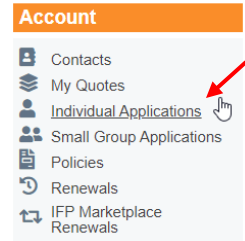


JET Insure Broker Portal Training Guide 7: Uploading Documents for Application

1. After submitting an Application for an IFP or Small Group, you are able to access the application later to add the necessary documentation for a Special Enrollment Period (SEP).
2. Find the application by clicking "Individual Applications" in the Account area of the dashboard.
3. If you're looking for a specific subscriber, fill out their identifying information. Otherwise, simply press "Search" to populate all recent/open applications.



Home > Search

Individual Applications

Contact:

Subscriber:

Issuer Subscriber ID:

Exchange Subscriber ID:

Workflow State: All

Created Date From: MM/DD/YYYY

Created Date To: MM/DD/YYYY

Agent:

Status: Active

Platform: All

Search Reset Export To Excel

Search Results Rows / Page 10 Maximum Rows 100

Contact	Subscriber	Agent	Issuer Subscriber ID	Exchange Subscriber ID	Product	Workflow State	Effective Date	Create
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4. Select the application you wish to modify.

Search Results Rows / Page 10 Maximum Rows 100

	Contact	Subscriber	Agent	Issuer Subscriber ID	Exchange Subscriber ID	Product	Workflow State	Effective
View/Edit	Carrie Underwood	Carrie Underwood				Individual Health Applications	Pending Payment	05/01,
View/Edit	Bob Smith	Bob Smith				Individual Health Applications	Application initiated, please complete and submit the application.	05/01,

5. The application will appear - scroll down to the bottom to add a document. Click "add document"

Home > Search > Application

Applications

Bob Smith

Email: 1234bobsmith@test.com State: WI Zip Code: 53005

Application Summary

Account No. Subscriber Agent Application State Effective Date

Application initiated, please complete and submit the application. 05/01/2020

Plans: Individual Health Applications - Envision - Bronze 8150/100

Coverage Information

Plan Name: Envision - Bronze 8150/100 Effective Date: 5/1/2020

Applicants

Applicant Name	Applicant Type	Gender	Date of Birth	Status
Bob Smith	Primary	Male	10/10/1980	Completed

Documents

Document Name	Created Date	Action
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Add Document

6. The add document screen is pictured below. Enter a description of the document to be added first. Then, enter the document category. You can add a comment to clicking Select and browsing your files. Click “Save.”

Home ▶ Search ▶ Application ▶ Documents

▶ Documents

Description *
Bob Loss of BadgerCare Plus Proof

Document Category *
General

Comments
Bob Smith lost BadgerCare Plus coverage due to an increase in his pay at work 14 days ago. Please see attached proof for special enrollment period.

Select

Reset Back Save

Note: Please use the SEP Documentation Guidelines Flyer if you have questions on the documentation necessary for an SEP.

SEP Documentation must include:

- Proof of previous health insurance coverage
- Proof that health insurance coverage was lost within the last 60 days