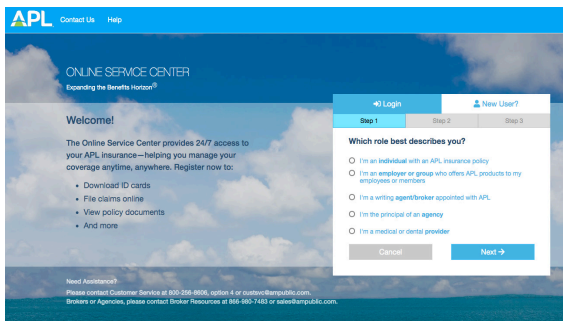


Overview for Broker/Writing Agent

APL's Online Service Center (OSC) is a secure portal where you have 24/7 access to information and tools specific to your insurance needs. Visit secured.ampublic.com and click the **New User** tab to start taking advantage of all the online features we have available for you and your business.

Register New Accounts in 3 Easy Steps!



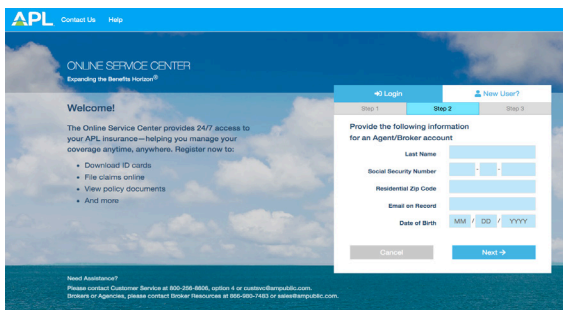
Step 1: From the **New User** tab select the statement which best describes your relationship with APL:

- I am an individual with an APL insurance policy
- I am an employer or group who offers APL products to my employees or members

I am a writing agent/broker appointed with APL

- I am the principal of an agency
- I am a medical or dental provider

Step 2: Provide the required identifying information. Click **Next**.



Step 3: Enter your desired username, password, email and phone number. Click **Next** to create your account.

As a writing agent/broker appointed with APL, you now have access to:

- Dashboard provides at-a-glance commissions and production tables
- Proposal Request Worksheet kick starts your quote requests
- My Groups delivers one-click access to your groups' product offerings, add, change and delete employees, view billing information, group detail report, online claims submission and ID cards
- Manage Users allows you to add users to your OSC account and set access levels to control who and/or what they see on your dashboard

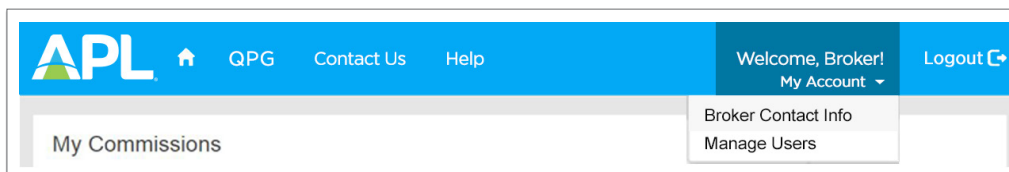
Using Your Dashboard

At the top of the Dashboard, you'll see links to:

- Contact Us
- QPG (Quote Proposal Generator)
- Help
- My Account

My Account

There are two items under the **My Account** drop down; **Broker Contact Info** and **Manage Users**. Broker Contact Info displays the address your OSC account is tied to. To edit this information, please contact APL.



Manage Users

The next item in the drop down, **Manage Users**, lets you to add new users and control their levels of access to your OSC account. This feature is ideal for office administrators, account managers - anyone you want to conduct business on your behalf - with you in control of who and/or what they can see on your dashboard.

To add a user, from the Manage Users panel, click Create New User.

[+ Create New User](#)

Enter the new user's Name, create his/her User Name (there is no criteria), enter his/her email address and optional phone number. Then, assign the **permission level** - Level 3, Level 2 or Level 1 access - as defined in the **Role Descriptions** column.

