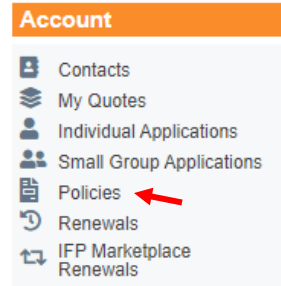


JET Insure Broker Portal Training Guide 13: Terminate off-exchange policy

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, choose “Plan Type” > Off exchange > and press Search to populate all of your members’ policies.



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 Reset Export To Excel

Search Results Rows / Page: 10 Maximum Rows: 100

Issuer Subscriber ID	Exchange Subscriber ID	Policy Name	Product	Agent	Effective Date	Expiration Date	Status	Group
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3. Select the Policy you want to view by clicking “View/Edit”

View/Edit	Member ID	Exchange Sub ID	Member 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. Scroll to the bottom of the policy screen and click “View Details”



- Member details screen will populate and give you many options for your off-exchange member. Here, you have the option to terminate the entire policy by clicking “terminate policy.”

Member Portal

- Policy Summary
- Add Dependent
- Enrollment History
- Member Invoices
- Transaction History
- Member Payments
- Payment Options
- Notifications
- View Plan Details
- View Plan SBC
- View Plan SOB
- Documents
- ID Card Request
- Communication Preferences

Enrollment Summary - Subscriber Name

Member ID	Effective Date	Monthly Plan Cost	APTC	Member Responsibility	Paid Through Date
ID number	01/01/2020	\$358.03	N/A	\$358.03	5/31/2020
Agent			Plan		
Broker name			Envision - Bronze 8150/100		

[Download Temporary ID Card](#)

Outstanding Balance: \$0.00

Member Name	Type	Member ID	Gender	Date of Birth	Age	SSN	Effective Date	Termination Date	Monthly Plan Cost	Status
name	Subscriber	ID number	gender	DOB		SSN	01/01/2020	12/31/2020	\$358.03	Covered

Coverage Information

Plan Name	Plan Type	Effective Date	Expiration Date	Line of Business	Monthly Plan Cost	APTC	Member Responsibility
Envision - Bronze 8150/100	EPO	01/01/2020	12/31/2020	Off Exchange	\$358.03	N/A	\$358.03

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Terminate Policy