



BROKER PORTAL

A comprehensive user guide

2018

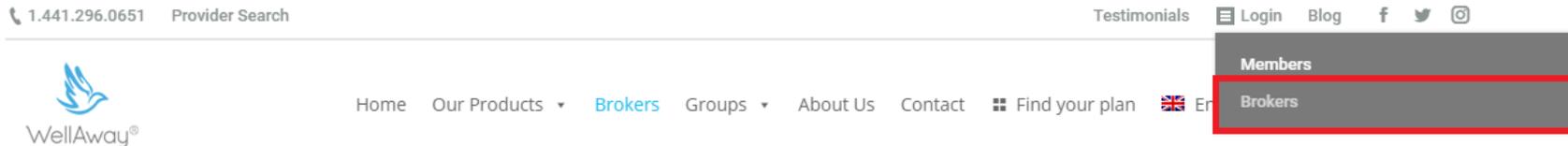
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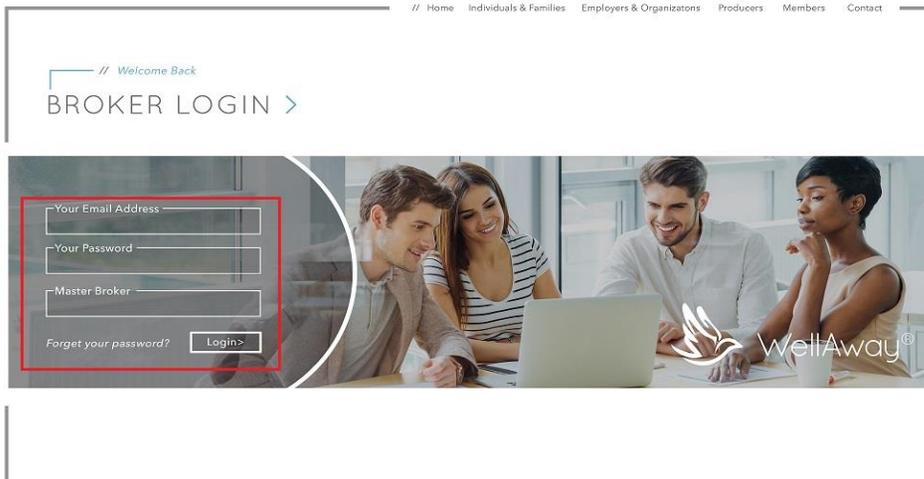
How to Access Your Portal

- Visit the website: www.wellaway.com

Click on the “Login” button



- Enter the credentials that were sent by email. You will need to type your password manually
 - **do not copy and paste from the email**
- Enter the name of your “Master Broker”

A screenshot of the WellAway Broker Login page. The page has a header with navigation links: Home, Individuals & Families, Employers & Organizations, Producers, Members, and Contact. Below the header, there is a 'Welcome Back' message and a 'BROKER LOGIN >' heading. The main content area features a login form with three input fields: 'Your Email Address', 'Your Password', and 'Master Broker'. A 'Login>' button is located at the bottom right of the form. A 'Forget your password?' link is also present. The background of the form area shows a group of four people (three men and one woman) sitting around a table, looking at a laptop. The WellAway logo is visible in the bottom right corner of the image.

Creating a Strong Password:

- Must be at least 9 digits
- Use at least 1 capital letter (A, B, C, ...)
- Use at least 1 number (1, 2,3 ...)
- Use at least 1 special character (!, @, #, \$, *, & ...)

Strong password: **Well@way2018!**

Weak password: **wellawaylimited**

Getting a Quote

When you log in to your portal with the credentials provided, your requested quotes are under [producer's quote](#).

After you have logged in, go to the product page (for example, ORBE) and click/tap on the [Get Quote](#) button.



