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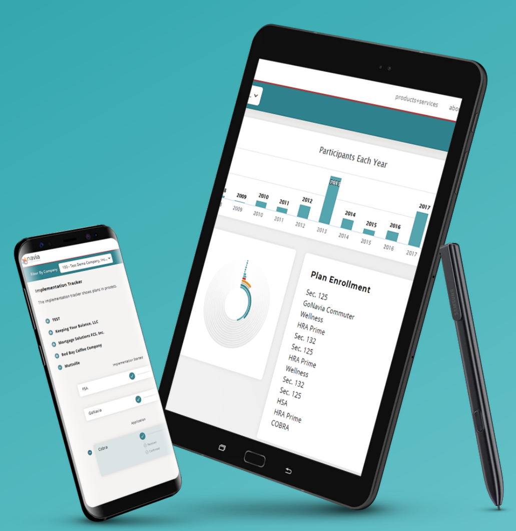
Broker Portal

User guide

- See real-time client data
- Track implementation progress
- Access forms & documents / send & receive files
- Receive notifications & alerts



Welcome to the Navia Broker Portal. Get metrics on your clients, track implementation progress, access forms and documents, and much more!

Full list of features

- View plan summaries by client
- Get real-time access to client metrics and important dates
- Track all current implementations going on at Navia
- View invoices billed to your brokerage
- Add new contacts and assign them to clients
- Send documents to Navia on our secure file share
- Receive documents from Navia on our secure file share
- Pull a limited number of client reports

How to use this document

This document will walk you through getting registered and started on the broker portal. It will also walk you through each key feature and illustrate how you can use the portal as a tool to enhance your Navia experience.

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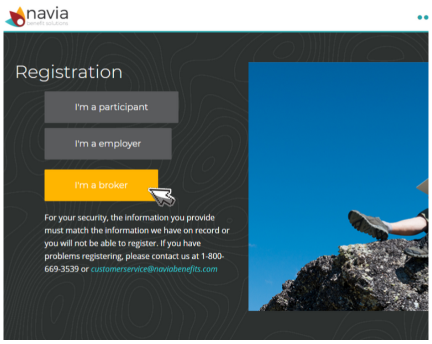
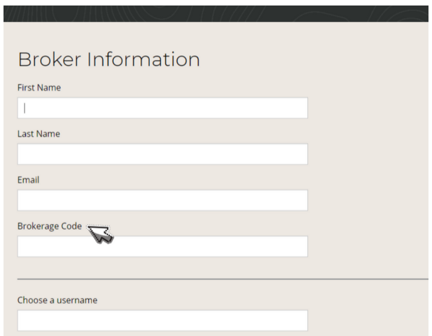
Getting started



STEP 1: Click on the registration link: https://app.naviabenefits.com/app/#/signup. Then click on "Broker" and enter the required information.

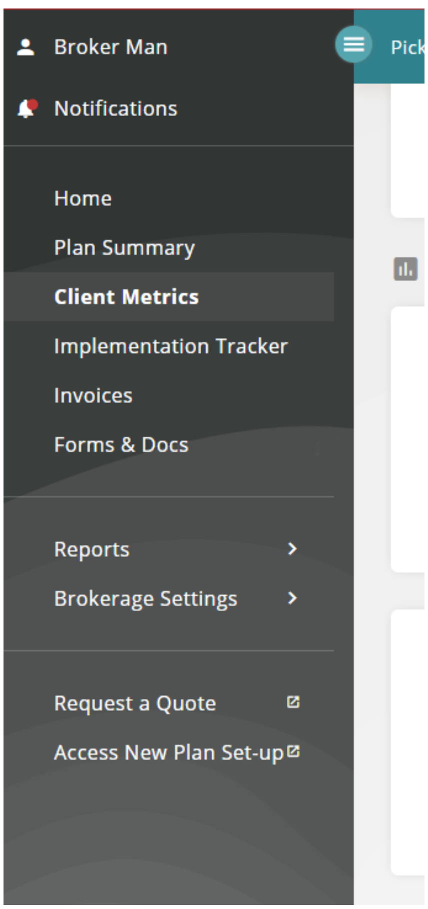


STEP 2: You will need to enter your four-character broker code in order to register. Then click "submit."

