



# Professional Solutions for Professional Brokers

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## FormFire MHQ Quoting to Enrollment Guide

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# Important Guide Notes

This guide was last updated on **April 9, 2020**. This is the 1<sup>st</sup> version of the Broker guide for the FormFire platform.

Please note that processes explained in this guide may have changed. Refer to either the [FormFire Help Center](#) or the [Resource Center](#) for the most up-to-date information about FormFire.

**This guide is for reference only.** It's designed as a tool to supplement full training on the FormFire platform and workflows.

If you're new to FormFire, please contact our Sales Team for more information on how FormFire can support you and your Clients. Contact details below:

♦ **Sales:** [sales@formfire.com](mailto:sales@formfire.com) / [www.formfire.com](http://www.formfire.com)

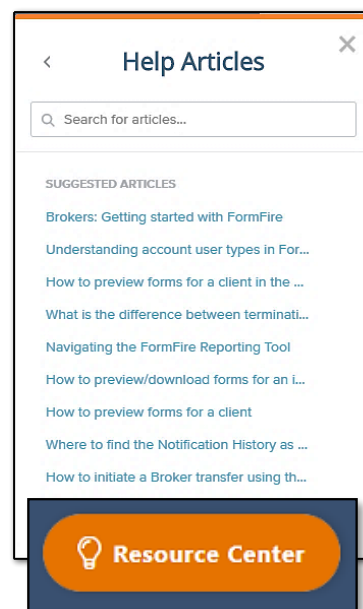
Items noted in **orange** and underlined are hyperlinks and can be clicked when the guide is viewed on a computer. The links **won't** work if the guide is printed.

If viewing a printed version of this guide, please reference the **Resource Center** in your FormFire account. The Resource Center, which houses FormFire announcements and site updates, also houses our help articles.

Simply click the Resource Center button on the bottom left-hand side of your screen and select **Help Articles**.

Need additional assistance? Consider contacting our Client Services Team. Contact details below:

♦ **Client Services:** [support@formfire.com](mailto:support@formfire.com) / [www.formfire.com](http://www.formfire.com)



# Understanding User Types in FormFire

There are several permission levels in FormFire, and each have different roles and capabilities.

## Employee

All user types begin as Employees. Employee user types only have access to the [FormFire Interview](#) where they can update their personal information and complete their insurance forms online. Every year that the Employee uses FormFire, they'd be responsible for updating their information from the past year, rather than from the beginning.

## HR Manager

HR Manager user types retain all the basic Employee user type features, but also contain additional permissions for managing the Group's information, Employees and benefits.

When HR Managers log into the [FormFire Interview](#), they're taken to the **HR Dashboard**. Here, HR Managers can update Employee information, reset Employee passwords, manage company information, share documents and generate reports.

If you're working with an HR Manager who handles multiple Clients in FormFire simultaneously, please have the HR Manager contact our [Client Service Team](#).

Employees and HR Managers don't have access to the FormFire Admin site. Access to this site is reserved for those with administrative privileges.

This includes:

- ◆ Account Executives
- ◆ Service Representatives
- ◆ Customer Administrators
- ◆ General Agency Administrators

## Account Executive/Service Representative

Account Executive and Service Representative user types are limited-access administrators in FormFire.

These user types can help a Customer Administrator with sending welcome letters, running reports, generating censuses, assigning plans and sending forms for Clients that they're assigned to in FormFire as a Team Member. Both log into FormFire through [FormFire Admin](#).

They **cannot** add Clients or view Clients they're not assigned as a Team Member in FormFire.

## Customer Administrator

Customer Administrator is the most common user type for Brokers. They have permission to view all Clients within the Agency. This user type can add Clients, set up permissions for Account Executives and Service Representatives, and access all functions for managing their Clients in FormFire. Customer Administrators log into FormFire through [FormFire Admin](#).

## General Agency Administrator

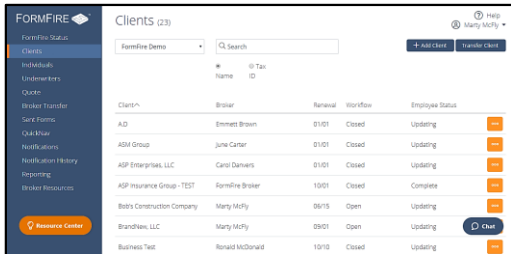
General Agency Administrator is available for two types of users:

- ◆ Those that need to see Clients associated with all brokerages that are under their General Agency umbrella
- ◆ Those within a Broker Agency with multiple locations or sub-agencies within FormFire

General Agency Administrators can access all Clients in all locations, move them between one location and another and manage all functions for its Clients, similar to Customer Administrators. General Agency Administrators log into FormFire through [FormFire Admin](#).

# Navigating the Client Dashboard

Location: Client Dashboard



Client Name	Broker	Renewal	Workflow	Employee Status
AD	Ernest Brown	01/01	Closed	Updating
AD Group	June Carter	01/01	Closed	Updating
ADP Insurance, LLC	Carol Danvers	01/01	Closed	Updating
ADP Insurance Group - TEST	FormFire Broker	10/01	Closed	Complete
Beth's Construction Company	Mary Muffy	06/15	Open	Updating
Brandview, LLC	Mary Muffy	09/01	Open	Updating
Business Test	Ronald McDonald	10/10	Closed	Updating

Once you've created your account and have the correct user type assigned, you'll log into [FormFire Admin](#). The first screen you'll see is the Client Dashboard. Here, FormFire displays the total number of Clients associated with your Agency in our system (total number will be in parenthesis) and can search for a Client by name and Tax ID.

