Allied National Online Group Enrollment System
User Guide for Agents and Employers

The Allied National Online Group Enrollment System is designed to give agents and employers a tool for easily completing health plan applications for both initial enrollment and plan add-ons. This system should streamline the application process, reduce errors and decrease paper usage.

System Features:

Allied agents and employer groups can use the online enrollment system to manage both the group's initial enrollment with Allied as well as enrollment of subsequent new hires. The agent and employer contact can see which employees have created an account, whether they are waiving coverage or applying for coverage and the status of their enrollment form (i.e. in process, completed). Personal Health Information can only be seen by the employee.

The account set up by Allied determines which products are available for enrollment, and only forms for those products are available to the employee. The employee can choose to download hard copies of the waiver or enrollment card or complete them online. Once "signed," the form is marked completed. The employee may edit and re-sign the form at any time.

During the initial enrollment process, the agent and employer can monitor each employee's activity. Once the enrollment process is completed, Allied will download the applications and begin the underwriting process. Once the initial applications have been downloaded, any new applications (or applications re-signed) will automatically be sent to Allied.

Enrollment Process:

For Agents

To enroll your group, call Sales Support at 888-767-7133.
We will request the following information:
- If you are not currently a registered agent on the enrollment site we'll need:
    - Your name as you wish it to appear on the site
    - The email address you want to use to register to the site
    - The general agent's name associated with this enrollment (if any)
- The name of the group you wish to add
- Optional – name and email address of the company contact or human resources administrator who will be responsible for managing the enrollment
- Target date for enrollment to be completed

After we set up your group in the enrollment system and email you the employee enrollment link, please follow the steps below: (Agents and company contacts can find the employee enrollment link under the group information section of the system).

1. This link should be provided to all employees to complete the appropriate forms to waive or enroll in the plan by a given deadline. The link may be distributed via email or posted to the company's intranet. Once the link has been distributed to all eligible employees, they can open the link and register using their email address and complete either the enrollment form or the waiver.

If you do not currently have an account on the online enrollment system, you will receive an email to complete the registration process.

2. Once the group has completed enrollment, please contact Allied Sales Support at 888-767-7133. Applications will be downloaded for underwriting review. If this is for a prescreen, and you wish to review the applications prior to submission, please advise us at this time and the downloaded applications will be provided to your office instead of Allied underwriting.

For Employer Contact/Human Resources

- You will receive an email from Allied requesting you to complete registration as the company contact in the system.
- Once you have completed registration, you will be able to monitor the enrollment status of your group. You will be able to see which employees have established an enrollment account and the status of completing the appropriate enrollment or waiver forms.
- The employee enrollment link is displayed on the group's detail page. It can be copied for use as a link in an email or posted to the company intranet.
- **If you are eligible for the plan, you will need to create a separate account for your enrollment by following the same email link provided to your employees. This is to ensure your personal data cannot be seen by anyone at your company.**
- Once all of the forms have been completed, call or email your agent who will alert Allied that your enrollment is ready to be downloaded. Once the initial enrollment is completed, new hires (or stragglers on the initial enrollment) can continue to use the system. Their applications will automatically be downloaded to Allied underwriting.

Thank you for using the Allied National Online Group Enrollment System. If you have any suggestions for improvements, please share them with your agent. We value your feedback.