

# Using Your Agent Portal

## View Submitted Applications

- Select SUBMITTED APPLICATIONS in the left navigation panel.
- For Med Supp, Short Term, Dental, and (Off Exchange) ACA select “Go”.
- ACA On Exchange submitted applications can be viewed in **Electronic Enrollment/HealthSherpa**.

## View Existing Business

- Select **EXISTING BUSINESS** in the left navigation panel.
- Select “Individual & Family” then select an application to view agent, address, phone, DOB, plans, effective date, and term date.
- Select “Download” on bottom left.

## Quoting and Renewals

Utilize this tab to submit applications for Med Supp, ACA/IFP, Short Term, and Dental.

## Download Client ID Cards

- Select **EXISTING BUSINESS** in the left navigation panel.
- Select “Individual & Family”
- Search for then select client’s name
- Select “ID Card” (left tab)
- Select “Print”
- Select “Download” (upper right)

## Other Resources

Within the **MEDICARE** and **AFFORDABLE CARE ACT** tabs, you can access marketing materials, plan brochures, applications, commission statements, and so much more!



## Check Ready to Sell Status

