

AmeriHealth New Jersey
Individual Products

Retail Platform User Guide



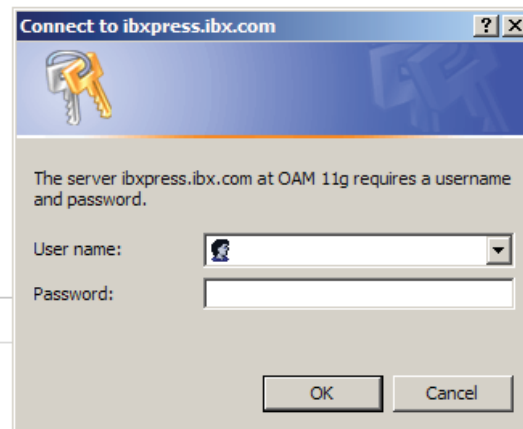
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1: Logging on to the Retail Platform

To access the platform, login to ROAM by visiting:

<https://ecom.ibx.com/Login>



IMPORTANT NOTE:
For the most efficient use of the AmeriHealth Retail Platform, we suggest you use Google Chrome as your Internet browser. Please install the proper browser, if needed.

Accessing ROAM: User ID and Password

For Primary and Producing Agents: Enter your existing ROAM Login ID and password.

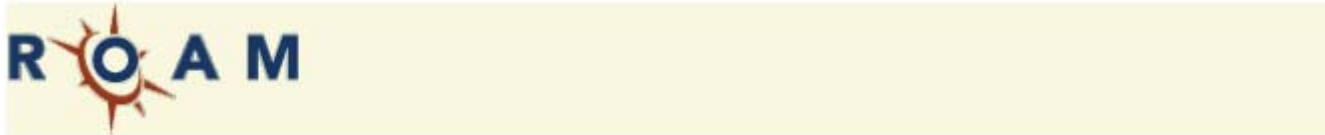
For Producing Agents: If you do not have a ROAM Login ID, or do not remember your ROAM Login ID, please contact your Primary Agency.

For Primary Agents: If you or your agent do not have a ROAM Login ID, or don't remember your ROAM Login ID, please contact the ROAM Administrator for your agency.

NOTE: The system times out after 30 minutes of inactivity.

1

From your ROAM access screen, please select **AmeriHealth New Jersey** and click **Continue**.



Broker Id Selection

Please select the broker id with which you wish to work:

Broker Id	Broker Name	Company Name
<input type="radio"/> NJ02637A		AmeriHealth North New Jersey
<input type="radio"/> SJ02637A		AmeriHealth South New Jersey
<input checked="" type="radio"/> NJ02637G		AmeriHealth New Jersey



2

Click on the **Tools** tab:

The screenshot shows the ROAM application interface. At the top left is the ROAM logo. At the top right is the AmeriHealth logo. Below these is a dark blue navigation bar with the following tabs: Home, Administration, Customers, Benefits, Commissions, Tools, Help, and Log Off. The 'Tools' tab is selected. On the left side, there is a sidebar menu with the following items: Messages (expanded), Business Selection, Links, Bulletins, and Change Your Password. The main content area displays a message titled 'ROAM Administrator Emails'. A red 3D-style arrow points to the 'Messages' section in the sidebar.

Messages

ROAM Administrator Emails

We recently identified an issue where the ROAM administrator within your agency received multiple emails which stated the following:

"Your account with InsureConnect EZ has been enabled, your password is xxxxxxxx. Your login name is not included with this email for security reasons."

3

Click on the **ahnj4U button**, which can be found on either the left hand toolbar or the main screen



[BAGS](#)
[ahnj4U](#)
[HSA Savings Calculator](#)



Tools for External Users

- SBC
- Brochures and Giveaways System (BAGS)
- ahnj4U Individual Portal
- HSA Savings Calculator



You can click either a button or a left menu item.

For Primary Agents: A new window will launch, asking you to select a Producing Agency from the dropdown list. Only agencies that are tied to you (as a Primary Agency) will show up in this listing, which is sorted alphabetically.

Producing Agents: Skip to Step 5.

- 4 Select the **Producing Agency** from the list for whom you are completing a transaction.

Please select a Producing Agency from the list.

