

NatGen Coverage Builder

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

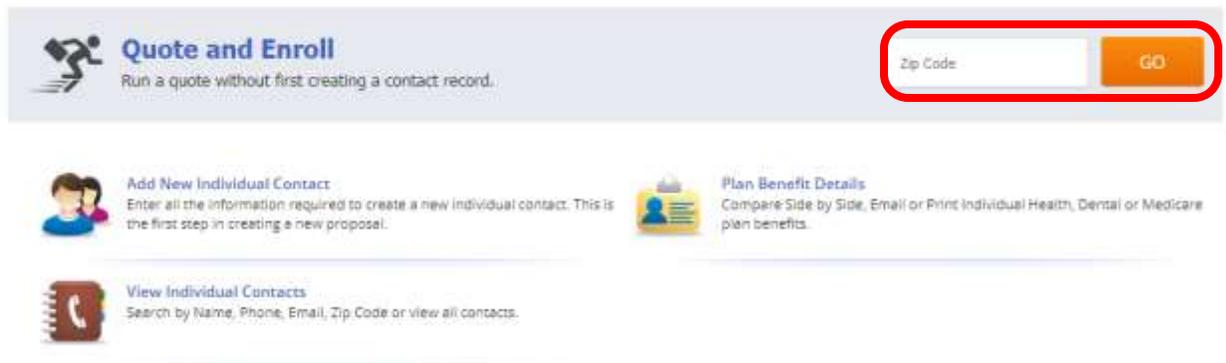
NatGen Coverage Builder

1. Log in using username and password you created.



The login form features the National General logo at the top. Below it are two input fields: 'Username' with a person icon and 'Password' with a lock icon. A blue 'Login' button is positioned below the password field. At the bottom, there are two links: 'Remember me' with a checkbox and 'Forgot Password?' with a question mark icon.

2. Enter in Client's zip code and press GO



The 'Quote and Enroll' section includes a red-bordered input field for 'Zip Code' and a red-bordered 'GO' button. Below this are three main options: 'Add New Individual Contact' (with a family icon), 'Plan Benefit Details' (with a person icon), and 'View Individual Contacts' (with a phone icon).

3. Enter in Gender, DOB and Tobacco Usage on each member on the policy.

- To add additional dependents press +add more dependents.

Select **Start coverage on, payment method and coverage for up to** for your client.

Quick Quote

Zip Code: 75201



The 'Census Information' section contains a table with columns for Relationship, Zip Code, County, Gender, DOB, and Tobacco Usage. The 'Zip Code' and 'Gender' columns are highlighted with red boxes. Below the table is a '+ Add More Dependents' link. At the bottom, a red-bordered box highlights the 'Start coverage on' (04/12/2018), 'Short-Term coverage up to' (Four 3-Month Terms), and 'Payment Method' (Monthly Payment) fields. A 'Back' button and a 'Show Plans' button are located at the bottom right.

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

NatGen Coverage Builder

4. You will see any pre made packages
 - a. You can enroll them into the package
 - b. Go and great your own, Create Proposal

Available Package(s) Add New Package

Compare packages available for your clients to enroll or customize a package to fit your customer's needs.

Texas Package View Details Custom

Carrier	Insurance Type	Plan Type	Product	Premium
National General	Short Term	PPD	Short Term Medical 5k, 80/20	\$130.38/mo
National General - Accident Medical Expense	Accident	AME	Plan Enhancer AME 7150 - SP	\$70.55/mo
National General - Cancer and Heart-Stroke	Cancer	IND	Cancer and Heart/Stroke \$30,000	\$49.99/mo
National General Dental PPO	Dental	PPD	Enhanced	\$48.02/mo

Premium Adjustment
\$4.10/mo

National General Dental Account:
\$6.59/mo

Amount Due Today
\$523.25

Starting Next Month
\$488.25

From Jul 11, 2018
\$497.85

From Oct 10, 2018
\$507.67

From Jan 09, 2019
\$517.93

From Apr 2019
\$172.87

Annual Total
\$6070.05

a → Enroll Now
← b

Create Proposal

5. **Products available** in zip code/client age **will populate**
 - a. Product tabs let you select product type you would like
 - 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

a → Dental (9) Short Term (12) Limited Medical (8) Accident (32) Critical Illness (5) Ancillary (5) Cancer (4)

b → Filters View By: Plan Type Add Plans To Cart Go Plans in Cart: 0

Company

NHC - National General (12)

