

Agent Onboarding Guide

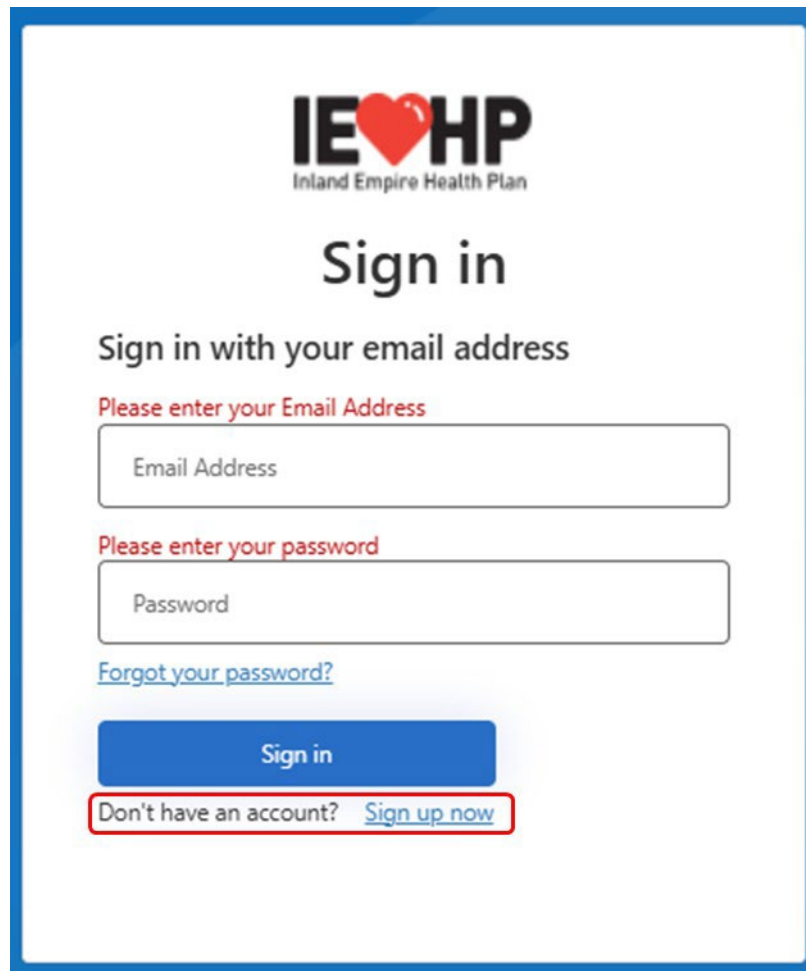
Welcome to the Agent Portal. This guide outlines the steps to register and complete the onboarding process on the platform. Please follow each step carefully to ensure a successful completion of the onboarding activities.

1. Access Portal Here:

- Click on [Your New Microsoft Agent Onboarding Portal](#).
- You will land on the Sign In page.

2. Create a New Account

- Click on **Sign up now** at the bottom of the Sign in box.



IEHP
Inland Empire Health Plan

Sign in

Sign in with your email address

Please enter your Email Address

Please enter your password

[Forgot your password?](#)

Sign in

Don't have an account? [Sign up now](#)

Figure 1: Agent Portal Sign in Page

3. Enter Email for Verification

- Type in your email address.
- Click the Send Verification Code button.
- A verification code will be sent to your email inbox.