The Client Dashboard displays the following sortable items:

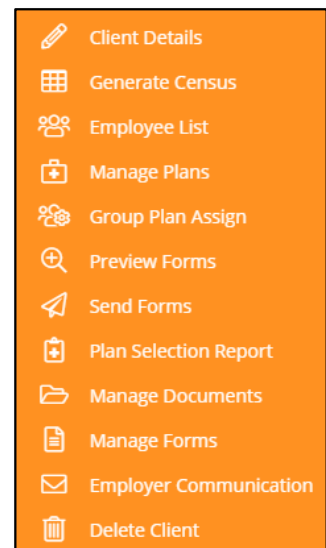
- ◆ Name of Client
- ◆ Name of main Broker (*Broker selected as Team Member 1*)
- ◆ Renewal Date (*MM/DD*)
- ◆ Workflow (*Open or Closed*)
- ◆ Employee Status (*Updating or Complete*)

You can return to the Client Dashboard at any time by clicking the **Clients** button in the blue menu at the top-left corner of the page.

Anytime an orange context menu appears in FormFire, you can click it to see additional pages available for that Client. Anytime you see a location beginning with **Location: Client Dashboard > Orange Context Menu**, you'll be using this menu.

On the Client Dashboard, the orange context menu includes:

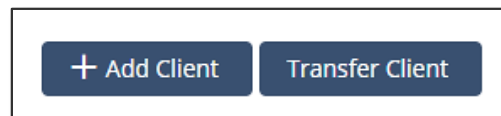
- ◆ Client Details
- ◆ Generate Census
- ◆ Employee list
- ◆ Manage Plans
- ◆ Group Plan Assign
- ◆ Preview Forms
- ◆ Send Forms
- ◆ Plan Selection Report
- ◆ Manage Documents
- ◆ Manage Forms
- ◆ Employer Communication
- ◆ Delete Client



# Getting Started: Add Client

Location: Client Dashboard > + Add Client

On the Client Dashboard, click the + Add Client button.



A slide-out menu appears, and you'll be tasked with entering in all required items. They're noted with a red asterisk \*.

## Employer Information

Location: Client Dashboard >+ Add Client > Employer Information

The first section you'll see is **Employer Information**. This is basic information on the Client. Remember, items noted with a red asterisk \* are required.

Required items include:

- ◆ Employer Name
- ◆ Tax ID
- ◆ SIC
- ◆ Group Contact Name
- ◆ Group Contact Email
- ◆ Primary Street Address
- ◆ City
- ◆ State
- ◆ Zip Code
- ◆ County
- ◆ Number of Employees

A screenshot of a web form titled 'Add New Client'. Below the title is a note: 'All fields marked with (\*) are required.' The form is divided into sections. The 'Employer Information' section contains several fields: 'Employer Name \*', 'Tax ID \*', 'SIC \* (Lookup)', 'Group Contact Name \*', 'Group Contact Phone', 'Group Contact Email \*', 'Primary Street Address \*', 'City \*', 'State \*' (a dropdown menu showing '[Select]'), 'Zip Code \*', and 'County \*' (a dropdown menu showing '[Select]'). Below these fields is a button labeled '+ Add Additional Address'. Further down, there are three dropdown menus: 'Pay Period' (showing 'Semi-monthly (24 Pay Periods)'), 'Number of Employees \*' (showing '[Select]'), and 'Continuation Eligibility' (showing '[Select]'). At the bottom, there is a section for 'Employer Options' with a checkbox labeled 'Enable Employer Group Medical Questionnaire'.

Please contact your Client  
for all required items.  
**NEVER** put fake or  
temporary information  
into FormFire!

You can also add information regarding the Client's Pay Period and Continuation Eligibility too but know that these aren't required.

## Workflow Options

**Location:** Client Dashboard > + Add Client > Workflow Options

The second section you'll see is **Workflow Options**. Here, you can customize the experience for the Employees in a Client.

You'll be asked to add the following:

- ◆ The timeframe that Employees can enter their information (*Open or Closed*)
- ◆ The workflow that's presented to Employees
  - ◆ **Pre-Screen** for quoting
  - ◆ **Plan Selection + Pre-Screen** for enrollment
- ◆ The options based on the selected workflow
- ◆ The coverage lines available to the Employees

The screenshot shows the 'Workflow Options' form. It includes fields for 'Open Date \*' (04/07/2020), 'Close Date \*' (07/06/2020), and 'Renewal Date \*' (mm/dd). There is an 'Effective Date \*' field. A 'Choose Workflow' section shows 'Pre-Screen' selected. Below this is a note: 'Note: When the dates are outside of the open-close range set above, FormFire will present a closed/QLE workflow based on your selections.' Under 'Pre-Screen Workflow Options', there are checkboxes for 'Require Employee Medical History', 'Require Employee Medical History', 'Require Employee Total Household Income', and 'Require Employee Life with Benefits'. Under 'Coverage Line Options', there are checkboxes for 'Medical' and 'Life'. A callout box on the right says: 'Open, Close & Effective Dates should be formatted as MM/DD/YYYY.'

## Broker Setup

**Location:** Client Dashboard > + Add Client > Broker Setup

The last section is **Broker Setup**.

This section allows you to select the main contact from your Agency for this the Client.

You can add up to 3 Team Members:

The screenshot shows the 'General Agent Setup' form. It includes fields for 'Name', 'Street', and 'City'. There are dropdown menus for 'State' and 'Zip'. Below this is the 'Broker Setup' section with dropdown menus for 'Team Member 1' and 'Team Member 2'. A callout box on the right says: 'General Agent Setup isn't required and can be left blank.'

- ◆ **Team Member 1** is the main contact and is required to add
- ◆ **Team Member 2** is a back up contact from your Agency with FormFire Admin access
- ◆ **Team Member 3** is back up contact or service representative from your Agency with FormFire Admin access

Once complete, click **Save** at the top of the screen. This takes you back to the Client Dashboard.



