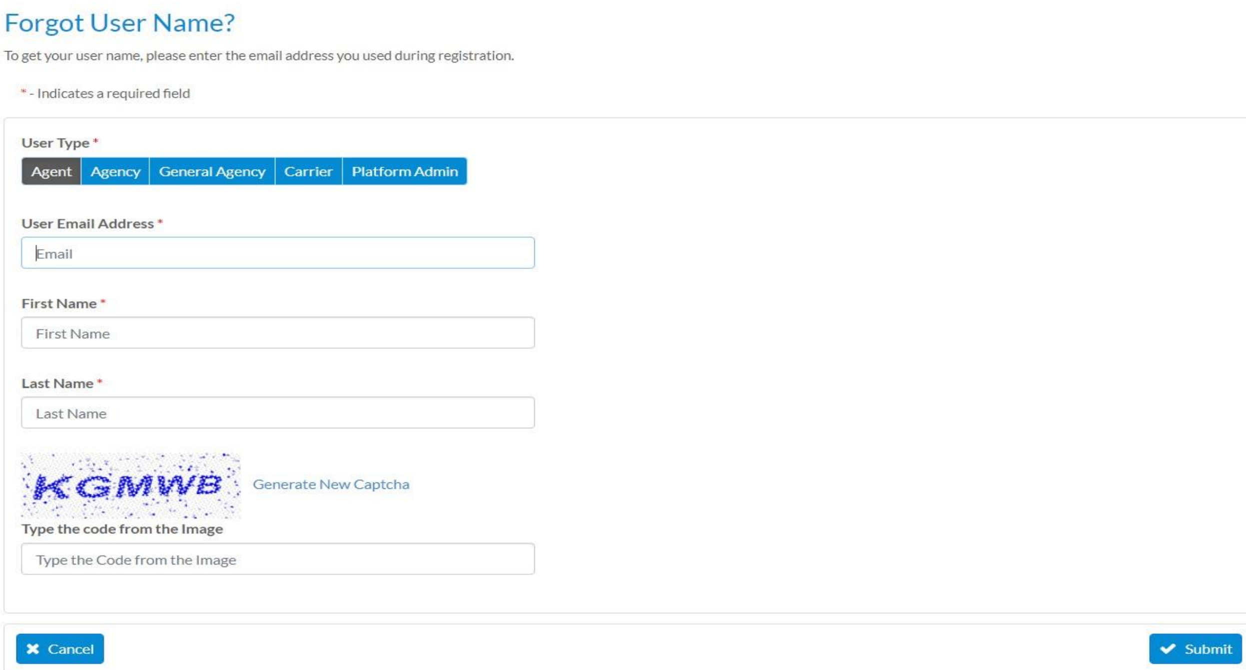
The following are easy instructions for logging in to view your information once you have registered:

1. Visit the Platform website
2. Once you reach the website, click on the **Producer** icon. This will open a section on the right for you to enter your username and password.
3. Select your user type: Agent, Agency, General Agency, or Carrier
4. Type in your login credentials and select **Login**.

3.3 Forgot Username

If you have successfully logged into the Platform in the past and forgot your username, you can use the **Forgot Username** feature on the landing page.

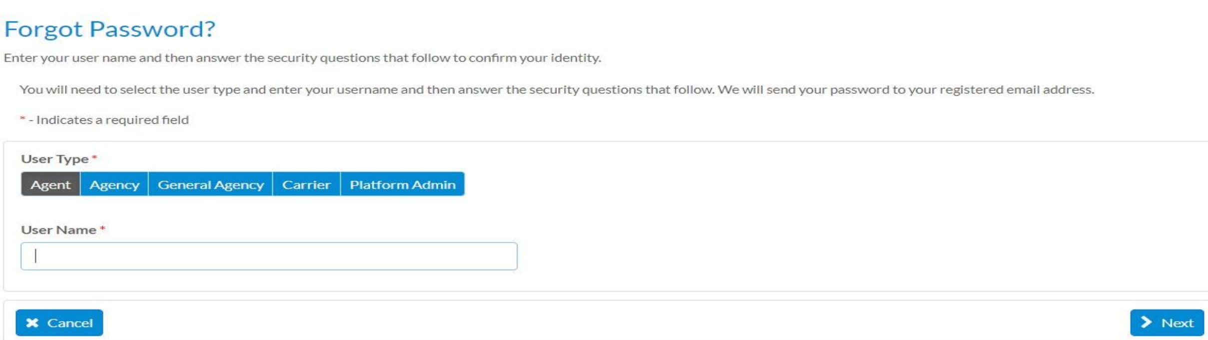
1. Login on to the **Website**
2. Click on **Forgot Username**
3. Select **User Type**
4. Enter your E**mail address, First name, Last name** and the **Captcha code.**
5. Click on **Submit**
6. An email will be sent to you with your username information



3.4 Forgot Password

If you have successfully logged into the Platform in the past and forgot your password, you can use the **Forgot Password** feature on the landing page.

1. Login on to the **Website**
2. Click on **Forgot Password**
3. Select **User Type**
4. Enter **Username** and Click on **Next**
5. Enter **Security Question** and Click on **Next**
6. Enter **New Password** and **Confirm Password**
7. Click on **Next**



4 Preferences

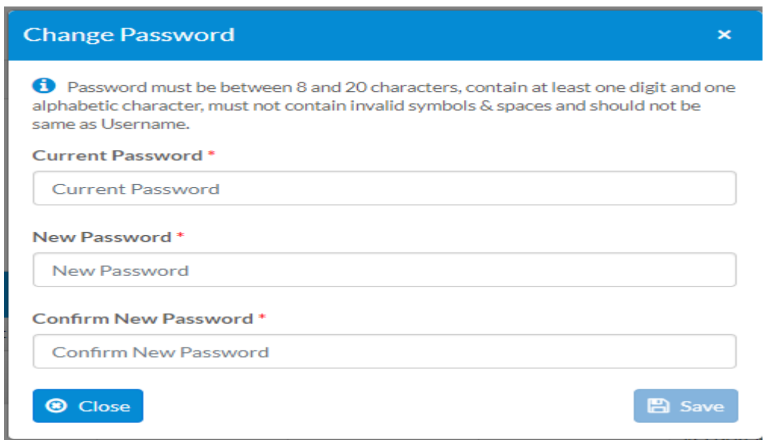
The preferences section consists of sub-menus that you would use to manage your login credentials.

4.1 Change Password

To change your password, follow these instructions:

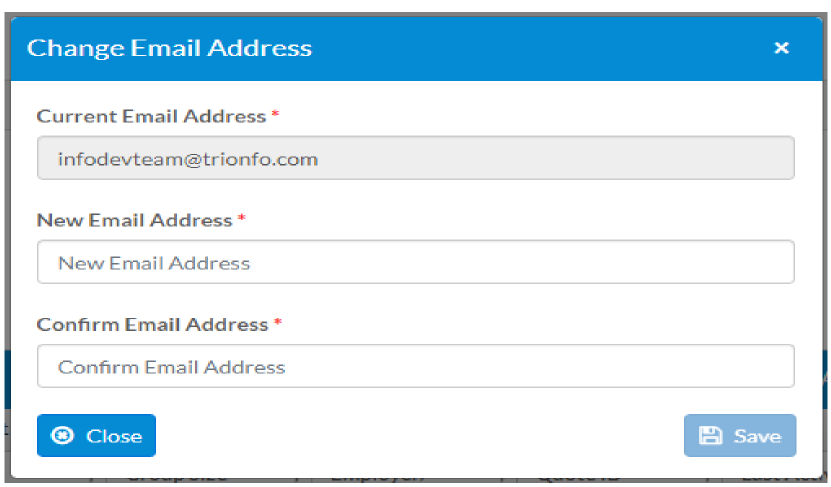
1. Enter in Current Password
2. Enter and Confirm New Password
3. Click on **Save**

If you no longer wish to change your password and would like to exit this screen, you could either click on the **X** at the top right-hand corner or click on **Close**.



