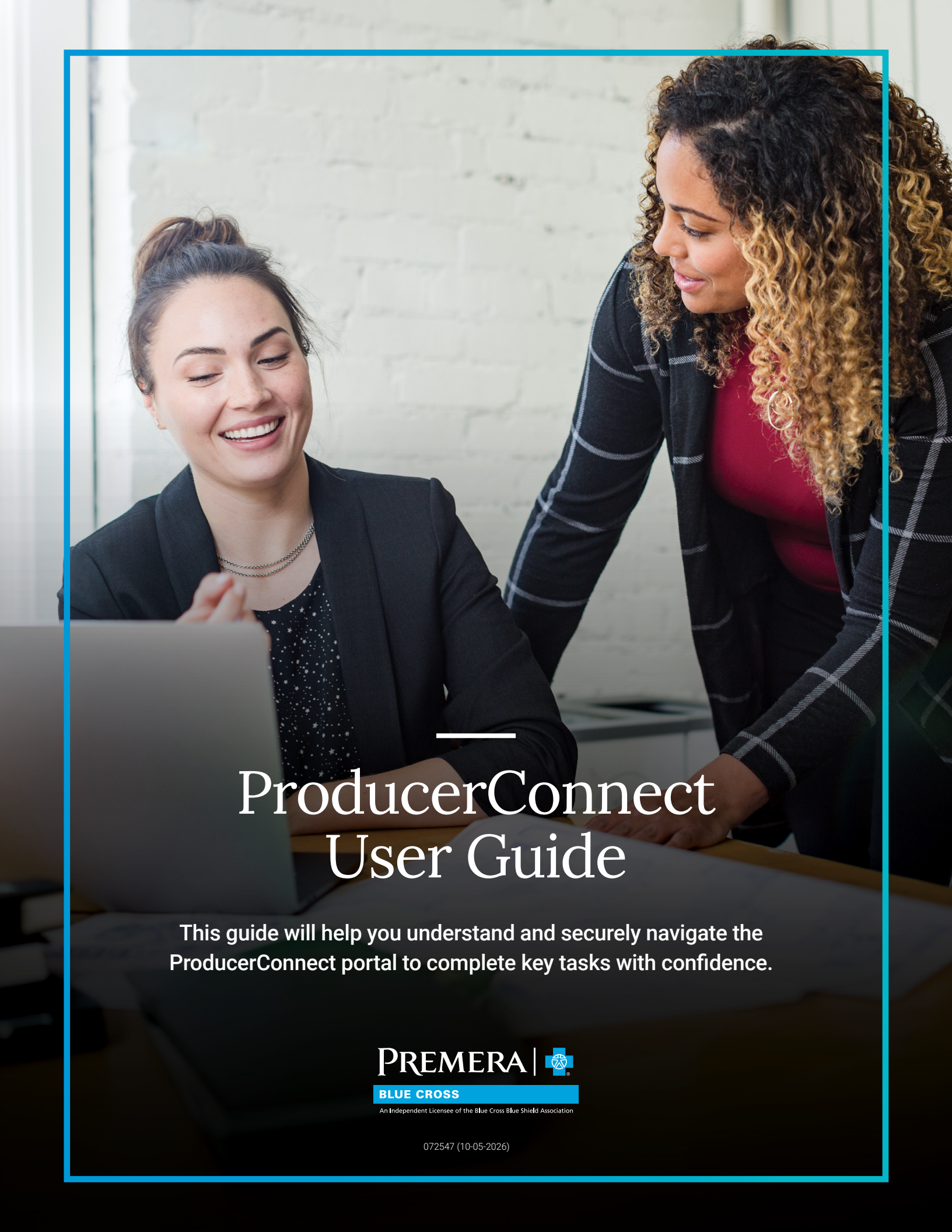




— ProducerConnect User Guide

This guide will help you understand and securely navigate the ProducerConnect portal to complete key tasks with confidence.

PREMERA | 

BLUE CROSS

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072547 (10-05-2026)

Quick Reference: Find What You Need

Gain fast access to guide sections that are most relevant to you.

If you need to	Go to this section
Know what ProducerConnect supports and how to begin using it	Start Here: Welcome to ProducerConnect
Understand user roles and permissions	User Roles and Permissions
Sign in, recover your user ID, or reset your password	Logging In to ProducerConnect
Learn what authorized portal areas offer and how to navigate their screens	ProducerConnect Screens and Capabilities
Troubleshoot common issues	Troubleshooting
Review security best practices	Security Guidelines

Start Here: Welcome to ProducerConnect

ProducerConnect is a secure online portal that gives producers and agency users one place to access business information, manage common account tasks, and find helpful resources. Use this guide to learn how to get into the portal and how to use the screens for each of its authorized areas to complete key actions for different roles. Sections for internal or administrative roles are identified where applicable.

