Agent iStore Quick Reference

PacificSource HEALTH PLANS

Your Agent iStore site is customized with your contact information, and you are listed as agent of record for all plans that are purchased through your iStore. Once you've registered and are approved, you'll receive a unique URL for your Agent iStore and access to the Account Center.

If you need assistance, please contact your PacificSource Individual Service Representative.

Tip: Your username is your first initial and last name.

Account Center

Web address for your iStore.

Generate a Quote
Create a proposal for a client.

Message Center
Check your iStore-specific messages.

Client Search
Advanced Search
Find a specific client by name or find sets of clients based on criteria.

Application Count Snapshot, Reports & Analytics

Monitor the application process. View applications by status through predefined queries, or check site traffic.

Welcome, Mary

My iStore URL
https://psor.qa.inshealth.com/ehi/Alliance?allid=Pac26719&agentid=593741

GENERATE A QUOTE

Message Center » See All Messages

Agent Portal Account Status C... 07/24/2008
by System
Hello Mary Smith, This message is to inform ...

Agent Portal Registration Confi... 07/24/2008
by System
Hello Mary Smith, This message is to inform ...

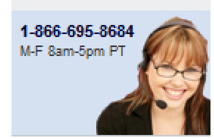
Client Search | Advanced Search

First Name: | Last Name:
Email Address:
Search

Application Count Snapshot
0 Proposals
1 Incomplete
0 Pending

Reports & Analytics
Current Approved Applications
Recently Approved Applications - Past 30 Days
My iStore Site Traffic (This Month)

Agent Assistance
1-866-695-8684
M-F 8am-5pm PT



Resources
My Profile
Create Banner Link
Create Text Link

Resources

My Profile: Change your Agent Info box and account information.

Create Banner Link: Generate HTML code for a graphic banner link to add to another Web page.

Create Text Link: Generate text link HTML.

My Profile

Agent Info Box

1. In My Profile, click Customize "Your Agent's Info" Box.
2. Click the checkboxes for the contact information that appears in the left column on your iStore site.

Change Account Details

1. In My Profile, click Change your info?
2. Change your contact information, password, and whether or not to receive copies of e-mails to clients.

Customize "Your Agent's Info" Box

Return to Account Home

Select the information you would like to display on your Agent Info box. Click on the 'Preview Results' button to view how it will appear on the website. Click the Save Changes button when you have finished configuring your settings.

- [x] First Name: Mary
- [x] Last Name: Smith
- [x] Email Address: msmith@insuranceplans.com
- [ ] Agency: The Smith Agency
- [ ] Agent ID: P00072701
- [ ] Address: 123 Horizon Ave , Best Town , OR , 90000
- [x] Phone Number: 123-456-7891 , ext. 123
- [ ] Fax Number: 123-456-7892
- [ ] Web Site: http://www.smithagency.com

Your Agent's Info
Mary Smith
P 123-456-7891
ext. 123
Email me

PREVIEW RESULTS

Username:	msmith
Email Address:	msmith@insuranceplans.com
First Name:	Mary
Last Name:	Smith
Agent ID:	P00072701
Agency:	The Smith Agency
Street Address:	123 Horizon Ave
City:	Best Town
State:	OR
Zip:	90000
Phone Number:	(123) 456 - 7891 Ext. 123
Fax Number:	(123) 456 - 7892
Web Site:	www.smithagency.com

Copy me on emails sent to my client(s): [x]

Client Search

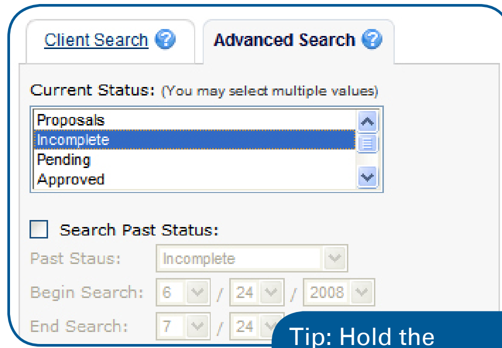
1. Enter at least the first letter in both the First Name and Last Name fields. You may leave Email Address field blank or enter just the first few characters.
2. Click Search.

The query will match any member on the application, including children and spouses.

Advanced Search

Find a set of applications by status:

1. Select a Current Status, such as Incomplete.
2. Search Past Status (optional): Select Any Status in the Current Status menu. Enter begin and end dates, up to a 90 day range.
3. Select a product or Any Product.
4. Select a type or All.
5. Click Search.