The screenshot shows the 'Save New User' form with the following data:

| First Name | Last Name | User Name | Email | Phone | Mobile Phone | Active |
|------------|-----------|------------|--------------------|-------|--------------|-------------------------------------|
| Sally | Adminton | sadminton1 | sallya95@email.com | | | <input checked="" type="checkbox"/> |

Below the form, there is a section titled 'Select user's role(s) and assign any agents' with a table of roles:

| Role | Role Description |
|----------------------------------|---|
| <input type="checkbox"/> Level 3 | Allows user to create new users and access all sections of the OSC - My Commission, My Production, My Agents and My Groups for this account. |
| <input type="checkbox"/> Level 2 | Allows user to access all sections of the OSC - My Commission, My Production, My Agents and My Groups - for the Assigned Agent(s) you designate below. |
| <input type="checkbox"/> Level 1 | Allows user limited access to the OSC - My Production, My Agents and My Groups (excludes My Commission) - for the Assigned Agent(s) you designate below |

With permission level set, you can **assign the agents** (if applicable) the user will see details for. Select **All Access** to grant access to all the current and future agents in your account. This action can be undone at any time. You can also search or scroll through your **Available Agents list to grant access to only those agents you select**. Use the arrow (▶) to move the highlighted agent(s) to the Assigned Agents column. Use CTRL + click to move multiple agents at a time. When you're finished, click **Save New User** in the top left.

This screenshot shows the 'Assign Level 2 access to the following Agents:' section. It includes an 'All Access' checkbox and a search bar for agents. The 'Available Agents' list contains 'JANICE BROKER INSURANCE' and 'LEWIS VON AGENT'. The 'Assigned Agents' list is currently empty.

A pop up will appear for you to **confirm** User details. Click **Send** to email the New User his/her User Name, Temporary Password and instructions for completing set up for their new OSC account. Note: User Name and Temporary Password will be sent in separate emails.

The 'Confirm and Send Invitation' window displays the user's details:

| | | | |
|------------|----------------|--------------|--------------------|
| First Name | Sally | Last Name | Adminton |
| UserName | sallyadminton1 | Email | sallya95@email.com |
| Phone | | Mobile Phone | |

At the bottom, there is a 'Click Send to email this user instructions for completing registration' message and 'Cancel' and 'Send' buttons.

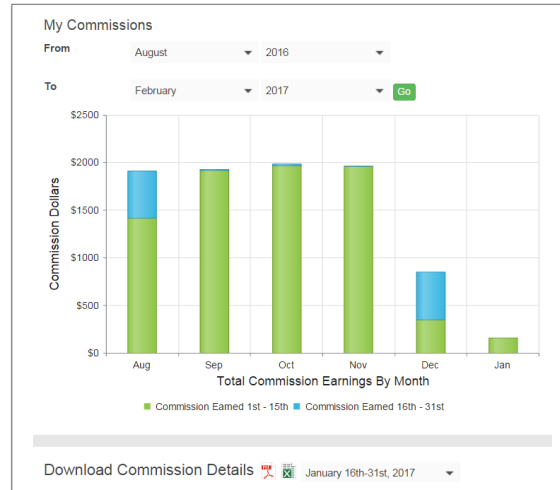
You can adjust user Permissions and edit Assigned Agents any time by clicking plus (+) by the New User's name. To resend a **new temporary password**, click **Reset Password** button. To **deactivate** a User, uncheck the box in the **Active** column. Recheck the box to reactivate the user.

