Frequently Asked Questions for Brokers

Personal Health Plan Member Portal

Can I register my client on the portal on their behalf?

As individual personal information is required for registration and for privacy and security reasons, only policy holders can register for the portal. This information should not be shared with others.

Can I connect my brokerage to my client's account through the portal?

Only members are able to access their Member Portal. If you would like to change the brokerage listed on a client's account, please submit the Broker of Record Change Form.

Will I get commission for my client's renewal payment if it is made through the portal?

If your brokerage is listed as the broker office on the member's plan then you would receive your corresponding commission from the payment.

Can I still get commission for my client's payments if they set up the monthly option on the portal?

If your brokerage is listed as the broker office on the member's plan then you would receive your corresponding commission from the payments.

What payment options are available through the member's portal?

Renewal payments can only be processed through the Member Portal using a Credit Card.

Can I log into my client's account and print off premium receipts for them?

Only members are able to access their Member Portal. If you would like to request a receipt for a client you would have to speak to a Customer Service Representative.

Can members add / remove benefits to their plan through the portal?

To add or remove benefits to their plan, members would have to contact their Broker or a Customer Service Representative by phone or in person.

Can I submit documents for my client using their portal?

Only members are able to access their Member Portal. If you would like to submit documents for your client, please include the document with your regular broker submissions and indicate the client's information on it.

If I send a document by mail/fax for my client, will it show in their Document History on the portal?

Only documents that are received through the Member Portal will appear in the Document History section of the Member Portal.

Can my client have their new member cards sent to our broker office to pick up?

New member cards that are requested through the Member Portal are automatically mailed to the member.