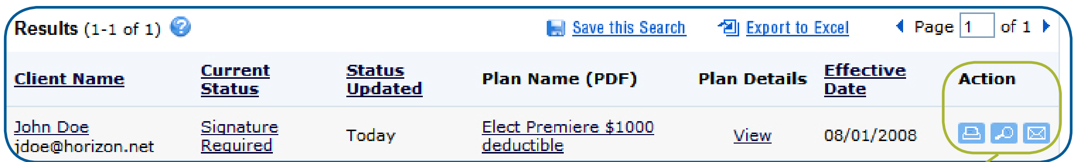


Tip: Hold the Ctrl key to select multiple statuses.

Results Page

Sort by heading: Click an underline to sort by that criteria.

Details: Click on the underlined items in a row to see details.



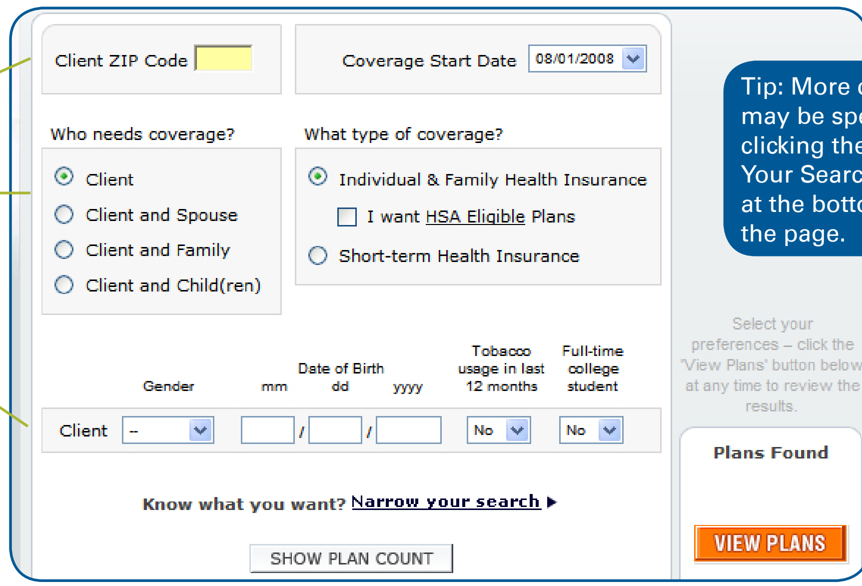
Action: Print the application, view the application, e-mail your client.

Generate a Quote

Get a list of plans by entering basic client information in Quote XP:

1. Enter client ZIP code.
2. Indicate who needs coverage.
3. Enter basic demographic data about the client and, if applicable, the client's family.
4. Click View Plans to continue to the Quotes page.

You can specify an alternate coverage start date and other options, but these are not required to generate a proposal.

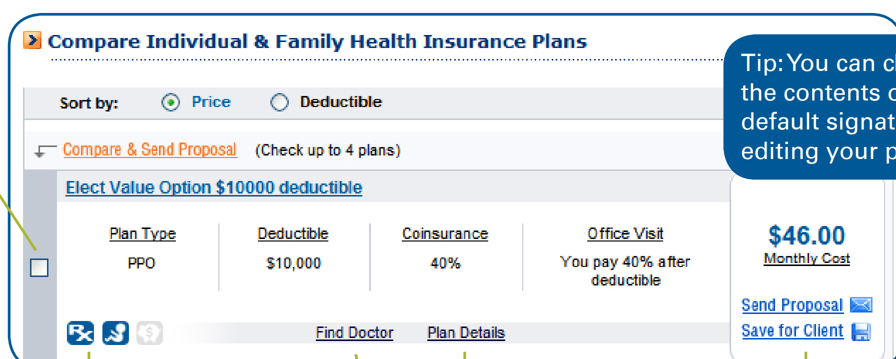


Tip: More criteria may be specified by clicking the Narrow Your Search link at the bottom of the page.

Quotes Page

Each row or box contains information for one plan. Create the proposal:

1. Click the **checkboxes** to select up to 4 plans.
2. Click Compare & Send Proposal to create a proposal with 1–4 plans.
3. Review the benefit details.
4. Click Send Proposal to continue or click Save for Client to finish later.
5. Enter or verify the information. The message may be customized, but the text link to the plan information must not be changed.
6. Click Send.



Tip: You can change the contents of your default signature by editing your profile.

Blue icons show special plan features: prescription coverage, maternity coverage, or HSA-eligibility.

Plan Details
View plan benefits.

Find Doctors near an address, such as the client's home.

Send Proposal
Save for Client
Send or save a proposal for only this plan.

PacificSource
HEALTH PLANS