

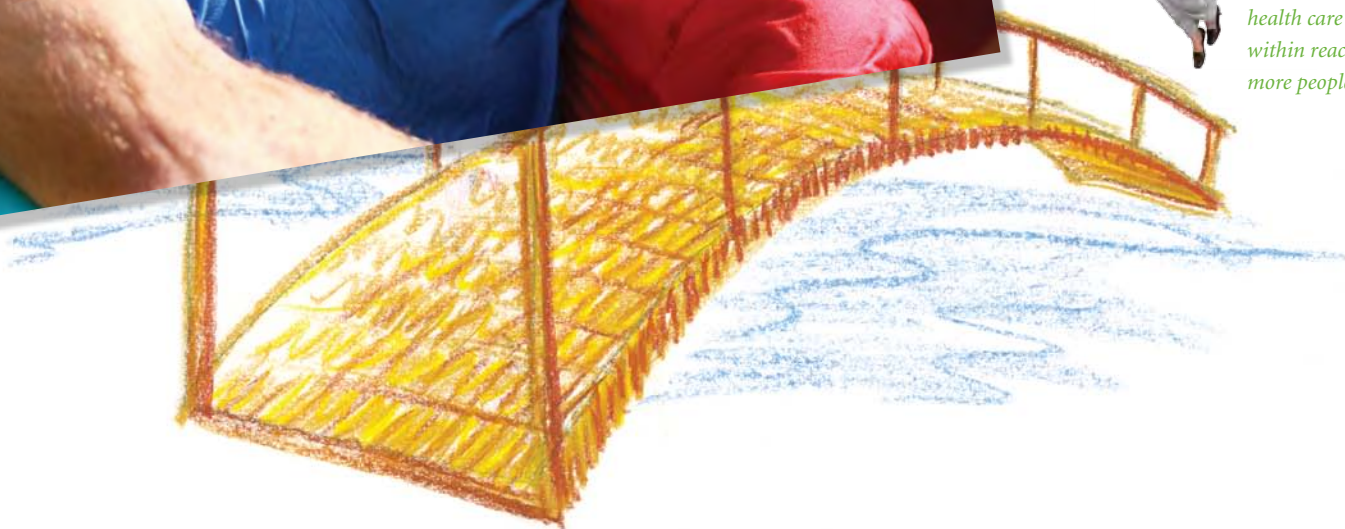
Plans for Individuals & Families and Group  
California and Oregon/Washington

# *Broker* Book of Business Tool

*New enhancements make managing your business online even easier!*



**Josefina Bravo,  
Health Net**  
*We put affordable  
health care coverage  
within reach of  
more people.*



Health Net®

# Simple *to Use* Easy *to Understand*



Your book of business is available online. We know it can be challenging to manage your individual and group accounts. Our Book of Business feature gives you the tools you need to make doing business easier. And best of all, you get results quickly and conveniently.

It's easy to view your Health Net business in ways that work for you. With user-friendly search features, you'll save time by going straight to the information you need right when you need it. Start using our Broker Book of Business tool today:

- Log on to your broker account at **[www.healthnet.com](http://www.healthnet.com)**.
- Click on Book of Business in the left-hand navigation.
- Select Plans for Individual & Families or Group.

## Look for these NEW added features:

- Contracted brokerage firms can now grant specific access to their brokers.
- New billing, rate and renewal information added – all on one convenient tab.
- New Alerts – plus search by Alert Type.
- Group renewal alert now posted 60 days prior to renewal.



**Herminia Escobedo,**  
**Health Net**  
*We bring smart value to  
businesses large and small.*

## Plans for Individuals and Families

### 1 Search options

Choose your search options to view your individual client status.

- Subscriber name
- **Subscriber ID**  
(member identification / R #)
- Plan name
- Plan type (use drop-down menu)
- OED (original effective date)
- Plan effective date
- Cancellation date
- Status (use drop-down menu)

### 2 NEW! Search by alert type (use drop-down menu)

### 3 NEW! Link to Broker Activity History has been added giving you a quick shortcut to check your pending business.

### 4 NEW! Alerts legend helps you understand what each of the Alert icons mean.

#### Search results

Sort your results based on your business need – by subscriber name, subscriber ID, plan type, plan effective date, whatever your preference.

