

agent back office user guide

Allstate[®]
HEALTH SOLUTIONS



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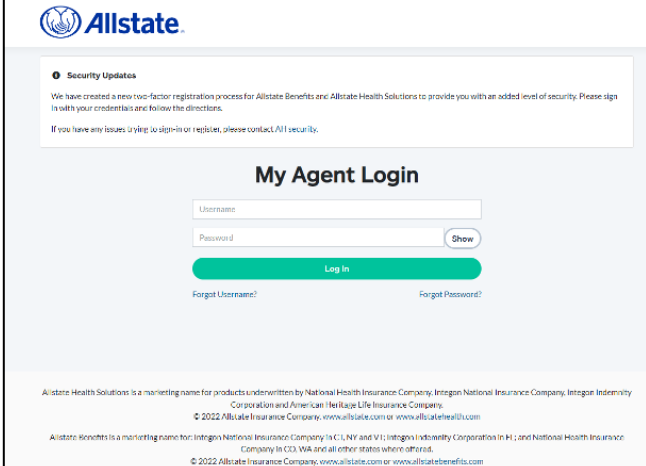
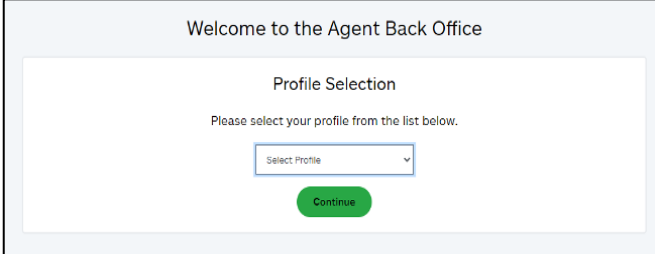
Allstate Health Solutions markets products underwritten by National Health Insurance Company and American Heritage Life Insurance Company.

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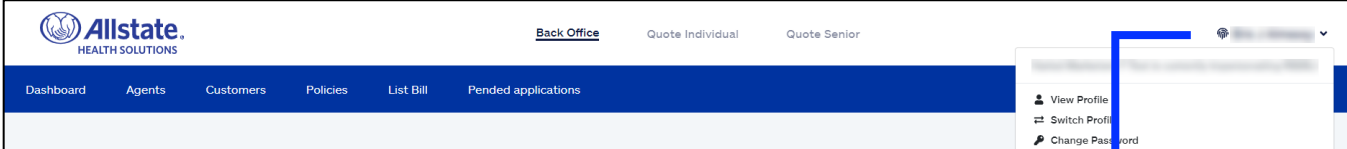
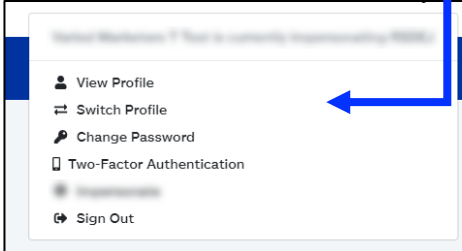
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Sign in

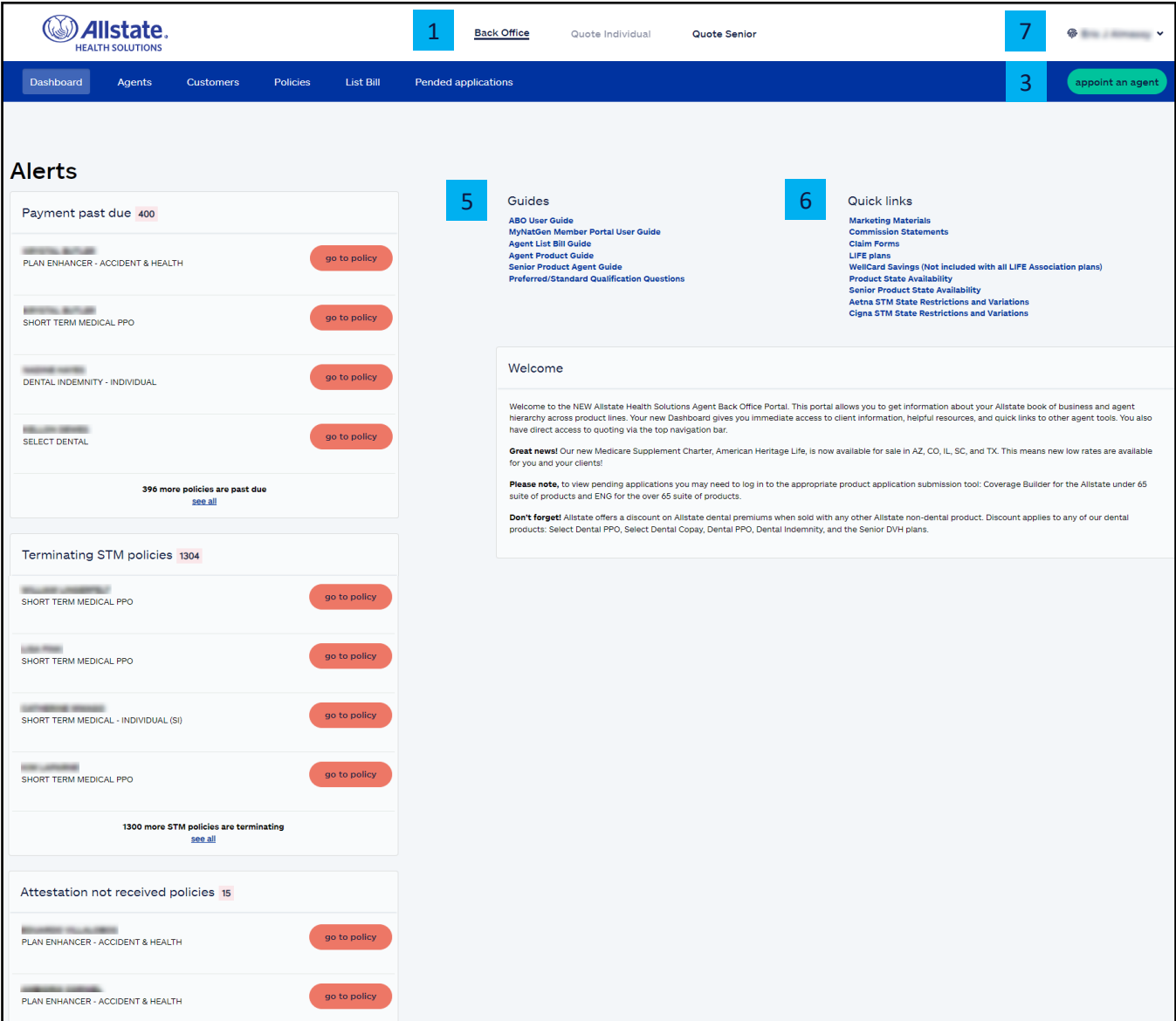
- The username is not case sensitive. ABO sign in credentials are the same as the AMS sign in credentials.
- Check **Remember Me** if you would like your sign in to be remembered, even after you close your browser.
- When there is more than one NPN for the agent, the following **Profile Selection** page will display.
- Click the down arrow to display available profiles to choose from. Select desired profile and click **Continue**.
- Agent Back Office (ABO) **Dashboard Page** displays. You can now access agents, customers, policies, list bill and pended applications for the selected profile.

To access information for other profiles, click on the **Profile icon** in the upper right corner of any page and click on **Switch Profile**. The Profile Selection page will display. Click on other profile and click **Continue** to sign in to the other profile.

Dashboard page



The dashboard page is structured as follows:

- 1. Back Office**: Top navigation icon.
- 2. Dashboard**: Secondary navigation icon.
- 3. appoint an agent**: Action button in the top right.
- 4. Alerts**: Section containing:
 - Payment past due **400**
 - PLAN ENHANCER - ACCIDENT & HEALTH (go to policy)
 - SHORT TERM MEDICAL PPO (go to policy)
 - DENTAL INDEMNITY - INDIVIDUAL (go to policy)
 - SELECT DENTAL (go to policy)
 - 396 more policies are past due** (see all)
 - Terminating STM policies **1304**
 - SHORT TERM MEDICAL PPO (go to policy)
 - SHORT TERM MEDICAL PPO (go to policy)
 - SHORT TERM MEDICAL - INDIVIDUAL (SI) (go to policy)
 - SHORT TERM MEDICAL PPO (go to policy)
 - 1300 more STM policies are terminating** (see all)
 - Attestation not received policies **15**
 - PLAN ENHANCER - ACCIDENT & HEALTH (go to policy)
 - PLAN ENHANCER - ACCIDENT & HEALTH (go to policy)
- 5. Guides**:
 - ABO User Guide
 - MyNatGen Member Portal User Guide
 - Agent List Bill Guide
 - Agent Product Guide
 - Senior Product Agent Guide
 - Preferred/Standard Qualification Questions
- 6. Quick links**:
 - Marketing Materials
 - Commission Statements
 - Claim Forms
 - LIFE plans
 - WellCard Savings (Not included with all LIFE Association plans)
 - Product State Availability
 - Senior Product State Availability
 - Aetna STM State Restrictions and Variations
 - Cigna STM State Restrictions and Variations
- Welcome**:

Welcome to the NEW Allstate Health Solutions Agent Back Office Portal. This portal allows you to get information about your Allstate book of business and agent hierarchy across product lines. Your new Dashboard gives you immediate access to client information, helpful resources, and quick links to other agent tools. You also have direct access to quoting via the top navigation bar.