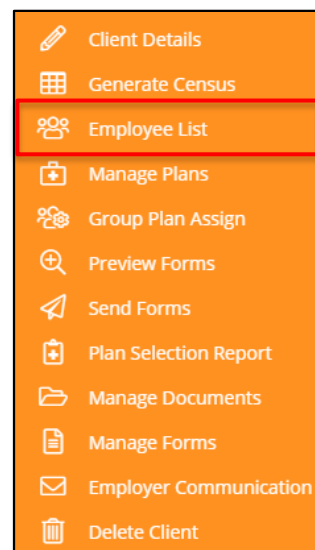
# Getting Started: Employee List

**Location:** Client Dashboard > Orange Context Menu > Employee List

After you've added the Client, you can create placeholder accounts for all the Employees.

Placeholder accounts essentially saves a space for the Employees in FormFire and are included in the total number of Employees for the Client. These accounts are noted with a status of **No Account**. You can send communication directly to these Employees too, as long as you add a valid email address!

From the Client Dashboard, click the orange context menu for the Client, and select **Employee List**. Once there, you can either manually add the placeholder accounts or use a census to load them into FormFire.



## Add Employee

**Location:** Client Dashboard > Orange Context Menu > Employee List > Add Employee

This is the manual option to add placeholder accounts. To add the Employees, click the blue **Add Employee** button on the top right-hand side of the screen. Then, select how many Employees you need to add from the **Number of Employees** drop-down menu.

Add the following items:

- ◆ SSN Last Four
- ◆ Last Name
- ◆ First Name
- ◆ DOB (*MM/DD/YYYY*)
- ◆ Email (*optional*)

A screenshot of a web form titled 'Load Census Data, BrandNew, LLC'. In the top right corner, there is a 'Help' icon and a user profile for 'Marty McFly'. The form has a section labeled 'Number of Employees' with a dropdown menu currently set to '1'. Below this, there are five input fields: 'SSN Last Four', 'Last Name', 'First Name', 'DOB' (with a placeholder 'MM/DD/YYYY'), and 'Email'. At the bottom left of the form is a blue button labeled 'Save Employees'.

Lastly, click **Save Employees** to complete the manual option.

# Upload Census

**Location:** Client Dashboard > Orange Context Menu > Employee List > Upload Census

This is the census option to add placeholder accounts. Click the blue **Upload Census** button on the top right-hand side of the screen.

Once on the screen, click the **Download Excel Preloading Template** button to generate the census.

Add all items required to complete the census. These items include:

- ◆ SSN Last Four
- ◆ Last Name
- ◆ First Name
- ◆ Email (*optional*)

Start adding the information on Column 4, Row B.

Validation Message	Last 4 of SSN*	First Name*	Middle Initial	Last Name*	DOB	Email
	####				mm/dd/yyyy	<a href="mailto:test@testmail.com">test@testmail.com</a>
OK	1234	Adam		Andrews		<a href="mailto:test@testmail.com">test@testmail.com</a>
OK	5647	Beth		Bauers		<a href="mailto:test@testmail.com">test@testmail.com</a>
OK	9761	Carol		Conners		<a href="mailto:test@testmail.com">test@testmail.com</a>

Save the complete census on your computer. Then, on the **Load Census File** page, you'll do the following:

- ◆ Click **Choose File**
- ◆ Find the file from it was saved and click **Open**
- ◆ Click **Upload Preloading Template**

Review all Employees added and then click **Apply Census Data** button. Then, all Employees will be visible on the Employee List page.

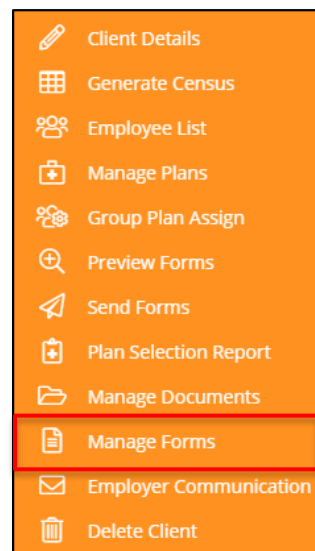
Pre-load Employee Status, BrandNew, LLC		
<b>All Records</b> Apply Census Data Upload New Census File  <b>Selected Record (None)</b>	Validation Message	First
	Ok	Andrews
	Ok	Bauers
	Ok	Conners

# Getting Started: Manage Forms

**Location:** Client Dashboard > Orange Context Menu > Manage Forms

Adding forms to a Client allows the Employees to preview the information they added in FormFire on an actual insurance form. This allows the Employee to review the information before they add their electronic signature.

From the Client Dashboard, click the orange context menu for the Client, and select **Manage Forms**. Once there, you can add the Employee and Employer forms.

The screenshot shows the 'Manage Forms' interface. It has two main sections: 'Employee Form' and 'Employer Form'. Each section has a heading, a sub-instruction, and a table. The 'Employee Form' section includes a table with columns 'Form Name', 'Carrier', 'Use for QLE changes', and 'Remove'. Below the table is a '+ Add Form' button. The 'Employer Form' section has a similar table with columns 'Form Name', 'Carrier', and 'Remove', and also a '+ Add Form' button.

Forms with a prepended "~" won't have medical conditions mapped and alphabetically appear first.

Simply click the **+ Add Form** button to add the appropriate amount of form drop-down menus needed. Forms are listed in alphabetical order by Carrier, then by size and state.

Once you've added all forms, make sure to click **Save**.

You can always adjust the amount of forms or forms visible to the Employees in this section, just make sure that you remember to save any changes you make.

# Getting Started: Employer Communication

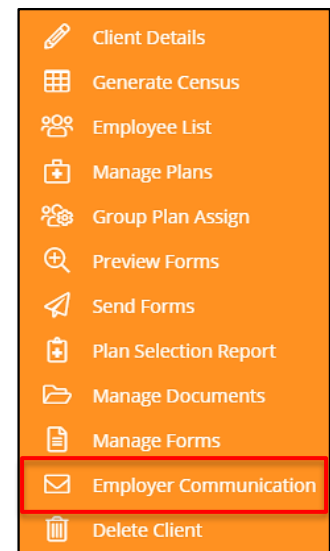
**Location:** Client Dashboard > Orange Context Menu > Employer Communication

Now that your Client has been added, it's time to invite the Employees and the HR Manager to create their accounts in FormFire.

