Agent User Guide

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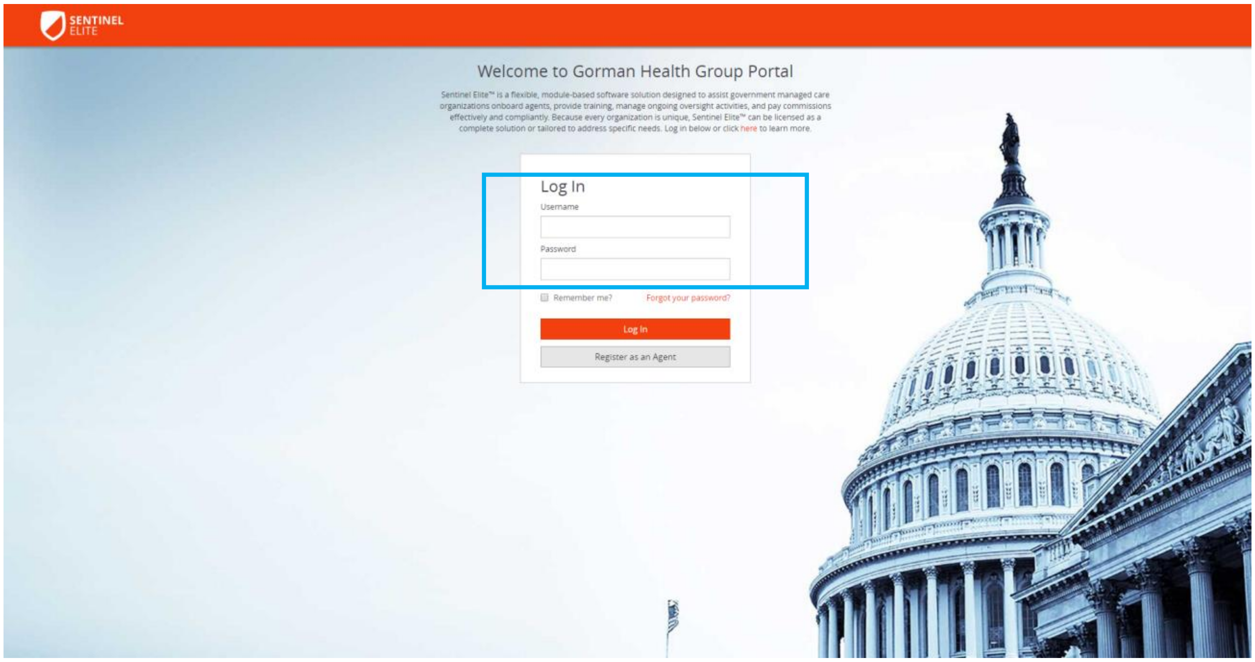
SENTINEL ELITE™

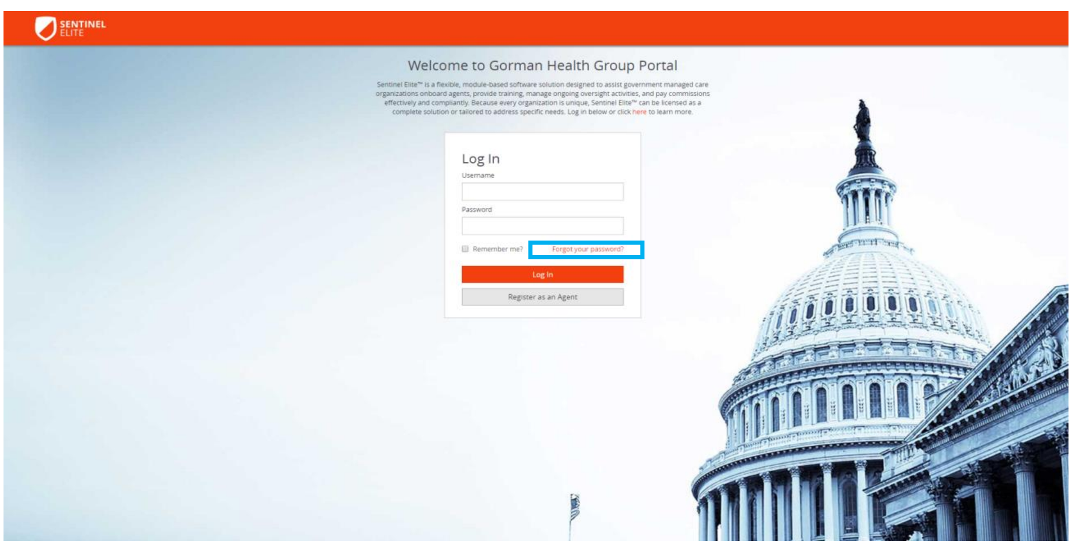
LOGGING IN

Sentinel Elite™ is accessible at www.sentinelelite.com. To login enter your username and password and then click ***Log In***.

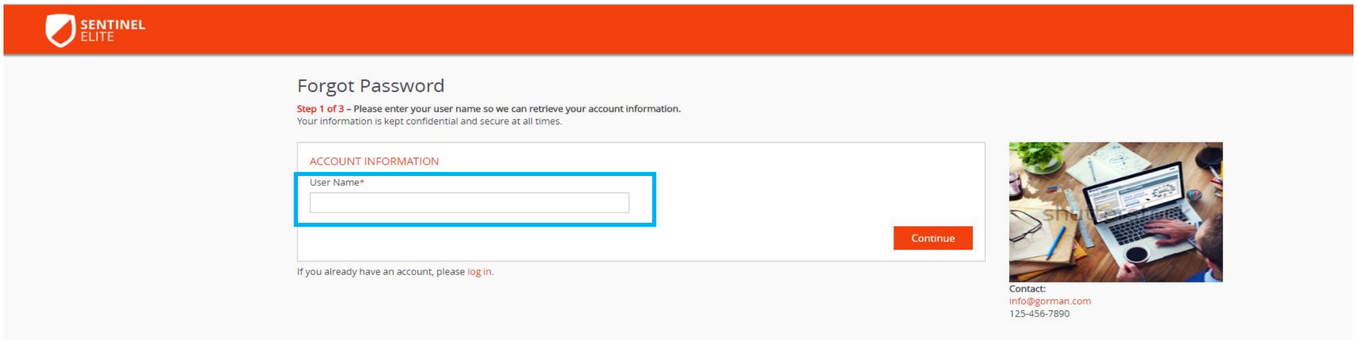


PASSWORD RESET

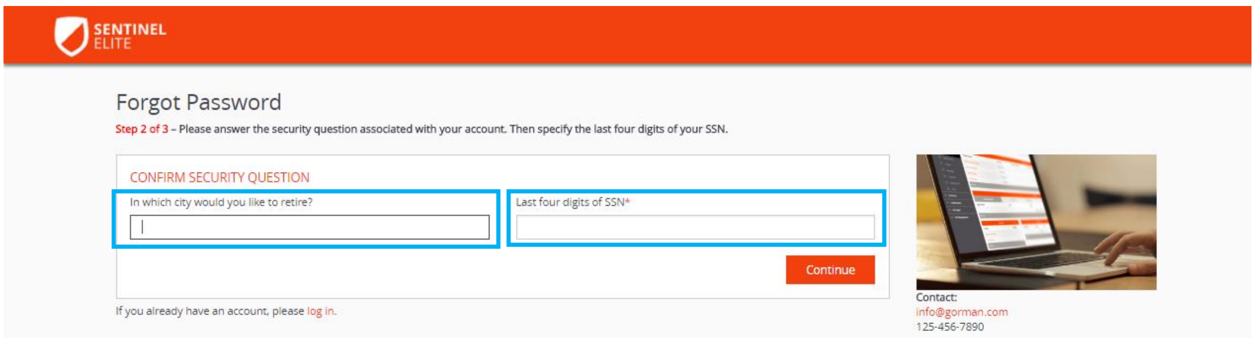
If you have forgotten your password click ***Forgot your password?*** on the landing page.



Enter your User Name when prompted and click ***Continue***.

