

Broker Administration

1. Logging in For First Time

You will receive two emails from registration@cdphp.com. The email with the Subject Line of “Your CDPHP i * Connect User Account for Broker Administrator” will supply you user account. The email with a subject line of “Your CDPHP i * Connect Password for Broker Administrator” will supply you your password. To log in, go to this site: <https://cdphp.ikaenterprise.com/portalLogin.aspx?UserType=BROKER>.

After logging in, you will be asked to type in a secret question and answer. This information will be use to help you reset your password should you forget your password.

You will then see a screen similar to this. To Change your password, click the Change Password Link and simply type in your old password, type in a new password, and confirm the new password. Your password must have a mix of capital and lowercase letters and must include numbers as well as letters (For example, Albany23, Johnny17).

The screenshot shows a web application interface for Broker Administration. At the top, there is a navigation bar with links for "Broker", "Change Password", and "Sign Off". A callout bubble points to the "Change Password" link with the text "Click here to Change Password". Below the navigation bar is a "Broker Search Information" section with form fields for First Name, Last Name, City, State, County, and Status, along with "Search" and "Reset" buttons. Below that is a "Broker List Information" section containing a table of broker records. The table has columns for BrokerName, Address1, Address2, City, State, Status, Phone Number, UserName, and Reset Password. The bottom of the page features a purple bar with page numbers "1 2" and an "Add New" button.

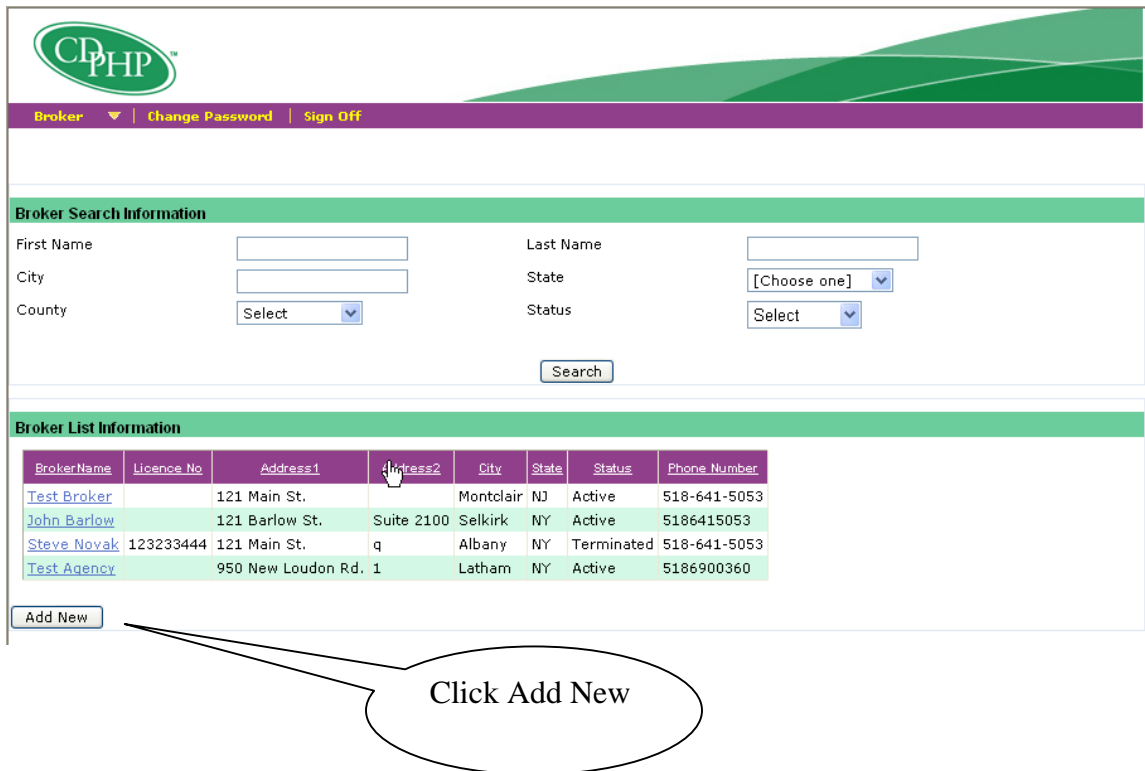
BrokerName	Address1	Address2	City	State	Status	Phone Number	UserName	Reset Password
Steve Novakadmin	121 Main St.	Suite 21000	Albany	NY	Active	518-641-5053	snovakadmin	Reset
John Newby	121 Main St.		Albany	NY	Terminated	555-555-5555	jnewby	Reset
John Barlow	121 Barlow St.		Barlow	NY	Active	518-641-5053	jbarlow	Reset
John Fobare	500 Patroon Creek Blvd.		Albany	NY	Active	518-641-5080	jfobare5	Reset
Steve Jones	121 Main St.		Montclair	NY	Active	555-555-5555	sjones	Reset
John Fobare Old	500 Patroon Creek Blvd.		Albany	NY	Active	518-641-5080	jfobare4	Reset
Ikatest Nilkatest	23	Main St	Southborough	MA	Active		iniikatest	Reset
Sue Kuba	500 Patroon Creek Blvd.		Albany	NY	Active	518-641-4558	skuba	Reset
Steve Novak	500 Patroon Creek Blvd.		Albany	NY	Active	518-641-5053	snovak	Reset
ika Broker	257 TURNPIKE RD		Southborough	MA	Active	123-123-1312	ikaBroker	Reset

