



National General Agent Back Office User Guide

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Sign In

- The User Name is not case sensitive. ABO Sign In credentials are the same as the AMS Sign In credentials.
- Check 'Remember Me' if you would like your Sign In to be remembered, even after you close your browser.

Welcome to the Agent Back Office

Sign In

User Name

Password

Sign In

Remember Me

[Forgot User Name?](#)
[Forgot Password?](#)

For issues with signing in, please call Agent Support at 888.376.3300

National General Accident & Health markets products underwritten by Time Insurance Company, National Health Insurance Company, Integon National Insurance Company and Integon Indemnity Corporation.
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- When there is more than one NPN for the agent, the following Profile Selection page will display.
- Click the down arrow to display available Profiles to choose from. Select desired profile and click Continue.

Welcome to the Agent Back Office

Profile Selection

Please select your profile from the list below.

Select Profile

Continue

- Agent Back Office (ABO) Home Page displays. You can now access Agents, Customers, Policies, List Bill and Pended Applications for the selected profile.

- To access information for other Profiles, click on the Profile icon in the upper right corner of any page and click on Switch Profile. The Profile Selection page will display. Click on other Profile and click Continue to Sign In to the other Profile.

ent and Health Agents Back Office Portal. This portal will allow you to get information about your entire agent hierarchy and book of business, across product lines. Select from one of the options
you must log in to the appropriate product application submission tool.

Policies at risk

- Payment Past Due Policies:
- Attestation not received Policies: **502**
- Terminating STM Policies: **201**

Help Documents

- ABO User Guide
- LIFE Basic Plan (Not available in: IA, KS and WI)
- LIFE Select Plan A (Not available in: IA, and WI)
- LIFE Preferred Plan B (Not available in: IA, KS, ME, MT, UT and WI) 02/13/2020
- LIFE Prime Plan C (Not available in: IA, KS, ME, MT, UT and WI) 02/13/2020
- LIFE Sterling Plan D (Not available in: IA, KS, ME, MT, UT, and WI) 02/13/2020
- MyLifeWellness (Not available in: UT, VT, and WA) 02/13/2020

Home Page

Welcome

Welcome to the National General Accident and Health Agents Back Office Portal. This portal will allow you to get information about your entire agent hierarchy and book of business, across product lines. Select from one of the options on top to get started.

Please Note: To view pending policies you must log in to the appropriate product application submission tool.

Links

- Get a Quote!
- Claim Forms
- Invitation Builder

Policies at risk

- Payment Past Due Policies: 271
- Attestation not received Policies: 512
- Terminating STM Policies: 217

Help Documents

| Help Documents | Updated |
|---|------------|
| ABO User Guide | 11/26/2019 |
| LIFE Basic Plan (Not available in: IA, KS, ME, MT, UT and WI) | 02/13/2020 |
| LIFE Select Plan A (Not available in: IA, KS, ME, MT, UT and WI) | 02/13/2020 |
| LIFE Preferred Plan B (Not available in: IA, KS, ME, MT, UT and WI) | 02/13/2020 |
| LIFE Prime Plan C (Not available in: IA, KS, ME, MT, UT and WI) | 02/13/2020 |
| LIFE Sterling Plan D (Not available in: IA, KS, ME, MT, UT, and WI) | 02/13/2020 |
| MyLifeWellness (Not available in: UT, VT, and WA) | 02/13/2020 |
| WellCard Savings (Not included with all LIFE Association plans) | 02/13/2020 |
| Aetna STM State Restrictions and Variations | 04/14/2020 |
| NGAH - Product State Availability | 04/14/2020 |
| Agent Product Guide | 05/08/2020 |
| Cigna STM State Restrictions and Variations | 05/08/2020 |

The Home Page consists of the following:

1. Navigation Bar

The navigation bar is displayed horizontally and static on every page. The navigation bar allows you to select from the following tabs:

- Home – This tab takes you to the home page, as shown above.
- Agents – This tab takes you to agent information, such as agent details and hierarchy.
- Customers – This tab takes you to your entire list of customers and your downline hierarchy's customers.
- List Bill – This tab displays the list of any List Bill requests you have sent, status of those requests, and provides the ability to create a new invitation to send to new prospective List Bill clients. This is the first step in the online application process for List Bill groups.
- Pended Applications – This tab will display the list of pended applications.

2. Links

- Get a Quote! – Clicking on this link displays the National General page for initial Quotit Account registration or to sign into Quotit if they are already registered. This link will only display if the agent has an arrangement that indicates they are a writing agent.
- Claim Forms – Clicking on this link will take you to get claim submission information and forms.
- Invitation Builder – Clicking on this link will navigate you to the Agent Management System (AMS) Sign In page. This link will only display if the agent is a recruiter.

3. Policies at risk

- Payment Past Due Policies – The count shows your policies with an overdue payment within the past 30 days and new future dated policies with declined payments.
- Attestation not received Policies – The count shows:
 - Policies effective after 11/1/2017 and missing attestation (eSignature or Voice Verification). Voice Verifications take up to 2 days to get recorded.