Great news! Our new Medicare Supplement Charter, American Heritage Life, is now available for sale in AZ, CO, IL, SC, and TX. This means new low rates are available for you and your clients!

Please note, to view pending applications you may need to log in to the appropriate product application submission tool: Coverage Builder for the Allstate under 65 suite of products and ENG for the over 65 suite of products.

Don't forget! Allstate offers a discount on Allstate dental premiums when sold with any other Allstate non-dental product. Discount applies to any of our dental products: Select Dental PPO, Select Dental Copay, Dental PPO, Dental Indemnity, and the Senior DVH plans.

The dashboard page consists of the following:

1. Navigation

Top navigation icons are displayed horizontally and static on every page. Navigation icons:

- Back Office – takes you to the dashboard page, as shown above.
- Quote Individual – takes you to the quoting platform, start quote page for under 65 products.
 - Requires logging in using your personal NPN.
- Quote Senior – takes you to the quoting platform for senior products.
 - Requires logging in using your personal NPN.

2. ABO level menu

- a. Dashboard – this tab takes you to the dashboard page, as shown above.
- b. Agents – this tab takes you to agent information, such as agent details and hierarchy.
- c. Customers – this tab takes you to your entire list of customers and your downline hierarchy’s customers.
- d. Policies – this tab takes you to your entire list of policies and your downline hierarchy’s policies.
- e. List Bill – this tab displays the list of any List Bill requests you have sent, status of those requests, and provides the ability to create a new invitation to send to new prospective List Bill clients. This is the first step in the online application process for List Bill groups.
- f. Pended Applications – this tab will display the list of pended applications.

3. Appoint an agent

- a. Appoint an agent – this button takes you to the Agent Management System (AMS) home page.
 - i. You are not required to sign in again.
 - ii. This link will only display if the agent is a recruiter.

4. Policies at risk

- a. Payment past due – the count shows your policies with an overdue payment within the past 30 days and new future dated policies with declined payments.
- b. Terminating STM policies – the count shows your STM policies that are about to terminate. Policies shown will be in the last policy period of any STM x 2, 3, or 4 sequences and any standard 30 day – 12 month policy terms.
- c. Attestation not received policies – the count shows:
 - i. Policies effective after 11/1/2017 and missing attestation (eSignature or Voice Verification). Voice verifications take up to two days to get recorded.
 - ii. Currently active policies (includes policies with future termination dates).
 - iii. Excludes LIFE Association policies (except for MyLIFEWellness).
 - iv. This function does not apply to policies submitted by Agile, AHIX API, eHealth XML, Quotit Customer (ePro), SureCo API, UHOneAPI, or Vera Health policies.
- d. Go to policy:
 - i. Click takes you to the **Customer** page for the policy selected.
- e. Clicking **see all** takes you to the **policies page** where you can export the list to a .csv file.

5. Guides

- a. A list of reference documents.
- b. Click on a document name to open the document in .pdf format.

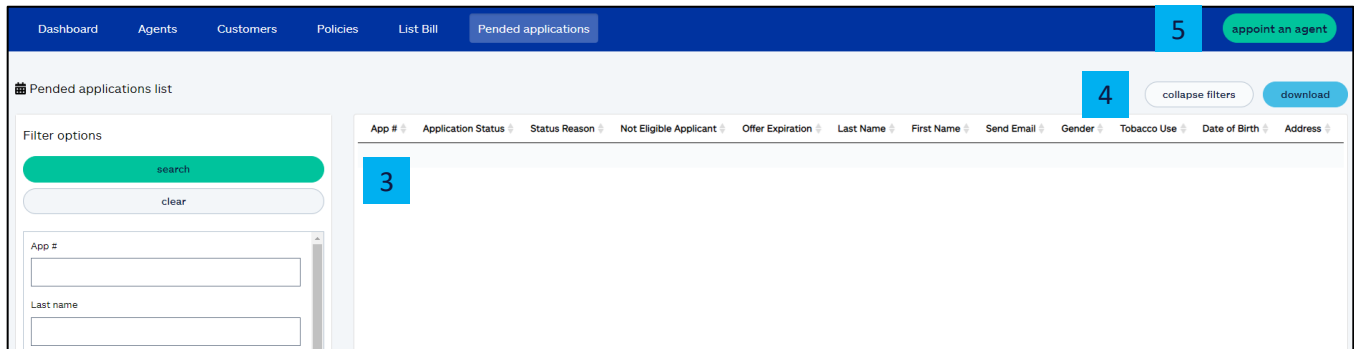
6. Quick links

- a. Claim forms – click takes you to claim submission information and forms.
- b. Other links – click on a document name to open the document in .pdf format or expand to a list to select other documents in that category.

7. Profile

Click on your name in the upper right corner to access your profile and details. You can also change your password, which will update ABO and the Agent Management System (AMS).

Page features



In addition to the navigation bar, every page you navigate to will have the following consistent features:

1. Search button

- Click **search** or place cursor in any text field and press **Enter** to view results list.
- If volume of requested data is too large, a message will display to click the **Download** button or you can use more filters to narrow the search results.

2. Filter options

- Fill out one or more of these fields to narrow your search.
- The data entered into the fields is not case sensitive.

3. Results list

- Click on any of the headings to sort in ascending or descending order. The arrow indicates the direction of the sort.
- The default sort is by create date (newest to oldest).

4. Collapse filters

- Click on this button to hide the filter options and allow for more data to display in results list.

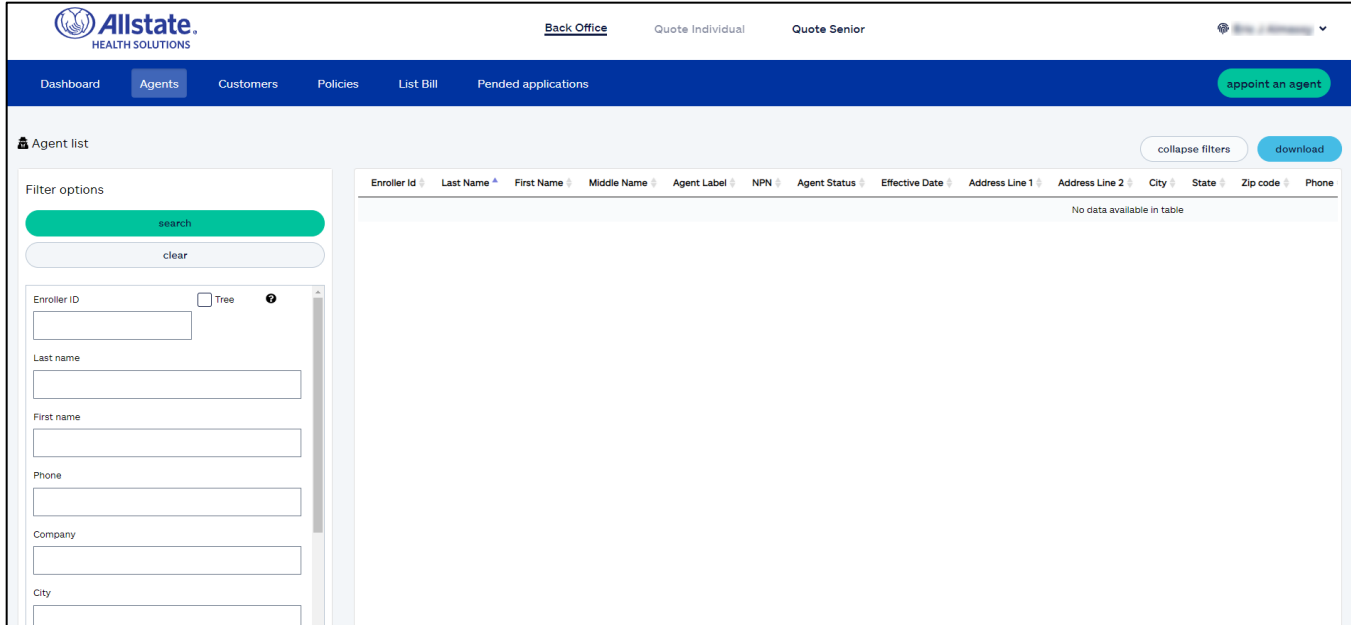
5. Download

Click on this button to download data in a .csv format.

- Download now – to export current results view.
- Download full details – to export ALL column options.

