


NatGen Coverage Builder


Table of Contents

<u>Quick Quote Walkthrough</u>	Page 2
<u>Enrolling a Client</u>	Page 4
<u>Creating a Proposal</u>	Page 7
<u>CRM (Customer Records Manager)</u>	Page 8
<u>Inside a Contact</u>	Page 10
<u>Contact Information</u>	Page 11


3. Enter in client's zip code and select **GO**




Quote and Enroll
Run a quote without first creating a contact record.



Add New Individual Contact
Enter all the information required to create a new individual contact. This is the first step in creating a new proposal.



Plan Benefit Details
Compare Side by Side, Email or Print Individual Health, Dental or Medicare plan benefits.



View Individual Contacts
Search by Name, Phone, Email, Zip Code or view all contacts.

4. Enter in the **Gender, DOB and Tobacco Usage** for each member to be included on the policy.

- To add additional dependents, press **+ Add More Dependents**.
- Select **Start coverage on date**, **coverage term**, and **payment method** for your client.

Quick Quote

Zip Code: 75201

Census Information

	Relationship	Zip Code	County	Gender	DOB	Tobacco Usage
Applicant:	Self	75201	DALLAS	M ▼	<input type="text"/>	<input type="checkbox"/>
Spouse:	Relationship ▼	75201	DALLAS	F ▼	<input type="text"/>	<input type="checkbox"/>
Dependent 1:	Relationship ▼	75201	DALLAS	M ▼	<input type="text"/>	<input type="checkbox"/>
Dependent 2:	Relationship ▼	75201	DALLAS	M ▼	<input type="text"/>	<input type="checkbox"/>

+ Add More Dependents

Start coverage on: Short-Term coverage up to: ▼ Payment Method: ▼

Please note all carriers may not offer repeating short-term enrollments.

5. You will be directed to a page with a pre-set package
 - a. You can select **Enroll Now**, to enroll them in the selected package
 - b. Or, select **See All Plans** to build your own package

The screenshot shows the 'Choose Package' interface. At the top right, there is a 'New Proposal' button. Below it, a 'See All Plans' button is circled in red and labeled 'b'. The main content area displays a 'Florida Package' summary with a table of products and their premiums. On the right, there is a 'Payment Summary' section. At the bottom of the package details, an 'Enroll Now' button is circled in red and labeled 'a', along with a 'Create Proposal' button and 'View Details' and 'Customize' links.

6. If you choose to build your own package, you will be directed to the **Product Selection page**, where the Products available in requested zip code and client age bracket will populate
 - a. Product tabs at the top let you select product type
 - b. Filters let you narrow down product selection
 - c. ADD will add a product to your cart
 - d. Cart shows what products are currently chosen for the customer

The screenshot shows the 'Product Selection' page. At the top, there are product tabs: Dental (9), Short Term (12), Limited Medical (8), Accident (32), Critical Illness (5), Ancillary (5), and Cancer (4). Below the tabs is a 'Filters' section (labeled 'b') with options for Company, Plan Type, and Deductible. The main area is a table of products with columns for Plan Name, Deductible, OOP Max, Office, Hospital, Rx, and Premium. Each row has an 'ADD' button (labeled 'c'). On the right side, there is a 'Plans in Cart: 0' section (labeled 'd') with 'Enroll Now' and 'Create Proposal' buttons.

7. From the Cart, there are two options:
 1. [Enroll Now](#) – Lets you enroll the client in the selected products in the cart
 2. [Create proposal](#) – Lets you make a pdf for the email option to send to your customer. Once your client receives the email, they can self-enroll.

Plans in Cart: 2
[Remove All]

Dental

National General Dental Indemnity
Dental Basic
IND
\$15.50 /mo

Short-Term Health

NHIC - National General
Short Term Medical 5k, 80/20
PPO
\$327.32 /mo
One-Time Fee: \$35.00

\$377.82
Amount due today
\$342.82
Monthly total

Enroll Now Create Proposal

8. Enrolling your client
 1. Enter client's email

Please enter a family contact email.

