

# Compliance Bridge User Manual

**COMPLIANCE SIMPLIFIED** 



Brought to you by Medcom Benefit Solutions

## TABLE OF CONTENTS

GETTING STARTED	1
NAVIGATION	2
SHORTCUTS	
I WOULD LIKE TO 4	
DASHBOARD	5
RECENT NOTES	
RECENT NOTIFICATIONS	
EVENTS6	
UPCOMING EVENTS	
SERVICES7	
SERVICE STATUS REPORT	
PENDING PROPOSALS	
ACCOUNTS	9
BROKER ADMIN	
EMPLOYERS	
ADD A NEW EMPLOYER	
COMPLIANCE CHECKLIST	13
RUNNING A COMPLIANCE CHECKLIST 13	
PROPOSALS	14
NAVIGATING CURRENT PROPOSALS14	
ADDING A NEW PROPOSAL	
ORDERS	16
NAVIGATING A CURRENT ORDER	
ADDING A NEW ORDER	
SERVICES	19
NAVIGATING CURRENT SERVICES 19	
DYNAMIC DATA FORM	20

BOOK APPOINTMENT	21
DOCUMENT VAULT	23
NAVIGATING DOCUMENT VAULT	\$
ADDING NEW FOLDERS	ŧ.
UPLOAD NEW FILES	ŧ.
EVENTS	25
DATA SHEETS	25
REPORTS	26
EMPLOYER REPORTS	5
ORDER REPORTS	5
SERVICES REPORTS	7
RESOURCES	28
USER MANUALS	3
BROCHURES	3
VIDEOS	•
MEDCOM WEBSITE	•

## **GETTING STARTED**

If you do not yet have **login credentials**, please complete our <u>Bridge: Broker User Access</u> <u>Request Form</u>.

If you have login credentials, go to the following site: <u>https://portal.medcombenefits.com</u>.

Enter your username and password to access your **Dashboard** or homepage.



If you cannot log in for any reason, please contact us at <a href="mailto:bridge@medcombenefits.com">bridge@medcombenefits.com</a>.

## NAVIGATION

Medcom	Dashboard View information on all your current orders with Medcom.
A Dashboard	Accounts A drop-down menu that takes you to a list of <b>Broker Admin</b> or
卻 Accounts >	Employers.
☑ Compliance Checklist	Compliance Checklist A diagnostic tool for evaluating an employer's compliance status (may
🗅 Proposals	Proposale
다 Orders	Instantly generates <b>Proposals</b> for compliance services and allows users to order proposed service items.
8 Services	Orders
<b>芭</b> Book Appointment	Tracks ordered <b>Services</b> by order number and allows brokers to order new service items.
Document Vault	Services
🛱 Events	Provides real-time tracking, communication, and access to service items in any stage of processing or delivery.
🗎 Data Sheets	Book Appointment
Document Generation	Set up a time to speak with your <b>Account Manager</b> about orders or compliance concerns.
■ Reports >	Document Vault Secure storage space for data and documents.
Resources >	Events
⊠ Contact Us	Provides a monthly calendar showing when services are due. For example, you will see all 5500 services for your clients due at the end of the 7th month following the end of their Plan Year.
ტ Logout	Data Sheets Find templates to fill out to attach to a <b>Service</b> .
	Reports Customized reporting is available in <b>Excel</b> or <b>PDF</b> formats.
	Resources Informative content for using Bridge and demonstrative videos.
	Contact Us
	Provides access to contact our friendly & knowledgeable team for assistance.

#### SHORTCUTS

The Shortcuts can be found at the top of the screen, as shown here on the Dashboard.

Medcom	Θ							Ω ⊕ 💽 i MARIA S ⊕
Dashboard	Agency Test James Agency , ne	w test by anto esthak to	🔠 i would like to 🔹				요 New Employer New Order N	ew Proposal Book Appointment
Accounts >	meet this part execution	n @1				1		
🗹 Compliance Checklist	Recent Notes 52			~	Recent Notificat	ions		<b>0</b> -
C Proposals	🌲 test employer	Form 5500 Filing Prepa	Test Broker Lo.	01/20/2025	Search	۹		<< < 1 > >>
ff Orders	"test				Employer		Subject	Showing I to 10 out of 338 Records Date
8 Services	test employer	Form 5500 Filling Prepa	Rivelines Admin	01/17/2025	anto esthak		Order Confirmation	Apr 08,2024
🗄 Book Appointment	"test				MichaelJames Emplo	oyer Test	Order Confirmation	Feb 28,2024
Document Vault				a ha laase	MichaelJames Emplo	oyer Test	Order Confirmation	Nov 17,2023
F1 Events	a test employer	Fully Insured Renewal	Bluelines Admin	01/16/2025	MichaelJames Emplo	oyer Test	Order Confirmation	Nov 17,2023
	*test				MichaelJames Emple	oyer Test	Order Confirmation	Nov 03,2023
🖹 Data Sheets	🛔 test employer	Form 5500 Filing Prepa	Bluelines Admin	01/16/2025	Michael James Emplo	over Test	Order Confirmation	Nov 03,2023
Document Generation	"test				MichaelJames Emplo	oyer Test	Order Confirmation	Aug 21,2023
Reports >	• Test Complexes			200000	MichaelJames Emplo	oyer Test	Order Confirmation	Aug 21,2023
Resources >	*testing_broker3	Add Wellness Appendi	Karthika Broke.	12/20/2022				

	Ω New Employer
	F New Order
	New Proposal
★	O Book Appointment

This **Shortcut** takes you to the page to enter a **New Employer** so you can generate proposals and order services

This Shortcut takes you directly to a New Order form

This Shortcut takes you directly to a New Proposal form

This **Shortcut** takes you directly to the **Book Appointment** tab, where you can schedule a time to meet with your Account Manager.