Plan Type

PPO (12)

Deductible

No Deductible (0)

\$1 - \$2,500 (5)

\$2,501 - \$5,000 (0)

\$5,001 - \$10,000 (1)

\$10,001 or more (1)

Premium

Below \$50 (0)

\$51 - \$75 (0)

\$76 - \$150 (0)

\$151 - \$300 (3)

\$301 or more (8)

Applied Filters:

National General

Plan Name	Deductible	OOP Max	Office	Hospital	Rx	Premium	
PPD							
Short Term Medical 25k, 80/20	\$25,000	\$2,000	\$50	20%	No	\$189.15	ADD
Short Term Medical 5k, 90/50	\$5,000	\$4,750	\$0%	50%	No	\$260.81	ADD
Short Term Medical 10k, 80/20	\$10,000	\$2,000	\$50	20%	No	\$276.90	ADD
Short Term Medical 5k, 80/20	\$5,000	\$7,000	20%	20%	No	\$327.32	ADD
Short Term Medical 5k, 100/0	\$5,000	\$5,000	\$50	(0%)	No	\$398.16	ADD
Short Term Medical 2.5k, 50/50	\$2,500	\$1,000	\$0%	50%	No	\$440.22	ADD

c → ADD

d → Enroll Now Create Proposal

NatGen Coverage Builder

6. Cart has two options

- a. [Enroll Now](#) – Lets you enroll the client whatever products are in the cart
- b. [Create proposal](#) – Lets you make a pdf email option to send to customer. Customers can self-enroll this way.