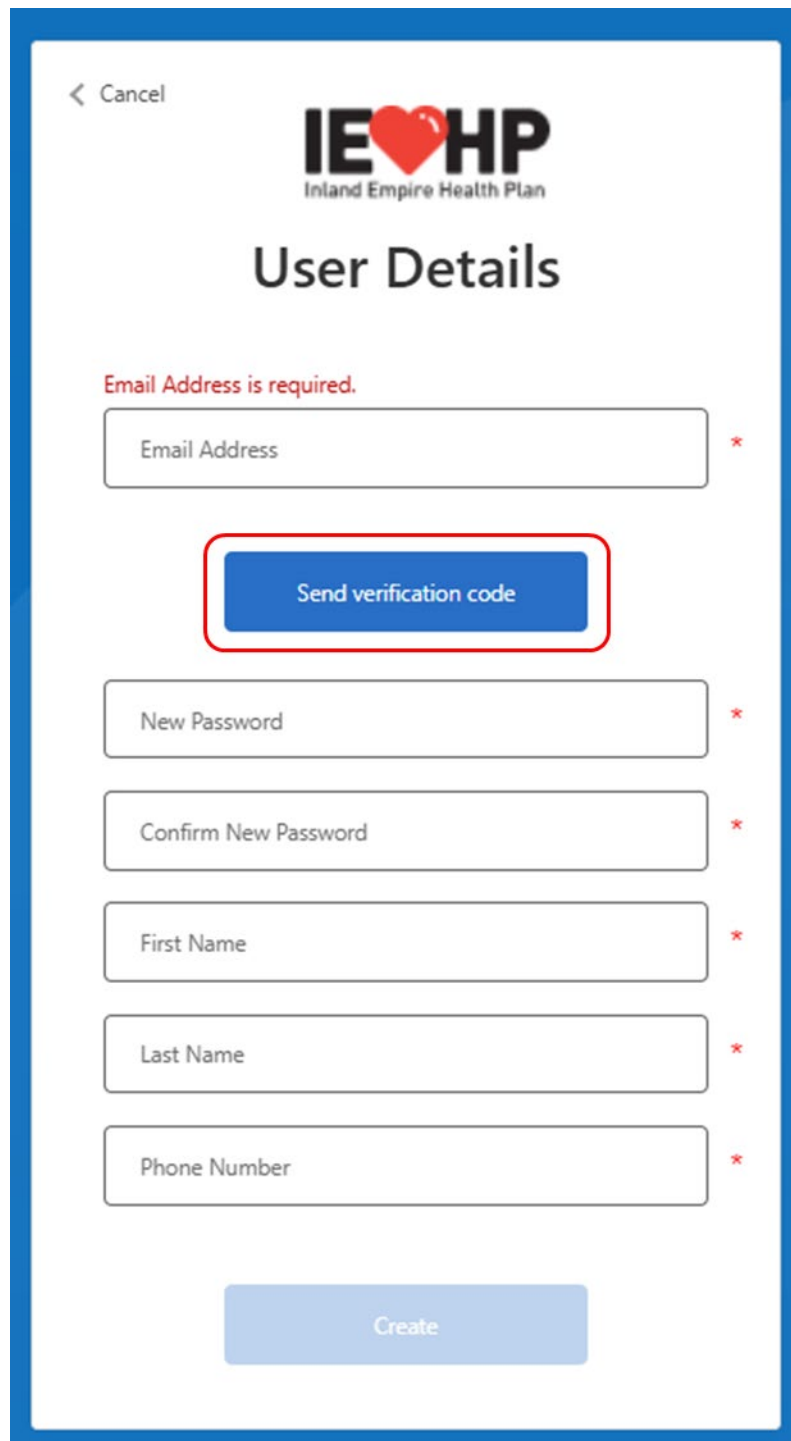
A screenshot of the 'User Details' sign-up page for IEHP. The page has a blue border and a white background. At the top left is a '< Cancel' link. The IEHP logo (Inland Empire Health Plan) is centered at the top. Below the logo is the title 'User Details'. A red error message 'Email Address is required.' is positioned above the 'Email Address' input field. The 'Email Address' field has a red asterisk to its right. Below this field is a blue button with the text 'Send verification code', which is highlighted by a red rounded rectangle. Below the button are five more input fields, each with a red asterisk to its right: 'New Password', 'Confirm New Password', 'First Name', 'Last Name', and 'Phone Number'. At the bottom of the form is a light blue button labeled 'Create'.