STEP 3: You will receive an email with a link you must click to complete your registration. After selecting the link, you will be asked to set a password. The password must be at least 8 characters long and contain at least three of the following types of characters: uppercase letter, lowercase letter, numeric, special character.

After you are registered, you can now access all of the great features within the portal. One important thing to note is that in order to access your clients, you do need to be listed as a contact within our system for each of your groups. If you do not see one of your groups within the portal after you register, please send an email to employerservices@naviabenefits.com, or give us a call at (425) 452-3488.

Navigation



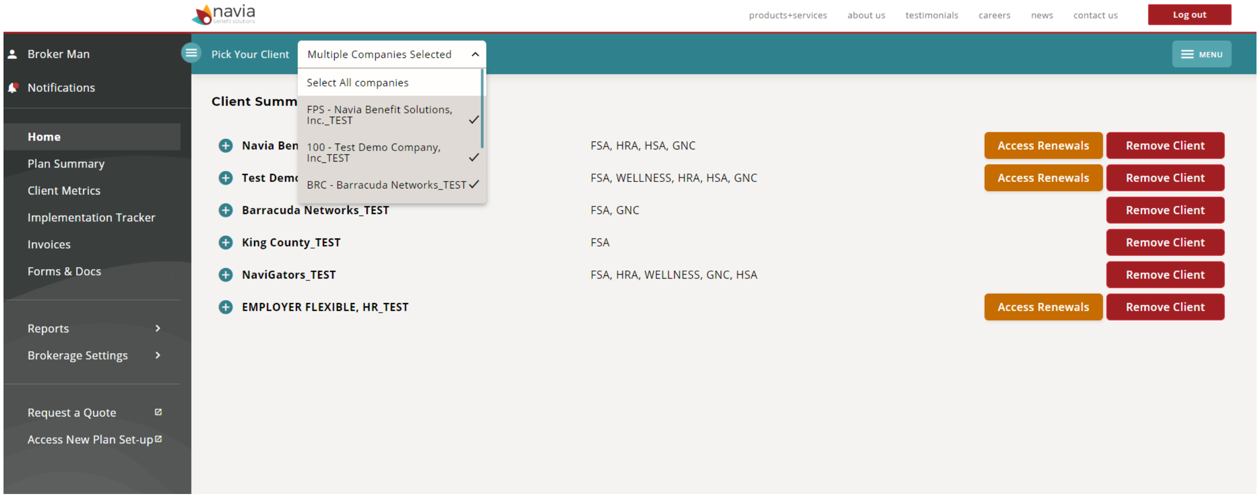
Tabs on the left-hand side are your key source of navigation through the portal. They list all the key functions and take you to various tools.

Tabs:

- Home
- Plan summary
- client metrics
- Implementation tracker
- Invoices
- Forms & docs
- Reports
- Brokerage settings
- Request a quote
- Access new plan setup

Home page

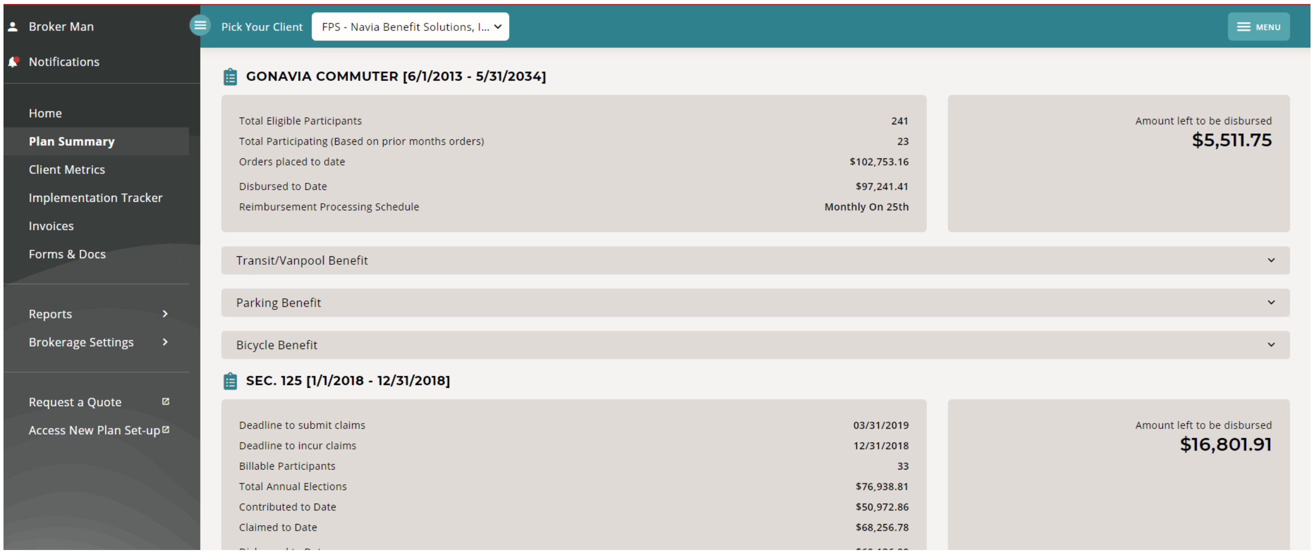
Pick Your Client: On this page, users can select multiple clients:



When you first login, you will be directed to Navia's home page. This is where you can access client renewals and manage your client list. If you click access renewals, you will be directed to the renewals page where you can manage all active plans, see submitted renewals, and even add new services for your clients.

If you expand each client, you will see additional details including mailing address, contact information for our team or account managers if one is assigned, and a snapshot of the renewal status for each active plan.

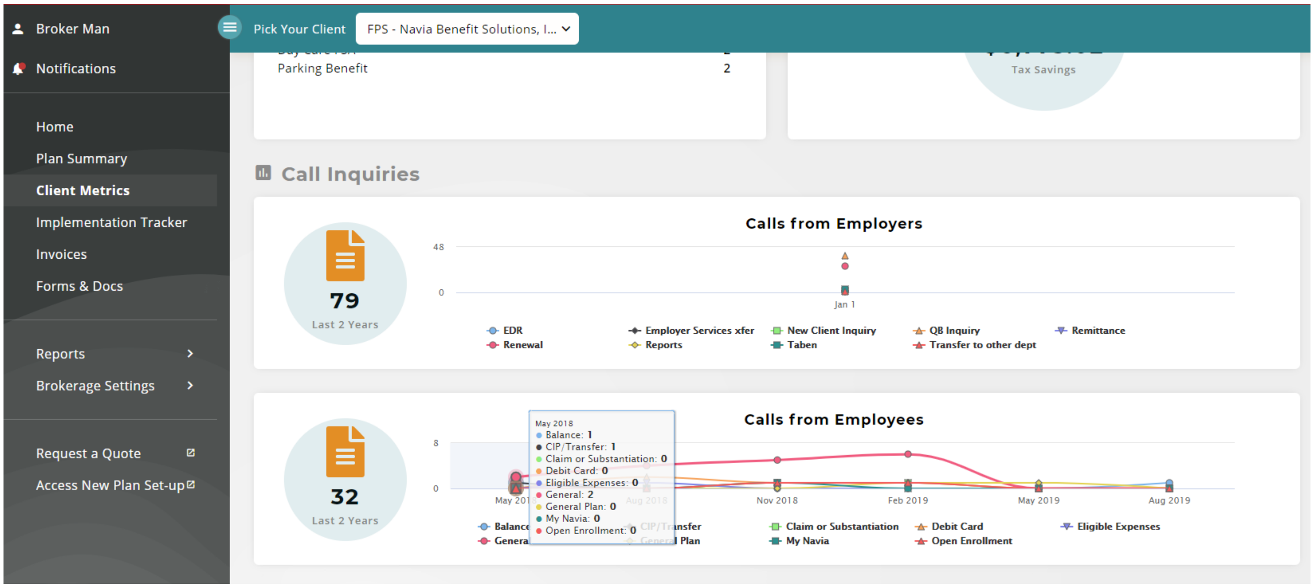
Plan summaries



When you click on the plan summary tab, you will have access to detailed plan metrics including data points like important plan deadlines, participant counts, contributions, disbursements, and plan utilization metrics.

