USER GUIDE

MEDICA BROKER CLIENT VIEW

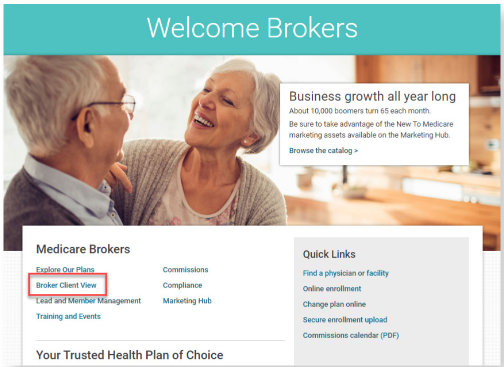
Broker Client View (BCV) is Medica's book of business dashboard. BCV features intuitive navigation in a secure environment with powerful data-driven functionality. This self-service tool offers opportunities for agents to support their Medica members and to grow and retain clients.

BCV displays Medicare and Individual & Family Business but does not currently include Medicare Supplement members enrolled after Oct. 1, 2019. Medicare enrollment receipts and enrollment issues can be accessed in the Broker Portal, under *Lead and Member Management*.

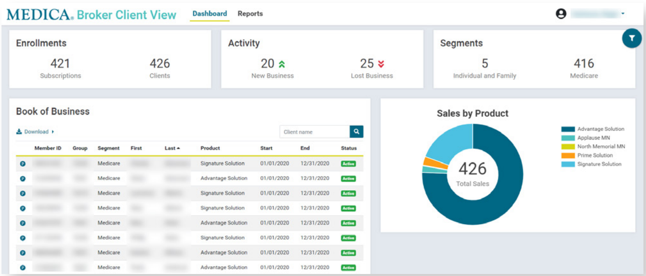
Accessing Broker Client View

STEP 1 Open a web browser and access the Medica Broker Portal by going to **medica.com/Brokers**.

STEP 2 Click on *Broker Client View*.



STEP 3 Your Broker Client View dashboard will display.



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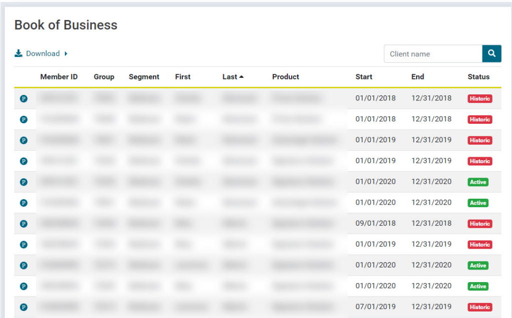
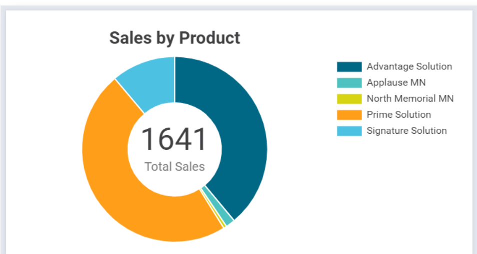
Dashboard Navigation

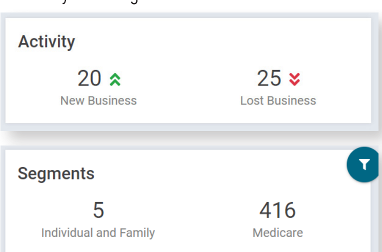
SECTION	DESCRIPTION	
Book of Business	**Download**	Export data to an Excel spreadsheet
	Member ID	Medica member ID number
	Group	Medica group number — only applies to Medicare plans
	Segment	Medicare Individual & Family Business
	First	Member's first name
	Last	Member's last name
	Product	Medica product name
	Start	Policy effective date
	End	Policy end date
	Status	Historic, Active or Future



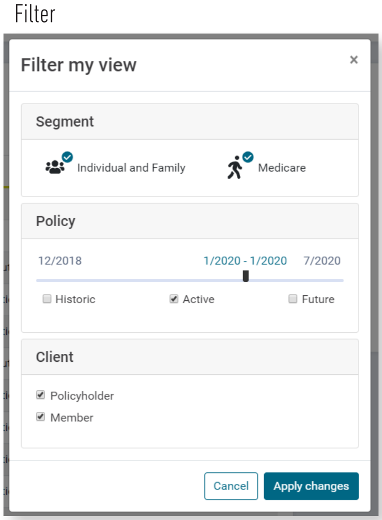
SECTION	DESCRIPTION
Sales by Product	Visual representation of sales by product based on total policy count (number of records in the book of business).

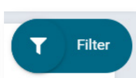


SECTION	DESCRIPTION	
Activity and Segments	**Activity**	**New Business:** Calculates increased subscriptions from last year to this year. **Lost Business:** Calculates the number of subscriptions present last year that no longer appear this year.
	Segments	Subscription counts by Individual & Family Business and Medicare segments.

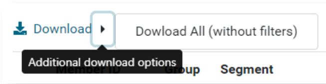


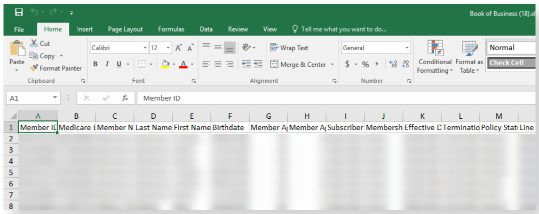
SECTION	DESCRIPTION	
Filter	**Segment**	Segment to display: » Individual & Family Business » Medicare
	Policy	Timeline to display: » Historic » Active » Future
	Client	Client type to display: » Policyholder » Member





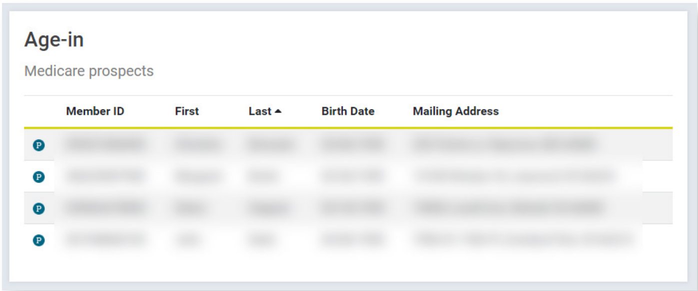
SECTION	DESCRIPTION
Download	Use the Download function to download full Medica book of business membership data to an Excel spreadsheet. Options include downloading data with filters applied and the ability to Download All (without filters). Additional member data fields appear in the downloaded book of business report.





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 64.5.
Age-Out: Individual & Family Prospects	Displays list of Individual & Family Business dependents who are approaching age 26.

Have questions or feedback about Broker Client View?

Contact your Sales Relationship Manager (SRM) or Broker Services at **1-866-752-0945** or **BrokerServices@medica.com**.

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For agent use only. Not intended for consumer use.

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