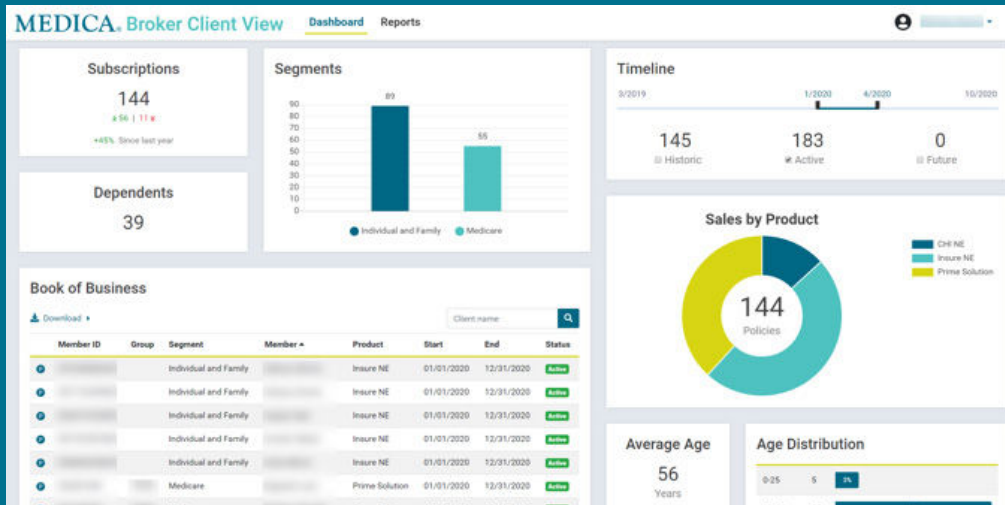


BROKER CLIENT VIEW
USER GUIDE

INTRODUCTION



Broker Client View (BCV) is Medica’s book of business dashboard. BCV features intuitive navigation in a secure environment with powerful data-driven functionality. This self-service tool offers opportunities for brokers to support their Medica members and to grow and retain clients.

BCV displays Medicare and Individual & Family members. Medicare enrollment receipts and enrollment issues can be accessed in the Broker Portal, under Medicare Enrollment Receipts.

Table of Contents

[Accessing Broker Client View | Page 3](#)

[Dashboard Navigation | Page 4](#)

[Reports | Page 6](#)

[See the Agency/FMO View User Guide | Page 7](#)

ACCESSING BROKER CLIENT VIEW

Step 1

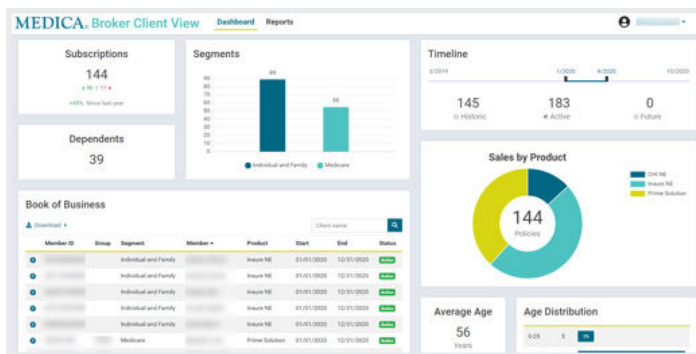
Open a web browser and access the Medica Broker Portal by going to **medica.com/Brokers**.

Step 2

Select *Broker Client View*.

Step 3

Your Broker Client View dashboard will display.



DASHBOARD NAVIGATION

Book of Business

Use the Download function to download full Medica book of business membership data to an Excel spreadsheet. Options include downloading data with filters applied and the ability to Download All (without filters). Additional member data fields appear in the downloaded book of business report, including Individual & Family members' premium billing information. Member details can also be found by clicking on the Member ID in the dashboard.

