

User Role Access Matrix

MARKETPLACE QUOTING FOR GENERAL
AGENCY ADMIN AND
PRODUCER/AGENT

User Role Descriptions

User Role	Description
General Agency Admin	<ul style="list-style-type: none">• A General Agency Admin oversees Group activity within the platform while also assisting in the submission of Quotes for Sub-Agencies as an "Agent".• A General Agency Admin can generate reports for cases submitted by all Producers/Agents.• A General Agency Admin has ability to manage quotes associated with their sub-agencies - including reopening, editing and withdrawing.• A General Agent can complete a quote for their designated Market Segment(s) from start (Creating Quote) to finish (Post Enrollment Review).
Producer/Agent	<ul style="list-style-type: none">• A user who quotes and assists customers in applying for coverage.• Producers only have access to the cases they are assigned to as "case owner".• <i>Please note: A producer role can also be referred to as a broker or agent.</i>

User Access Matrix

User Management

<i>Functionality and Permissions</i>	General Agency Admin	Producer/Agent
Create Sub-Agencies	✓	N/A
Update Agency Info	✓	N/A
Create New Users	✓	N/A
Activate Users	✓	N/A
Deactivate Users	✓	N/A
Remove User from Agency	✓	N/A
Update User Info	✓	N/A

Dashboard (New Business)

<i>Functionality and Permissions</i>	General Agency Admin	Producer/Agent
Global search	✓	✓
Recent activities	✓	✓
Activity snapshot	✓	✓
Recent updates	✓	✓
Work Queue	✓	✓

New Business Quoting

<i>Functionality and Permissions</i>	General Agency Admin	Producer/Agent
Create prospect	✓	✓
Enter quote profile data	✓	✓
Owner assignment	✓	N/A
Industry code search	✓	✓
Add additional locations	✓	✓
Create categories	✓	✓
Select product lines	✓	✓
Manually add census	✓	✓
Send census template to employer	✓	✓
Import census	✓	✓
Manually add census	✓	✓
Send plans for underwriting review	✓	✓
View plans	✓	✓
View available plans	✓	✓
Compare plans	✓	✓
Select plans	✓	✓
Customize plans	✓	✓
View rate breakdown	✓	✓
Generate / Send Proposal	✓	✓
Submit Quote for enrollment	✓	✓
Withdraw Quote	✓	✓

Edit Quote by Status

<i>Functionality and Permissions</i>	General Agency Admin	Producer/Agent
Quote Status = Quoting	✓	✓
Quote Status = Withdrawn	✓	✓
Quote Status = Submitted for review	N/A	N/A
Quote Status = In Review	N/A	N/A
Quote Status = Approved	N/A	N/A
Quote Status = Accepted	N/A	N/A
Quote Status = Expired	N/A	N/A

View Quote by Status

<i>Functionality and Permissions</i>	General Agency Admin	Producer/Agent
Quote Status = Quoting	✓	✓
Quote Status = Proposal generated	✓	✓
Quote Status = Withdrawn	✓	✓
Quote Status = Final rates review	✓	✓
Quote Status = Final rates ready	✓	✓
Quote Status = Enrollment initiated	✓	✓
Quote Status = Expired	✓	✓

View Enrollment by Status

<i>Functionality and Permissions</i>	General Agency Admin	Producer/Agent
Enrollment Status = Employer app in progress	✓	✓
Enrollment Status = Employer app completed	✓	✓
Enrollment Status = Withdrawn	✓	✓
Enrollment Status = Submitted for review	✓	✓
Enrollment Status = Reviewing	✓	✓
Enrollment Status = Approved	✓	✓
Enrollment Status = Accepted	✓	✓
Enrollment Status = Expired	✓	✓

Locked Quote

<i>Functionality and Permissions</i>	General Agency Admin	Producer/Agent
View Quote	✓	✓
View Quote Profile	✓	✓
View Locations	✓	✓
View Census Details	✓	✓
View Selected Plans	✓	✓
View Selected Plan Rates	✓	✓
View Proposal PDF	✓	✓
Generate/Send Proposal	✓	✓

Enrollment – Start Group Enrollment

<i>Functionality and Permissions</i>	General Agency Admin	Producer/Agent
Initiate an Enrollment	✓	✓
Manually update census	✓	✓
Import Census	✓	✓
Replace census	✓	✓
Select Plan offerings	✓	✓
Complete employer application	✓	✓
Industry code search	✓	✓
E-Sign Employer Application	✓	✓
Wet Signature Indicator for Employer	✓	✓
View completed employer application	✓	✓

Enrollment – Underwriting Enrollment Review

<i>Functionality and Permissions</i>	General Agency Admin	Producer/Agent
View employer application	✓	✓
View employee elections	N/A	✓
View Rates	✓	✓
Approve/Decline enrollment	N/A	N/A
Reopen enrollment	✓	✓

Billing and Payment Center

General Agency Admins and Producer/Agents will have view only permissions and will have the ability to view invoices in the Billing and Payment Center on the tool. The report access list is below.

