Agents, Join the Ameritas Portal

View and manage your business at your convenience

Register for the Ameritas producer portal for 24/7 access to your block of business and commission statements.



Get started

- 1. Go to producerportal.ameritas.com.
- 2. Click Register.
 - a. Name: If you are assisting an agent, please register using your own name.
 - b. **Agent/Agency ID:** The Agent ID is in your email notice. To access commissions paid to an agency, you must register with your Agency ID instead.
 - i. Do not use the first three digits of your ID when registering, such as 010 or 026
 - c. **ZIP Code:** Enter your Business ZIP Code.
- 3. Create User ID, verify email address, and finish creating your account.
 - a. Email: Separate email addresses are needed for each registration.

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What you'll find

- Set up EFT commission payments (if applicable).
- See your block of business.
- View and download commission statements (if applicable).
- Order ID cards, send a secure email with ID cards attached, or email instructions on how to access ID cards online.
- Quick links to help find a dental provider or review network listings.



Want help?

- **Portal:** Agent services can help with portal functionality and navigation questions. If you need help registering, call 855-517-5307, option 4, email <u>agentservices@ameritas.com</u>, or complete the online form at <u>explore.ameritas.com/onboarding</u>. Once you've registered and logged in, a chat feature is available from 8:30 a.m. 4 p.m. Monday Friday (Central Time).
- **Product:** For questions about individual product details, you can use the chat feature on <u>myplan</u>. <u>ameritas.com</u> to talk to a member of the sales connect team. They are also available by phone and email at 888-336-7601 or <u>salesconnect@ameritas.com</u>.
- Member account: Contact the administration team at 800-300-9566, option 3, or <u>cs@ameritas.com</u> for help with client account, billing, and payment questions.



Tips for managing your individual business.



Access your individual dental and vision shopping link

Once you are logged in to the portal:

- 1. Click on the blue Quote Individual button (upper right side of dashboard)
- 2. Go to your shopping site by clicking the blue Open button, or copy your shopping link by clicking on the blue Copy Link button.

ell individual	with your Shopping L	nĸ		Create Shopping Link
	is and share with clients to get credit for the s Jual shopping site. You do NOT need to create		ate on behalf of your client by	pressing the Open button, which
Name	Link Actions	Date Created		



Share your Ameritas shopping link

- Hyperlink content within your emails and on your website to link to your unique URL
- Make your logo on websites clickable so it opens your shopping link
- Create a QR code using the QR generator of your choice
 - For example, qr-code-generator.com

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Share specific plan designs and rates

- 1. Go to your shopping site, enter the prospect's ZIP Code, and answer the plan coverage questions
- 2. Select the Compare box next to the plans you want to share or compare
- 3. Click the blue Compare Plans button
- 4. Choose to download or share the comparison
 - a. If sharing, enter the prospect's email address and it will appear from your email address



Find your individual cases

Once you are logged in to the portal:

- View alerts when new cases are issued (within 24 hours of enrollment)
- Customize your dashboard with filters for individual and group business
- Under the Inforce Block menu (1), go to Individual cases (2), and search for policyholders (3)
 - Only the first three characters are needed to search, so you don't need to perfectly match the name they used at enrollment or their policy number.

Overview	Compensation .	Inforce Block Tra	cking Status Ale	erts	
Inforce B	lock	1			
Group Cases	Individual Cases	Upcoming Renewals			
Search	2		Search By		
Enter Policyho	lder	Q	Policyholder	\sim	Search



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