Figure 2: Agent Sign up Page

4. Verify Your Email

- Check your email for the verification code from IEHP MS Dynamics (including spam/junk folders)
- Enter the code in the textbox and click **Verify Code**.
- If not received, click **Send new code** to retry.

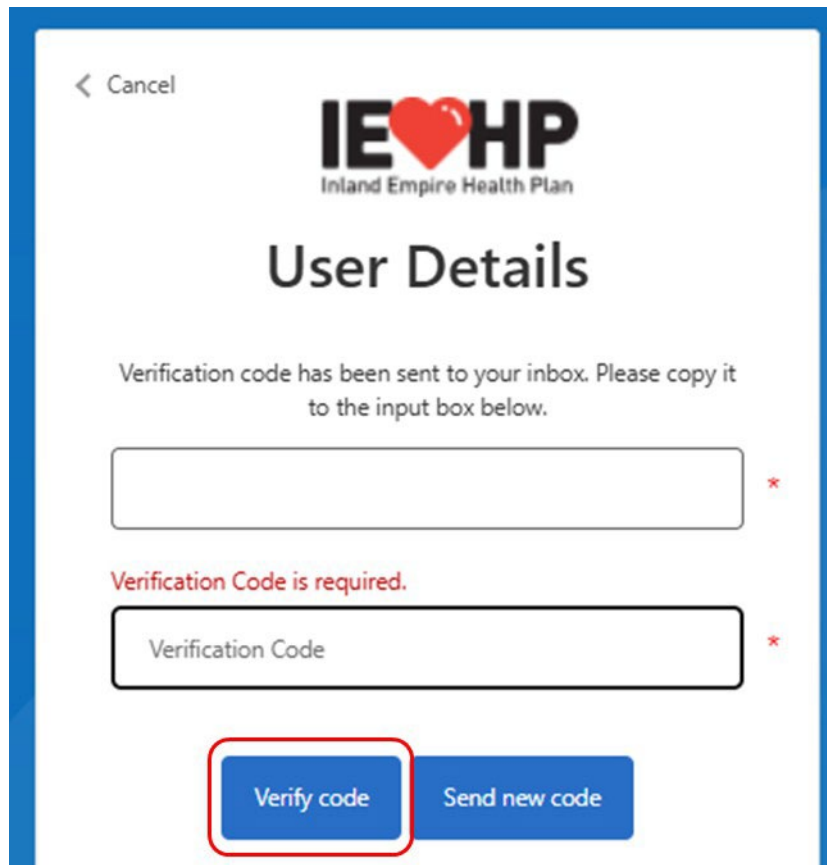
The screenshot shows a mobile app interface for 'User Details' under the IEHP (Inland Empire Health Plan) logo. At the top left is a back arrow and the word 'Cancel'. The title 'User Details' is centered. Below it, a message states: 'Verification code has been sent to your inbox. Please copy it to the input box below.' There are two input fields. The first is empty and has a red asterisk to its right. The second is labeled 'Verification Code' and also has a red asterisk to its right. Above the second field, the text 'Verification Code is required.' is displayed in red. At the bottom, there are two blue buttons: 'Verify code' and 'Send new code'. The 'Verify code' button is highlighted with a red rounded rectangle.

Figure 3: Agent verification code

5. Complete Your Profile

- Enter the following information:
 - Password and confirm it
 - First Name
 - Last Name
 - Phone number
- Click **Create** once all fields are filled in.