### 5 Subscriber details tab

Click on a subscriber name to get the demographic detail for each individual, including:

- Plan type
- Address
- Plan name
- Date of birth
- Plan effective date
- Age
- Cancellation date
- Monthly premium
- Paid through date

### 6 Dependent details tab

Click on this tab to view details for each of the dependents.

The screenshot shows the Health Net 'Plans for Individuals & Families' interface. It includes a search filter section with fields for Subscriber Name, Subscriber ID, Plan Name, Plan Type, Alert Type, Plan Effective Date, Cancellation Date, and Status. A table lists subscribers with columns for Subscriber Name, Subscriber ID, Plan Type/Plan Name, OED, Plan Effective Date/Cancellation Date, Status, Broker ID, and Alerts. A callout box explains alert icons: a red 'S' for rate increase, a green 'S' for delinquent future payment, and a green 'R' for renewal. A callout points to a 'DOE, JOE' link in the table. Another callout shows the 'Subscriber Details: JOE DOE' page with tabs for Subscriber Details, Dependent Details, and Billing/Rate/Renewal Information. A final callout shows the 'Subscriber Details: JOE DOE' page with a table of dependents.

Subscriber Name	Subscriber ID	Plan Type/Plan Name	OED	Plan Effective Date/Cancellation Date	Status	Broker ID	Alerts
DOE, JOHN	R0000100	OR-PPO INDIVIDUAL/IP12345/09GF w/IFPACP	01/01/2001	12/01/2004 08/31/2006	Cancelled	Z123	\$ S
DOE, JANE	R0000200	OR-PPO INDIVIDUAL/IP12345/09GF w/IFPACP	02/15/2008	02/15/2008 04/30/2011	Cancelled	Z123	\$ S
DOE, MARY	R0000300	OR-PPO INDIVIDUAL/IP12345/09GF w/IFPACP	04/01/2004	04/01/2004 01/31/2008	Cancelled	Z123	\$ S
DOE, JOE	R0000400	OR-PPO INDIVIDUAL/IP12345/09GF w/IFPACP	05/01/2006	05/01/2006	Cancelled	Z123	\$ S

Name	Relation	Physical Address	DOB	Age	Status	Min Eff Date	OAD
DOE, JOHNNY	Child	123 FIRST STREET SACRAMENTO, CA 95670	01/24/95	16	Cancelled	03/01/05	No
DOE, TAMMY	Child	123 FIRST STREET SACRAMENTO, CA 95670	08/02/97	13	Cancelled	03/01/05	No

### Not registered?

Go to [www.healthnet.com/broker](http://www.healthnet.com/broker) and click on *Register Now* to begin setting up your secure user account.

Once registered, start using the Broker Book of Business tool and all of the useful services available at [www.healthnet.com](http://www.healthnet.com).

## 7 NEW! Billing / Rate / Renewal information details tab

Click this tab to find payment information, including:

- Due date
- Amount due
- Balance due
- Last payment made
- Past premium amount
- Current premium
- Balance forward from current bill
- Amount paid
- Premium payment method
- Consolidated billing (Yes/No)
- % of rate change (N/A if no rate change within the past 60 days)

7



SUBSCRIBER DETAILS		DEPENDENT DETAILS		BILLING / RATE / RENEWAL INFORMATION	
OED ?	05/01/2006	Bill Type ?	Standard billing	Current Premium ?	\$301.00/month
Plan Effective Date	05/01/2006	Past Premium Amount	\$301.00/month	% of Rate Change	%
Cancellation Date		Payment Method		Consolidated Billing	N
Cancellation Effective Date					
Status	Active				
Balance Forward from Current Bill	\$301.00				
Due Date	12/01/2011				
Amount Due ?	\$301.00				
Balance Due ?	\$602.00				
Last Payment Made	11/23/2011				
Amount Paid	\$-350.00				

### Download or print your results

Your clients' accounts can be easily downloaded to Excel or printed in hard copy. Click on the *Download Excel/CSV* and the *Print Page* icons.

## NEW for registered brokerage firms and GAs

Now you can allow access to brokers registered under your firm's ID. Set up and delegate which areas of Book of Business you want your brokers to have access to in order to help them manage their accounts. To set up your brokers, go to *Manage Accounts > Manage Broker Accounts*. The brokers for whom you have registered, using your Association ID Number, will be displayed.

