



Broker Portal

User guide



See real-time client data



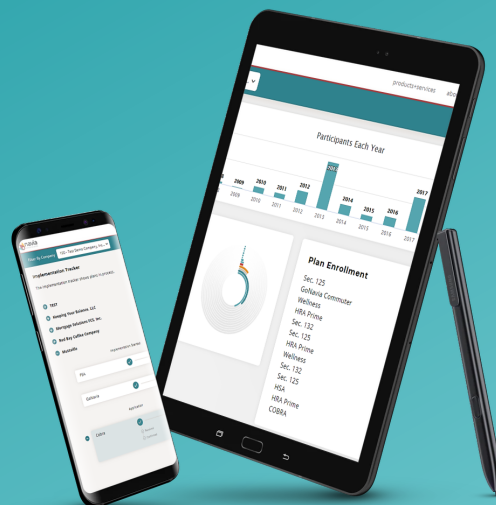
Track implementation progress



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!

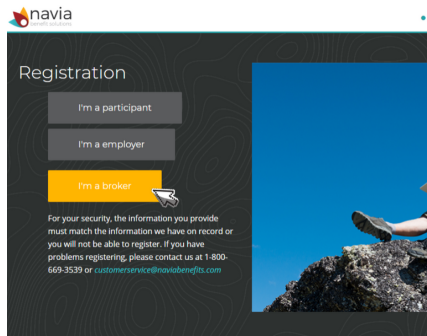
Full list of features

- 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

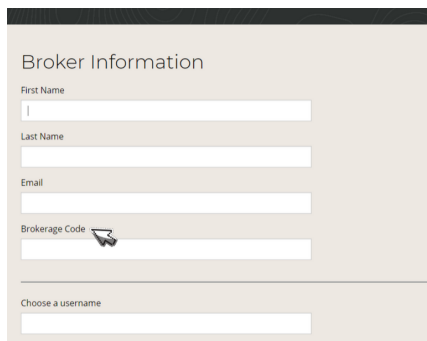
How to use this document

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.

Getting started



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

A screenshot of the "Broker Information" form. The form is light beige with a dark header. It contains several input fields: "First Name", "Last Name", "Email", "Brokerage Code", and "Choose a username". A mouse cursor is pointing at the "Brokerage Code" field.

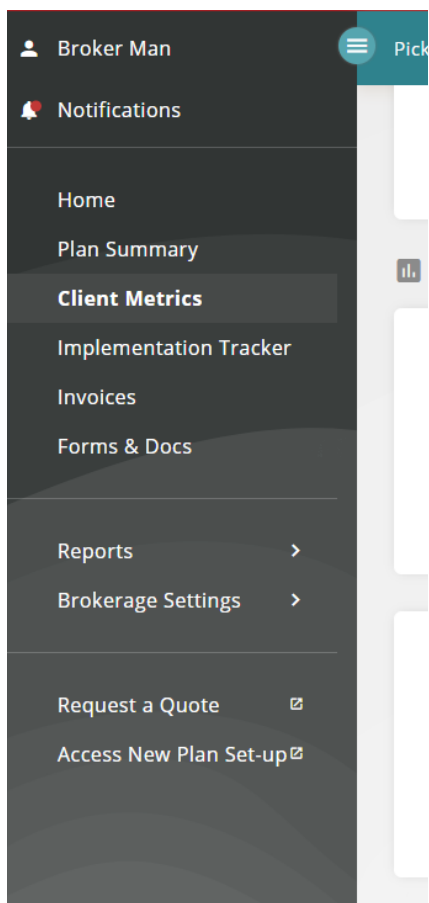
STEP 2: You will need to enter your four-character broker code in order to register. Then click "submit."