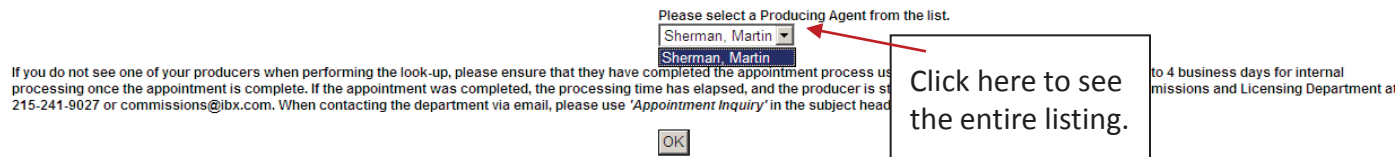
NJ07189 - NORMAN K. MUI

OK

Click here to see the entire listing.

For Primary and Producing Agents: The next screen will ask you to select a Producing Agent from the dropdown list. Only agents that are tied to the selected agency will show up in this listing, which is sorted alphabetically.

- 5 Select the **Producing Agent** from the list for whom you are completing a transaction.



If a producers name does not display here: please ensure that they have completed the appointment processing using the Sales Sentinel link. It will take up to 4 business days to process once the Sentinel system shows the process is complete.

For Primary Agents: If the appointment has been completed, you have waiting the appropriate amount of time, and the agent name is still not displayed; please contact the Commissions and Licensing Department at 21-241-9027 or commissions@ibx.com. If using email, please title the subject of the message “Appointment Inquiry” for better tracking and expedited assistance.

[NOTE: Only Primary Agents may contact the Commissions Department with questions.]






2: Welcome to the Retail Platform Dashboard


After you log in, the welcome page displays a Dashboard, which gives you access to information to assist you in managing your individual accounts. The home screen displays four main functions: Dashboard, Activities, Work Queue, and Tools. These four headers will assist you with a variety of functions from quoting, applying, and even gaining access to prospect information.

Welcome, BROKER NAME! 1-888-879-5331  



[Advanced Search](#)

 Dashboard  Activities  Work Queue  Tools 

Expand All Collapse All  Dashboard Settings

New Business Scorecard

Individual - Last 14 Days

No data was found. Please check again later.

Message Center

Search:

Case Type	Received	Case Name	ID	Subject
No data was found. Please check again later.				

Note: At this time, the dashboard will only display activity for the selected Producing Agent only. Additional dashboard functionality coming soon!

3: The Dashboard Tab

AmeriHealth
NEW JERSEY | ahnj[®]4U

[Advanced Search](#)

Dashboard Activities Work Queue Tools

Case Name

Expand All Collapse All

New Business Scorecard

Individual - Last 14 Days

No data was found. Please check again later.

Message Center

Search:

Case Type	Received	Case Name	ID	Subject
No data was found. Please check again later.				

The Dashboard Tab

This is your home screen key. At any time, clicking this button will take you back to the Dashboard home screen.

3a: Message Center - Viewing and Deleting Your Messages



[Advanced Search](#)

Dashboard | Activities | Work Queue | Tools | Case Name

Expand All Collapse All

New Business Scorecard

Individual - Last 14 Days

No data was found. Please check again later.

Message Center

Search:

Received	Case Name	ID	Subject
No data was found. Please check again later.			



Message Center

In this section, you will be able to see any emails that were sent to you in regard to your current cases.

4: The Activities Tab



[Advanced Search](#)

Dashboard | **Activities** | Work Queue | Tools

Case Name

Recent | New Quote

New Business Search

Individual - Last 14 Days

No data was found. Please check again later.

Search:

Case Type	Received	Case Name	ID	Subject
No data was found. Please check again later.				

The Activities Tab

Use this tab to quickly access your 10 most **Recent** cases or start a **New Quote**.

4a: Recent Activities

By hovering your mouse over the word Recent, a list of cases will display to the right hand side. The cases shown are the last ten cases that you have worked on, in any capacity.

The screenshot shows the AmeriHealth ahnj4U dashboard. The top navigation bar includes 'Dashboard', 'Activities', 'Work Queue', and 'Tools'. A search bar for 'Case Name' is on the right. The 'Activities' menu is open, with 'Recent' highlighted in a red box. Below the navigation bar, there are several panels: 'New Business S' with a 'New Quote' dropdown, 'Individual - Last 14 Days' (no data found), 'Message Center' (table with columns: Case Type, Received, Case Name, ID, Subject, Sender; no data found), 'Quote Activity' (search bar), and 'Application Activity' (search bar). The 'Message Center' table has a status bar at the bottom showing 'Showing 0 to 0 of 0 entries' and navigation buttons: First, Previous, Next, Last.

AmeriHealth NEW JERSEY ahnj4U

Advanced Search

Dashboard Activities Work Queue Tools Case Name

Recent

Expand All Collapse All Dashboard Settings

New Business S New Quote

Individual - Last 14 Days

No data was found. Please check again later.