Broker Portal Home Page

Your Broker Portal Features:

- Your name and general information
- Number of policies
- Number of quotes
- A custom URL for each WellAway product

The screenshot displays the Broker Portal Home Page for Bird WellAway. At the top, there is a navigation bar with a 'Home' button highlighted in red, alongside 'Policies' and 'Quotes' buttons. The main content area is divided into several sections:

- User Profile:** Displays the name 'Bird WellAway', email 'quotes@wellaway.com', phone '+14412960651', number 'S15BM0001-001', and company 'WellAway Ltd'. A placeholder profile picture is shown.
- Policy Summary:** Shows 'Policies active: 28', 'Policies cancelled: 6', 'Oldest Policies: Philippe Pire (Sun 03,2015)', and 'Newest Policies: Thomas Pasquet (Mon 06,2016)'. Below this, it lists 'LVE: 34', 'OW1: 0', and 'OW2: 0'.
- Summary Cards:** Three cards for 'Policies' (35), 'Quotes' (208), and 'Messages' (New messages: 0 (coming soon)).
- Products:** A section with four product buttons: 'LVE', 'NA', 'OW1', and 'OW2'. Each button has a gear icon and a dropdown arrow.
- My benefits:** A dark blue button with a white envelope icon, highlighted in red. Below it, a red box contains the URL: www.wellaway.com/Product/OneWorld/S15BM0001-001?Zone=2.

How to Use Your Custom URL

Custom URLs ensure that quotes and applications remain linked to your business.

Your custom URLs can be found on your broker portal.

- Each broker registered with WellAway is given a custom URL. These URLs are different for every broker.
- Your custom URL links quotes and applications to your business in the WellAway system.

If you or your client complete an application without using your custom URL, the system will automatically assign the policy to WellAway.

The screenshot displays the WellAway broker portal interface. At the top, there are navigation tabs for Home, Policies, and Quotes. The main header area includes the user's name 'Bird WellAway', contact information (Email: quotes@wellaway.com, Phone: +14412960651, Number: S15BM0001-001, Company: WellAway Ltd), a profile picture, and summary statistics (Policies active: 28, Policies cancelled: 6, Oldest Policies: Philippe Pire (Sun 03,2015), Newest Policies: Thomas Pasquet (Mon 06,2016)). Below the header, there are sections for Policies (35), Quotes, and Messages (0). A 'My benefits' dropdown menu is open, showing a custom URL: www.wellaway.com/expatriate-programs/new-american/S15BM0001-001, which is highlighted with a red box. At the bottom, there are buttons for LVE, NA, OW1, and OW2.

Documents

Documents

LVE

- 1- Application
- 2- Brochure
- 3- Summary of Benefits of Prestige 2500
- 4- Summary of Benefits of Premier 4500

New American

- 1- Application
- 2- Brochure
- 3- Summary of Benefits of Elite 1000
- 4- Summary of Benefits of Prestige 1500
- 5- Summary of Benefits of Prestige 2500
- 6- Summary of Benefits of Premier 3500
- 7- Summary of Benefits of Premier 4500

OneWorld

- 1- Application
- 2- Brochure
- 3- Summary of Benefits

Pristine

- 1- Brochure
- 2- Summary of Benefits

AKIN

- 1- Application
- 2- Brochure
- 3- Summary of Benefits

ORBE

- 1- Application
- 2- Brochure
- 3- Summary of Benefits

Forms and Documents

- 1- Change of Contact Information Form
- 2- International Claim Form
- 3- Policy Change Form (English)
- 4- Policy Change Form (French)
- 5- Product Catalog
- 6- Wire Instructions

Optional Benefits

- 1- 2017 Dental Benefit Rider
- 2- 2017 Vision Benefit Rider
- 3- 2017 Dental & Vision Benefits Package (Available with ORBE ONLY)
- 4- 2018 Dental Benefit Rider
- 5- 2018 Vision Benefit Rider
- 6- 2018 Dental & Vision Benefits Package (Available with ORBE ONLY)

For every WellAway product you can find related documents:

- 1- Application
- 2- Brochure
- 3- Summary of Benefits

Forms and Documents section:

- 1- Change of Contact Information Form
- 2- International Claim Form
- 3- Policy Change Form (English)
- 4- Policy Change Form (French)
- 5- Product Catalog
- 6- Wire Instructions

