



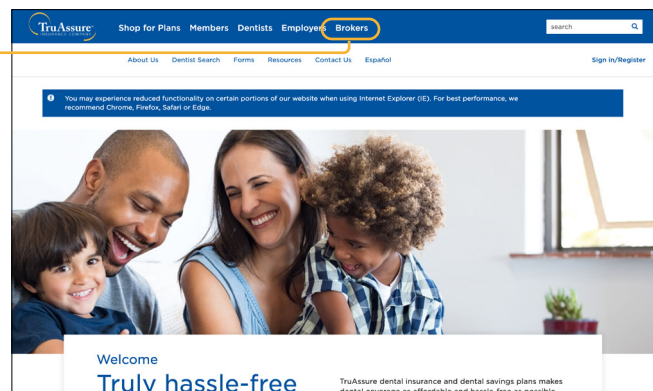
Broker Portal How-To Guide

Truly easy online administration.

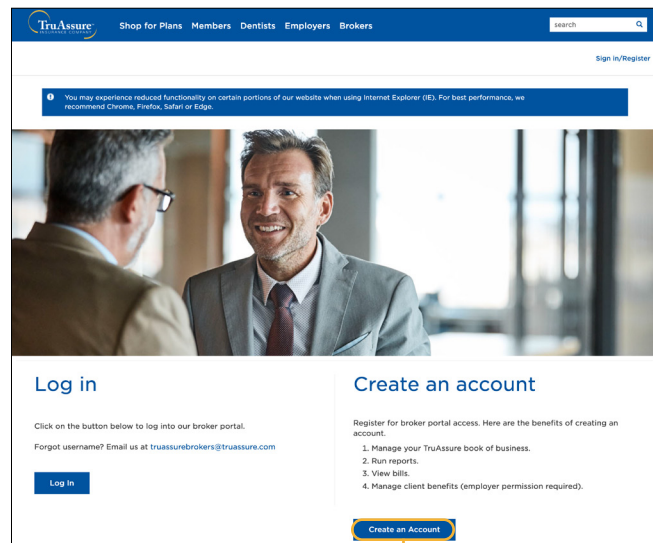
TruAssure's broker portal helps you manage your book of business with 24-hour access to group benefit summaries, bills, reports and more for your group clients (with the group's permission required).

Register for an Account

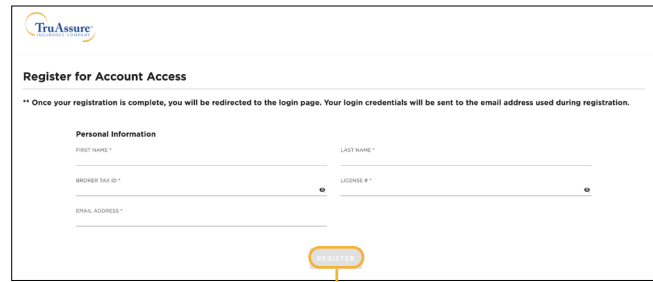
1 From [TruAssure.com](https://www.truassure.com), click [Brokers](#).



2 Click [Create an Account](#).

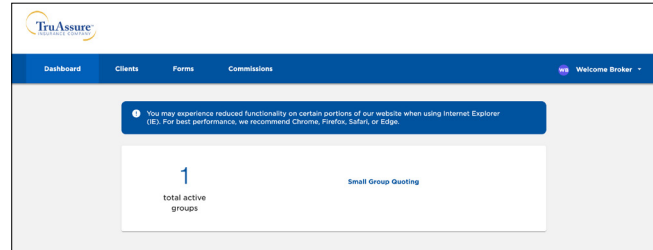


- 3 Complete the online registration. Enter your first name, last name, broker tax ID or license number and email address. Then, click [Register](#).



- 4 Following registration, you will receive an email with your username and temporary password to log in. Upon sign in, you will be prompted to update your password.

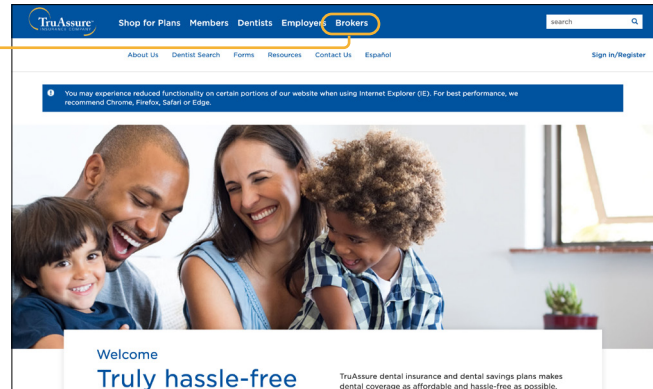
- 5 Once signed in, your secure broker dashboard will give you access to see your total number of active groups and a quick link to TruAssure’s Small Group Quoting Tool.