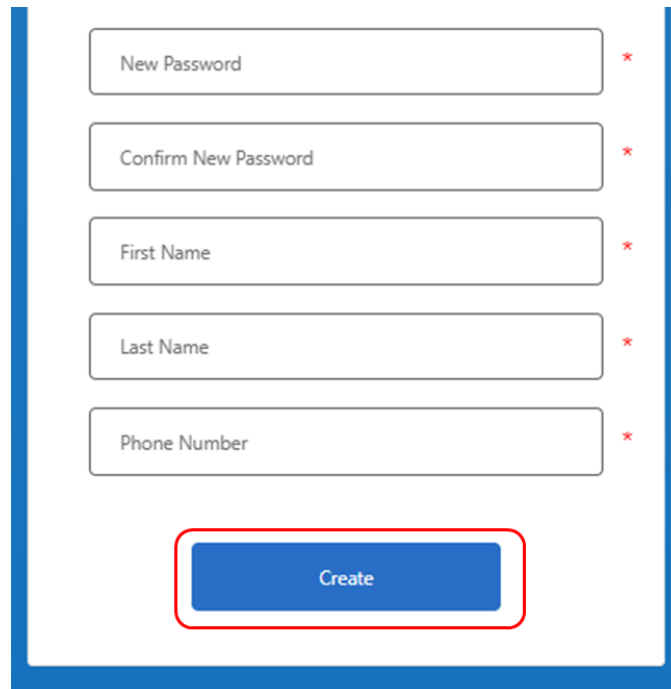
The image shows a sign-up form for the Agent Portal. It is enclosed in a blue border. The form contains five input fields, each with a red asterisk to its right: 'New Password', 'Confirm New Password', 'First Name', 'Last Name', and 'Phone Number'. Below these fields is a blue button with the text 'Create', which is highlighted by a red rectangular border.

Figure 4: Agent Portal Sign up

6. Sign in

- You will be redirected to the **Sign in** page. Type out the email address and password.
- Click on **Sign in**

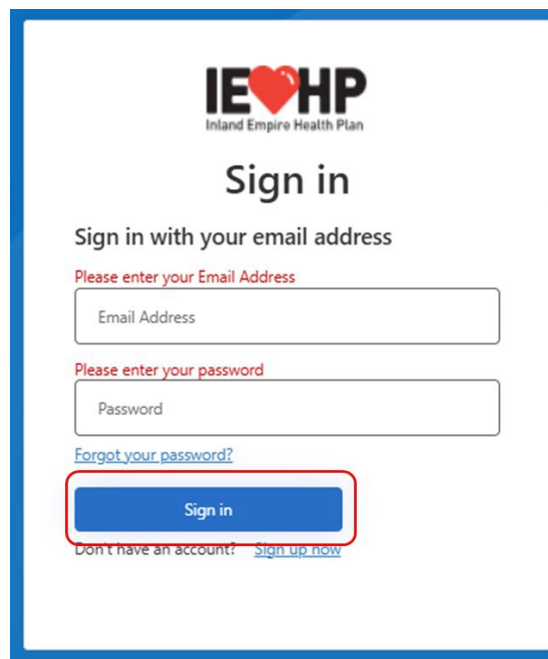
The image shows the sign-in page for the Agent Portal. It features the IEHP logo (Inland Empire Health Plan) at the top. Below the logo is the heading 'Sign in'. Underneath, it says 'Sign in with your email address'. There are two input fields: 'Email Address' and 'Password', each with a red prompt above it: 'Please enter your Email Address' and 'Please enter your password'. Below the password field is a blue link that says 'Forgot your password?'. At the bottom, there is a blue button with the text 'Sign in', which is highlighted by a red rectangular border. Below the button, it says 'Don't have an account? [Sign up now](#)'.

Figure 5: Agent Portal Sign in Page

7. Start the Intake Form

- Upon registration, you will be redirected to the Agent Portal.
- Click **Start Here** to begin the intake form.