Supported Lines of Business

ProducerConnect supports major Premera and LifeWise lines of business, helping users access the information and tools they need across the following plans:

Premera Blue Cross

- Individual and family plans
- Large group
- Medicare Supplement

Premera Blue Cross Blue Shield of Alaska

- Individual and family plans
- Large group
- Medicare Supplement

Premera Blue Cross HMO

- Large group

LifeWise Health Plan of Washington

- Individual and family plans

LifeWise Health Plan of Washington Clark County

- Group

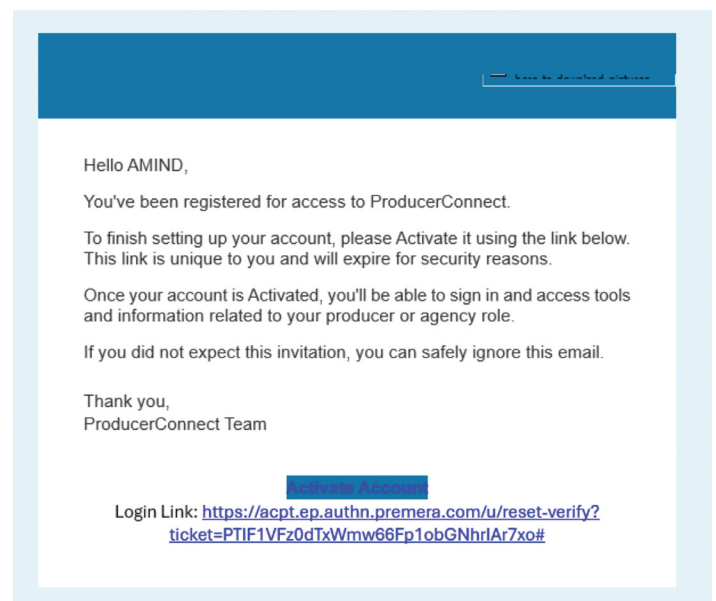
Prerequisites

Learn what you'll need before beginning to use ProducerConnect.

- ✓ **An active ProducerConnect account or registration invitation.**
 - Producer Admin will create a producer/agency in EDGE (the legacy CRM system for this data), which will sync to the ProducerConnect portal and will trigger an invitation email.
 - When you receive the invitation email, follow prompts to complete registration via Auth0 (an authorization platform for secure access).
- ✓ **An assigned user role with appropriate access.**
- ✓ **A supported web browser and reliable internet connection.**
- ✓ **Access to your registered email for registration, password reset, or account recovery steps.**

Registration Process

1. New user information is entered based on the assigned role:
 - **Sales, Agency Admin, or Producer:** The new user is entered in EDGE, which sends the user's data to Auth0.
 - **Agency Account Manager:** The new user is entered in ProducerConnect, which sends the user's data to Auth0.
2. Auth0 sends a registration invitation when an account is created for any role. The email will include your user name (which is your email address), a one-time authentication code, and a registration link that's **valid for seven days**.
3. Open the registration invitation sent to your registered email address and select the registration link.
4. Follow the prompts to verify your identity and create your ProducerConnect credentials.
5. Complete any required multi-factor authentication setup or verification.
6. After registration is complete, sign in to ProducerConnect using your new credentials.



User Roles and Permissions

Compare and understand what each ProducerConnect role can access or support within the portal.

ProducerConnect role	What each role is permitted to do
Producer	Access the portal, view Dashboard information, review assigned Book of Business details, open account or member information, use available external links, manage profile settings, and access resources and support.
Agency Account Manager	Support assigned producers or agencies by reviewing Dashboard information, viewing Book of Business details, opening account or member information, managing profile settings, and accessing resources and support.
Agency Admin	View agency-level business information, access Book of Business details, manage agency users when available, add or update agency account managers, resend registration emails, manage profile settings, and access resources and support.
Sales	View users and business information across assigned agencies or producers, support producer and agency access, manage agency account manager details where allowed, resend registration emails, and access portal resources.
Producer Admin	Manage producer and agency records, view users and business information across agencies, enable or disable user access where allowed, resend registration emails, manage agency account manager details, and support portal administration.

Signing in to ProducerConnect

Start here: Choose the appropriate login path, then follow the role-specific guidance if you need help with your User ID or password.

First-time login. If this is your first time using ProducerConnect, start with the invitation email you received. Follow the link in the email to complete registration, create your credentials, sign in to the portal, and create a passkey if you choose to.

The first screenshot, titled "Welcome to Premera", shows the login page with an email address field containing "xxx@xxx.com". A red arrow points from this field to the second screenshot. The second screenshot, titled "Enter Your Password", shows the password field with "xxx@xxx.com" and a "Forgot password" link. The third screenshot, titled "Create a passkey for Premera on this device", shows options to create a passkey or continue without one.

Forgot User ID. If you cannot remember your User ID, select the forgot User ID option from the login screen and follow the instructions provided. Your User ID is your registered email address.