Agents

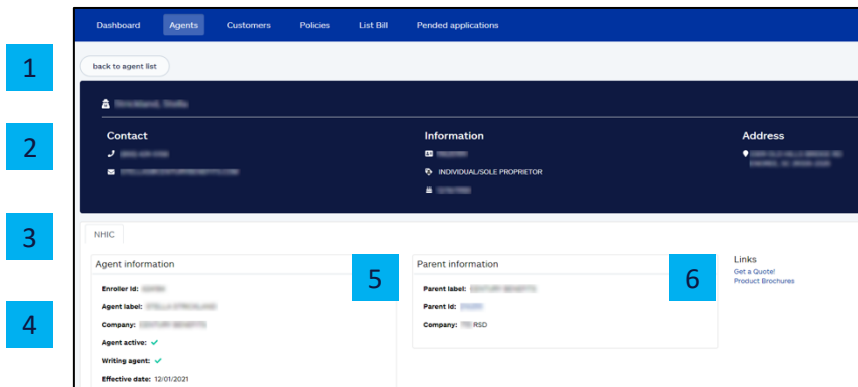
The **agent list** page allows you to search agents under your TIC and NHIC hierarchy simultaneously based on NPN. When you first navigate to this page, there are no results. Click **search** to see all your downline hierarchy agents OR enter filter option(s) to narrow your search.



The screenshot displays the 'Agent list' interface. On the left, there are 'Filter options' including a search bar, a clear button, and input fields for Enroller ID (with a 'Tree' checkbox), Last name, First name, Phone, Company, and City. The main area shows a table with columns: Enroller ID, Last Name, First Name, Middle Name, Agent Label, NPN, Agent Status, Effective Date, Address Line 1, Address Line 2, City, State, Zip code, and Phone. The table is currently empty, displaying 'No data available in table'. There are 'collapse filters' and 'download' buttons at the top right of the table area.

Some things to note with this section:

- **Enroller ID**
 - Must be an exact match.
 - Tree option – check to see downline hierarchy of Enroller ID entered.
- **Create Date Start**
 - Enter in a Create Date Start to bring back all agents effective on or after that date and later.
 - Can be used in conjunction with Create Date End to search by a date range.
- **Create Date End**
 - Enter in a Create Date End to bring back all agents effective through that date.
 - Can be used in conjunction with Create Date Start to search by a date range.
- **Select Agent Indicator(s)**
 - When two or more indicators are checked, they are being treated as 'and' conditions. The results list needs to meet all of the selected conditions.
- **Results List**
 - Click on any of the following to see the agent's profile:
 - Enroller ID.
 - Last name.
 - First name.



Agent details

Upon clicking the **Enroller ID** or **Name** in the results list, you will be navigated to the **agent details** page.

The agent details page consists of the following:

1. **Back to Agent List** – this link takes you back to the Agent List page.
2. **Agent demographics** – the section in blue gives you high-level agent information.
3. **Legal entity** – the agent details for each legal entity are included in each tab.
4. **Agent information** – agent details for that legal entity for the listed Enroller ID.
5. **Parent information** – this shows the parent agent that the listed Enroller ID is attached to. If there are different hierarchies for the different Legal Entities/Enroller IDs, the information under the parent section will only display if you are part of the hierarchy.
6. **Links**
 - a. **Get a quote!** – clicking on this link displays the Allstate Health Solutions page for initial Quotit Account registration or to sign into Quotit if they are already registered. This link will only display if the agent has an arrangement that indicates they are a writing agent.
 - b. **Product brochures** – clicking on this link navigates you to the agent website for product brochures.



7. **Agent hierarchy** – this is a tree view of the agent's downline hierarchy.
 - a. To expand the tree, click on the plus sign next to the Enroller ID.
 - b. If the plus sign is not there, that means there is no downline hierarchy to display.
 - c. Click **Export to CSV** to download the results in a .csv format.

8

Agent product authorization

export to CSV

Product Id	Products
21043	ACCIDENT FIXED-BENEFIT PLAN (NHIC-ASSOCIATION)
21044	ACCIDENT FIXED-BENEFIT PLAN (NHIC-INDIVIDUAL)
27873	ALLSTATE HEALTH ACCESS - ASSOCIATION
27874	ALLSTATE HEALTH ACCESS - GI - ASSOCIATION
27876	ALLSTATE HEALTH ACCESS - GI - INDIVIDUAL
27875	ALLSTATE HEALTH ACCESS - INDIVIDUAL
20231	CANCER & HEART/STROKE
21677	CRITICAL ILLNESS W/ TERM LIFE - INDIVIDUAL

Showing 1 to 10 of 50 entries

8. **Agent product authorization** – this is the list of products the listed Enroller ID is authorized for.
- Click **Export to CSV** to download the results in a .csv format.

9

Licenses

export to CSV

License#	License Residency	License Type	State	Effective Date	TerminationDate

Showing 1 to 10 of 36 entries

1 2 3 4

9. **Licenses** – this shows the licenses the agent holds, including the line of authority, state, effective date, and termination date, when applicable.
- Click **Export to CSV** to download the result in a .csv format.

10

Appointments

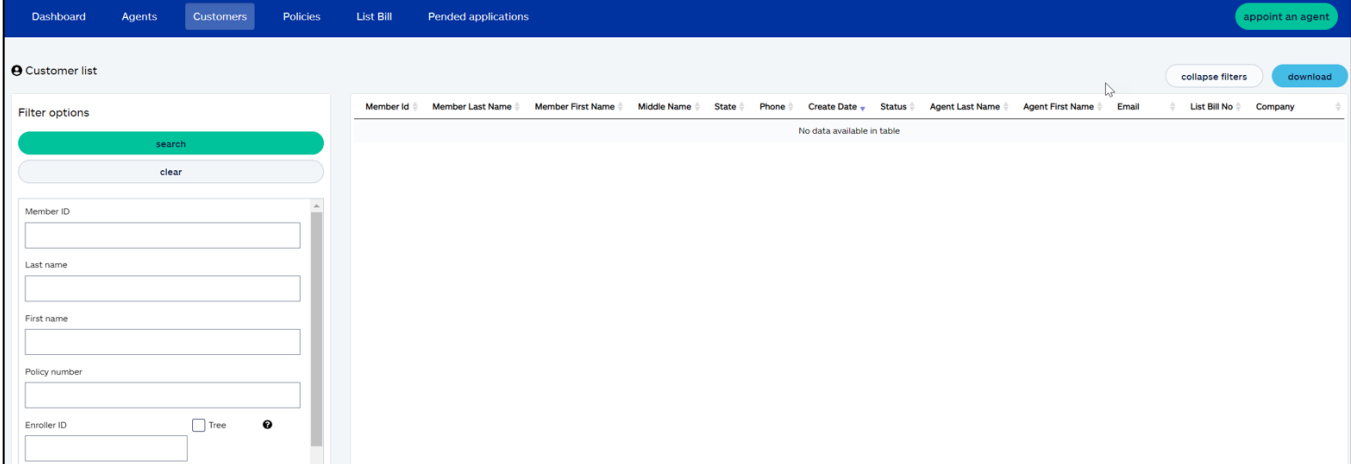
export to CSV

Legal Entity	State	Effective Date	TerminationDate

10. **Appointments** – this shows all the agent’s appointments, including the state, effective date, and termination date, when applicable.
- Click **Export to CSV** to download the results in a .csv format.

Customers

The **customer list** page displays your downline agents' customers. When you navigate to this page, there are no results. Click **search** to see all your downline hierarchy customers OR enter filter option(s) to narrow your search.

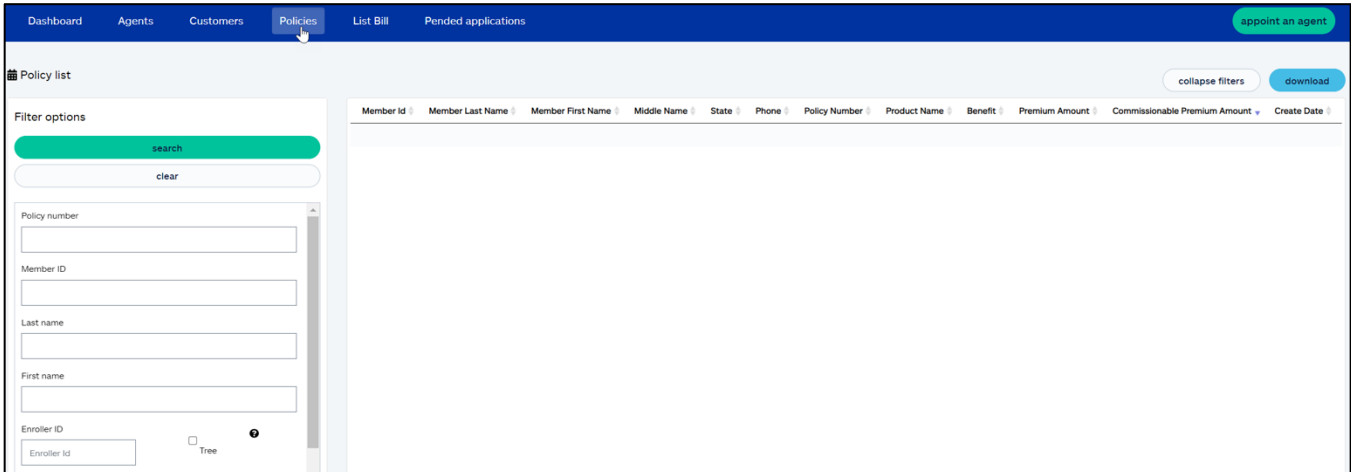


Some things to note with this section:

- **Member ID (also known as Customer ID)** – must be an exact match.
- **Policy number** - must be an exact match.
- **Enroller ID**
 - Must be an exact match.
 - Tree option – check to see customers for downline hierarchy of Enroller ID entered.
- **All customers will be shown for both TIC and NHIC sales as long as the NPN matches your agent profiles.**
 - Example: You have Enroller ID 12345 for TIC and 67890 for NHIC. You sold customer John STM and customer Jane Dental Indemnity. On both agent profiles, you have the same NPN. When you look at your customer list, both John and Jane will display.
- **List Bill No** - must be an exact match.
- **Phone number** – no specific formatting needed (i.e., do not include hyphens or parentheses).
- **Create Date Start**
 - Enter in a Create Date Start to bring back all customers created from that date and later.
 - Can be used in conjunction with Create Date End to search by a date range.
- **Create Date End**
 - Enter in a Create Date End to bring back all customers created through that date.
 - Can be used in conjunction with Create Date Start to search by a date range.
- **Status (select from dropdown)**
 - Active – record has at least one active policy and there are no policies on hold.
 - Inactive – record has at least one inactive policy and there are no policies on hold.
 - Incomplete – all policies on record are incomplete.
 - Hold – record has at least one policy in hold (meaning policy is active, in grace period).
- **Payment Past Due** – when checked, results list will include customers who have at least one policy with an overdue payment within the past 30 days.
- **Results List** – click on **Member ID** to see the policy details

Policies

The **policy list** page displays your downline agents' policies. When you first navigate to this page, there are no results. Click **search** to see all your downline hierarchy policies OR enter filter option(s) to narrow your search.

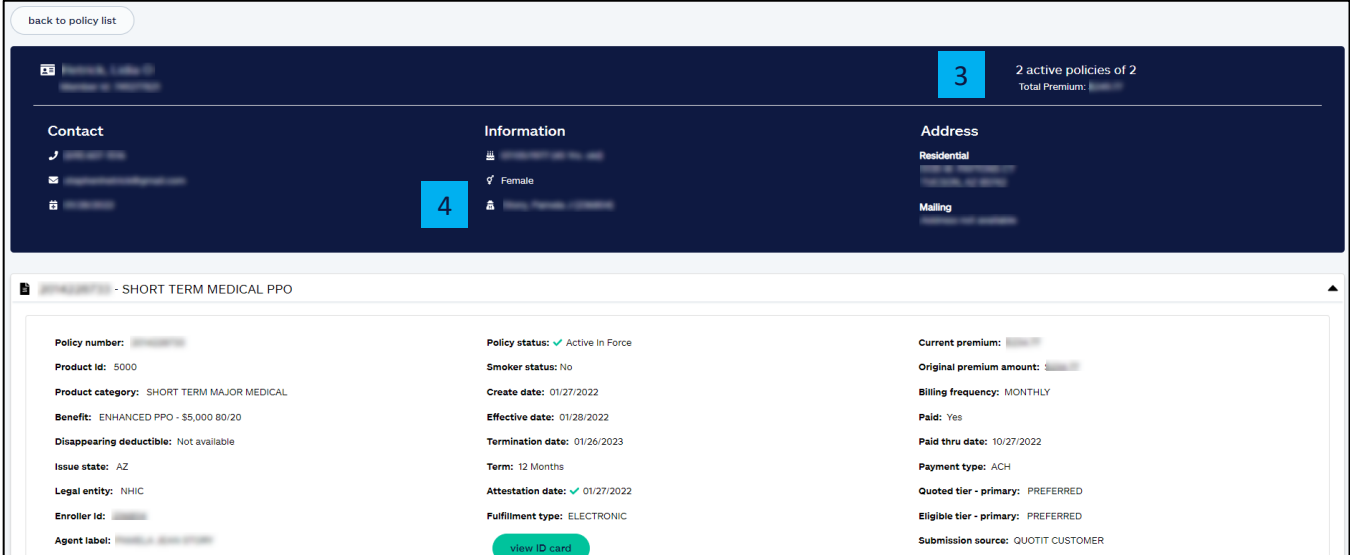


Some things to note with this section:

- **Policy number** - must be an exact match.
- **Member ID (also known as Customer ID)** – must be an exact match.
- **Last name** – partial or full name accepted.
- **First name** – partial or full name accepted.
- **Enroller ID**
 - Must be an exact match.
 - Tree option – check to see policies for downline hierarchy of Enroller ID entered.
- **All policies will be shown for both TIC and NHIC sales as long as the NPN matches on your agent profiles.**
 - Example: You have Enroller ID 12345 for TIC and 67890 for NHIC. You sold customer John STM and customer Jane Dental Indemnity. On both agent profiles, you have the same NPN. When you look at your policy list, both John and Jane will display.
- **List Bill No** - must be an exact match.
- **Results List** – click on Member ID to see the policy details.
- **Create Date Start**
 - Enter in a Create Date Start to bring back all policies created from that date and later.
 - Can be used in conjunction with Create Date End to search by a date range.
- **Create Date End**
 - Enter in a Create Date End to bring back all policies created through that date.
 - Can be used in conjunction with Create Date Start to search by a date range.
- **Status (at the policy level) (select from dropdown)**
 - Active – policy is active.
 - Inactive – policy is inactive (either canceled or terminated).
 - Incomplete – policy is incomplete (policy was never active).
 - Hold – policy is not paid and in grace period.
- **Policy End Days**
 - Select 'Next 30 days' to filter policies ending in the next 30 days.
 - Select 'Next 60 days' to filter policies ending in the next 60 days.

Policy details

Upon click of **Member ID** in the results list, you will be navigated to the **Policy Details** page. The policy details page is the same when coming from the customer list or policy list.



The screenshot shows the 'Policy Details' page for a 'SHORT TERM MEDICAL PPO' policy. The page is divided into several sections:

- 1**: A 'back to policy list' link at the top left.
- 2**: A 'Contact' section in blue, containing fields for name, email, and phone.
- 3**: A 'Policy snapshot' at the top right, showing '2 active policies of 2' and 'Total Premium: \$1,234.56'.
- 4**: An 'Information' section in the middle, including 'Smoker status: No', 'Create date: 01/27/2022', 'Effective date: 01/28/2022', 'Termination date: 01/26/2023', 'Term: 12 Months', 'Attestation date: 01/27/2022', and 'Fulfillment type: ELECTRONIC'.
- 5**: A 'Policy details' section at the bottom, listing 'Policy number', 'Product id: 5000', 'Product category: SHORT TERM MAJOR MEDICAL', 'Benefit: ENHANCED PPO - \$5,000 80/20', 'Disappearing deductible: Not available', 'Issue state: AZ', 'Legal entity: NHIC', 'Enroller id', and 'Agent label'. A 'view ID card' button is located at the bottom center of this section.

The policy details page consists of the following:

1. **Back to customer list / back to policy list** – this link takes you back to the customer list / policy list page
2. **Customer demographics** – the section in blue gives you high-level customer information.
3. **Policy snapshot** – this count shows the total number of policies and total premium for all policies on this record.
4. **Agent** – this identifies the agent that sold the policy. You can click on the agent’s name to go to the agent’s profile.
5. **Policy details** – click on the black down arrow to see the customer’s policies.
 - a. Click on each policy to see the policy details (e.g., policy number, effective date, billing info, etc.).
 - o Benefit - the “current Benefit” loads based on the date/policy term. If the plan changed, you will not see the former benefit.
 - b. View ID cards – click on this button to view/print ID card for that specific policy. Note: this button will only display for products that have an ID card.
 - c. Healthy Discount and/or STM Activity Tracker Credit – displays if applied to the policy.

6

Renewals

Sequence Number	Original Renewal Premium	Status	Effective Date	Termination Date
1	\$ [REDACTED]	Active - In force	01/28/2022	01/26/2023
2		Active - Renewal	01/27/2023	01/27/2024
3		Active - Renewal	01/28/2024	01/27/2025

Showing 1 to 3 of 3 entries

- 6. **Renewals grid** - applies to policies with renewal terms; not consecutive terms with different policy numbers.
- 7. **Original Renewal Premium** - amount printed on the renewal notification (48 or 63 days in advance of the renewal term's effective date).
 - a. If there are endorsements from the time of notification to the effective date of the policy term that impact the premium, the amount will not change.

8

Dependents					Beneficiary	
Name	Relationship	Date Of Birth	Age	Gender	Name	Relationship
No data available in table					No data available in table	

Showing 0 to 0 of 0 entries

- 8. **Dependents** – this section displays the dependents tied to this specific policy, if applicable.
- 9. **Beneficiary** – this section displays the beneficiaries for this specific policy, if applicable.