## I WOULD LIKE TO ...

Also at the top of the screen is the command, I Would Like To.

	e						🖻 🗘 💿 🤦 i maria s 🕏
Dashboard	Agency Test James Agency , ne	w test by anto esthak to	🕮 I would like to 👻				New Proposal Book Appointment
	meet this part execution						
2 Compliance Checklist	Recent Notes 52		$\smile$	-	Recent Notifications		<b>9</b> -
C Proposals	🛓 test employer	Form 5500 Filing Prepa	Test Broker Lo.	01/20/2025	Search Q		<< < 1 > >>
뗚 Orders	*test				Employer	Subject	Showing I to 10 out of 338 Records Date
8 Services	🌲 test employer	Form 5500 Filing Prepa	Bluelines Admin	01/17/2025	anto esthak	Order Confirmation	Apr 08,2024
🟥 Book Appointment	"test				MichaelJames Employer Test	Order Confirmation	Feb 28,2024
Document Vault				a la latar	MichaelJames Employer Test	Order Confirmation	Nov 17,2023
🗂 Events	a test employer _	Fully Insured Renewal	Bluelines Admin	01/16/2025	Michael James Employer Test	Order Confirmation	Nov 17,2023
	- COOL				Michael James Employer Test	Order Confirmation	Nov 03,2023
E) Data sneets	🛔 test employer	Form 5500 Filing Prepa	Bluelines Admin	01/16/2025	MichaelJames Employer Test	Order Confirmation	Aug 21,2023
Document Generation	*test				Michael James Employer Test	Order Confirmation	Aug 21,2023
🗟 Reports 🛛 🔸	👗 Test Employer _	Add Wellness Appendi	Karthika Broke	12/20/2022	Michael James Employer Test	Order Confirmation	Aug 21,2023
Resources >	"testing_broker3						

When selected, a drop-down menu will appear with

six more shortcuts.

- Check the status of an order
- View an existing proposal
- Convert a proposal to an order
- Go to the document vault
- Create a new proposal
- Create a new order



#### DASHBOARD

The **Dashboard** contains **Recent Notes**, **Recent Notifications**, **Events** and **Upcoming Events**, **Services**, **Service Status Report**, and **Pending Proposals**. It's meant to provide a snapshot of all services ordered from Medcom under your account.

Medcom	⊚									🖾 🗘 💿 🤦 i maria s 👳
Dashboard	Agency Test James Agency	new test by anto es	thak to	1 would like to 👻					<u>ਨ</u> ਜ	0
@ Accounts >	meet this part exec	ution @1							New Employer	New Proposol Book Appointment
🗹 Compliance Checklist	Recent Notes 52						Recent Notific	ations		0 -
C Proposals	🛦 test employer	Form 5500 Filing	Prepa	Test Broker Lo.		01/20/2025	Search	۹		<< < 1 > >>
듀 Orders	"test						Employer		Subject	Showing I to 10 out of 338 Records
ి Services	🛓 test employer	Form 5500 Filing	Prepa	Bluelines Admi	n	01/17/2025	anto esthak	uniouses Toot	Order Confirmation	Apr 08,2024
Book Appointment	*test						Test_Jebastins	ipioyer rest	Order Confirmation	Feb 20,2024
Document Vault	A test amployer	Fully Insured Rep				0/16/2025	Michael James En	nployer Test	Order Confirmation	Nov 17,2023
🛱 Events	*test	Polly Insulad Refi	mu	Bidenine Kom		011012023	MichaelJames En	nployer Test	Order Confirmation	Nov 17,2023
🖹 Data Sheets	# test employer					e la leer	Michael James En	nployer Test	Order Confirmation	Nov 03,2023
Document Generation	*test	Form 5500 Filing	repo	Bluelines Adm		01/10/2020	Michael James En	nployer Test	Order Confirmation	Aug 21,2023
🖩 Reports 🛛 🔿							MichaelJames En	nployer Test	Order Confirmation	Aug 21,2023
Resources >	🛔 Test Employer _	Add Wellness App	endi	Karthika Broke		12/20/2022				
El Contact Us	"testing_brokers									
	Events							Upcoming Even	nts	
O Logout	< > Today		FEBRUA	RY 2025		Month W	eek Day Agenda	Event Name	Employer Name	Date
	-	1101				-				
	26	MON 27	28	29	30 30	31	SAT 1			
		2		5		7				
	4	3	4	5	8	,	0			
	9	10	n	12	13	14	15			
	16	17	18	19	20	21	22			

## RECENT NOTES

MichaelJames	Fully Insured Renewal	Test james Bro_	07/15/2021
*test notes			
MichaelJames	Fully Insured Renewal	Medcom Sales	06/15/2021
*broker Notes 15-06-20	121		
Test Employer	Commuter	Medcom Sales	05/17/2021
*Test Broker			
Test Employer	HRA	Medcom Sales	05/17/2021
*Test Broker Notes			
MichaelJames	Self-Funded COBRA Ra	Medcom Sales	05/10/2021
*Test Broker Notes			

To the left of your screen, you will see a **Recent Notes** section that will show you any communication between you and your **Compliance Account Manager**.

#### RECENT NOTIFICATIONS

To the right of your screen, you will see a **Recent Notifications** section showing you any

system-generated notifications from the Bridge. Common notifications include updates on order status.