- ii. Currently Active policies (includes policies with future termination dates).
 - iii. Excludes LIFE Association policies (except for MyLIFEWellness).
 - iv. This function does not apply to policies submitted by Agile, AHIX API, eHealth XML, Quotit Customer (ePro), SureCo API, UHOneAPI, or Vera Health policies.
 - c. Terminating STM Policies – The count shows your STM policies that are about to terminate. Policies shown will be in the last policy period of any STM x 2, 3, or 4 sequence and any standard 30 day – 12 month policy terms.
 - d. Clicking on the count takes you to the Policies Page where you can export the list to a .csv file.
4. Help Documents
A list of reference documents. Click on the document name to open the document in .pdf format.
5. Profile
Click on your name in the upper right corner to access your profile and details. You can also change your password, which will update ABO and the Agent Management System (AMS).

Page Features

In addition to the navigation bar, every page you navigate to will have the following consistent features:

1. Apply button
 - a. Click Apply or place cursor in any text field and press Enter to view results list.
 - b. If volume of requested data is too large, a message will display to click the Download button or you can use more filters to narrow the search results.
2. Filter Options
 - a. Fill out one or more of these fields to narrow your search.
 - b. The data entered into the fields is not case sensitive.
3. Results List
 - a. Click on any of the headings to sort in ascending or descending order. The arrow indicates the direction of the sort.
 - b. The default sort is by Create Date (newest to oldest).
4. Collapse Filters
 - a. Click on this button to hide the Filter options and allow for more data to display in results list.
5. Download

Click on this button to download data in a .csv format.

 - a. Download now – to export current results view.
 - b. Download full details – to export ALL column options.

Agents

The Agent List page allows you to search agents under your TIC and NHIC hierarchy simultaneously based on NPN. When you first navigate to this page, there are no results. Click Apply to see all your downline hierarchy agents OR enter filter option(s) to narrow your search.

Some things to note with this section:

- Enroller ID
 - Must be an exact match.
 - Tree option – Check to see downline hierarchy of Enroller ID entered.
- Create Date Start
 - Enter in a Create Date Start to bring back all agents effective or after that date and later.
 - Can be used in conjunction with Create Date End to search by a date range.
- Create Date End
 - Enter in a Create Date End to bring back all agents effective through that date.
 - Can be used in conjunction with Create Date Start to search by a date range.
- Select Agent Indicator(s)
 - When 2 or more indicators are checked, they are being treated as 'and' conditions. The results list needs to meet all of the selected conditions.
- Results List
 - Click on any of the following to see the agent's profile:
 - Enroller ID
 - Last Name
 - First Name

Agent Details

Upon clicking the Enroller ID or Name in the results list, you will be navigated to the Agent Details page.

The Agent Details page consists of the following:

1. Back to Agent List – This link takes you back to the Agent List page.
2. Agent Demographics – The section in blue gives you high level agent information.
3. Legal Entity – The agent details for each legal entity are included in each tab.
4. Agent Information – Agent details for that legal entity for the listed Enroller ID.
5. Parent Information – This shows the parent agent that the listed Enroller ID is attached to. If there are different hierarchies for the different Legal Entities/Enroller IDs, the information under the parent section will only display if you are part of the hierarchy.
6. Links
 - a. Get a Quote! – Clicking on this link displays the National General page for initial Quotit Account registration or to sign into Quotit if they are already registered. This link will only display if the agent has an arrangement that indicates they are a writing agent.
 - b. Product Brochures – Clicking on this link navigates you to the agent website for product brochures.

Agent Hierarchy 7


Export To CSV

| Enroller Id | Name | Agent Label | Company |
|-------------|------|-------------|---------|
| | | | |

Agent Product Authorization 8

Export To CSV

| Product Id | Products |
|------------|--|
| 21043 | ACCIDENT FIXED-BENEFIT PLAN (NHIC-ASSOCIATION) |
| 21044 | ACCIDENT FIXED-BENEFIT PLAN (NHIC-INDIVIDUAL) |
| 20231 | CANCER & HEART/STROKE |
| 21677 | CRITICAL ILLNESS W/ TERM LIFE - INDIVIDUAL |
| 21618 | DENTAL INDEMNITY - GUARANTEED ISSUE (INDIVIDUAL) |
| 15550 | DENTAL PPO - ASSOCIATION |
| 15988 | DENTAL PPO - INDIVIDUAL |
| 16803 | HOSPITAL EXPENSE PROTECTION |
| 16804 | HOSPITAL EXPENSE PROTECTION |

7. Agent Hierarchy – This is a tree view of the agent’s downline hierarchy.
 - a. To expand the tree, click on the plus sign  next to the Enroller ID.
 - b. If the plus sign is not there, that means there is no downline hierarchy to display.
 - c. Click Export to CSV to download the results in a .csv format.
8. Agent Product Authorization – This is the list of products the listed Enroller ID is authorized for.
 - a. Click Export to CSV to download the results in a .csv format.

Licenses 9

Export To CSV

| License# | License Residency | License Type | State | Effective Date | TerminationDate |
|----------|-------------------|--------------|-------|----------------|-----------------|
| | Y | LIFE,HEALTH | UT | 05/16/2002 | 11/30/2021 |

Appointments 10

Export To CSV

| Legal Entity | State | Effective Date | TerminationDate |
|----------------------------|-------|----------------|-----------------|
| No data available in table | | | |

9. Licenses – This shows the licenses the agent holds, including the line of authority, state, effective date and termination date, when applicable.
 - a. Click Export to CSV to download the results in a .csv format.
10. Appointments – This shows all the agent’s appointments, including the state, effective date and termination date, when applicable.
 - a. Click Export to CSV to download the results in a .csv format.

