1. To find a policy for an individual or a group, click “Policies”

2. If you’re searching for a specific person, type their information in, here. Otherwise, press Search to populate all of your members’ policies.

3. Select the Policy you want to view by clicking “View/Edit”

4. Scroll to the bottom of the policy screen and click “View Details” Then click on the member’s name that is underlined under “Member Name.”
5. Click on the member’s name will take you to a screen where you are able to edit demographics for an off-exchange member.

Select a reason for the change.

6. Click Submit when changes are finalized.