



online quoting and enrollment guide

Online Quoting

Go to edge.ameritas.com. Under the Brokers tab, click **Quotes Log in**. Enter your agent number and password and select **Log in**.

Takeover is available on select groups with in-force group coverage. Quoting is available for takeover and non-takeover groups.

New Users

You will need your agent number to create your secure account. If you need assistance obtaining your agent number, contact Licensing at 855-517-5307, option 5.

Benefits of Online Quoting

- 24 hours a day/7 days a week
- Easy to make plan modifications
- See premium adjustments in real time
- Generate a PDF that you can save and/or email directly from your computer
- Previous online quotes are stored for easy access

Create a Quote

- Click **Prepare Online Quote** under the Quotes tab.
- Enter group information and click **Next**.
- Enter desired plan options, i.e. Dental/Vision/Both.
- Enter type of plan, i.e. Voluntary/Employer Paid. If Employer Paid, enter applicable percentage option. Click **Next**.
- Select plan(s) and click **Next**.
- Modify plan benefits if desired. Premium amounts are updated as various options are selected. Click **Next**.

Print, Email and Save Quotes

After creating a quote, you will be given options on a summary page:

- **Save/Review** creates a secure PDF that can be printed, saved, and/or emailed.
- **Display my Quote with weekly rates**.
- **Email Quote** allows you to add multiple email addresses as needed.

Manage Online Quotes

- You have the option to review a secure list of your previously created quotes via **Manage** located under the Quotes tab at the top of the page. Quotes are stored for 60 days from the effective date of the quote.
- Also available under the Quotes tab are links to **Request a Quote**, and a PDF version of this online quote guide.

Broker Tools

- Ameritas Edge Renewal statements
- Online Enrollment
- View Commission Statements
- Request a Quote Online
- Online Broker Statements
- Online Quote System
- Manage Online Quotes
- Update Personal Information
- Edit Login Information

Online Enrollment

Go to edge.ameritas.com, select the Brokers tab and click on **Enrollment Log in**. Enter your agent number and password and select **Log in**.

New Groups

- Select **Begin New Enrollment Process**.
- You will be asked a series of questions based on what you sold. Once you complete all questions, view the **Acknowledgement and Disclaimer**, and click **Submit**. A group number will automatically be assigned.
- **The Master Application(s) and/or New Business Transmittal** will auto-fill with the information you provided. Please feel free to email the form(s) to your client, or print a copy for your records.
- When you are ready to continue, simply click on **Enroll employees for Group Number** and complete an **Enrollment Form** for each employee enrolling.

Additions

- Select **Enroll Additional Employees for an Existing Group**.
- Select the group from the list of your current groups, which are in order by **Account Name and Billing ID #**.
- Complete an enrollment form for each employee enrolling.

Changes

- Select **Submit a Change Request Card**.
- Complete the online **Dental/Vision Change Card**.
- After each change is submitted, you will receive immediate confirmation.

Enrollment Details

- Benefits are available for all eligible employees who have completed the designated waiting period.
- Existing employees who have met the designated waiting period are eligible for benefits without a late entrant penalty if enrolling during the group's open enrollment period.
- Employees can add dependents during the open enrollment period or within 30 days of a qualifying life event.

It's easy to generate quotes and update employee information online. And we're always here to help if you need us.

If you have questions, contact Agent Services at agentservices@ameritas.com or 855-517-5307, option 4.



For producers only.

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