**Employer Communication** is a tool created by FormFire that allows you to send direct communication to Employees and HR Managers. The following letter options are available:

- ◆ Welcome Letter
- ◆ Welcome Back Letter
- ◆ Application Reminder Letter
- ◆ Account Creation Reminder Letter

From the Client Dashboard, click the orange context menu for the Client, and select **Employer Communication**.



Send Employer Communication

Type of Letter:  
Welcome Letter ▼

Recipient:  
HR Only ▼

Name:

Email:

In the **Send Employer Communication** pop-up, select **Welcome Letter** as the letter type.

Then select either **HR Only** (if you don't have the Employees' email addresses) or **Employees and HR** (if you do) in the **Recipient** drop-down menu.

Once you make your selection, enter in the name and email address of the HR Manager for the Client in the text boxes, then click **Send**.

Want to see the HR version of the letter? Add your name and email address instead!

# Preparing for the Prescreen

Once the Employees have started to create their accounts in FormFire, you can begin preparing the Client for the Prescreen submission.

## Add Underwriters

**Location:** Client Dashboard > Blue Admin Menu > Underwriters

You can save contact information for all your Carrier representatives in your FormFire account. This saves you time when sending forms for either a Prescreen or Sold Group submission.

Select **Underwriters** from the Admin menu, on the left-hand side of the screen. Click the **+ Add Underwriter** button on the top right-hand side of your screen and add the following items:

- ◆ Last Name
- ◆ First Name
- ◆ Carrier
- ◆ Email

Just like adding contacts in your phone or personal email, these contacts are only available to you on your account. Make sure to click **Save!**

FormFire recommends creating a Default Password. Passwords should contain a minimum of 8 characters and provided to your contact **OUTSIDE** of FormFire.

## Employee List

**Location:** Client Dashboard > Orange Context Menu > Employee List

Check the status of the Employees from the Employee List page. In order for any submission to be started, all Employees must have a status of **Complete**. If an Employee has a status of either Updating, Not Started or No Account, you'll need to send reminder letters.

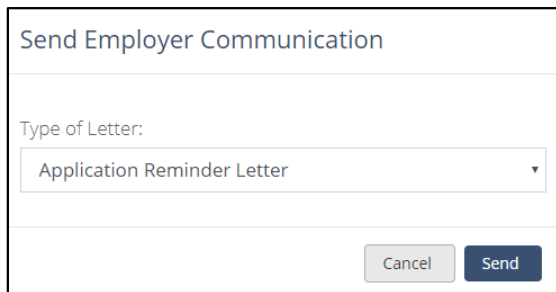
Employees **MUST** have a valid email address assigned for you to send the reminder letters!

## Reminder Letters

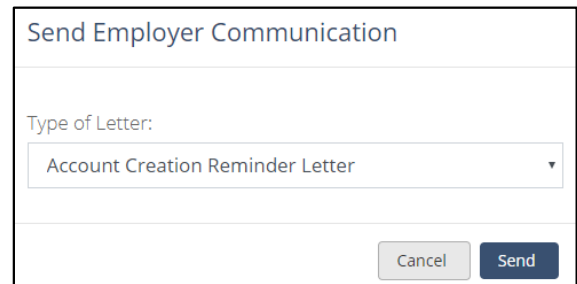
**Location:** Client Dashboard > Orange Context Menu > Employer Communication

For Employees that are not listed as **Complete**, you can send them reminder letters to encourage that they complete their accounts online.

Those with Updating or Not Started statuses, send the **Application Reminder Letter**. This letter will be sent either English or Spanish, depending on the Employee's language preference in the account.



A dialog box titled "Send Employer Communication". It contains a dropdown menu labeled "Type of Letter:" with "Application Reminder Letter" selected. At the bottom right are "Cancel" and "Send" buttons.



A dialog box titled "Send Employer Communication". It contains a dropdown menu labeled "Type of Letter:" with "Account Creation Reminder Letter" selected. At the bottom right are "Cancel" and "Send" buttons.

Those with a No Account status, send the **Account Creation Reminder Letter**. The letter, sent in English, includes the Employer Code and account creation link needed for the Employees to create their accounts online.

## Preview Forms

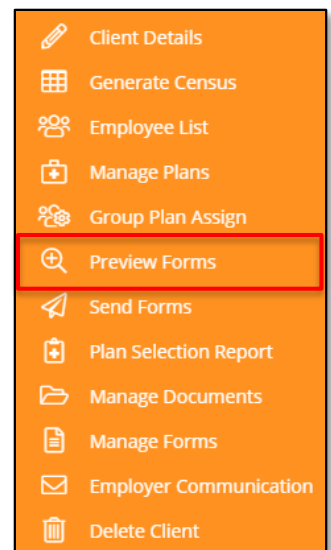
**Location:** Client Dashboard > Orange Context Menu > Preview Forms

**Preview Forms** allows you to review the Employee's information on a specific form to ensure all information is mapping correctly.

You can search for the forms you'd like to preview in a few ways:

- ◆ Choose the type of form (*Medical, Ancillary, etc.*)
- ◆ Search for a specific Carrier
- ◆ Enter part or the full name of a specific form

Forms with a prepended  
"~" won't have medical  
conditions mapped



# Sending the Prescreen

**Location:** Client Dashboard > Orange Context Menu > Send Forms

When the Client is complete, you're ready to send the Prescreen to the Carrier or Carriers of your choice. From the Client Dashboard, click the orange context menu for the Client, and select **Send Forms**.

