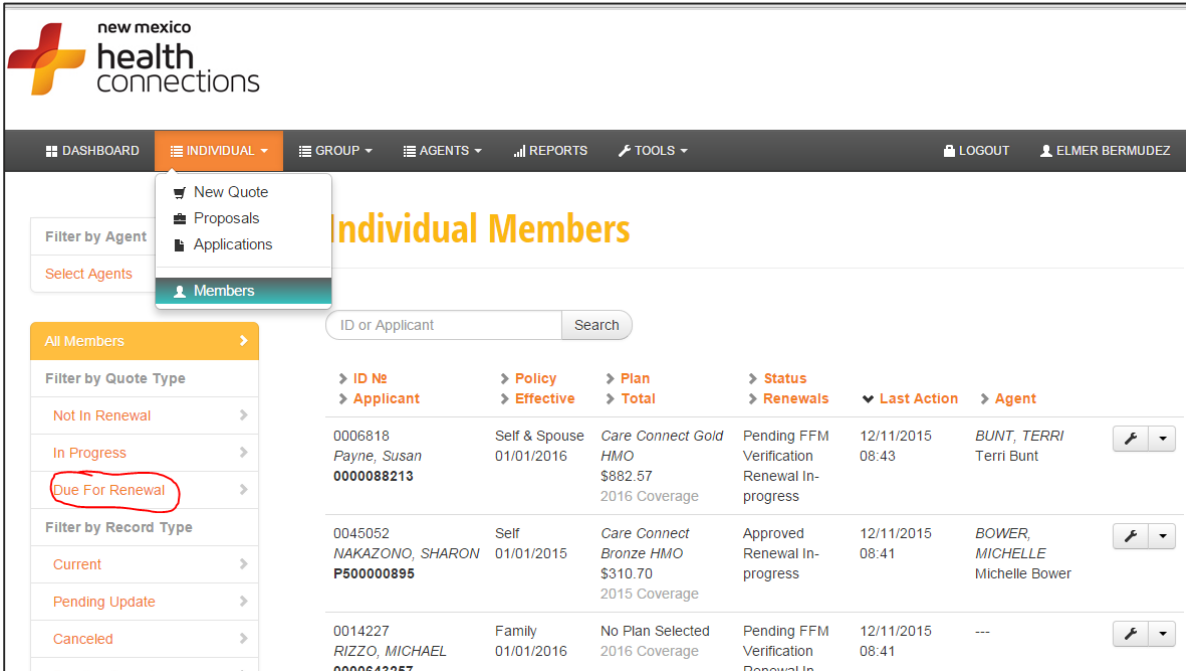


1. Log in to the Broker Portal. Select the *Individual* button, then the *Members* button.
2. Select the *Due for Renewal* button on the left side.
3. In the search field, enter your client's last name.



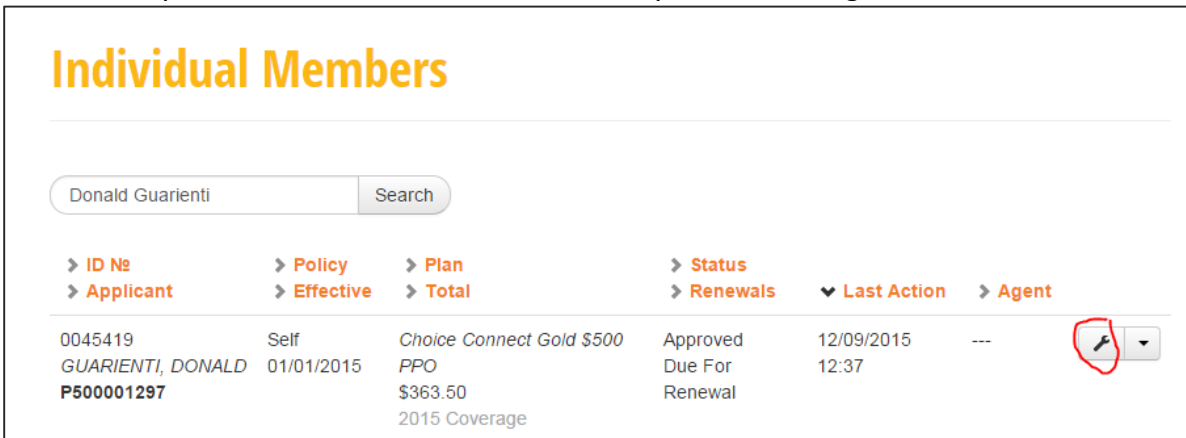
**Individual Members**

Filter by Agent: Select Agents, Members

Filter by Quote Type: Not In Renewal, In Progress, **Due For Renewal**, Filter by Record Type: Current, Pending Update, Canceled