Customers

The Customer List page displays your downline agents' customers. When you first navigate to this page, there are no results. Click Apply to see all your downline hierarchy customers OR enter filter option(s) to narrow your search.

Some things to note with this section:

- Member ID (also known as Customer ID) – Must be an exact match.
- Policy Number - Must be an exact match.
- Enroller ID
 - Must be an exact match.
 - Tree option – Check to see customers for downline hierarchy of Enroller ID entered.
- All customers will be shown for both TIC and NHIC sales as long as the NPN matches on your agent profiles.
 - Example: You have Enroller ID 12345 for TIC and 67890 for NHIC. You sold customer John STM and customer Jane Dental Indemnity. On both agent profiles, you have the same NPN. When you look at your customer list, both John and Jane will display.
- List Bill No - Must be an exact match.
- Phone Number – No specific formatting needed (i.e. do not include hyphens or parentheses).
- Create Date Start
 - Enter in a Create Date Start to bring back all customers created from that date and later.
 - Can be used in conjunction with Create Date End to search by a date range.
- Create Date End
 - Enter in a Create Date End to bring back all customers created through that date.
 - Can be used in conjunction with Create Date Start to search by a date range.
- Status (select from dropdown)
 - Active – Record has at least one Active policy and there are no policies on Hold.

- Inactive –Record has at least one Inactive policy and there are no policies on Hold.
- Incomplete – All policies on record are incomplete.
- Hold – Record has at least one policy in Hold (meaning policy is Active, in grace period).
- Payment Past Due – When checked, results list will include customers who have at least one policy with an overdue payment within the past 30 days.
- Results List – Click on Member ID to see the Policy Details.

Policies

The Policy List page displays your downline agents' policies. When you first navigate to this page, there are no results. Click Apply to see all your downline hierarchy policies OR enter filter option(s) to narrow your search.

Some things to note with this section:

- Policy Number - Must be an exact match.
- Member ID (also known as Customer ID) – Must be an exact match.
- Last Name – Partial or full name accepted.
- First Name – Partial or full name accepted.
- Enroller ID
 - Must be an exact match.
 - Tree option – Check to see policies for downline hierarchy of Enroller ID entered.
- All policies will be shown for both TIC and NHIC sales as long as the NPN matches on your agent profiles.
 - Example: You have Enroller ID 12345 for TIC and 67890 for NHIC. You sold customer John STM and customer Jane Dental Indemnity. On both agent profiles, you have the same NPN. When you look at your policy list, both John and Jane will display.
- List Bill No - Must be an exact match.
- Create Date Start
 - Enter in a Create Date Start to bring back all policies created from that date and later.
 - Can be used in conjunction with Create Date End to search by a date range.
- Create Date End
 - Enter in a Create Date End to bring back all policies created through that date.
 - Can be used in conjunction with Create Date Start to search by a date range.
- Status (at the policy level) (select from dropdown)

- Active – Policy is Active.
- Inactive – Policy is Inactive (either canceled or terminated).
- Incomplete – Policy is Incomplete (policy was never Active).
- Hold – Policy is not paid and in grace period.
- Policy End Days
 - Select 'Next 30 days' to filter policies ending in the next 30 days.
 - Select 'Next 60 days' to filter policies ending in the next 60 days.
- Results List – Click on Member ID to see the Policy Details.

Policy Details

Upon click of Member ID link in the results list, you will be navigated to the Policy Details page. The Policy Details page is the same when coming from the Customer List or Policy List.

Agent Back Office >> Home Agents Customers Policies List Bill Pended Applications Jana Emerson

Back to Policy List 1

Test1984, John
Member Id: 725364076

3 1 active policies of 1
Total Premium: \$395.45

Contact 2
Phone: [Redacted]
Email: [Redacted]
DOB: 09/01/2019

Information
Gender: Male
Yes
4 [Redacted]

Address

5 - SHORT TERM MEDICAL PPO

| | | |
|--|---|---|
| Policy Number: [Redacted] | Policy Status: ✓ Active In Force | Monthly Premium Total: \$395.45 |
| Product ID: 5001 | Create Date: 08/30/2019 | Billing Frequency: MONTHLY |
| Product Category: | Effective Date: 09/01/2019 | Paid: Yes |
| Benefit: ENHANCED PPO - \$2,500 100/0 | Termination Date: 08/29/2020 | Paid Thru Date: 07/31/2020 |
| Issue State: WI | Term: 12 Months | Next Billing Date: 09/28/2020 |
| Legal Entity: NHIC | Attestation Date: ✓ 06/18/2020 | Next Billing Amount: \$395.45 |
| Enroller Id: [Redacted] | Fulfillment Type: ELECTRONIC | Payment Type: CC |
| Agent Label: [Redacted] | View ID Cards | Submission Source: ES BATCH TEST |
| Company: [Redacted] | | Network: Cigna |
| Healthy Discount: ✓ Yes | | Renewable Terms: 1 |
| STM Activity Tracker Credit: ✓ Yes | | |

The Policy Details page consists of the following:

1. Back to Customer List / Back to Policy List – This link takes you back to the Customer List / Policy List page
2. Customer Demographics – The section in blue gives you high level customer information.
3. Policy Snapshot – This count shows the total number of policies and total premium for all policies on this record.
4. Agent – This identifies the agent that sold the policy. You can click on the agent name to go to the agent’s profile.
5. Policy Details – Click on the black down arrow to see the customer’s policies.
 - a. Click on each policy to see the policy details (e.g. policy number, effective date, billing info, etc).
 - o Benefit - The “current Benefit” loads based on the date/policy term. If the plan changed, will not see the former Benefit.
 - b. View ID Cards – Click on this button to view/print ID card for that specific policy. Note: this button will only display for products that have an ID card.

c. Healthy Discount and/or STM Activity Tracker Credit – Displays if applied to the policy.

| Renewals 6 | | | | |
|---|---|-------------------|----------------|------------------|
| Sequence Number | Original Renewal Premium 7 | Status | Effective Date | Termination Date |
| 1 | \$395.45 | Active - In force | 09/01/2019 | 08/29/2020 |
| 2 | \$470.59 | Active - Renewal | 08/30/2020 | 03/03/2021 |

- 6. Renewals grid - Applies to policies with renewal terms; not consecutive terms with different policy numbers.
- 7. Original Renewal Premium - Amount printed on the renewal notification (48 or 63 days in advance of the renewal term's effective date).
 - a. If there are endorsements from the time of notification to the effective date of the policy term that impact the premium, the amount will not change.

| Dependents 8 | | | | |
|---|--------------|---------------|-----|--------|
| Name | Relationship | Date Of Birth | Age | Gender |
| TEST1984, JOHNNY | Child | 06/09/2005 | 15 | Male |

Showing 1 to 1 of 1 entries

| Beneficiary 9 | |
|--|--------------|
| Name | Relationship |
| Ben Test | TEST |

Showing 1 to 1 of 1 entries

| Transactions 10 | | | | | | |
|--|------------------|--------------|----------|----------|--------------|------------|
| Transaction Date | Transaction Type | Payment Type | Total | Status | Account Name | Account No |
| 06/26/2020 | Payment | CC | \$395.45 | Approved | | |
| 06/18/2020 | Payment | CC | \$0.00 | Approved | | |

Showing 1 to 2 of 2 entries

8. Dependents – This section displays the dependents tied to this specific policy, if applicable.
9. Beneficiary – This section displays the beneficiaries for this specific policy, if applicable.
10. Transactions – This section displays the billing transactions and status.

List Bill

This page includes the ability to send invite to the online List Bill application process, track the status of that invite and obtain the LB Group # as soon as the group is approved.

Agent Back Office >> Home Agents Customers Policies List Bill Pending Applications Filter Status

List Bill Accounts

Request New List Bill Account

Contact First Name

Last Name

Entity/Business Name

Business Email

Business Phone

Send Invitation

*Required fields

| Business Name | Contact Name | Business Phone | Business Email | Status | Create Date | List Bill Account # |
|---------------|--------------|----------------|-----------------------------|-------------|-------------|---------------------|
| ... | ... | (916) 999-2122 | agent1@outlook.com | Invite Sent | 04/14/2020 | |
| ... | ... | (214) 234-2344 | agent@out.com | Invite Sent | 03/02/2020 | |
| ... | ... | (817) 731-8888 | customer@webstercompany.com | Approved | 01/09/2020 | |
| ... | ... | (803) 487-2776 | webstermanned@nc.com | Approved | 12/06/2019 | |
| ... | ... | (803) 487-2776 | webstermanned@nc.com | Invite Sent | 12/06/2019 | |
| ... | ... | (704) 414-4141 | webstermanned@nc.com | Invite Sent | 08/20/2019 | |
| ... | ... | (704) 414-4141 | webstermanned@nc.com | Invite Sent | 08/06/2019 | |
| ... | ... | (704) 414-4141 | webstermanned@nc.com | Invite Sent | 08/06/2019 | |
| ... | ... | (704) 414-4141 | webstermanned@nc.com | In-review | 07/08/2019 | |

Showing 1 to 9 of 9 entries

Previous 1 Next

The List Bill Accounts page consists of the following:

1. List Bill Accounts – Prefills with your entire list of List Bill Account requests. This list consists of existing and pending List Bill Accounts.
2. Business Name – Name of the business requesting the List Bill Account.
3. Contact Name – Name of the business contact who will be completing the application for the List Bill Account.
4. Business Phone – Phone number for the business contact person.
5. Business Email – Email used for all electronic correspondence regarding the List Bill Account.
6. Status – Provides the current status of all List Bill Accounts requested by you.
 - a. Invite Sent – An invitation to complete a List Bill Account application was sent to the person named in the Contact Name field. It will remain in this status until the application is submitted to National General.
 - b. In-review – The application for a List Bill Account is being reviewed by National General for final decision/approval.
 - c. Declined – The application for a List Bill Account was declined by National General.
 - d. Approved – The application for a List Bill Account was approved by National General.
7. Create Date – The date the invitation to apply for a List Bill Account was sent to the Business Contact.
8. List Bill Account # - This List Bill Account # will display if approved. The agent and the group will also receive email confirmation.
9. Envelope icon – Icon will display if status is 'Invite Sent'. When selected, this triggers the invite to resend to that prospective List Bill Account Holder.