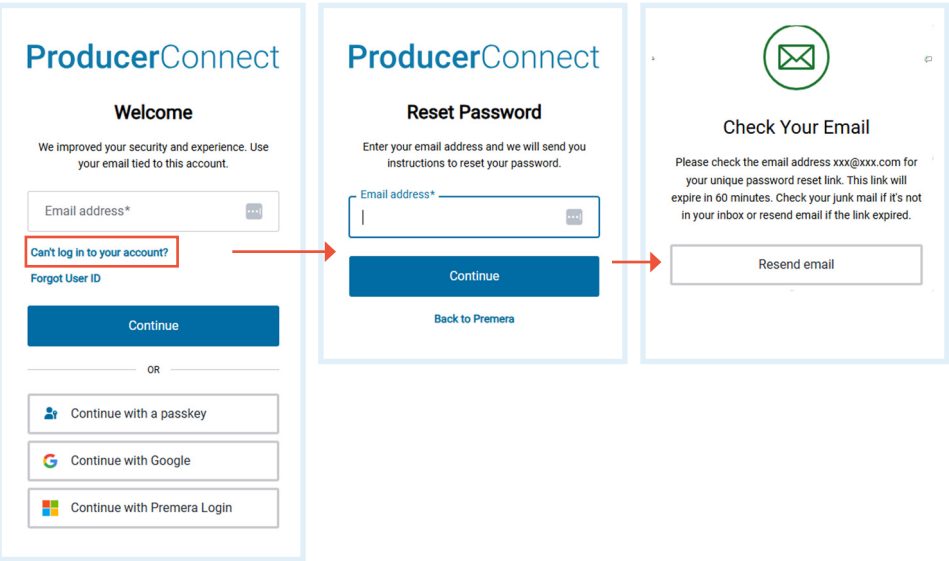
The first screenshot, titled "Welcome", shows the login page with a "Forgot User ID" link highlighted by a red box. A red arrow points from this link to the second screenshot. The second screenshot, titled "Sign in support", shows a "Please select your role using ProducerConnect" screen with three options: "Producer", "Agency Admin", and "Agency Account Manager".



Need help? Role-Specific Guidance

- **Agency Admin:** Direct users to Producer Admin for User ID assistance. Confirm with Producer Admin if you need your own User ID retrieved.
- **Agency Account Manager:** Contact Producer Admin if you forget your User ID, then follow the on-screen instructions for next steps.
- **Producer:** Call Producer Admin if you forget your User ID, then follow the on-screen instructions and check your registration email for your User ID.

Reset Password. If your password needs to be reset or corrected, follow the guidance on the login screen or contact the appropriate support resource listed in this guide for help updating your access information.



Need help?
Role-Specific Guidance

- **Agency Admins, Agency Account Managers, and Producers** can use this screen to reset their own ProducerConnect password.
- **Producer Admin and Sales** users generally use internal Premera identity or support processes instead of this screen.

ProducerConnect Sections and Capabilities

Next: Before learning how to navigate the screens in the portal, here's an overview of what they offer.

Section	How it serves you
Dashboard/Landing page	Provides a personalized hub for your key metrics, alerts, quick links, and portal navigation.
User Profile	Allows you to view profile and account settings, review agency information where available, change your password, and log out securely.
Book of Business	Permits access to assigned account, policy, group, member, and line-of-business information, including tools to search, filter, sort, export, print, and open detail views.
Manage Account	Enables authorized admin and sales roles to view users, manage producer and agency account manager records, add or update agency account managers, activate or deactivate access where allowed, and resend registration emails.
Resources & Support	Provides access to product guides, training materials, support content, and other helpful resources.
External Links/ Single Sign-On	Offers access to authorized external tools and systems, such as Insights Reporter and shopping pages, when available for your role and line of business.

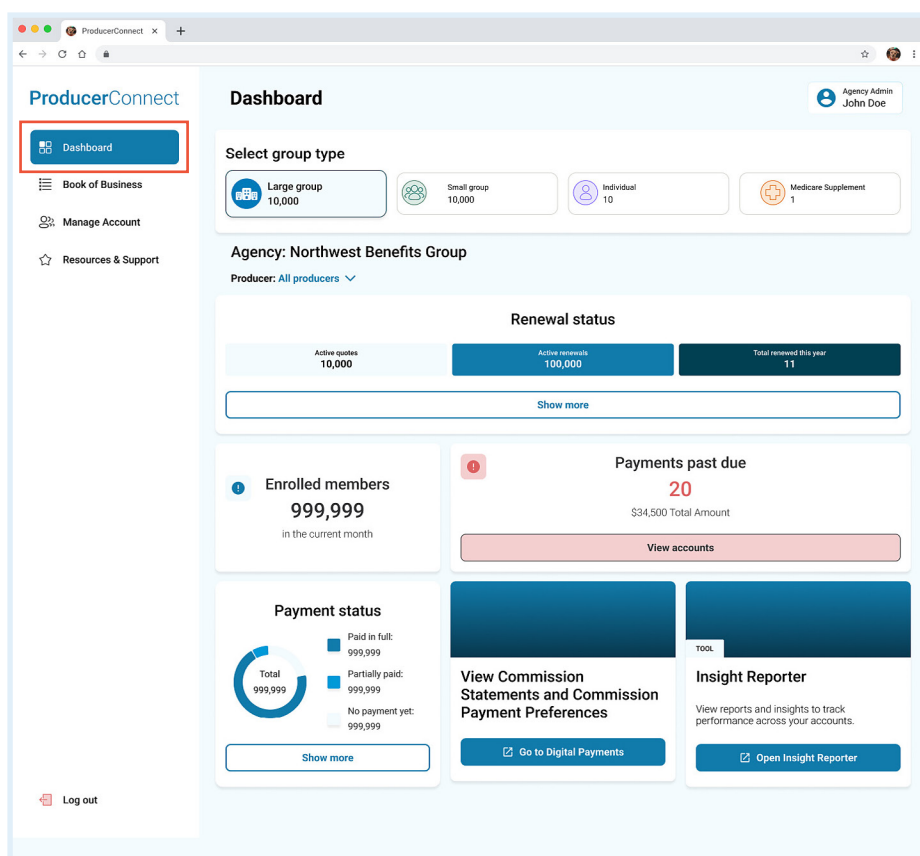
Dashboard/Landing Page Navigation

What you can do here: Get a quick handle on key metrics, alerts, important updates, and common tasks before having a client or agency conversation.