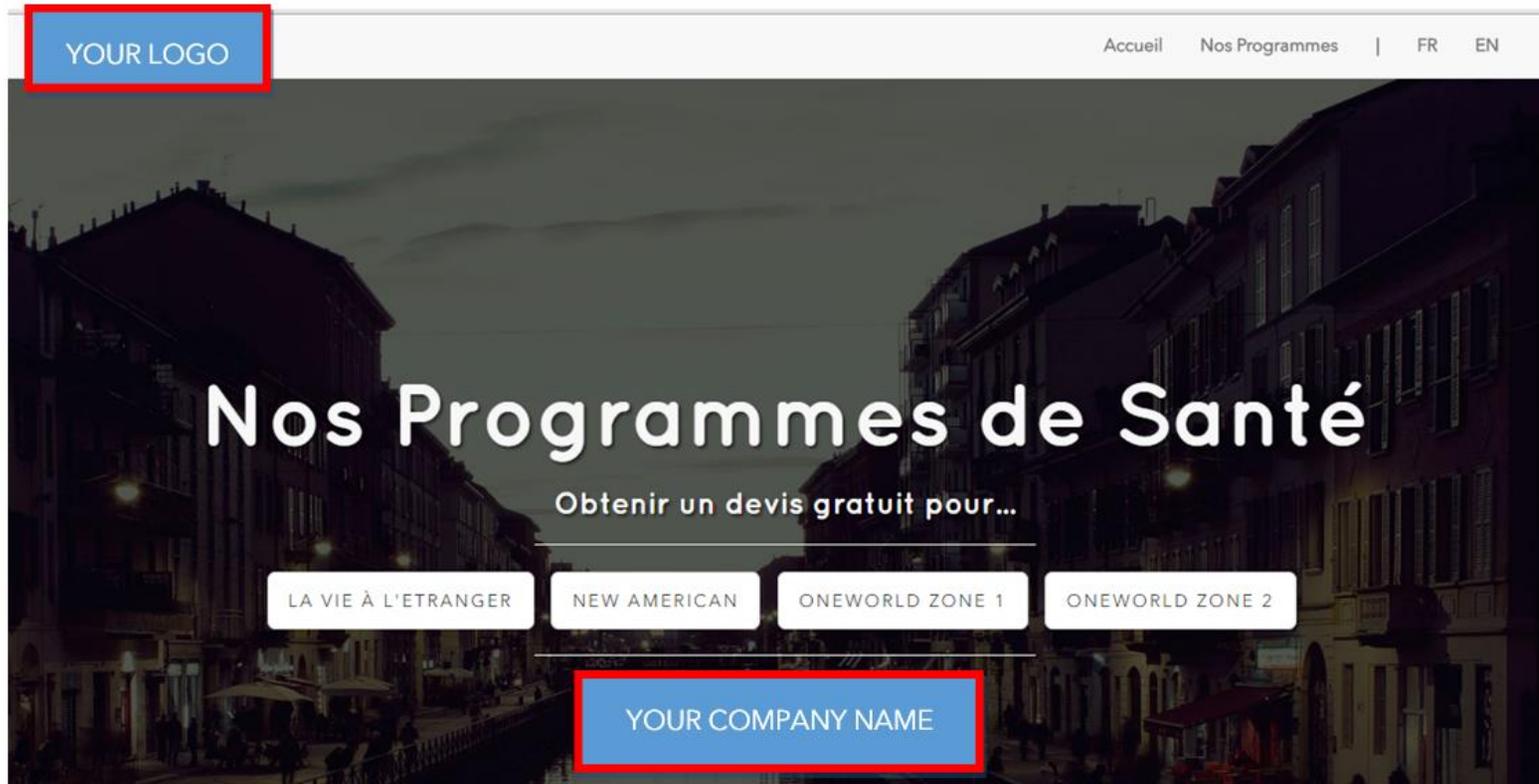
Optional Benefits Riders section:

- 1- 2017 Dental Benefit Rider
- 2- 2017 Vision Benefit Rider
- 3- 2017 Dental & Vision Benefits Package (Available with ORBE ONLY)
- 4- 2018 Dental Benefit Rider
- 5- 2018 Vision Benefit Rider
- 6- 2018 Dental & Vision Benefits Package (Available with ORBE ONLY)

Your Microsite

Your microsite is linked to our WellAway system, but it showcases your company name and logo.