The screenshot shows the user list table with the following data:

| First Name | Last Name | User Name | Email | Phone | Mobile Phone | Active |
|------------|-----------|----------------|--------------------|-------|--------------|--|
| + Sally | Adminton | sallyadminton1 | sallya95@email.com | | | <input checked="" type="checkbox"/> Reset Password |

Commissions

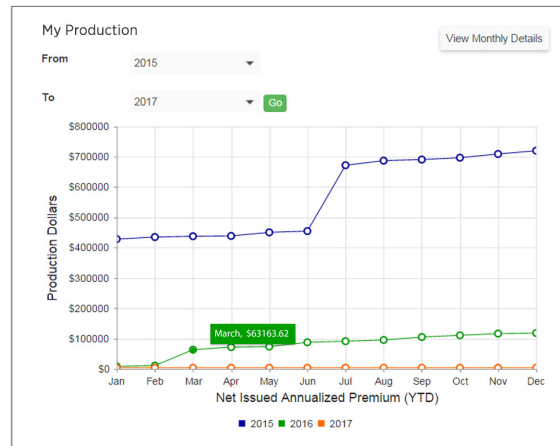
Below the top navigation, you'll find **My Commissions**. There are two ways you can view commissions: use the calendar drop down to set your date range and display a graph or select your payment period from **Download Commission Details** and generate a PDF or Excel document. Hover over any column in the graph to see the dollar amount of commission earned for that period. If your commissions are paid directly to an agency, nothing will display in the graph or **Commission Details** report.



Production

Next to My Commissions, you'll find **My Production**. This graph displays your year-to-date net issued annualized premium by month and year. There are several interactive tools to help you manage your production data, including:

- Calendar drop downs set your date range to display production
- Multi-year date range displays year-to-date comparisons
- Hover over any point on the graph to see exact dollar value
- Click on the date(s) in legend to hide/show the year's production



View Monthly Details

In the top right of the **My Production** table, you'll find the **View Monthly Details** button. Set the "From" and "To" date ranges in the drop down menus and click on the **View Monthly Details** tab to see a side-by-side table view of your monthly production premium dollars.

My Monthly Production

| | 2015 | 2016 | 2017 |
|-----------|------------|------------|----------|
| Month | Premium | Premium | Premium |
| January | \$0.00 | \$0.00 | \$550.56 |
| February | \$923.28 | \$4,222.92 | \$0.00 |
| March | \$923.28 | \$461.64 | \$0.00 |
| April | \$0.00 | \$1,384.92 | \$0.00 |
| May | \$0.00 | \$923.28 | \$0.00 |
| June | \$275.28 | \$461.64 | \$0.00 |
| July | \$0.00 | \$461.64 | \$0.00 |
| August | \$493.80 | \$258.00 | \$0.00 |
| September | \$0.00 | \$1,027.08 | \$0.00 |
| October | \$0.00 | \$0.00 | \$0.00 |
| November | \$0.00 | \$0.00 | \$0.00 |
| December | \$0.00 | \$0.00 | \$0.00 |
| Total | \$2,615.64 | \$9,201.12 | \$550.56 |

Proposal Request Worksheet

Just below My Production is the **Proposal Request Worksheet**. Clicking the Start Now button will open a fillable PDF you can download to your desktop, complete and email to sales@ampublic.com. This form has all the information we'll need to begin a custom quote for your group.

Proposal Request Worksheet [Start Now](#)

My Groups

Next, you'll see details on your groups. The **My Groups** portion of the dashboard shows a collapsed view of your insured groups, including a powerful **Search** tool for quick access to employees for: uploading claims documents, submitting claims online or downloading ID Cards. Click (+) to expand the group's name for details on the products offered in the group, billing summaries, group detail report, insured employees, filing a claim, employee contact information, coverage details, available ID Cards and more.

The screenshot shows the 'My Groups' interface. At the top, there's a search bar with the text 'Need to file a claim? View ID cards? Find a group? Search for a group or employee to get started.' Below this is a table of groups. The first group is 'STAR DUST FURNITURE' with a 'Download Report' button. Below the table, the details for the group are expanded, showing the employee 'IRIS, IRVIN' with their SSN, policy information, and a 'File Claim' button.

Group Detail Report

From **My Groups**, locate the group name and click "Download Report" from the Detail Report column. The report downloads an excel file so you can sort, save and print.