For the submission, select the following:

- ◆ **Submission Type**, select **Prescreen**
- ◆ **Carrier** for the current submission
- ◆ **Form** for the current submission

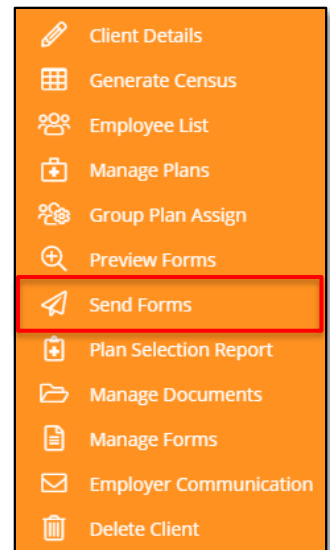
Next, ensure that the correct coverage lines are turned on for the current submission in **Coverage Lines to Include**. Those with a checkmark ✓ will be included in the current submission.

In **Note for Carrier**, add any information you feel the Carrier should know about your Client. This could be anything from amount of plans to specific types of plans (EX: HSA) that the Client is looking to have.

As you already entered your Carrier's contact information in the Underwriters page, simply select it from the **Recipient** drop-down menu. Then, click the orange Send Forms button on the bottom left-hand side of the screen.

Review the information listed in the **Confirm Send Forms** pop-up screen and click **Send Forms**.

The Carrier reviews the information sent and will contact you outside of FormFire with the official quote documentation.



If you need to do more than one submission, repeat the steps in this section until all submissions are complete.

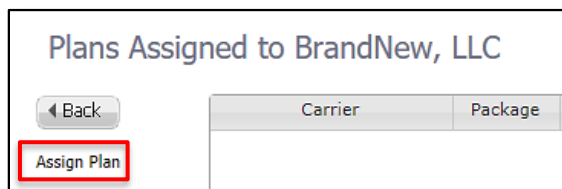
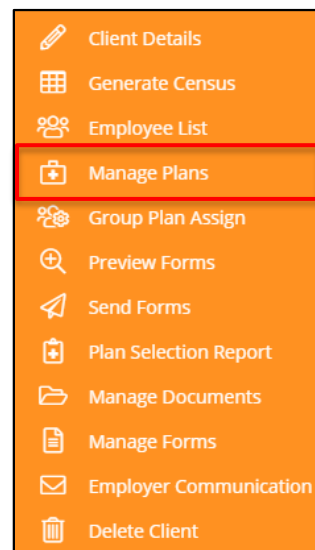
# Assigning Plans to a Client

After the Carrier or Carriers have provided you with all the official quotes and you've reviewed them with your contact at the Client, it's time to add the selected plan(s) in FormFire.

## Select a plan

**Location:** Client Dashboard > Orange Context Menu > Manage Plans > Assign Plan

From the Client Dashboard, open the orange context menu and select **Manage Plans**.



To add the new plan, select **Assign Plan** under the **Back** button. The, a pop-up menu will appear in the center of the screen.

Use any of the filters to find desired plan. Check the drop-down menu in case there are multiple prescription options to choose from.

A screenshot of a 'Select plan to assign' pop-up menu. It contains a table with columns for Carrier, Package, Coverage, Plan, Rx Option, SOB, and SBC. The table lists various insurance plans from carriers like Aetna, Anthem, and Blue Cross Blue Shield. A search filter 'x' is visible in the Carrier column. The bottom right corner of the pop-up shows 'View 1 - 20 of 485'.

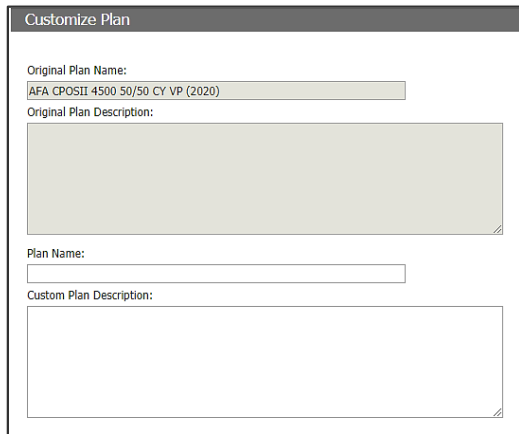
It's important to note that you can only add **one plan at a time!**

When you find the plan that you are looking for, select the plan and click **Next**.



## Customize a plan

**Location:** Assign Plan > Customize Plan



On the **Customize Plan** page, you can add the custom name (like 'Base Plan' or 'Buy Up Plan') and description for the plan.

The customized name and description only appear on the Employee's page, not on the actual form that is sent to the Carrier.

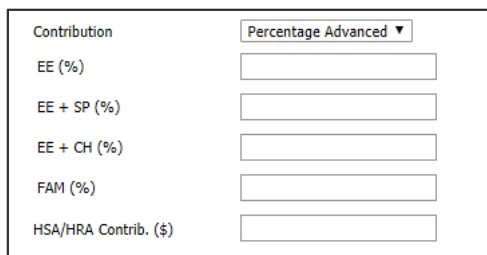
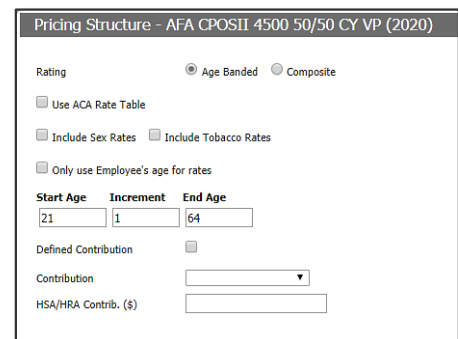
This section is optional and can be used to provide the Employees with more information on the plan itself. To continue, click **Next**.

## Pricing Structure

**Location:** Assign Plan > Customize Plan > Pricing Structure

On the **Pricing Structure** page, enter in the plan's rating as well as the Employer's contribution to the cost of the plan.

Select either **Age Banded** or **Composite** for the rating of the specific plan.