10

Transactions

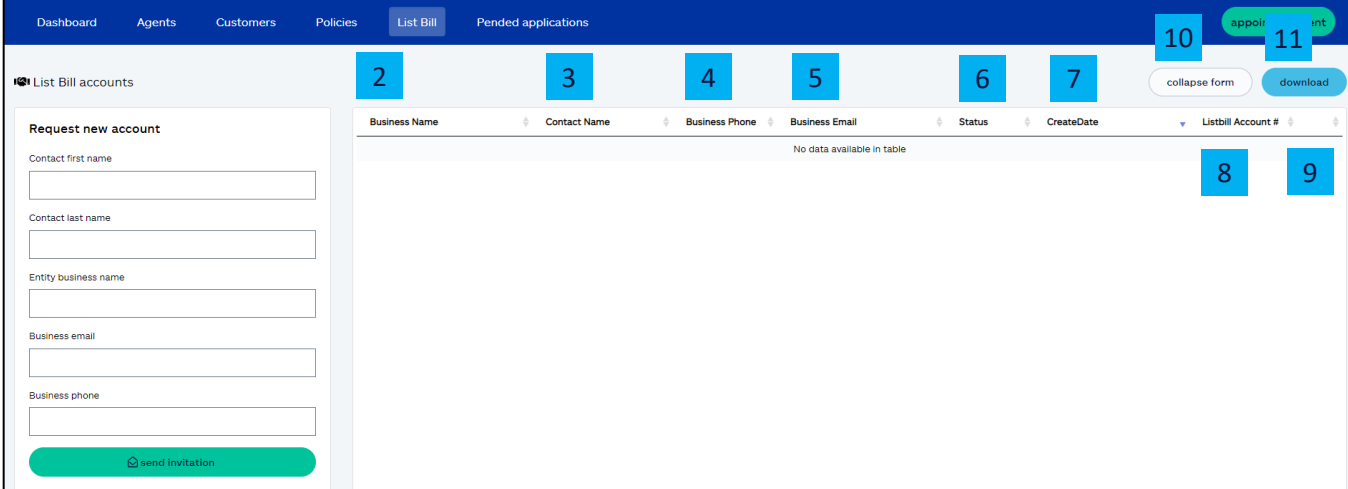
Transaction Date	Transaction Type	Payment Type	Total	Status	Account Name	Account No
[REDACTED]	Payment	ACH	[REDACTED]	Approved	[REDACTED]	[REDACTED]
[REDACTED]	Payment	ACH	[REDACTED]	Approved	[REDACTED]	[REDACTED]
[REDACTED]	Payment	ACH	[REDACTED]	Approved	[REDACTED]	[REDACTED]
[REDACTED]	Payment	ACH	[REDACTED]	Approved	[REDACTED]	[REDACTED]
[REDACTED]	Payment	ACH	[REDACTED]	Approved	[REDACTED]	[REDACTED]
[REDACTED]	Payment	ACH	[REDACTED]	Approved	[REDACTED]	[REDACTED]

Showing 1 to 24 of 24 entries

- 10. **Transactions** – this section displays the billing transactions and status.

List Bill

This page includes the ability to send an invite to the online List Bill application process, track the status of that invite and obtain the List Bill Group number, as soon as the group is approved.

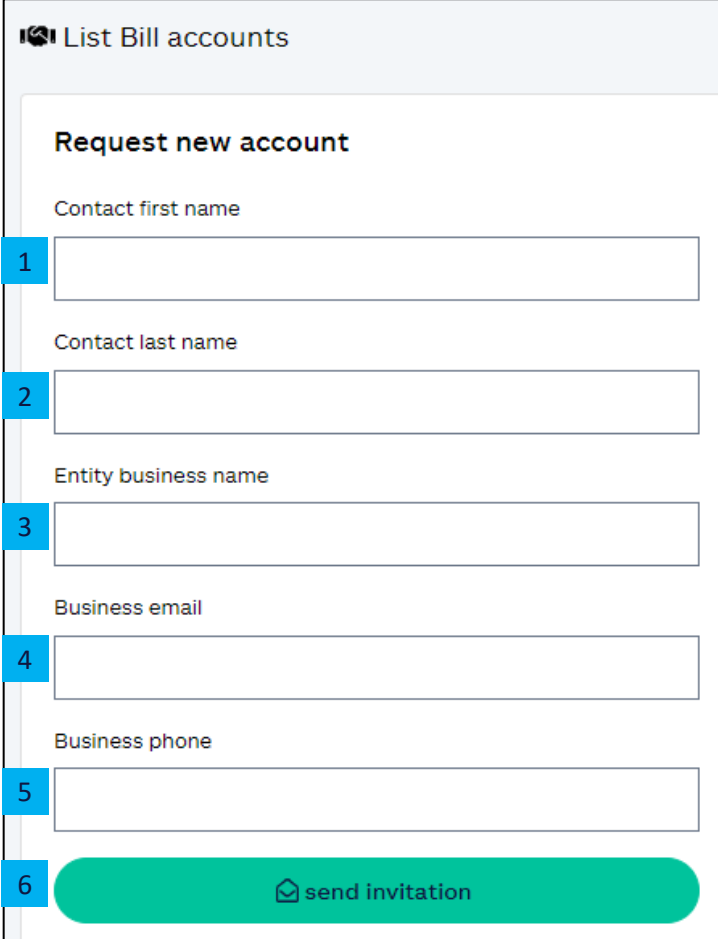


The **List Bill Accounts** page consists of the following:

1. **List Bill accounts** – prefills with your entire list of List Bill account requests. This list consists of existing and pending List Bill Accounts.
2. **Business name** – name of the business requesting the List Bill account.
3. **Contact name** – name of the business contact who will be completing the application for the List Bill account.
4. **Business phone** – phone number for the business contact person.
5. **Business email** – email used for all electronic correspondence regarding the List Bill account.
6. **Status** – provides the current status of all List Bill accounts requested by you.
 - a. **Invite sent** – an invitation to complete a List Bill account application was sent to the person named in the contact name field. It will remain in this status until the application is submitted to Allstate Health Solutions
 - b. **In-review** – the application for a List Bill account is being reviewed by Allstate Health Solutions for final decision/approval.
 - c. **Declined** – the application for a List Bill account was declined by Allstate Health Solutions.
 - d. **Approved** – the application for a List Bill account was approved by Allstate Health Solutions.
7. **Create date** – the date the invitation to apply for a List Bill account was sent to the business contact.
8. **List Bill account number** - this List Bill account number will display if approved. The agent and the group will also receive email confirmation.
9. **Envelope icon** – icon will display if status is 'Invite Sent'. When selected, this triggers the invite to resend to that prospective List Bill account holder.
10. **Collapse form** – click on this button to hide the 'Request New List Bill Account' section.
11. **Download** – click on this button to export current results view in .csv format.

Request new List Bill account

This page allows you to gather necessary information to generate an invitation to a client requesting a List Bill account. All fields are required.



The screenshot shows a web form titled "List Bill accounts" with a sub-section "Request new account". It contains five text input fields and a green button labeled "send invitation". Blue callout boxes with numbers 1 through 6 point to each field and the button respectively.

- 1. Contact first name
- 2. Contact last name
- 3. Entity business name
- 4. Business email
- 5. Business phone
- 6. send invitation

The **Request new List Bill account** section consists of the following:

1. **Contact first name** – first name of the business contact who will complete the application for the List Bill account.
2. **Last name** – last name of the business contact.
3. **Entity/business name** – name of the business associated with the List Bill account.
4. **Business email** – email associated with the business contact.
5. **Business phone** – business contact phone number.
Note: If List Bill account holder makes updates to fields 1- 5 during the application process, they will update in ABO. Once the List Bill Application is submitted, no further updates can be made to these fields.
6. **Send invitation** – click on this button to submit the invitation to apply for a List Bill account to the email provided.

Successful submission of the List Bill account invitation

The screenshot displays a web application interface for managing List Bill accounts. At the top, there is a navigation bar with tabs for Dashboard, Agents, Customers, Policies, List Bill, and Pended applications. A green button labeled 'appoint an agent' is located in the top right corner. Below the navigation bar, the 'List Bill accounts' section is visible, featuring a 'collapse form' button and a 'download' button. On the left side, there is a 'Request new account' form with fields for Contact first name (Test), Contact last name (ListBill), Entity business name (TestTest), Business email (Test@test.com), and Business phone ((414) 999-9999). A green button labeled 'send invitation' is positioned below the form. A blue arrow points from this button to a success message box on the right. The success message box contains the text: 'List Bill application request sent successfully! Click here to see application status.' In the background, a table of List Bill accounts is visible, with columns for Business Name, Contact Name, Business Phone, Business Email, Status, CreateDate, and Listbill Account #.

List Bill application request sent successfully!
Click here to see application status.