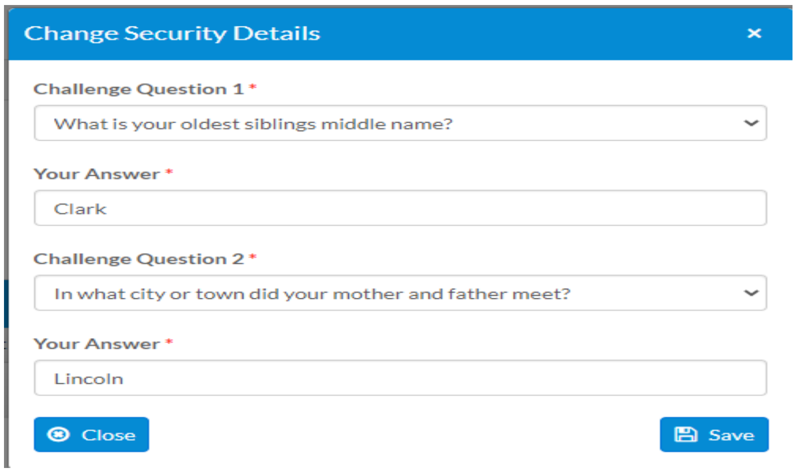
4.2 Change Email Address

1. Enter and Confirm New Email Address
2. Click on **Save**



4.3 Change Security Questions

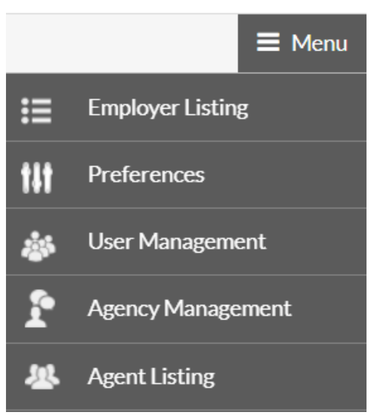
1. Select a New Question for Question 1
2. Enter in Your Answer
3. Select a New Question for Question 2
4. Enter in Your Answer
5. Click on **Save**



5 Agency Management

When logged in under an Agency account, you will have the following menu options at your disposal. To View these options, click on **Menu** at the top right-hand corner:

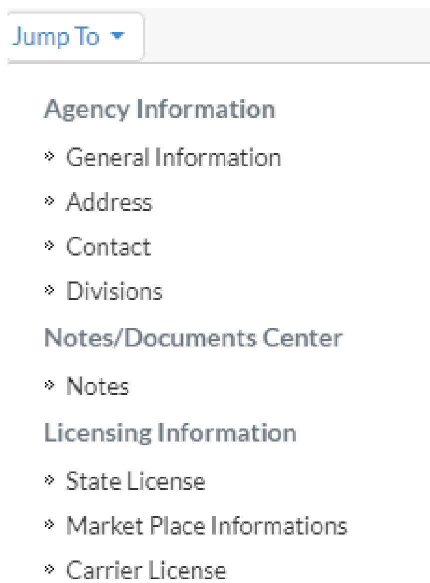
1. Employer Listing
2. Preferences
3. User Management
4. Agency Management
5. Agent Listing



5.1 Agency Information

If you would like to view and/or edit your Agency Information, Notes/ Document Center, or Licensing Information, click on Menu, then Agency Management.

On top of the page there is also a **Jump To** drop down menu that gives you access to the following sub-menus:

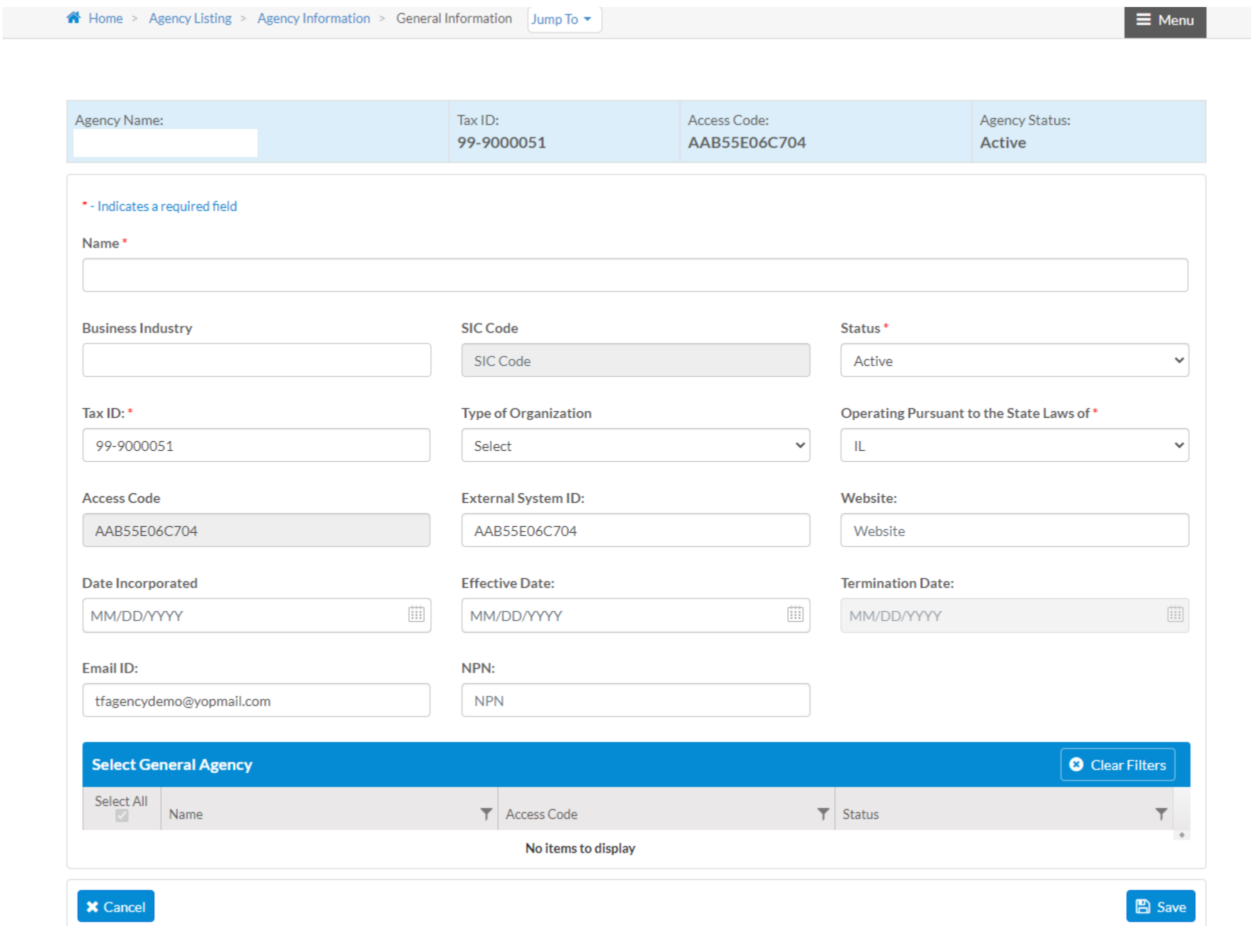


5.1.1 General Information

Click on **Menu · Agency Management · Agency Information**.

Once you arrive at this screen, you will note your Agency Name, Tax ID, Access Code, and Agency Status at the top of the page. The rest of your agency information will be listed below – should you need to make any changes you may do so on this page, then make sure to click on **Save** at the bottom of the screen.

Note: You can also access more general agency account information by utilizing the **Jump To** quick access menu at the top of the page.

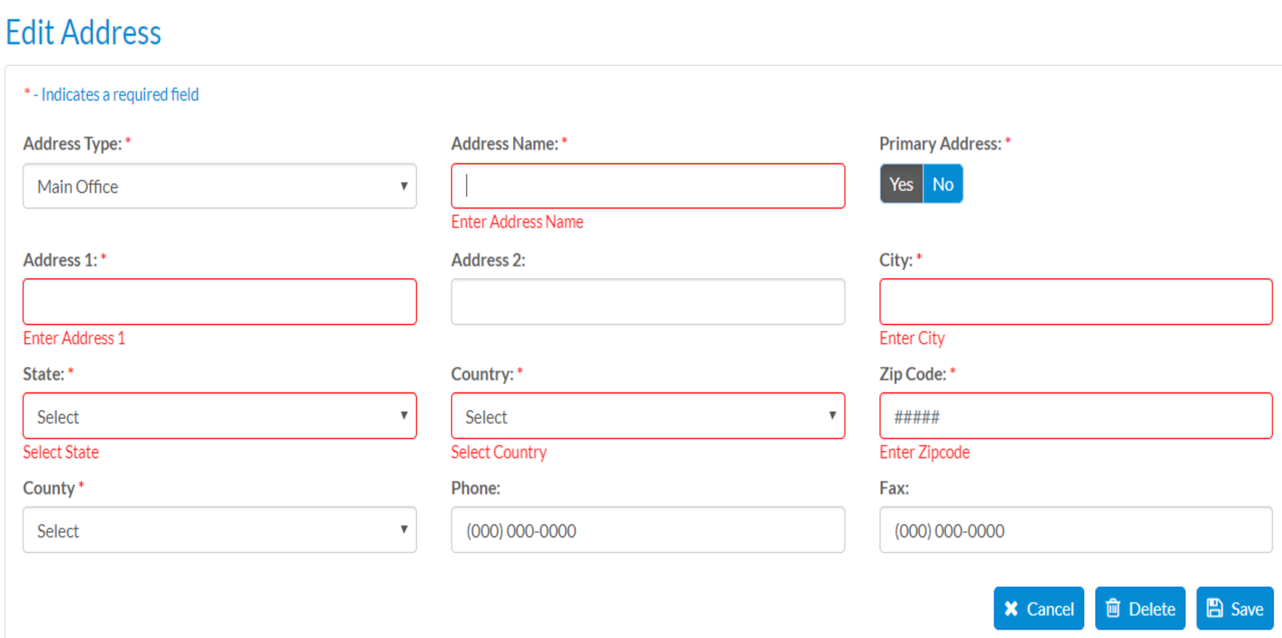


5.1.2 Address Information

This is where you enter/add/edit your agency address (es):