ID No Applicant	Policy Effective	Plan Total	Status Renewals	Last Action	Agent
0006818 Payne, Susan 0000088213	Self & Spouse 01/01/2016	Care Connect Gold HMO \$882.57 2016 Coverage	Pending FFM Verification Renewal In- progress	12/11/2015 08:43	BUNT, TERRI Terri Bunt
0045052 NAKAZONO, SHARON P500000895	Self 01/01/2015	Care Connect Bronze HMO \$310.70 2015 Coverage	Approved Renewal In- progress	12/11/2015 08:41	BOWER, MICHELLE Michelle Bower
0014227 RIZZO, MICHAEL 000043257	Family 01/01/2016	No Plan Selected 2016 Coverage	Pending FFM Verification Renewal In- progress	12/11/2015 08:41	---

4. Find your client, then click on the wrench symbol to the right of his or her name.



**Individual Members**

Search: Donald Guarienti

ID No Applicant	Policy Effective	Plan Total	Status Renewals	Last Action	Agent
0045419 GUARIENTI, DONALD P500001297	Self 01/01/2015	Choice Connect Gold \$500 PPO \$363.50 2015 Coverage	Approved Due For Renewal	12/09/2015 12:37	---

5. Click *Create Proposal & Renew Coverage*.

← Back **Individual Member .. DONALD GUARIENTI (45419)** Profile Basic Info Benefits Documents Life Events

**Due For Renewal**  
Policy is currently due for renewal.

### Benefits For 2015

Choice Connect Gold \$500 PPO	<b>\$363.50</b>
<b>Total Monthly Premium \$363.50</b>	

### Basic Information

Spouse: **No**  
 Number of Kids: **0**  
 Effective Date: **01/01/2015**

913 NOVAL PLACE NW,  
 ALBUQUERQUE, NM 87114  
 (505) 228-5651

Carrier Member ID: **P500001297**  
 Carrier Policy Number: **P900010001**

### Quick Links

- [Create Proposal & Renew Coverage](#)
- [Opt Out of Coverage for Next Year](#)
- [Status History](#)
- [Add Dependent](#)
- [Term / Cancel Policy](#)

EDI Tools

- [Download 834](#)
- [Download 820](#)
- [Simulate 834](#)
- [Re-Send 834](#)

6. If you need to change any information for your client, this is the area where you can edit your client's record, including adding or deleting dependents. If there are no changes, click *Next*.

← Back **Individual Member .. DONALD GUARIENTI (45419)** Profile Basic Info Benefits Documents Life Events

✖ Cancel **Next** ▶

### Members Covered / Renewing

Family Members	Included In 2016 Coverage
GUARIENTI, DONALD	<input checked="" type="radio"/> Yes <input type="radio"/> No <input type="text" value=""/>

[+ Add Spouse/Domestic Partner](#) [+ Add Dependent](#)