Message Center

Search:

Case Type	Received	Case Name	ID	Subject	Sender
No data was found. Please check again later.					

Showing 0 to 0 of 0 entries

First Previous Next Last

Quote Activity Search:

Application Activity Search:

4b: New Quote



Start Here (can be completed by a member or broker)

- (1) Enter the applicant's zip code
- (2) Respond Yes or No if you are shopping for a child only plan
- (3) Respond accordingly if the applicant is Native American or Alaskan Native
- (4) Enter the applicant's first name
- (5) Enter the applicant's date of birth
- (6) Enter the relationship to the applicant (i.e., self, spouse, etc)
- (7) Select the applicant's Gender
- (8) Indicate if the applicant is a smoker.



STEP 1: Build Your Profile

STEP 2: See & Compare Plans

STEP 3: Decide &

148 Days Left for Open Enrollment

You have until 03/31/2014 to apply for coverage

Looking for coverage sooner?

You will need a valid reason if you want to enroll in a plan outside the open enrollment period. Contact an AmeriHealth representative today to help you with your enrollment questions.

1-888-879-5331

ZIP Code:

My household:

Are you shopping for a Child only plan? 

No

Are you or any of your dependents Native American or Native Alaskan?

No

First Name	Date of Birth	Relationship	Gender	Tobacco? 
<input type="text"/>	<input type="text"/>	Self	Choose	Choose

Add Dependent

When you have entered this requested information, you simply click [Save & Continue](#) to move on to the shopping experience


[Save & Continue](#)

2

Choose How to Shop

After the applicant or submitter moves on to the shopping experience, they will have the option to be guided through the plan options or browse on their own.



STEP 1: Build Your Profile  STEP 2: See & Compare Plans

STEP 3: Decide & Enroll

How do you want to shop for plans?



Guide Me

I'd like to answer a few lifestyle and budget questions so that you can help guide me to the right plan.

Guide Me



Browse

I'd just like to view all your available plans and determine the right plan myself.

Browse

In the Guide Me experience, members will answer simple questions about Their health and care preferences to help the system determine a “best match”.

Once you enter the shopping screen, you can view detailed plan information by clicking on each plan. You will have the option to either add to quote or add to cart. For instructions on Adding to the Cart, see Step 9.

As a broker, you can email a selection of plans to the applicant to review and complete enrollment.

3

Add to Quote: You can select and compare plans in order to send in an email to the applicant.

- (1) Click on the **Add to Quote** box for the plans you wish to compare and send.
- (2) Click the **Quotation** button, a Quote Summary will appear

The screenshot shows the AmeriHealth website interface. At the top, a dark blue navigation bar contains the text "Welcome, BROKER!" on the left, the phone number "1-888-879-5331" in the center, and icons for help, a red "Quotation" button (highlighted with a red box), and a shopping cart labeled "Cart (0)". Below the navigation bar, the AmeriHealth logo and "ahnj 4U" are displayed on the left, and a progress bar shows "STEP 1: Build Your Profile", "STEP 2: See & Compare Plans", and "STEP 3: Decide & Enroll". A dark blue banner below the progress bar reads "Your recommendations" and "Based on your answers, we've ranked and sorted the plans that best match your needs." with a "Start Now" link. The main content area is titled "See & Compare Plans" and includes a "Medical" dropdown menu, a "View:" selector set to "888", and "Compare" and "Print" icons. The "Compare Plans" section displays three plan cards. The first card is "AmeriHealth NJ Select Local Value Silver HMO" with a price of "\$378.05/ mo" and a red "Add to Cart" button and a grey "Add to Quote" button. The second card is "AmeriHealth NJ Premium Local Value Bronze EPO" with a price of "\$366.39/ mo" and a red "Add to Cart" button and a grey "Add to Quote" button. The third card is "AmeriHealth NJ Premium National Access Silver POS+" with a price of "\$515.42/ mo" and a red "Add to Cart" button and a grey "Add to Quote" button (highlighted with a red box). A "Back to Plan List" link is located above the plan cards.

4

Click Save and Create Case.

