

**friday**<sup>TM</sup>  
health plans



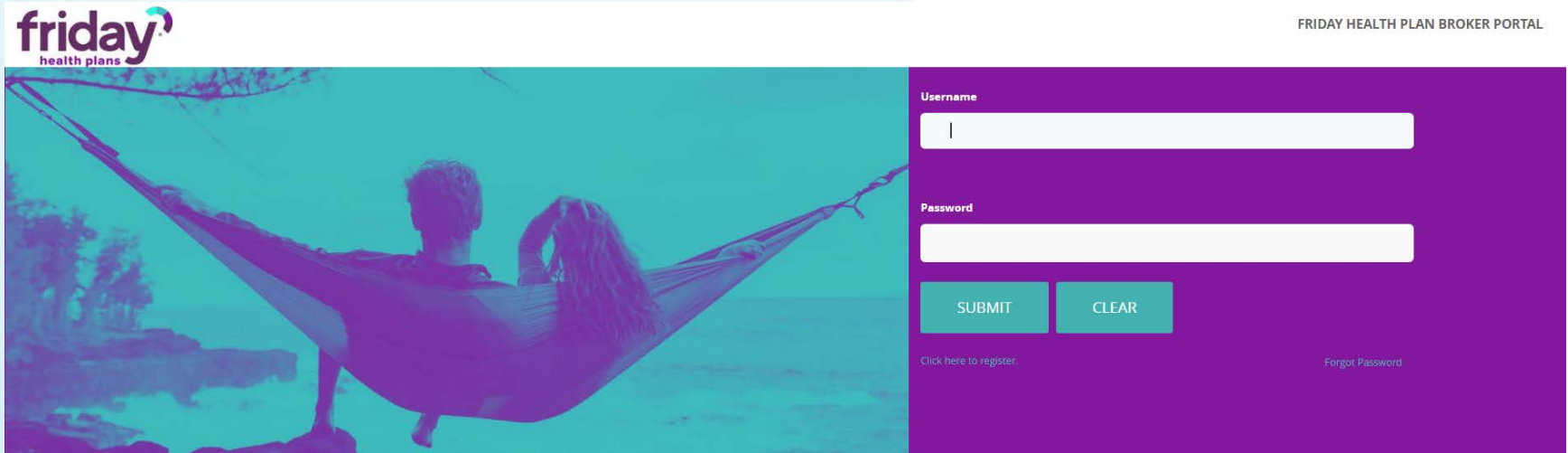
# Broker Portal

Training

# New & Revised Features

- Dashboard
- Quick Quote
- Client tracking
- Personalized Broker URL
- Policy Tracking (Coming January 1)
- Commission Reports (Coming Soon)

# Broker Login / Registration

A screenshot of the Friday Health Plan Broker Portal. The page has a dark blue header with the Friday Health Plans logo on the left and the text "FRIDAY HEALTH PLAN BROKER PORTAL" on the right. Below the header is a large image of a couple in a hammock. To the right of the image is a white login and registration form. The form has two input fields: "Username" and "Password". Below the "Password" field are two buttons: "SUBMIT" and "CLEAR". At the bottom of the form, there are two links: "Click here to register." and "Forgot Password".

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FRIDAY HEALTH PLAN BROKER PORTAL

Username

Password

SUBMIT CLEAR

[Click here to register.](#) [Forgot Password](#)

- Ability to use existing login credentials
- New brokers can register by clicking the register button. The broker will provide a username, email address, license # and NPN

# Broker Portal Dashboard



Home Clients Applications Quotes Profile News & Resources Search Provider Search RX

James  [View Profile](#)

### Clients

First Name	Last Name	Phone	Email
Billy	Jones	(720) 486-7852	simucu@sandca
Donna	Jones	(719) 852-1478	nezemifef@nyrm
Sara	Smith	(720) 852-7416	boxoxa@orank
NEWE	CLIENT	(394) 875-6834	neww@client.co

[Create Client](#) [Show All](#)