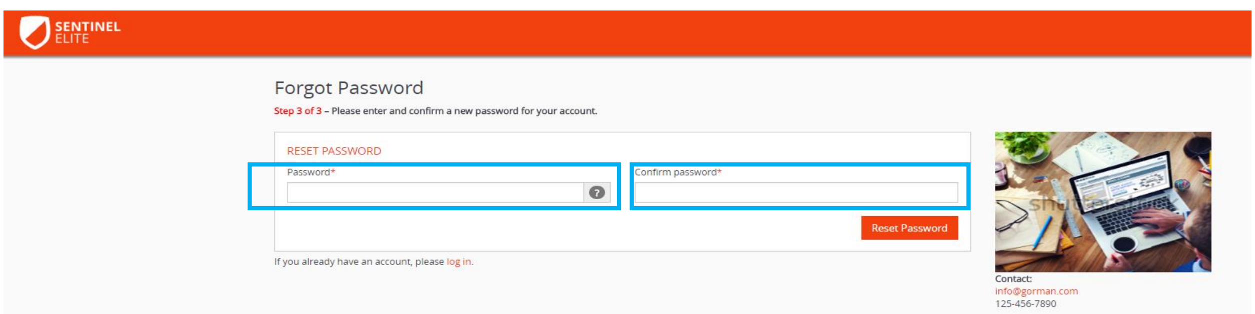


Next confirm the answer to your self-selected **Security Question** along with the **Last Four Digits of your Social Security Number** and click ***Continue***.



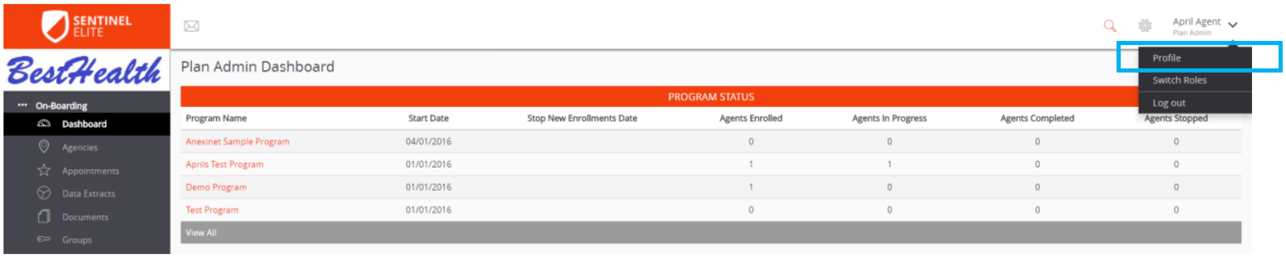
Enter a new password and confirm by reentering.

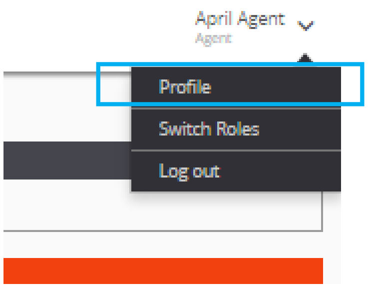
Tip: Password requirements in Sentinel Elite™ include at least 8 characters, including at least one uppercase letter, a lower case letter, a number and a non-alphanumeric character (#$!). Example: Password1#



PROFILE MANAGEMENT

To manage your profile including your demographic information and security details, place the cursor on your name in the upper right hand corner of the screen and select ***Profile*** from the drop down menu.





The information housed on your Profile Screen includes;

Demographic Information

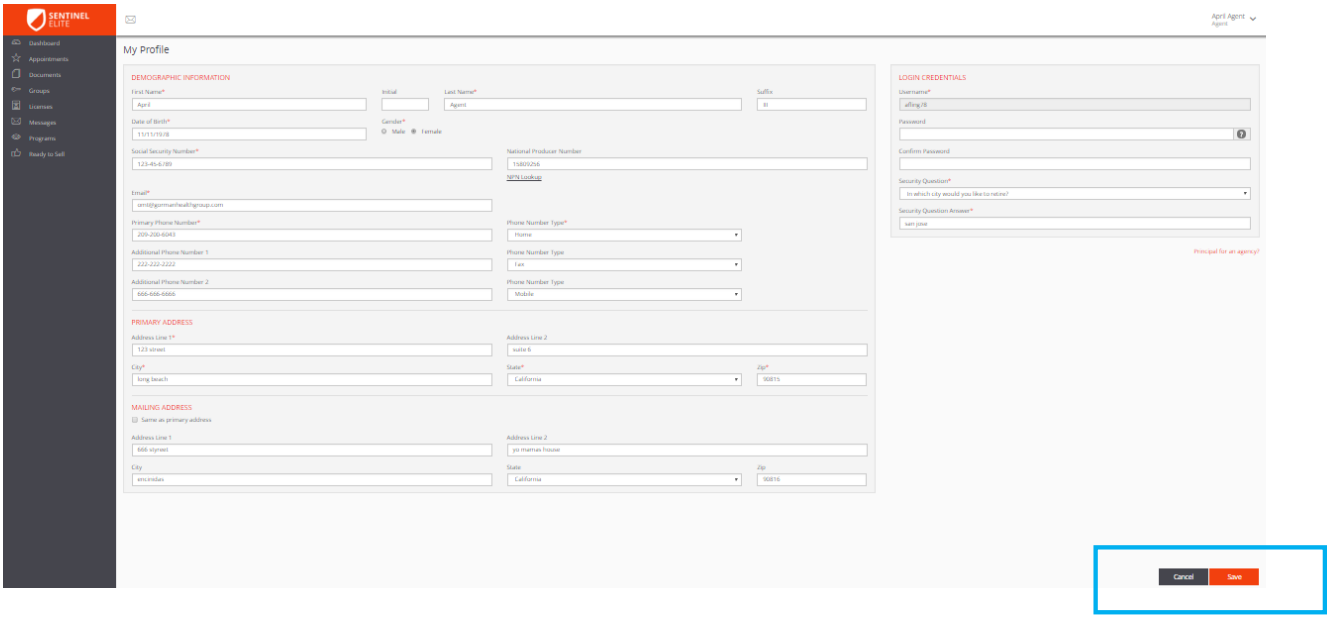
- Name
- Date of Birth
- Gender
- Social Security Number
- National Producer Number
- Email
- Telephone Numbers
- Addresses

Credentials

- Username
- Password
- Security Questions
- Security Answers

Principal Details (where applicable)

- Name of Agency for which you are the Principal

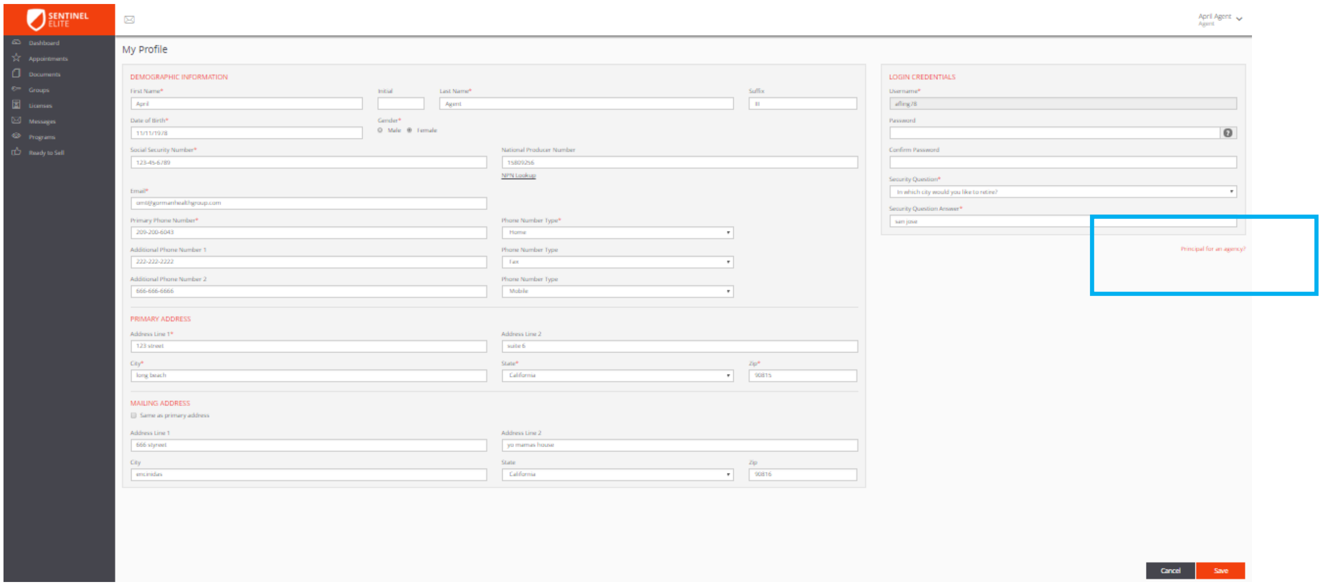


You may update the information contained on your ***My Profile*** screen. Once updated, click Save, to cancel click Cancel.