Then, select the **Employer Contribution** towards the cost of the plan from the following 4 options:

- ◆ Dollar
- ◆ Percentage
- ◆ Dollar Advanced
- ◆ Percentage Advanced

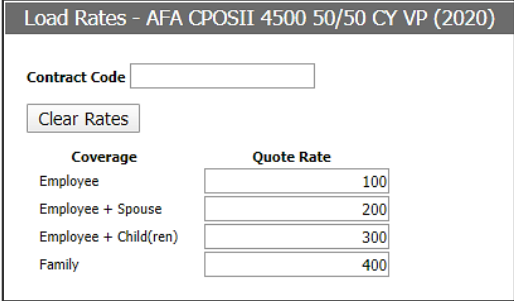
Enter in the value for the Employer Contribution, the symbol is already included for you on the left-hand side of the screen. To continue, click **Next**.

## Load Rates

**Location:** Assign Plan > Customize Plan > Pricing Structure > Load Rates

Finally, on the **Load Rates** page, add in the Quote Rate (premiums) without any deductions that the Carrier provided and click **Finish** to complete.

Repeat this process for all plans that need to be added.



Load Rates - AFA CPOSII 4500 50/50 CY VP (2020)

Contract Code

Coverage	Quote Rate
Employee	<input type="text" value="100"/>
Employee + Spouse	<input type="text" value="200"/>
Employee + Child(ren)	<input type="text" value="300"/>
Family	<input type="text" value="400"/>

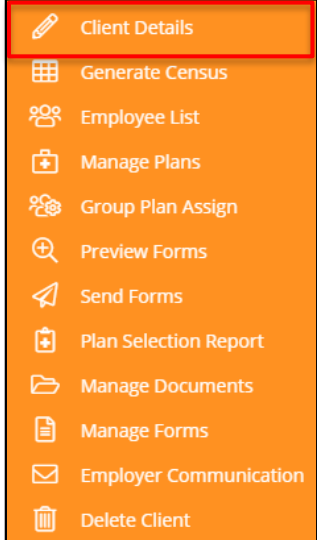
## Turn on selection process

**Location:** Client Dashboard > Orange Context Menu > Client Details

When all plans have been assigned, it's time to make them visible to the Employees in FormFire.


From the Client Dashboard, click the orange context menu for the Client, and select **Client Details**. Ensure the following items are selected and accurate:

- ◆ Pay Period
- ◆ Open & Close Dates
- ◆ **Plan Selection + Pre-Screen** selected under Choose Workflow



- ☒ Client Details
- ☐ Generate Census
- ☐ Employee List
- ☐ Manage Plans
- ☐ Group Plan Assign
- ☐ Preview Forms
- ☐ Send Forms
- ☐ Plan Selection Report
- ☐ Manage Documents
- ☐ Manage Forms
- ☐ Employer Communication
- ☐ Delete Client

Make sure the Plan Selection + Pre-Screen button is blue!



Choose Workflow

Once you've reviewed and saved any changes on the Client Details page, the Plan Selection process can begin.

# Plan Selection

FormFire offers two (2) options for the Plan Selection process to occur. Please review the options below and use each on a Client by Client basis.

## Option 1: Employee selects plans themselves

The first option is to have the Employees select the plan in their accounts.

Employees will be listed as **Not Started** on the Employee List page, allowing for better tracking of the Plan Selection process!

FormFire recommends changing the Open Date to the first day you want Employees to select and the Close Date to a few days to a week in the future. As you know your Clients better than anyone else, you can give them as long as you feel they'd need to select their plans.

## Option 2: Broker selects plan(s) on an Employee's behalf

If the Client is only offering one (1) plan to the Employees or you know the plan(s) that each Employee will be selecting, you can use the second option- Group Plan Assign.

Our next section will walk you through the Group Plan Assign process.

If you don't know the plan selections for all Employees – please use Option 1 instead!

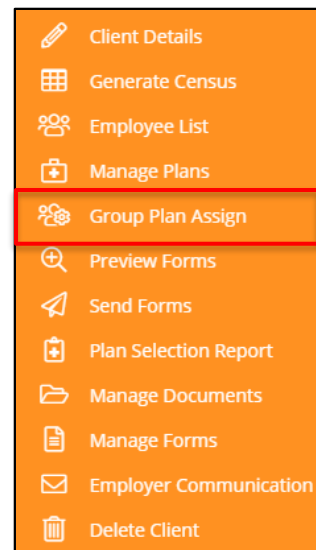
# Group Plan Assign

**Location:** Client Dashboard > Orange Context Menu > Group Plan Assign

After you've completed the assigning all plans for your Client, you'll return to the Client Dashboard and can start the Group Plan Assign process.

To begin, locate the Client on the Client Dashboard and select **Group Plan Assign** from the drop-down menu.

Once here, you'll see tabs for all coverage lines available. Make sure to click each tab so that you can assign the plans for those lines on the Employee accounts too!

A form titled "Assign to Employees". It contains a table with two columns: a checkbox column and a "Last Name" column. The first row has a checked checkbox and the name "Anderson". The second row has a checked checkbox and the name "Bagshot". The third row has a checked checkbox and the name "Brown". The fourth row has a checked checkbox and the name "Grissom". The fifth row has a checked checkbox and the name "Jambor". The sixth row has a checked checkbox and the name "Jones". The seventh row has an unchecked checkbox and the name "Jones".

Under **Assign to Employees**, check the box by the Last Name column to assign the plan to all Employees who aren't waiving coverage.

If you have multiple plans for the same Coverage Line, you'll need to select which plan you are assigning and assign it to the specific Employees taking that plan.

After a plan has been added, FormFire displays the plan assigned to all the Employees with completed FormFire accounts who are not waiving coverage.

When the plan(s) are assigned to the Employees, select the orange **Complete Plan Assignment** button.

Then the **Confirmation Notice** appears on the screen. Read the notice and select **Complete** or **Cancel** to return to the previous screen.