Recent Notifications								
Search Q	sho	<< <	1   >     0 out of 340 Records					
Employer	Subject		Date					
Test Company	Order Confirmation		Feb 06,2025					
anto esthak test	Your Proposal #MCPR000002536 Fel							
anto esthak	Order Confirmation	)rder Confirmation						
MichaelJames Employer Test	Order Confirmation		Feb 28,2024					
Test_Jebastins	Order Confirmation		Feb 20,2024					
Michael James Employer Test	Order Confirmation	Nov 17,2023						
Michael James Employer Test	Order Confirmation		Nov 17,2023					
Michael James Employer Test	Order Confirmation	Nov 03,2023						
Michael James Employer Test	Order Confirmation	Nov 03,2023						
Michael James Employer Test	Order Confirmation	Aug 21,2023						

< > Today	Month Wee	ek Day Agenda				
SUN	MON	TUE	WED	THU	FRI	SAT
26	27	28	29	30	31	1
2	3	4	5	6	7	8
9	10	11	12 10pm Updates to the	13	14	15
16	17	18	19	20	21	22
23	24	25	26 12:30am Webinar to F	27 Form 5500 due for Pk	28	1 4:30pm test Event Jek
2 test Event Jeba	3	4	5	6	7 5:56pm te	8 st Jebastin

#### EVENTS

The **Events** section is a monthly calendar that shows when certain services are due. For example, you will see all 5500 services for your clients due at the end of the 7th month following the end of their Plan Year.

## UPCOMING EVENTS

The **Upcoming Events** section shows the **Events** on the calendar in list format.

#### UPCOMING EVENTS

Event Name	Employer Name	Date
Updates to the M		02/12/2025
Webinar to Revie		02/26/2025
Form 5500 due fo	Compliance	02/27/2025
test Event Jeba		03/01/2025
test Jebastin		03/07/2025
test		10/10/2029

#### SERVICES

The **Services** section shows a list of ordered services, including the order status, what action is needed and by whom, along with the projected delivery date. There are also three **Action Icons** that will help you navigate your way through the Bridge platform.

Services										<b>2</b> –
Search		Q Ad	dvanced Search							
Service 🔶	Employer 🛊	Amount 👙	Action Needed	Assigned To	Status	Secondary Status	Order Date 👙	Projected Delivery Date	Delivery Date	Action
1. COBRA Administration	MichaelJames Emp	\$0.00	Please enter data in the	Broker	Ordered	New	11/06/2024	N/A	N/A	
2. Wrap Document & E	MichaelJames Emp	\$650.00	Please enter data in the	Broker	Ordered	New	11/06/2024	N/A	N/A	= • h
3. Wrap Document & E	MichaelJames Emp	\$650.00	Please upload proposal	Broker	Ordered	New	10/06/2024	N/A	N/A	≡ <b>♀</b> ∎
4. Add Document Che	MichaelJames Emp	\$399.00	Please upload proposal	Broker	Ordered	New	10/06/2024	N/A	N/A	≡ <b>♀</b> ∎
5. Wrap Document & E	MichaelJames Emp	\$650.00	Please enter data in the	Broker	Ordered	New	10/06/2024	N/A	N/A	≡ <b>♀</b> ∎
6. Add Document Che	MichaelJames Emp	\$399.00	Please enter data in the	Broker	Ordered	New	10/06/2024	N/A	N/A	≡ <b>♀</b> ∎
7. Wrap Document & E	MichaelJames Emp	\$650.00	Please upload proposal	Broker	Ordered	New	10/06/2024	N/A	N/A	≡ <b>?</b> ∎
8. Wrap Document & E	MichaelJames Emp	\$650.00	Please enter data in the	Broker	Ordered	New	10/06/2024	N/A	N/A	≡ <b>♀</b> ∎
9. Wrap Document & E	MichaelJames Emp	\$650.00	Please enter data in the	Broker	Ordered	New	09/21/2024	N/A	N/A	≡ <b>♀</b> ∎
10. Add Document Che	MichaelJames Emp	\$399.00	Please enter data in the	Broker	Ordered	New	09/18/2024	N/A	N/A	<b>■ 9</b>
Showing 1 to 10 out of 712 Reco	rds								~~	< 1 > >>

#### **ACTION ITEMS**

ICON	WHERE IT TAKES YOU
	This action item brings you to the <b>Data Form</b> . No need to fill out separate datasheets - it's all in the Bridge!
•	This action item brings you to the <b>Service Tracking</b> page to view service status details and enter online service data, if available.
	This action item brings you to the <b>Document Vault</b> for that service. The <b>Document Vault</b> is a repository of all documents for each service.

#### SERVICE STATUS REPORT

You will find the **Service Status Report** section below the **Services** section at the bottom left of your screen. This is where you can see the status of past, present, and future **Orders**.



#### PENDING PROPOSALS

The **Pending Proposals** section shows a list of your proposals generated in the Bridge. You can click on the Proposal ID to download the proposal. There are also six **Action Icons** (accessible by clicking the settings icon in the Action column) that will help you navigate your way through the Bridge.

Pending Proposals	- Convert to Order to G	et Started T	oday!		<b>C</b> –
Search	Q				Ili>Image: Showing I to 10 out of 574 Records
Proposal ID	Employer 👙	Amount 🜲	Created by	Created Date 🛔	Action
1.MCPR000002522	MichaelJames Emp	\$650.00	Medcom Sales(B	09/10/2024	
2.MCPRO00002512	employer ftp error1	\$650.00	@ •	024	@ •
3.MCPR000002491	Employer issue 8	\$399.00	😭 Convert to Order	)24	<u>ه</u> -
4.MCPRO00002479	MichaelJames Emp	\$650.00	View Proposal	23	- -
5.MCPR000002424	MichaelJames Emp	\$650.00	🕹 Download Propos	al 123	\$\$ <b>~</b>
6.MCPR000002417	MichaelJames Emp	\$0.0	Send Proposal 🗹	123	\$\$ <b>-</b>
7.MCPRO00002416	MichaelJames Emp	\$0.00	街 Duplicate Propos	al <sub>123</sub>	↔ ▼
8.MCPR000002415	MichaelJames Emp	\$399.00	🖻 Delete Proposal	23	چ ح
9.MCPR000002414	MichaelJames Emp	\$0.00	Medcom Sales(B.,	02/17/2023	<u>ن</u> ه •
10.MCPR000002413	MichaelJames Emp	\$0.00	Medcom Sales(B	02/16/2023	@ <b>-</b>

#### **ACTION ITEMS**



## ACCOUNTS

Accounts BROKER ADMIN Broker Admin The Broker Admin page is where you can View and Edit current Broker Admins in your Agency and create a report in Employers PDF or Excel of your broker admins (shown below).

