

SMU 2.0 Broker Custom URL Video Transcript

This is the second video walk through which will focus on the new custom URL with broker or further information on the SMU customize page.

In this walkthrough, the custom URL workflow will be presented.

On the broker dashboard, you can go to the custom URL's tab and click the generate URL link.

From here, you can select the state and firm that you want to associate with the URL. Then click the generate URL button.

You can copy the URL and share it with the consumer using the copy URL button.

This page shows the custom URL in the browser address bar.

Once the consumer opens the URL in a browser window, they will see the details of the broker.

Last year, the consumer could not see the broker details on the first page of the custom URL. The consumer can already see the broker information details and move ahead with the process.

Brokers will have to inform the consumer to provide all the necessary information such as the zip code and county.

On this screen, the consumer enters the correct zip code and county then clicks the submit button.

Note, if the consumer creates a new account or signs in, the broker details will be lost or not all the broker details will be carried over and attached to the application.

On this screen, the consumer clicks the custom URL to see the broker details, selects the plan year and provides the zip code and family composition then the consumer clicks the get my quote button.

From here, the consumer can select the plan that suits them by clicking the choose plan button then they can say yes or no to the dental option.

At this point, the consumer can apply for this plan by clicking the apply button the system will again give the consumer an opportunity to create an account or sign in.

The consumer can either register or sign in to their account.

At this point, the broker information will be carried over or attached once the consumer registers or signs in.