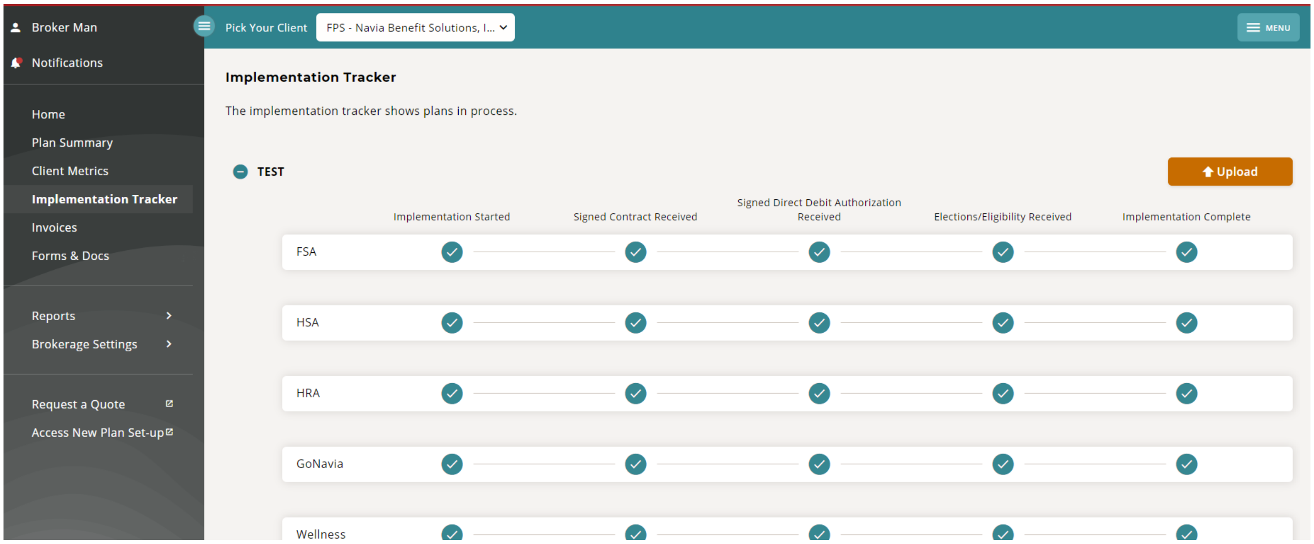
You can see this information for each active plan the client has with Navia.

Client metrics



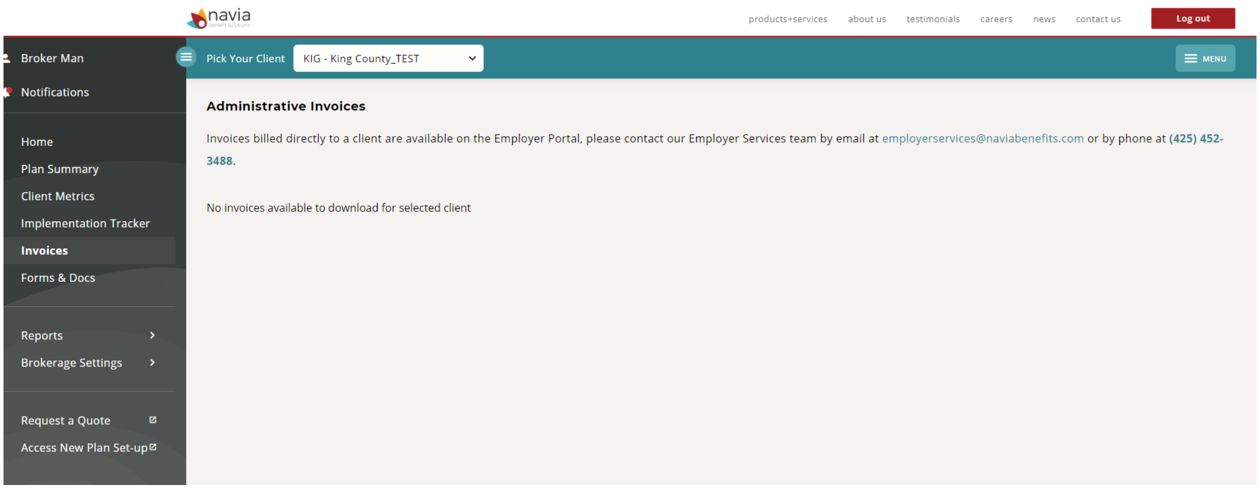
In the client metrics section, this page provides a snapshot of high level plan information, including important dates to remember, overall yearly participation trends, total plan enrollment numbers, number of claims submitted for each plan, total FICA tax saving, so you can see the true dollar value of each plan with Navia, and finally call metrics for both employer contacts and their participants.