SECTION	DESCRIPTION
Client name	Filter by client name
Member ID	Select the Member ID to access Member Details
Group	Medica group number - only applies to Medicare plans
Segment	Medicare Individual & Family Business
Member	Name of member
Product	Medica product name
Start	Policy effective date
End	Policy end date
Status	Historic, Active or Future

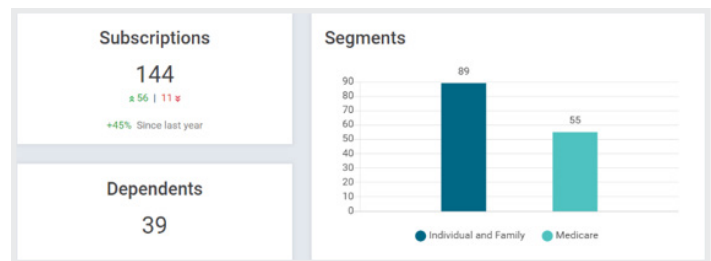
Book of Business

Download ▾ Client name

Member ID	Group	Segment	Member	Product	Start	End	Status
1		Individual and Family		Insure NE	01/01/2020	12/31/2020	Active
2		Individual and Family		Insure NE	01/01/2020	12/31/2020	Active
3		Individual and Family		Insure NE	01/01/2020	12/31/2020	Active
4		Individual and Family		Insure NE	01/01/2020	12/31/2020	Active
5		Medicare		Prime Solution	01/01/2020	12/31/2020	Active
6		Medicare		Prime Solution	01/01/2020	12/31/2020	Active
7		Medicare		Prime Solution	01/01/2020	12/31/2020	Active
8		Medicare		Prime Solution	01/01/2020	12/31/2020	Active
9		Individual and Family		CHI NE	01/01/2020	12/31/2020	Active
10		Individual and Family		CHI NE	01/01/2020	12/31/2020	Active

Subscription Counts

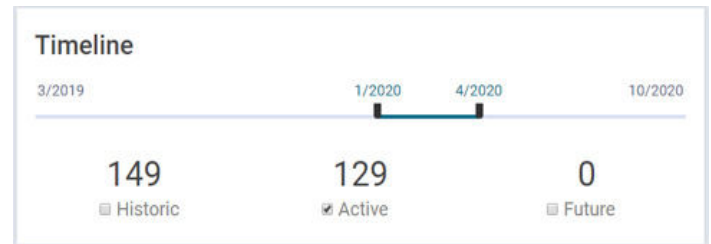
SECTION	DESCRIPTION
Subscriptions	Total count of subscriptions
New Business	Calculates increased subscriptions from last year to this year
Lost Business	Calculates the number of subscriptions present last year that no longer appear this year
Dependents	Total count of dependents
Segments	Count of subscriptions by segment



Timeline

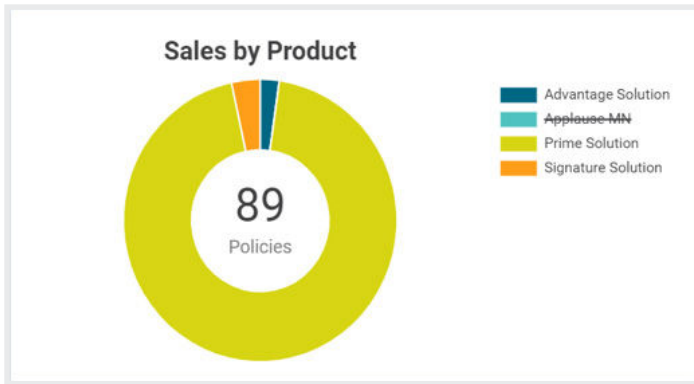
Filter the timeline to display:

- » Historic
- » Active
- » Future



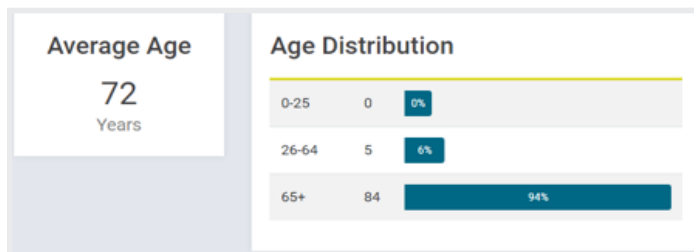
Sales by Product

This is a visual representation of sales by product based on total policy count (number of records in the book of business).