This screenshot shows a smaller view of the 'My Groups' dashboard. It highlights the 'Download Report' button in the 'Detail Report' column for the group 'ABC BUSINESS'.

File a Claim

This feature is only available through the desktop version of the OSC. Mobile functionality is not yet supported.

It's easy to upload claim documents and submit a claim online for your groups' insured employees. Simply **Search** for an employee by name or Social Security Number to begin.

Once you locate the employee, click the green "File Claim" button and follow the three easy steps to upload documents and submit the claim.

This screenshot shows the search bar for employees. It includes a dropdown menu for 'Search For Employee By:' with 'Name' selected, and input fields for 'First Name' and 'Last Name' with a 'Search' button.

This screenshot shows the employee profile for 'IRIS, IRVIN'. It displays the employee's SSN, policy information, and a 'File Claim' button.

Upload Documents and Submit Claims Online

The 'File a Claim' form is shown in three steps: 1. Enter Claim Details, 2. Upload Documents, and 3. Complete. The 'Claimant' field is set to 'Jane Insuredson - Dependent'. The 'Coverage Type' section has two options: '2211000 - GROUP ACCIDENT (Active)' and '2233456 - MEDLINKP MEDICAL (Active)', with the second option selected. There are 'Cancel' and 'Next' buttons at the bottom.

1. From the Claimant dropdown, select the name of the insured you're filing a claim for.

Then select the Coverage Type you're filing the claim on. Click "Next" to continue.

Note: Lapsed policies will appear under Coverage Type for 90 days after the policy lapses. If the insured's name and/or coverage type isn't listed, simply click the link to launch the alternative upload option.

File a Claim

1. Enter Claim Details | **2. Upload Documents** | 3. Complete


Please verify the information below is correct. At least one file must be uploaded before submitting. All uploaded documents must be for one date of service per claimant. Additional dates of service and/or claimants should be uploaded as separate claims.
Acceptable file types are: pdf, tiff, png, jpg, jpeg, doc and docx. Missing documentation may delay the processing of your claim.


Claimant Info

Insured: Jane Insuredson
Selected Coverage: 2233456 - MEDLINKP MEDICAL

Upload files

Select files...

 Name: My Claim Docs-Jane.pdf
Size: 0.13 MB

 Name: Invoice for Jane's Xray.docx
Size: 0.08 MB

Cancel Back **Submit**

- Once you verify the Claimant and Policy details are correct, click "Select files" to choose the document(s) to upload. To select multiple documents at one time, hold down Ctrl (Windows) or Command (Mac) and click on the file names.
Click "Open" once you've located your file(s).
Confirm the files you selected are correct and click "Submit."

Note: Click "x" next to the file name to remove the file. To add another file, click "Select Files." To return to the previous screen, click "Back" or click "Cancel" to return to your dashboard. Supported file types include: pdf, tiff, png, jpg, jpeg, doc and docx. The total combined file size cannot exceed 20 MB (5 MB if using Internet Explorer).

File a Claim

1. Enter Claim Details | 2. Upload Documents | **3. Complete**

Claim Uploaded Successfully!

Insured: Jane Insuredson
Date of Birth: 01-01-1981
Confirmation Number: 10257

[Please print this page for your records](#)

Close

- A confirmation page will appear when the claim documents are uploaded and submitted successfully.
Click "Close" to return to the employee's details on your dashboard.

Your claim submission history is displayed under the **Claims** tab of the employee's details. Access the uploaded claim documents by clicking "View File(s)". Claim documents and details are viewable for 60 days from the Date Received.