Use your microsite (for example, yourcompany.wellaway.com) to complete applications and quotes. Your microsite gives you access to the custom URLs that link applications and quotes to your business.



Policies

In the **Policies** Section you will find:

- All your policies: active and cancelled in status
- The monthly premium amount and the *pro rata* if applicable
- Optional benefits and their cost

Home **Policies** Quotes

2- Search by name

P.H.	Policy	✓ Status	Product	Plan	Start date	Pro-Rata	Premium	✓ Maternity	✓ Dental	✓ Vision	CFE	✓ WW	Documents
		Active	International Student	Gold	1/6/2017	0	260	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
		Active	International Student	Gold	1/1/2017	0	268	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
		Active	La Vie A l'Etranger	Premier	12/18/2016	169	366	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	
		Active	International Student	Gold	11/18/2016	0	135	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
		Cancelled	New American	Premier	11/17/2016	209	453	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	
		Active	La Vie A l'Etranger	Premier	11/16/2016	688	1396	<input checked="" type="radio"/>	<input checked="" type="radio"/> \$147	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	
		Cancelled	La Vie A l'Etranger	Prestige	11/11/2016	259	393	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	
		Cancelled	La Vie A l'Etranger	Premier	10/20/2016	152	386	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	
		Active	La Vie A l'Etranger	Premier	10/6/2016	741	867	<input checked="" type="radio"/>	<input checked="" type="radio"/> \$134	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	
-1		Active	International Student	Gold	10/3/2016	0	225	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	

Date of Quote	Type of Person	First Name	Last Name	Gender	Phone	Email	Date of Birth	Status	Premium	Dental	Vision	WW
10/3/2016 12:00:00 AM	PolicyHolder							1	224.9	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Additional Features

1. Click/tap the “+” icon to view additional policy details.

You will see all members included in the policy along with their personal information, premiums and optional benefits.

2. Search Engine



A - Click/tap to search

B - Click/tap to clear the selection

C - Click/tap to download all policy information as an Excel document

Additional Features

3. You can filter your searches

By Benefit Rider or Endorsement: Maternity, Dental, Vision, Worldwide

By Policy Status: Active, Cancelled

Home **Policies** Quotes

Search by name

P.H	Policy	<input checked="" type="checkbox"/> Status	Product	Plan	Start date	Pro-Rata	Premium	<input checked="" type="checkbox"/> Maternity	<input checked="" type="checkbox"/> Dental	<input checked="" type="checkbox"/> Vision	CFE	<input checked="" type="checkbox"/> WW	Documents
		Active	International Student	Gold	1/6/2017	0	260	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
		Active	International Student	Gold	1/1/2017	0	268	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
		Active	La Vie A l'Etranger	Premier	12/18/2016	169	366	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
		Active	International Student	Gold	11/18/2016	0	135	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
		Cancelled	New American	Premier	11/17/2016	209	453	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
		Active	La Vie A l'Etranger	Premier	11/16/2016	688	1396	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> \$147	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
		Cancelled	La Vie A l'Etranger	Prestige	11/11/2016	259	393	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
		Cancelled	La Vie A l'Etranger	Premier	10/20/2016	152	386	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
		Active	La Vie A l'Etranger	Premier	10/6/2016	741	867	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> \$134	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
		Active	International Student	Gold	10/3/2016	0	225	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Date of Quote	Type of Person	First Name	Last Name	Gender	Phone	Email	Date of Birth	Status	Premium	Dental	Vision	WW
10/3/2016 12:00:00 AM								1	224.9	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Icons



Filter your selections



Cancel your selections



Download your searches

You can download your searches as an Excel spreadsheet, by clicking on XLS.



Download your client's member packages



Upload your client's documents



Download your client's documents

Quotes

The *Quotes* section lets you see all the quotes you have requested.

