

MyEnroller Windows Quick Start Guide

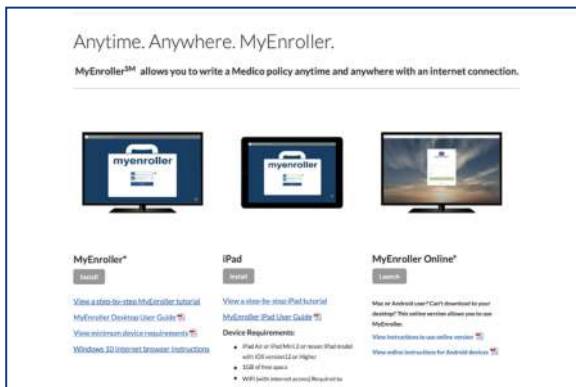


With MyEnrollerSM, our electronic quoting and application tool, you can perform a variety of duties:

- Generate a quote
- Take an application with an internet connection
- Use a signature option that works best for your applicant

1. Download and login

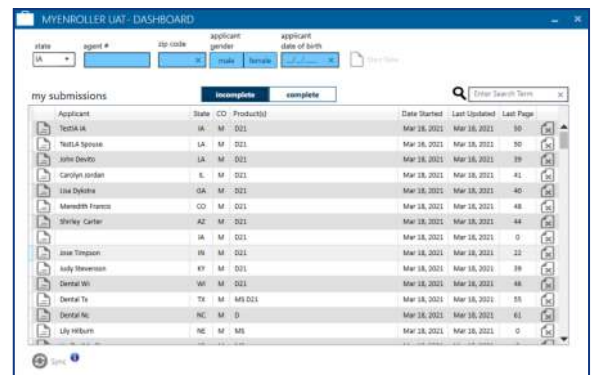
- a. Complete the registration process on mic.gomedico.com to create a username and password.
- b. After logging in, click the MyEnroller tab on the right side of the menu.
- c. Click the gray “Install” button in the first column.



- d. After you’ve downloaded the software, a MyEnroller briefcase icon will appear on your desktop. Click on the icon and enter your username and password.

2. Dashboard

- a. View details on Incomplete or Complete submissions.
- b. Begin the quote or enrollment process by adding key data.
- c. If a submission does not have a date listed in the “Date Uploaded” field on the Complete tab, the application has not been sent to the home office. Click “Sync” in the lower-left corner to upload the application to Medico. You must be connected to the internet to sync.



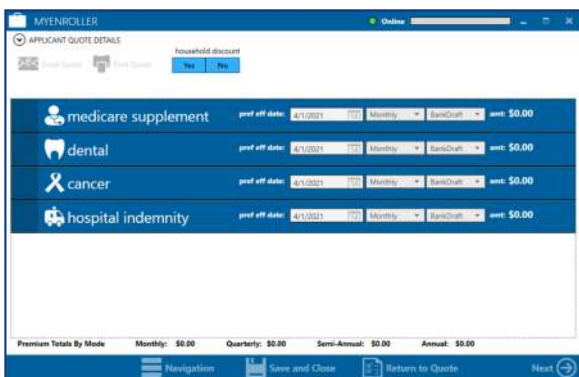
3. Navigating the site

- “Navigation” allows you to toggle between screens you’ve visited.
- “Save and close” lets you save the quote or application on the last page you completed and close the program.
- “Return to quote” allows you to return to the quote page to alter your quote or add an additional product to the quote.
- “Next” takes you to the next page and automatically saves the information you’ve entered.



4. Quote screen

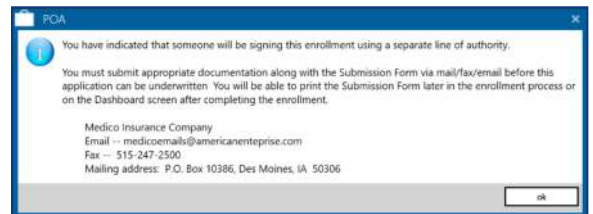
- Insert the insured’s information on the Dashboard, and you’ll be presented with the product quote screen. Only products available in the insured’s state and for their date of birth will be visible.
- Quote one product or multiple products at the same time and view individual premiums for each product on the blue product ribbon and total premiums at the bottom of the screen by mode. When you’re entering multiple product quotes, you can also enter different effective dates, premium modes, and payment methods.



- Medico offers household discounts on several products. Select “Yes” under the “Household discount” option, and the premium with the discount will appear on the product line.

5. Enrollment screens

- Required fields have a bright blue background.
- If any fields contain errors or missing information, they will appear with a red box around them. You will not be allowed to move to the next screen until the errors are fixed or missing fields are completed.
- Screens will contain information based on each state’s filed forms and previously answered questions. Questions or text may expand on screens based on responses.
- If there is a power of attorney (POA), guardianship, or conservatorship designation, tick the appropriate box on the general information page to indicate a separate line of authority. Submit the appropriate documentation separately.



- If the applicant lost other health insurance coverage and received a notice from the insurer, they may be guaranteed acceptance. Submit a copy of the notice separately after completing the application.

- f. Add all medications that the applicant has taken in the last 12 months. As the medication name is typed, the list of medications will narrow. Select the appropriate medication and dosage, then click the “Add Drug Info” button to save the details each time.

7. Additional functionality

a. Split commissions

- i. To split a commission with another agent, enter the agents' names, their Medico writing numbers, and the commission percentage split.

b. Email copy of application

- i. Forms can be sent to the applicant's email address for review and to save in their files. The copy will be a PDF that requires a password.

c. Synchronizing with home office

- i. When you click the “Complete case” button while connected to the internet, the application will sync with the home office and be sent directly to the underwriting department to be processed.

6. Signatures

a. Users have two signature options:

- i. Electronic, which may be used when the applicant is present or not present.
- ii. Voice authorization through a conference call to an 800 number.