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



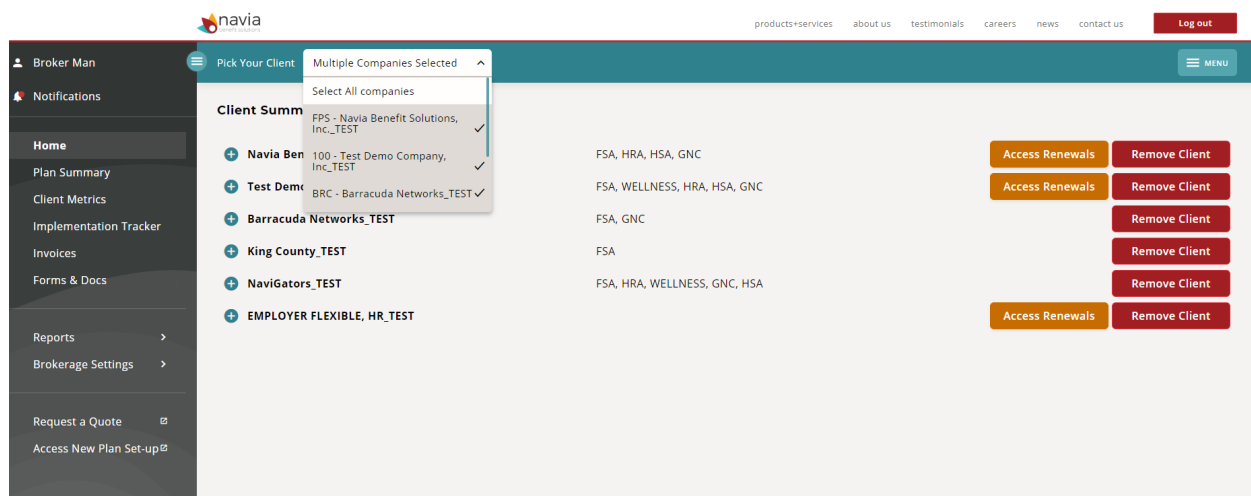
Tabs on the left-hand side are your key source of navigation through the portal. They list all the key functions and take you to various tools.

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

Broker Man

Notifications

Home

Plan Summary

Client Metrics

Implementation Tracker

Invoices

Forms & Docs

Reports

Brokerage Settings

Request a Quote

Access New Plan Set-up

Pick Your Client

FPS - Navia Benefit Solutions, L...

MENU

GONAVIA COMMUTER [6/1/2013 - 5/31/2034]

Total Eligible Participants	241
Total Participating (Based on prior months orders)	23
Orders placed to date	\$102,753.16
Disbursed to Date	\$97,241.41
Reimbursement Processing Schedule	Monthly On 25th

Amount left to be disbursed

\$5,511.75

Transit/Vanpool Benefit

Parking Benefit

Bicycle Benefit

SEC. 125 [1/1/2018 - 12/31/2018]

Deadline to submit claims	03/31/2019
Deadline to incur claims	12/31/2018
Billable Participants	33
Total Annual Elections	\$76,938.81
Contributed to Date	\$50,972.86
Claimed to Date	\$68,256.78

