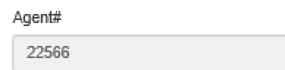
Welcome to the Group Portal User Guide

This User Guide was created to help anyone who will be dealing with the Group portal. Throughout the guide, please be aware of these references:

Here is a list of symbols that you will see in the Guide:

Delete	Phone Number
Email Address	Print
Fax	Social Media
Drop Down Menu	Settings

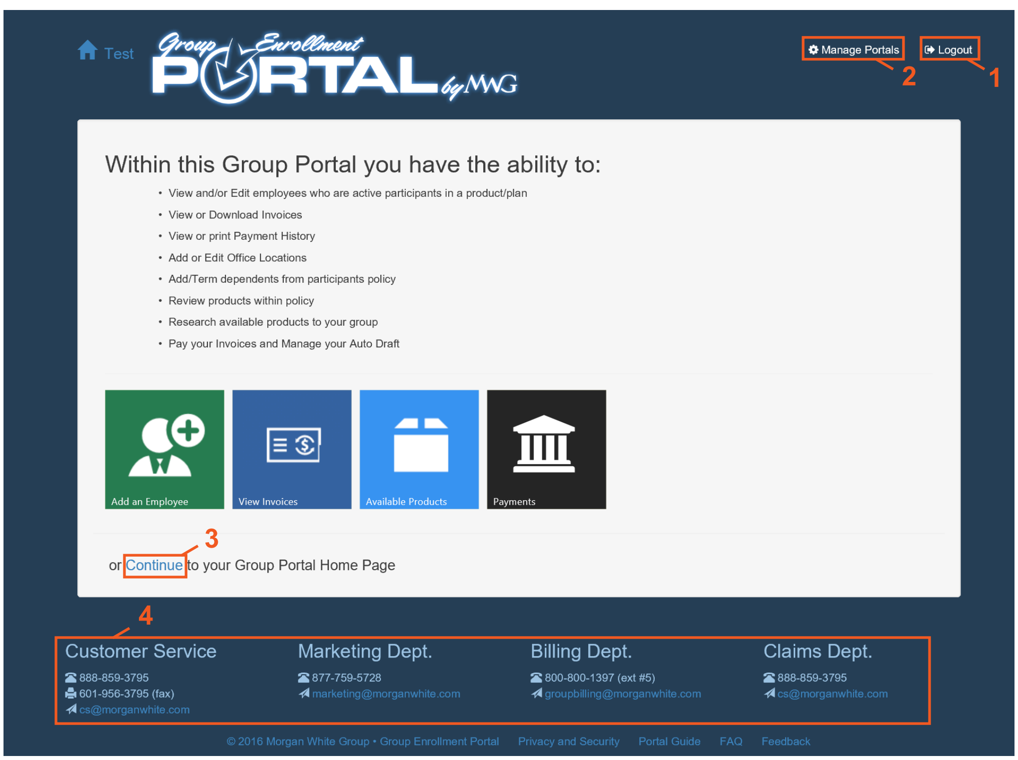
Please Note: When in the portal, you may come across boxes that are greyed-out. This indicates information that cannot be edited.



Reminder- You can access the Group Portal User Guide or FAQ at the bottom of the website at any time.

The Group Portal URL: groups.mwadmin.com (no www prior to the web address)

Upon entering the Group Portal, the first thing you will see is the landing page.
You will find several bullet points which hightlight the features available within the portal.



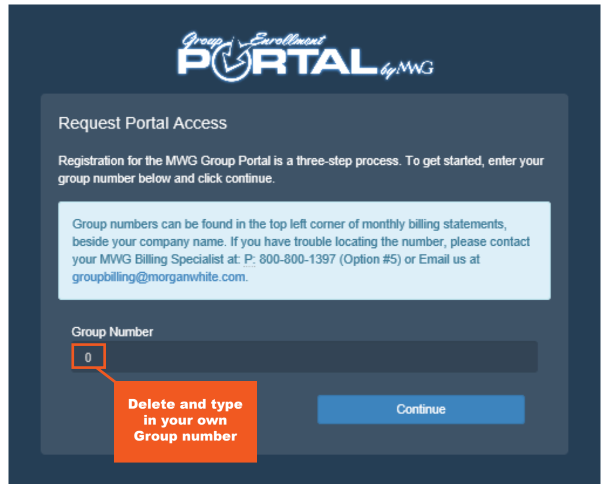
1. Logout Link-Click to log out of the portal.