1. Click on **Menu**
2. Click on **Agency Management**
3. At the top of the page click on **Jump To**
4. Click on **Address** from the drop-down menu
5. Click on **+ Add Address**
6. Enter information
7. **Address Type**: select one of the following:
    a. Billing
    b. Home
    c. Main Office
    d. Mailing
8. **Primary Address**: only one (1) location may be listed as primary
9. Click on **Save** at the bottom of the right-hand screen when you have finished making any changes.

Here, you may add as many addresses as you wish and update as needed by clicking on each individual address. Your page will now look like the one below:

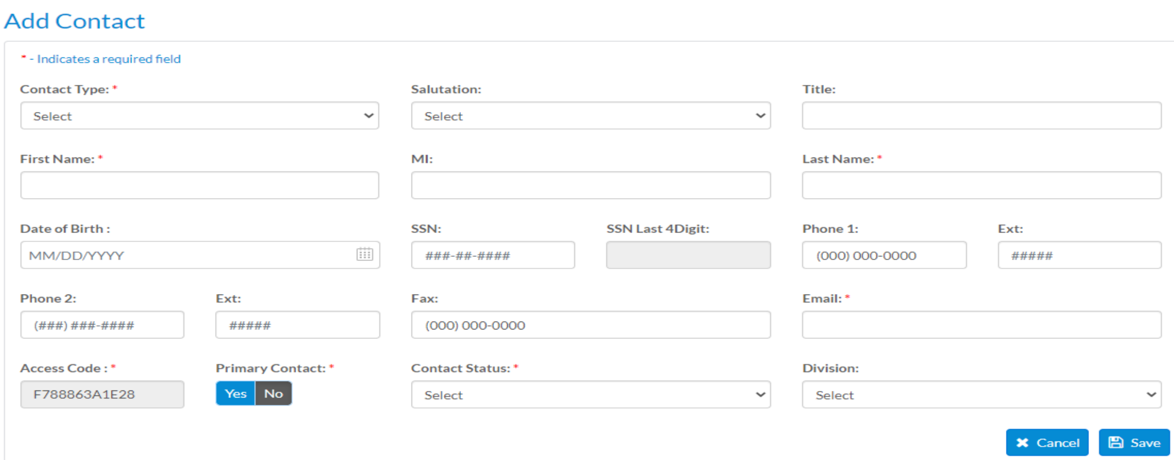


5.1.3 Contact Information

This is where you enter/add/edit your agency contact(s):

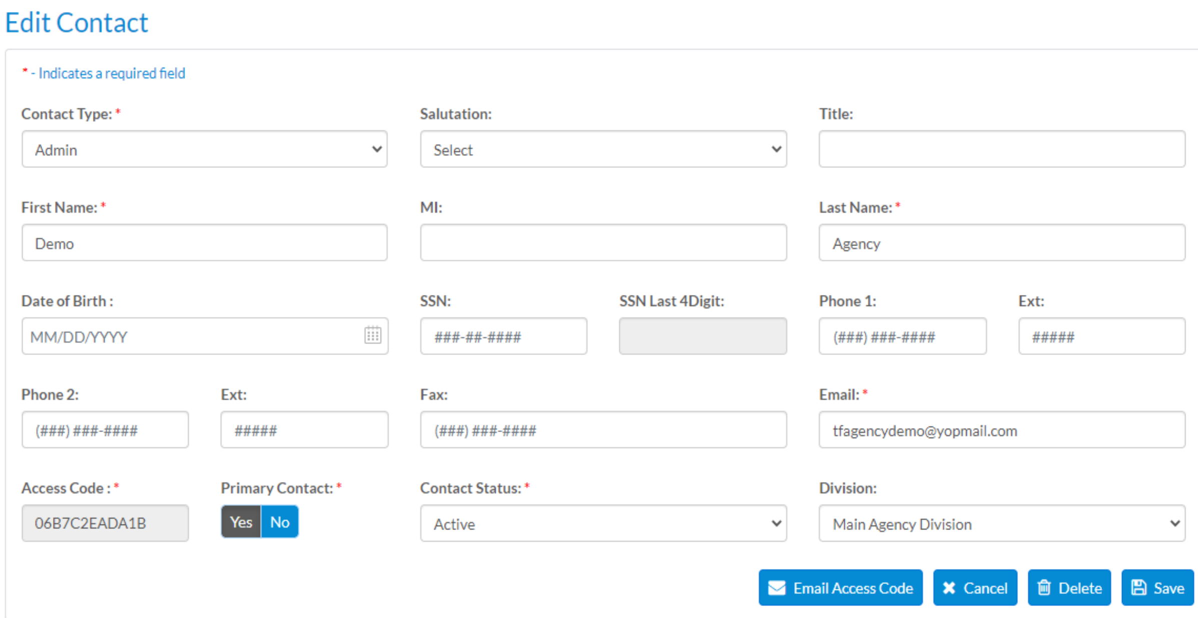
Add Contact:

1. Login on to the **Website**
2. Click on **Menu**
3. Select **Agency Management** and Click on it
4. Click on **Navigate To** (Jump To) and Select **Contact**
5. Click on **Add Contact**
6. Enter **Contact Information** (Note: Only 1 contact can be assigned primary)
7. Click on **Save**



Email Contact Access Code Information:

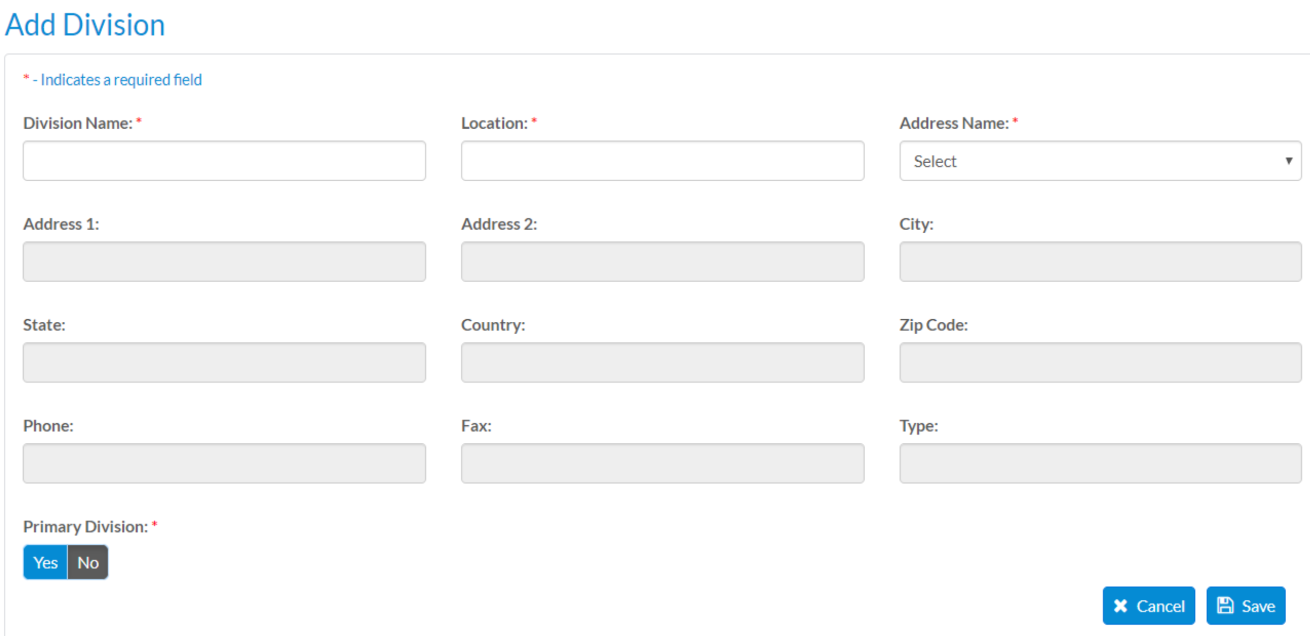
1. Login on to the website
2. Click on Menu
3. Click on Employer Information
4. Click on Navigate To (Jump To) and Select Contact
5. Click on Contact Name or Search using
6. Click on Email Access Code
7. Click on Yes, an email will be sent to the contact with their access code for them to register on the portal. See **Registration** instructions for assistance on registering.