Role visibility note: The Dashboard is available to all ProducerConnect roles.

The tiles, alerts, and links you see may vary based on your role, agency, and line of business.

1. After signing in, you arrive on the Dashboard/Landing Page.
2. Use the main menu, dashboard tiles, alerts, and quick links to navigate to the various portal screens available based on your role.
3. Select a metric, alert, or quick link to open the related page, and then use the home or dashboard option to return to your landing page at any time.



Quick Tips for Sales Users

- Review the Dashboard regularly to stay up to date on key alerts and metrics.
- Click on metric tiles or alerts to quickly drill into detailed lists.
- Use the search and filter tools to find information faster.
- Explore resource and support links for helpful materials and training.
- Log out when finished to keep your account secure.

Sales workflow shortcut:

Before a client meeting, start on the Dashboard to scan alerts and metrics, open Book of Business for account or member details, and then use Resources & Support for product guides or training materials.

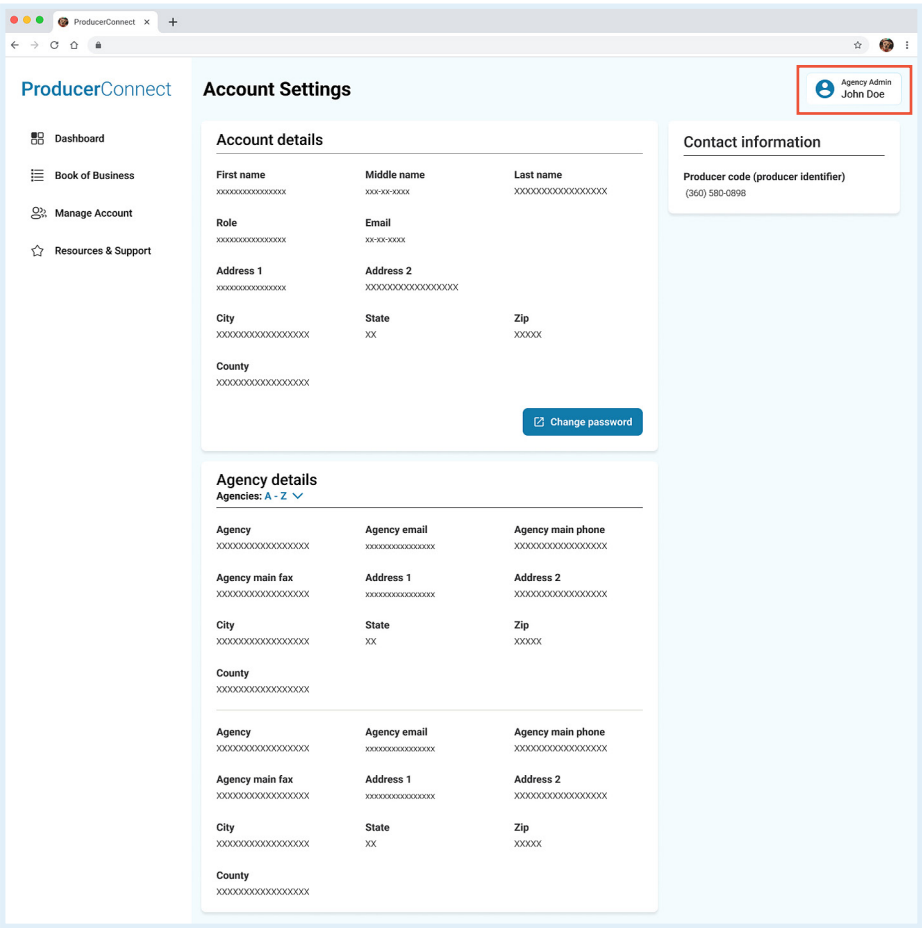
Data and Integrity

- The Dashboard shows the latest available metrics, alerts, and quick links based on your role and access.
- Information updates automatically as source data changes or new activity becomes available.
- Use dashboard metrics as a starting point and then open the related page to review full details before taking action.
- If a tile, alert, or quick link doesn't match what you expect, confirm your role, agency context, or source record before reporting an issue.

User Profile Screen Navigation

What you can do here: Review your account details, confirm agency information where available, keep your contact information current, and change your password regularly.

Role	Can access this screen
Producer Admin	No
Sales	No
Agency Admin	Yes
Agency Account Manager	Yes
Producer	Yes



Role visibility note: The User Profile screen is available to agency and producer roles. **Internal admin and sales roles may use different access or identity management processes.**

1. Select your name or profile icon from the main menu to open the User Profile screen.
2. Use it to view profile and account details, review agency information where available, change your password, and log out securely.
3. Return to the main menu at any time to continue navigating ProducerConnect.

Quick Tips for Sales Users

- Review your profile details regularly to make sure your information is correct.
- Use the contact link or phone number shown if you spot errors in your profile.
- Change your password every 90 days or whenever you feel your account security may be at risk.
- Always log out when finished, especially on shared computers.
- Keep your contact information up to date to receive important notifications.