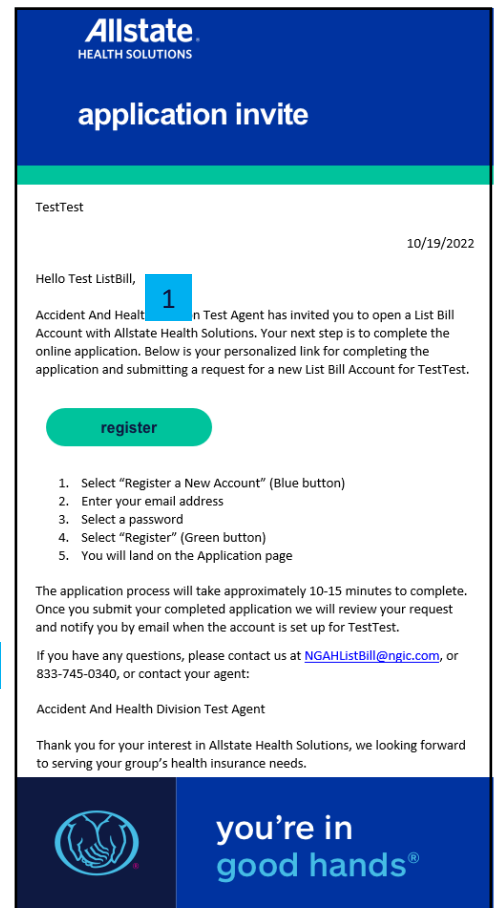
Upon clicking **Send Invitation** button, a List Bill application request sent successfully message will display. This indicates a successful submission of the invitation. If required fields are missing, an error message will display with resolution instructions.

Client next steps in List Bill application

Email generation

Following the successful submission of the List Bill account invitation, an email will be sent to the business email provided.

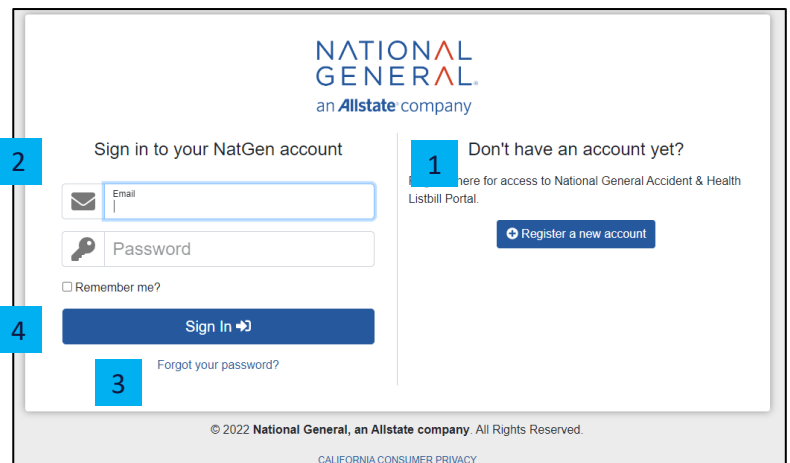
1. **Salutation** – the name of the business contact provided in the invitation.
2. **Register** – application link, specific to the business provided.
3. **Contact information** – Allstate Health Solutions contact information for questions.



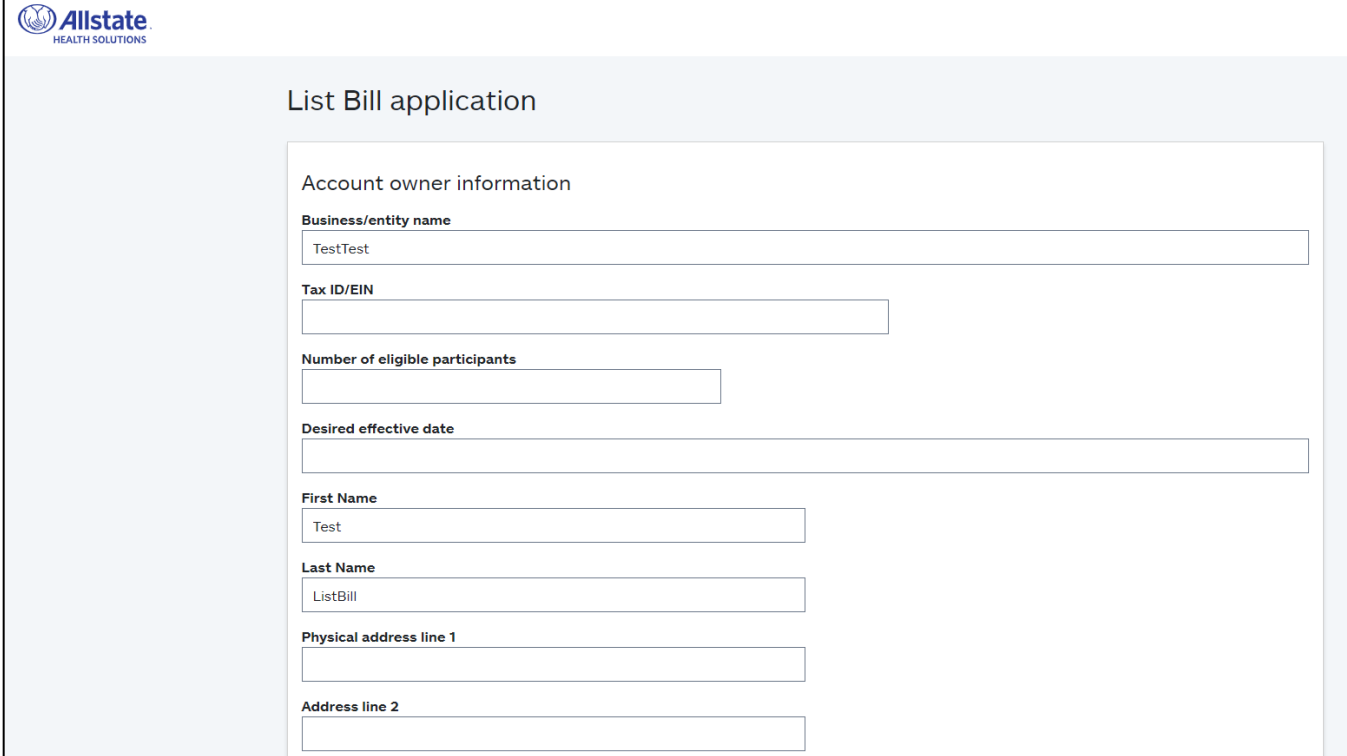
Registration

Upon clicking the **Register** button, the applicant will be directed to the registration page where they create an Allstate Health Solutions account and gain access to the online application.

1. **Don't have an account yet?** – first time user registration.
2. **Sign in to your Allstate Health Solutions account** – existing users fill in email and password.
3. **Forgot your password?** – link to reset password.
4. **Sign in** – confirms sign in credentials for existing users and directs them to the application.



Sample List Bill application



The screenshot shows a web form titled "List Bill application" with the Allstate Health Solutions logo in the top left corner. The form is titled "List Bill application" and contains the following fields:

- Account owner information**
 - Business/entity name**: Text input field containing "TestTest".
 - Tax ID/EIN**: Text input field.
 - Number of eligible participants**: Text input field.
 - Desired effective date**: Text input field.
- First Name**: Text input field containing "Test".
- Last Name**: Text input field containing "ListBill".
- Physical address line 1**: Text input field.
- Address line 2**: Text input field.

Once the List Bill account holder completes and submits the application, the List Bill group remains in the List Bill accounts page of ABO with a status of **in review**.

Once approved, the status will change to **approved** and a List Bill number will display.

List Bill Q&A

List Bill account – commonly asked questions

Q. Who is eligible for a List Bill account?

A. List Bill is available to employer and non-employer groups with two or more members. Group eligibility will be reviewed upon submission of the completed List Bill account application.

Q. How does someone set up a List Bill account?

A. Interested applicants are sent an email invitation from their agent that includes a personalized link they can use to access the List Bill account application.

Q. Where do List Bill account owners access the List Bill account information?

A. Once the group has an active List Bill Account, List Bill owners can access their account information at www.listbill.mynatgen.com. They will need to enter the username and password they created when they set up their List Bill Account.

Q. How do members enroll for coverage under a List Bill account?

A. When enrolling List Bill clients, your agent needs to select the List Bill button in the shopping cart before selecting **enroll now**.

Q. What are the available effective dates for policies under a List Bill account?

A. List Bill policies must begin the first day of the month.

Q. Are there any product limitations for List Bill account members?

A. Yes.

- Allstate Health Solutions Short Term Medical plans are not available with the List Bill option. Short Term Medical plans are available with our standard individual billing options.
- Non-Allstate Health Solutions products are not available with the List Bill option.
- There are also some state specific restrictions:
 - In Arkansas, List Bill is not available for the following products: TrioMed, Plan Enhancer, Cancer Heart Stroke, Hospital Expense Protection, or Foundation Health Enhanced.
 - In Massachusetts, Utah and Wyoming, List Bill is not available with Foundation Health Enhanced.

Q. What type of payment methods can be used to pay for List Bill accounts?

A. The following payment options are accepted:

- Bank account – checking or savings.
- Credit card – Visa, MasterCard, Discover or American Express.

Q. What is the billing schedule for List Bill accounts?

A. List Bill accounts are billed on a monthly basis.

- List Bill account owners receive an email notification when their monthly invoice is ready for viewing in the List Bill account portal. The subject line will read “Your invoice is ready”.
- List Bill account owners receive a preliminary invoice on the 10th of each month, or the prior business day if the 10th is not a business day.
- List Bill account owners will receive a final invoice notification and payments will be drafted on the 15th of each month, or the next available business day if the 15th is not a business day.