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

in
or

NatGen Coverage Builder

7. ENROLL NOW

a. Enter Client's email

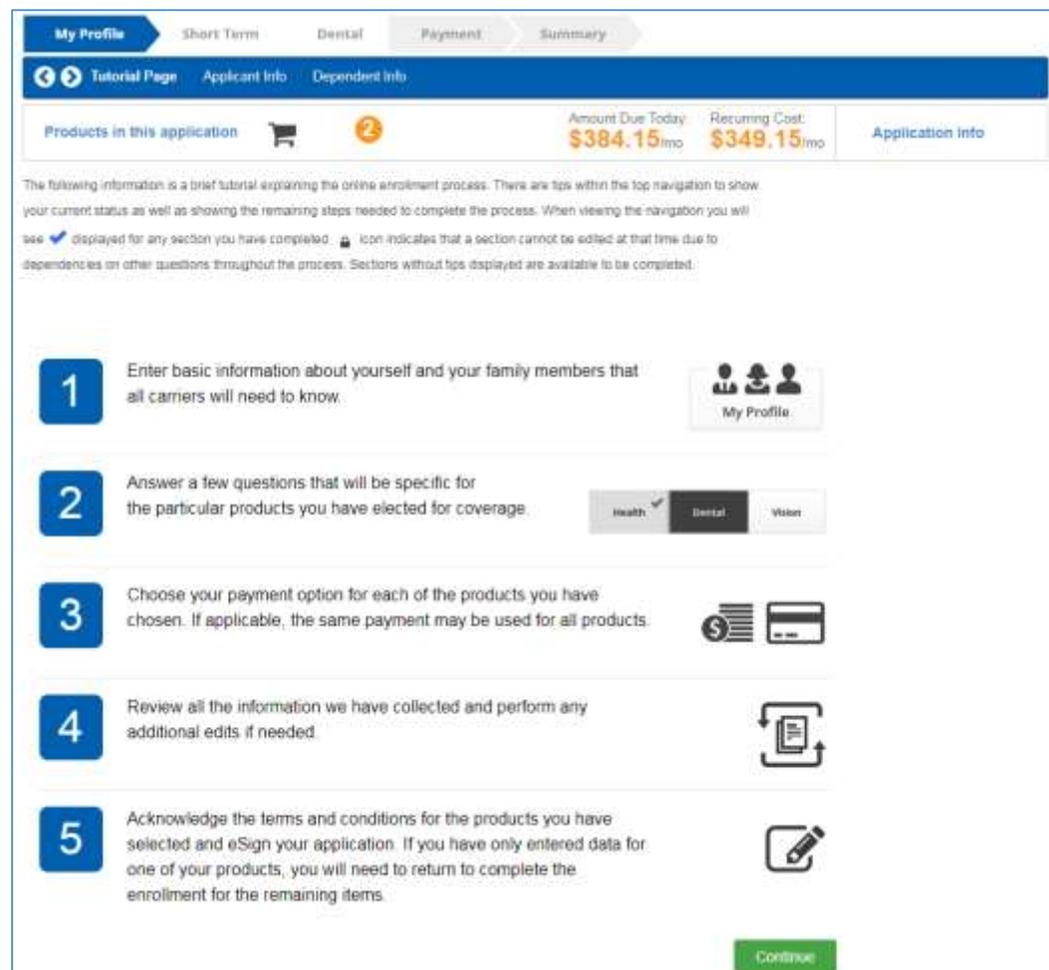


Please enter a family contact email.

Email:

b. Page will show with future steps. **Press Continue**

NOTE: Two tables will open, one is client contact information, other is the quote page below.



The screenshot displays the 'My Profile' section of the NatGen Coverage Builder application. The top navigation bar includes 'My Profile', 'Short Term', 'Dental', 'Payment', and 'Summary'. Below this, there are tabs for 'Tutorial Page', 'Applicant Info', and 'Dependent Info'. A summary bar shows 'Products in this application' with a shopping cart icon and a '2' notification, 'Amount Due Today: \$384.15/mo', 'Recurring Cost: \$349.15/mo', and 'Application Info'.

The main content area contains a tutorial explaining the online enrollment process. It lists five steps:

- 1** Enter basic information about yourself and your family members that all carriers will need to know. (Icon: My Profile)
- 2** Answer a few questions that will be specific for the particular products you have elected for coverage. (Icons: Health, Dental, Vision)
- 3** Choose your payment option for each of the products you have chosen. If applicable, the same payment may be used for all products. (Icons: Dollar sign, Credit card)
- 4** Review all the information we have collected and perform any additional edits if needed. (Icon: Document with arrows)
- 5** Acknowledge the terms and conditions for the products you have selected and eSign your application. If you have only entered data for one of your products, you will need to return to complete the enrollment for the remaining items. (Icon: Pencil and document)

A green 'Continue' button is located at the bottom right of the tutorial area.

NatGen Coverage Builder

- c. Fill in your client's information
 - i. First Name and Last Name
 - ii. Social Security Number & Martial Status
 - iii. Address
 - iv. Phone number
 - v. Mailing and Billing address yes/no circles
 - vi. US Citizenship
 - vii. Press Continue

Primary Applicant Info

Full Name

Date of Birth 01/01/1970

SSN

Gender Male

Marital Status

Home Address Info

Street Address Ste./Apt. #

City State Texas Zip Code 75201

County DALLAS

Home Phone Number

Cell Phone Number (optional)

Work Phone Number (optional)

Email Address

Is your mailing address the same as your home address? Yes No

Is your Billing address same to your home address? Yes No

What is your preferred Spoken Language? (Optional)

What is your preferred Written Language? (Optional)

Ethnicity

Are you a U.S. Citizen? Yes No

NatGen Coverage Builder

- d. Answer Product Underwriting Questions
 - i. Press Continue

The screenshot shows the 'Applicant Info' page in the NatGen Coverage Builder. The navigation bar at the top includes 'My Profile', 'Short Term', 'Dental', 'Payment', and 'Summary'. Below the navigation bar, there are tabs for 'Applicant Info', 'Additional Applicant Info', and 'Beneficiary Information'. A summary box displays 'Amount Due Today: \$384.15/mo' and 'Recurring Cost: \$349.15/mo'. A 'Need Help?' button with the phone number 310-325-2541 is visible. At the bottom, there are buttons for 'Download XML', 'View PDF', 'Previous', 'Save & Exit', and 'Continue'. The 'Continue' button is highlighted with a red box.