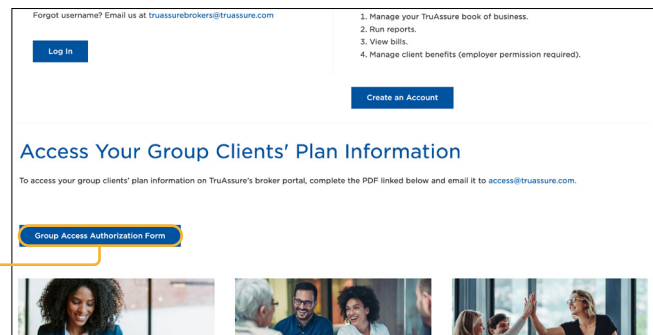
Access and Manage Your Group Clients’ Plan Information

To access and manage your group clients’ benefits and plan information on TruAssure’s broker portal, additional access will be required. To receive additional access, follow the steps below:

- 1 From [TruAssure.com](#), click [Brokers](#).



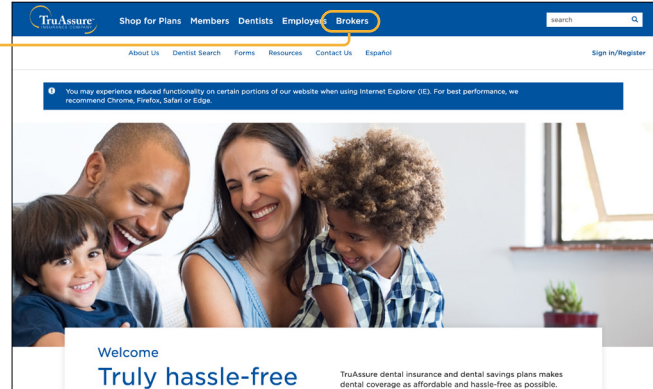
- 2 Scroll down to “Access Your Group Clients’ Plan information” and click [Group Access Authorization Form](#) to download the form.



- 3 Complete the form in its entirety (including client authorized signature) and email it to Access@TruAssure.com and you will receive the appropriate access requested. For any questions, contact the Sales Team at [844-350-4433](tel:844-350-4433).