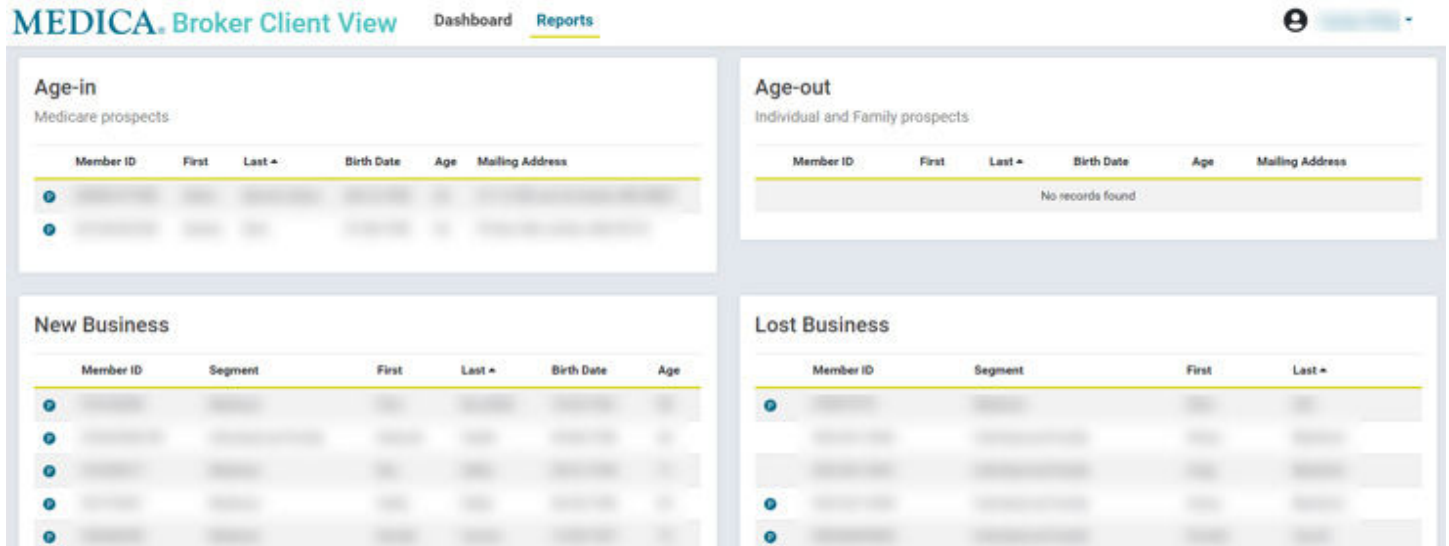
Age Distribution

SECTION	DESCRIPTION
Average Age	Calculates average age of clients
Age Distribution	Distribution of clients by age categories



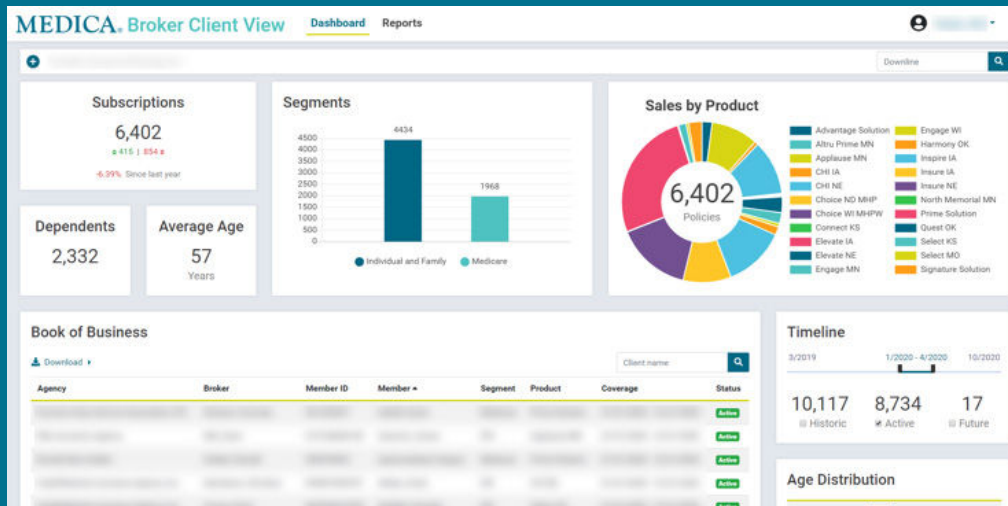
REPORTS

Use the Broker Client View Reports to increase retention and to help your clients transition to their next phase of health insurance needs.