2. Manage Portals- Here is where you can change your email or password.

3. Click here to enter the Broker Portal

4. Contact information

Log In Screen



Register Screen

To Register as a New User

Click "Register" in the bottom, right-hand corner of the login screen. You will be prompted to enter your group number. Enter your number and click "Continue" (The number can be found on your invoice, next to your company name. You can also call your billing specialist at 800.800.1397.)

The next screen will populate with the email address of the Group Administrator (or Super User). If this email is not correct, please contact your billing specialist. They will send you a form to be signed and faxed back authorizing the change of the Group Administrator. When you log in and register, after 12-24 hours of submitting the change form, the newly revised email address will appear. Click "Continue".

Once you click "Continue", an email from portalhelp@morganwhite.com or noreply@morganwhite.com will be sent automatically to the address listed. Check your spam/junk folder if you don't receive it right away.

Within the email, you will see the wording "Click Here to Continue Registration". This will take you to the page to create your username and password. There will also be links to the User Guide and FAQ Guide if you have any questions.

As the Group Administrator, this is where you will create you username and password for your group. If you want others to access your portal, you will set them up as a Contact within the "Contact" tab.

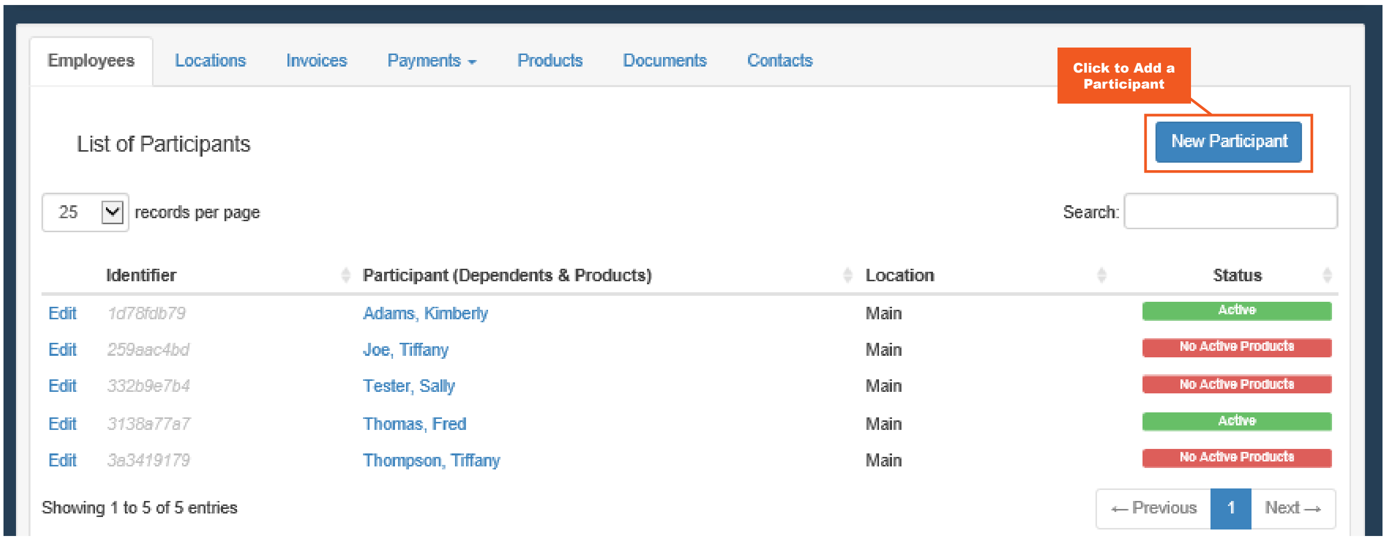
Do Not share this username or password with ANYONE as it is tied to you specifically for tracking.