Tip: Required fields are identified with an asterisk * throughout Sentinel Elite™.

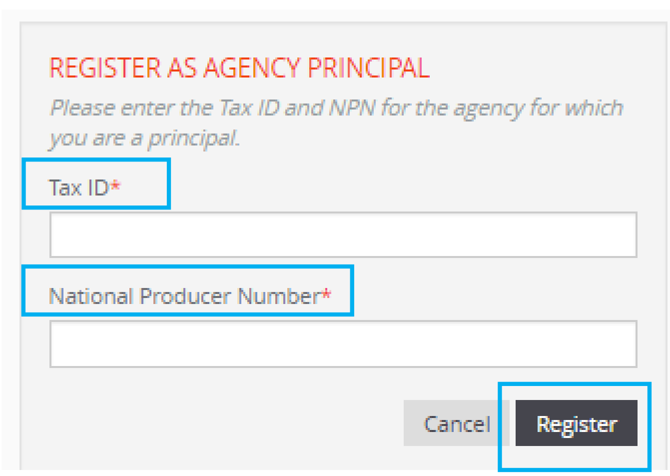
Tip: For security purposes your Social Security Number may not be used as your Username.

If you are the ***Principal of an agency*** you must register as an individual before you will be allowed to register as the Principal of an agency. Once your individual profile is set up, proceed to the Profile screen and click ***Principal for an agency?*** on the right of the screen below Login Credentials.



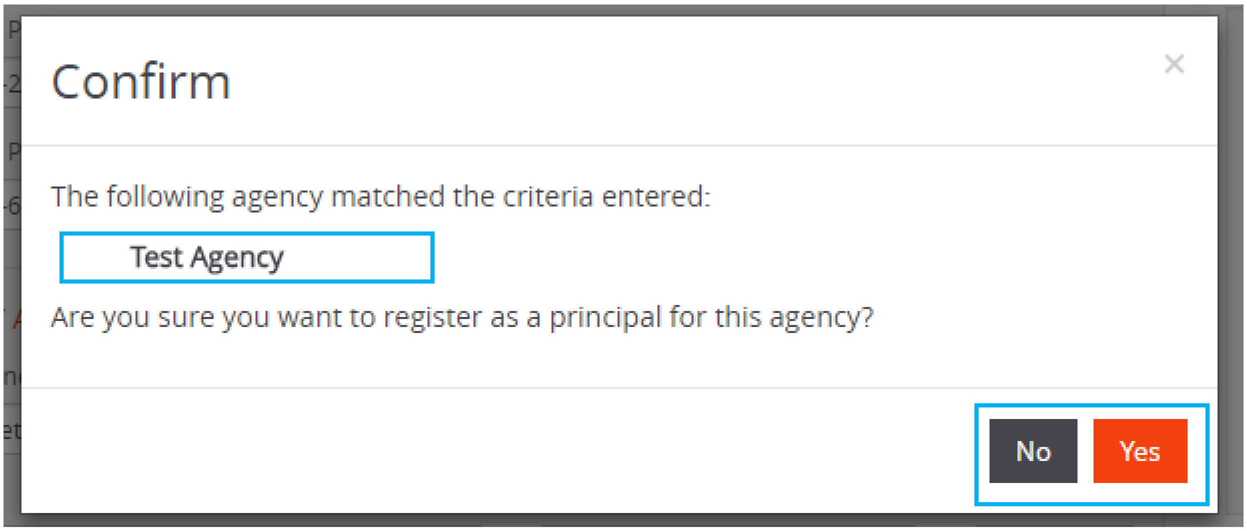
You will be prompted to input the ***Tax ID (FEIN)*** and ***National Producer Number*** <u>for the agency</u>.

To continue registering as the Principal of an agency click ***Register***. To cancel, click Cancel.

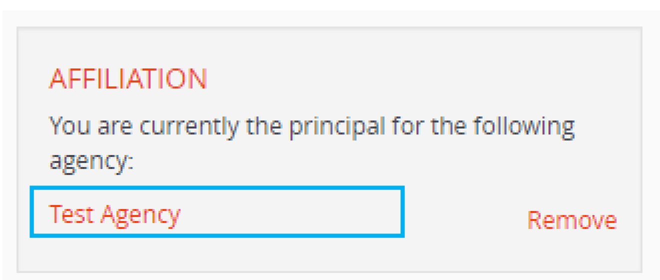


You will then be prompted to confirm that you'd like to register as the ***Principal of the agency***.

To complete your registration as the Principal of an agency verify the name of the agency in the box and click ***Yes***. To cancel, click ***No***.

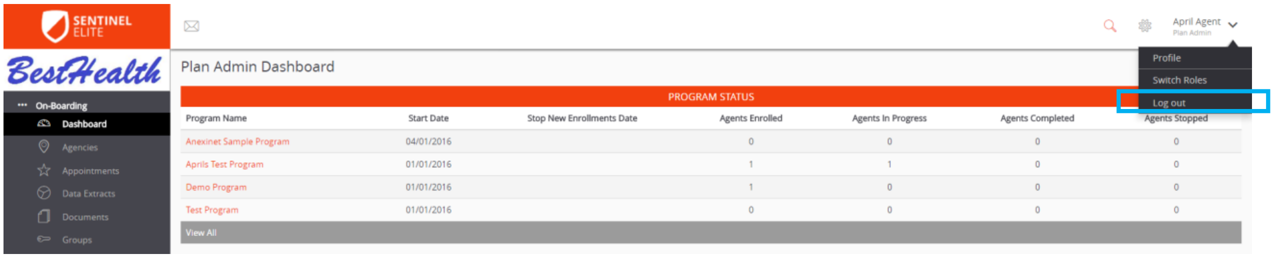


Once you have completed your registration as the Principal of an agency Sentinel Elite™ will display the affiliation below your ***Login Credentials*** on the ***My Profile*** screen.



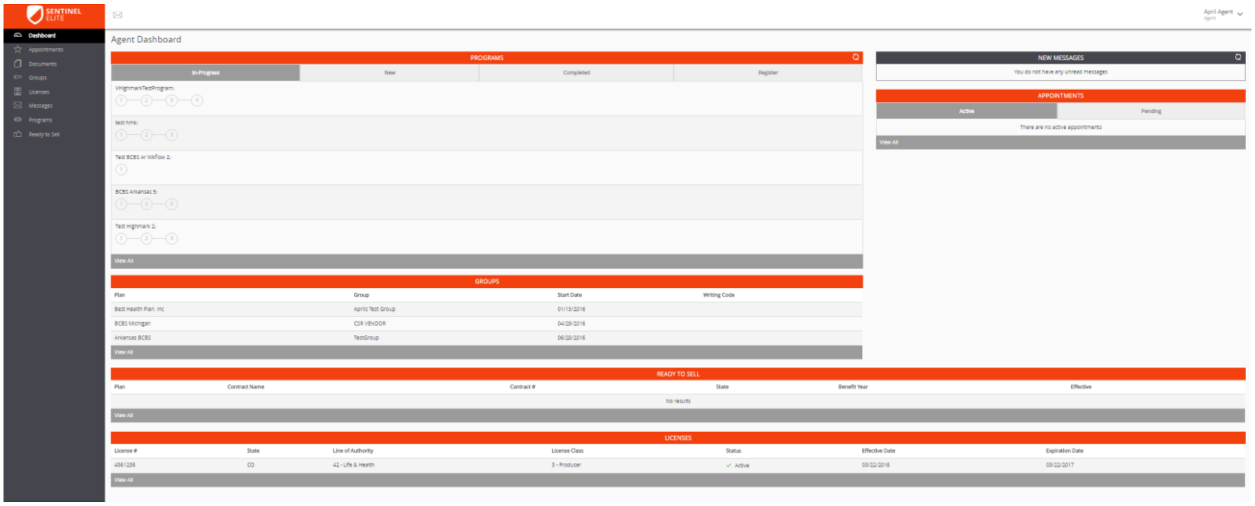
LOGGING OUT

To log out, place the cursor on your name in the upper right hand corner of the screen and click the down arrow to the right. Select ***Log out*** from the drop down menu.