Implementation tracker



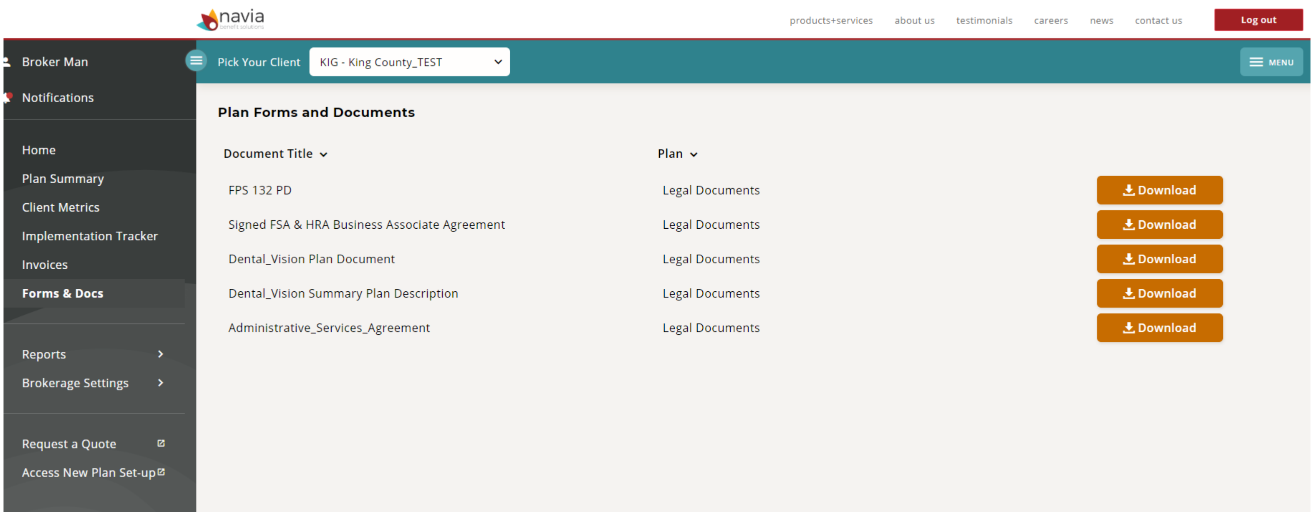
If you have any new plans that are added with Navia, we show you each plan's progress in the implementation tracker. This way you always have a pulse on the plan status. Here, we track each step from application submission to open enrollment completion. If you ever need to send us a document during the implementation phase, we make it easy using the drag and drop feature.

Invoices



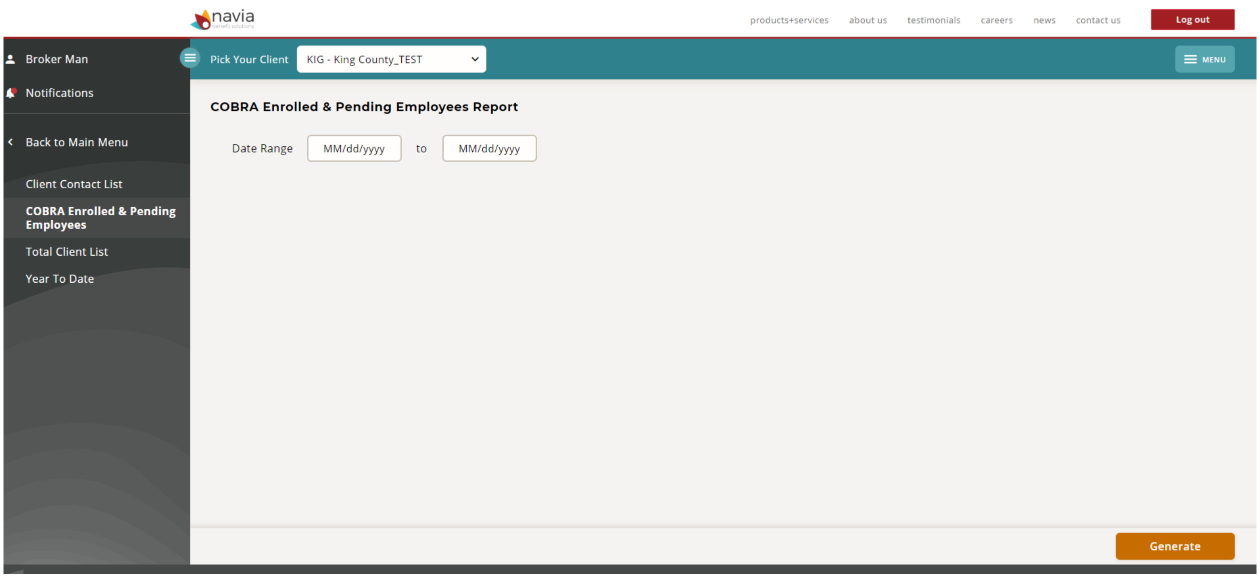
If you pay for any services on behalf of your clients, all invoices will be available through the portal as well. Please note that invoices will only be available if you as the broker are paying for administration. If your client is paying, you will not see any invoices in this section.