- List Bill account owners can request updates to their List Bill invoices after they receive the preliminary invoice as long as it is before the draft date. Changes can be requested by email to NGAHLlistBill@ngic.com, or by calling 833-745-0340. Changes will be reflected on the next generated invoice.
- If an invoice change request is received after the final invoice notification and payment draft, an adjustment will be made on the following invoice cycle.

Q. What happens if a monthly ACH (or credit card) payment fails?

A. If the monthly ACH draft fails, the Allstate Health Solutions List Bill team will reach out to the List Bill owner to reconcile the payment due. If the payment is not received in a timely manner and policies are at risk of cancellation, the List Bill account members will be notified via email from us, of the upcoming policy lapse.

If the policy lapse notices are emailed to members, your List Bill Account members will have the opportunity to move to a direct payment method or choose to let their coverage terminate for reasons of non-payment by the List Bill account owner.

Q. What happens if a List Bill account member no longer is employed by their List Bill group?

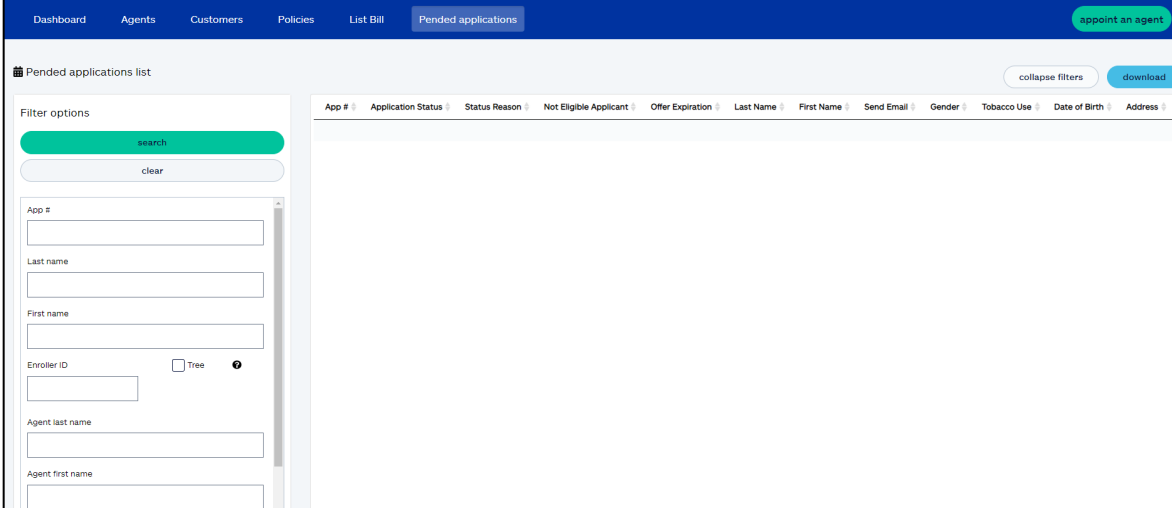
A. Members are provided an option to keep their coverage. If they choose to keep their coverage, they must contact us with new payment information.

Q. Who do List Bill account owners contact if they have questions relating to a List Bill account?

A. List Bill Account owners should contact the Allstate Health Solutions List Bill department at 833-745-0340, or email to NGAHLlistBill@ngic.com. A List Bill service team member will respond within 48 hours. Inquiries are responded to in the order in which they are received.

Pended applications

The pended applications page displays applications that are pending. When you first navigate to this page, there are no results. Click **Apply** to see all your downline hierarchy's pended applications, or enter filter options to narrow your search.

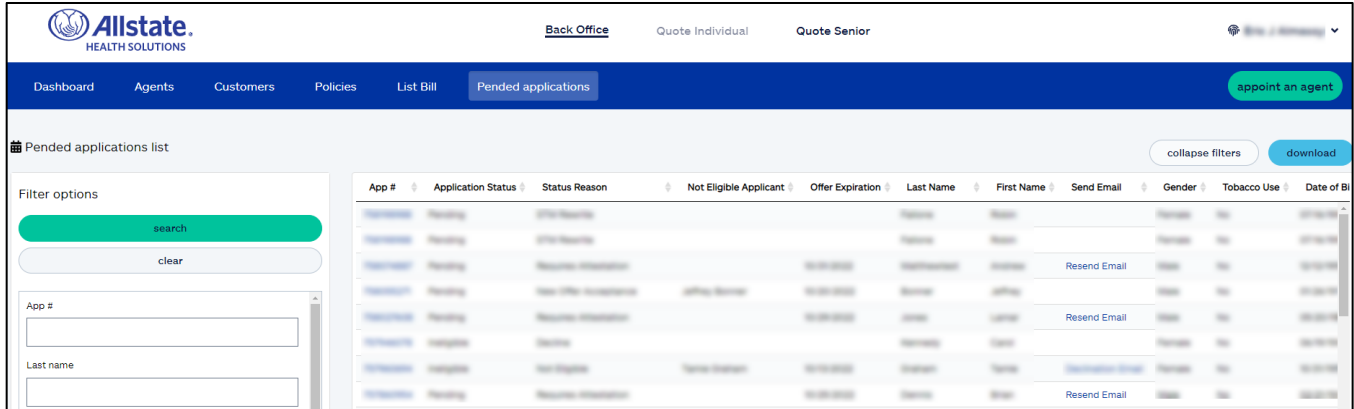


Some things to note with this section:

- **Application number** – must be an exact match.
- **Enroller ID**
 - Must be an exact match.
 - Tree option – check to see pended applications for downline hierarchy of Enroller ID entered.
- **All policies will be shown for both TIC and NHIC sales as long as the NPN matches on your agent profiles.**
 - Example: You have Enroller ID 12345 for TIC and 67890 for NHIC. You sold customer John STM and customer Jane Dental Indemnity. On both agent profiles, you have the same NPN. When you look at your policy list, both John and Jane will display.
- **Create Date Start**
 - Enter in a Create Date Start to bring back all pended applications created from that date and later.
 - Can be used in conjunction with Create Date End to search by a date range.
- **Create Date End**
 - Enter in a Create Date End to bring back all pended applications created through that date.
 - Can be used in conjunction with Create Date Start to search by a date range.
- **Status (select from dropdown)**
 - Pending – application is pending due to open referrals.
 - Expired – the offer period has expired. Application is canceled.
 - Ineligible – applicant not eligible for coverage. Application is canceled.
 - Incomplete – application has been marked incomplete.
- **Status Reason (select from dropdown)**
 - Requires Attestation
 - Pending Eligibility
 - Not Eligible
 - Requires Acceptance
 - New Offer Acceptance
 - STM Offer Acceptance

Resend email

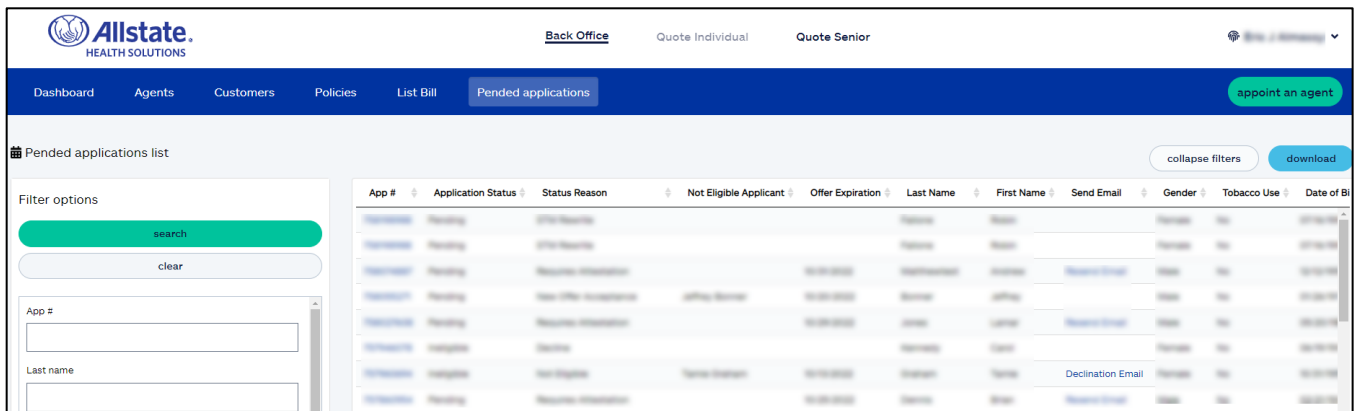
- Status reason of **Requires Attestation** includes a **Resend Email** link to complete the attestation in the member portal.



The screenshot shows the 'Pended applications' page in the Allstate Back Office. The table lists applications with columns for App #, Application Status, Status Reason, Not Eligible Applicant, Offer Expiration, Last Name, First Name, Send Email, Gender, Tobacco Use, and Date of Birth. Several rows show a 'Requires Attestation' status reason, and each of these rows has a 'Resend Email' link in the 'Send Email' column.