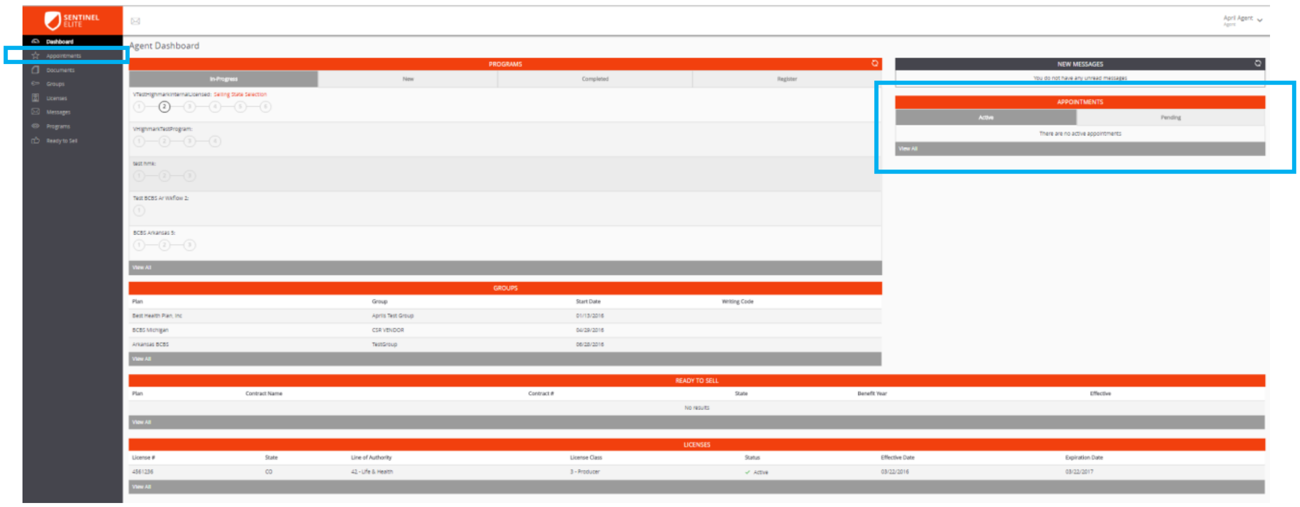
AGENT DASHBOARD

The Agent Admin Dashboard is the hub of Sentinel Elite™ and thus the landing page. The Dashboard provides a snapshot of your activity in several categories for all Plans you work with that utilize Sentinel Elite™. You will see your Program Status, Groups, Ready to Sell status, applicable Appointments, Licenses, and New Messages. You will also be able to access your Documents, including certificates of completion for courses you have successfully completed.



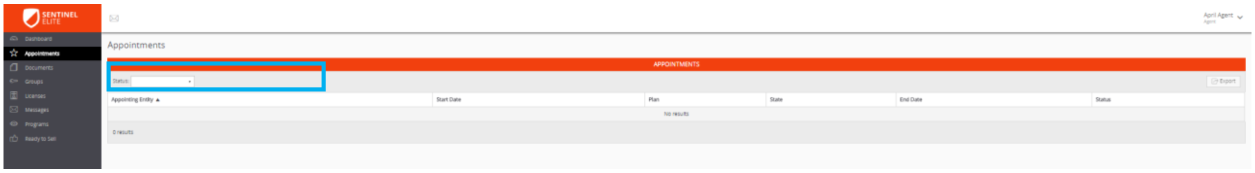
APPOINTMENTS

To manage your ***Appointments***, you may either, click the ***Appointments*** icon in the Menu to the left of the screen or go to the ***Appointments*** section located on the Agent Dashboard in the upper right of the screen. The ***Appointments*** section in the Agent Dashboard will provide a snapshot of your appointments. Your ***Appointment*** information is refreshed on a daily basis. To see all of your appointments click ***View All*** in the gray bar below the displayed appointments.



Once on the ***Appointment*** screen you may search by your appointment ***Status (Appointed, Exception, Failed, Pending, Record Not Found, Submitted to State, or Terminated)***.

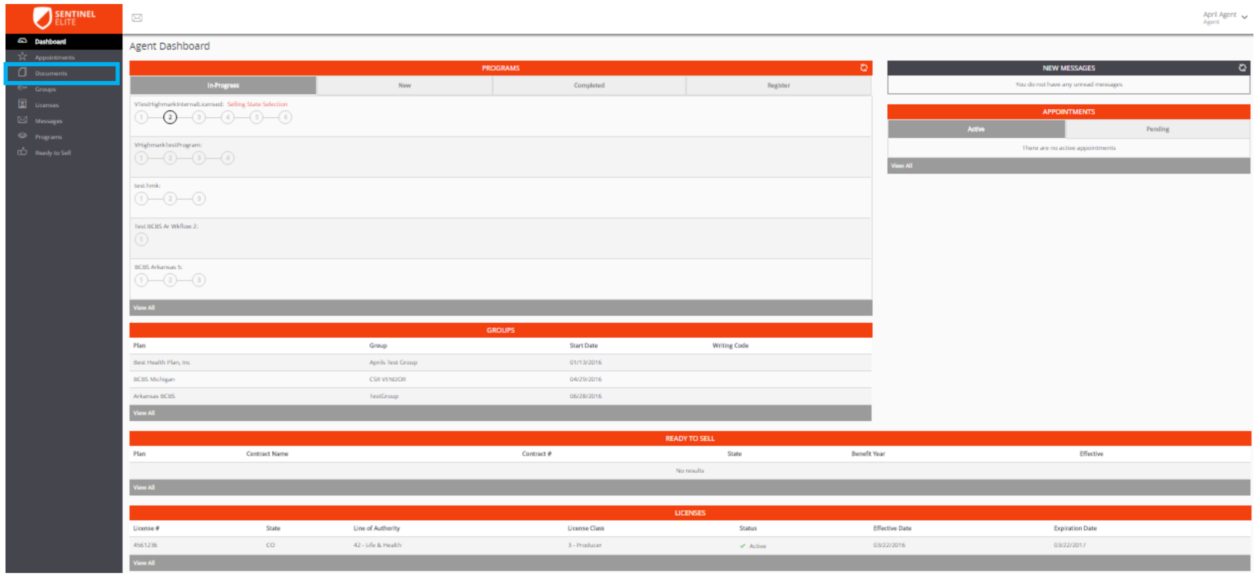
You may also filter by Appointing Entity, Start Date, Plan, State, End Date, or Status.