The screenshot displays the AmeriHealth NJ website interface. At the top left is the AmeriHealth New Jersey logo and the text 'ahnj 4U'. The page is in 'STEP 1: Build Your Plan' and '3: Decide & Enroll'. A 'Quote Summary' pop-up window is open, showing '1 plan added to quote' and a table with the following data:

Plan	Monthly Rate
AmeriHealth NJ Premium National Access Silver POS+	\$515.42

Below the table is a red 'Save & Create Case' button. To the right of the pop-up are 'Compare' and 'Print' icons. The main content area features a 'Your recommendations' banner, a 'See & Compare Plans' section, and a 'Compare Plans' card. The 'Compare Plans' card shows three plan options:

- AmeriHealth NJ Select Local Value Silver HMO: \$378.05 / mo
- AmeriHealth NJ Premium Local Value Bronze EPO: \$366.39 / mo
- AmeriHealth NJ Premium National Access Silver POS+: \$515.42 / mo

Each plan card includes a 'View Cost Breakdown' link. The interface also includes a 'Medical' dropdown menu, a 'View:' selector, and a 'Back to Plan List' link.



Set up your case by entering the required information, then clicking **Continue**



[Advanced Search](#)

Dashboard | Activities | Work Queue | Tools | Case Name

Save Quote & Create Case

The case information provides the high level information related to multiple quotes and applications.

Case Information * Required

Demographics

* Case Name:

Address Line 1:

Address Line 2:

City:

* State: * ZIP Code: -

County:

Contact Information

First Name: Last Name:

Relationship:

6

Select the plans you wish to email to the client, then click Generate Proposal.



[Advanced Search](#)

Dashboard | Activities | Work Queue | Tools | Case Name []

AHNJ4U Test Status: Prospect

Case Information | New Business | Case Notes & Messages | Case History

Quote Summary -- 1936
Copy Quote
Attachments (0)

Quote Summary

Quote Status: Quoting

The following is a summary of the quote information.

Modify Quote | **Generate Proposal** | Apply

Quote Summary -- 1936

Quote Detail

Quote Status: Quoting Created By: BRIAN CURTIS
Coverage Type: Individual and Family Plans
Requested Effective Date: 01/01/2014 Number of Applicants: 1

Applicant(s) Information

Person(s) Covered	Date of Birth	Age	Gender
Primary Applicant	05/27/1967	46	Male
Medical			

Select Plan	Deductible	Prescription	Office Visit	Monthly Rate	
<input type="checkbox"/> AmeriHealth NJ Premium National Access Silver POS+ SILVER	\$2,500 / \$5,000	N/A	N/A	\$515.42	Delete

Proposed Insured Rate \$515.42 Spouse Rate \$0.00 Child Rate \$0.00 Total Rate \$515.42

Vision

7

Select the type of Proposal from the Template, add the recipients, enter a message to the client, then click Send Proposal.



Dashboard | Activities | Work Queue | Tools | Case Name

AHNJ4U Test Status: Prospect

Case Information | New Business | Case Notes & Messages | Case History

Quote Summary -- 1936
Copy Quote
Attachments (0)

Quote Summary -- Generate Proposal

Case Name: AHNJ4U Test
Quote Status: Quoting

To send the proposal, select the appropriate person below. To view the proposal before sending, click the 'Preview' button.

Cancel Preview **Send Proposal**

Proposal Generation

Proposal Template Options

HTML Plan Comparison

The system will provide the selected plans and a link for the user to register and apply online. If you have selected more than three (3) plans on this quote, you must indicate which plans you wish to be included on the email. Indicate the plans you wish to include in the HTML Plan Comparison

Plan Selection

Select	Plan Name	Description	Monthly Rate
<input checked="" type="checkbox"/>	AmeriHealth NJ Premium National Access Silver POS+ SILVER	AmeriHealth NJ Premium National Access Silver POS+	\$515.42

Recipients

Check the recipients you wish to receive the proposal. You may include multiple emails within the Email Other entry box. A semi colon must be entered to separate email addresses.

Email Email Case's Primary Contact (michael.murphy@amerihealth.com)

Enter an additional message (optional)

Cancel Preview **Send Proposal**

Be sure to enter a message. Although it is listed as optional, this will ensure that your information is listed in the header of the email to the client.



Add to Cart

Adding a plan to your cart means you are ready to enroll. If you click Add to Cart, you will see a quick summary where you are given the opportunity to view cart or enroll or to continue shopping.

IMPORTANT: The Patient Protection and Affordable Care Act (PPACA) requires that you have pediatric dental coverage. Please select the Smile for Health Family C40A50 dental plan which provides coverage for you and any eligible family members including pediatric dental coverage as required by PPACA. If you do not select the Smile for Health Family C40A50 dental plan or purchase pediatric dental coverage elsewhere, you will be out of compliance with PPACA.