Logging in as a User

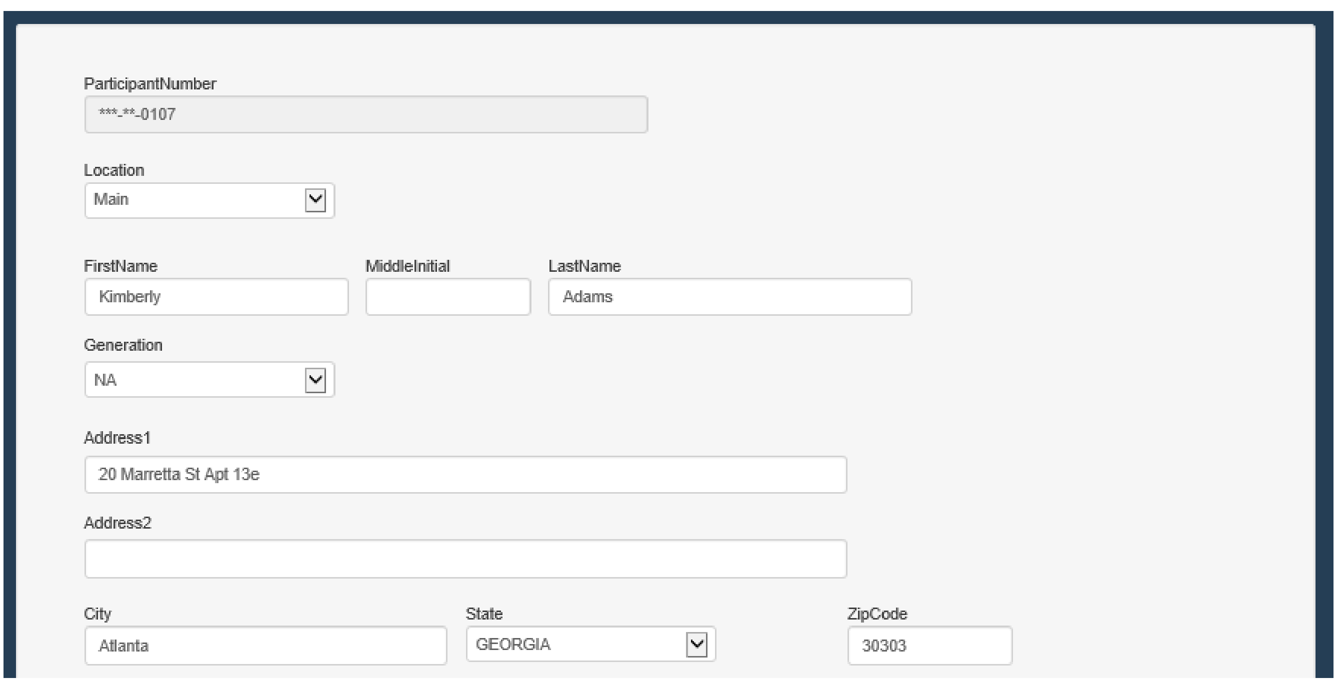
Once you have set up your username and password, you may log in with your new credentials. Please enter your username and password. Once inside the portal, you will see the landing page. Click the "Home" icon or "Continue" to enter the portal.
Please Note: Your username and password are case sensitive.

When you click the "Home" icon or "Continue", you will see seven tabs in the toolbar display. These tabs include: Employees, Locations, Invoices, Payments, Products, Documents, Contacts.

Employees Tab



Click “Edit” next to an employee’s name to make any changes. This will pop up:

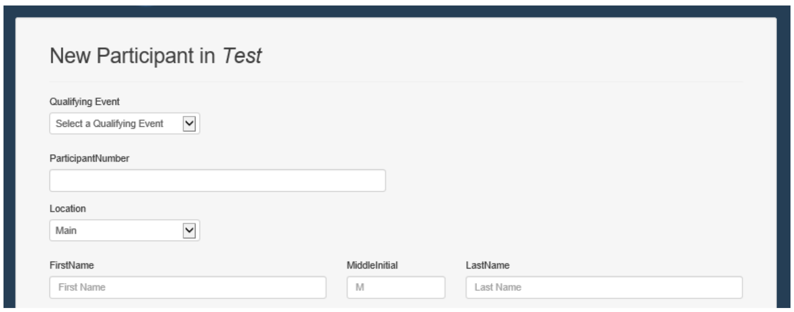


If you try to change an employee’s zip code or state, a service ticket will be issued to Customer Service so we can verify if your existing product(s) are still offered in the new area. You will be notified if there is an issue.