DOCUMENT MANAGEMENT

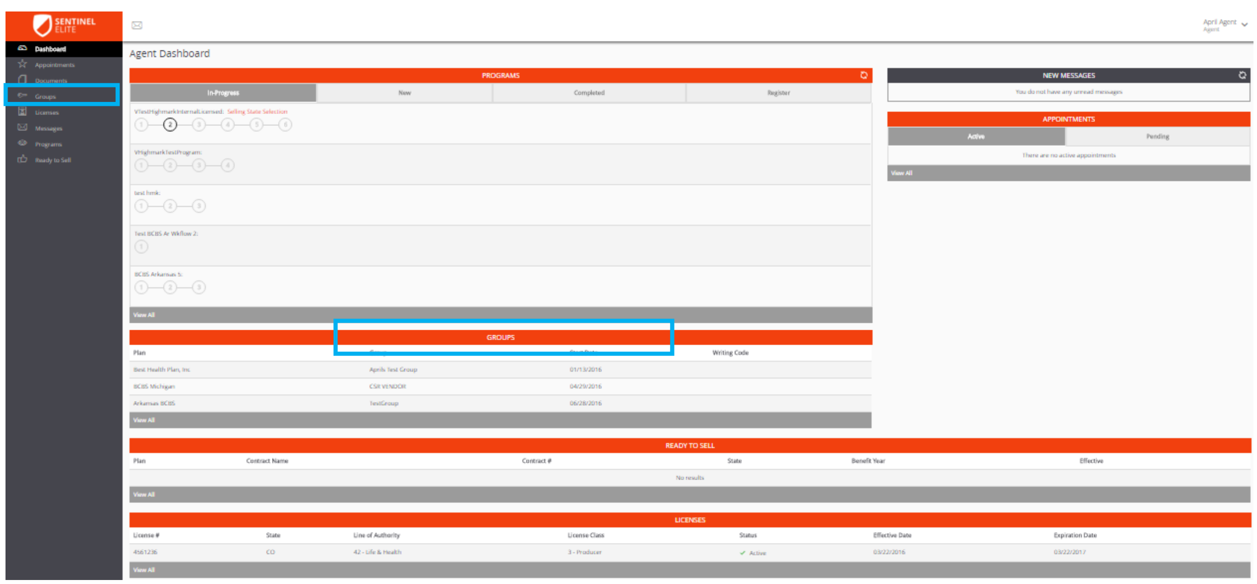
Document Storage

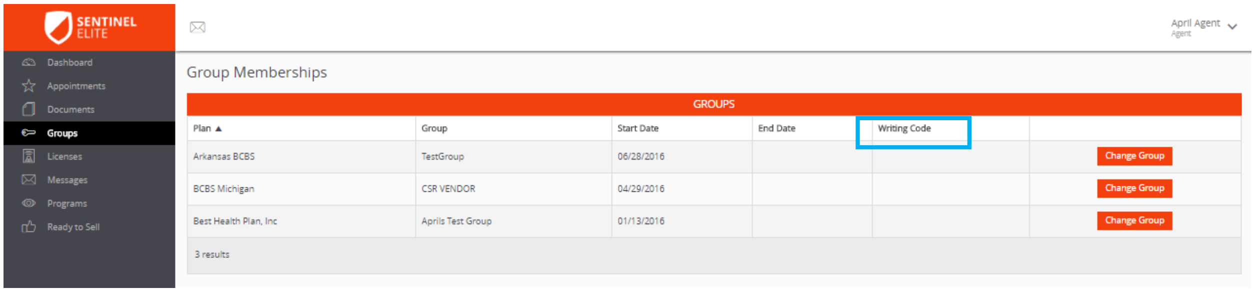
To manage your stored documents, click the ***Documents*** icon in the ***On-Boarding*** Menu to the left of the screen. You will be able to view any documents that have been loaded to Sentinel Elite™ either independently or through a program including certificates of completion for training courses you have successfully completed.



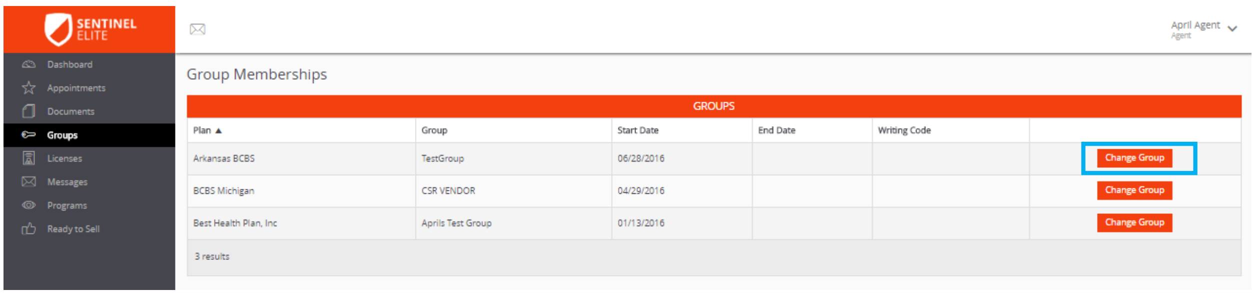
GROUP MANAGEMENT

To view your ***Groups***, you may either, click the ***Groups*** icon in the menu to the left of the screen or go to the ***Groups*** section located in the center of the Agent Dashboard. The ***Groups*** section in your Agent Dashboard will provide a snapshot of your groups. To see all of your groups click ***View All*** in the gray bar below the displayed groups.





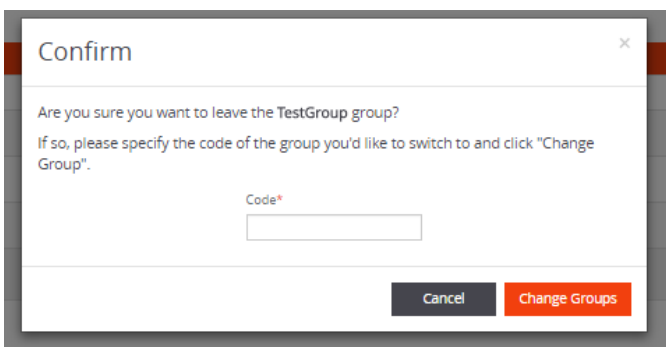
The ***Group Membership*** screen is where you will find your ***Writing Code*** (when assigned via Sentinel Elite™). You will be able to view your Plans and affiliated group along with associated ***Writing Code or Agent ID***.



The ***Group Memberships*** screen is also where you'd request a change in Group*. To request a change in group for a specific Plan you must first have the Group PIN Code for the group you would like to move to.

Tip: You may only be affiliated with one Group at a time per Plan**.**

To request a change in Group, click ***Change Group*** to the right of the Group information on the ***Group Memberships*** screen.



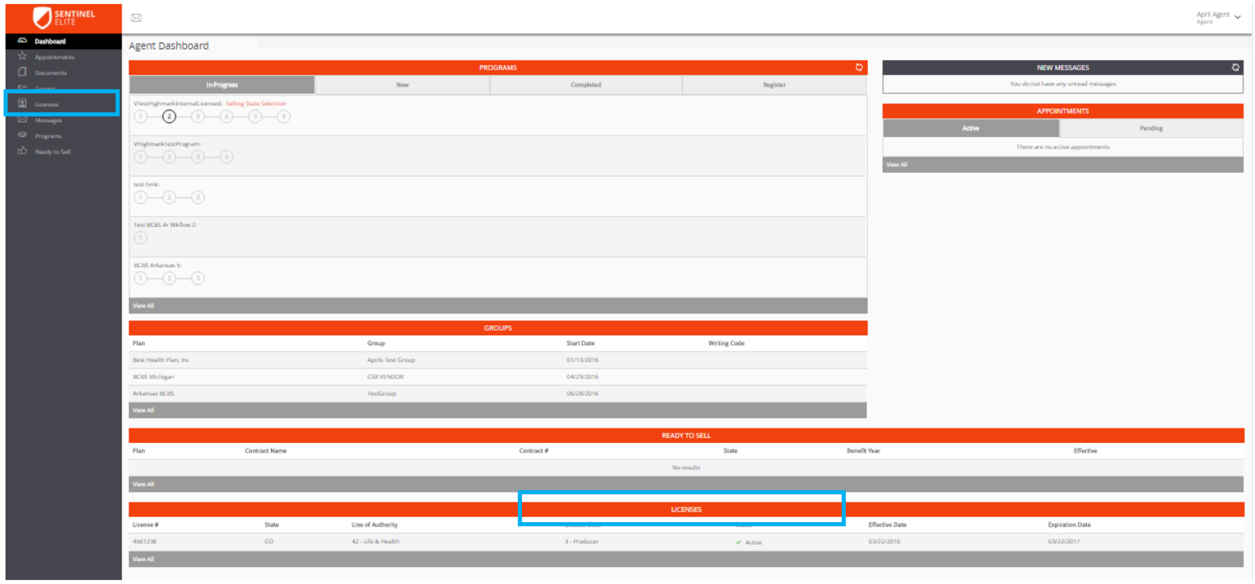
You will then be prompted to enter the Group PIN Code for the group you would like to move to.

Once you have submitted this information, a message will automatically be sent to your Plan indicating that you would like to change groups. The Plan may approve or deny this request. They may also require additional information be completed to process your request. You will be notified of the Plans decision.

- * Group changes may not be available for all Plans.

LICENSES

To view your ***Licenses***, you may either, click the ***Licenses*** icon in the menu to the left of the screen or go to the ***Licenses*** section located at the bottom of the Agent Dashboard. The ***Licenses*** section in the Agent Dashboard will provide a snapshot of your licenses. To see all of your licenses click ***View All*** in the gray bar below the displayed licenses.