10. Collapse form – Click on this button to hide the 'Request New List Bill Account' section.
11. Download – Click on this button to export current results view in .csv format.

Request New List Bill Account

This page allows you to gather necessary information to generate an invitation to a client requesting a List Bill Account. All fields are required.

List Bill Accounts

Request New List Bill Account

Contact First Name 1

Last Name 2

Entity/Business Name 3

Business Email 4

Business Phone 5


6 Send Invitation

*Required fields

The Request New List Bill Account section consists of the following:

1. Contact First Name – First name of the business contact who will complete the application for the List Bill Account.
2. Last Name – Last name of the business contact.
3. Entity/Business Name – Name of the business associated with the List Bill Account.
4. Business Email – Email associated with the business contact.
5. Business Phone – Business contact phone number.
Note: If LB Account Holder makes updates to fields 1-5 above during the application process, they will update in ABO. Once the LB Application is submitted, no further updates can be made to these fields.
6. Send Invitation – Click on this button to submit the invitation to apply for a List Bill Account to the email provided.

Successful submission of the List Bill Account Invitation

Agent Back Office  Home Agents Customers Policies List Bill Pended Applications Thao Slonac

List Bill Accounts Collapse form Download

Request New List Bill Account

testfirst

testlast

testcompany

test@me.com

(414) 512-4545

List Bill application request sent successfully!
Click [here](#) to see application status.

Send Invitation

*Required fields

| Business Name | Contact Name | Business Phone | Business Email | Status | CreateDate | Listbill Account # |
|-------------------|------------------|----------------|---------------------------|-------------|------------|--------------------|
| adad | Asdasd, Asd | (111) 111-1111 | ss@g.com | Invite Sent | 11/26/2019 | |
| asda | Dasd, As | (111) 111-1111 | sss | Invite Sent | 11/26/2019 | |
| asda | Dasd, As | (111) 111-1111 | sss | Invite Sent | 11/26/2019 | |
| dasd | As, Asd | (111) 111-1111 | asd | Invite Sent | 11/26/2019 | |
| JS | Smith, John | (612) 316-5955 | JS@g.com | Invite Sent | 11/26/2019 | |
| DAL | Lopez, Daniel | (661) 112-2315 | DAL@gmail.com | Invite Sent | 11/26/2019 | |
| JohnSmith company | Smith, John | (666) 666-6666 | John@smith.com | Invite Sent | 11/26/2019 | |
| a | A, A | a | a | Invite Sent | 11/25/2019 | |
| d | S, S | d | dasf | Invite Sent | 11/25/2019 | |
| s | S, A | d | d | Invite Sent | 11/25/2019 | |
| s | S, A | d | d | Invite Sent | 11/25/2019 | |
| Easy | Test, Lynne | (414) 908-2122 | LDtest1@gmail.com | Approved | 11/22/2019 | 366409 |
| Easy 2 | Test, Alyssa | (414) 908-2122 | LDTest1@gmail.com | Invite Sent | 11/22/2019 | |
| Coaching | Dev, Jake | (414) 908-1414 | jdtest@gmail.com | In-review | 10/22/2019 | |
| October Test | TestOctober Test | (414) 908-2122 | lynnedevincenzo@yahoo.com | Invite Sent | 09/30/2019 | |

Showing 1 to 100 of 152 entries Previous 1 2 Next

Upon clicking Send Invitation button, a 'List Bill application request sent successfully' message will display. This indicates a successful submission of the invitation. If required fields are missing, an error message will display with resolution instructions.

Client Next Steps in List Bill Application

- Email Generation



Vision Group

5/8/2020

1

Hello Alyssa Test,

██████████ has invited you to open a List Bill Account with National General Accident & Health. Your next step is to complete the online application. Below is your personalized link for completing the application and submitting a request for a new List Bill Account for Vision Group.

2 **Register**

1. Select "Register a New Account" (Blue button)
2. Enter your email address
3. Select a password
4. Select "Register" (Green button)
5. You will land on the Application page

The application process will take approximately 10-15 minutes to complete. Once you submit your completed application we will review your request and notify you by email when the account is set up for Vision Group.

3

If you have any questions, please contact us at NGAHLlistBill@ngic.com, or 833-745-0340, or contact your agent.

██████████

Thank you for your interest in National General, we looking forward to serving your group's health insurance needs.

National General >>
Accident & Health

Have questions?
phone: 833-745-0340
email: NGAHLlistBill@ngic.com
National General is committed to helping you make the most of your group's benefits.

Following the successful submission of the List Bill Account Invitation, an email will be sent to the Business Email provided.

1. Salutation – The name of the Business Contact provided in the invitation.
2. Register – Application link, specific to the business provided.
3. Contact Information – National General contact information for questions.

➤ Registration

National General >>
Auto, Home & Health Insurance

2 Sign in to your NatGen account

Email

Password

Remember me?

4 Sign In ➔

3 [Forgot your password?](#)

1 Don't have an account yet?

Register here for access to National General Accident & Health Member Portal.

[+ Register a new account](#)

Upon clicking the Register button, the applicant will be directed to the registration page where they create a National General account and gain access to the online application.

1. Don't have an account yet? – First time user registration.
2. Sign in to your NatGen account – Existing users fill in email and password.
3. Forgot your password? – Link to reset password.
4. Sign In – Confirms sign-in credentials for existing users and directs them to the Application.