S BROKER ADMIN LIST			PDF Excel
Search	Q 8		20 🗸
Broker Admin Name 🛊	Agency Name \$	Status	Action
1. Maria s	Test James Agency, new test by anto esthak to meet this part execution (@)	Active	• /
Showing 1 to 1 out of 1 Records		<b>« «</b> 1	> >>

Showing 1 to 1 out of 1 Records

On the Broker Admin page under the Broker Admin List, you will see action items with clickable icons: View and Edit.

#### **ACTION ITEMS**



#### **EMPLOYERS**

# Medcom Bridge / Employers List	留 1 would like to ~	Q, New Employer	w Order New Proposal Book Appointment
• EMPLOYERS LIST			PDF Excel
Search	۹ ۵		20 ~
Employer Name 👙	Broker Admin Name 👙	Employer Status	Action
1. Agency Assign Issue by James	Karthika Broker Admin	Active	@ •
2. Agency Test@0	Assign Test@22	Active	@ <b>*</b>
3 . anto estahk test	Maria s	Active	@ <b>-</b>
4 . anto esthak	Maria s	Active	@ <b>*</b>

#### ADD A NEW EMPLOYER

- 1. Once you are on the Employers page, click the **New** button in the top right corner.
- 2. This will open the Employer Detail screen.
- 3. Fill out the New Employers information shown here.
- 4. Please complete the required fields (notated with a red box) within the following tabs when adding a New Employer.
  - a. Employer Information
  - b. Related Employers
  - c. Benefits
  - d. Billing Information
- 5. Click **Next** at the top right of your screen as you move through each section.

#### Medcom Bridge

nplionce Employer Name *  Address  City  Employer Tax ID  Phone Number  Employer Contact Person *  Total # of Employees  Employer Status  Active  Detail  imployers List / Edit  Transion  Is the employer a M  No	StoreSelect Ext	CDHP  Address 2  Total # of Full Time Employees  Payment Method In house  Would like to	Ext Ext	
Employer Name * Address City Employer Tax ID Phone Number Employer Contact Person * Total # of Employees Employer Status Active Notes  Detail Employers List / Edit  Transion Is the employer a M No	StateSelect Ext	Address 2	Ext	
Address City Employer Tax ID Phone Number Employer Contact Person * Total # of Employees Employer Status Active Notes	State Ext	Address 2	Ext	
Address City City Employer Tax ID Phone Number Employer Contact Person * Total # of Employees Employer Status Active Notes Compliance Transion Is the employer a M No	StateSelect Ext	Address 2	Ext	
City  Employer Tax ID  Phone Number  Employer Contact Person  Employer Status  Active  Notes	Stote  Stote  Stote  Ext  K  K  K  K  K  K  K  K  K  K  K  K  K		Ext Ext	
City  Employer Tax ID  Phone Number  Employer Contact Person  Total # of Employees  Employer Status  Active   Detail  Employers List / Edit   Transion  Is the employer a M  No	StateSelect Ext	Zip Code Tip	Ext	
Employer Tax ID Phone Number Employer Contact Person * Total # of Employees Employer Status Active Notes	Ext	Secondary Phone Number Contact Email * Contact Email * Total # of Full Time Employees Payment Method In house Would like to	Ext Ext CDHP	
Employer Tax ID  Phone Number  Employer Contact Person *  Total # of Employees  Employer Status  Active  Notes	Ext	Secondary Phone Number	CDHP	
Phone Number  Employer Contact Person *  Total # of Employees  Employer Status Active  Notes   Detail  Employers List / Edit   Transion Is the employer a M No	Ext	Secondary Phone Number	Ext	
Employer Contact Person * Total # of Employees Employer Status Active Notes  Detail Employers List / Edit  rmation Is the employer a M No	tember of a Controll	Contact Email * Contact # Contac	CDHP	
Employer Contact Person *  Total # of Employees  Employer Status Active Notes	tember of a Controll	Contact Email *	CDHP	
Total # of Employees Employer Status Active Notes  Detail Employers List / Edit  Compliance  rmation Is the employer a M No	tember of a Controll	Total # of Full Time Employees Payment Method In house Would like to	CDHP	
total # of Employees  Employer Status Active Notes  Detail  Employers List / Edit  Compliance  rmation Is the employer a M No	4ember of a Controll	Total # of Full Time Employees Payment Method In house Would like to	CDHP	
Employer Status Active Notes Detail Employers List / Edit Compliance rmation Is the employer a M No	fember of a Control	Payment Method In house	CDHP	
Active Active Notes Detail Employers List / Edit Compliance rmation Is the employer a M No	+ tember of a Controll	Payment Method In house Would like to	CDHP	
Notes  Detail  Employers List / Edit  Compliance  rmation Is the employer a M No	1ember of a Controll	would like to	CDHP	
Detail imployers List / Edit Compliance rmation Is the employer a M No	1ember of a Controll	would like to -	СДНР	
Detail Employers List / Edit Compliance rmation Is the employer a M No	tember of a Controll	ed Group or a Group of Affiliate	СДНР	
Detail Employers List / Edit Compliance rmation Is the employer a M No	fember of a Controll	would like to -	CDHP	
ion r Detail	8	I would like to 👻		
Employers List / Edit			CDHP	
ormation			ODIF	
"Please add inforr	mation about the e	mployer's benefit program in t	ne spaces below."	
loyers List Any Excluded	Classes (Temporar	y, Seasonal, Part Time, etc.)		
Benefits are offere	ed to:		Are benefits offered to Dom	estic Partners
ition Select		*	Select	¥
Add Class		~	Select	Ŷ
Add Class O Would you like to	add another Plan T	vpe?	Select	~
Add Class • Would you like to	add another Plan T	vype?	Select	•
Add Class O Would you like to No	add another Plan T	vpe?	Select	~
ormat	Compliance tion SUIST Any Excluded Benefits are offer	Compliance tion "Please add information about the ei List Any Excluded Classes (Temporar Benefits are offered to:	Compliance tion "Please add information about the employer's benefit program in th List Any Excluded Classes (Temporary, Seasonal, Part Time, etc.) Benefits are offered to:	Compliance       CDHP         tion       "Please add information about the employer's benefit program in the spaces below."         List Any Excluded Classes (Temporary, Seasonal, Part Time, etc.)