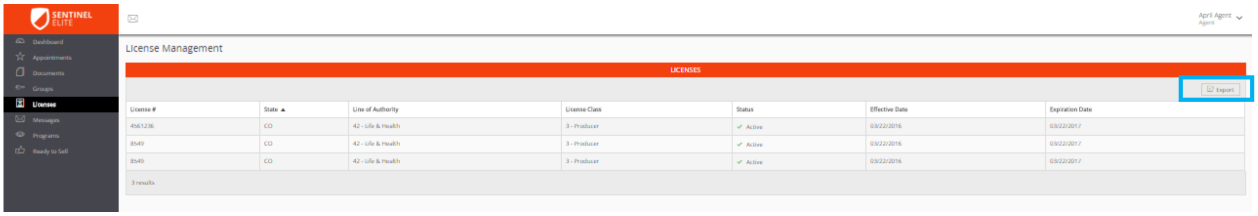
Your license information is refreshed on a daily basis.

You may utilize Sentinel Elite™ to monitor your licenses and track licenses with upcoming expiration dates.

When your license expiration date is highlighted in yellow it indicates that your license will be **expiring within the next 30 days**.

While on the ***License Management*** screen, any licenses that have already **expired will be highlighted in red**.

You will be able to export a list of your licenses. To do so, click ***Export*** in the top right corner of the ***License Management*** screen

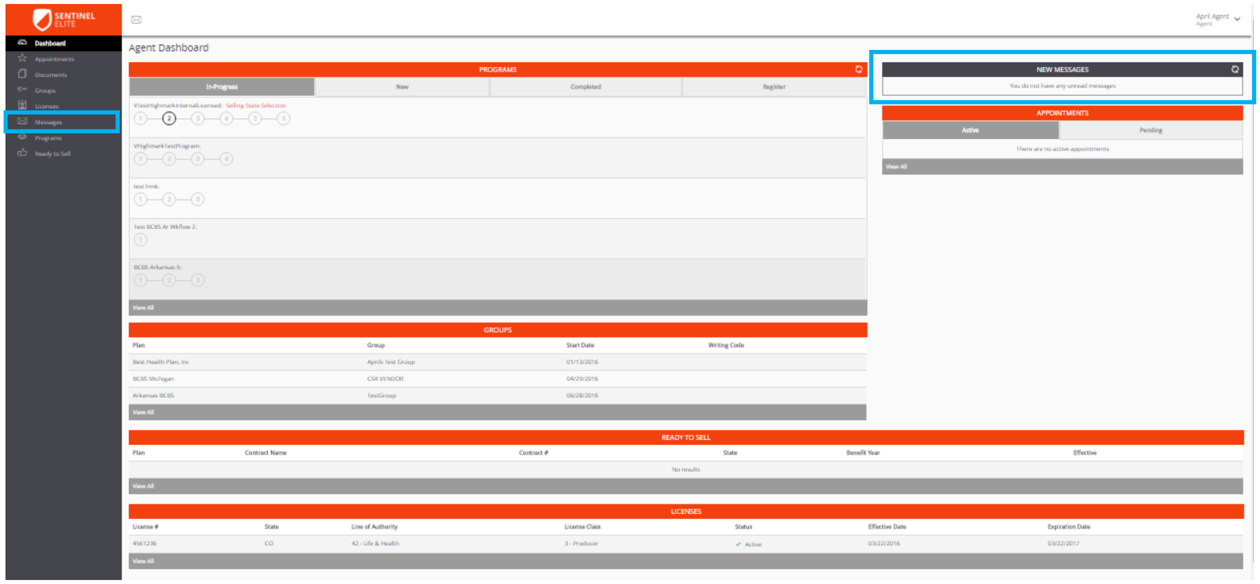


This will produce an excel spreadsheet for your use.

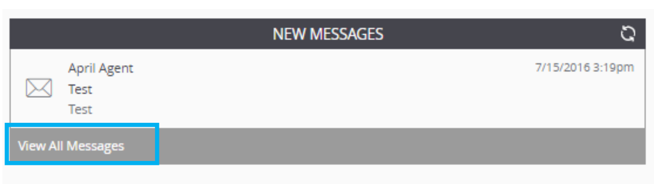
	A	B	C	D	E	F	G	H
1	License ID	License Number	State	LOA Code	License Class Code	Status	Effective Date	Expiration Date
2	4	4561236	CO	42 - Life & Health	3 - Producer	Active	3/22/2016	3/22/2017
3	5	8549	CO	42 - Life & Health	3 - Producer	Active	3/22/2016	3/22/2017
4	6	8549	CO	42 - Life & Health	3 - Producer	Active	3/22/2016	3/22/2017
5								

MESSAGING CENTER

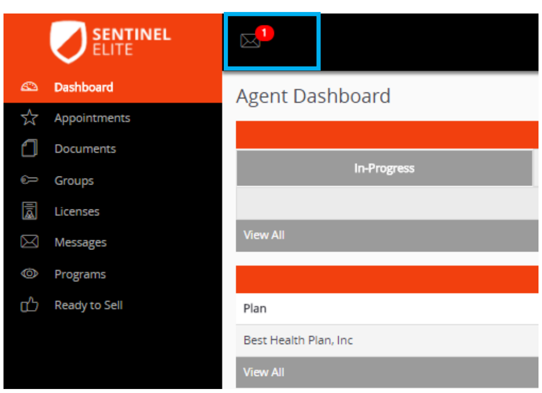
The Messaging Center will be activated when you receive a message. To manage your ***Messages***, you may either, click the ***Messages*** icon in the Menu to the left of the screen or go to the ***New Messages*** section located at the top right of the Agent Dashboard.



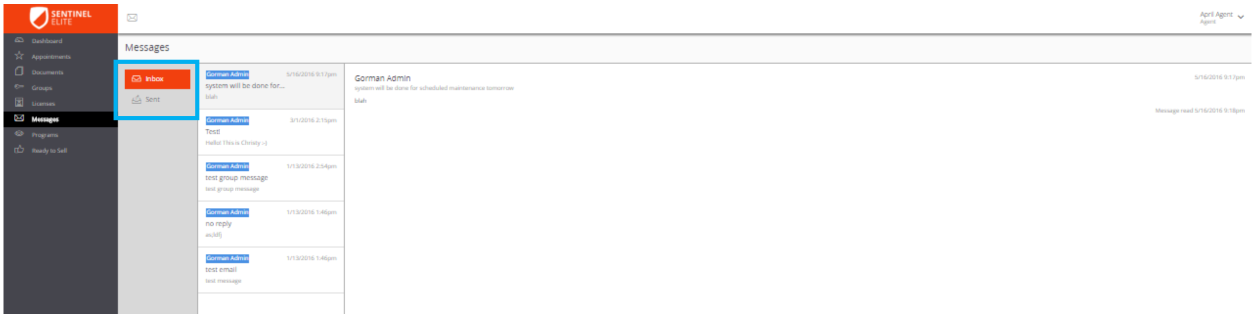
The ***New Messages*** section in the Agent Dashboard will provide a snapshot of your messages. To see all of your messages, click ***View All Messages*** in the gray bar below the displayed messages.



The new messages indictaor in the top left of the Agent Dashboard will display how many new messages you have.



Once on your ***Messages*** screen you will be able to see both new messages and sent messages.



To reply to a message, compose your reply and click ***Reply.***

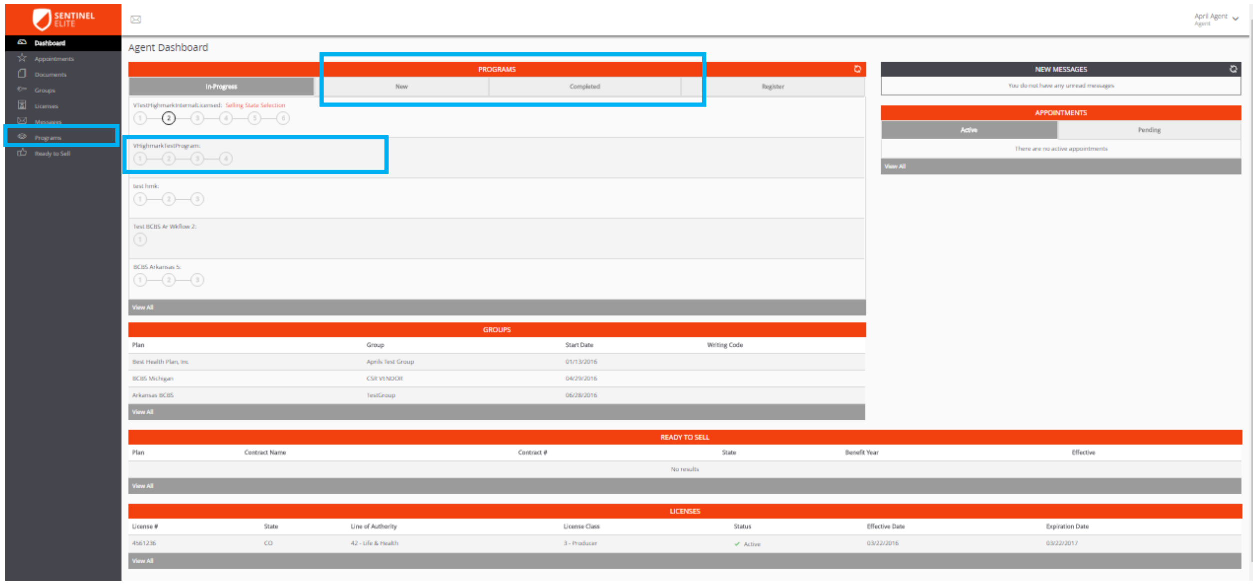
Note: You may not be able to reply to all messages, as some are sent as informational only and do not allow a reply.