5.1.4 Add Divisions

This is where you enter/add/edit your agency division(s). Divisions are utilized to differentiate between departments, locations, sectors, or units within your agency.

1. Go to the **Menu** at the top right corner and click on it
2. Click on **Agency Management**
3. Click on **Jump To** on the top bar and click on **Divisions**
4. Click on **+ Add Division**
5. Enter the remainder of the information
6. **Address Name**: only previously entered address can now be selected from the drop-down menu
7. **Primary Division**: only one (1) division may be listed as primary
8. Click on **Save**



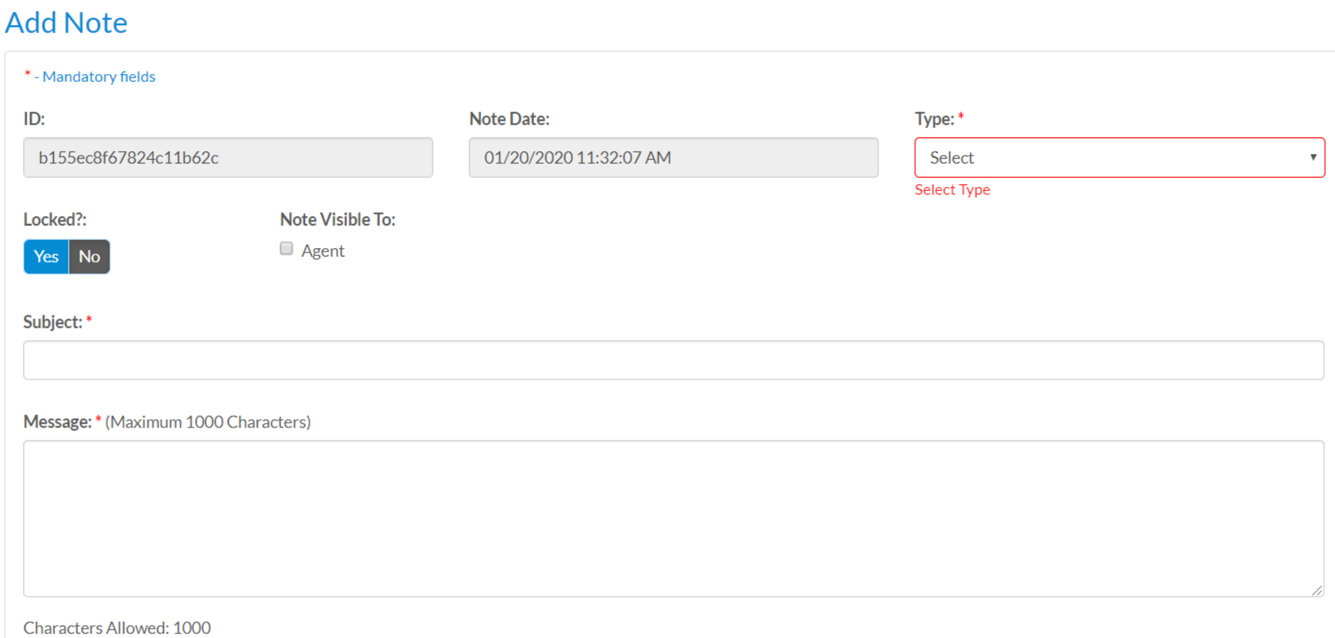
5.1.5 Notes/Document Center

Any relatable documents and/or notes may be added, viewed, and deleted on this page. To do so, click on **Menu**, **Agency Management**, then on **Notes/Document Center.**

Note: You can also access the Notes/Document Center page by utilizing the **Jump To** quick access menu at the top of the page.

If you would like to save important information, click on **+ Add Note** on the right-hand side of the screen. The **Note ID** and **Note Date** will be automatically generated for you. You will now be able to enter notes for the following type of notes:

- Note
- Phone Call
- Meeting
- To Do



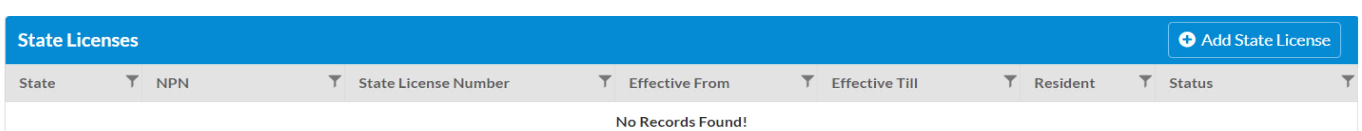
1. Click on **Type** and choose the appropriate option from the drop-down menu. Enter the rest of the information accordingly.
2. Under **Locked?** Once **Locked** is **enabled**, no changes can be made by an agent.
3. Under **Note Visible To:** when this box is checked, the agents will be able to view the note.
4. Under **Attachments**: you have the capability to add attachments to any type of note that you create.

5.1.6 Licensing Information

Go to **Menu**, **Agency Management**, then click on **Licensing Information** to view and edit all of your licenses.

Note: You can also access the Notes/Document Center page by utilizing the **Jump To** quick access menu at the top of the page.

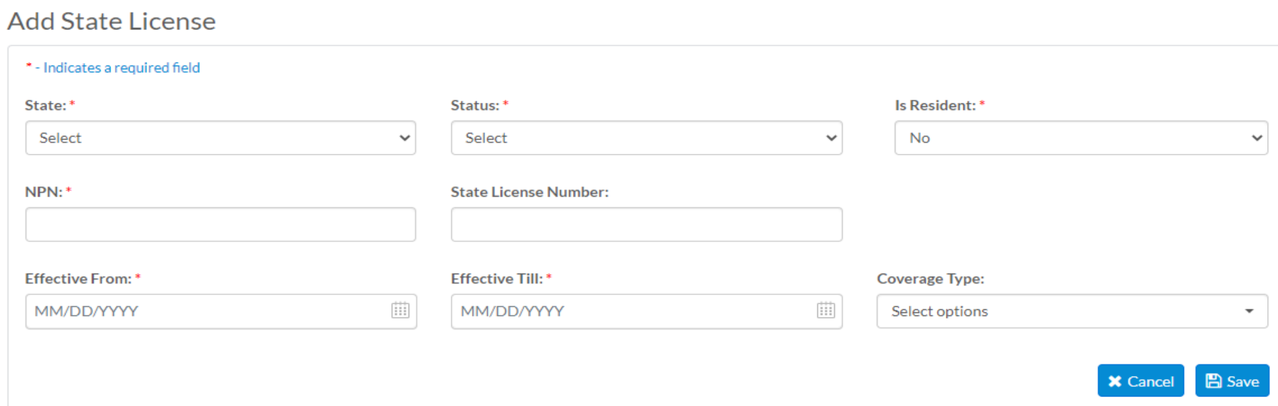
Your screen should look similar to the one below:



5.1.7 Add a State License

To add and track a license, follow these steps:

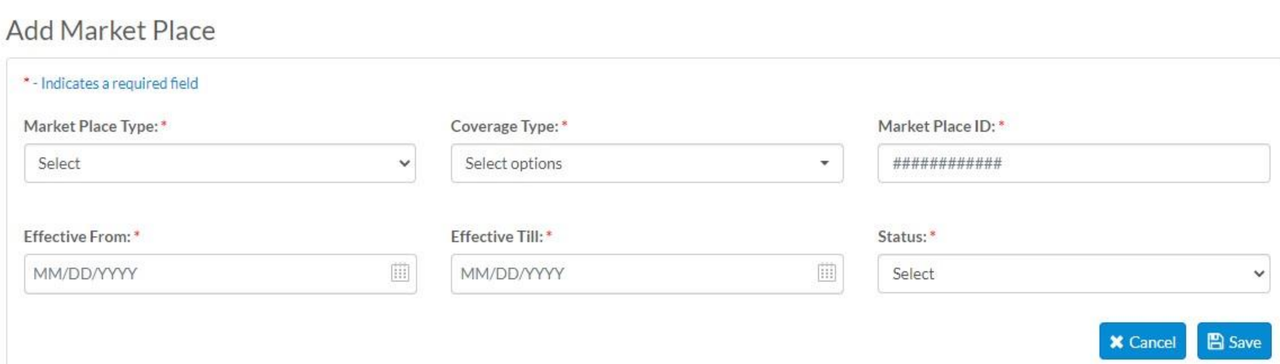
1. Go to the **Menu** at the top right corner and click on it
2. Hover over **Agency Management,** then click on **Licensing Information**
3. Click on **+ Add State License**
4. Enter the required information
5. Click on **Save**