➤ Sample List Bill Application



- Home
- Members
- Documents
- Billing
- Account Details
- Sign Out

List Bill Application

ACCOUNT OWNER INFORMATION

Entry Name
fast start

Tax ID/EIN Number of eligible participants

Desired Effective Date

First Name: kelli Last Name: quick

Address Line 1 Address Line 2

City State: Select Zip Code

Daytime Phone Number: 1231231234 Alternate Phone Number

Email Address: lynne.devincenzo@ngic.com

BILLING ADMINISTRATOR INFORMATION

Is Billing Administrator contact same as List Bill Account contact

Billing First Name Billing Last Name

Is Billing/Mailing Address same as List Bill Account Address

Address Line 1 Address Line 2

City State: Select Zip Code

Daytime Phone Number Alternate Phone Number

Once the LB Account Holder completes and submits the Application, the LB Group remains in the List Bill Accounts page of ABO with a status of 'In-review'.

Once approved, the status will change to Approved and a List Bill # will display.

List Bill Q & A

List Bill Account – Commonly Asked Questions

Q. Who is eligible for a List Bill Account?

A. List Bill is available to employer and non-employer groups with 2 or more members. Group eligibility will be reviewed upon submission of the completed List Bill Account application.

Q. How does someone set up a List Bill Account?

A. Interested applicants are sent an email invitation from their agent that includes a personalized link they can use to access the List Bill Account application.

Q. Where do List Bill Account Owners access the List Bill Account information?

A. Once the group has an active List Bill Account, List Bill Owners can access their account information at www.listbill.mynatgen.com. They will need to enter the user name and password they created when they set up their List Bill Account.

Q. How do members enroll for coverage under a List Bill Account?

A. When enrolling List Bill clients, your agent needs to select the List Bill button in the shopping cart before selecting 'Enroll Now'.

Q. What are the available effective dates for policies under a List Bill Account?

A. List Bill policies must begin the first day of the month.

Q. Are there any product limitations for List Bill Account members?

A. Yes.

- National General Accident & Health Short Term Medical plans are not available with the List Bill option. Short Term Medical plans are available with our standard individual billing options.
- Non-National General products are not available with the List Bill option.
- There are also some state specific restrictions:
 - In Arkansas, List Bill is not available for the following products: TrioMed, Plan Enhancer, Cancer Heart Stroke, Hospital Expense Protection, or National General Foundation Health Enhanced sales.
 - In Massachusetts, Utah and Wyoming, List Bill is not available with National General Foundation Health Enhanced.

Q. What type of Payment Methods can be used to pay for List Bill Accounts?

A. The following Payment options are accepted:

- Bank Account – Checking or Savings
- Credit Card – Visa, MasterCard, Discover or American Express

Q. What is the billing schedule for List Bill Accounts?

A. List Bill Accounts are billed on a monthly basis.

- List Bill Account Owners receive an email notification when their monthly invoice is ready for viewing in the List Bill Account Portal. The subject line will read "Your invoice is ready".
- List Bill Account Owners receive a preliminary invoice on the 10th of each month, or the prior business day if the 10th is not a business day.
- List Bill Account Owners will receive a final invoice notification and payments will be drafted on the 15th of each month, or the next available business day if the 15th is not a business day.
- List Bill Account Owners can request updates to their List Bill invoices after they receive the preliminary invoice as long as it is before the draft date. Changes can be requested by email to NGAHLlistBill@ngic.com, or by calling 833-745-0340. Changes will be reflected on the next generated invoice.
- If an invoice change request is received after the final invoice notification and payment draft, an adjustment will be made on the following invoice cycle.

Q. What happens if a monthly ACH (or Credit Card) payment fails?

A. If the monthly ACH draft fails, the National General List Bill team will reach out to the List Bill Owner to reconcile the payment due. If the payment is not received in a timely manner and policies are at risk of cancellation, the List Bill Account members will be notified via email from us, of the upcoming policy lapse.

If the policy lapse notices are emailed to members, your List Bill Account members will have the opportunity to move to a direct payment method, or choose to let their coverage terminate for reasons of non-payment by the List Bill Account Owner.

Q. What happens if a List Bill Account member no longer is employed by their List Bill Group?

A. Members are provided an option to keep their coverage. If they choose to keep their coverage, they must contact us with new payment information.

Q. Who do List Bill Account Owners contact if they have questions relating to a List Bill Account?

A. List Bill Account Owners should contact the National General List Bill department at 833-745-0340, or email to NGAHLlistBill@ngic.com. A List Bill service team member will respond within 48 hours. Inquiries are responded to in the order in which they are received.

Pended Applications

The Pended Applications page displays applications that are pending. When you first navigate to this page, there are no results. Click Apply to see all your downline hierarchy's pended applications OR enter filter option(s) to narrow your search.

Some things to note with this section:

- App # - Must be an exact match.
- Enroller ID
 - Must be an exact match.
 - Tree option – Check to see pended applications for downline hierarchy of Enroller ID entered.
- All policies will be shown for both TIC and NHIC sales as long as the NPN matches on your agent profiles.
 - Example: You have Enroller ID 12345 for TIC and 67890 for NHIC. You sold customer John STM and customer Jane Dental Indemnity. On both agent profiles, you have the same NPN. When you look at your policy list, both John and Jane will display.
- Create Date Start
 - Enter in a Create Date Start to bring back all pended applications created from that date and later.
 - Can be used in conjunction with Create Date End to search by a date range.
- Create Date End
 - Enter in a Create Date End to bring back all pended applications created through that date.
 - Can be used in conjunction with Create Date Start to search by a date range.
- Status (select from dropdown)
 - Pending – Application is pending due to open referrals.
 - Expired – The offer period has expired. Application is canceled.
 - Ineligible – Applicant not eligible for coverage. Application is canceled.