PROGRAMS

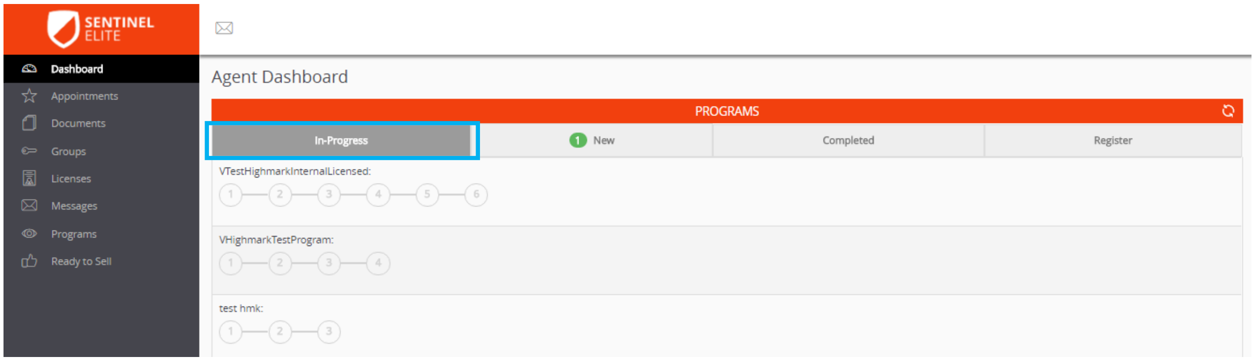
To manage your ***Programs*** go to the ***Programs*** section located at the top of the Agent Dashboard.

While viewing your programs on the Agent Dashboard, you may scroll over the timeline to see what each step consists of e.g. Welcome, License Check, and Product Training.

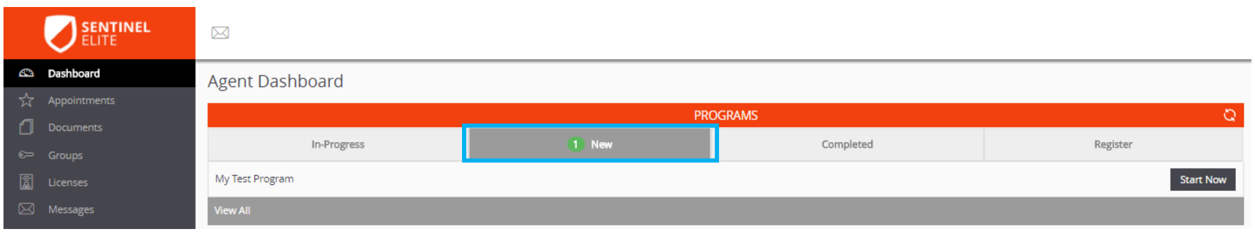
Some steps may require action and others may automatically process as you work through a program.



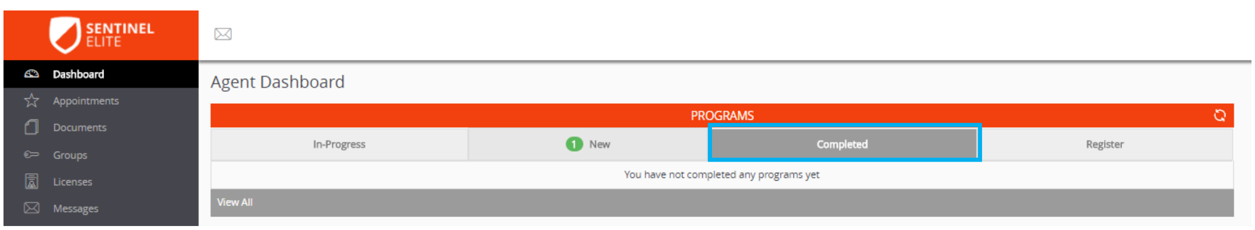
Programs you have started will appear in the ***In-Progress*** section.



Programs that you have recently been enrolled in will appear in the ***New*** section and will include an indicator identifying how many new programs you have been enrolled in. Enrollment for this area occurs at the Plan level and does not require the entry of a Registration Code.

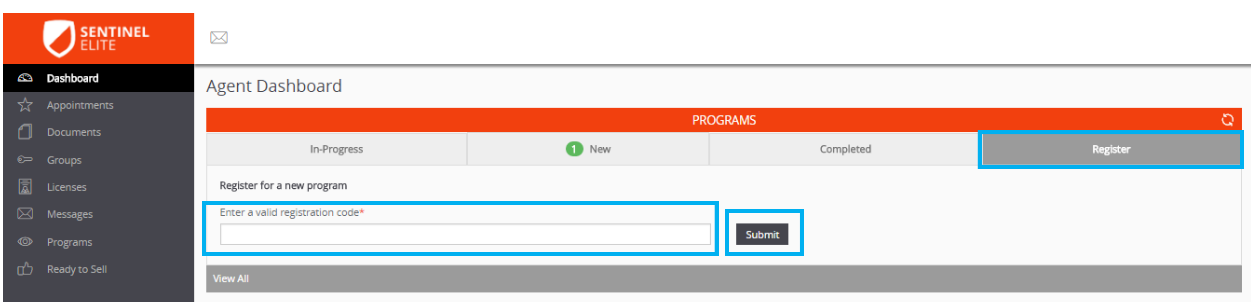


Programs you have already completed will appear in the ***Completed*** section.

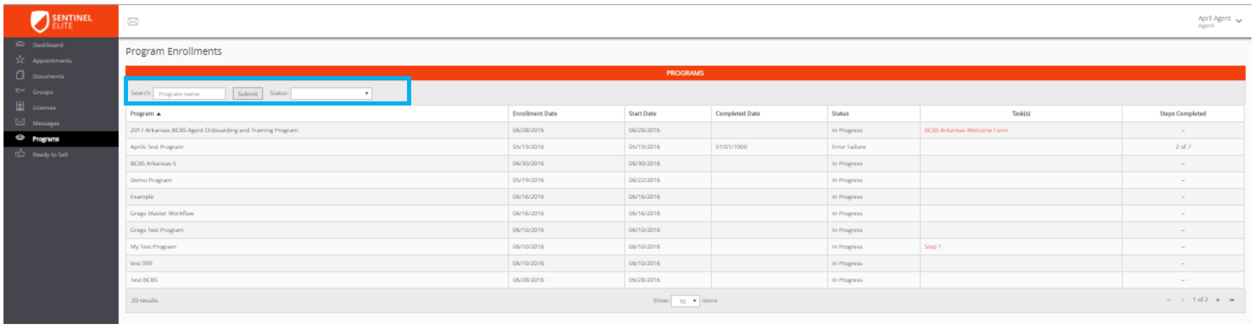


To ***Register*** for a program <u>for which you have the ***Registration Code***</u>, click ***Register*** in the ***Programs*** section on the Agent Dashboard.

Enter your ***Registration Code*** and click ***Submit***.



To view all ***Programs***, you may either, click the ***Programs*** icon in the Menu to the left of the screen or go to the ***Programs*** section located at the top of the Agent Dashboard and click ***View All*** in the gray bar below the displayed programs.