5.1.8 Market Place Information

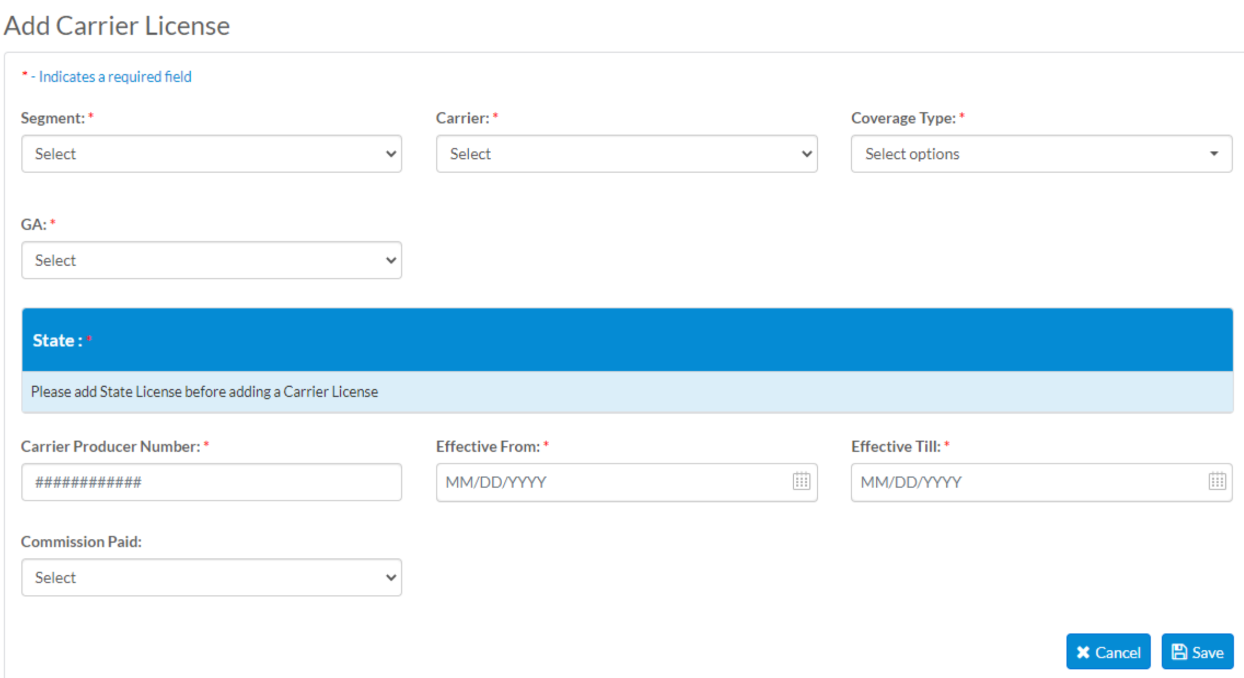
This section will allow you manage information pertaining to the agencies market place information.

1. Click on **Menu** at the top right corner
2. Hover on **Agency Management,** then click on **Licensing Information**
3. Click on **Jump To** on the top bar
4. Click on **Market Place Information** to view/add/edit your market place information.
5. Click on **+ Add Market Place**
6. Fill out the required fields
7. Click on **Save** when finished



5.1.9 Carrier License

1. Click on **Menu** at the top right corner
2. Hover on **Agency Management,** then click on **Licensing Information**
3. Click on **Jump To** on the top bar
4. Click on **Carrier License**
5. Click on **+ Add Carrier License**
6. Enter information
7. Click on **Save**

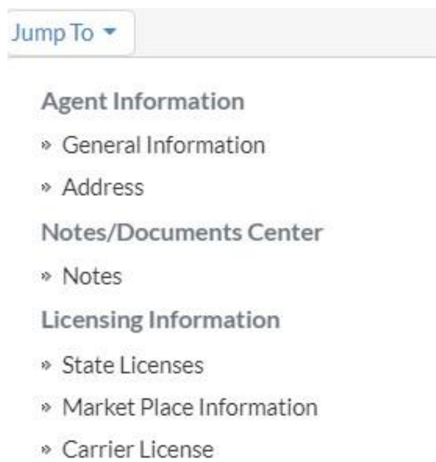


5.2 Agent Listing

To manage and edit all agents and their information under your agency, go to **Menu**, then **Agent Listing**. A list of all your agents will be displayed. Click on an agent to view/edit their address, phone, or fax number.

You may filter any of these fields by clicking on the **Funnel** icon next to each column.

Important: The **Jump To** sub-menus are specific to the agent that you have selected. The selected agent will always be displayed at the top of every page to ensure that modifications on that page are exclusively for that agent.

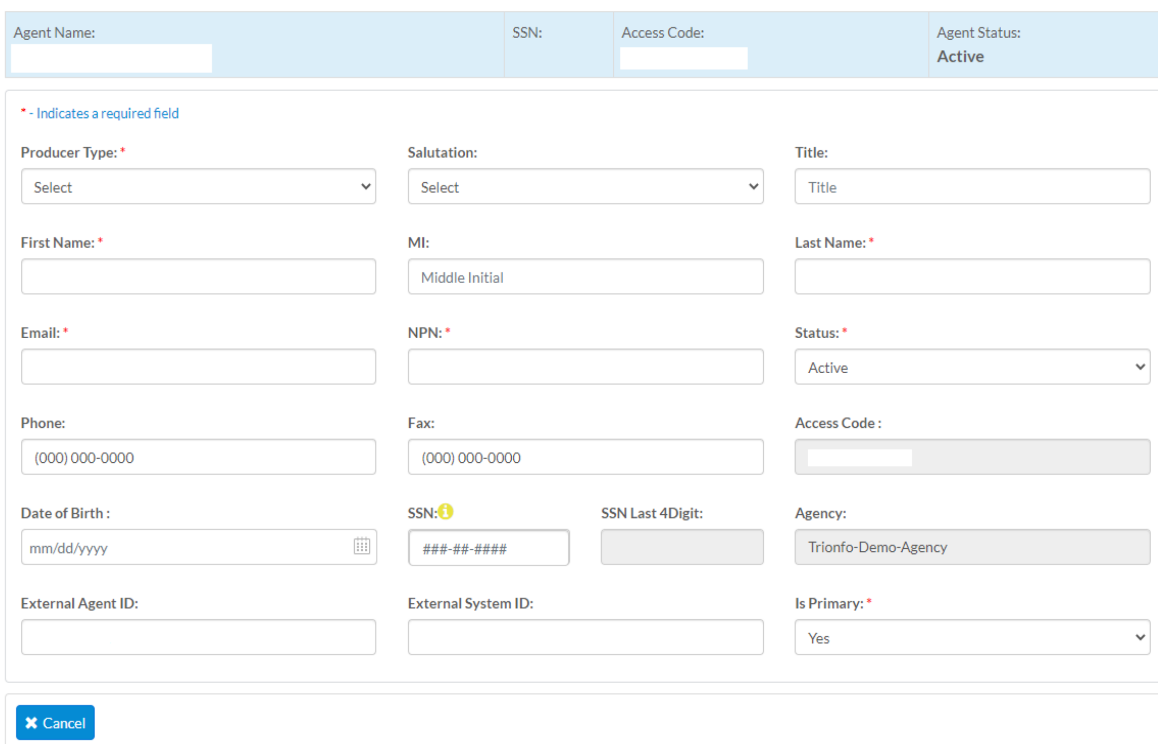


5.2.1 General Information

To arrive at this page, go to **Menu**, then click on **Agent Listing,** then select the agent that you would like to view/edit their information. Click on **Jump To** at the top, then **General Information**. The agent's information is now available for your review:

- Producer type
- Title
- First and last name
- Date of birth
- Social security number
- Phone number
- Fax number
- Email
- Access code – Automatically generated
- Status
- Agency – Automatically generated
- Eternal Agent ID
- External System ID

Remember to click on **Save** at the bottom of the screen.

