

# AP Connect — Frequently Asked Questions

September 2019

## What are the biggest improvements we will see in AP Connect?

Advanced Professionals has taken the best features of the Benefit Resource Hub (HUB) and comments and requests from our producers to create our new end-to-end producer portal, [AP Connect](#).

Great New Features	Popular Features We've Kept
<b>Community-rated small-group proposals in minutes</b>	24/7 access for proposal submissions and plan materials
<b>Seamless transition from proposals to new business submission</b>	Access to pricing for all Washington state community-rated small-group health plans and 24 industry health trusts
<b>Upgraded census submission process and user interface</b>	One point of access for multiple RFPs
<b>Coverage elections transmit automatically to GMA</b>	Unmatched customer service
<b>On-screen tutorial with 24/7 access</b>	Complimentary training and education
<b>RFPs, renewals and new business now on one platform</b>	Freedom of access to all levels of insurance professionals in each Producer practice

## Top 5 AP Connect Questions

**Q Is there a preferred internet browser to use when accessing AP Connect?**

**A Google Chrome and Firefox** are the preferred browsers to use when accessing AP Connect. **Do not use Internet Explorer.**

**Q Is it possible to view my proposals through AP Connect?**

**A** Yes, your proposals may now be accessed via AP Connect. Proposal notifications still will be emailed to the producer who submitted the request for proposal (RFP). Please be aware that all support staff also will have access to all proposals within their producer house.

**Q Why does my proposal not include all of the Trusts I'd like to see quoted?**

**A** If you need to double-check whether you used the correct NAICS code, click "Previous" to go back to the "Company Information" page, knowing that all information already entered will be saved. **Do not click your browser's back arrow as it will not save your information.**

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## **Q How do I download proposals in AP Connect?**

**A** Click the “download proposal” link to view the proposal, then follow your internet browser’s directions to download the document as a PDF. As an alternative, you may right-click on the proposal, select “Print,” then click “Save as PDF.”

## **Q How do I access the program-specific resources?**

**A** To access program-specific resources – such as forms, plan summaries and booklets, producer reference tools, directories and more – click on “Program Resources” in the top menu of AP Connect, which will open into a drop-down menu showing all available programs. Once you click on your chosen program, a separate window will open up showing all available resources.

## **Logins and Permissions**

### **Q Who should request a login to AP Connect?**

**A** Each producer and support staff should request their own login using their own unique email address and login. Shared accounts cannot be supported.

### **Q How do I obtain new logins for additional producers/support staff at my producer house?**

**A** Send all requests to [APConnect@advprofessionals.com](mailto:APConnect@advprofessionals.com). Please use the [Producer House Contact Update Excel spreadsheet](#), and be sure to include the following required fields:

- Producer House Name
- First Name
- Last Name
- Email Address
- Role (specify Producer or Support)

### **Q How do I log in to AP Connect?**

**A** After your producer house submits the [Producer House Contact Update Excel spreadsheet](#), you will automatically receive an email with the subject line “Welcome to AP Connect.” Using your unique username provided in the email, log in and set up your password via the link in the email.

### **Q Our producer house used to share the same login. Why do we need separate logins for AP Connect?**

**A** When Advanced Professionals began building AP Connect, the goal was to create a seamless platform that would take producers and support personnel through the request for proposal (RFP), proposal, new business and renewal processes with a few clicks. That’s what we did.

Unlike the HUB, AP Connect goes far beyond RFPs and will manage the entire cycle for your groups. As a result, each person using AP Connect will need their own login. Each person, based on their role within the producer house, will have different permissions:

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## Permission System

### Producer

- Each producer within a producer house will have access to all their own RFPs, proposals, new business and renewals.

### Support Staff

- All support staff within a producer house will have access to ALL the producer accounts in their office. With their own single login, each support person can work across the entire office.

### **Q Can colleagues from my producer house access my account in AP Connect?**

**A** Producers will only have access to their own account. Support staff will be able to access all producer accounts in their producer house. If you need these permissions changed, please email [APConnect@advprofessionals.com](mailto:APConnect@advprofessionals.com).

## Closing Out the Benefit Resource Hub

### **Q Will the Benefit Resource Hub be available after the launch of AP Connect?**

**A** The Benefit Resource Hub (HUB) has been retired. Information regarding past request for proposal (RFP) submissions is available upon request to [APConnect@advprofessionals.com](mailto:APConnect@advprofessionals.com).

### **Q I've bookmarked the Benefit Resource Hub. Can I still use this bookmark?**

**A** Yes, the URL for the HUB has been redirected to AP Connect. However, we recommend you replace that bookmark as soon as possible with [APConnect.advprofessionals.com](http://APConnect.advprofessionals.com) for your own convenience.

### **Q What happens to my active RFP submissions when I log in to AP Connect?**

**A** Because we have switched to a new platform, your active RFP submissions will not appear. If you need access to these proposals, please email [APConnect@advprofessionals.com](mailto:APConnect@advprofessionals.com).

### **Q How do I sell my active RFPs that were submitted on the HUB through AP Connect?**

**A** Send an email to the inbox for the program where you plan to sell the group or to [APConnect@advprofessionals.com](mailto:APConnect@advprofessionals.com). AP staff will then resubmit your RFP into AP Connect, allowing you to initiate the new business process.

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## New Processes

**Q Will I continue to receive the renewal proposal and accompanying renewal documents from Advanced Professionals?**

**A** Yes, you will continue to receive renewal notifications from Advanced Professionals. Information on the improved AP Connect renewal process will be sent to AP Connect users in the coming weeks.

**Q Are there any notable changes in the RFP process?**

**A** To save you time and improve accuracy, group master applications (GMAs) for new business will be filled out using information submitted in your request for proposal (RFP). **Please be sure to use your group’s full legal name in the RFP as that name will transfer directly to the new GMA.**

**Q I use a go-to-market quote distributor for requests for proposals. Will this service still be available through AP Connect?**

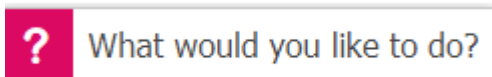
**A** Please check with your go-to-market partners to inquire whether this change will cause any potential disruptions.

## Training and Additional Information

**Q How can I get training on AP Connect?**

**A** AP Connect has a built-in tutorial to help you move through Advanced Professionals’ new producer platform with ease.

To get started, search for this “What do you want to do?” icon, located on the bottom right-hand corner of every screen:



This will open a larger window with multiple tutorial and action items. To take a tour of the entire system, click on “Take a Tour” in the menu. This will walk you through the entire platform.

### Still Have Questions?

Email [APConnect@advprofessionals.com](mailto:APConnect@advprofessionals.com) or 206.788.8979, or contact your Program Manager:

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