- e. Fill in Payment information for each product

The screenshot shows the 'Payment Information' form for 'Short Term Medical 5k, 80/20'. The form includes a note: "PLEASE NOTE THAT THE INITIAL COST INCLUDES A ONE TIME ENROLLMENT FEE OF \$36.00 THAT WILL BE ADDED TO THE COST SHOWN ABOVE". The 'Select Your Payment Method' dropdown is set to 'Credit Card'. The form fields are: 'First Name (Cardholder Name)', 'MI (Cardholder Name)', 'Last Name (Cardholder Name)', 'Credit Card Type' (Visa), 'Account Number' (EX 4123123412341234), 'Security Code/CVC from the back of your card', 'Exp. Date (MM/YY)', 'Billing Address', 'City', 'State', and 'Zip Code'. A 'Continue' button is highlighted with a red box.

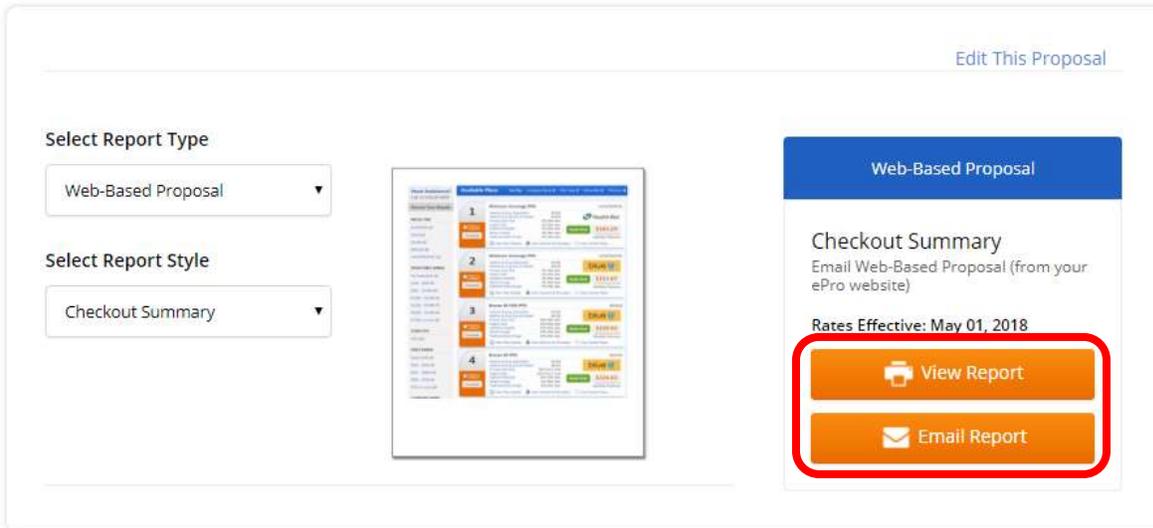
NatGen Coverage Builder

8. CREATE PROPOSAL

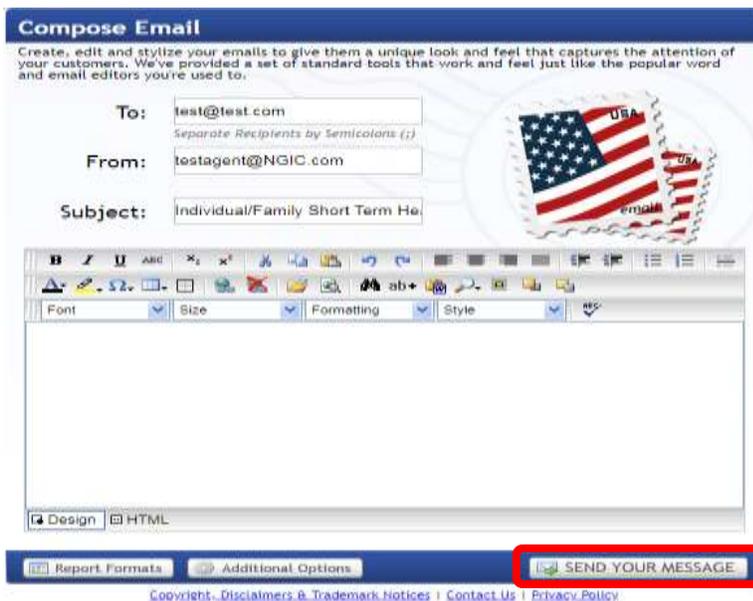
- a. If you chose Create Proposal Option instead of enroll