- Incomplete – Application has been marked Incomplete.
- Status Reason (select from dropdown)
 - Requires Attestation
 - Pending Eligibility
 - Not Eligible
 - Requires Acceptance
 - New Offer Acceptance
 - STM Offer Acceptance
- Resend Email
 - Status Reason of 'Requires Attestation' includes a 'Resend Email' link to complete the attestation on Member Portal.

Agent Back Office >> [Home](#) [Agents](#) [Customers](#) [Policies](#) [List Bill](#) [Pended Applications](#) Thao Slonac

Pended Applications List Collapse filters Download

Filter options

Apply Clear

App #

Last Name

First Name

Enroller Id Tree ?

Agent Last Name

Agent First Name

State

Create Date Start

Create Date End

| App # | Application Status | Status Reason | Not Eligible Applicant | Offer Expiration | Last Name | First Name | Send Email | Gender | Tobacco Use |
|----------|--------------------|----------------------|------------------------|------------------|-----------|------------|------------------------------|--------|-------------|
| 10000001 | Pending | Requires Attestation | John Smith | 2018-12-31 | Smith | John | Resend Email | Female | No |
| 10000002 | Pending | Requires Attestation | Jane Doe | 2018-12-31 | Doe | Jane | | Male | No |
| 10000003 | Pending | Requires Attestation | John Doe | 2018-12-31 | Doe | John | | Female | No |
| 10000004 | Pending | Requires Attestation | John Doe | 2018-12-31 | Doe | John | | Female | No |
| 10000005 | Pending | Requires Attestation | John Doe | 2018-12-31 | Doe | John | | Female | No |
| 10000006 | Pending | Requires Attestation | John Doe | 2018-12-31 | Doe | John | | Female | No |
| 10000007 | Pending | Requires Attestation | John Doe | 2018-12-31 | Doe | John | | Female | No |
| 10000008 | Pending | Requires Attestation | John Doe | 2018-12-31 | Doe | John | | Female | No |
| 10000009 | Pending | Requires Attestation | John Doe | 2018-12-31 | Doe | John | | Female | No |
| 10000010 | Pending | Requires Attestation | John Doe | 2018-12-31 | Doe | John | | Female | No |
| 10000011 | Pending | Requires Attestation | John Doe | 2018-12-31 | Doe | John | | Female | No |
| 10000012 | Pending | Requires Attestation | John Doe | 2018-12-31 | Doe | John | | Female | No |
| 10000013 | Pending | Requires Attestation | John Doe | 2018-12-31 | Doe | John | | Female | No |
| 10000014 | Pending | Requires Attestation | John Doe | 2018-12-31 | Doe | John | | Female | No |
| 10000015 | Pending | Requires Attestation | John Doe | 2018-12-31 | Doe | John | | Female | No |
| 10000016 | Pending | Requires Attestation | John Doe | 2018-12-31 | Doe | John | | Female | No |
| 10000017 | Pending | Requires Attestation | John Doe | 2018-12-31 | Doe | John | | Female | No |
| 10000018 | Pending | Requires Attestation | John Doe | 2018-12-31 | Doe | John | | Female | No |
| 10000019 | Pending | Requires Attestation | John Doe | 2018-12-31 | Doe | John | | Female | No |
| 10000020 | Pending | Requires Attestation | John Doe | 2018-12-31 | Doe | John | | Female | No |
| 10000021 | Pending | Requires Attestation | John Doe | 2018-12-31 | Doe | John | | Female | No |
| 10000022 | Pending | Requires Attestation | John Doe | 2018-12-31 | Doe | John | | Female | No |
| 10000023 | Pending | Requires Attestation | John Doe | 2018-12-31 | Doe | John | | Female | No |
| 10000024 | Pending | Requires Attestation | John Doe | 2018-12-31 | Doe | John | | Female | No |
| 10000025 | Pending | Requires Attestation | John Doe | 2018-12-31 | Doe | John | | Female | No |

Showing 1 to 100 of 1,574 entries

Previous **1** 2 3 4 5 ... 16 Next

- o Status Reason of 'Not Eligible' includes a 'Declination Email' link to resend the declination email.