### Applications

App. ID #	Subscriber Name	Req. Eff. Date	Status
2258		1-1-2019	Not Yet Submitte
2256			Not Yet Submitte
2253	Sara Smith	1-1-2019	Submitted
2245	Jer Medina	1-1-2019	Submitted

[Show All](#)

### Policies

Coming Soon

### Quotes

Quote #	Client Name	Created	Plans
179	Donna Jones	10-15-2018	Friday Silver Plu
177	NEWE CLIENT	10-15-2018	Friday Bronze H!
176	NEWE CLIENT	10-15-2018	Friday Bronze
175	NEWE CLIENT	10-15-2018	Friday Bronze

[Create Quote](#) [Show All](#)

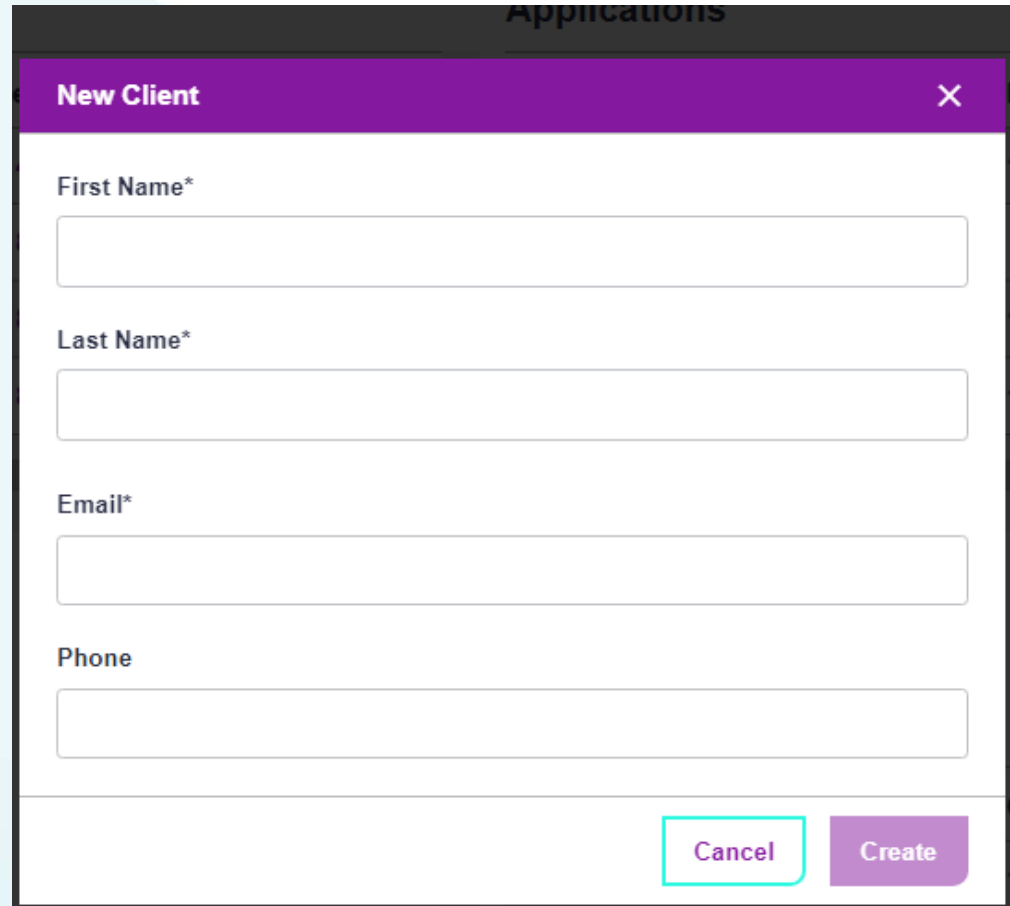
/prospects/175

- Client Quadrant: displays all clients created by broker [select “create client”]
- Application Quadrant: displays all applications in progress, with a status of Submitted or Not Submitted .
- Policies Quadrant: displays all policies associated with a broker. An application results in a Policy once initial payment has been processed. Policies will not appear until 1/1/2019.
- Quote Quadrant: displays all quotes that were saved/attached to a client

# Create New Client

A Client record is required to initiate an application. The Client is typically the subscriber for an application. However, a Client may not be the applicant, but a Responsible Party for the applicant.

