

# JET Insure Broker Portal Training Guide 18: Viewing Enrollment, Payment, and Plan Info 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       |              |
| <div style="display: flex; justify-content: space-between; align-items: center;"> <span>View/Edit</span> <span>Member ID</span> <span>Exchange Sub ID</span> <span>Member Name</span> <span>Individual Health Policies</span> <span>Agent/ Agency</span> <span>1/1/2020 12:00:00 AM</span> <span>12/31/2020 12:00:00 AM</span> <span>Active</span> </div> |                        |             |         |       |                |                 |        |             |              |

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

|                           |           |                 |             |                            |               |                      |                        |        |
|---------------------------|-----------|-----------------|-------------|----------------------------|---------------|----------------------|------------------------|--------|
| <a href="#">View/Edit</a> | 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 |
|---------------------------|-----------|-----------------|-------------|----------------------------|---------------|----------------------|------------------------|--------|

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: \_\_\_\_\_  
 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.

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

5. View policy summary, plan details, enrollment history, and payment history information in the screen pictured to the right.

### 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

6. Policy details and ID card download

Member Portal

**Enrollment Summary - Subscriber Name**

| Member ID   | Effective Date | Monthly Plan Cost | APTC     | Member Responsibility | Paid Through Date |
|-------------|----------------|-------------------|----------|-----------------------|-------------------|
| <b>ID #</b> | 01/2020        | \$442.63          | \$389.00 | \$53.63               | 3/31/2020         |

Agent: \_\_\_\_\_ Plan: \_\_\_\_\_  
House Account - House Account      Envision - Silver 500 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 06/30/2020, your policy will be terminated as of 04/30/2020.

Outstanding Balance: \$160.89

Download Temporary ID Card

| Member Name                  | Type      | Member ID      | Gender          | Date of Birth    | Age               | SSN      | Effective Date        | Termination Date | Monthly Plan Cost | Status |  |
|------------------------------|-----------|----------------|-----------------|------------------|-------------------|----------|-----------------------|------------------|-------------------|--------|--|
| <b>Member Policy Details</b> |           |                |                 |                  |                   |          |                       |                  |                   |        |  |
| <b>Coverage Information</b>  |           |                |                 |                  |                   |          |                       |                  |                   |        |  |
| Plan Name                    | Plan Type | Effective Date | Expiration Date | Line of Business | Monthly Plan Cost | APTC     | Member Responsibility |                  |                   |        |  |
| Envision - Silver 500 CSR    | EPO       | 01/01/2020     | 12/31/2020      | Exchange         | \$442.63          | \$389.00 | \$53.63               |                  |                   |        |  |

[Back](#)

[Download Temporary ID Card](#)

|        |      |      |    |        |     |     |     |                |                  |                   |        |
|--------|------|------|----|--------|-----|-----|-----|----------------|------------------|-------------------|--------|
| Member | Name | Type | ID | Gender | DOB | Age | SSN | Effective Date | Termination Date | Monthly Plan Cost | Status |
|--------|------|------|----|--------|-----|-----|-----|----------------|------------------|-------------------|--------|

7. Enrollment history

Member Portal


**Subscriber Name**

| Member ID   | Effective Date | Monthly Plan Cost | APTC     | Member Responsibility | Paid Through Date |
|-------------|----------------|-------------------|----------|-----------------------|-------------------|
| <b>ID #</b> | 01/01/2020     | \$442.63          | \$389.00 | \$53.63               | 3/31/2020         |

Agent: \_\_\_\_\_ Plan: \_\_\_\_\_  
House Account - House Account      Envision - Silver 500 CSR

**Enrollment History**

Applicant Name: \_\_\_\_\_ Modified Date From: \_\_\_\_\_ Modified Date To: \_\_\_\_\_

| Modified On | Activity                         | Effective Date | Modified By          | Details   |
|-------------|----------------------------------|----------------|----------------------|---|
| 04/08/2020  | Member Name – initial enrollment | 01/01/2020     | System Administrator |  |

[Back](#)

8. Transaction history

Member Portal

**Subscriber Name**

| Member ID   | Effective Date | Monthly Plan Cost | APTC     | Member Responsibility | Paid Through Date |
|-------------|----------------|-------------------|----------|-----------------------|-------------------|
| <b>ID #</b> | 01/01/2020     | \$442.63          | \$389.00 | \$53.63               | 3/31/2020         |

Agent: \_\_\_\_\_ Plan: \_\_\_\_\_  
House Account - House Account      Envision - Silver 500 CSR

**Transaction History**

| INV/PAY ID      | Date      | Type    | Description              | Amount         | Balance         |
|-----------------|-----------|---------|--------------------------|----------------|-----------------|
|                 | 12/6/2019 | Invoice |                          | \$53.63        | \$53.63         |
| <b>Invoice#</b> | 1/6/2020  | Invoice | Member Name Paid         | \$53.63        | \$107.26        |
| <b>Invoice#</b> | 1/8/2020  | Payment | Member Name Paid         | (\$53.63)      | \$53.63         |
| <b>Invoice#</b> | 2/6/2020  | Invoice | Member Name Paid         | \$53.63        | \$107.26        |
| <b>Invoice#</b> | 3/6/2020  | Invoice | Member Name Paid         | \$53.63        | \$160.89        |
| <b>Invoice#</b> | 3/9/2020  | Payment | Member Name Grace Period | (\$107.26)     | \$53.63         |
| <b>Invoice#</b> | 4/6/2020  | Invoice | Member Name Paid         | \$53.63        | \$107.26        |
| <b>Invoice#</b> | 4/22/2020 | Invoice | Member Name Paid         | \$53.63        | \$160.89        |
|                 |           |         |                          | <b>Balance</b> | <b>\$160.89</b> |

[Back](#)    [Export CSV](#)