BROKER PORTAL

Your guide to the Cigna Global Broker Portal

The Broker Portal is your gateway to managing leads, creating quotes and accessing clients' documentation. Key features include:

- Get a quote through the Broker Quote Tool
- Retrieve your previous quotes created through the portal or by the Broker Support Team
- View your AppLink quotes
- Access your clients' policy documentation including Certificate of Insurance, Policy Rules, Customer Guide and renewal documents

GETTING STARTED

1. Visit www.cignaglobal.com/brokers. Click on 'Login'.
2. Enter your login details.
   Username: this is your brokerage email address (e.g. admin@broker.com)
   Password: Use the 'Forgot Password' functionality if you have forgotten this, or contact the Broker Support Team for a reset
3. Now select your name from the list. If you are not registered under this brokerage, contact us to be added.

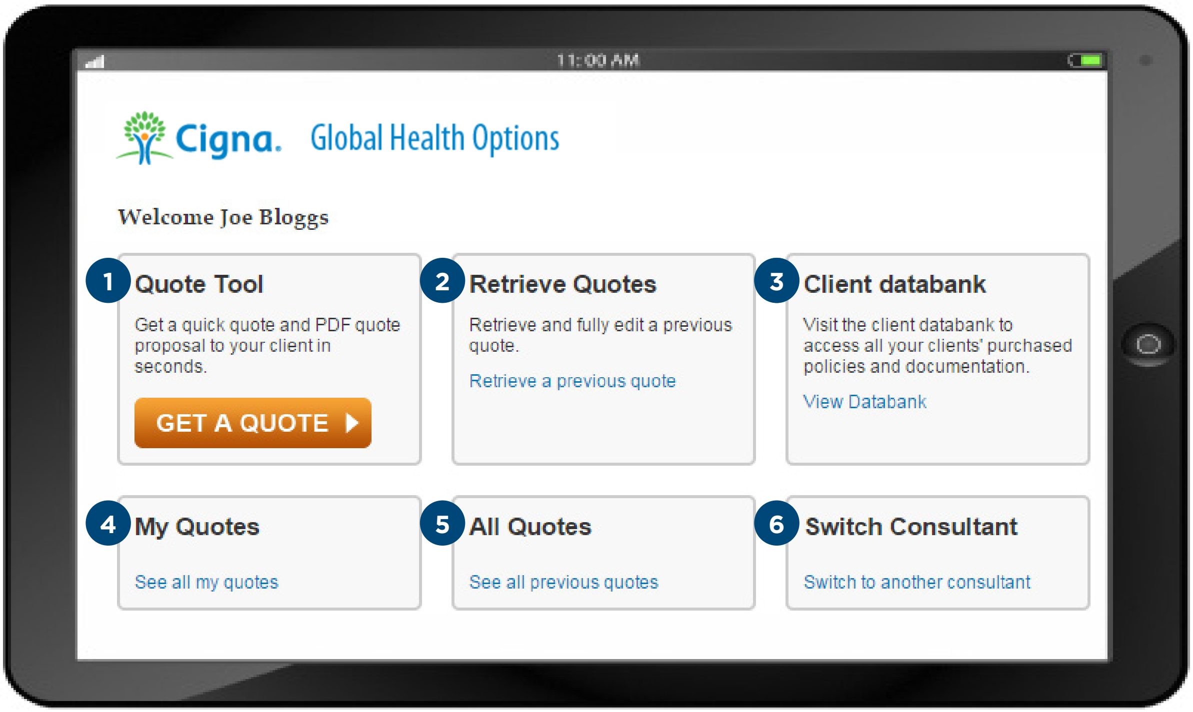
WHAT CAN I DO IN THE BROKER PORTAL?

1. **Quote Tool :** Create a quote for your client, using our easy Broker Quote Tool.
2. **Retrieve Quotes:** Retrieve a quote you created previously.
3. **Client databank:** Retrieve your client list and access important documents such as Certificate of Insurance, Policy Rules, Customer Guide and renewals documents (where applicable).

   Top tip: In client databank, leave the search fields blank and click 'Search' to see all your clients.
4. **My Quotes:** View the quotes belonging to the selected consultant.

