








JET Insure Broker Portal Training Guide 15: Making a Recurring Payment IFP

1. To find a policy for an individual, 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
Reset
Export To Excel














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

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.” Then, along the left side of the screen under Member Portal, you can view the various payment and enrollment screens. Click “Payment Options”

Member Portal

-  Policy Summary
-  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 #	1/01/2020	\$973.74	\$837.00	\$136.74	4/30/2020

Agent: Plan: Envision - Silver 3300 CSR

Broker name: Envision - Silver 3300 CSR

You have entered the grace period due to an unpaid premium. Please pay the amount due as soon as possible. If the payment is not made by 07/31/2020, your policy will be terminated as of 05/31/2020.

Download Temporary ID Card Outstanding Balance: \$136.74

Member Name	Type	Member ID	Gender	Date of Birth	Age	SSN	Effective Date	Termination Date	Monthly Plan Cost	Status
Member Demographic and plan information										

Coverage Information

Plan Name	Plan Type	Effective Date	Expiration Date	Line of Business	Monthly Plan Cost	APTC	Member Responsibility
Envision - Silver 3300 CSR	EPO	01/01/2020	12/31/2020	Exchange	\$973.74	\$837.00	\$136.74

Back

- The member's payment screen will appear with various payment options. To make a recurring payment, use the bottom part of the screen. You should view the accurate member ID, Name, Due Date and amount for the payment. For members that are not delinquent, the outstanding balance, should be their monthly responsibility. If the member has gone into grace period, the outstanding balance will be the total amount due.

Member Portal

- Policy Summary
- Enrollment History
- Member Invoices
- Transaction History
- Member Payments
- Payment Options
- Notifications
- View Plan Details
- View Plan SBC
- View Plan SOB
- Documents

Subscriber Name

Member ID	Effective Date	Monthly Plan Cost	APTC	Member Responsibility	Paid Through Date
ID	01/01/2020	\$973.74	\$837.00	\$136.74	4/30/2020

Agent: Plan
Broker name: Envision - Silver 3300 CSR

Payment Options

- One Time Payment

Scroll down

Set Up Recurring Payment

Follow the steps below to set up recurring payments. Recurring payments help you avoid the hassle of making payments each month. If you have set up your recurring payment method the changes will be effective in 1-2 business days.

Step 1: Click to Enter Payment Method

1	2	3	4	5	6
7	8	9	10	11	12
13	14	15	16	17	18
19	20	21	22	23	24
25	26	27	28	29	30
31					

Step 2: Click to Change Recurring Payment Date

- The Virtual Wallet will appear to add the payment method. You can assist them with entering a card or bank information in the screens pictured to the right.

Payment Information

CREDIT/DEBIT CARD **BANK ACCOUNT**

Name on Card: Name and fake card information below

Card Number: 4113 6019 7480 4222

Exp Date: 02 / 2023 CVN: 158

Zip: 53214

Save Payment Method to My Wallet VISA ****4222

BACK **NEXT**

Review & Confirm

Please confirm payment to Common Ground Healthcare Cooperative - One Time Payment of \$137.00

Member Information: Name (MemberID) \$137.00

Payment Method: VISA Name and card information

I agree to pay the above amount according to my card holder agreement.

BACK **CONFIRM**

- Members can choose the date for the recurring payment to occur each month – any day between the 15th and the 25th. Select it here, on the calendar shown.

Automatic Scheduled Payment:

Name: Name and payment info

Reference Number: Payment Mode: Credit Card

Premium payments are due on the 25th of each month for the upcoming due by May 25th.

Step 1: Click to Change or Cancel Payment Method

1	2	3	4	5	6
7	8	9	10	11	12
13	14	15	16	17	18
19	20	21	22	23	24
25	26	27	28	29	30
31					

Step 2: Click to Change Recurring Payment Date