



online enrollment and quoting guide

It's easy to generate quotes and update employee information online. And we're always here to help if you need us.

If you have questions:

- For enrollment questions, e-mail us at group_assistants@ameritas.com
- For quoting questions, e-mail us at agentservices@ameritas.com
- Or call our Service Center at 855-517-5307 and select the appropriate option

Online Quoting

Benefits of Online Quoting

- Available for certain takeover cases, as well as all non-takeover groups
- 24 hours a day/7 days a week
- Easy to make plan modifications
- See premium adjustments in real time
- Generate a PDF that you can save and/or email direct from your computer
- Previous online quotes are stored for easy accessibility

Here's how...

Go to ameritasgroup.com/edge, under Brokers tab, click on **Quotes Log in**. Enter your agent number and password and select **Log in**.

Create a Quote

- Click **Prepare Online Quote** under the Quotes tab.
- Enter group information and click **Next**.
- Enter desired plan options, i.e. Dental/Vision/Both.
- Enter type of plan, i.e. Voluntary/Employer Paid. If Employer Paid, enter applicable percentage option. click **Next**.
- Select plan(s) and click **Next**.
- Modify plan benefits if desired. Premium amounts are updated as various options are selected. Click **Next**.

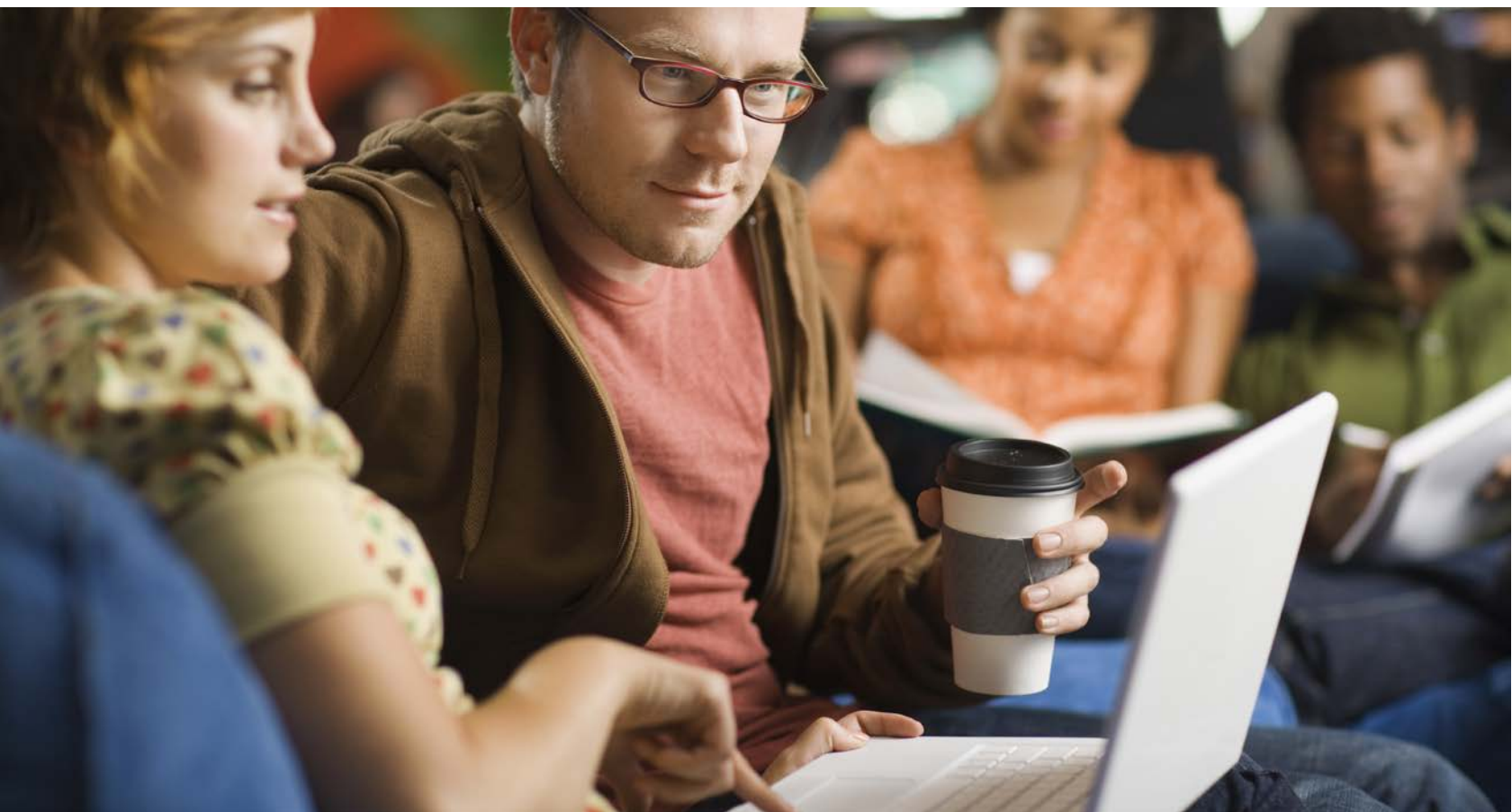
Print, Email and Save Quotes

After creating a quote, you will be given options on a summary page:

- **Save/Review** creates a secure PDF that can be printed, saved, and/or emailed.
- **Display my Quote with weekly rates**.
- **Back** button allows you to return to any step in the quoting process.
- **Email Quote** when I click Save allows you to add multiple email addresses as needed.

Manage Online Quotes

- You have the option to review a secure list of your previously created quotes via **Manage** located under the **Quotes** tab at the top of the page. Quotes are stored for 60 days from the effective date of the quote.
- Also available under the Quotes tab are links to **Request a Quote**, and a PDF version of this online quote guide.



New User Set Up

The online portal is a secure site. First-time users will need to create a password by clicking on **Set Up New Account**. You will need your agent number. If you don't know it or don't have one, contact Licensing at 855-517-5307, option 5. Fill in the requested information and click on **Submit**. Note that you will need to use this password each time you login to the portal.

Broker Tools

- Secure Account File Exchange
- Online Enrollment
- View Your Commission Statements
- Request a Quote Online
- Online Broker Statements
- Online Quote System