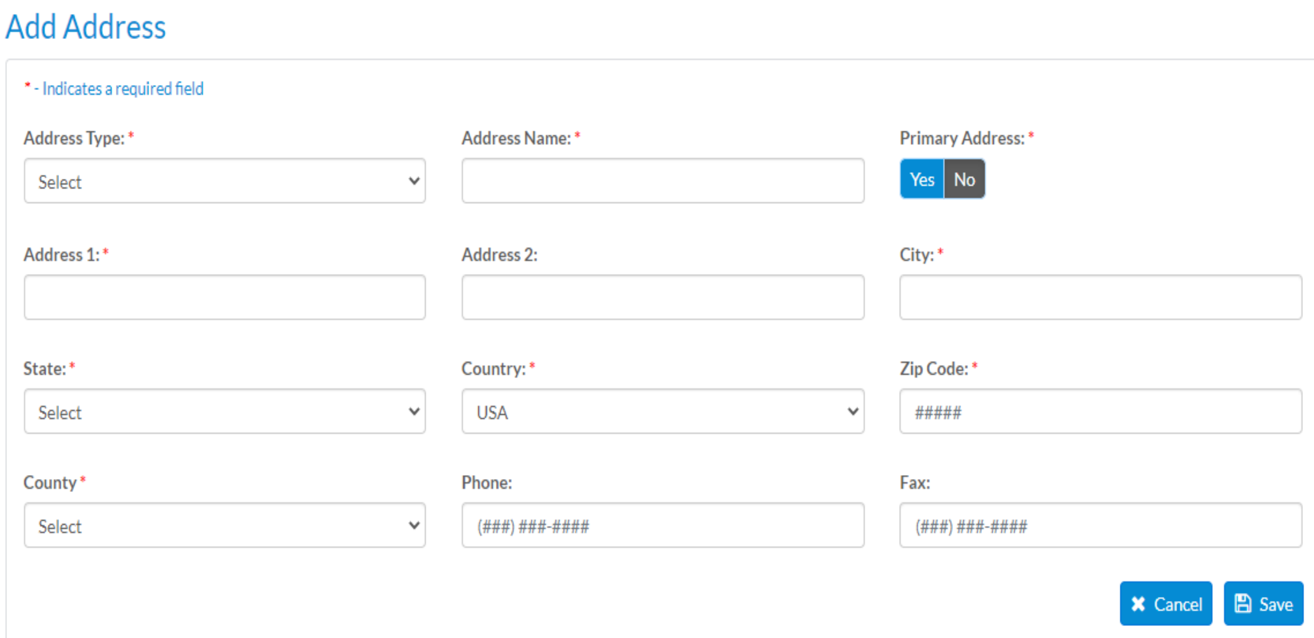


5.2.2 Address

To arrive at this page, go to **Menu**, then click on **Agent Listing,** then select the agent that you would like to view/edit their address. Click on their address to view or make any modifications.

Note: You can also access the agent's address by utilizing the Jump To quick access menu.

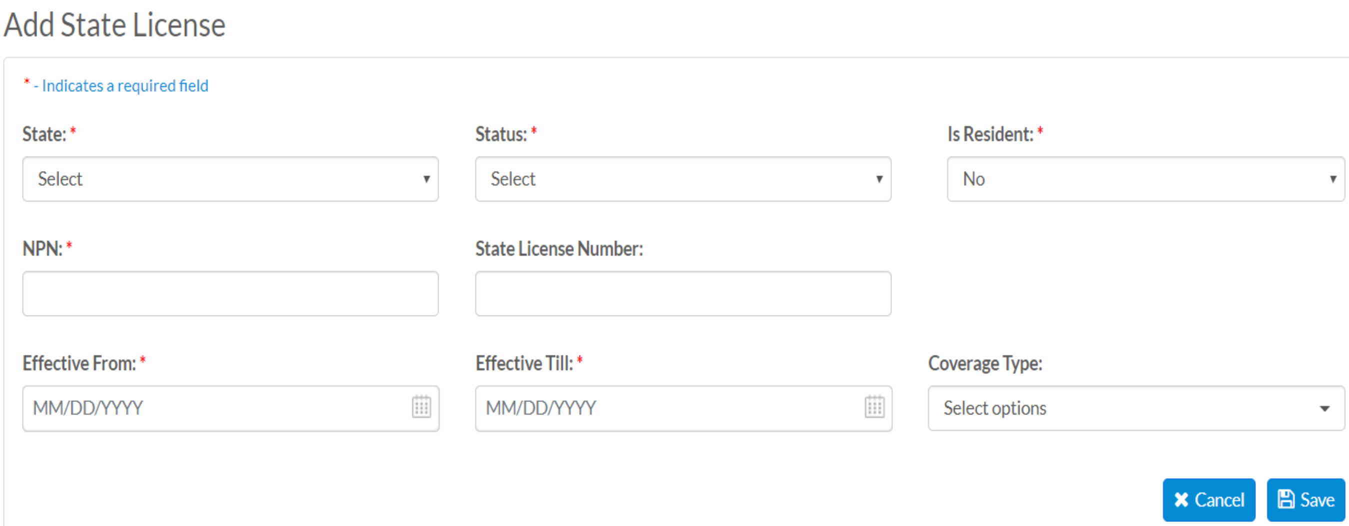
Keep in mind that only one address may be listed as **Primary Address.** Click on **Save** at the bottom of the right-hand screen if you made any changes.



5.2.3 Add a State License

To add and track an agent license, follow these steps:

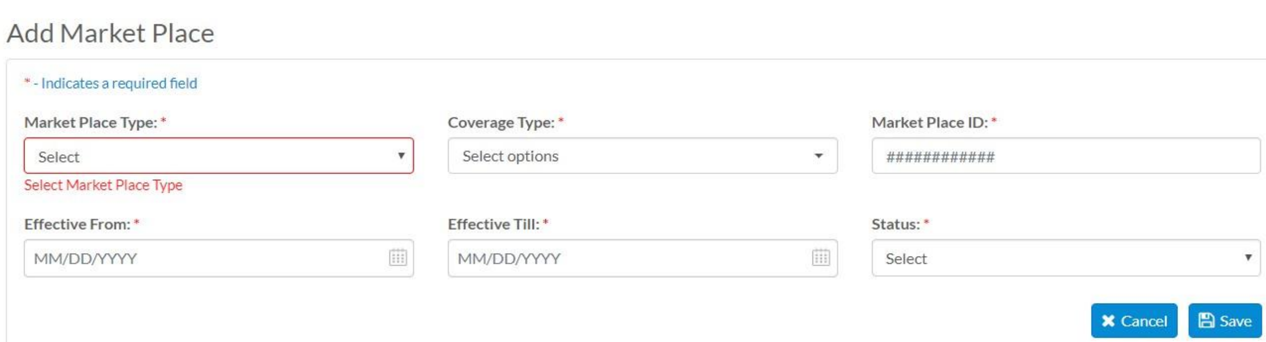
1. Go to the **Menu** at the top right corner and click on it
2. Click on **Agent Listing**, then select the agent
3. Click on **Jump To** on the top bar and click on **State License** under Licensing Information
4. Click on **+ Add State License**
5. Enter the required information
6. Click on **Save**