Employees Tab Continued

To Add a New Participant:

Click “Employees” and then “Add New Participant”. Enter the required information in the New Participant screen. Once submitted, our system will automatically issue new ID cards.

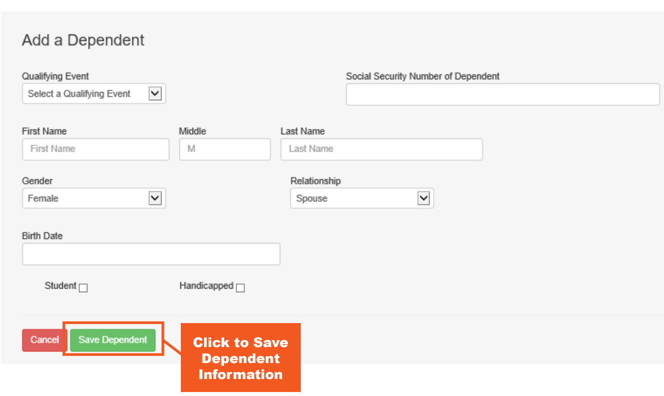


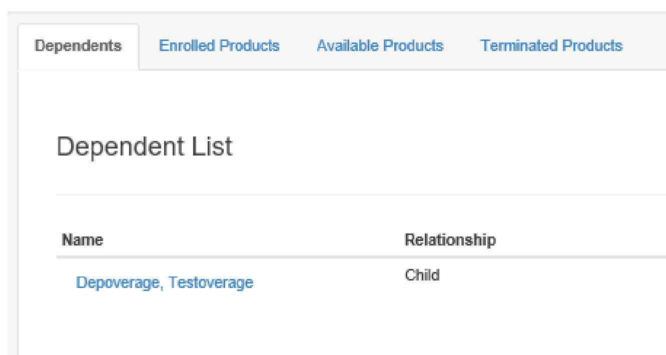
Editing Employees:

On the “Employees” tab, click a participant’s name to display 4 options for that participant.

1. Dependents for that participant
2. Enrolled products for that participant
3. Available products for that participant
4. Termination history

To add a **Dependent**, under the “Employee” tab, click on a participant’s name and select “Add a Dependent”. If you do not see this blue button, you do not have the “role” necessary to add a participant. Contact your group HR person for administration rights for adds and terminations.





Complete and submit the required information. Refresh and return to the “Home” page. When you click on the employee’s name, the dependent will be listed.

The 2nd tab under a dependent’s name is the “Enrolled Products” tab. Click it to display the product(s) the dependent is enrolled in. If desired, you can also “Terminate” a dependent on this page.

The 3rd tab is titled “Available Products”. You can view available products in which the dependent can enroll. To enroll, click the “Enroll” button on the right.

The 4th tab under the dependent options is “Terminate Products”. This screen displays the items which have been terminated to date (If applicable).

Terminating a Product

To terminate an employee or a dependent from a product they are enrolled in, follow the steps outlined below.

To Terminate an Employee:

1. Log into the portal. Click the “Home” icon by the company name and it will expand the toolbar options.
2. The “Employees” tab will list all employees in the company.
3. Click on the employee’s name in which you wish to terminate a product.
4. Once their screen openes, click “Enrolled Products” to view the active products. It will display also a green “Active” button and a red “Terminate” button.
5. Click the red “Terminate” button. You will see a calendar which will allow you to choose the 1st of the current billing month, the 1st of the following month, or the 1st of the next month.

Example: if the date you log is October 24th and you click the term button, it will show October 1st, November 1st, and December 1st as your only options to terminate. It will ask you to comfirm this termination. If you click “Terminate” in error, you must call Customer Service at 888.859.3795. Due to possible carrier restrictions, Retro Terminations are not allowed to be made on the group portal. You will need to reach out to groupaddsandchanges@morganwhite.com for consideration of a retro termination.

Please Note: MWG Administrators will not retroactively terminate a member’s coverage beyond 2 months from the month in which the request for termination is received.