SECTION	DESCRIPTION
Age-In: Medicare Prospects	Displays list of Individual & Family Business clients who are age 64 and a half.
Age-Out: Individual & Family Prospects	Displays list of Individual & Family Business dependents who are approaching age 26.
New Business	Calculates increased subscriptions from last year to this year.
Lost Business	Calculates the number of subscriptions present last year that no longer appear this year.

AGENCY/FMO VIEW



The Agency and Field Marketing Organization (FMO) view of Broker Client View enables the Head of Agency or the Head of an FMO the ability to view their total book of business and the book of business associated with their downline agencies and brokers.

Broker Client View (BCV) is Medica's book of business dashboard. BCV features intuitive navigation in a secure environment with powerful data-driven functionality. This self-service tool offers opportunities for brokers to support their Medica members and to grow and retain clients.

BCV displays Medicare and Individual & Family members. Medicare enrollment receipts and enrollment issues can be accessed in the Broker Portal, under Medicare Enrollment Receipts.

Table of Contents

[Accessing Broker Client View | Page 8](#)

[Dashboard Navigation | Page 9](#)

[Reports | Page 11](#)

ACCESSING BROKER CLIENT VIEW

Step 1

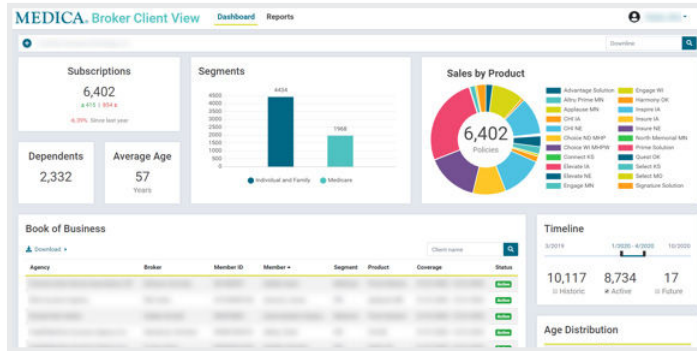
Open a web browser and access the Medica Broker Portal by going to **medica.com/Brokers**.

Step 2

Select *Broker Client View*.

Step 3

Your Broker Client View dashboard will display.



Downline Filter

Expand the downline filter to narrow down the book of business view by specific broker, head of agency or agency. Filtering will change the dashboard view to be specific to the book of business currently displayed. Use this function to support your downline brokers and their clients.

SECTION	DESCRIPTION
	Display or collapse downline filter
	Agency
	Head of Agency
	Broker
<input type="text" value="Downline"/>	Filter by name of broker, head of agency or agency

DASHBOARD NAVIGATION

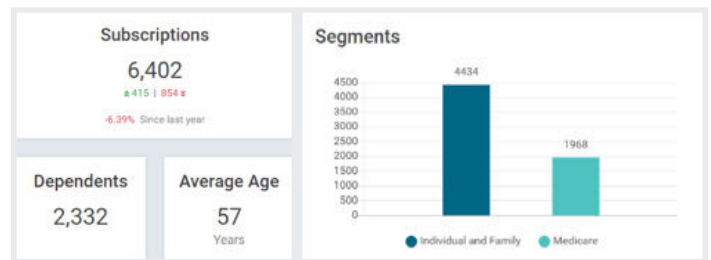
Book of Business

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SECTION	DESCRIPTION
Agency	Name of agency
Broker	Name of broker
Member ID	Select the Member ID to access Member Details
Member	Name of member
Segment	Medicare Individual & Family
Product	Medica product name
Coverage	Policy effective date
Status	Historic, Active or Future

Subscription Counts

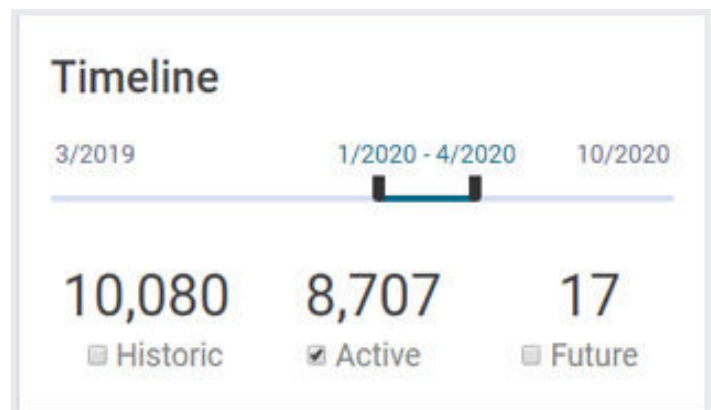
SECTION	DESCRIPTION
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Dependents	Total count of dependents
Average Age	Calculates average age of clients
Segments	Count of subscriptions by segment