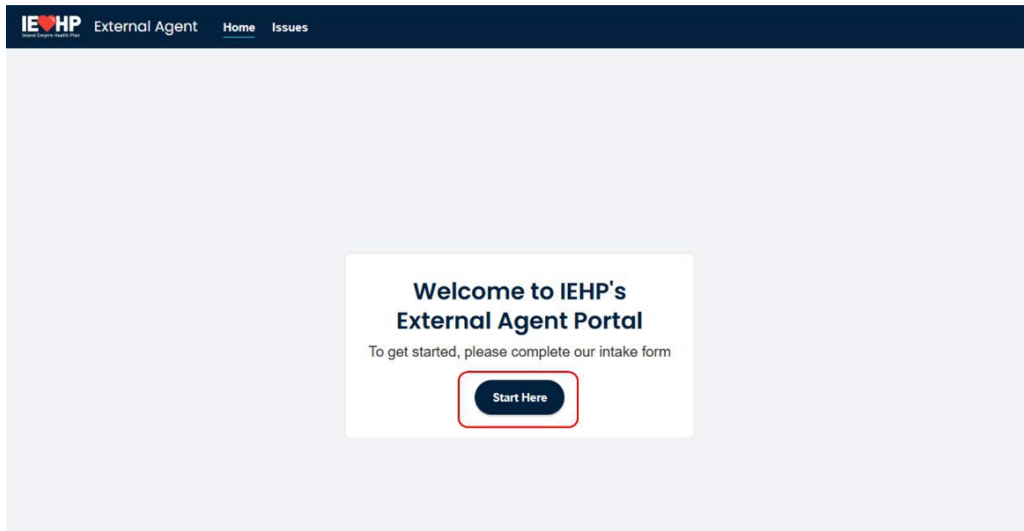


Figure 6: Agent Portal Homepage

8. Completing the Intake Form

- The form contains **5 pages**.
- Fields marked with a red asterisk (*) are mandatory.
- Read and respond to each question carefully.
- Upload documents where required.

Figure 7: Agent Portal Intake Form

9. Saving Progress and Navigation

- Click **Save** at the bottom of each page to retain your inputs.
- Use **Next** and **Previous** buttons to navigate between pages.

The screenshot displays a web form interface. At the top, there is a large, empty rectangular input field. Below this, question 23 asks, "23. Do you have a call center (Sales and/or Service)? If yes, please describe." It features two radio button options: "Yes" and "No". Question 24 follows, asking, "24. Do you have enrollment commitments with other carriers? If yes, please describe." It also has "Yes" and "No" radio button options. A red text note below the questions states, "All fields marked with * are required." At the bottom of the form, there are three dark blue buttons: "Save" on the left, and "Previous" and "Next" on the right.

Figure 8: Agent Portal Intake Form

10. Submitting the Intake Form

- After completing all mandatory fields, click **Submit** on Page 5.
- A success message will confirm submission.
- **Note:** If required fields are missing, error messages in red will appear at the bottom of the page. Address them and submit.

IEHP
Island Engine Health Plan

External Broker

Home Book of Business Issues

50. Has any lawsuit or claim ever been made against your surety company, or Errors and Omissions (E&O) insurer, arising out of your sales or practices, or have you or your company been refused surety bonding or E&O coverage?

☐ Yes

☐ No

51. Do you have additional cyber security insurance?*

☐ Yes

☒ No

52. Are you willing to acquire additional cyber security insurance?

☐ Yes

☐ No

Save Previous Submit

Figure 9: Agent Portal Intake Form Submission

11. Post Submission

- You will be redirected to a page that displays a detailed success message.
- Responses can be exported to PDF for record-keeping.
- You may then explore other sections of the portal.

IEHP
Island Engine Health Plan

External Agent

Home Issues

Thank you for submitting the Intake form!

Your Broker Sales Manager will reach out to guide you through next steps. If you have any questions please contact onboarding team at: BrokerServices@iehp.org or 844-264-4347 You can view your responses or download a copy using the links below:

View Form Download Responses

Figure 10: Intake Form Submission Success

Need Assistance?

If you encounter any issues during the process, please contact the onboarding support team at: BrokerServices@iehp.org or 844-264-4347.