Data & Integrity

- The User Profile screen shows your latest personal and agency details as stored in the system.
- Information updates automatically as changes are made by authorized staff.
- If you see incorrect information, contact support
- Profile details are kept accurate and up to date for all users.



Sales workflow shortcut:

Before sharing portal guidance with a producer or agency user, remind them to confirm their profile details and log out when finished, especially on shared devices.

Book of Business Screen Navigation

What you can do here: Find the assigned account and other information details you need, quickly and in one place, to help you prepare for client conversations.

1. From the main menu, select Book of Business.
2. Use the available tabs, search, filters, and sorting options to find account, policy, group, member, or line-of-business information.
3. Open account or member details for more information and then use export or print options when needed.

ProducerConnect Book of Business Agency Admin John Doe

Select group type

Large group 2,350 Small group 6,820 Individual 10 Medicare Supplement 1

Agency: Northwest Benefits Group

Producer: All producers

Account name	Account ID	Status	Company	Employees	Effective date	Renewal date	Details
Alpine Ridge Healthcare Serv...	A-1045823	Active	WA	240	01/01/2024	12/31/2024	View details
adfosdhsdhsdhsdhsdhsdhsd...	A-1109476	Pending	WA	985	01/01/2024	12/31/2024	View details
Evergreen Dental	A-1004821	Active	AK	1,025	01/01/2024	01/01/2024	View details
Northshore Technology Solutions	A-1012398	Active	WA	2,400	12/31/2024	01/01/2024	View details
Northwest Integrated Health Systems and...	P-199204	Cancelled	WA	12,750	12/31/2024	01/01/2024	View details
Pioneer Industrial Supply	A-1027745	Active	WA	5,300	12/31/2024	01/01/2024	View details
Summit Environmental Care...	P-199204	Active	WA	112	12/31/2024	01/01/2024	View details
Sounshore Hospitality Group	A-1045823	Active	WA	900	12/31/2024	01/01/2024	View details
Westlake Financial Advisors	P-199204	Active	WA	5,300	12/31/2024	01/01/2024	View details
Willamette Packaging Co.	A-1069012	Active	WA	5,300	12/31/2024	01/01/2024	View details

10 Items per page 1-10 of 200 items Last updated: 03/27/2026 1 of 44 pages

[Insight Reporter](#) [Print](#) [Export](#)

Role visibility note: Book of Business access is available to all listed roles, but the accounts, groups, members, and actions shown depend on role, agency assignment, and line of business.

Book of Business Screen Navigation, continued

ProducerConnect

Dashboard

Book of Business

Manage Account

Resources & Support

Details: Evergreen Dental

Book of Business / Details page

Agency Account Manager
John Doe

Individual information

Subscriber name	Member ID (Subscriber ID)	Language
Relationship code	SSN	Ethnicity
Marital status	Member count	Original effective date
DOB	Gender	

Subscriber contacts

Phone
Email
County
Address

Dependent information

Dependent	Member ID	Relationship
Dependent	Member ID	Relationship
Dependent	Member ID	Relationship
Dependent	Member ID	Relationship

Plan details

Plan name	Product Name	Coverage type
Coverage level	Effective date	Expiration date
Plan name	Product Name	Coverage type
Coverage level	Effective date	Expiration date

Payment details

Subsidy amount	Payment status	Payment due date
Total premium		

Primary care provider

Provider name
Location name
Provider type
Effective date
Expiration date

Producer & agency

Agency
Producer name
Producer NPN
Broker ID



Quick Tips for Sales Users

- Use the filters to quickly find specific accounts or members.
- Sort columns to organize your list the way you prefer.
- Export your list for offline review or sharing with colleagues.
- Open account details for the most up-to-date information.
- Print your list if you need a paper copy for meetings.
- Check external links for additional tools and resources.

Sales workflow shortcut: Before a client meeting, filter Book of Business to the account or member you need, open the detail view, and export or print only when a paper or offline copy is needed.

Data and Integrity

- This screen shows your most current account and policy information.
- Information updates automatically as changes are made.
- Review your list regularly to make sure everything is correct.
- Exported files include all the data you see on this screen.

Manage Account Screen Navigation

What you can do here: Support user access, keep account manager information current, and resolve registration issues when authorized.

Role visibility note: Manage Account is limited to authorized admin and sales roles. **Producers and agency account managers may not see this option.**

1. From the main menu, select Manage Account.
2. Use the agency drop-down, search, filters, and sorting options to find users or agency account managers.
3. Authorized roles can view user details, add or update agency account managers, activate or deactivate access where allowed, and resend registration emails.