App #	Application Status	Status Reason	Not Eligible Applicant	Offer Expiration	Last Name	First Name	Send Email	Gender	Tobacco Use	Date of Bi
1234567	Pending	Requires Attestation		12/31/2023	John	Smith	Resend Email	Male	No	12/12/1980
1234568	Pending	Requires Attestation		12/31/2023	John	Smith	Resend Email	Male	No	12/12/1980
1234569	Pending	Requires Attestation		12/31/2023	John	Smith	Resend Email	Male	No	12/12/1980
1234570	Pending	Requires Attestation	John Smith	12/31/2023	John	Smith	Resend Email	Male	No	12/12/1980
1234571	Pending	Requires Attestation		12/31/2023	John	Smith	Resend Email	Male	No	12/12/1980
1234572	Complete	Decline		12/31/2023	John	Smith		Male	No	12/12/1980
1234573	Complete	Not Eligible	John Smith	12/31/2023	John	Smith	Declination Email	Male	No	12/12/1980
1234574	Pending	Requires Attestation		12/31/2023	John	Smith	Resend Email	Male	No	12/12/1980

- Status reason of **Not Eligible** includes a **Declination Email** link to resend the declination email.



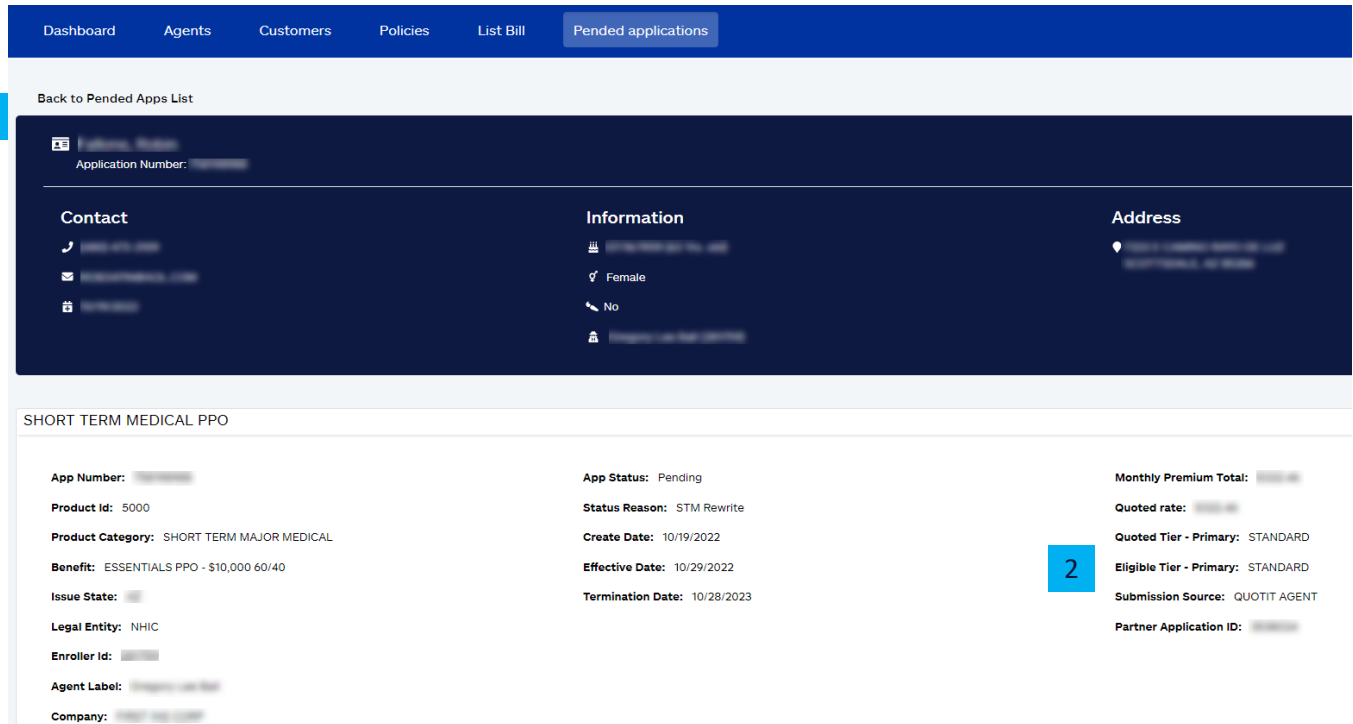
The screenshot shows the 'Pended applications' page in the Allstate Back Office. The table lists applications with columns for App #, Application Status, Status Reason, Not Eligible Applicant, Offer Expiration, Last Name, First Name, Send Email, Gender, Tobacco Use, and Date of Birth. One row shows a 'Not Eligible' status reason, and this row has a 'Declination Email' link in the 'Send Email' column.

App #	Application Status	Status Reason	Not Eligible Applicant	Offer Expiration	Last Name	First Name	Send Email	Gender	Tobacco Use	Date of Bi
1234567	Pending	Requires Attestation		12/31/2023	John	Smith	Resend Email	Male	No	12/12/1980
1234568	Pending	Requires Attestation		12/31/2023	John	Smith	Resend Email	Male	No	12/12/1980
1234569	Pending	Requires Attestation		12/31/2023	John	Smith	Resend Email	Male	No	12/12/1980
1234570	Pending	Requires Attestation	John Smith	12/31/2023	John	Smith	Resend Email	Male	No	12/12/1980
1234571	Complete	Decline		12/31/2023	John	Smith		Male	No	12/12/1980
1234572	Complete	Not Eligible	John Smith	12/31/2023	John	Smith	Declination Email	Male	No	12/12/1980
1234573	Pending	Requires Attestation		12/31/2023	John	Smith	Resend Email	Male	No	12/12/1980

- **Results list** – click on application number to see the application details.

Pended application details

When you click on the application number link in the results list, you will be navigated to the pended application details page.



Dashboard Agents Customers Policies List Bill **Pended applications**

Back to Pended Apps List

Application Number: [REDACTED]

Contact

Information

Address

SHORT TERM MEDICAL PPO

App Number: [REDACTED] App Status: Pending Monthly Premium Total: [REDACTED]

Product Id: 5000 Status Reason: STM Rewrite Quoted rate: [REDACTED]

Product Category: SHORT TERM MAJOR MEDICAL Create Date: 10/19/2022 Quoted Tier - Primary: STANDARD

Benefit: ESSENTIALS PPO - \$10,000 60/40 Effective Date: 10/29/2022 Eligible Tier - Primary: STANDARD

Issue State: [REDACTED] Termination Date: 10/28/2023 Submission Source: QUOTIT AGENT

Legal Entity: NHIC Partner Application ID: [REDACTED]

Enroller Id: [REDACTED]

Agent Label: [REDACTED]

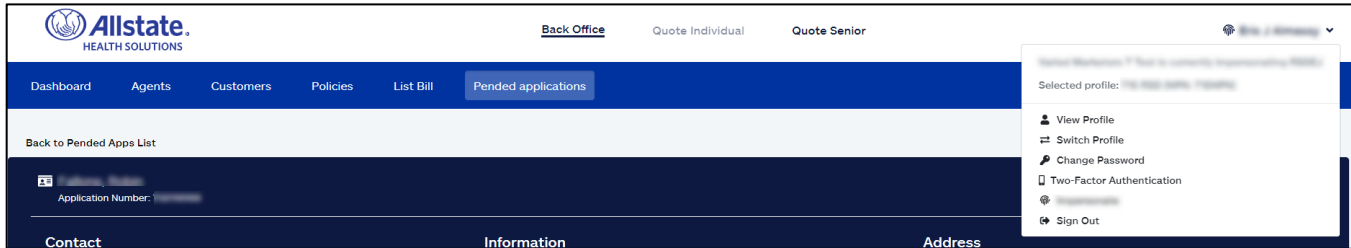
Company: [REDACTED]

In addition to the high-level customer/policy details, the pended application details page includes the following:

1. **Back to Pended apps list** – this link takes you back to the pended applications list page.
2. **Preferred status** (only applies to Short Term Medical applications)
 - a. Quoted rate
 - b. Eligible tier

Sign out

Please be sure to sign out after you are finished.



General information

- If you experience problems trying to access ABO, try CTRL + F5 to clear the cache. The process to clear the cache may also remove your **Remember Me** sign in, so this will need to be re-selected if it has been cleared.
- Data is updated periodically throughout the day.
- Agents need an active arrangement in order to access ABO.
- Customer list count vs policy list count:
 - The number of customers should be less than or equal to the number of policies because customers often buy more than one policy.
- ABO times out after 30 minutes of inactivity.
- Online lists scroll horizontally to accommodate additional columns.
- Online lists can be sorted on any column by clicking on the column name/heading.
 - Default sort is Create Date (newest to oldest).
 - Click on a column header to change the sort of that column.
 - The arrow indicates the direction of the sort (ascending or descending).
- If tab text or text within a tab is black, information is active. If tab text or text within a tab is red, information is inactive.