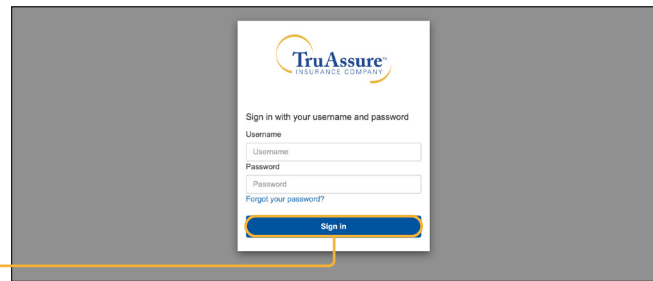
Accessing the Broker Portal

1 From [TruAssure.com](https://www.truassure.com), click [Brokers](#).

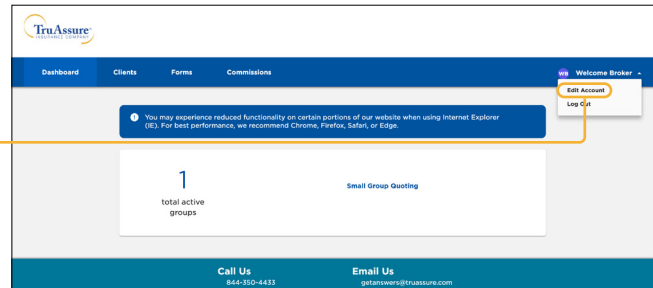


2 Click [Log In](#). You will be redirected to a login page.

3 Enter your username and password and click [Sign In](#).



4 You may change your password by clicking on the dropdown arrow next to your name and clicking [Edit Account](#).

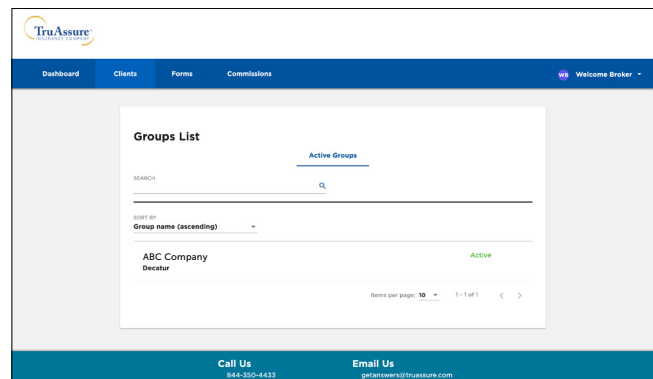


Manage your TruAssure Book of Business

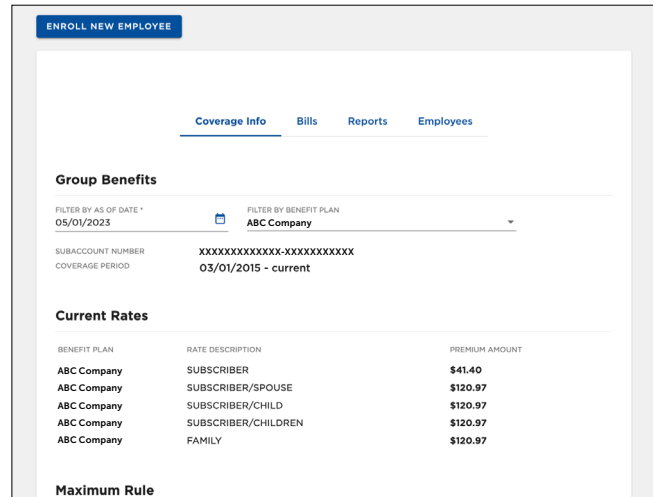
If you have administrator access* for a client, you can manage their benefits and eligibility under the [Clients tab](#), in addition to bills and reports.

Coverage Information*

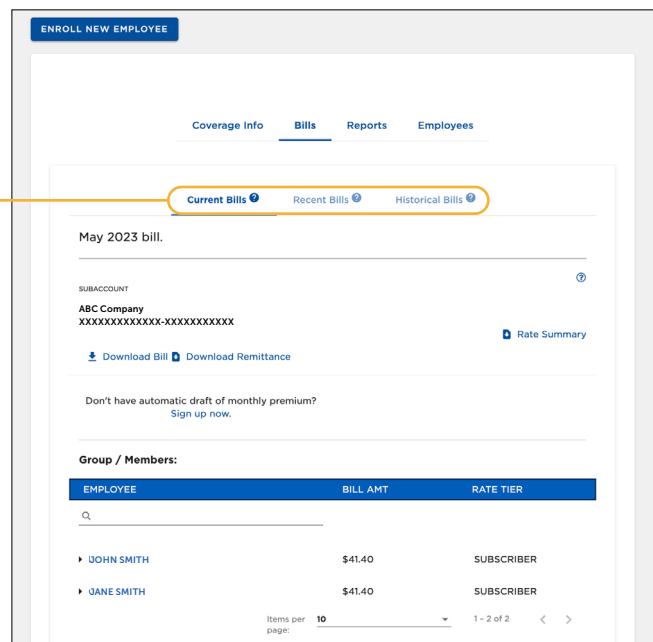
1 To manage your clients' coverage, click on the [Clients tab](#). Click on a group or individual's name to view their benefits.



- 2 Scroll down to [Group Benefits](#) to view the coverage information and rates.
- 3 Benefit details for that sublocation will appear. On this page, you will also be able to view bills, reports and manage employees.
- 4 Filter by date or benefit plan to view coverage information for different benefit years and/or benefit plans.



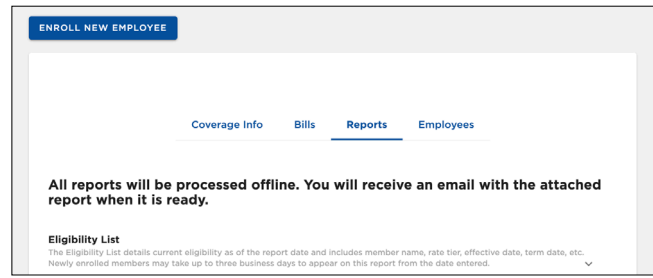
- 5 To view recent bills, click [Bills](#). A list of current bills will be displayed.
- 6 To view bills for a previous month, click [Recent Bills](#). Click [Download Bill](#) or [Rate Summary](#) for more information.