Click/tap on *Go Back to the Application* to start the application process based on the quote.

Tip: If you need to return to a previous step or screen, use the navigation bar at the top of the page instead of using the browser back button.

Name	Email	Product	Nationality	Phone	Quotation Date	Start date	Spouse	# Children	URL	
		NewAmerican	France		12/21/2016	1/1/2017	1	0	Go back to application	Delete
		OneWorld1	France		12/21/2016	2/1/2017	0	3	Go back to application	Delete
		NewAmerican	Brazil		12/21/2016	1/1/2017	1	0	Go back to application	Delete
		OneWorld1	Argentina		12/20/2016	1/1/2017	1	2	Go back to application	Delete
		NewAmerican	France		12/20/2016	1/1/2017	0	0	Go back to application	Delete
		NewAmerican	France		12/20/2016	1/1/2017	0	0	Go back to application	Delete
		NewAmerican	France		12/20/2016	1/1/2017	1	1	Go back to application	Delete
		LVE	France		12/20/2016	1/1/2017	0	0	Go back to application	Delete
		LVE	France		12/20/2016	1/1/2017	1	1	Go back to application	Delete
		LVE	France		12/20/2016	1/1/2017	0	0	Go back to application	Delete

Quotes

Sort quotes by product

Select the product then **press enter** to make your selection.

The screenshot shows a web application interface for managing quotes. At the top, there are filter tabs: LVE (selected), NA, OW1, and OW2. A search bar labeled 'Search by Name' is on the right. The main content is a table with columns: Name, Email, Product, Nationality, Phone, Start date, Spouse, # Children, and url. The 'Product' column is highlighted with a red box, and all entries in this column are 'LVE'. The 'Nationality' column contains 'France' for all entries. The 'Start date' column shows dates from 1/4/2016 to 1/7/2016. The 'Spouse' and '# Children' columns show varying values. The 'url' column contains links like 'Go Back to the Application' and a 'Delete' button. A large watermark 'Confidential information' is overlaid on the table. At the bottom left, it says 'Results 1 to 10' and 'Total Roles: 277'. At the bottom right, it says 'Page 1 of 28' and has a pagination control with buttons for 1, 2, 3, 4, 5, 6, 7, 8, 9, 10, and a next button.

Name	Email	Product	Nationality	Phone	Start date	Spouse	# Children	url
		LVE	France		1/4/2016	0	0	Go Back to the Application Delete
		LVE	France		1/5/2016	1	0	Go Back to the Application Delete
		LVE	France		1/5/2016	1	0	Go Back to the Application Delete
		LVE	France		1/5/2016	0	0	Go Back to the Application Delete
		LVE	France		1/5/2016	0	0	Go Back to the Application Delete
		LVE	France		1/5/2016	0	0	Go Back to the Application Delete
		LVE	France		1/5/2016	0	0	Go Back to the Application Delete
		LVE	France		1/5/2016	0	0	Go Back to the Application Delete
		LVE	France		1/6/2016	1	2	Go Back to the Application Delete
		LVE	France		1/6/2016	0	0	Go Back to the Application Delete
		LVE	France		1/7/2016	1	2	Go Back to the Application Delete