### Contact

**Home Address:** 913 NOVAL PLACE NW  
 ALBUQUERQUE, BERNALILLO County, NM 87114

**Mailing Address:** 425 EDMON NE  
 ALBUQUERQUE, BERNALILLO County, NM 87107

**Primary Phone No:** (505) 228-5651

**Secondary Phone No:** ---

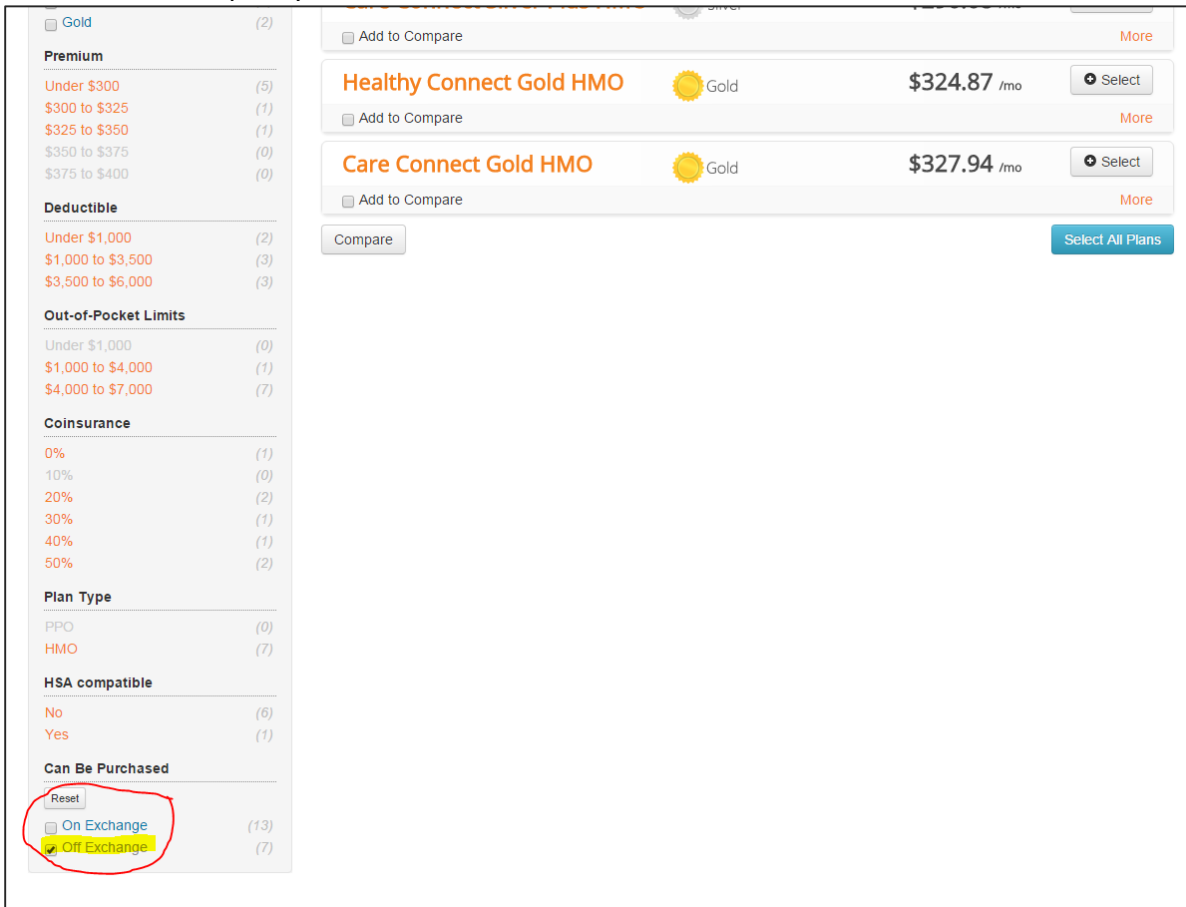
**Email Address:** ---

### ACA Information

Annual Income:	---
HouseHold Size:	2
Employer Coverage Available?	---
Indian tribe or Alaska Native tribal entity?	---
Certificate Of Exemption	---

✖ Cancel **Next** ▶

7. **Important:** Check the *Off-Exchange* box at the bottom left in order to hide plans for which your client does not qualify.



The screenshot displays the plan selection interface in the NMHC Broker Portal. On the left, a sidebar contains various filters categorized by Premium, Deductible, Out-of-Pocket Limits, Coinsurance, Plan Type, HSA compatible, and Can Be Purchased. The 'Can Be Purchased' section at the bottom left is circled in red, showing the 'Off Exchange' option selected with a checkmark. The main area on the right shows two plan cards: 'Healthy Connect Gold HMO' with a monthly premium of \$324.87 and 'Care Connect Gold HMO' with a monthly premium of \$327.94. Both plans are marked as 'Gold' and include 'Add to Compare' and 'Select' buttons. At the bottom of the main area, there are 'Compare' and 'Select All Plans' buttons.








Filter Category	Filter Option	Count
Premium	Under \$300	(5)
	\$300 to \$325	(1)
	\$325 to \$350	(1)
	\$350 to \$375	(0)
	\$375 to \$400	(0)
Deductible	Under \$1,000	(2)
	\$1,000 to \$3,500	(3)
	\$3,500 to \$6,000	(3)
	Out-of-Pocket Limits	
Out-of-Pocket Limits	Under \$1,000	(0)
	\$1,000 to \$4,000	(1)
	\$4,000 to \$7,000	(7)
Coinsurance	0%	(1)
	10%	(0)
	20%	(2)
	30%	(1)
	40%	(1)
	50%	(2)
Plan Type	PPO	(0)
	HMO	(7)
HSA compatible	No	(6)
	Yes	(1)
Can Be Purchased	On Exchange	(13)
	Off Exchange	(7)

8. Choose the desired plan by clicking the *Select* button to the right of the plan name. Then click *Continue*.

## Proposal : Select Plans

**Step 3 of 4** .. Use the 'Select' button to choose plans for each needed benefit type. Once you have added all desired plans to the cart, click 'Continue' to review. You can also filter and compare plans.