Select the broker name you are allowing or denying access for and check the roles you are delegating:

- New business quote & proposal (SBG)
- New business quote activity (SBG)
- Quoting profile/Underwriting (SBG)
- Renewal quote activity (SBG)
- SBG Renewals
- Book of Business (IFP and Group)
- IFP Activity History
- View Book of Business commission data (IFP and Group)



Aristotle Ibay,  
Health Net

*We give you more ways  
to fuel sales.*

## Group Business

### 1 Search options

Choose your search option to view your group client status.

- Group name
- Parent group ID
- Group suffix ID
- Status (use drop-down menu)
- Renewal will be due within 60 days
- OED (original effective date)
- Renewal date
- Plan name
- Plan type (use drop-down menu)

### 2 NEW! Search by alert type (use drop-down menu)

NEW! Alerts legend helps you understand what each of the Alert icons mean.

### 3 NEW! Select this link to download an Excel spreadsheet containing the subscriber details for all active subscribers in all group suffixes tied to the parent group. You can then sort/save/print the data.

### Search results

Sort your results based on your business need – by group name, parent group ID, group suffix ID, OED, renewal date, status, whatever your preference.

### 4 Group details tab

Your search results come up quickly and are easy to read. Then just click on a group name to get the demographic detail for each group. The group details tab includes:

- Group number
- Group administrator
- Group administrator and billing addresses
- Contact numbers
- Group email
- Group state
- Cancellation date
- Waiting period
- Group status
- Active subscribers/members
- Cancelled subscribers

Health Net Book of Business Group

Book of Business overview information is available below. To view Subgroups for a given Group, please click on a Group name. To view Subgroup details, click the Subgroup name.

**Current Search Filter**

You can modify your search by entering or changing values below and clicking Submit.

Group Name:  OED:  to

Parent Group ID:

Group Suffix ID:

Status:

Alert Type:

Renewal Date:  to

Plan Name:

Plan Type:

Renewal will be due within 30 days

Group Name	Parent Group ID	Group Suffix ID	OED	Renewal Date	Status	Plan Type/Plan Name	Broker ID	Alerts
BLUE CLOUD COMPANY	P00001	0824A	06/01/2010	06/01/2012	Active	OR-PPO SMALL GROUP	7000	
BLUE CLOUD COMPANY	P00001		06/01/2010	06/01/2012	Active	OR-PPO SMALL GROUP/A35-5000-2-3000/11NG	2000	
RAINYDAY COMPANY	P00002		06/01/2010	06/01/2012	Active	OR-PPO SMALL GROUP/A35-5000-2-3000/11NG	2000	
GREEN GRASS COMPANY	V00001		06/01/2011	06/01/2012	Active	OR-PPO SMALL GROUP	2000	\$
YELLOW SUN COMPANY	Y00002		10/01/2006	10/01/2011	Active	OR-PPO SMALL GROUP	2000	\$

To make it easier to quickly scan Alerts, Health Net has introduced icons to represent alert types.

- Individual or Group has Termined
- This subscriber may have had a rate increase within the last 60 days.
- Individual or Group is Delinquent. Future payment may be scheduled; hover over the icon for this individual or Group for more info.
- Group is up for Renewal within the next 60 days.

To see more information about an Alert, just move your mouse over the Alert icon.

Please note: Alerts are current as of 11/03/2011

Group Details: YELLOW SUN COMPANY

View Subscribers List

Download Subscribers List as an Excel Sheet

GROUP DETAILS

Parent Group Name: YELLOW SUN COMPANY

Suffix Name: YELLOW SUN COMPANY

Group Number: W0006

Group Admin: JOHN SMITH

Group Admin Address: 100 3RD STREET, SACRAMENTO, CA 95610

Group Billing Address: JOHN SMITH, 100 3RD STREET, SACRAMENTO, CA 95610

Group Phone Number: (916) 222-3333

Group State: CA

BILLING / RATE / RENEWAL INFORMATION

Waiting Period Non Management: First Of Month AFTER THIS DATE

Waiting Period Management: First Of Month AFTER THIS DATE

Group Status: Active

Active Subscribers: 1

Active Members (Subscriber + Dependents): 1

Cancelled Subscribers: 0

Book of Business: Group

Subscribers

Return to the main Group page

Book of Business Subscriber information is available below. To view details for a given Subscriber, including dependent information, please click on a Subscriber name.

Note: As before, renewals-related functionality is accessible via the Customer & Sales Support section in the left navigation.

Current Search Filter [Change](#)

All results are currently on display. To filter your results, click the 'change' link above.