Agent Back Office >> Home Agents Customers Policies List Bill Pended Applications Thao Slonac

Pended Applications List Collapse filters Download

Filter options

Apply Clear

App #

Last Name

James

Enroller Id Tree

Agent Last Name

Agent First Name

State

Create Date Start

Create Date End

| App # | Application Status | Status Reason | Not Eligible Applicant | Offer Expiration | Last Name | First Name | Send Email | Gender | Tobacco Use | Date of Birth |
|-------|--------------------|-------------------|------------------------|------------------|-----------|------------|-----------------------------------|--------|-------------|---------------|
| | Applied | Not Eligible | James Slonac | 06/15/2020 | Slonac | James | Declination Email | Male | No | 06/15/1966 |
| | Applied | Not Eligible | James Slonac | 06/15/2020 | Slonac | James | Declination Email | Male | No | 07/18/1969 |
| | Applied | Reason Incomplete | James Slonac | 06/15/2020 | Slonac | James | | Male | No | 07/18/1969 |
| | Applied | Reason Incomplete | James Slonac | 06/15/2020 | Slonac | James | | Male | No | 07/18/1969 |
| | Applied | Not Eligible | James Slonac | 06/15/2020 | Slonac | James | Declination Email | Male | No | 08/18/1962 |
| | Applied | Not Eligible | James Slonac | 06/15/2020 | Slonac | James | Declination Email | Male | No | 01/28/1966 |
| | Applied | Not Eligible | James Slonac | 06/15/2020 | Slonac | James | Declination Email | Male | No | 06/23/1962 |
| | Applied | Not Eligible | James Slonac | 06/15/2020 | Slonac | James | Declination Email | Male | No | 02/23/1977 |
| | Applied | Not Eligible | James Slonac | 06/15/2020 | Slonac | James | Declination Email | Male | No | 02/23/1977 |
| | Applied | Reason Incomplete | James Slonac | 06/15/2020 | Slonac | James | | Male | No | 08/07/1984 |
| | Applied | Reason Incomplete | James Slonac | 06/15/2020 | Slonac | James | | Male | No | 08/07/1984 |
| | Applied | Reason Incomplete | James Slonac | 06/15/2020 | Slonac | James | | Male | No | 08/07/1984 |
| | Applied | Not Eligible | James Slonac | 06/15/2020 | Slonac | James | Declination Email | Male | No | 11/06/1960 |
| | Applied | Not Eligible | James Slonac | 06/15/2020 | Slonac | James | Declination Email | Male | No | 11/07/1962 |

Showing 1 to 20 of 20 entries Previous 1 Next

- Results List – Click on App # to see the Application Details.

Pended Application Details

Upon click of App # link in the results list, you will be navigated to the Pended Application Details page.

Agent Back Office >>
Home
Agents
Customers
Policies
List Bill
Pended Applications

[Back to Pended Apps List](#) 1

Fox, Amanda
Application Number: 731790309

Contact

(440) 371-1549
AMANDAFOX1004@GMAIL.COM
06/03/2020

Information

01/05/1983 (37 Yrs. old)
Male
No
Troy Joseph Call (244359)

Address

3814 PARKSIDE CIRCLE EAST
LORAIN, OH 44053

SHORT TERM MEDICAL PPO

App Number: 731790309

Product Id: 5000

Product Category: SHORT TERM MEDICAL PPO

Benefit: ENHANCED PPO - \$5,000 100/0

Issue State: OH

Legal Entity: NHIC

Enroller Id: 244359

Agent Label: Troy Joseph Call

Company: HEALTHCARE SOLUTIONS TEAM LLC

App Status: Ineligible

Status Reason: Not Eligible

Offer Expiration: 06/03/2021

Create Date: 06/03/2020

Effective Date: 06/03/2021

Termination Date: 06/02/2022

Monthly Premium Total: \$254.75

Quoted rate: \$254.74

Eligible Tier - Primary: STANDARD

Eligible Tier - Spouse: STANDARD

Submission Source: QUOTIT CUSTOMER

Partner Application ID: 2042052

[Declination Email](#)

In addition to the high level customer/policy details, the Pended Application Details page includes the following:

1. Back to Pended Apps List – This link takes you back to the Pended Applications List page.
2. Preferred Status (only applies to Short Term Medical applications)
 - a. Quoted rate
 - b. Eligible Tier

Sign Out

Please be sure to Sign Out after you are finished.

The screenshot shows the 'Agent Back Office' interface. At the top is a navigation bar with links for Home, Agents, Customers, Policies, List Bill, and Pended Applications. Below this is a header area with a 'Back to Pended Apps List' link and a user profile dropdown menu. The dropdown menu includes options for 'View Profile', 'Change Password', and 'Sign Out' (highlighted in yellow). The main content area displays a user profile with three columns: 'Contact' (phone, email, date), 'Information' (gender, marital status), and 'Address'.

| Contact | Information | Address |
|---|---|----------------------------|
| <p>Phone: [Redacted]</p> <p>Email: [Redacted]</p> <p>Date: 06/03/2020</p> | <p>Gender: Female</p> <p>Marital Status: No</p> | <p>Address: [Redacted]</p> |

General Information

- If you experience problems trying to access ABO, try CTRL + F5 to clear the cache. The process to clear the cache may also remove your 'Remember Me' Sign In, so this will need to be re-selected if it has been cleared.
- Data updated periodically throughout the day.
- Agents need to be in an Active arrangement in order to access ABO.
- Customer List count vs Policy List count
 - The number of customers should be less than or equal to the number of policies because customers often buy more than one policy.
- ABO times out after one hour of inactivity.
- Online lists scroll horizontally to accommodate additional columns.
- Online lists can be sorted on any column by clicking on the column name/heading.
 - Default sort is Create Date (newest to oldest).
 - Click on a column header to change the sort of that column.
 - The arrow indicates the direction of the sort (ascending or descending).
- If Tab text or text within a tab is Black, information is Active. If Tab text or text within a tab is Red, information is Inactive.