

# AP Connect — Frequently Asked Questions

October 2020

## What is AP Connect?

AP Connect is the end-to-end producer portal developed by Advanced Professionals Insurance & Benefit Solutions to serve the association health plan and community-rated small-group markets. **AP Connect** offers request for proposals, new business and renewals for health plans, as well as reference materials, development tools, content catalogs, detailed guides, directories and more.

New Feature Spotlight	Simplifying Your Business With ...
<b>GMA now conveniently offered in AP Connect instead of DocuSign</b>	Seamless process across platform for new business GMA completion and signatures
<b>New census enrollment template</b>	Uniform template for all programs
<b>Links to new business documents in “Tasks”</b>	All the documents you need are just a click away
<b>Coverage elections transmit automatically to GMA</b>	Decreasing your workload and improving accuracy
<b>On-screen tutorial with 24/7 access</b>	Complimentary training and education
<b>RFPs, renewals and new business GMA now on one platform</b>	Everything you need, all in one place

## Top 6 AP Connect Questions

**Q How do I access the group master application (GMA) for new business?**

**A** Login to AP Connect > Task > Group Master Application Link > View GMA Button



**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. **AP Connect does not work properly on 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.

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

**A** In order for you to access all available Trusts, you must use the proper NAICS code. 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.**

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

**A** You can find your proposals in the "RFPs" tab. 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. Remember to check your spam mail if you do not receive this e-mail shortly after submitting.

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## Q Why does our producer house need individual logins for AP Connect?

A AP Connect was created to manage the entire cycle for your groups, providing a seamless platform that takes producers and support personnel through the request for proposal (RFP), proposal, new business and renewal processes with a few clicks. As a result, each person using AP Connect will need their own login, and based on their role within the producer house, will have different permissions:

## 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).

## New Business Submissions

### Q Who can access the online GMA?

A The producer, producer support and group representative (employer) all can access the online GMA — **but not at the same time**. Also, producers can only sign the GMA after the group representative has signed.

### Q Can I partially fill out the online GMA and resume later?

A Yes, by clicking on the “Save and Next” button on the bottom of the page, we will save your info and you can pick up from where you left off when you access the online GMA

### Q My group is ready to sign the new business GMA. What do they need to do?

A AP Connect will create a login for the group representative that will be emailed to them when you enter their contact information. That login gives them access to review and sign the new business GMA via AP Connect. If the group representative is unable to login, please contact us at [GMA@advprofessionals.com](mailto:GMA@advprofessionals.com).

### Q How do I access other documents for the new business submission?

A Within the “Task” tab in AP Connect, you will find a document link for each task to download the needed forms.

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**Q How do I know that the online GMA is complete?**

**A** The GMA is completed once the group representative and producer have signed; the producer will receive a confirmation email from AP Connect. Once the GMA has been validated and processed, our team will email all parties a completed PDF copy.

**Q Who do I contact if I have questions about the GMA?**

**A** Contact [APConnect@advprofessionals.com](mailto:APConnect@advprofessionals.com) with any questions or issues signing your GMA.

**Q Are there other 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.**

## Processing a Renewal

**Q Where is my Renewal GMA?**

**A** The Renewal GMA can be accessed after confirming how the group would like to renew. To start this process, go to the “Renewals” Tab on the Navigation menu.

**Q Where are Producer Renewal Bulletins posted?**

**A** Producer Renewal Bulletins are posted in the applicable Program Resource Site under “Producer Reference Tools.”

**Q Does AP Connect allow my group to make plan changes upon renewal?**

**A** To make plan changes upon renewal, please select “Change Plans” when you download the Renewal Proposal. Once selected, confirm all plans the group would like to enroll in.

**Q A different employer contact or producer is handling the renewal this year. How do I notify the group and AP of the change?**

**A** On the “Plan Confirmation” page, you can edit or create a new employer contact. After completing the page, that user will then have access to complete the Renewal GMA. If a new producer or producer support is managing the group, now is a great time to update that as well.

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## 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?

Please keep an eye on your inbox for invitations to live and on-demand webinars. You also can email specific questions to [APConnect@advprofessionals.com](mailto:APConnect@advprofessionals.com) or request a personal training for your producer house by contacting the training manager at Advanced Professionals:

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