Showing 1 - 3 of 3 Members

Subscriber Name	Subscriber ID	Plan Type/Plan Name	Status	Notes ID
JRMES, TIMOTHY	R00000000	CA-SMALL BUSINESS PLANS - PPO/STANDARD PPO 30	Active	
BROWN, CYNTHIA	R00000000	CA-SMALL BUSINESS PLANS - PPO/STANDARD PPO 30	Active	
SMITH, MIKE	R00000000	CA-SMALL BUSINESS PLANS - PPO/STANDARD PPO 30	Active	

## 5 View subscribers

Click on *View Subscribers List* to see all of the group's subscribers. Then click on the subscriber's name to view their detail, including their dependents.

## 6 NEW! Billing / Rate / Renewal information details tab

Click this tab to find payment information, including:

- Due date
- Amount due
- Balance due
- Last paid date
- Last payment made
- Current premium (shown at a group suffix level)
- Original effective date (OED)

5

**Subscriber Details: MIKE SMITH**

Subscriber Name	MIKE SMITH	Home Phone #	
Subscriber ID	MIKE SMITH	Work Phone #	(60) 555-0000
Plan Name	R0000000	Language Indicator (spoken)	(60) 555-0000
Plan Type	GOLD WINGS - Billing Only	County	ENGLISH
Status	CA-PREMIUM ADMINISTRATION (GRD PARTY ONLY GROUPS)	Rating Region	San Diego
DOB	Cancelled	CAL COBRA	NP?
Physical Address	09/17/1951	FED COBRA	No
	123 Hill St, VISTA, CA 92084		No

**Dependent Details: FOX LINDA**

Name	Relation	Physical Address	DOB	Age	Status	MB Eff Date	OED
SMITH, THOMAS	Child	123 Hill St, VISTA, CA 92084	02/02/92	18	Cancelled	02/01/07	No

6

**Group Detail: YELLOW SUN COMPANY**

[View Subscribers List](#)  
[Download Subscribers List as an Excel Sheet](#)

**GROUP DETAILS** | **BILLING / RATE / RENEWAL INFORMATION**

Renewal Month	July	Due Date	11/11/2011
Group Last Renewal Date	07/01/2010	Amount Due	\$2100.33
Waiting Period Non-Management	First Of Month AFTER 90 DAYS	Balance Due	\$1500.00
Waiting Period Management	First Of Month AFTER 90 DAYS	Last Paid Date	4/4/2011
Billing Contact Phone Number	(123) 555-1212	Last Payment Made	\$240.00
Cancellation Date		Current Premium	\$500
Cancellation Effective Date		Original Effective Date	1/1/2011
Parent Group effective date	07/01/2010		
Suffix effective date	07/01/2010		
Group Last Renewal Date	01/01/2011		

## NEW for registered brokerage firms and GAs

Now you can allow access to brokers registered under your firm's ID. Set up and delegate which areas of Book of Business you want your brokers to have access to in order to help them manage their accounts. To set up your brokers, go to *Manage Accounts > Manage Broker Accounts*. The brokers for whom you have registered, using your Association ID Number, will be displayed.

Select the broker name you are allowing or denying access for and check the roles you are delegating:

- New business quote & proposal (SBG)
- New business quote activity (SBG)
- Quoting profile/Underwriting (SBG)
- Renewal quote activity (SBG)
- SBG Renewals
- Book of Business (IFP and Group)
- IFP Activity History
- View Book of Business commission data (IFP and Group)



**Vicki Major,**  
**Health Net**

*We create solutions that work for your business.*

# Don't Wait.



Call your Health Net representative today for more information about our Broker Book of Business tool available at [www.healthnet.com](http://www.healthnet.com). It's one more way Health Net continues to make doing business with us even easier!



CA86123 (11/11)

In California, Health Net group and Individual & Family insurance plans and California Farm Bureau Member's Health Insurance Plans are underwritten by Health Net Life Insurance Company. Health Net group and Individual & Family Plans HMO and POS health plans are offered by Health Net of California, Inc.

In Oregon, Health Net group and Individual & Family plans are underwritten by Health Net Health Plan of Oregon, Inc.

Health Net of California, Inc., Health Net Life Insurance Company and Health Net Health Plan of Oregon, Inc. are subsidiaries of Health Net, Inc. Health Net is a registered service mark of Health Net Inc. All rights reserved.