Results 1 to 10
Total Roles: 277

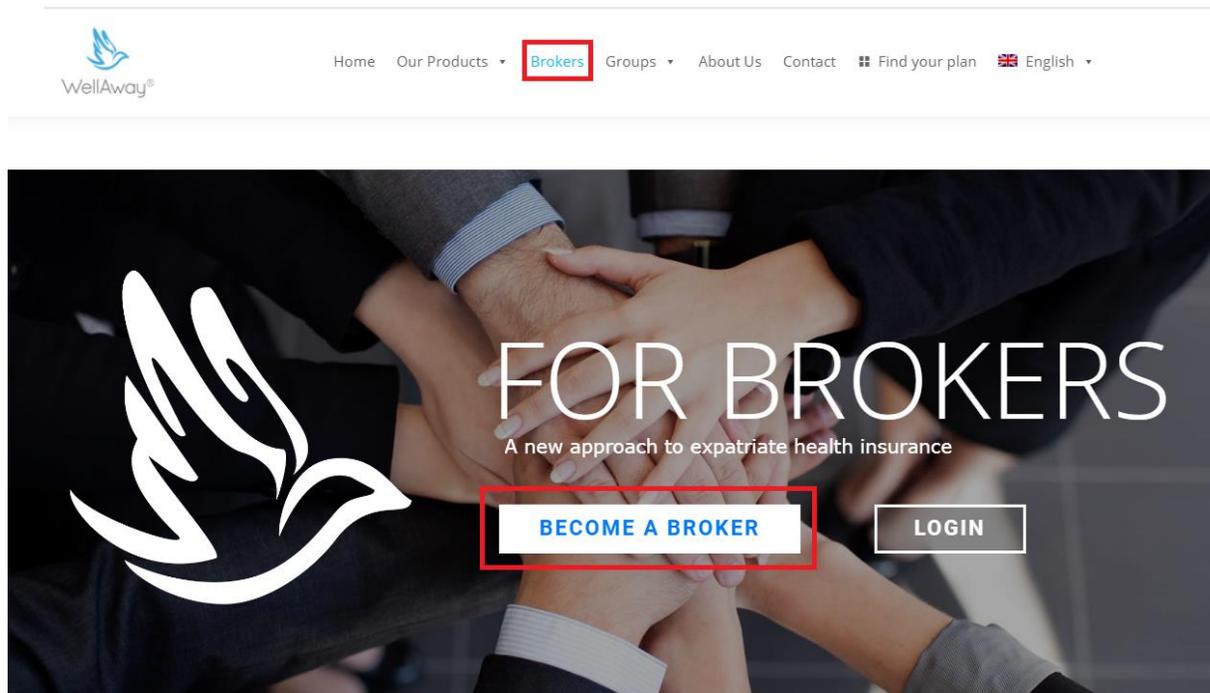
Page 1 of 28

1 2 3 4 5 6 7 8 9 10 ... »

How to add a producer or sub-producer to the WellAway Producer Network

Step 1

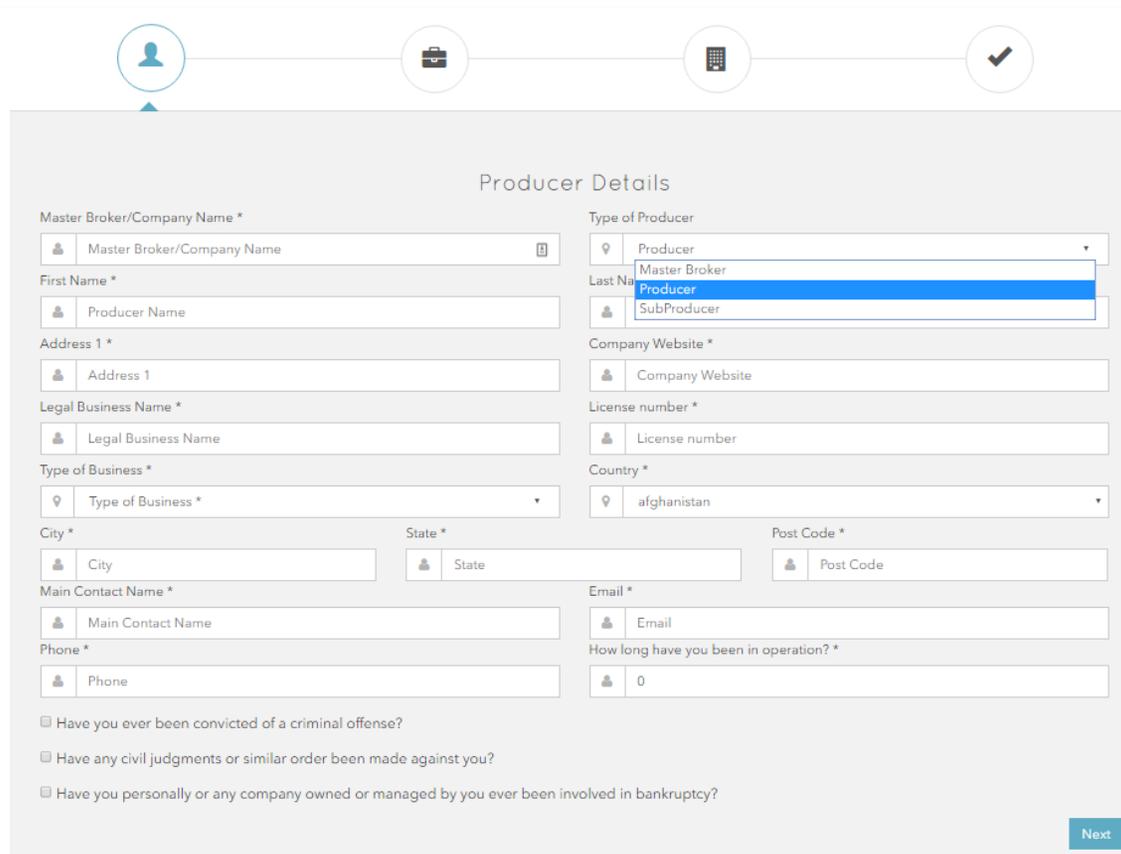
Go on the [Broker](#) page then click on [BECOME A BROKER](#)