	Description	General Agency Admin	Agency Admin	Producer/Agent
<i>Administration</i>				
Active User Accounts	Includes details about active user accounts	✓	✓	✓
User Account Changes	Includes details about user account changes within a specified time period	✓	✓	✓
Message Center Notification Aggregate Report	Includes details of messages sent to employees via the Message Center	✓	✓	✓
<i>General</i>				
Open Enrollment Activity	Shows Activity of groups currently in open enrollment	✓	✓	✓
Group Lockout	Provides details of groups with denied system access	✓	✓	✓
Enhanced Benefit Credits Program	Includes benefit program credit information on a per employee basis	✓	✓	✓
<i>Sales Activity</i>				
Sales Activity	Provides details of sales activity for each agent including prospect acceptance status with the option to display a rejection reason (when applicable).	✓	✓	N/A
Sales Pipeline	Provides overview of the sales pipeline for each agent including number of prospects in each workflow status and number of days in the current status	✓	✓	N/A
Prospect Activity	Provides details of prospect activity for a given month	✓	✓	N/A
<i>Aggregate Benefit</i>				
Aggregate Benefit Summary	Includes cost and enrollment summary information for each plan and coverage level	✓	✓	✓
Aggregate Benefit Details	Includes cost and enrollment information for each covered person	✓	✓	✓
Aggregate View-Only Benefit Details	Includes view-only benefit cost and information per employee for each benefit type	✓	✓	✓
Evidence of Insurability (EOI)	Includes detailed information regarding the coverage amount that the member requested for a certain benefit type(s)	✓	✓	✓
Aggregate Beneficiary	Includes information about beneficiaries in the selected Groups	✓	✓	✓
<i>Aggregate Census</i>				
Aggregate Employee Census		✓	✓	✓
Aggregate Dependent Census	Includes basic information for dependent spouses and/or children	✓	✓	✓
Aggregate Login ID	Includes employee login ID information for all person	✓	✓	✓

Email Notifications

Email notifications will be sent to following types of users based on their direct ownership of a company or activity. Any account specific updates or changes such as Password changes and resets will go to the account affected by the update/request.

Email Notification	Email Trigger	General Agency Admin	Producer/Agent
Reset Login Information	Reset of password performed by User Admin	N/A	✓
Change Password	User utilizes the change password function	N/A	✓
Send census template	Choose to have census template sent during quoting workflow	N/A	✓
Notification for Group Setup complete	Upon submitting a group, sent when build of group is done within Enrollment Center	N/A	✓
Enrollment status changed to submitted for review	Once quote is submitted from Overview page after End Data collection	N/A	✓
Enrollment status changed to Reviewing	UW / UW Manager assigns themselves to a quote which is in the Submitted for Review status	N/A	✓
Enrollment status changed to Approved	UW / UW Manager approves quote	N/A	✓
Enrollment status is changed to Accepted	Updated when sMax is generated and sent to Premera	N/A	✓
Enrollment status is changed to Live	Upon receiving the Bring-Live gMax for the group	N/A	✓
Enrollment status is changed to Reopened	When an UW / UW Manager does not approve and sends quote back to the Agent	N/A	✓
Enrollment status is changed to Declined	UW / UW Manager declines the quote	N/A	✓
Enrollment status is changed to Canceled	When the quote withdrawn during the workflow	N/A	✓
Notify agent on email address update	Sent when an email address is updated on a agent	N/A	✓
Renewal Notification	Sent when rMax setups a group for Renewal	N/A	✓
Enrollment status is changed to Agent Review	After End Data Collection where either rates have changed or plans no longer available	N/A	✓
Plans Unavailable – Third Rating Call	Once user has ended Data Collection and upon coming back into Marketplace and going through Third Rating Call group is no longer seen as eligible for plan	N/A	✓
Rates Have Changed – Third Rating Call	Once user has ended Data collection and upon coming back into Marketplace and going through the Third Rating Call the group now has rate changes	N/A	✓
Rates No Longer Available – Third Rating Call	Once user has ended Data collection and upon coming back into Marketplace and going through the Third Rating Call the group now there are no rates returned	N/A	✓