- Enter in Clients first and last name
- Enter in Client email – which must be unique for each Client
- Phone number (Optional)

A screenshot of a web application interface. At the top, the word "Applications" is partially visible. Below it is a modal window titled "New Client" with a close button (X) in the top right corner. The form contains four input fields: "First Name\*" (required), "Last Name\*" (required), "Email\*" (required), and "Phone" (optional). At the bottom right of the form are two buttons: "Cancel" (outlined in red) and "Create" (solid blue).

# Client Details

## Client Details

**Test Tester**

**Email Address**  
kixoxejov@orane.com

**Phone Number**  
7208520148

**Created**  
10-15-2018

[Edit](#)

**Notes**

Type your notes here

[Save](#)

## Applications

Application ID	Subscriber Name	Subscriber ID	Effective Date	Product Type	Status
No data to display					

[Create Application](#)



## Quotes

Quote #	Client Name	Created	Plans
No data to display			

[Create Quote](#)

- Ability to generate a quick quote by just clicking create quote
  - Stores the clients quote in dashboard
- Ability to create the client application by just clicking create application
  - Stores and saves applications created

# Initiate Quote or Application



## INDIVIDUAL QUOTE

### Eligibility Information

To see what policies your subscriber will be eligible for, we need to know when they need their coverage to start, and where they live.

Date your client's health coverage will start?\*

1/1/2019

### Where is your primary residence?\*

Zip Code\*

80204

County\*

Denver

### Child Only

Is this a child(ren) only policy?\*

YES

NO

### Subscriber

Date of Birth\*

mm/dd/yyyy

Tobacco User?\*

YES

NO

### Spouse / Partner

Does the subscriber want to add a spouse / partner?\*

YES

NO

### Dependents

Does the subscriber want to cover any dependents?\*

YES

NO

- Enter required Member information for Subscriber and Dependents, as needed
- Complete the quote and download “quick quote” or save the quote and start an application once your Client has made a decision to enroll



# Select Plans



## INDIVIDUAL QUOTE

### Select Plans

Check out the simple Friday plans to find one that covers you best. Having trouble choosing? We've got you covered! Call us and our Colorado-based sales folks who can help you select a great fit.

^ Plan Members

0

Subscriber  
Born 1988-09-08

#### Plan Level

Please choose a plan

#### Deductible

\$500 \$8,000

#### Monthly Premium

\$100 \$2,500

#### Max Out of Pocket

\$2,500 \$8,000

#### SELECTED PLAN

**Friday Silver \$370.21**  
**Friday Silver Plus \$403.23**

Clear

X

X

Showing 1 - 7 of 7 plans >

View as:

Sort By: Monthly Premium ▾

Compare	Plan Name	Premium	
<input type="checkbox"/>	^ Friday Catastrophic	\$209.86	Choose Plan
<input type="checkbox"/>	^ Friday Bronze	\$329.33	Choose Plan
<input type="checkbox"/>	^ Friday Bronze HSA	\$354.01	Choose Plan
<input checked="" type="checkbox"/>	Friday Silver	\$370.21	Selected
<input checked="" type="checkbox"/>	^ Friday Silver Plus	\$403.23	Selected
<input type="checkbox"/>	^ Friday Gold	\$484.85	Choose Plan
<input type="checkbox"/>	^ Friday Gold Plus	\$533.89	Choose Plan

- Check compare column to view and compare plan options online
- Choose plans you want in your quote and select NEXT

# Review & Save Quote

## INDIVIDUAL QUOTE

### Review Quote

Review the quote and edit, if desired. When done, you can select “Download Quick Quote” to get document immediately, or select “Complete Quote” which will require you to assign the quote to a Client and save. All saved quotes will be available in your dashboard.

