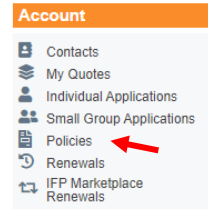


JET Insure Broker Portal Training Guide 8: Communication Preferences

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, 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

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. The member’s enrollment summary will appear. Click on “Communication Preferences”

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.

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

5. You can use this screen to change the member's communication preferences. Note how communication preferences can differ for invoices and for letters and plan 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

Communication Preferences

Invoices

Email Paper

Member address _____

Letters and Plan Documents

Email Paper

Member address _____

This option excludes ID cards, Explanation of Benefits (EOBs) and any documents we are legally required to send to you in the mail.

[Back](#) [Save](#)

For example, members can get invoices through email but can decide that they still want grace letters, plan change letters, or renewal information in through the mail.

If they wish to change their communication preference to email, it can be the same email used for their JET account, or a different email they choose.

Click "Save."