Forms & Docs



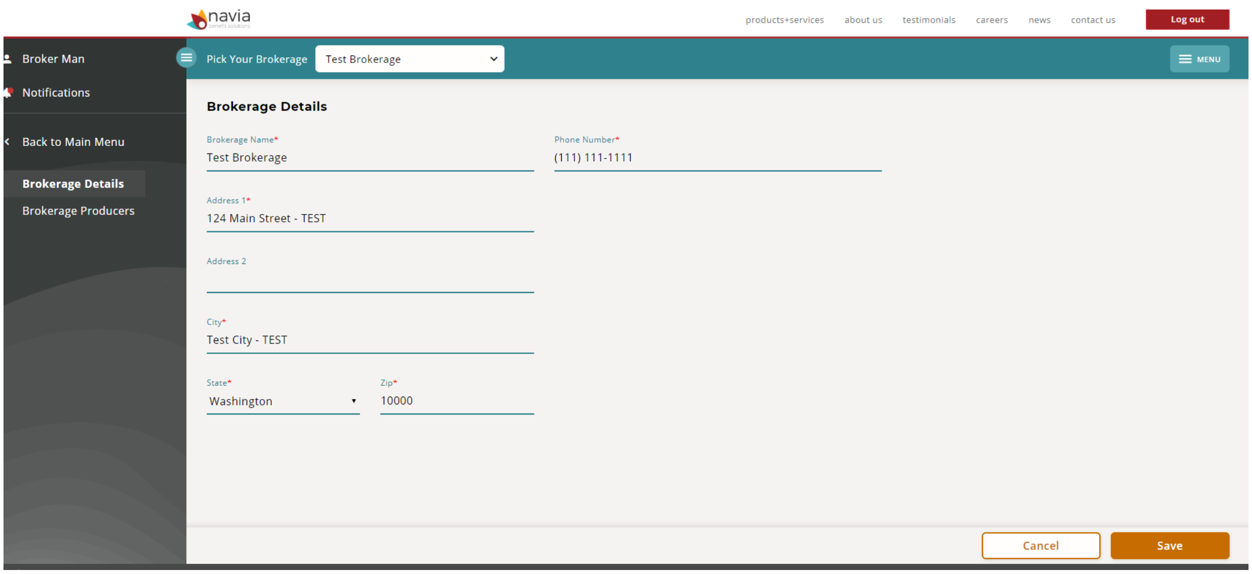
On the forms and docs tab, you will find all plan forms and documents listed for your clients. If you ever need to pull a plan document or summary plan description, it can be found within this section.

Reports



On the reports tab, you will see a number of different options available including, client contact list, COBRA enrollment, Total clients, and year-to-date reporting. Make sure to check out the YTD report as it gives a nice snapshot of each plan, utilization, and participation.

Broker settings



The Broker Settings tab is for you to manage your broker account settings. In this section, you can update company information on the details page, add new contacts, or remove individuals that no longer need access.

Questions?

If you have any questions about the Broker Portal, please send an email to employerservices@naviabenefits.com, or give us a call at (425) 452-3488.

Additional resources

Please check out our 10 minute webinar that walks you through all key functionality on the broker portal. Watch now: https://vimeo.com/390071697.