Eligibility Information



Quote



Assign Quote To Client



Back

Exit Without Saving

Download Quick Quote

Complete Quote

- 1) **Exit without Saving** – allows broker to leave page and NOT save quote
- 2) **Download Quick Quote** – allows broker to just download the result, and NOT assign to a Client or save
- 3) **Complete Quote** – requires user to assign & save the quote to a Client; UI opens the “Assign Quote to Client” window to add New or update Existing Client

# Quote Summary

You can download a quote to print.  
Or, you can copy/paste the quote into an email to send your Client.

The quote includes the Broker URL, which is your personalized URL link that allows member to link to shopping portal and pre-populate the broker data on the application.

	Broker Id: 1286	Broker Name: Wendy Scipione	Agency Id: 1286
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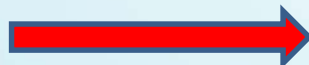
The quote below is based on the following member criteria provided:

MEMBER INFORMATION	Number Of Members: 3
Type: Subscriber	Type: Spouse
Date Of Birth: 1991-01-01	Date Of Birth: 1991-01-01
Tobacco: Yes	Tobacco: Yes
Type: Dependent	
Date Of Birth: 1991-01-01	
Tobacco: Yes	

QUOTE INFORMATION	Coverage Effective: 2019-02-01
<b>Friday Bronze</b>	<b>Friday Bronze HSA</b>
Premium	
\$946.20	\$1017.12
Individual Deductible	
Mental Health Visit	
\$0 after Deductible	\$0 after Deductible
Hospital Stay	
\$0 after Deductible	\$0 after Deductible

**BROKER URL:**

[https://dtc-friday.uat.zipari.net/broker\\_session=Wendy%20Scipione&broker\\_id=1286](https://dtc-friday.uat.zipari.net/broker_session=Wendy%20Scipione&broker_id=1286)



# Broker Profile

Log out

Home Clients Applications Quotes **Profile** News & Resources Search Provider Search RX