Note: Your dashboard will only display details for claims you have submitted on behalf of the employee. All other claims information is accessible only to the employee.

| IRIS, IRVIN | ***-**-7411 | MEDLINK W/BENEFIT ASSIGNMENT | P O BOX 1 | JACKSON | MS | 39205 | IRVIN.IRIS@TEST.COM |
|--|--------------|------------------------------|---------------------------|------------|------------------------------|---------------|---------------------|
| <p>Employee Profile Products Claims File Claim <input checked="" type="checkbox"/> Change Employee <input type="checkbox"/> Delete Employee</p> | | | | | | | |
| Confirmation Number | Claim Number | Status | View File | Insured | Coverage Type | Policy Number | Date Received |
| OSC14839 | | Received | View File | IRVIN IRIS | MEDLINK W/BENEFIT ASSIGNMENT | 2061592 | 08/16/2022 |
| | | | | | | | 1 - 1 of 1 items |

If a platform was used to enroll the group, please make your adds, changes and deletes through the platform.

ADD AN EMPLOYEE

Use for new hires, annual open enrollment and employees who are not currently covered but experience a qualifying event

From your Online Service Center (OSC) dashboard, under **My Groups**, use the **Search** tool for quick access to your groups or scroll down the list to find the group you want to add an employee to.

After locating the group, click (+) to expand the group's details, then click the green **"Add Employee"** button in the group's navigation bar.

Follow the prompts to enter the details for the new employee. *Note, at any time, you may click **Back** to return to the previous screen or **Close** to cancel the process.*

Select the Reason for Enrollment from the drop-down menu.

Enter the application information:

- Employee's effective date of coverage
- Employee's Date of Birth
- Division, if applicable

Select the Product the employee is enrolling in and click Continue

Continue entering the employee's information:

- Name, Social Security Number and Gender

Click Continue

Enter the employee's contact information:

- Complete Address, Phone and Email Address

Click Continue

Enter the additional employee information:

- Select Yes or No for U.S. Citizen
- Select Yes or No for COBRA
- Select Yes or No for Actively at Work

Click Continue

Enter the coverage information for the employee:

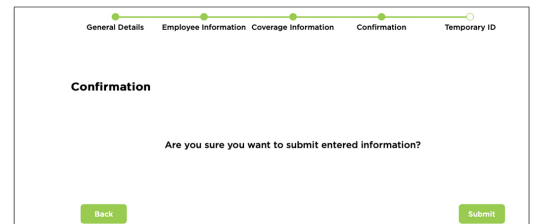
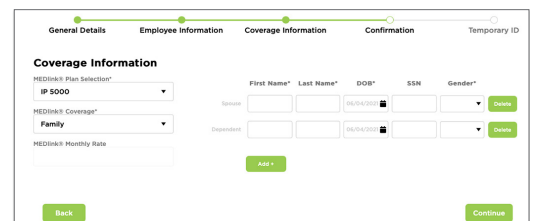
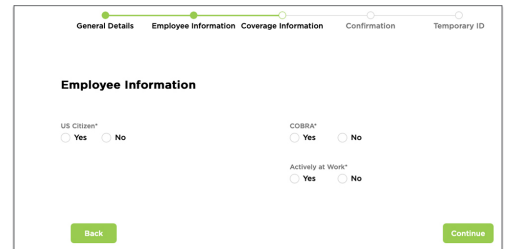
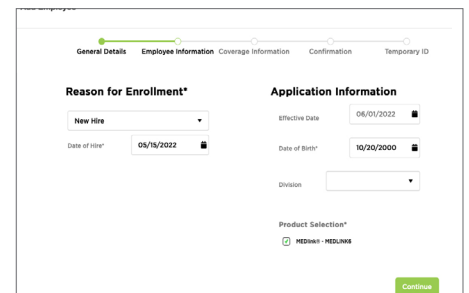
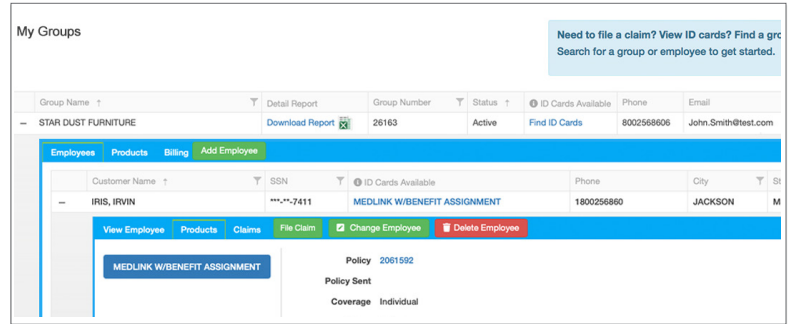
- Select the plan from the drop down for each product
- Select the coverage tier, enter any spouse or dependent information, if applicable

Click Continue

Lastly, click the **"Back"** button to make changes or **"Submit"** to complete the process.