Manage Account

Agency: Northwest Benefits Group

Name	Email	Role type	Entered by	Assign producer(s)	Status	Actions
Alex Martinez	alex.martinez@aam.example.com	Producer			Active	[Edit] [Resend]
Jordan Kim	jordan.kim@aam.example.com	Agency Admin			Active	[Edit] [Resend]
Priya Patel	priya.patel@aam.example.com	Account Manager			Active	[Edit] [Resend]
Michael O'Connor	michael.oconnor@aam.example.com	Producer			Active	[Edit] [Resend]
Christina Nguyen	christina.nguyen@aam.example.com	Account Manager			Deactivated	[Edit] [Resend]
David Reynolds	david.reynolds@aam.example.com	Account Manager			Active	[Edit] [Resend]
Sofia Alvarez	sofia.alvarez@aam.example.com	Producer			Active	[Edit] [Resend]
Brian Thompson	brian.thompson@aam.example.com	Producer			Active	[Edit] [Resend]
Emily Chen	emily.chen@aam.example.com	Producer			Active	[Edit] [Resend]
Marcus Williams	marcus.williams@aam.example.com	Producer			Active	[Edit] [Resend]

10 Items per page 1-10 of 200 items Last updated: 03/27/2026 1 of 44 pages [Insight Reporter] [Print]

Sales workflow shortcut: If a producer or agency user cannot find their invitation, open Manage Account, confirm the user record, and use resend registration email when available.



Quick Tips for Sales Users

- Review user lists regularly to keep your organization's accounts up to date.
- Use the search and filter tools to quickly find specific users.
- Double-check before deactivating any user to avoid interrupting their access.
- Use the resend registration email feature if a user cannot find their invitation.
- Keep agency account manager details accurate for better team support.

Data & Integrity

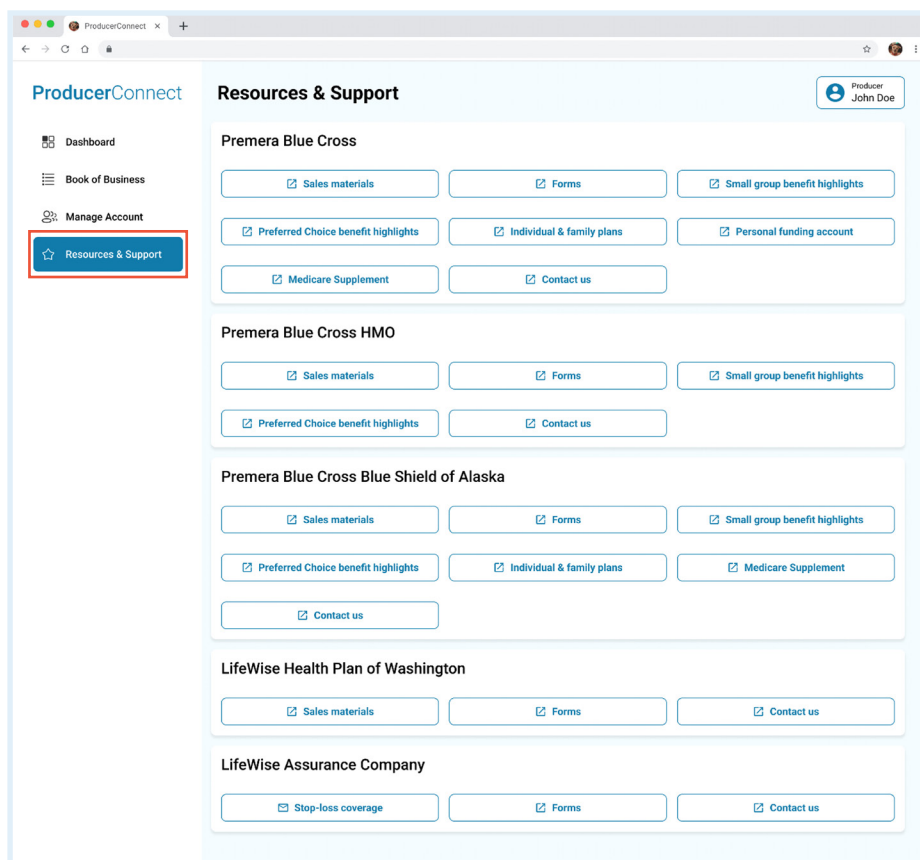
- This screen always shows the latest user and agency account manager information for your agency or organization.
- User lists update automatically as changes are made.
- Review your account details regularly to keep your organization's records accurate.
- Use the search and filter tools to ensure you're working with the most current data.

Resources & Support Screen Navigation

What you can do here: Use Resources & Support to find training materials, product guides, support content, and helpful links without leaving the portal workflow.

Best for: Finding quick answers, sharing product or training materials, and pointing producers or agency users to support resources.

1. From the main menu, select Resources & Support.
2. Browse or search for training materials, product guides, support content, and helpful resources.
3. Open selected resources in a new browser tab when available, then return to the portal to continue working.



Sales workflow shortcut: When preparing for a producer or client conversation, open Resources & Support to grab the latest product guide, training material, or support reference before the meeting.

External Links/Single Sign-On Navigation

What you can do here: Use External Links and Single Sign-On to access authorized tools and systems from ProducerConnect when they are available for your role and line of business.

Best for: Moving from ProducerConnect into related tools without starting a separate login process, when single sign-on is available.

1. Use available external links from the Dashboard, Book of Business, or other authorized areas of ProducerConnect.
2. External tools and systems open in a new browser tab when available for your role and line of business.
3. Return to ProducerConnect when finished to continue using portal features.

Sales workflow shortcut:

If you need a related tool during account review, use the authorized external link from ProducerConnect, complete the task in the new tab, then return to the portal to continue working.