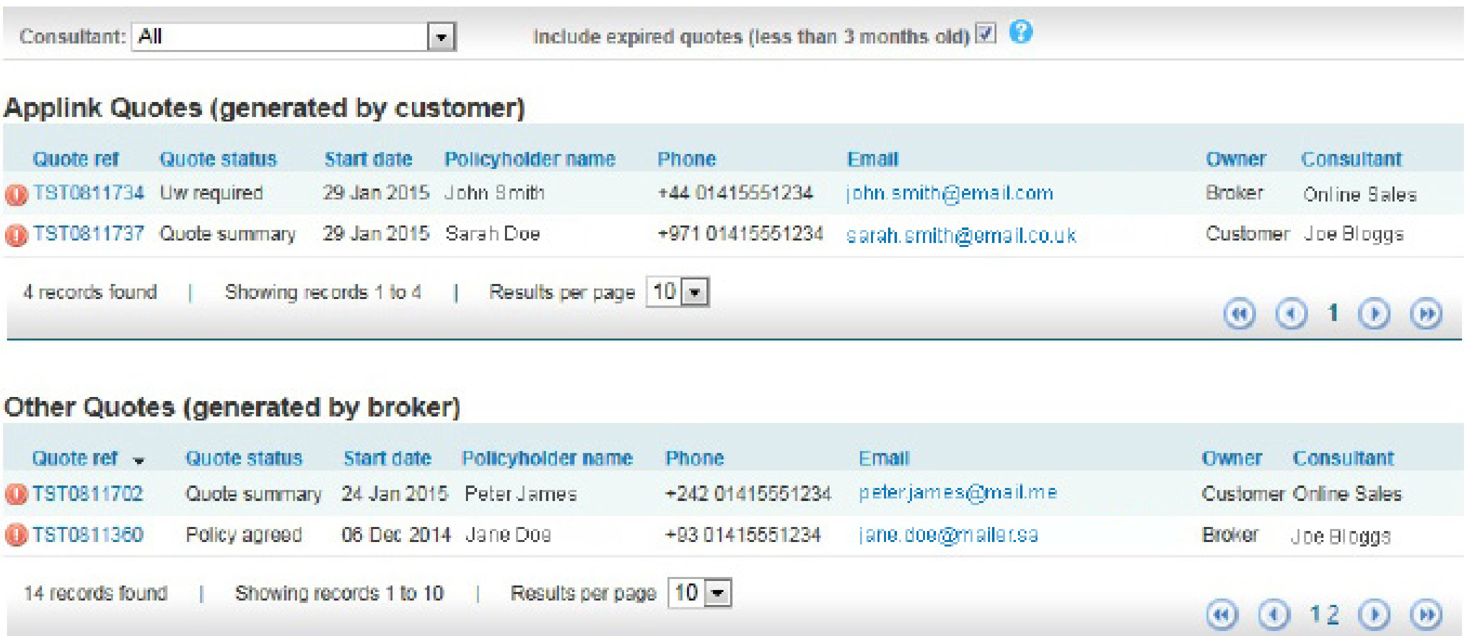
5 **All Quotes:** View all quotes belonging to the brokerage, including AppLink quotes.

6 **Switch consultants:** Switch consultants if there is more than one consultant registered at the brokerage.



INFORMATION AVAILABLE IN 'ALL QUOTES'

By clicking on 'All Quotes' in the Broker Portal, you will see an overview of your AppLink Quotes and other quotes belonging to the brokerage. Note that you can access **all contact information** from this view, to allow you to call and manage your leads.



Consultant: All | Include expired quotes (less than 3 months old)

Applink Quotes (generated by customer)

Quote ref	Quote status	Start date	Policyholder name	Phone	Email	Owner	Consultant
TST0811734	Uw required	29 Jan 2015	John Smith	+44 01415551234	john.smith@email.com	Broker	Online Sales
TST0811737	Quote summary	29 Jan 2015	Sarah Doe	+971 01415551234	sarah.smith@email.co.uk	Customer	Joe Bloggs

4 records found | Showing records 1 to 4 | Results per page 10 | 1

Other Quotes (generated by broker)

Quote ref	Quote status	Start date	Policyholder name	Phone	Email	Owner	Consultant
TST0811702	Quote summary	24 Jan 2015	Peter James	+242 01415551234	peterjames@mail.me	Customer	Online Sales
TST0811360	Policy agreed	06 Dec 2014	Jane Doe	+93 01415551234	jane.doe@mailer.sa	Broker	Joe Bloggs

14 records found | Showing records 1 to 10 | Results per page 10 | 1 2

Other information available from the 'All Quotes' view includes:

QUOTE STATUS This denotes what stage in the process the customer reached, statuses as follows:

1. **Personal details:** customer filling in their name, DOB, contact info & countries of nationality & residence.
2. **Your quote:** customer sees 3 quotes side by side (Silver, Gold & Platinum) and chooses deductibles and cost shares.
3. **Adapt quote:** customer adds on optional modules and chooses area of cover.
4. **Quote summary:** customer provided with summary of proposed cover inc final price inc tax.
5. **Finalise details:** customer completes their full contact info inc address, mobile number and occupation details.
6. **Customer self-registration:** customer completes account creation page inc creating a password and memorable information.
7. **Account created:** customer sees underwriting medical questionnaire.
8. **UW partially complete:** customer has started to complete underwriting medical questionnaire but has saved the application before proceeding.
9. **UW in process:** customer has submitted underwriting medical questionnaire and this in under review by our underwriting team.
10. **Exclusions proposed:** customer has received an email prompting them to login to their account to check and agree any proposed medical exclusions.
11. **Policy agreed:** customer sees payment screen.
12. **Policy paid:** customer has paid and the policy is now live.

OWNER Shows the ownership status, i.e. Customer or Broker.

When AppLink quotes are created, they are automatically set to Customer as the owner, since the customer created the quote. This means all automated emails with regards to the quote are sent to the customer, using the email address they entered in Personal Details.

If you go in to the Broker Portal, click on an AppLink lead and move the lead forward or backwards (i.e. pressing 'Back' or 'Next' to move on the Quote Status), you are asked to confirm that you are taking ownership of the lead. The Owner tab then changes to Broker. This means the customer no longer receives emails about the quote and these are sent to you instead.

FOR HELP, CONTACT THE CIGNA GLOBAL BROKER SUPPORT TEAM ON 877.539.6296 (IN THE AMERICAS), +44(0)1475 788682 (IN EUROPE), OR +65 6391 9787 (IN ASIA PACIFIC)

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