The employee's ID card(s) (for applicable products) and full certificate will be available in the OSC on the next business day. Once available, the employee, group or broker can access, view and download a copy of their ID card(s) and/or policy certificate(s).

A history of Recent Activity will appear below the My Groups section on your dashboard. After you have completed an Add, Change or Delete, refresh your screen to view the updated activity in the "Recent Activity" grid. To narrow down your search criteria, use the filter at the top right of each column and change the criteria to "contains" and enter the data you wish to search.



| Group Name | Employee Name | Activity | Entry Date | Status |
|---------------------|---------------|-----------|------------|---------------|
| STAR DUST FURNITURE | IRVIN IRIS | Initiated | 08/23/2022 | Policy Issue |
| STAR DUST FURNITURE | IRVIN IRIS | Initiated | 08/23/2022 | Policy Change |

Page 1 of 1

CHANGE AN EMPLOYEE

Use for employees who currently have coverage but experience a qualifying event or need to make benefit adjustments during open enrollment

From your dashboard, under **My Groups**, you can use the **Search** tool for quick access to employees or click (+) to expand the group's name and display the list of insured employees.

Locate the employee to change, click (+) to expand the employee's details and select the green **"Change Employee"** button from the navigation bar.

Follow the prompts to enter the details for the change.

- Choose the Qualifying Event from the drop-down menu
- Enter the Qualifying Event Date
- Update general personal information, if necessary
- Select Yes or No for Cobra
- Select the division the employee is in, if applicable
- Select the product(s)

Click Continue

Continue editing the coverage information page by following the prompts and drop-down menus. When complete click Continue.

Click green **"Back"** button to make changes or the green **"Submit"** to complete the process and receive confirmation.

Note: Changes may take up to 48 hours to reflect in the OSC, however, a history of Recent Activity will appear below the My Groups section on your dashboard. After you have completed an Add, Change or Delete, refresh your screen to view the updated activity in the "Recent Activity" grid. To narrow down your search criteria, use the filter at the top right of each column and change the criteria to "contains" and enter the data you wish to search.

DELETE AN EMPLOYEE

Use to terminate/lapse an employee's coverage

From your dashboard, under **My Groups**, you can use the **Search** tool for quick access to employees or click (+) to expand the group's name and display the list of insured employees.

Locate the employee that needs to be deleted, click (+) to expand the employee's details and select the red **"Delete Employee"** button from the navigation bar.

Follow the prompts to delete the employee.

- Choose the Qualifying Event from the drop-down menu
- Enter the Qualifying Event Date and Termination Date
- Click Continue to receive the Confirmation Page

Click green **"Cancel"** button to make changes or the **"Delete"** button to permanently remove the employee and receive a final confirmation.

Note: Changes may take up to 48 hours to reflect in the OSC, however, a history of Recent Activity will appear below the My Groups section on your dashboard. After you have completed an Add, Change or Delete, refresh your screen to view the updated activity in the "Recent Activity" grid. To narrow down your search criteria, use the filter at the top right of each column and change the criteria to "contains" and enter the data you wish to search.

| Recent Activity | | | | | |
|---------------------|---------------|-----------|------------|---------------|--|
| Group Name | Employee Name | Activity | Entry Date | Status | |
| STAR DUST FURNITURE | IRVIN IRIS | Initiated | 08/23/2022 | Policy Issue | |
| STAR DUST FURNITURE | IRVIN IRIS | Initiated | 08/23/2022 | Policy Change | |

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