To Terminate an Employee’s Dependent:

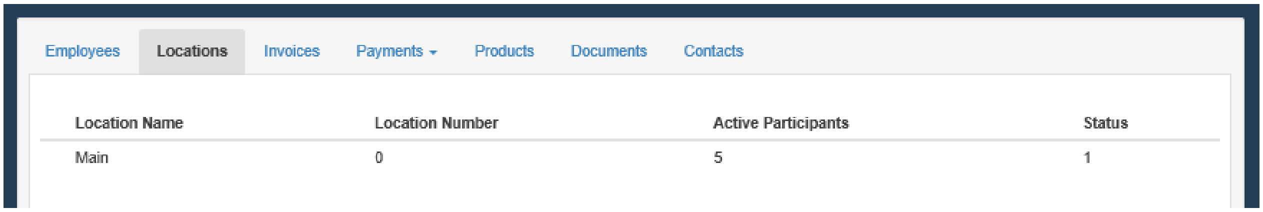
The same termination process applies to the Dependent level:

1. Log into the portal. Click the “Home” icon by the company name and it will expand the toolbar options.
2. Click on the “Employees” tab.
3. Find the employee who has the dependent you are looking to terminate and click their name.
4. Click on the “Dependents” tab.
5. Click on the name of the Dependent to terminate.
6. Click “Enrolled Products”
7. Click the red “Terminate” button. You will see a calendar which will allow you to choose the 1st of the current billing month, the 1st of the following month, or the 1st of the next month.

Example: if the date you log is October 24th and you click the term button, it will show October 1st, November 1st, and December 1st as your only options to terminate. It will ask you to comfirm this termination. If you click “Terminate” in error, you must call Customer Service at 888.859.3795. Due to possible carrier restrictions, Retro Terminations are not allowed to be made on the group portal. You will need to reach out to groupaddsandchanges@morganwhite.com for consideration of a retro termination.

Reinstate: You can re-enroll someone, however, an allowable time frame is built into the enrollment option based on carrier restrictions for terminating/enrolling. This “Enroll” button will only become active after the allotted time frame required by the carrier is satisfied. There is a 60-day from termination window on this procedure in the portal.

Locations Tab

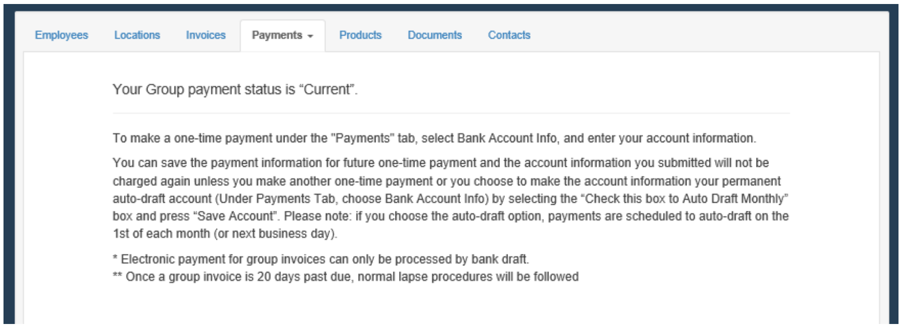


The “Locations” tab allows you to edit address information, if the group has multiple locations. If there is only one location “main”, it will not allow editing because invoices are tied to the main address. If your edit involves a change in state or zip code, a ticket will be issued to Customer Service for a follow up to ensure plans exist in those areas.

Invoices Tab

Click on the “Invoices” tab to view invoices. A Super User can click a PDF icon to generate an invoice. If there is a long list of invoices, page numbers are displayed at the bottom right hand corner of the website for navigation. You can simply click the show more entries drop-down to display more. You can also sort by various columns by using the light grey arrows in the tool bar to sort.