Employer Detail     Medcom Bridge / Employers	Edit	d like to 👻		
	Compliance		CDHP	
오 Employer Information	Do not bill employer.Broker will pay for all a	compliance services p	provided on behalf this employer. ' tab.	
<b>≗</b> + Benefits	Primary Billing Name *		Secondary Billing Name	
Billing Information	Billing Address		Billing Address 2	
	Billing City	Billing State	Billing Zip Code	
	Office Phone	Ext	Billing Contact Email *	
			Back	Next

6. Once all the information is entered, click **Finish**, and it will take you back to the Employers List, where you can view and edit your Employers.



Note that you can add an Employer when creating a New Proposal or Order without ever leaving the New Proposal or New Order Process.

## **COMPLIANCE CHECKLIST**

**The Compliance Checklist** page is where you can answer a brief questionnaire to assess an employer's compliance, and Medcom will provide friendly feedback on your next steps.

Compliance Checklis     Medcom Bridge / Compliance Chec	t klist	⊞ I would like to ▼		<u></u> New Emple	er New Order	New Proposal	E Book Appointment
Select Employer *	Select Employer		v				

#### RUNNING A COMPLIANCE CHECKLIST

- 1. Go to the **Select Employer** dropdown menu to find the **Employer** for whom you would like to run a Checklist.
- 2. Once you have found your **Employer**, select the Short or Long Version of the checklist. Then, you'll be prompted to answer questions to the best of your knowledge.
- 3. When you have completed the questionnaire, click **Save and Continue** to save your responses or click **Save & Generate Report** to create the checklist, or you can click **Reset** at the top of the screen to start over.

Compliance Medcom Bridge / Comp	Checklist	BB I would li	ke to 🝷			<u></u> New Employer	न्न New Order	New Proposal	Č Book Appointment
Select Employer *	anto estahk test		v	Compliance Checklist (Lo	ng Versio 🗸 🗸 🗸 Reset	D Previous Score			
ACA COMPLIANCE	COBRA COMPLIANCE	HIPAA COMPLIANCE	WELLNESS COMPLIANCE	COMPLIANCE BASICS	GOOD FAITH EVALUATION				
								ANSWER KEY ?	VE AND CONTINUE
is the employer an Al	PPLICABLE LARGE EMPLOYER (ALI	E)?						$\pi$	
Yes No	Not Sure								
Notes:									2000/2000
									1.
Has the employer est	ablished an ACA-compliant po	olicy for determining HEALT	H PLAN ELIGIBILITY and conduc	ted Full Time Employee deterr	mination per applicable regulato	ry guidelines?			
Yes No	Not Sure     Not A	pplicable							
Notes:									2000/2000
Does the group healt	h plan meet MINIMUM VALUE?								
Yes No	Not Sure     Not A	pplicable							
Notes:									2000/2000
is the group health pl	an AFFORDABLE for all Full Time	e Employees?							
Yes No	Not Sure     Not A	pplicable							
Notes:									2000/2000

4. If you select **Save & Generate Report**, your completed checklist will populate on the screen.

Diagnostic Compliance Checklist

EXECUTIVE	SUM	MARY			CON	IPLIANC	E SCORE
Employer Name: Date of Review: Agency:	Test Co 09/09/ Test Jan	mpany 2021 mes Agency			3	%	
UMMARY OF CHE	CKLIST	RESULTS		-			
	Catego	ory	G	Y	( <b>R</b> )	N/A	Score
Compliance Ba	sics	Questions 1 - 13	0	13	0	0	0 %
ACA Compliar	nce	Questions 14 - 20	0	6	1	0	0 %
COBRA Complia	ance	Questions 21 - 23	0	3	0	0	0 %
HIPAA Complia	ance	Questions 24 - 29	0	6	0	0	0 %
Wellness Compl	iance	Question 30	0	1	0	0	0 %
Good Faith Evalu	uation	Question 31	0	1	0	0	0 %
Test		Question 32	1	0	0	0	100 %
	Tota	1	1	30	1	0	3.12 %

You will see the scoring color-coded by levels of importance.

This is what your Diagnostic Compliance Checklist will look like once you've run the report.

## PROPOSALS

The **Proposals** page is where you can view current **Proposals**, create **New Proposals**, convert **Proposals** to **Orders**, duplicate **Proposals**, and create PDF or Excel versions of your Proposals list.

Note: If your client or employer is paying for the Order, then you must have a Proposal before converting it to an Order.