5.2.4 Market Place Information

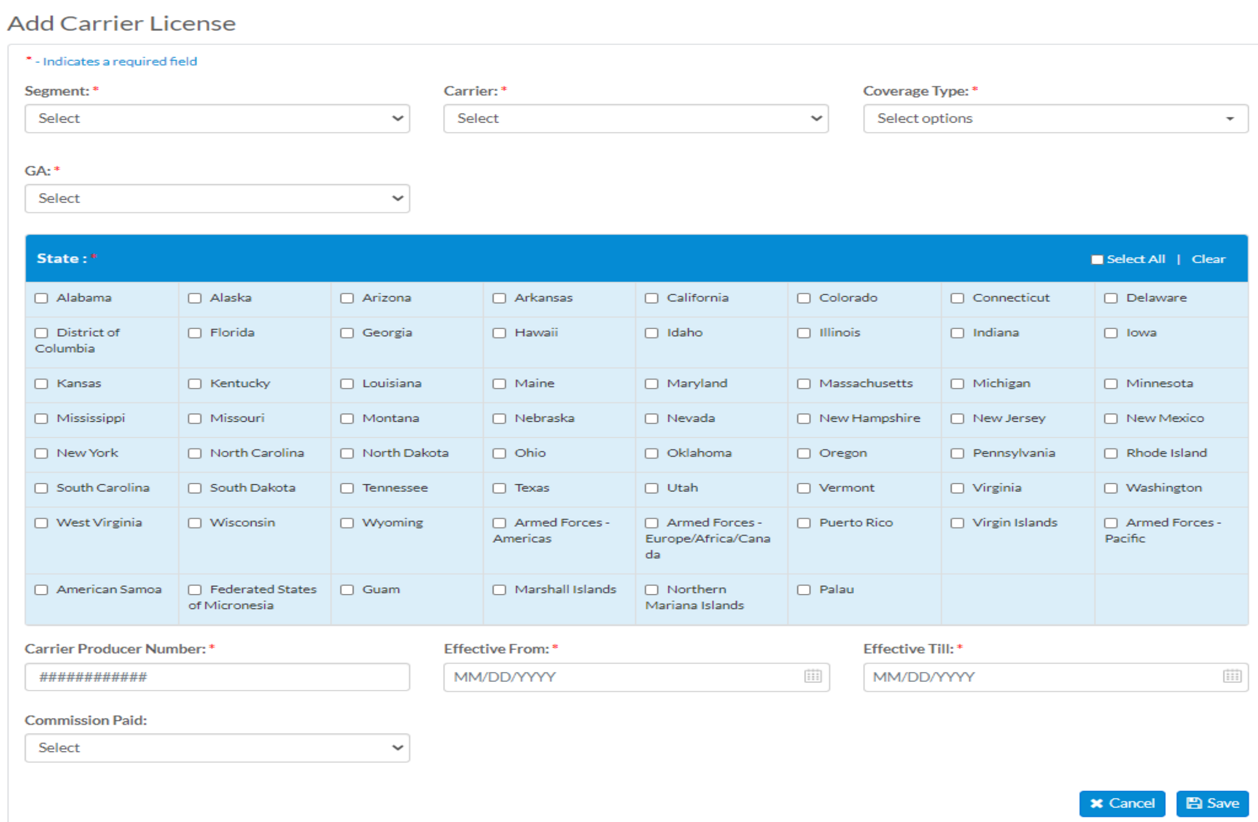
This section will allow you manage information pertaining to the agencies market place information.

1. Click on **Menu** at the top right corner
2. Click on **Agent Listing,** then select an agent
3. Click on **Jump To** on the top bar
4. Click on **Market Place Information** to view/add/edit your market place information.
5. Click on **+ Add Market Place**
6. Fill out the required fields
7. Click on **Save** when finished



5.2.5 Carrier Licenses

1. Click on **Menu** at the top right corner
2. Click on **Agent Listing,** then select an agent
3. Click on **Jump To** on the top bar
4. Click on **Carrier License**
5. Click on **+ Add Carrier License**
6. Enter information
7. Click on **Save**



6 User Management

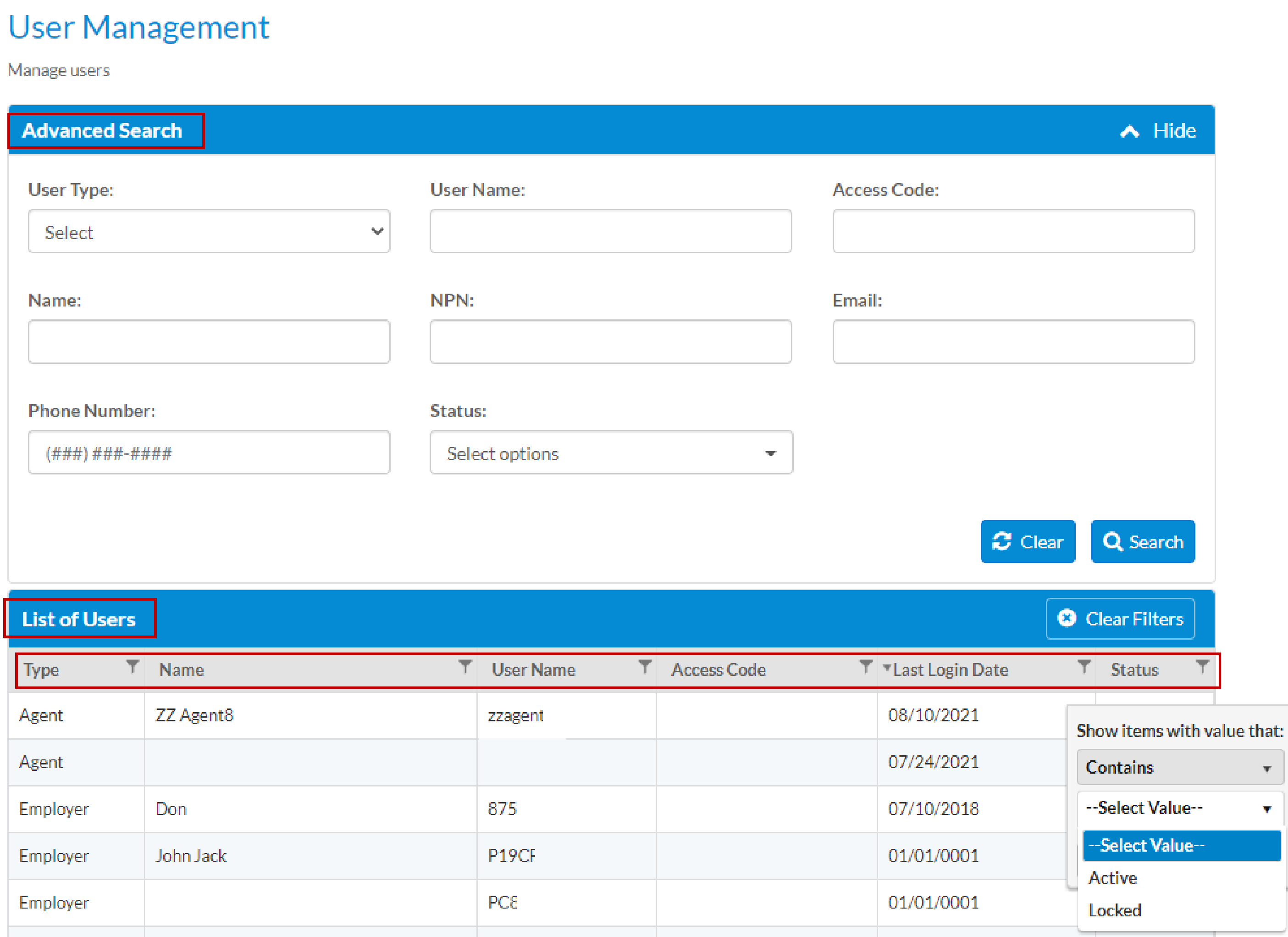
6.1 Overview

When logged in under an Agency, General Agency, or any user other than an individual Agent, you will have access to view and manage **registered** Users tied to your Agency. To view this screen, click on **Menu** at the top right-hand corner to navigate to **User Management**. It is important to know, **only** the users that have **registered** for the platform will be listed (See Login Management Registration for more details).

6.1.1 Search and Filter Users

This screen will have an **advanced search** tool and a listing of all your registered users. Use the advanced search to locate specific types of users, or an individual user by entering search criteria in the user type, name, NPN, email etc. fields.