Email: OK

9. The next page will show what to expect for next steps. **Press Continue**

You will be directed to the final confirmation page

You're Done!

All required coverage information has been collected. A notification has been sent to the consumer for them to eSign the application. Once the application has been signed it will be sent to the carrier for processing.

Dental Basic			
View PDF	Product Type	Effective Date	Enrolling Members
	Dental	4/13/2018	test

Short Term Medical 5k, 80/20			
View PDF	Product Type	Effective Date	Enrolling Members
	Short Term	4/13/2018	test


[Account Dashboard](#)

14. Your client will receive an email requesting the review of the Application and Bill Authorization and a request for their eSignature confirming the sale

NOTE: You can find your client's application numbers in the NatGen Agent Back Office


3. Customer Records Manager (CRM) tool

1. Add a new customer from scratch
2. View clients you have quoted




Quote and Enroll


Run a quote without first creating a contact record.



Add New Individual Contact
Enter all the information required to create a new individual contact. This is the first step in creating a new proposal.



View Individual Contacts
Search by Name, Phone, Email, Zip Code or view all contacts.



Plan Benefit Details
Compare Side by Side, Email or Print Individual Health, Dental or Medicare plan benefits.

4. Add New Individual Contact, enter

- ✓ First Name, Last Name,
- ✓ Phone Email
- ✓ Address
- ✓ Those on the policy

Select Create Contact

1 **Primary Contact Information**

*First Name:

Last Name:

Phone:

Email:

Annual Household Income: \$

Household Size:

Tax Filing Status:

2 **Location**

Street Address:

City:

*Zip Code:

County:

3 **Census Information**

	Relationship	Zip Code	County	Gender	DOB	Height	Weight	Tobacco Usage i
Applicant:	Self	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	M v	<input style="width: 100%;" type="text"/>	ft in	lbs	<input type="checkbox"/>
Spouse:	<input style="width: 100%;" type="text" value="Relationship"/>	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	F v	<input style="width: 100%;" type="text"/>	ft in	lbs	<input type="checkbox"/>
Dependent 1:	<input style="width: 100%;" type="text" value="Relationship"/>	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	M v	<input style="width: 100%;" type="text"/>	ft in	lbs	<input type="checkbox"/>
Dependent 2:	<input style="width: 100%;" type="text" value="Relationship"/>	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	M v	<input style="width: 100%;" type="text"/>	ft in	lbs	<input type="checkbox"/>

+ Add More Dependents

Contact view (after you enter their first or last name)

Contact Info Edit

Name:

Email: test@test.com

Home: Work:

Work: Fax:

Cell: Cell:

Best Time to Call:

Address: [TX 75201/DALLAS](#)

Preferred Language: English

Record Type (Owner): Private (Daniel)

Print | Email Edit

Created: 3/21/2018 8:51:43 AM - Daniel Wray

Last Modified: 3/21/2018 8:51:43 AM - (Daniel Wray)

Source: Quick Quote

Category: Client's personal information

Status:

Insurance Type: Dental Insurance

IP Address: 50.235.12.138

Census Information + Add/Edit Family Members

Name	Age	DOB	Zip Code	Gender	Tobacco	Enrollment				
						H	D	V	L	
	48	1/1/1970	75201	M	No	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

Health Dental Vision Life LTC A Contact Notes

What proposals you have sent out to them

Proposal History

Created	Included in Quote	Type	Effective	Plan Count

Email History

Sent	To	Subject	Generated By	Viewed	Resend

Past Applications

Application History + Add New Application

Date	Applicants	Plan Count	Total Premium	View Detail	Login	Reset Password
03/21/2018		2 Carriers, 2 Plans	\$276.31	View Detail	Login	Reset Password

Attachments + Add File

Name	Document Type	Applicable To	Size	Date/Time	Delete

Questions, please

Call: (833) 870-6137

Or,

Email: CoverageBuilderSupport@NGIC.com