#### NAVIGATING CURRENT PROPOSALS

1. Select either the Agency, Broker, or Employer from the drop-down list and choose the Employer you are searching for.

Proposals # Medcom Bridge / Proposals List	₩ I would like to 👻			Rew Employer	New Proposal Book Ap	ی opointment
PROPOSALS LIST					PDF DE Excel	🖺 New
Select Employer	* Search	Q 2				20 🗸
Proposal ID	Employer 🛊	Amount 🛊	Created by	Created Date 👙	Action	
1.MCPR000002522	MichaelJames Employer Test	\$650.00	Medcom Sales(BETA)	09/10/2024	令 -	
2.MCPR000002512	employer ftp error1	\$650.00	Maria s	04/09/2024	÷ ئ	
3.MCPR000002491	Employer issue 8	\$399.00	Maria s	02/03/2024	÷ ئ	
4.MCPR000002479	MichaelJames Employer Test	\$650.00	Medcom Sales(BETA)	11/09/2023	<del>،</del> ھ	
5.MCPR000002424	MichaelJames Employer Test	\$650.00	Medcom Sales(BETA)	08/10/2023	• @	
6.MCPRO00002417	MichaelJames Employer Test	\$0.00	Medcom Sales(BETA)	03/16/2023	@ <b>*</b>	

- 2. Your Employer will then show in the list of Proposals. If there is a current Proposal available, then you can view that Employer's Proposal from there by clicking on the Proposal ID.
- 3. If you are ready to proceed, you can then Convert to Order from the drop-down menu in the Action column.

#### ADDING A NEW PROPOSAL

- 1. On the **Proposals** page, click the 'New' button in the top right corner.
- 2. A **New Proposal** screen will pop up. Now, select the **Employer** you want to create the New Proposal for.
- If you enter an Employer name that does not exist, you will be prompted to create a New Employer. Click the 'New Employer' link and follow the prompts.
- 4. Select the **Service** from the drop-down list, you can add multiple **Services** to the same **Proposal** if needed. Customized pricing for your company will automatically generate.

S New Proposal ■	I would like to $\star$						Rew Order		Č Book Appointme
Medcom Bridge / Proposal List / New Proposal									
Select Employer *									
Test Company									Ŧ
EMPLOYER		BROKERAGE FIRM				BROKER ADMIN			
Test Company 9 <u>Bibb@bb.com</u> <b>v</b> N/A		Test James Agency , new test by anto es 9 kochi, kochi, California - 11111 N/A (111) 111-1111	hak to me	et this part execution @1		Maria s 9 kochi, , kochi, Alabama - ■ <u>salih shait3@gmail.com</u> € (111) 111-1111	11111 I		
Service Info					Price	Quantity	Total	Act	lon
Select Service					\$0.00	1	\$0	×	t
			Q						
Select Service Most popular Wrap Document & ERISA SPD	Add Document C	heck Up to Wrap Plan Preparation	Î					→ Pro	ceed O Add
Compliance Packages ERISA Supreme Plus Package - First Year	ERISA Supreme P	lus Plus Package Renewal							
ERISA Supreme Plus Package (Less than 100 Employees) - First year	ERISA Supreme P Employees)	lus Plus Package Renewal (Less than 100	- 1						
Wrap Document ADD-ONS (Wrap Document must be purchased on	n same order)		÷						

- Once you are done adding services, click 'Proceed'. If you do not need to go back and edit your proposal, you can choose whether you or the Employer will be paying for the Service. From the Payment By drop-down list, you can select Broker Pay, Employer Pay, or Split Pay.
- 6. If you'd like to add your logo to the **Proposal**, click the **'Upload Broker Logo' button** in the top right of your screen. Once it's added, your logo will appear on all future proposals.

Proposal Summary						Upload Broker Logo
EMPLOYER	BROKERAGE FIRM			BROKER ADMIN		
anto esthak test! 9 <u>anto@gmail.com</u> ~N/A	Test James Agency , new test by ♀ kochi, kochi, California - 11111 ■ N/A ᢏ (111) 111-1111	anto esthak to i	meet this part execution @	DI Maria s ♀ kochi, , kochi, Alab ॾ <u>salih shait3@gmv</u> ᢏ (111) 111-1111	ama - 11111 a <mark>iil.com</mark>	
S.No Service	Price	Qty	Payment By	Employer Pay	Broker Pay	Sub Total
1 Wrap Document & ERISA SPD 🛓	\$ 650.00	1	Select 🗸	0.00	0.00	\$650.00
		(	Select Broker Pay	)		

#### **ACTION ITEMS**

On the **Proposals** page, under the **Proposals List**, you will see an **Action** drop-down menu with the following options: **Convert to Order**, **View Proposal**, **Download Proposal**, **Send Proposal**, and **Duplicate Proposal**. Refer to Page 9 for where each Action Item takes you.

PROPOSALS LIST					PDF Excel New
Select Employer	• Search	Q 2			20 🗸
Proposal ID	Employer 🖕	Amount 🖕	Created by	Created Date 👙	$\frown$
1.MCPR000002536	anto esthak test	\$650.00	Maria s	02/05/2025	@ •
2.MCPRO00002522	MichaelJames Employer Test	\$650.00	Medcom Sales(BETA)	09/10/2024	E Convert to Order
3.MCPRO00002512	employer ftp error	\$650.00	Maria s	04/09/2024	View Proposal
4.MCPR000002491	Employer issue 8	\$399.00	Maria s	02/03/2024	<ul> <li>Download Proposal</li> <li>Send Proposal</li> </ul>
5.MCPR000002479	MichaelJames Employer Test	\$650.00	Medcom Sales(BETA)	11/09/2023	쉽 Duplicate Proposal
6.MCPR000002424	MichaelJames Employer Test	\$650.00	Medcom Sales(BETA)	08/10/2023	<u>ه</u> -

#### ORDERS

The **Orders** page is where you can view current orders, create new orders, view your ordered services, view the employer's invoice for a selected order, and create a PDF or Excel version of a list of your Orders.