Timeline

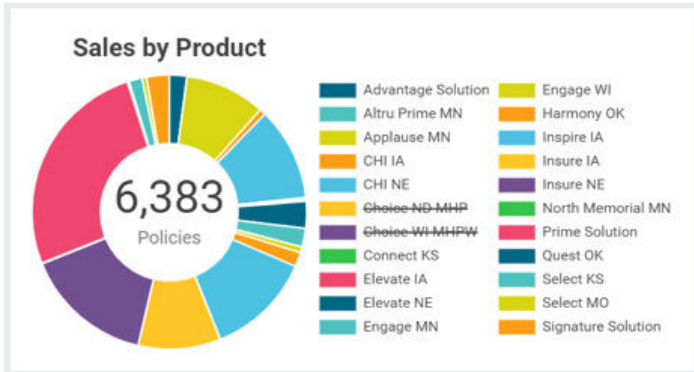
Filter the timeline to display:

- » Historic
- » Active
- » Future



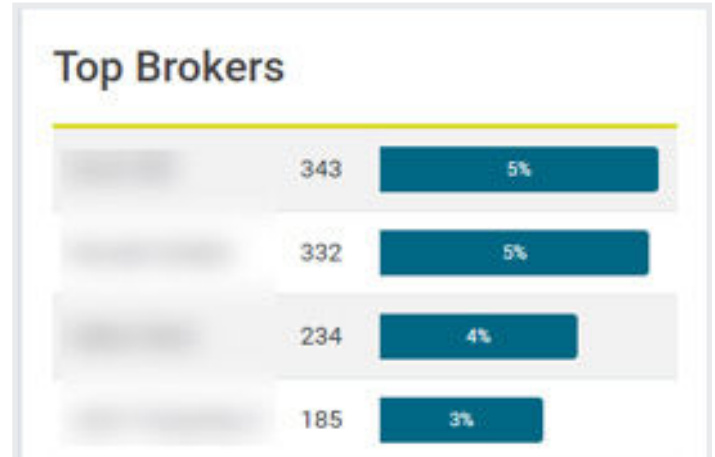
Sales by Product

This is a visual representation of sales by product based on total policy count (number of records in the book of business).



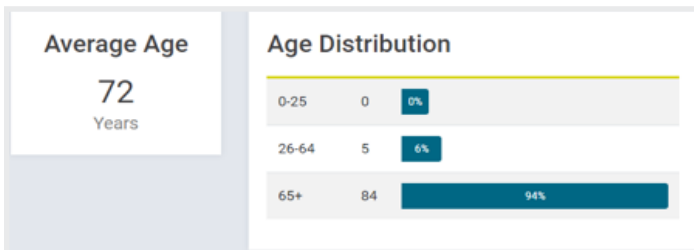
Top Brokers

SECTION	DESCRIPTION
Top Brokers	Top brokers by sales




Age Distribution

SECTION	DESCRIPTION
Age Distribution	Distribution of clients by age categories



REPORTS

Use the Broker Client View Reports to increase retention and to help your clients transition to their next phase of health insurance needs.

MEDICA Broker Client View Dashboard Reports 

Age-in

Medicare prospects

Member ID	First	Last	Birth Date	Age	Mailing Address
1					
2					

Age-out

Individual and Family prospects

Member ID	First	Last	Birth Date	Age	Mailing Address
No records found					

New Business

Member ID	Segment	First	Last	Birth Date	Age
1					
2					
3					
4					
5					

Lost Business

Member ID	Segment	First	Last
1			
2			
3			
4			
5			

SECTION	DESCRIPTION
Age-In: Medicare Prospects	Displays list of Individual & Family Business clients who are age 64 and a half.
Age-Out: Individual & Family Prospects	Displays list of Individual & Family Business dependents who are approaching age 26.
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QUESTIONS?
CONTACT US.



Contact your Sales Relationship
Manager or Broker Services.

1-866-752-0945



BrokerServices@medica.com

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