Producer Contracting Benefit Changes Process
PC- 36

Receiving Email
1. Producer contracting mailbox receives "Commissions Input for a Benefit Change" email.
   a. File email in the folder labeled "Benefit Changes."
   b. **Wait** for processing.
   Note: At least 10 processed daily.

Processing and Creating Routing Sheet
1. Open the email saved in the "Benefit Changes" folder.
   a. Click the link containing the group name.
   b. Open the routing sheet PDF on the SharePoint site.

Entering AE/ AM Changes for Life Products Only in ACom
1. Click the Customers tab in ACom.
   a. Enter the "Group/ Contract ID" and hit search (verify that it matches the name of the group in the request).
2. Scroll down to "Broker Roles" located in the Optional Configuration section.
   a. Verify who the current AE/ AM are and who the new AE/ AM should be (if AE/ AM matches, no further changes need to be made).
   Note: Life records will never exceed 100% combined. Split both equally to equal 100%.
3. Click "Edit", and enter the last day of the month before the change in the "Expiration Date" field.
   a. Hit "Save."
   b. Click "Copy."
   c. Enter the correct AE/ AM.
4. Input the effective date of change.
   a. Hit OK (will say "Process Complete" in bottom left hand corner).
   b. Hit Save again in order for the product line to pull up (will say –save was successful).
5. Close and verify the correction on the "Group/ Contact" detail page.
   Note: The product line should always be (Match 8) and then the product (health, life, etc.).

Processing in SharePoint
1. In SharePoint, click "Tasks" on the left menu.
   a. Select the down arrow on the "Title" column.
   b. Click "Input Commissions for Benefit Change."
   c. Search for the Group name and select "Input Commissions for Benefit Change."
   d. Click "Complete Task" in the Workflow Task pop-up window.
2. Mark the email as processed.