Orders # Medcom Bridge / Orders	🗄 I would like to 🔻		<u>)</u> New Employer	F New Order	New Proposal	O Book Appointment
• ORDERS LIST					D PDF	Excel TR New
Select Employer	Search Q					20 ~
Order ID	Employer 🛊	Amount 🛊	Order date 🛔		Action	
1.#MCOD00022089	test employer assign	\$ 495.00	01/16/2025		• •	
2.#MCOD00022088	test employer assign	\$ 495.00	01/16/2025		• •	
3.#MCOD00022084	test employer assign	\$ 1745.00	01/15/2025		• •	
4.#MCOD00022083	test employer assign	\$ 495.00	01/13/2025		• •	
5.#MCOD00022082	test employer assign	\$ 495.00	01/13/2025		• •	
6.#MCOD00022074	vinna	\$ 300.00	01/08/2025		• • •	

#### NAVIGATING A CURRENT ORDER

- 1. Type the **Employer** you're searching for in the search bar.
- 2. Your Employer will then show in the list below of **Orders**. If there is a current order available, then you can view that Employer's Order from there.
- 3. You can also click the **PDF** or **Excel** buttons in the top right to generate a report of all your Orders.

#### ADDING A NEW ORDER

1. Once you are on the **Orders** page, Click the **'New'** button in the top right corner.

Orders # Medcom Bridge / Orders	🗄 I would like to 👻		요. New Employer New Ord	der New Proposal Book Appointment
• ORDERS LIST				PDF Excel
Select Employer	Search Q			20 ~
Order ID	Employer 🛊	Amount 🛔	Order date 🛔	Action
1.#MCOD00022089	test employer assign	\$ 495.00	01/16/2025	• U II
2.#MCOD00022088	test employer assign	\$ 495.00	01/16/2025	• •
3.#MCOD00022084	test employer assign	\$ 1745.00	01/15/2025	• •
4.#MCOD00022083	test employer assign	\$ 495.00	01/13/2025	• •
5.#MCOD00022082	test employer assign	\$ 495.00	01/13/2025	• •
6.#MCOD00022074	vinna	\$ 300.00	01/08/2025	• • •

- You will be directed to the 'New Order' screen, where you can select the Employer you'd like to create a New Order for.
- If you enter an Employer name that does not exist, you will be prompted to create a New Employer. Click on the Create Employer link and follow the prompts.
- 4. Once an **Employer** is selected, select the **Service** you are ordering from the drop-down list. If needed, you can add multiple services to one Order.

► New Order	I would like to 👻		<u>)</u> New Employer	F New Order	New Proposal	ل Book Appointment
Meacom Bridge / Orders List / New Order						
Select Employer *						
Test Company						
EMPLOYER	BROKERAGE FIRM		BROKER ADM	IIN		
Test Company	Test James Agency , new test by anto esthak to meet this part exe	cution	Maria s			
	©1 9 kochi kochi California - 1111		kochi, kochi salih shait3	, Alabama - 11111 Damail.com		
€ N/A			🔍 (111) 111-1111			
	C (m) m-m					
Service Into		Price	Quantity		Total	Action
Select Service		\$0.00	1		\$0.00	×
	•					
Select Service	·					
Most popular						Order Order
Wrap Document & ERISA SPD	Add Document Check Up to Wrap Plan Preparation					
CDHP Administration						
FSA Administration	FSA/Commuter Administration					
HRA Administration	FSA/HRA Administration					
HSA Administration	Test Special Service					
COBRA						

5. Customized pricing for your company will automatically generate, and you can then click 'Order.' If you do not need to go back and edit your proposal, you can now choose if you or the Employer will be paying for the Service. From the Payment By drop-down list, you can select Broker Pay, Employer Pay, or Split Pay.

- 6. Once you have selected the payment option, you may click '**Checkout**' to finish the process, and you will be taken back to that Employer's Order page.
- 7. If a **dynamic data form** is available for any of the ordered services, you will be prompted to enter the necessary data.

#### **ACTION ITEMS**

On the **Orders** page, under the **Orders List**, you will see an **Action** menu with clickable icons: **View Order Details**, **Ordered Services**, and **Invoice**.

Orders # Medcom Bridge / Orders	B I would like to 👻		<u></u> New Employer	F New Order	New Proposal	Č Book Appointment
• ORDERS LIST					PDF	Excel 🗮 New
Select Employer	Search Q 2				$\frown$	20 ~
Order ID	Employer 🛊	Amount 👙	Order date 🛔		Action	
1.#MCOD00022115	Test Company	\$ 650.00	02/06/2025		• • •	
2.#MCOD00022089	test employer assign	\$ 495.00	01/16/2025		• • =	
3.#MCOD00022088	test employer assign	\$ 495.00	01/16/2025		• • •	
4.#MCOD00022084	test employer assign	\$ 1745.00	01/15/2025		• •	
5.#MCOD00022083	test employer assign	\$ 495.00	01/13/2025		• •	
6.#MCOD00022082	test employer assign	\$ 495.00	01/13/2025		• • =	

ICON

#### WHERE IT TAKES YOU

View Order Deta



3

View Order Details pulls up the Order Details along with the Employer Info, Agency Info, and Broker Info.

Ordered Services brings you to the Services page for the selected Employer.

Invoice takes you to the Invoice page, where you can see any invoices.

#### SERVICES

The **Services** page is where you can **view a list** of all your services. You can also **edit**, create **PDF** and **Excel Ordered Services Lists**, **Track**, enter **Online Data**, and store your **Service Documents** in the **Document Vault**.