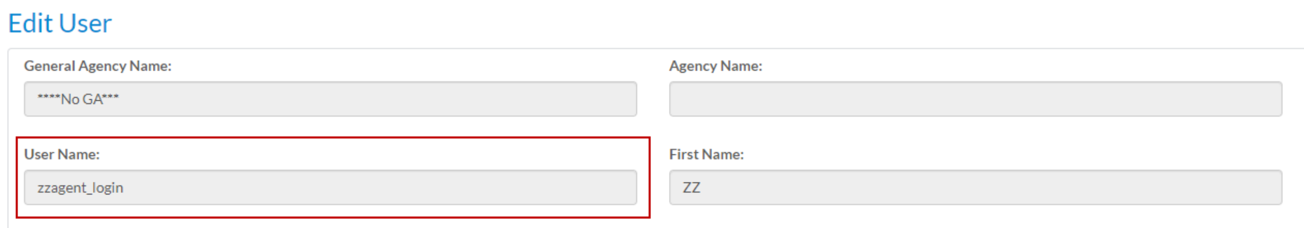
The **List of Users** below contains columns that also include a filter icon for multiple ways of searching for a group. For example, you may want to filter all of your current active users by clicking the funnel icon next to 'Status'. Your screen will look like the one below:



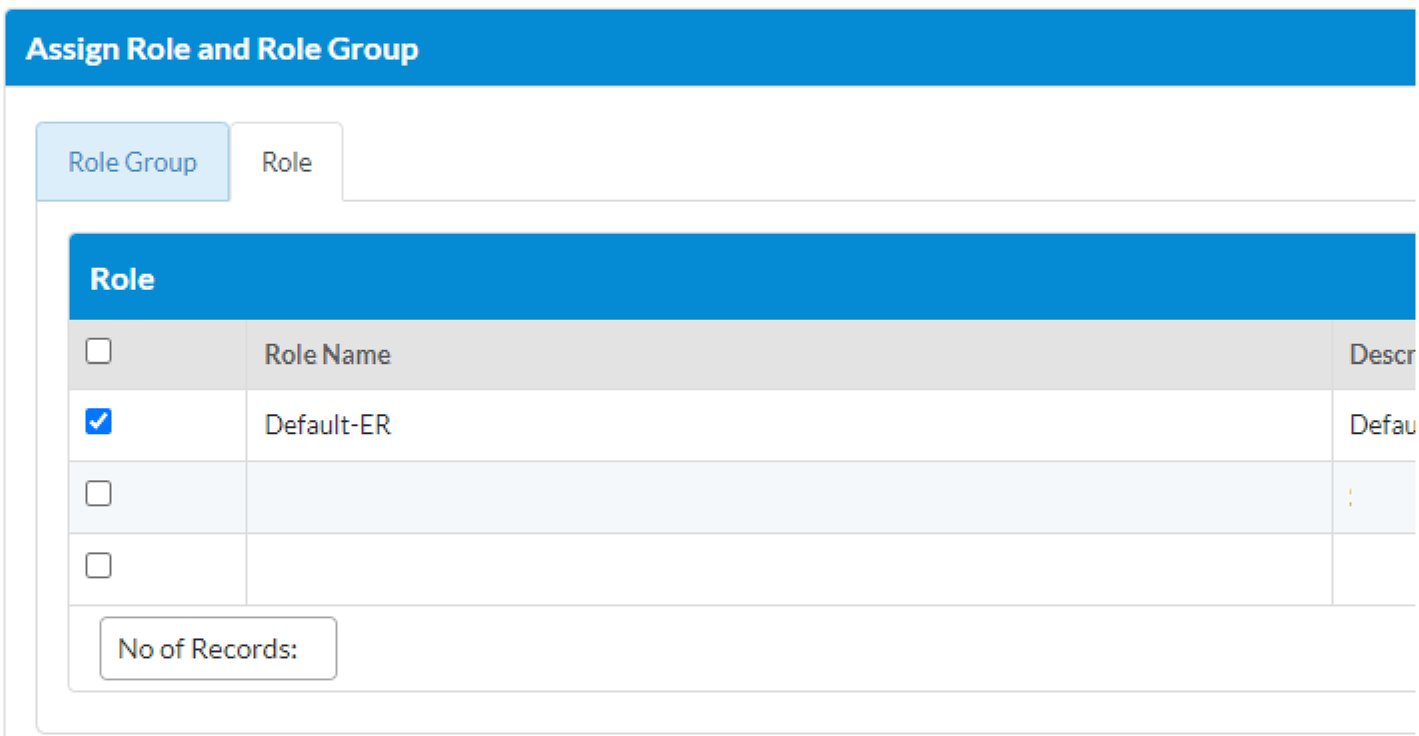
6.1.2 Manage User Roles and Security

Selecting a user in the List of Users section will expand a new set of actions you can take with a registered user. You will be able to view their **Username,** assign roles (if applicable), view **Security Questions**, **Lock** the user, and **Reset Password.**

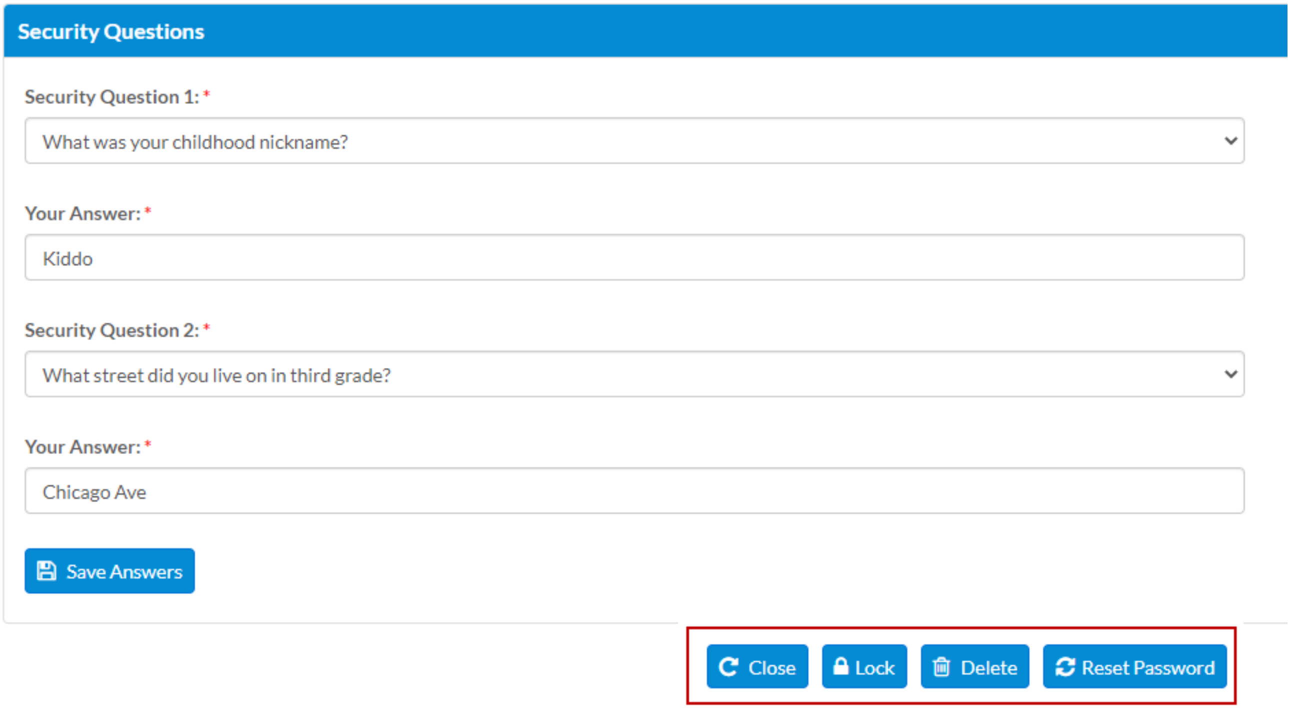
View User Information: Clicking the user will display their Demographics, Username, Status, and Access Code.



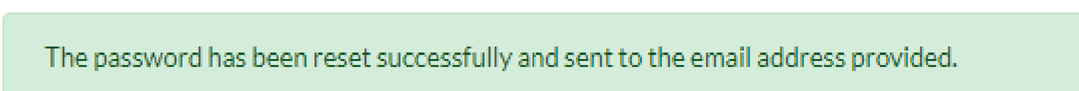
Assign Role and Role Group: If applicable, you may have role groups or individual roles you can assign. To assign these to a registered user, Click the Role Group or Role tab, select or deselect the role, and click **Save.** The user will now have new functionality, or the functionality will be removed immediately (it does not matter if user logs out or logs in).



Account Security:



- **Security Questions:**
  - This displays the security questions the user provided when they registered. You can update these security questions if needed, or verify the identity of a user (i.e., user wants to recover their account due to lost password).
- **Lock/Unlock User:**
  - You can lock and unlock the selected user account to prevent the account from logging into the platform entirely (i.e., terminated employee, stolen identity, etc.). Clicking the lock button will prompt a window asking you to confirm if you want to lock the user account. The user status will change to 'Locked' and when you select the user the button will now allow you to unlock the user if needed.
- **Reset Password:**



  - Resetting a user's password will make their current password obsolete, and the system will send an email to the user with their new system generated password. The system will prompt you to confirm you wish to do this when you click Reset Password.
  - **Tip:** There is also a **Forgot Password** (covered in the Forgot Password section of this guide) self-service action the user can take on the Login Screen.
- **Delete User:**
  - It is recommended you lock a user as opposed to deleting a user account. It is important to know this action will not delete the actual Agent, Agency, etc. This action will delete the registration profile the user setup (i.e., username, password, etc.)