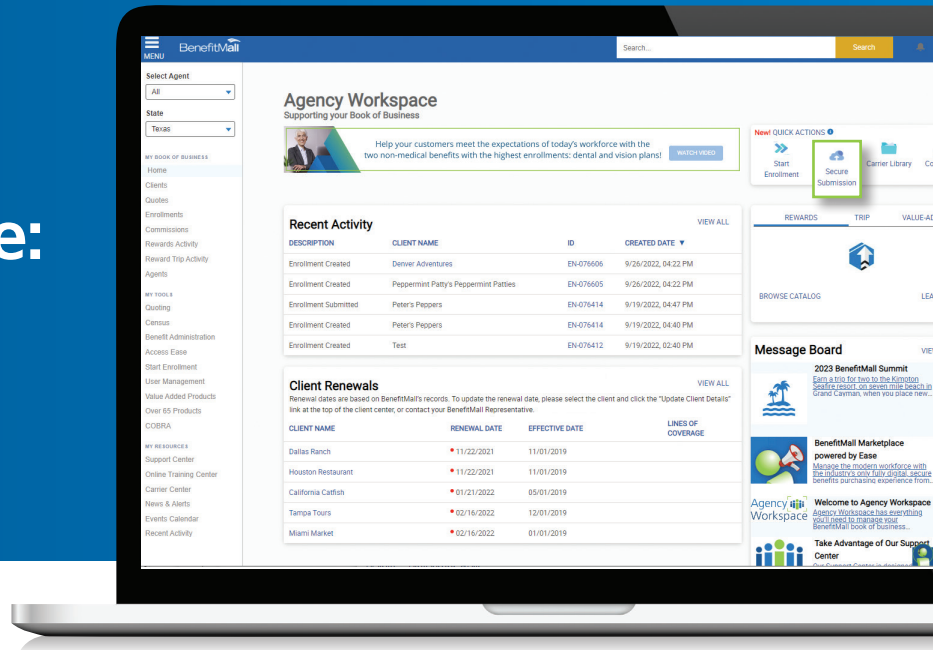


## Simple and Secure: Submit your business through Agency Workspace



BenefitMall's Agency Workspace provides a simple, seamless, and secure location to submit your client's manual enrollments—ensuring transparent service and accurate and timely submissions to carriers. Simply select **Secure Submission** in the Quick Actions toolbar from the Agency Workspace home page to get started.

### STEP 1 ENTER CLIENT INFORMATION

Only three fields are required **A**: Client Name, Enrollment Effective Date, and Zip/Postal Code! Confirm the correct Broker and Submission Contact is selected **B** and click **PROCEED TO UPLOAD FILES** **C**.

This screenshot shows the 'Secure Submission Setup - Peter's Peppers' form. It includes fields for Client Name (Peter's Peppers), Enrollment Effective Date (01/1/2022), and Zip/Postal Code (73101). There are also fields for Broker (Dallas Ranch) and Submission Contact (Dallas Ranch). A 'PROCEED TO UPLOAD FILES' button is visible at the bottom right, marked with a green circle C.

### STEP 2 UPLOAD FILES

Click **UPLOAD FILES** **D** to upload enrollment documents that will be safely and securely submitted to BenefitMall. Next, you can optionally click **ADD A PLAN** **E** to manually add plans if applicable. Click **SUBMIT** **F**.

This screenshot shows the 'Secure Submission Setup' form, specifically the 'Upload Enrollment Documents' section. It features a 'File(s)' field with an 'UPLOAD FILES - OR DROP FILES' button, marked with a green circle D. Below this is a 'Submission Notes (Optional)' field. At the bottom, there is an 'ADD A PLAN' button marked with a green circle E and a 'SUBMIT' button marked with a green circle F.

Have questions? Get the expert support you need to be successful.



DigitalSupport@benefitmall.com



Accessible via support center  
in Agency Workspace



844-iGuy-Help (844-448-9435)