2. Adding a user for your Broker Agency.

From the Broker Menu select List Brokers



You will see this screen. Click the Add New Button.



Fill in Broker Individual's Personal Information and hit the Submit button. **Make sure you enter a valid email address for each user you add.**

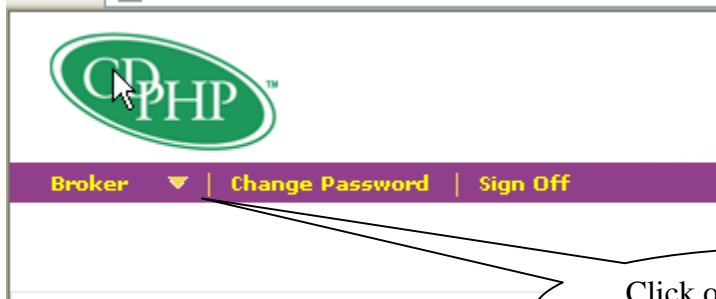
Broker ▼ Change Password Sign Off

Broker Information

First Name:	<input type="text"/>	Last Name:	<input type="text"/>
Address1:	<input type="text"/>	Address2:	<input type="text"/>
City:	<input type="text"/>	State:	[Choose one] ▼
Zipcode :	<input type="text"/>	Phone: (XXX-XXX-XXXX)	<input type="text"/>
Fax: (XXX-XXX-XXXX)	<input type="text"/>	Mobile Phone: (XXX-XXX-XXXX)	<input type="text"/>
Email Address:	<input type="text"/>		

The user you entered will then receive a username and password email from registration@cdphp.com. The user you created will by default have read/write access to all client information within CDPHP i * Connect for your Broker Agency. Refer to Number 3 on this document to learn how to hide clients from a Broker Individual.

2. To update contact information for a User



Click on Broker to choose List Brokers

You will see this screen. Click on the Broker Name to view their information.

The screenshot displays the 'Broker Search Information' form and a table of broker information. The form includes fields for First Name, Last Name, State, and Status, along with a Search button. Below the form is a table with columns for BrokerName, Licence No., Address1, Address2, City, State, Status, and Phone Number. A mouse cursor is pointing to the 'Test Broker' link in the table.

BrokerName	Licence No.	Address1	Address2	City	State	Status	Phone Number
Test Broker		121 Main St.		Montclair	NJ	Active	518-641-5053
John Barlow		121 Barlow St.	Suite 2100	Selkirk	NY	Active	5186415053
Steve Novak	123233444	121 Main St.	q	Albany	NY	Terminated	518-641-5053
Test Agency		950 New Loudon Rd.	1	Latham	NY	Active	5186900360

Below the table is an 'Add New' button.

Click Broker Name

Make any necessary changes and Click the Update Button.

Broker Information

First Name:	<input type="text" value="Test"/>	Last Name:	<input type="text" value="Broker"/>
Address1:	<input type="text" value="121 Main St."/>	Address2:	<input type="text"/>
City:	<input type="text" value="Montclair"/>	State:	<input type="text" value="New Jersey"/>
Zipcode :	<input type="text" value="07043"/>	Phone #:	<input type="text" value="518"/>
Fax #:	<input type="text" value="518-641-5005"/>	Mobile Phone #:	<input type="text"/>
Status:	<input type="text" value="Active"/>		
Email Address:	<input type="text" value="snovak@cdphp.com"/>		

Make Changes and Click Update

To deactivate a user's account from CDPHP i * Connect, change the status from Active to Terminated and click the Update Button.