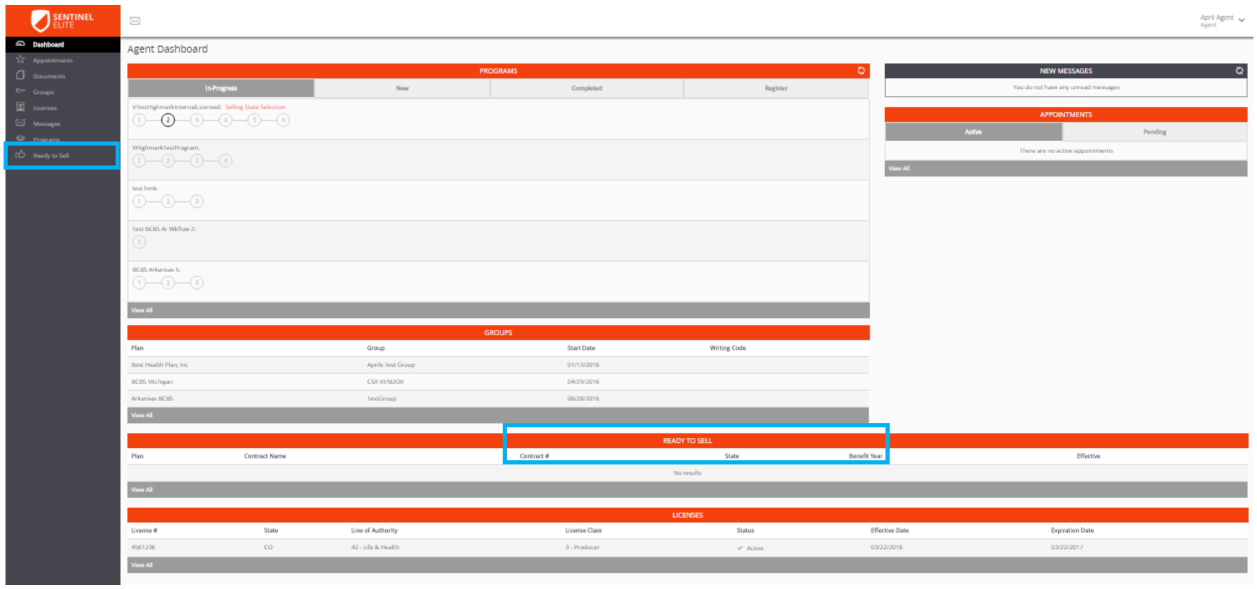


Once on the ***Program Enrollments*** screen, you will be able to search by ***Status*** (Completed, Error Failure, In Progress, Not Started, Stopped, Terminated, and Waiting for Condition).

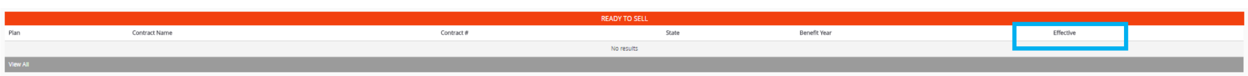
You may also filter by Program Name, Enrollment Date, Start Date, Completed Date, Status, Tasks remaining, and Steps Completed.

READY TO SELL MANAGEMENT

To view the contracts for which you are ***Ready to Sell***, you may either, click the ***Ready to Sell*** icon in the Menu to the left of the screen or go to the ***Ready to Sell*** section located toward the bottom of the Agent Dashboard. The ***Ready to Sell*** section in the Agent Dashboard will provide a snapshot of the contracts for which you are ready to sell. To see all of the contracts for which you are ready to sell click ***View All*** in the gray bar below the displayed ready to sell contracts.



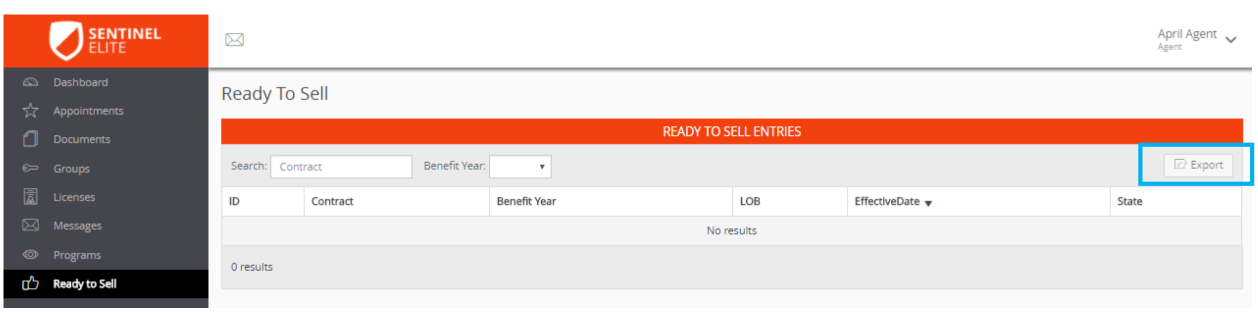
The exact date you are eligible to sell under a specific contract will be displayed on the Ready to Sell screen under ***Effective***.



Once on the ***Ready to Sell*** screen you will be able to manage all of the contracts for which you are able to sell. You will be able to search by ***Contract Name*** or ***Benefit Year***.

You may also filter by ID, Contract, Benefit Year, LOB (Line of Business), Effective Date, or State.

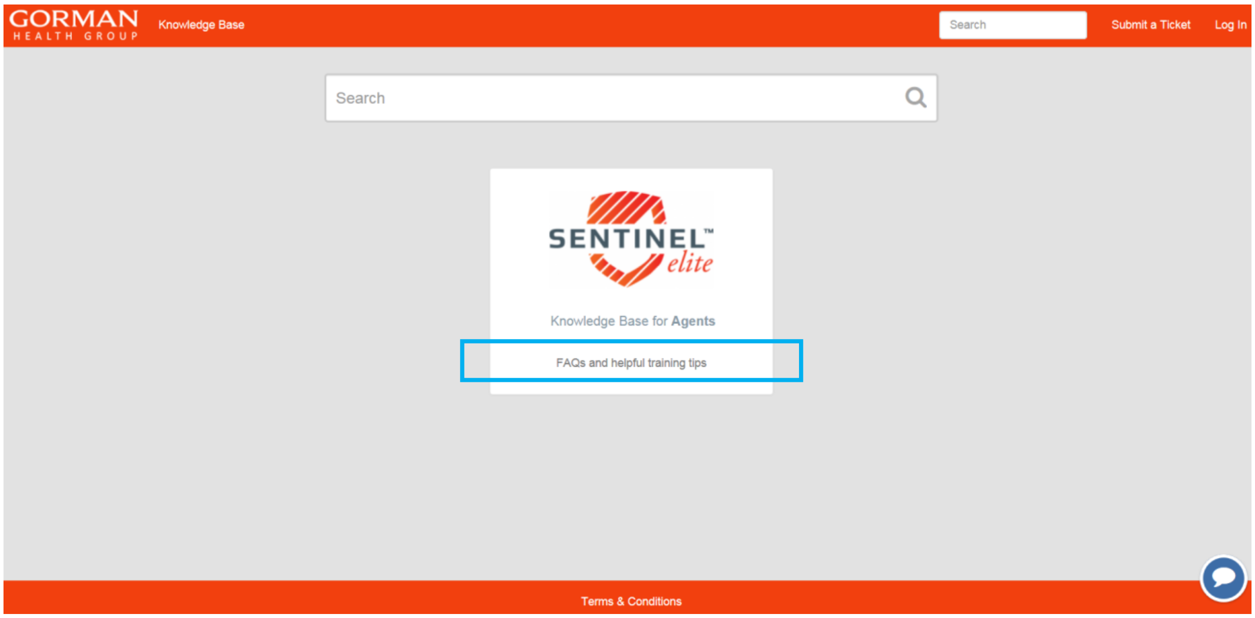
To ***Export*** a list of the Contracts for which you are ready to sell, click ***Export*** in the top right corner of the ***Ready to Sell*** screen. This will produce an Excel spreadsheet of the contracts for which you are ready to sell.



HELP

AGENT HELP PORTAL

The agent Help Portal or ***Knowledge Base*** can be accessed at https://ghg.na2.teamsupport.com/knowledgeBase.



The ***Knowledge Base*** will provide answers to many frequently asked questions, such as How do I reset my password?