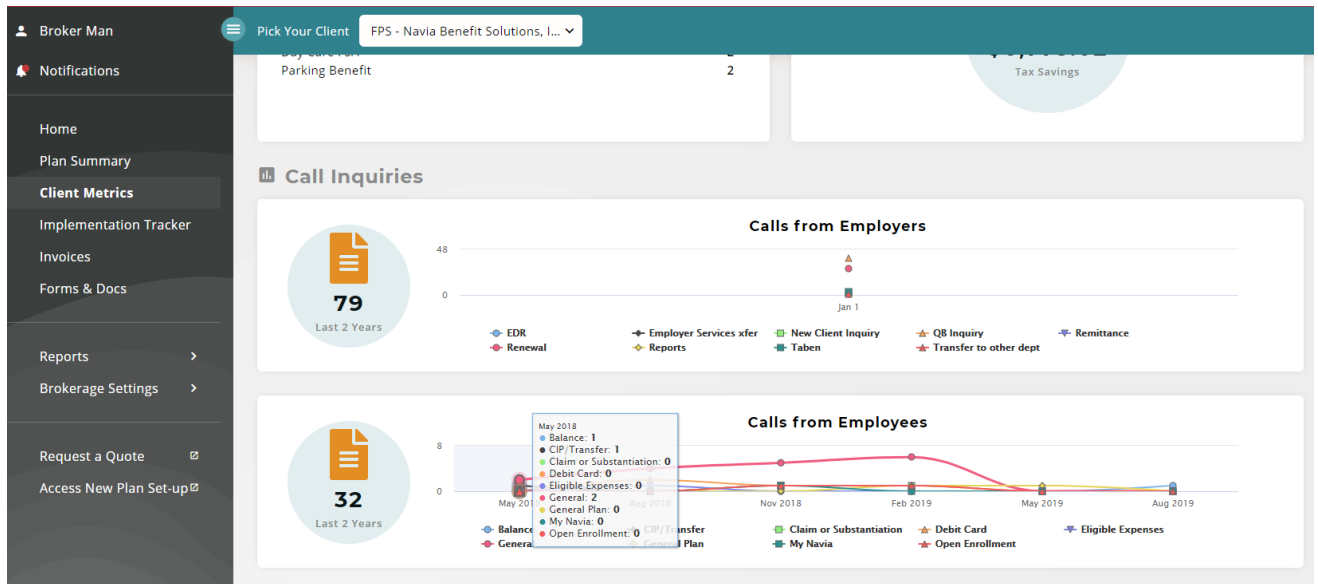
Amount left to be disbursed

\$16,801.91

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.

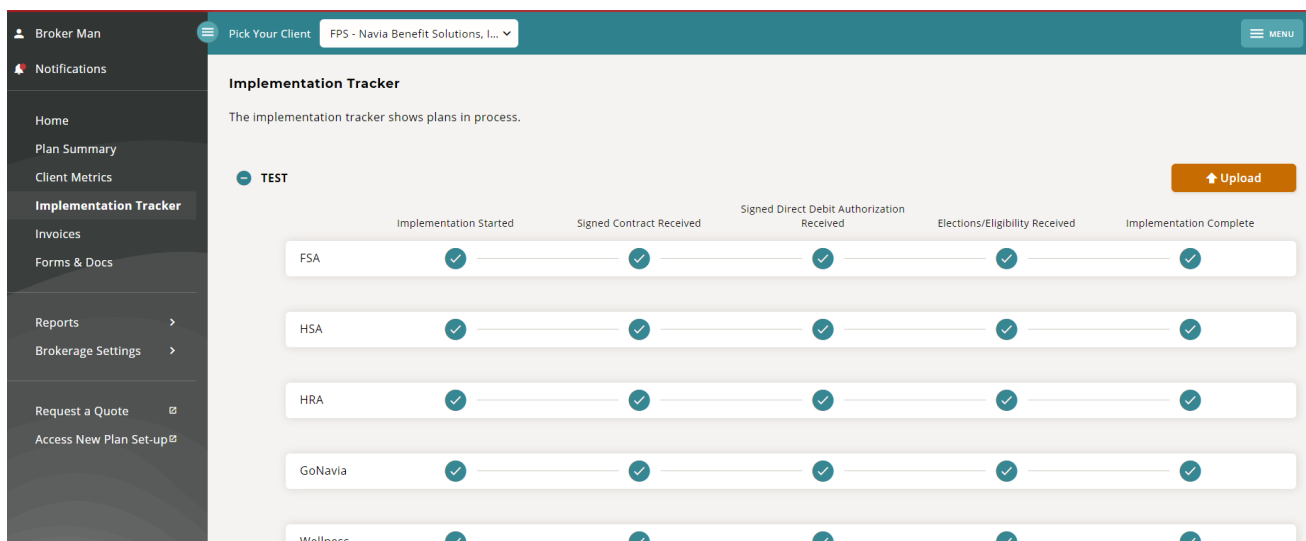
You can see this information for each active plan the client has with Navia.

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.