Step 2

When you arrive on the page:

- 1- Go to [Type of Producer](#) and select [Producer](#) or [Sub Producer](#)
- 2- Fill out the form.



Producer Details

Master Broker/Company Name *
Master Broker/Company Name

First Name *
Producer Name

Address 1 *
Address 1

Legal Business Name *
Legal Business Name

Type of Business *
Type of Business *

City *
City

State *
State

Main Contact Name *
Main Contact Name

Phone *
Phone

Type of Producer
Producer
Master Broker
Producer
SubProducer

Company Website *
Company Website

License number *
License number

Country *
afghanistan

Post Code *
Post Code

Email *
Email

How long have you been in operation? *
0

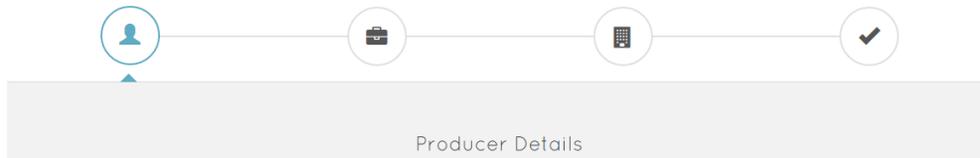
Have you ever been convicted of a criminal offense?
 Have any civil judgments or similar order been made against you?
 Have you personally or any company owned or managed by you ever been involved in bankruptcy?

Next

Step 3

Follow the instructions.

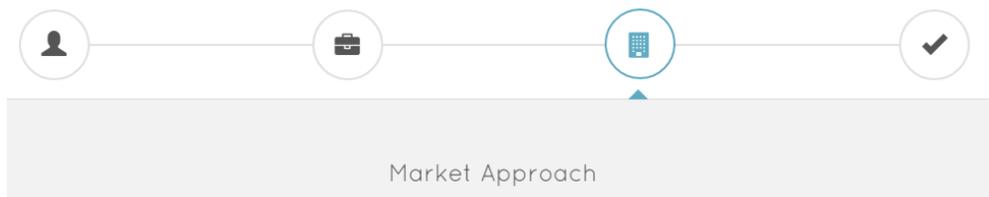
A - Producer Details:



B - Market Experience:



C- Market Approach:



D- Finale Step:



Final Step

I, the undersigned, an authorized representative of the producer, endorse the information provided in this application and to the best of my knowledge and belief, confirm that the information contained herein is correct. I understand that any agreement, contract or business arrangement created on the basis of this application will be deemed invalid should WellAway Ltd. find the information contained in this application to be false, incomplete or inaccurate. Our company after verifying all data will contact you by sending you their number only as broker.

Authorized Name *

 I accept the text above *

Do not forget to check the box

Our staff will receive your application and we will keep in touch with you for final approval.