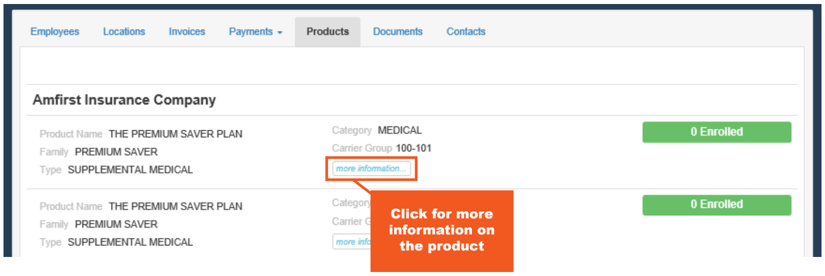
Payments Tab



Click on the “Payments” tab to view payment history. You can view more with the drop-down option or, if applicable, page numbers will be displayed on the bottom of the right hand corner. These columns can also be sorted by clicking the tiny blue arrows next to each column name.

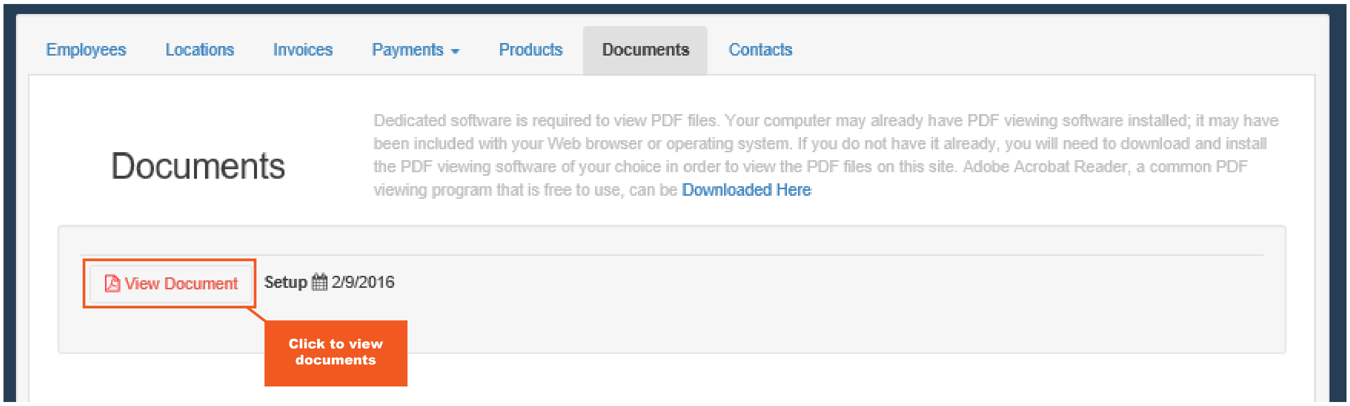
Paying an Invoice: The “Payments” tab also has a drip-down option “Bank Account”. Active groups can make a one-time payment on any open invoices or set the group up via bank account on auto draft for either the 1st or the 15th of the month. If the 1st or the 15th falls on a weekend or a holiday, the payment will be applied the next business day.

Products Tab



The “Products” tab lists products currently associated with and available to the Group. There is also an interactive numeric count as to how many participants are currently enrolled in each product listed. If the numeric number next to a product is clicked, a list will expand, containing those participants enrolled specifically in that selected product.

Documents Tab



The Documents Tab contains any documents from our company such as a lapse notice or rate increase letter.

Contacts Tab

The Group Administrator (Super User), is the only person capable of adding contacts to their group portal. As the “Super User”, you can add as many users as you would like. It is important to know, adding a contact is a two-step process. First, add the contact. Once they appear in the listing under “Contacts”, you must click on the contact you just created and grant them a role. When you click “Send Invitation”, the invitation will be sent to them automatically via email. Below are the visual steps to create a new contact in your portal.

To Create a Contact:

1. Click on the “Contacts” tab.
2. Click on “New Contact” and complete the required data.
3. Click the “Home” icon to exit.
4. Click the “Contacts” tab and the new contact will be listed.
5. Click on the contact’s name and assign a role. The list of role descriptions is located next to the role drop-down option box. There are only three roles available at this time.
6. Click “Send Invitation”.

Please Note: For tracking and historical purposes, you cannot delete a contact. However, you may REVOKE the contact’s portal usage which will instantly discontinue their username/password and access to your group portal.

We appreaciate your feedback. Any comments or technical issues which may arise can be emailed to portalhelp@morganwhite.com.