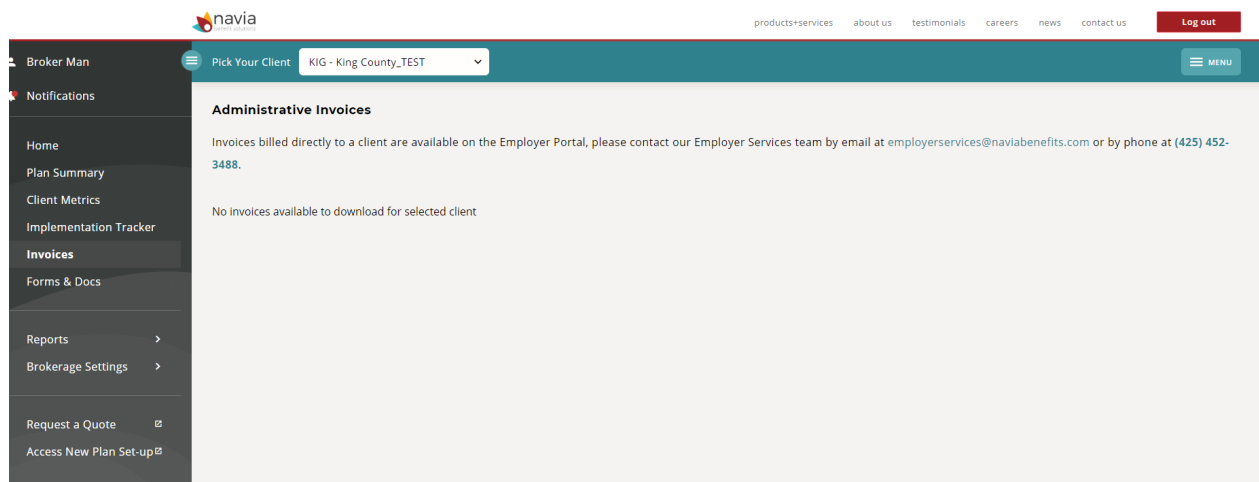
Implementation tracker



	Implementation Started	Signed Contract Received	Signed Direct Debit Authorization Received	Elections/Eligibility Received	Implementation Complete
FSA	✓	✓	✓	✓	✓
HSA	✓	✓	✓	✓	✓
HRA	✓	✓	✓	✓	✓
GoNavia	✓	✓	✓	✓	✓
Wellness	✓	✓	✓	✓	✓

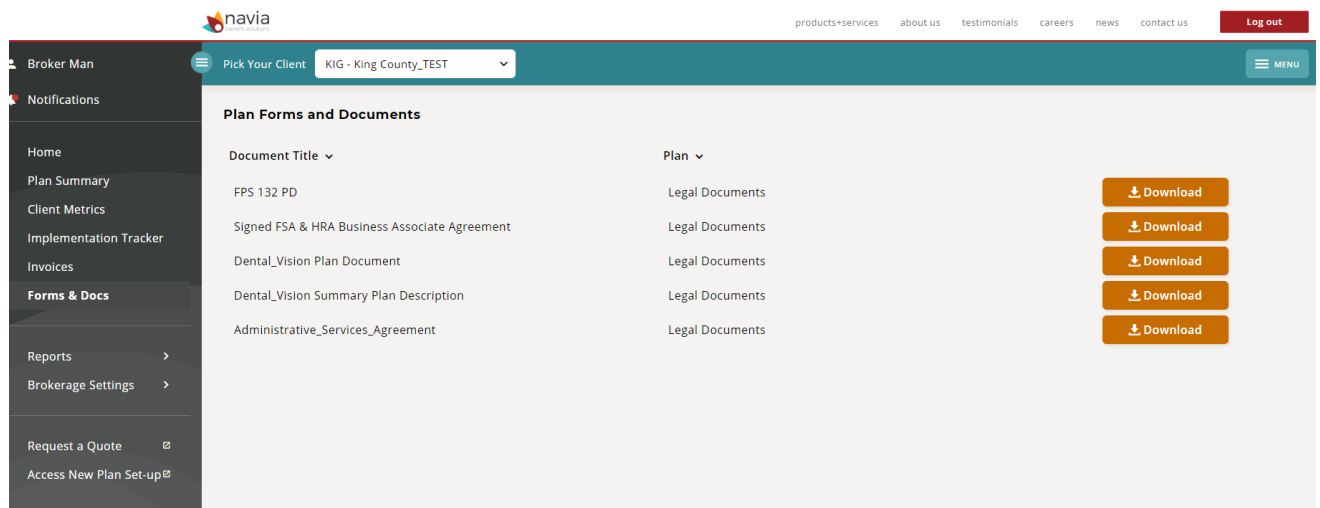
If you have any new plans that are added with Navia, we show you each plan's progress in the implementation tracker. This way you always have a pulse on the plan status. Here, we track each step from application submission to open enrollment completion. If you ever need to send us a document during the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

