

To access the Pivot Health Broker Portal for case listing, case effective date, plan type, product description and fulfillment materials go to: <https://www.pivthealth.com/agent/admin/register>

Your Agent ID is your Pivot Health Agent writing number.

You will receive an email with a temporary password and a link to:

<https://www.pivthealth.com/agent/admin/login>

Click the link and login using your agent writing number and your temporary password.

(Hint: If you copy and paste the temporary password sent to you, please make sure there is no white on either side of the password).

You will then be prompted to create a new password. Please document your password information for future logins.

Below is what you can expect to see once logged in:

1. The order number is the first Policy number. The order date is the date the application is created.
2. Plan name, deductible, coverage maximum and fees.
3. Cost: monthly premium.
4. More than 90-day plans list multiple policies under an account.
5. You can quickly see if your client is active, pending or terminated.
 - Green = Active
 - Yellow = Pending Effective Date
 - Red = Terminated

The screenshot shows the Pivot Health Agent Portal interface. At the top, there are navigation tabs for 'PRODUCTS', 'CONTACT', and 'My Account'. A search bar on the right shows 'Order Date - 04/30/2018'. Below the search bar, it says 'Showing 1 - 3 orders found.' There are three order entries, each with a table of details. Callout 1 points to the order number 'Order #149599 (04/30/2018)'. Callout 2 points to the plan name 'Companion Economy (CLIC-STM-ECO-10000-100000)'. Callout 3 points to the cost '\$151.42'. Callout 4 points to a row in the second order's table with a yellow status dot. Callout 5 points to a row in the third order's table with a red status dot.

App ID	Name	Effective Date	Expiration Date	Cost	Status
000000	Client Name	05/04/2018	08/04/2018	\$151.42	●
000000	Client Name	05/04/2018	08/04/2018	\$59.15/mo	●
000000	Client Name	05/04/2018	08/04/2018	\$59.15/mo	●
000000	Client Name	05/04/2018	08/04/2018	\$59.15/mo	●
000000	Client Name	05/04/2018	08/04/2018	\$59.15/mo	●

Clicking on a policy period takes you to the member's fulfillment documentation including downloadable pdf of their ID card.

Fulfillment Package Includes:

- 2018 Health Insurance Tax Notice
- Enrollment Form
- Id Card
- Member FAQ
- Non-discrimination Statement
- Optional ACH Banking Form
- Policy of Insurance
- Prescription Mail Order Forms
- Privacy Policy
- Schedule of Benefits
- State Guaranty Notice

The screenshot shows the member fulfillment page for 'Wisconsin : Companion Economy Plan'. The page has a header with 'PIVOT HEALTH', 'PRODUCTS', 'CONTACT', and 'My Account'. Below the header, there is a 'Log Out' link. The main content area is titled 'Wisconsin : Companion Economy Plan' and contains several sections:

- Welcome to Pivot Health**: A welcome message with instructions on how to obtain member assistance.
- Wisconsin : Companion Economy Plan**: A summary of the plan details, including Order Date (04/30/2018), Application ID (000000), Plan ID (CLIC-STM-ECO-10000-100000), Effective Date (05/04/2018), and Expiration Date (08/01/2018).
- People Covered**: A list of covered individuals, including the Primary (Client Name) with birth date (01/23/1968).
- PLEASE NOTE**: A red-bordered box containing a note about pharmacy vendor changes and ID card updates effective May 1, 2018.
- Downloadable Documents**: A list of documents available for download, including:
 - 2018 health insurance tax notice
 - about communicating for america
 - certificate of insurance
 - enrollment form
 - id card
 - member faq