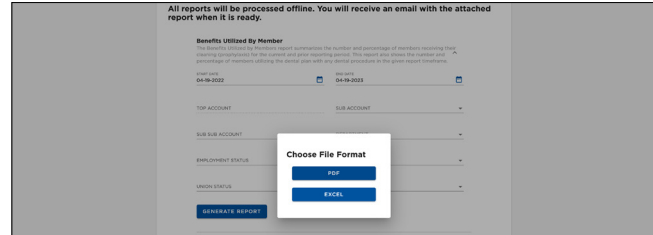
Reports*

- 1 To run a report, click [Reports](#).
- 2 Click the report you wish to run to expand the filter options.

- Filter the report, select the start and end date, and click [Generate Report](#).

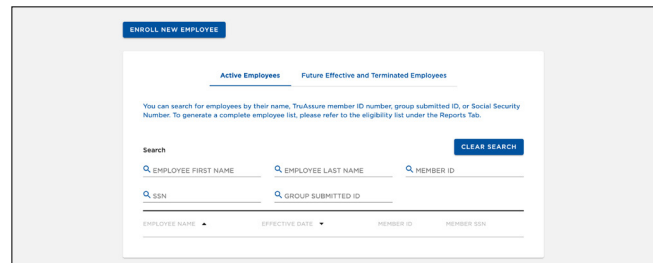


- Select to view the report in [PDF](#) or [Excel](#) format.



Member Management*

- To manage members, click [Employees](#).
- Search for [Active](#) or [Inactive](#) employees by name, member ID, or social security number. You can view, print and email the employee's ID card.

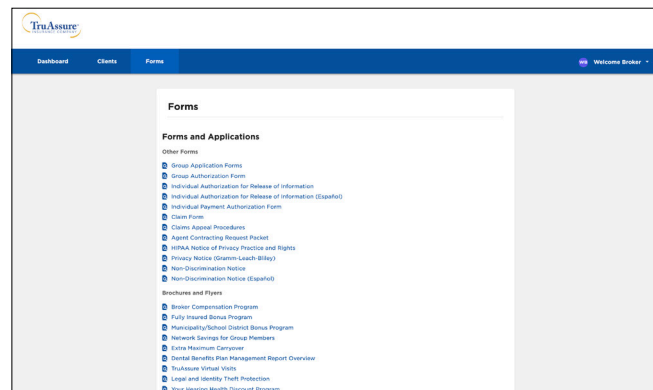


- You can also enroll, terminate and reinstate employees and dependents.

*If you do not have access to manage a group's benefits, complete the [Group Portal Access Authorization form](#) located on the [TruAssure.com](#) broker page and submit the form in its entirety (including client authorized signature) to TruAssure via email at Access@TruAssure.com.

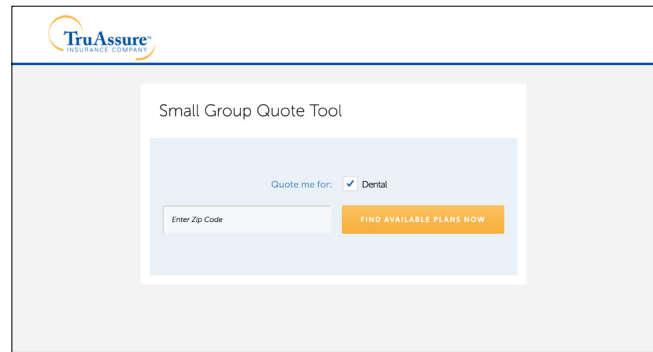
Access Additional Resources

In the portal, you can access additional resources by clicking on the [Forms](#) tab to find forms and brochures to help you sell. You can also visit the Broker resource page on [TruAssure.com](#) to access more helpful tools.



Small Group Quoting Tool

You can quote small groups on TruAssure.com without logging in. You can also access the small group quoting tool on your secure broker dashboard and at TruAssureQuote.com. Please see our small group quoting guide on how to quote.



The screenshot shows the TruAssure logo at the top left. Below it, the title "Small Group Quote Tool" is centered. Underneath the title, there is a section labeled "Quote me for:" with a checked checkbox next to "Dental". Below this, there is a text input field labeled "Enter Zip Code" and an orange button labeled "FIND AVAILABLE PLANS NOW".

If you have any questions or need assistance, please contact our Sales and Account management team at **844-350-4433**. If you have any questions related to registering or accessing the broker portal, email TruAssureBrokers@TruAssure.com.