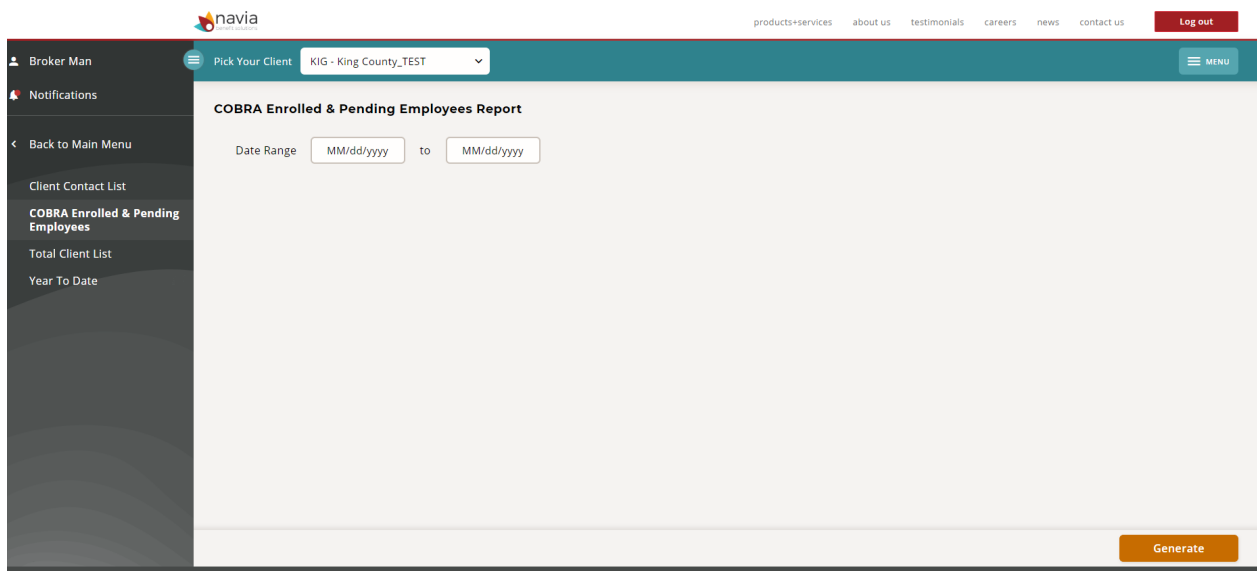


The screenshot shows the Navia web application interface. At the top, there is a navigation bar with the Navia logo, a client selection dropdown (currently showing 'KIG - King County_TEST'), and a 'Log out' button. A sidebar on the left contains various navigation options: Broker Man, Notifications, Home, Plan Summary, Client Metrics, Implementation Tracker, Invoices, Forms & Docs (highlighted), Reports, Brokerage Settings, Request a Quote, and Access New Plan Set-up. The main content area is titled 'Plan Forms and Documents' and displays a table of documents for the selected client. The table has two columns: 'Document Title' and 'Plan'. Each row lists a document title, its category (all are 'Legal Documents'), and a 'Download' button.

Document Title	Plan	Action
FPS 132 PD	Legal Documents	Download
Signed FSA & HRA Business Associate Agreement	Legal Documents	Download
Dental_Vision Plan Document	Legal Documents	Download
Dental_Vision Summary Plan Description	Legal Documents	Download
Administrative_Services_Agreement	Legal Documents	Download

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.