1 Plan Added to Cart
AmeriHealth NJ Premium National
Access Silver POS+
\$515.42/ mo

Cart Summary (1 Item)
Subtotal **\$515.42/ mo**

[View Cart & Enroll](#)
[Continue Shopping](#)

Complete Your Coverage

Dental
Smile for Health Family C40A50
\$14.02/ mo

[View All](#) [Add](#)

Please Note: If you continue shopping, the options will now read “Replace Plan in Cart” Only one plan can be added to your cart at any time. Selecting a new plan will replace the plan that is currently in your cart.

5: The Work Queue Tab



Dashboard | Activities | **Work Queue** | Tools | Case Name

[Advanced Search](#)

Work Queue

The following list contains a work queue for all cases. To sort the data, To view additional case information, click the 'Case Name' hyperlink.
Note: Cases can contain one or more quotes or applications but will be

The Work Queue Tab
Use the Work Queue to find and sort existing cases, both applicants and prospects.

View: No filter applied

Work queue results and filter criteria

1 to 1 of 1

<u>Case Type</u>	<u>Case Name</u>	<u>Contact Name</u>	<u>Contact Phone</u>	<u>Case Status</u>	<u>Created Date</u>
	AHNJ4U Test	--	--	Prospect	11/03/2013

5a: Filter and Sort your Work Queue

The screenshot shows the AmeriHea New Jersey Work Queue interface. On the left, there is a navigation menu with the AmeriHea logo and a list of status options: Submitted, Reviewing, Approved, Declined, Requested Coverage Declined, Canceled, Accepted, and Inactive. Below these are filters for 'Leads' (All, My Open, All Assigned, Unassigned) and 'View' (Quoting). A 'Filter' button shows 'No filter applied'. A large red arrow points to a 'Tools' dropdown menu. A callout box titled 'Sort Your Work Queue' contains the text: 'You can run a specific search or "filter" using the drop down arrow.' Below the callout, there is an 'Export' button and a caption: 'Work queue results and filter criteria'.

Sort Your Work Queue

You can run a specific search or "filter" using the drop down arrow.

Filter *No filter applied*

Export

Work queue results and filter criteria

5b: Case Summary



Dashboard | Activities | Work Queue | Tools | Case Name

AHNJ4U Test Status: Prospect

Case Information | New Business | Case Notes & Messages | **Case Summary**

Case Summary - Individual

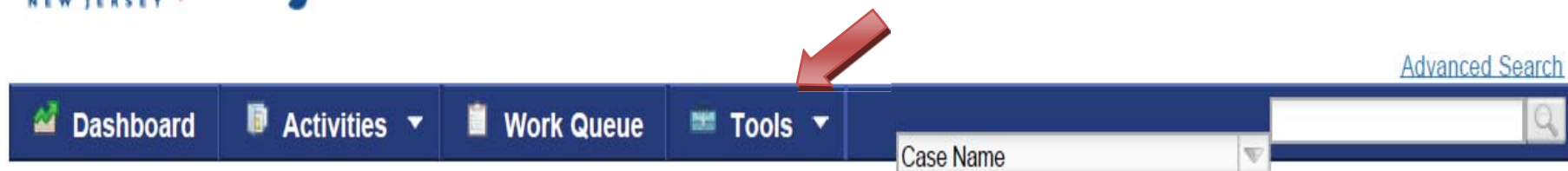


Case ID: 1863
Case Contact: NJ 08106
michael.murphy@amerihealth.com

Case Summary
When you click to open a case, additional information is available by clicking the tabs. You have new functions for things like viewing the case history or making notes.

6: Tools

Under the tools section, click “Resource Library”. In the Resource Category, there will be various categories that will assist you in finding information or managing your benefits. To view a category’s details, click the category name.



Resource Library

The following are various categories to assist you in finding information or managing your benefits. To view a category's details, click the category name.

<u>Resource Category</u>	<u>Description</u>
--------------------------	--------------------

7. Applying and Enrolling

Once you have decided to enroll in a plan, you will have to complete a brief **Prior to Applying** section, as well as choose your method of application

7a.

Prior to Applying

Please review and update the following information.

*Required

Contact Information

Name
*First Name MI *Last Name Suffix

Address
*Address Line 1 Address Line 2 *City *State
 NJ

*ZIP Code
 08106

Phone Number(s)
Phone Type Phone Number Ext.

Phone Type Phone Number Ext.

*Email

7b.

Select Completion Method

- I will start the application for my client online
You will be able to start the application for your client. When you are ready for your client to complete the application, forward the application at any point in the process but prior to e-Signature.
- I will enter the completed application for my client
Sales agents can submit telephonic applications. Brokers can submit the application after obtaining a signed paper copy from the client.