Veron

View Profile

## Clients

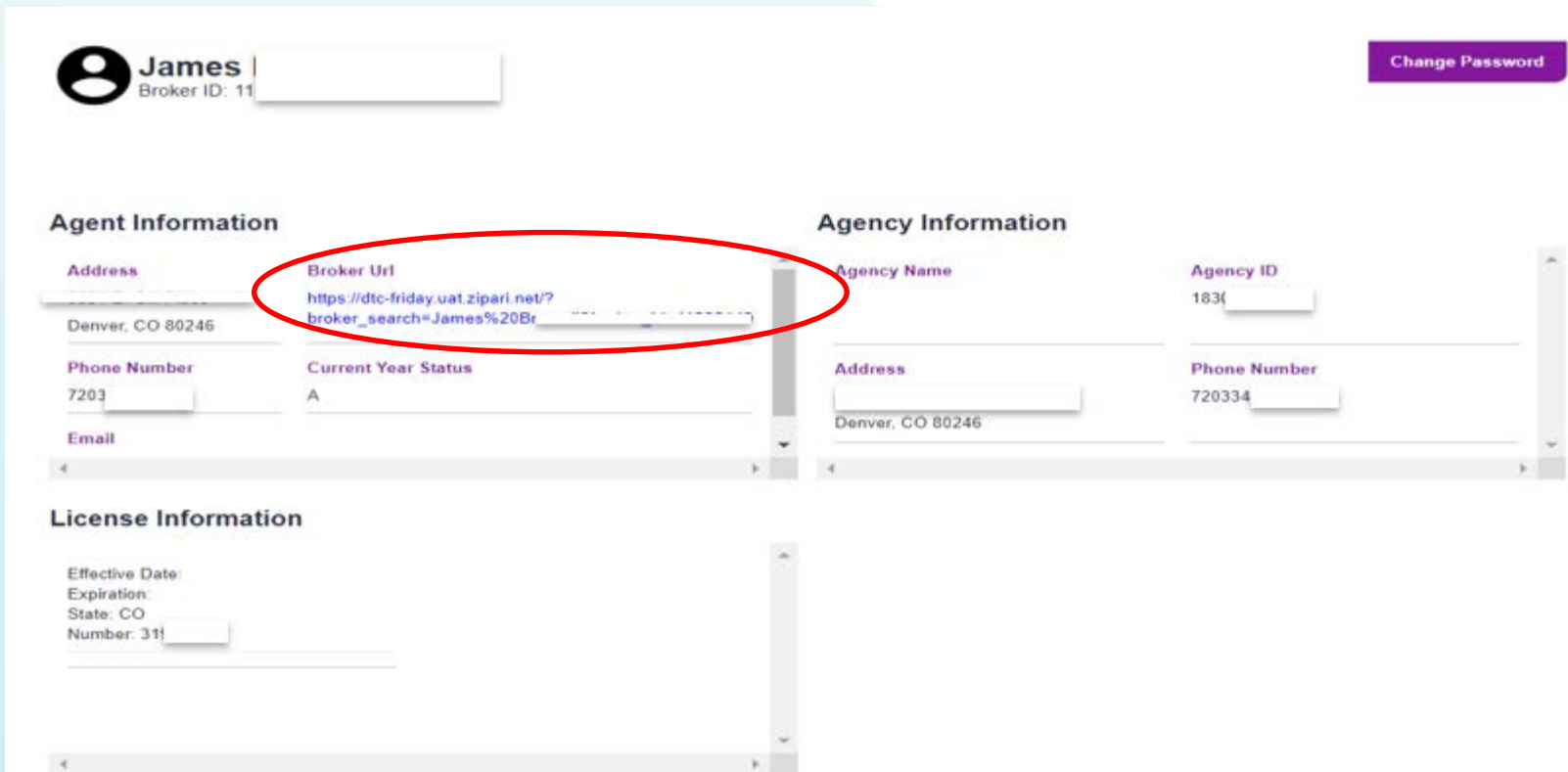
First Name	Last Name	Phone	Email
Sally	Storey		store@yahoo.com

## Applications

App. ID #	Subscriber Name	Req. Eff. Date	Status
2414	Krystle Broker	1-1-2019	Submitted

- Select **View Profile** from broker portal dashboard

# Broker Profile



The screenshot shows a user profile page for a broker named James. The page includes a header with the user's name and a 'Change Password' button. Below the header are three main sections: Agent Information, Agency Information, and License Information. The 'Agent Information' section contains fields for Address, Phone Number, Email, and Current Year Status. The 'Broker Url' field is circled in red and contains the URL: [https://dtc-friday.uat.zipari.net/broker\\_search=James%20Br](https://dtc-friday.uat.zipari.net/broker_search=James%20Br). The 'Agency Information' section contains fields for Agency Name, Agency ID, Address, and Phone Number. The 'License Information' section contains fields for Effective Date, Expiration, State, and Number.

- Ability to copy and paste broker URL to send client
- If you have any changes to your profile data, you must contact Friday Health Plans to update your record

# Search Provider & RX



Log out

Home Clients Applications Quotes Profile News & Resources Search Provider Search RX

David R Scott, MD

**JOINING OUR NETWORK ON 01/01/2019**

Practice Name: N/A

Accepting New Patients: Yes

1120 Wellington Ave

Grand Junction, CO 81501

[Click for Phone number](#)

[View profile](#)

1.0 Miles

Compare

Tyler M Lewark, MD

**LEAVING OUR NETWORK ON 12/31/2018**

Practice Name: N/A

Accepting New Patients: Yes

1400 S Potomac St, #240

Aurora, CO 80012

[Click for Phone number](#)

[View profile](#)

0.9 Miles

Compare

- Provider & RX search capability available from broker portal
- Messaging exists where provider is joining or leaving the network in the future

Questions???