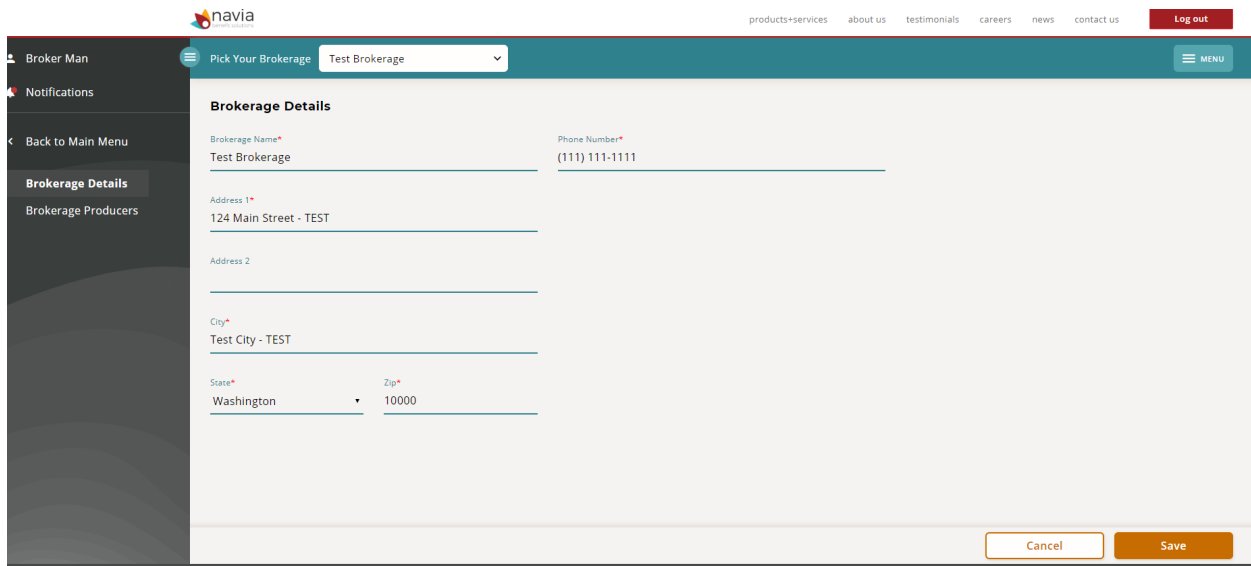
Reports



The screenshot shows the navia web application interface. At the top, there is a navigation bar with the navia logo, a "Log out" button, and links for "products+services", "about us", "testimonials", "careers", "news", and "contact us". Below this is a header area with a "Pick Your Client" dropdown menu set to "KIG - King County_TEST" and a "MENU" button. The left sidebar contains a list of navigation options: "Broker Man", "Notifications", "Back to Main Menu", "Client Contact List", "COBRA Enrolled & Pending Employees" (which is highlighted), "Total Client List", and "Year To Date". The main content area is titled "COBRA Enrolled & Pending Employees Report" and features a "Date Range" section with two input fields labeled "MM/dd/yyyy" separated by a "to" label. At the bottom right of the main area is a "Generate" button.

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 screenshot shows the Navia Broker Settings page. The top navigation bar includes links for products+services, about us, testimonials, careers, news, contact us, and a Log out button. The left sidebar contains a menu with options: Broker Man, Notifications, Back to Main Menu, Brokerage Details (highlighted), and Brokerage Producers. The main content area is titled 'Brokerage Details' and features a dropdown menu for 'Pick Your Brokerage' set to 'Test Brokerage'. The form contains the following fields:

Field	Value
Brokerage Name*	Test Brokerage
Phone Number*	(111) 111-1111
Address 1*	124 Main Street - TEST
Address 2	
City*	Test City - TEST
State*	Washington
Zip*	10000

At the bottom right of the form are 'Cancel' and 'Save' buttons.

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>.

Connect with us today

Sales@naviabenefits.com

(425) 452-3498

www.naviabenefits.com

No matter your benefit strategy,
Navia can help!

navia health



Health FSA
COBRA
MEC
HRA
HSA
Direct billing
Telemedicine

navia life



Daycare FSA
Fitness
GoNavia
Adoption

navia compliance



5500
NDT
DOL IRS
POP
ACE reporting
ERISA