- b. Will present you two options
 - i. **View Report** used to **print**
 - ii. **Email Report** used for **clients to self-enroll**



- c. If you pressed Email report fill in:
 - i. To & From
 - ii. Subject
 - iii. Body
 - iv. Press Send Your Message



NatGen Coverage Builder

Customer Records Manager (CRM)

- A. Add a new customer from scratch
- B. Look up a previous customer 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.



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.

Add New Individual Contact

- 1. Need First Name, Last Name, Phone Email
- 2. Address
- 3. Those on the policy
- 4. Press Create Contact

1 Primary Contact Information

*First Name:	<input type="text"/>	Annual Household Income:	<input type="text"/>
Last Name:	<input type="text"/>	Household Size:	<input type="text" value="Choose"/>
Phone:	<input type="text" value="XXX-XXX-XXXX"/>	Tax Filing Status:	<input type="text" value="Choose Status"/>
Email:	<input type="text"/>		

2 Location

Street Address:	<input type="text"/>	*Zip Code:	<input type="text"/>
City:	<input type="text"/>	County:	<input type="text"/>

3 Census Information

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

[+ Add More Dependents](#)

NatGen Coverage Builder

View Individual Contacts

- A. Activity History – Sort by when you created the quote
- B. Search – search for contact by name
- C. Edit Column Data – Add or remove columns so edit what fields you see
- D. Contacts, click on First OR Last name to get into the contact's information

The screenshot displays the 'Contacts' page in the NatGen Coverage Builder. The interface includes a search bar at the top with the placeholder text 'perform a refined search within recent contacts' and a 'Search' button. Below the search bar, there are buttons for 'Advanced Search' and 'New Search'. The main content area shows a table of contacts with columns for Name, Phone, State, Insurance Type, Created Date, Birthdate, Policy, Status, and Action. The table is titled 'Contacts - Last 30 Days' and shows 25 results per page. The left sidebar contains navigation options: Proposals, Applications, Policies, Activity History (with sub-options: Today, Last 7 Days, Last 30 Days, NTD, YTD, All Activity, Custom Date), and No Saved Searches. Annotations A, B, C, and D are placed on the interface to highlight specific features: A points to the Activity History section, B points to the search bar, C points to the 'Edit Column Data' button, and D points to a contact's name in the table.

	Name	Phone	State	Insurance Type	Created Date	Birthdate	Policy	Status	Action
	Web 7	Water	MD		03/01/2018 08:23 AM	01/01/1970	Project	New	
	Web 7	888-444-1122	TX		03/01/2018 11:04 AM	01/01/1970	Project	New	
	Web 7		AZ		03/01/2018 06:34 AM	01/01/1985	Project	New	
	Web 7	807-847-9899	AL		03/02/2018 11:25 AM	12/12/1955	Project	New	
	Web 7	Water	AL		03/02/2018 11:01 AM	12/12/1955	Project	New	
	Web 7	Water	AL		03/02/2018 08:38 AM	12/12/1955	Project	New	
	Web 7	Water	TX		03/14/2018 01:43 PM	01/01/1970	Project	New	
	Web 7	Water	TX		03/14/2018 01:41 PM	01/01/1970	Project	New	
	Web 7	Water	AC		03/15/2018 01:57 PM	11/16/1984	Project	New	
	Web 7	Water	MD		03/15/2018 01:41 PM	01/01/1970	Project	New	
	Web 7	Water	IL		03/15/2018 01:39 PM	01/01/1970	Project	New	
	Web 7	Water	IL		03/15/2018 01:38 PM	01/01/1970	Project	New	

NatGen Coverage Builder

Inside a contact (once you press 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				
	48	1/1/1970	75201	M	No	<input checked="" type="checkbox"/>				

Health Dental Vision Life LTC A What proposals you have sent out to them Contact Notes

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

NatGen Coverage Builder

Questions, contact:

Call: (888) 870-6137

Email: CoverageBuilderSupport@NGIC.com