Broker Information

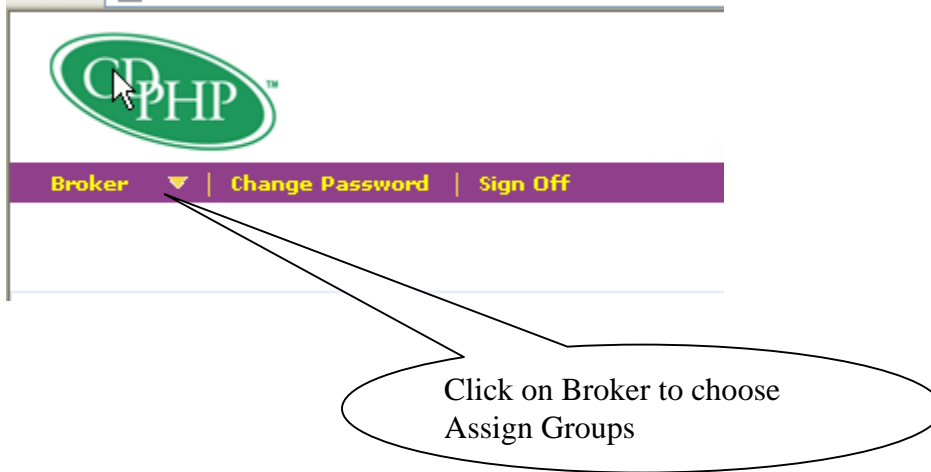
First Name:	<input type="text" value="Test"/>	Last Name:	<input type="text" value="Broker"/>
Address1:	<input type="text" value="121 Main St."/>	Address2:	<input type="text"/>
City:	<input type="text" value="Montclair"/>	State:	<input type="text"/>
Zipcode :	<input type="text" value="07043"/>	Phone #:	<input type="text"/>
Fax #:	<input type="text" value="518-641-5005"/>	Mobile Phone #:	<input type="text"/>
Status:	<input type="text" value="Terminated"/>		
Email Address:	<input type="text" value="snovak@cdphp.com"/>		

Choose Terminated

Then Click Update

3. To hide a client from a User

From the Broker Menu select Assign Groups



You will see a screen like this. You can search for a specific Client by typing in the Client name or you can search for all clients that a particular User has access to by selecting that User from the Broker Name dropdown.

Search Criteria

Client Name:

Effective Date From: (MM/DD/YYYY)

Created Date From: (MM/DD/YYYY)

Plan Name:

County:

Application Type: Paper Electronic Both

Group Number:

Effective Date To: (MM/DD/YYYY)

Created Date To: (MM/DD/YYYY)

Option:

Proposal Status:

Broker Name:

Deallocate proposals To:

Search Results

	PDF	Group Applications	Client Name	Group Number	No. of Quotes	Group Size	Effective Date	ApplicationType	Proposal Status	Enroll	Delete
<input type="checkbox"/>		GroupApp	HD PPO Drug Test	None	2	2	11/01/2006		Quoted		
<input type="checkbox"/>		GroupApp	PPO Option 1 with 397	None	1	2	10/01/2006		Sent to Client		
<input type="checkbox"/>		GroupApp	ABC Company	None	2	4	11/01/2006		Sent to Client		
<input type="checkbox"/>		GroupApp	John Barlow Test	750533	1	2	11/01/2006	Electronic	Sent to Compliance		

To hide a client from a particular User, select that User in the Deallocate Proposals To field. Check the Clients you want to hide from the user and select Deallocate Proposals to Broker.

Client Name: Group Number:

Effective Date From: Effective Date To:
(MM/DD/YYYY) (MM/DD/YYYY)

Created Date From: Created Date To:
(MM/DD/YYYY) (MM/DD/YYYY)

Plan Name:

County:

Application Type: Paper Electronic Both Broker Name:

Deallocate proposals To:

Search Results

<input type="checkbox"/>	PDF	Group Applications	Client Name	Group	Effective Date	ApplicationType
<input type="checkbox"/>		GroupApp	HD PPO Drug Test		11/01/2006	Q
<input checked="" type="checkbox"/>		GroupApp	PPO Option 1 with 397	None	10/01/2006	S
<input checked="" type="checkbox"/>		GroupApp	ABC Company	None	11/01/2006	S
<input type="checkbox"/>		GroupApp	John Barlow Test	750533	11/01/2006	Electronic
<input type="checkbox"/>		GroupApp	0809 Broker HMO Paper	014724		PartialPaper
<input type="checkbox"/>		GroupApp	0809 Broker EPO Paper	014724		PartialPaper
<input type="checkbox"/>		GroupApp	HMS Agency Test	750419		PartialPaper
<input type="checkbox"/>		GroupApp	MM Training Example 5	700184	12/01/2006	Paper
<input type="checkbox"/>		GroupApp	MM Training Example	700184	10/01/2006	Paper
<input type="checkbox"/>		GroupApp	HMS Test	780146	11/01/2006	Electronic

Select User Name from dropdown

Check the Clients you want to hide from user

Then Click Deallocate Proposals to Broker