Troubleshooting

Issue	Try this first	If it still doesn't work
Page won't load	Refresh your browser and confirm your internet connection.	Try another supported browser or contact support.
Can't log in	Check your User ID and password, then use Forgot Password if needed.	Contact the appropriate admin or support team for access help.
Account locked	Use the unlock account link sent to your registered email.	Contact support if the unlock link is missing or expired.
Expected data is missing	Confirm you're in the correct role, agency context, and line of business.	Contact support with the account, group, or member details you expected to see.
External links don't open	Check your browser pop-up blocker settings.	Confirm the link is available for your role and line of business.
Access removed in EDGE, but user can still access ProducerConnect	Allow 30–40 minutes for the access removal to sync from EDGE to ProducerConnect.	If the user still has access after the sync window, contact support and include the user's name, role, agency, and time access was removed in EDGE.
Session timeout after 15 minutes of inactivity	Use keyboard, mouse, scroll, or touch activity anywhere in the app to keep the session active. A warning appears 2 minutes before the 15-minute inactivity timeout to let the user know their session is about to end.	If you are logged out, sign back in to ProducerConnect and continue working. Save or complete any in-progress work before stepping away when possible.
MFA verification fails	Try MFA verification again. You can attempt verification up to three times.	After the third failed attempt, you will be directed to the Forgot Password/Unlock Account page. Follow the on-screen process to recover or unlock your account.
No access after selecting the Insight Reporter link	Confirm that you have been authorized to use Insight Reporter.	To request access, work with your Premera Sales representative to complete the authorization form, obtain your group's signature, and return the completed form to Sales.

Security Guidelines

Do	Don't
Log out when using a shared or public computer.	Don't share your password, login link, or verification code.
Use strong, unique passwords and update them regularly.	Don't save credentials on shared computers or browsers.
Report suspicious activity or unexpected account changes.	Don't click unknown or suspicious links.

Glossary

Term	What it means	Why it matters
Agency Account Manager (AAM)	A delegate user created by an Agency Admin to assist producers.	Helps agencies support daily producer and account activity.
Auth0	The authentication platform used for secure login and user management.	Supports secure access to ProducerConnect.
Book of Business (BoB)	The portfolio of employer groups, accounts, and members assigned to producers.	A key place to prepare for client conversations and account review.
EDGE	The legacy CRM system where producer and agency data originates.	Source data may affect what appears in ProducerConnect.
Line of Business (LOB)	Types of insurance offered, such as Individual & Family, Group, or Medicare Supplement.	Helps explain which accounts, tools, and links a user can see.
Multi-Factor Authentication (MFA)	Additional login security using verification methods.	Helps protect account and business information.
ProducerConnect	The secure web portal described in this guide.	Gives users one place to access key producer and agency tools.
RBAC (Role-Based Access Control)	A system that controls what users can see and do based on their role.	Explains why screens and actions may vary by user.

Appendix

Appendix items may include: screenshot references, role/access matrices, support contacts, release notes, related resources, or future portal updates.

Figure A-1. Book of Business Details — Individual Line of Business

ProducerConnect

Dashboard

Book of Business

Manage Account

Resources & Support

< Details: Evergreen Dental

Book of Business / Details page

Agency Account Manager
John Doe

Individual information

Subscriber name

Member ID (Subscriber ID)

Language

Relationship code

SSN

Ethnicity

Marital status

Member count

Original effective date

DOB

Gender

Subscriber contacts

Phone

Email

County

Address

Dependent information

Dependent

Member ID

Relationship

Dependent

Member ID

Relationship

Dependent

Member ID

Relationship

Dependent

Member ID

Relationship

Plan details

Plan name

Product Name

Coverage type

Coverage level

Effective date

Expiration date

Plan name

Product Name

Coverage type

Coverage level

Effective date

Expiration date

Payment details

Subsidy amount

Payment status

Payment due date

Total premium

Payment history

Due Date	Billed Amount	Paid Amount	Payment Method	Balance Amount
01/01/2020	999,999,999	999,999,999	XXXXXXXXXXXXXXX	01/01/2020
02/01/2020	999,999,999	999,999,999	XXXXXXXXXXXXXXX	02/01/2020
03/01/2020	999,999,999	999,999,999	XXXXXXXXXXXXXXX	03/01/2020
04/01/2020	999,999,999	999,999,999	XXXXXXXXXXXXXXX	04/01/2020
05/01/2020	999,999,999	999,999,999	XXXXXXXXXXXXXXX	05/01/2020
06/01/2020	999,999,999	999,999,999	XXXXXXXXXXXXXXX	06/01/2020
07/01/2020	999,999,999	999,999,999	XXXXXXXXXXXXXXX	07/01/2020
08/01/2020	999,999,999	999,999,999	XXXXXXXXXXXXXXX	08/01/2020
09/01/2020	999,999,999	999,999,999	XXXXXXXXXXXXXXX	09/01/2020
10/01/2020	999,999,999	999,999,999	XXXXXXXXXXXXXXX	10/01/2020
11/01/2020	999,999,999	999,999,999	XXXXXXXXXXXXXXX	11/01/2020
12/01/2020	999,999,999	999,999,999	XXXXXXXXXXXXXXX	12/01/2020