Once the plan assignment is complete, you'll return to the Client Dashboard and you can prepare for the Sold Group submission.

You must click **Complete** to agree to finish the Group Plan Assign process!

# Preparing for the Sold Group

After the Plan Selection process is complete, you can begin preparing the Client for the Sold Group submission.

## Add Underwriters

**Location:** Client Dashboard > Blue Admin Menu > Underwriters

Just as with your Prescreen preparation, you can save contact information for all your Carrier representatives in your FormFire account for your Sold Group submissions.

If you haven't added your Sold Group contacts already, select **Underwriters** from the Admin menu on the left-hand side of the screen. Click the **+ Add Underwriter** button on the top right-hand side of your screen and add the following items:

- ◆ Last Name
- ◆ First Name
- ◆ Carrier
- ◆ Email

FormFire recommends creating a default password. Passwords should contain a minimum of 8 characters and provided to your contact **OUTSIDE** of FormFire.

## Employee List

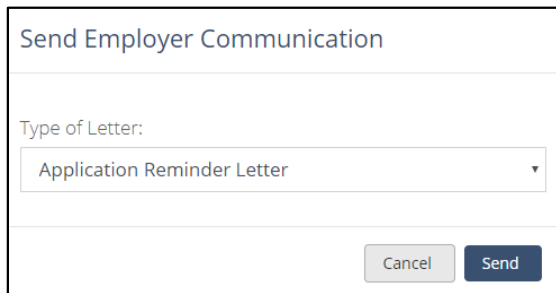
**Location:** Client Dashboard > Orange Context Menu > Employee List

Check the status of the Employees from the Employee List page. In order for any submission to be started, all Employees must have a status of **Complete**. If an Employee has a status of either Updating or Not Started, you'll need to send reminder letters.

It's always a great idea to check the Employees' statuses, even if you used Group Plan Assign!

## Reminder Letters

**Location:** Client Dashboard > Orange Context Menu > Employer Communication

A dialog box titled "Send Employer Communication". It contains a dropdown menu labeled "Type of Letter:" with "Application Reminder Letter" selected. At the bottom right are "Cancel" and "Send" buttons.

Just as with your Prescreen preparation, you can send Reminder letters to Employees. The **Application Reminder Letter** should be used for accounts with either an Updating or Not Started status. Remember, this letter will be sent either English or Spanish, depending on the Employee's language preference in the account.

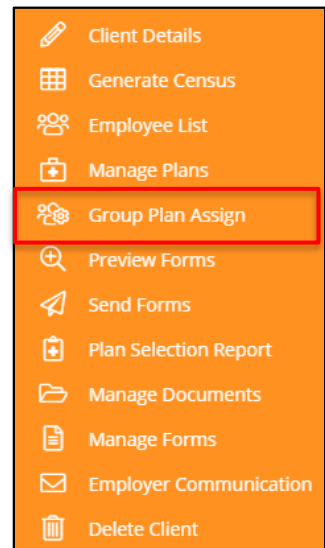
## Document Center

**Location:** Client Dashboard > Orange Context Menu > Manage Documents

The Document Center allows Brokers and HR Managers to store and share files securely within the FormFire system. If you need documents from the HR Manager, you can request the document from the HR Manager here too!

From the Client Dashboard, click the orange context menu for the Client, and select **Manage Documents**. You'll have two options:

- ◆ **+ Add Document:** Add an item directly from your computer
- ◆ **Request Document:** Request an item from the HR Manager

Two buttons side-by-side: "+ Add Document" and "Request Document".

Items added to the **Document Center** will be available to add on the **Send Forms** page.

Items added in the Document Center can be visible to yourself, to the HR Manager as well as Employees (if the item is relative to them!)

## Preview Forms

**Location:** Client Dashboard > Orange Context Menu > Preview Forms

Just as with your Prescreen preparation, you can utilize the **Preview Forms** page to review the Employee's information on a specific form to ensure all information is mapping correctly.

You can search for the forms you'd like to preview in a few ways:

- ◆ Choose the type of form (*Medical, Ancillary, etc.*)
- ◆ Search for a specific Carrier
- ◆ Enter part or the full name of a specific form

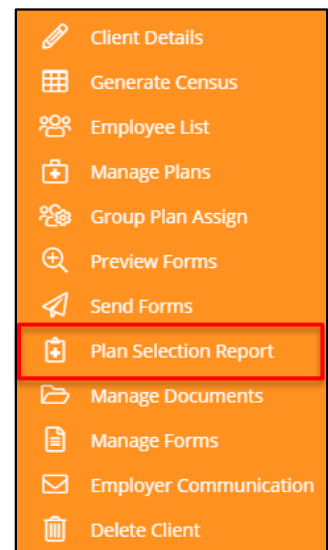
Forms with a prepended "~" won't have medical conditions mapped and alphabetically appear first.

## Plan Selection Report

**Location:** Client Dashboard > Orange Context Menu > Plan Selection Report

FormFire provides Brokers with the ability to download a **Plan Selection Report**. This excel file shows:

- ◆ Employee plan selections
  - ◆ Cost per coverage line selected
  - ◆ Total cost per Employee for all selected coverage lines
  - ◆ Name of each Plan selected
  - ◆ Tier the Employee falls under
  - ◆ Carrier each coverage line is associated with
- ◆ Employer's contribution
  - ◆ Per coverage line selected by each Employee
  - ◆ Total contributions per Employee



# Sending the Sold Group

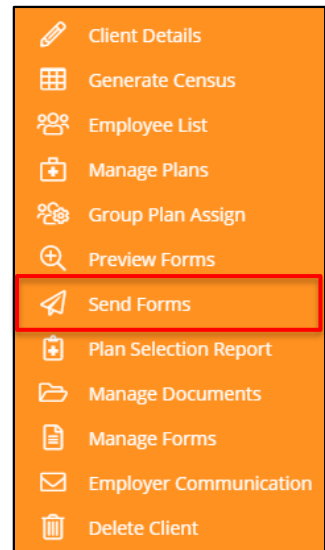
**Location:** Client Dashboard > Orange Context Menu > Send Forms

When the Client is complete, you're ready to send the Sold Group to the Carrier or Carriers of your choice. From the Client Dashboard, click the orange context menu for the Client, and select **Send Forms**.

