

# JET Insure Broker Portal Training Guide 11: Demographic Changes Small Group

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.

**Account**

- Contacts
- My Quotes
- Individual Applications
- Small Group Applications
- Policies ←
- Renewals
- IFP Marketplace Renewals

Home ▶ Search

▶ Policy Search

Product: All

Issuer Subscriber ID:

Exchange Subscriber ID:

Policy Name:

DCN Number:

Effective Date From:  MM/DD/YYYY

Effective Date To:  MM/DD/YYYY

First Name:

Last Name:

Agent:

Date of Birth:  MM/DD/YYYY

Group Type: All

Platform: All

Email Address:

Plan Type: All

Status: All

Search Results								Rows / Page: 10	Maximum Rows: 100
Issuer Subscriber ID	Exchange Subscriber ID	Policy Name	Product	Agent	Effective Date	Expiration Date	Status	Group	
<div style="border: 1px solid #ccc; padding: 5px; display: inline-block;">View/Edit</div>									

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

<a href="#">View/Edit</a>	Group name	Exchange Sub ID	Group Name	Individual Health Policies	Agent/ Agency	1/1/2020 12:00:00 AM	12/31/2020 12:00:00 AM	Active
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4. The Small Group dashboard will appear. To make changes to specific employees within the group, click on employee roster, then “view roster”

Dashboard Manage Group Employee Roster Profile & Settings Classes Billing Help Material Back to Policy Search

**Participation**

Total Employees	Eligible	Covered	Waived	Participation 100%
2	2	2	0	

This group has entered the grace period due to non-payment of the premium amount. PTD: 04/30/2020

Notes

Dashboard Manage Group Employee Roster Profile & Settings

**Employee Roster**

View Roster Add Employee Enrollment History

Last Name:

SSN:

Status:

+ Add Employee | Print

5. Click on the employee's name that you wish to edit.

Issuer Subscriber ID	Employee Name	Coverage Type	SSN	Status	Effective Date	Termination Date	Monthly Premium	Contribution
ID Number	<a href="#">Linked employee name</a>	Employee	SSN	Covered	12/01/2019	N/A	\$528.80	\$264.30

6. The employee's profile will then be available for editing when you click "edit profile."

Employee Profile

name

Demographics

Last Name: name, First Name: name, Middle Initial: , Suffix:

Gender: Male, Date of Birth: DOB, SSN: SSN, Coverage Type: Employee

Employee Status: Existing Member, Coverage Status: Covered, Hire Date: , Marital Status: Not Specified

Average Working Hours: 50

Coverage

Benefit Plan: Evision Aurora Bellin Thede, Coverage Start Date: 12/1/2019

Contact Information

Work Phone: , Mobile Phone: phone, Email: , Preferred Method of Contact: --Select from List--

Home Phone: phone

Address Information

Address Type	Street Address	Apt/Suite #	State	City	County	Zip code	Same as Corporate
Physical	Address						
Mailing							

From here, you can change all demographic information including address and coverage status.

You can also add or remove dependents from this screen.

Dependent(s)

+ Add Dependent

Name	Member ID	Gender	Date of Birth	Age	Relation	Coverage Status	Effective Date	Termination Date	Monthly Premium
No dependents exist.									

Notes

Add Note

Note ID	Created Date	Created By	Comment	Status	Priority	Assigned To
No record found.						

Back Submit

When you are finished, click "submit"