








# JET Insure Broker Portal Training Guide 12: Terminate Member in a 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:

Issuer Subscriber ID:

Exchange Subscriber ID:

Policy Name:

DCN Number:

Effective Date From:

Effective Date To:

First Name:

Last Name:

Agent:

Date of Birth:

Group Type:

Platform:

Email Address:

Plan Type:

Status:

Search Results								Rows / Page	Maximum Rows
Issuer Subscriber ID	Exchange Subscriber ID	Policy Name	Product	Agent	Effective Date	Expiration Date	Status	Group	
[Empty search results table]									

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:

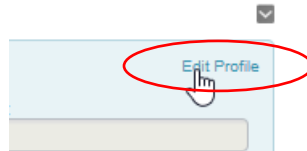
SSN:

Status:

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

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



6. To terminate the member, change the coverage status from "covered" to "Terminated"

Employee Profile

Name

Demographics

\* Last Name: Name  
\* First Name: Name  
Middle Initial:   
Suffix:

\* Gender: Male  
\* Date of Birth: DOB MM/DD/YYYY  
SSN: SSN  
Coverage Type: Employee

\* Employee Status: Existing Member  
\* Coverage Status: Terminated  
Hire Date: MM/DD/YYYY  
\* Marital Status: Not Specified

\* Average Working Hours: 50

A red arrow points to the "Terminated" dropdown menu in the "Coverage Status" field.

7. As you scroll down, it will ask for a termination reason, and you can choose one of the options provided. Click "save"

Reason

\* Reason: --Select from List--  
--Select from List--  
TERMINATE EMPLOYEE -DEATH  
TERMINATE EMPLOYEE -LEAVE OF ABSENCE WITHOUT BENEFITS  
TERMINATE EMPLOYEE -RETIREMENT  
TERMINATE EMPLOYEE -TERMINATION OF BENEFITS  
TERMINATE EMPLOYEE -TERMINATION OF EMPLOYMENT

\* Event Date: 4/20/2020 MM/DD/YYYY

Save Cancel

A red arrow points to the "Reason" dropdown menu. A red circle highlights the "Save" button.

8. At the bottom of the screen, click "next." A confirmation box will appear – see below. Press Ok.

Status	Priority	Assigned To

Back Next

A hand cursor points to the "Next" button.

once you click the Submit/Next button.