- Manage My Online Quote
- Update Personal Information
- Edit Login Information

Online Enrollment

Here's how...

Go to ameritasgroup.com/edge, select the Brokers tab and click on **Enrollment Log in**. Enter your agent number and password and select **Log in**.

New Groups

- Select **Begin New Enrollment Process**.
- You will be asked a series of questions based on what you sold. Once you complete all questions, view the **Acknowledgement and Disclaimer**, and click **Submit**. A group number will automatically be assigned.
- **The Master Application(s)** and/or **New Business Transmittal** will auto-fill with the information you provided. Please feel free to email the form(s) to your client, or print a copy for your records.
- When you are ready to continue, simply click on **Enroll employees for Group Number** and complete an **Enrollment Form** for each employee enrolling.

Additions

- Select **Enroll Additional Employees for an Existing Group**.
- Select the group from the list of your current groups, which are in order by **Account Name and Billing ID #**.
- Complete an enrollment form for each employee enrolling.

Changes

- Select **Submit a Change Request Card**.
- Complete the online **Dental/Vision Change Card**.
- After each change is submitted, you will receive immediate confirmation.

Brokers Tutorials Supply

Enrollment Request Broker Information

Please select one of the following:

[Search New Business](#)

Begin new enrollment process.

Enroll additional employees for an existing group.

Submit a Change Request Card

Submit

Enrollment Details

- New hires are eligible for coverage the first day of the month following the group's waiting period.
- Existing employees are eligible for full benefits if enrolling for coverage during the group's open enrollment period.
- Add dependents during the open enrollment period, or within 30 days of a qualifying event.





This information is provided by Ameritas Life Insurance Corp. [Ameritas Life]. Group dental, vision and hearing care products [9000 Rev. 03-08, dates may vary by state] and individual dental and vision products [Indiv. 9000 Ed. 11-09] are issued by Ameritas Life. Some plan designs are not available in all areas. In Texas, our PPO network and plans are referred to as the Ameritas Dental Network. Some states require that producers be appointed with Ameritas Life before soliciting its products. To become appointed with Ameritas Life, please call 800-659-2223. Most plans for groups with 26 or more enrolled lives are administered by Ameritas Life. Billing and eligibility for most plans with 25 or fewer enrolled lives are provided by HealthPlan Services, Inc.

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