For the submission, select the following:

- ◆ **Submission Type**, select **Sold Group**
- ◆ **Carrier** for the current submission
- ◆ **Form** for the current submission

Next, ensure that the correct coverage lines are turned on for the current submission in **Coverage Lines to Include**. Those with a checkmark ✓ will be included in the current submission.



In **Note for Carrier**, add any information you feel the Carrier should know about your Client.

In **Attach Files**, make sure that all items you'd like to include in the submission have a checkmark ✓ next to the name of the file.

As you already entered your Carrier's contact information in the Underwriters page, simply select it from the **Recipient** drop-down menu. Then, click the orange **Send Forms** button on the bottom left-hand side of the screen.

Review the information listed in the **Confirm Send Forms** pop-up screen and click **Send Forms**.

The Carrier reviews the information sent and will contact you outside of FormFire to let you know that they have enrolled your Client.

If you need to do more than one submission, repeat the steps in this section until all submissions are complete.



# FormFire FAQs

## Why is my Agency listed on my Client Dashboard?

You should already see one Client listed by the same name as your Agency on your Client Dashboard. This is called your **Base Group**. It holds all of your Broker (Admin) accounts in the Employee List.

## Can I share my username with someone else at my Agency?

For security purposes, all those under your Agency that will use FormFire **MUST** have their own accounts. Only one (1) person can be logged into FormFire per username. The best part? These accounts (Customer Admin, Account Executives and Service Representatives) are free!

## How do I add my colleagues that need to set up a FormFire account?

Your colleagues will create their accounts in FormFire in the same manner that an Employee would with an Employer Code. Once they are visible under the Employee List in the Base Group. Then, you'll give the correct permission level or user type to each of your colleagues. Want more information? View our help article titled [how to add additional Brokers to your Agency](#).

## How do I know when I can send forms for a Client?

Make sure that the Client in question is listed as **Complete** under Employee Status on your Client Dashboard. If a Client is Updating, FormFire won't allow you to send forms to any Carrier.

An updating Client means that either:

- ◆ There aren't any Employees
- ◆ The Employees are listed as placeholder accounts (*No Account*)
- ◆ The Employees are still working on their accounts (*Updating*)
- ◆ The Employees haven't started during the current timeframe (*Not Started*)

## How can I see which Employee or Employees I'm waiting on for an Updating Client?

You'll view the Employee List page for the Client. Here you can send both the Account Creation Reminder and the Application Reminder letters to Employees with either No Account, Not Started and Updating statuses.

## What if an Employee already has a FormFire account?

If an Employee already has an account with their current Employer, they don't need to create a new one. They can use the login information from before and start from where they left off the prior year. You as their Broker can provide them with their username and a temporary password if they need assistance.

However, if the Employee has an account with a prior Employer, they'll need to perform an [Employee Transfer](#) in their account.

## What do I do if I add a Client, but the Tax ID is already in use?

This means that the Client is already added into FormFire, most likely under a different Broker Agency. In order for you to gain access to this Client, you'll need to perform a Broker Transfer. A **Broker Transfer** allows an existing Client to move from one book of business to another within the FormFire system.

Both transfer options have a mandatory five (5) business days waiting period.

- ◆ If you have the Tax ID number (as entered into FormFire) or the FormFire Employer Code, you can perform the [Automated Broker Transfer](#).
- ◆ If you don't have this information, or the contact information for the Client is outdated, you'll need your contact at the Client to complete the [Online Broker Transfer Form](#).

## Why is there a mandatory five business day waiting period for Broker Transfers?

This waiting period is designed to ensure that the original Broker can complete any pending business with the Client. After the transfer is complete, the original Broker no longer has access to the Client's data. This is a courtesy that's extended to all Brokers.

# FormFire Client Services Team

## What We Can Do

Our **Client Services Team** can answer your questions through a variety of channels:

- ◆ **Conversations** while logged into the FormFire system. Use the **Chat** button in the lower right-hand corner to communicate with our Client Services Team during business hours
- ◆ **Email** [support@formfire.com](mailto:support@formfire.com) for less urgent requests, which usually are taken care of within one business day, by our Client Services Team during business hours
- ◆ **Call** 1 (216) 367-9730 when you need immediate assistance to speak directly the Client Services Team during business hours

### Business Hours:

Effective March 30, 2020  
Monday through Friday  
9AM – 5:30PM EST

We also provide 24-hour self-help resources in both in your account (the Resource Center) and in the [FormFire Help Center](#). The FormFire Help Center includes articles, step-by-step instructions and videos to answer frequently asked questions.

## What We Cannot Do

While our Client Services Team is always here to assist with general features and functions of the system, answering questions and troubleshooting when issues arise, there are some things our Team is **not** able to do. This includes:

- ◆ Advising Employees on coverage selections, Carrier requirements, Carrier policies, or how to answer medical questions
- ◆ Resetting passwords for, signing the interview on behalf of, or executing transfers of Employees without speaking directly to that Employee to obtain consent (spousal consent not permitted)
- ◆ Expediting Broker Transfers
- ◆ Sharing information for a Client under another Agency in FormFire
- ◆ Performing Broker duties for a Client, such as adding new Clients, assigning plans and/or pricing and sending forms to a Carrier

For any questions about our Client Services or clarifications of the above, please contact us at [support@formfire.com](mailto:support@formfire.com).



216-357-7400 • [www.formfire.com](http://www.formfire.com)

1100 Superior Ave. E. Ste. 1650,  
Cleveland OH, 44114