

# JET Insure Broker Portal Training Guide 17: Making a Recurring Payment Small Group

1. To find a policy for 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	
<div style="display: flex; justify-content: space-between; align-items: center;"> <span>◀</span> <span>▶</span> </div>									

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

<a href="#">View/Edit</a>	Group Name	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. The group portal will appear on the screen as shown below.

Notifications(0) Pending Submission(1)
Welcome
Broker Name

Group Name  
Group Admin Info
Dashboard
Back to Policy Search

**Participation**

Total Employees	Eligible	Covered	Waived	Participation 100%
15	14	14	0	

PTD: N/A

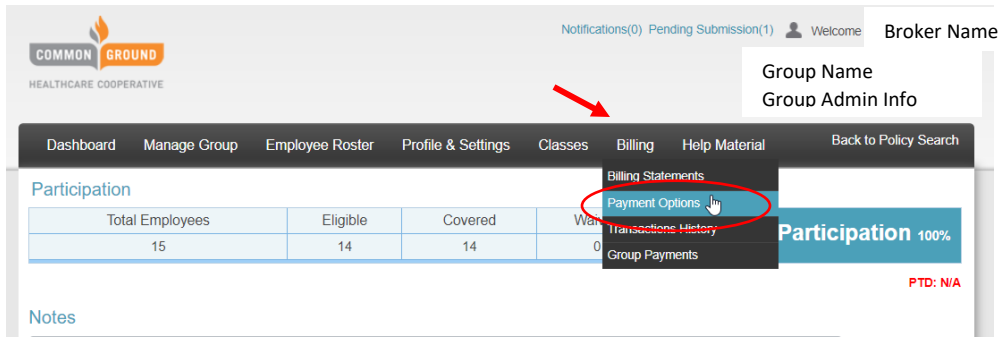
**Notes**

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

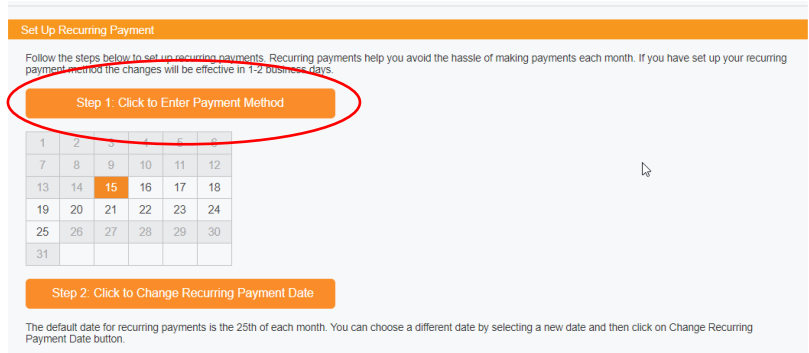
**Enrollment Summary**

Plan	Employee	Employee & Spouse	Employee & Children	Employee & Domestic Partner	Family
Envision Aurora Bellin ThedaCare CHHS PPO - Silver 3300/80/Copay40	12	1	1	0	0

5. To access payment options, however over Billing and click "Payment Options"



6. To make a recurring payment, select the day of the month you wish to establish payment and click on "Click to add a recurring Payment"



7. The virtual wallet will appear to approve/add the payment method.

If the group does not yet have a payment method saved, you can assist them with entering a card or bank information in the screens pictured below.

Confirm Payment Method

OR

Set up payment method