Compare
Select All Plans
Continue >

<p><b>Healthy Connect Bronze HMO</b>  Bronze</p> <p><input type="checkbox"/> Add to Compare <span style="float: right;">More</span></p>	<p><b>\$207.69</b> /mo</p>	<p><input type="button" value="Select"/></p>
<p><b>Care Connect Bronze HMO</b>  Bronze</p> <p><input type="checkbox"/> Add to Compare <span style="float: right;">More</span></p>	<p><b>\$220.66</b> /mo</p>	<p><input type="button" value="Select"/></p>
<p><b>Care Connect HDHP Silver HMO</b>  Silver</p> <p><input type="checkbox"/> Add to Compare <span style="float: right;">More</span></p>	<p><b>\$258.64</b> /mo</p>	<p><input type="button" value="Select"/></p>
<p><b>Care Connect Silver HMO</b>  Silver</p> <p><input type="checkbox"/> Add to Compare <span style="float: right;">More</span></p>	<p><b>\$260.30</b> /mo</p>	<p><input type="button" value="Select"/></p>
<p><b>Care Connect Silver Plus HMO</b>  Silver</p> <p><input type="checkbox"/> Add to Compare <span style="float: right;">More</span></p>	<p><b>\$290.08</b> /mo</p>	<p><input type="button" value="Select"/></p>
<p><b>Healthy Connect Gold HMO</b>  Gold</p> <p><input type="checkbox"/> Add to Compare <span style="float: right;">More</span></p>	<p><b>\$324.87</b> /mo</p>	<p><input type="button" value="Select"/></p>
<p><b>Care Connect Gold HMO</b>  Gold</p> <p><input type="checkbox"/> Add to Compare <span style="float: right;">More</span></p>	<p><b>\$327.94</b> /mo</p>	<p><input checked="" type="button" value="Selected"/></p>

Compare
Select All Plans
Continue >

- Review and verify your client's information. If everything is correct, click *Confirm Enrollment*. If you need to make changes, click the *Back* button at the top of the screen. After all changes have been made, click *Confirm Enrollment*.
- If your client has not decided which plan to move to, name your proposal and click the *Save* button at the bottom of the screen. You can return to it later. You may also email the proposal to your client and allow him or her to complete the change with his or her e-signature.

[Back](#) **Individual Member .. DONALD GUARIENTI (45419)**
[Profile](#) [Basic Info](#) [Benefits](#) [Documents](#) [Life Events](#)

### Proposal Review

Gender	Relation	Birth Date	Tobacco?	Coverage	<a href="#">Edit</a>
Male	Subscriber	06/01/1965 (50)	No	Renew	

#### Selected Coverage

Coverage	ZIP Code	Effective
Medical	87114	January 2016

Plan Type	Plan Name	Description	Quote	<a href="#">Edit</a>
Medical	Care Connect Gold HMO	Copay for In-Patient stay	\$327.94	

[Back to Products](#)

[Save](#)
[Email](#)
[Save as PDF](#)
[Start App on Marketplace](#)
[Confirm Enrollment](#)

- Complete the electronic signature and click *Complete Enrollment*.

### Review the statement below

I understand that my premium may have changed as a result of the changes to my coverage. I represent my data to be true to the best of my knowledge and to accurately represent the persons enrolling for coverage. I understand that these statements, answers and subsequent information I provide are the basis for this coverage.

Agree

### DONALD GUARIENTI electronic signature


[Cancel](#)
[Complete Enrollment](#)

- A confirmation screen will appear. No further action is necessary.

[Back](#) **Individual Member .. DONALD GUARIENTI (45419)**
[Profile](#) [Basic Info](#) [Benefits](#) [Documents](#) [Life Events](#)

**Renewal Submitted**  
Coverage renewal has been submitted!

#### Benefits For 2016

	Care Connect Gold HMO	\$327.94
Total Monthly Premium		\$327.94

#### Basic Information

Spouse: **No**  
 Number of Kids: **0**  
 Effective Date: **01/01/2016**

913 NOVAL PLACE NW,  
 ALBUQUERQUE, NM 87114  
 (505) 228-5651

Carrier Member ID: **P500001297**  
 Carrier Policy Number: **P900010001**

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