Primary care provider

Provider name

Location name

Provider type

Effective date

Expiration date

Producer & agency

Agency

Producer name

Producer NPN

Broker ID

Figure A-2. Book of Business Details – Medicare Supplement Line of Business

< Details: Evergreen Dental

Book of Business / Details page

Dashboard

Book of Business

Manage Account

Resources & Support

Medicare Supplement information

Subscriber name	Member ID (Subscriber ID)	Language
XXXXXXXXXXXXXXX	X00-XZ-XXXX	XXXXXXXXXXXXXXXXXX
Relationship code	Member count	Original effective date
XXXXXXXXXXXXXXX	XXXXXXXXXXXXXXX	X0-X0-XXXX
Ethnicity	Marital status	DOB
XXXXXXXXXXXXXXX	XXXXXXXXXXXXXXX	XXXXXXXX
Gender		
XXXXXXXXXXXXXXX		

Plan details

Plan name	Product Name	Coverage type
XXXXXXXXXXXXXXX	XXXXXXXXXXXXXXX	XXXXXXXXXXXXXXXXXX
Coverage level	Effective date	Expiration date
XXXXXXXXXXXXXXX	XXXXXXXXXXXXXXX	XXXXXXXXXXXXXXX

Products

- F3T HSA HeritagePlus Aggregate NGF
- F3T HSA HeritagePlus Aggregate NGF
- F3T HSA HeritagePlus Aggregate NGF
- F3T HSA HeritagePlus Aggregate NGF
- F3T HSA HeritagePlus Aggregate NGF
- F3T HSA HeritagePlus Aggregate NGF

Payment history

Due Date	Billed Amount	Paid Amount	Payment Method	Balance Amount
DD/MM/YYYY	\$99,999,999	\$99,999,999	XXXXXXXXXXXXXXXXXX	DD/MM/YYYY
DD/MM/YYYY	\$99,999,999	\$99,999,999	XXXXXXXXXXXXXXXXXX	DD/MM/YYYY
DD/MM/YYYY	\$99,999,999	\$99,999,999	XXXXXXXXXXXXXXXXXX	DD/MM/YYYY
DD/MM/YYYY	\$99,999,999	\$99,999,999	XXXXXXXXXXXXXXXXXX	DD/MM/YYYY
DD/MM/YYYY	\$99,999,999	\$99,999,999	XXXXXXXXXXXXXXXXXX	DD/MM/YYYY
DD/MM/YYYY	\$99,999,999	\$99,999,999	XXXXXXXXXXXXXXXXXX	DD/MM/YYYY
DD/MM/YYYY	\$99,999,999	\$99,999,999	XXXXXXXXXXXXXXXXXX	DD/MM/YYYY
DD/MM/YYYY	\$99,999,999	\$99,999,999	XXXXXXXXXXXXXXXXXX	DD/MM/YYYY
DD/MM/YYYY	\$99,999,999	\$99,999,999	XXXXXXXXXXXXXXXXXX	DD/MM/YYYY
DD/MM/YYYY	\$99,999,999	\$99,999,999	XXXXXXXXXXXXXXXXXX	DD/MM/YYYY
DD/MM/YYYY	\$99,999,999	\$99,999,999	XXXXXXXXXXXXXXXXXX	DD/MM/YYYY
DD/MM/YYYY	\$99,999,999	\$99,999,999	XXXXXXXXXXXXXXXXXX	DD/MM/YYYY

Key contacts

Account key contact
Julie Cage

Type
Benefit Administrator

Phone
(360) 580-0898

Fax
SolarBright Solutions

Email
email@psitech.com

Sales account team

Sales name
Julie Cage

Phone
xxxxxxxxxx

Email
email@psitech.com

Producer & agency

Agency
Pacific Benefits Group

Producer name
Jeffrey Lindstrom

Producer NPN
987654321

Broker ID
XXXXXXXXXXXXXXXXXX

Appendix

Figure A-3. Book of Business Details — Small Group Line of Business

ProducerConnect

Dashboard

Book of Business

Manage Account

Resources & Support

< Details: Evergreen Dental

Book of Business / Details page

Agency Admin
John Doe

Small group Information

Account name
XXXXXXXXXXXXXXXXXXXX

Account number
XXXXXXXXXXXXXXXXXXXX

Company
PBC-IMO

Parent account name
XXXXXXXXXXXXXXXXXXXX

Parent account number
XX-XX-XXXX

Funding type
XXXXXXXXXXXXXXXXXXXX

Original effective date
XXXXXXXXXXXXXXXXXXXX

Termination date
XXXXXXXXXXXXXXXXXXXX

Payment due date
XXXXXXXXXXXXXXXXXXXX

Total members
XXXXXXXXXXXXXXXXXXXX

Tax ID
XXXXXXXXXXXXXXXXXXXX

Payment status
MegaWat Electric LLC

Payment status
Paid in full

Group status
Paid in full

Products

F3T HSA HeritagePlus Aggregate NGF

F3T HSA HeritagePlus Aggregate NGF

F3T HSA HeritagePlus Aggregate NGF

F3T HSA HeritagePlus Aggregate NGF

F3T HSA HeritagePlus Aggregate NGF

F3T HSA HeritagePlus Aggregate NGF

F3T HSA HeritagePlus Aggregate NGF

Payment history

Due Date

Billed Amount

Paid Amount

Payment Method

Balance Amount

DD/MM/YYYY

999,999,999

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