SERVICE LIS	т								🖄 PD	F 🛛 Excel
Select Employer			Search		Q D	Advanced Search				20 ~
Service 🛊	Employer 🝦	Amount 🝦	Action Needed	Assigned To	Status	Secondary Status	Order date 🛔	Projected Delivery Date	Delivery Date	Action
1. Wrap Document	Test Company	\$650.00	Please enter data	Broker	Ordered	New	02/06/2025	N/A	N/A	III 9 🖿
2. Form 5500 Filin	test employer assi	\$495.00	Action Required	Broker	Data Needed	Data Needed-Schedules	01/16/2025	N/A	N/A	E 9 E
3. Form 5500 Filin	test employer assi	\$495.00	Action Required	Broker	Data Needed	Data Needed-Schedules	01/16/2025	N/A	N/A	🗏 9 🖿
4. Form 5500 Filin	test employer assi	\$495.00	Action Required	Broker	Data Needed	Data Needed-Schedules	01/15/2025	N/A	N/A	≡ <b>?</b> ∎

## NAVIGATING CURRENT SERVICES

- 1. Select the employer you would like to view from the **Select Employer** drop-down list or from the **Search** bar.
- 2. To create a list of your **Services**, click the **PDF** or **Excel** buttons and view/print your report from there.

#### **ACTION ITEMS**

On the **Services** page, under the **Service List**, you will see an **Action** menu with clickable icons: **Dynamic Data Form**, **Track** and **Document Vault**.

ICON	WHERE IT TAKES YOU
	This <b>Dynamic Data Form</b> icon brings you to the data form. No need to fill out separate datasheets - it's all in the Bridge!
•	The <b>Track</b> icon takes you to the <b>Order Details</b> screen, where you can view details and track the status of the service(s). You can also enter online data for services that allow you to enter important data in an online data form.
	The <b>Document Vault</b> icon takes you to the <b>Document Vault</b> screen where you can upload and download important documents.

## DYNAMIC DATA FORM

Many of the services you can order include a **Dynamic Data Form** so you can easily enter the information that we need to create the compliance documents that were ordered. When you first complete an Order, if a **Dynamic Data Form** is available, you will be prompted to enter data at that time.

If you want to enter the data later, go to the Services page under the Service List and click on the Track icon under the Action menu corresponding with the Service. Then, go to the **Dynamic Data Form** tab.

Service Medcom Bridge / Service	e List	器 I would like to 🔻	New Employer	Rew Order	New Proposal	Č Book Appointment
WRAP DOCUM	/ENT & ERISA SPD 🔹				Ω	ORDER DETAILS +
<b>♀</b> Track	<pre>c Details</pre>	Document Vault	💱 Notification Settings		📃 Dynamic 🛙	Data Form
						C Refresh
# Form Nam	ne	Status	Submitted Da	le	Act	ion
1 Wrap Doci	ument & ERISA SPD	Pending	N/A			K

Click the **Online Service Form** icon. Once in the **Dynamic Data Form**, enter the requested information. If you would like to save your information and come back and finish it later, click on the **'Save and Exit'** button.

When you have completed the data entry, click on the **'Submit'** button.

t	1 mm/dd/yyyy		-
m/dd/yyyy			L
'ear to be filed:	Total Number of Active Enrolled Employees at the	End of the Plan Year to be filed:	
nd of the Plan Year to be filed:	Number of Other Retired or Separated Participants	s Entitled to Future Benefits:	
Plan Administrator Contact Name	Plan Administrator Job Title	Plan Administrator Phone	
		x000(-300(-300()	
Plan Signer Name	Plan Signer Job Title	Plan Signer Phone	
		χασας-χασχ	
Is there a Second Plan Signer?	Form 5500 Special Instructions & Notes		
	~		
	ear to be filed: Ind of the Plan Year to be filed: Plan Administrator Contact Name Plan Signer Name Is there a Second Plan Signer?	ear to be filled:	ear to be filled:  Total Number of Active Enrolled Employees at the End of the Plan Year to be filled:  Ind of the Plan Year to be filled:  Plan Administrator Other Retired or Separated Participants Entitled to Future Benefits:  Plan Administrator Contact Name Plan Administrator Job Title Plan Administrator Job Title Plan Signer Name Plan Signer Job Title Plan Signer Plan Sig

If you have Form 5500 filing services with Medcom, simply select the service from the Service List, then click on the **5500** tab. From this screen, you can easily upload your schedules or submit requests for new ones.

Service Medcom Bridge / Service List	88	I would like to 👻						r New Order	New Proposal	Ö Book Appointment
FORM 5500 FILING	G PREPARATION (INCLUDES SAR)								9	ORDER DETAILS +
V Tr	ack Details	Docur	nent Vault			5	500	<b>(</b> )	Notification Setti	ngs
Main Status :	Data Needed			Seco	ndary Status :		Data Needed-Schedules			
Schedules		Status			Documents		Request Schedule from	n Carrier		Action
Medical		♥ Rec	ived	~	Schedules_1_16_		<b>∢</b> Request			×
Medical		▼ Nee	ded	~	1 Upload		A Request			×
	Participant Counts		Plan Signer				AckiD			
• Add schedules	Needed	~	Needed			~	123			11
										Update
			Status Histor	ry of schedul	es requested					
				No Data Foun	d					

#### **BOOK APPOINTMENT**

1. When you select **Book Appointment** on the navigation bar, it will take you to the **Appointment** page. From there, you can select your **Account Manager** from the drop-down menu.

2. When you select your Account Manager, you'll be prompted to select the desired duration of your Appointment.

PLEASE SELECT FROM TIMES SELECT TO BOOK		
	Candace Jones	
	Welcome to my scheduling page. Please follow the instructions to add an event to my celemder.	
	😑 15 Minute Meeting 🕨 🔵 30 Minute Meeting 🕨	
	60 Minute Meeting	
If your Account Manager is busy during the time Candace Jones	you requested then you may reserve time with another Medcom Account Manager by selecting a name from the dropdown below.	

- 3. Once you've selected the length of your Appointment (15, 30, or 60 minutes), The Bridge will then show your Account Manager's availability for that length of appointment.
- 4. Select the available Date & Time that works for you and click 'Confirm.'

								10
÷	Sele	ct a D	ate &	Time				19.
Candace Jones	Septe	ember 2	021			<	>	Wednesday, September 22
30 Minute Meeting	SUN	MON	TUE	WED	THU	FRI	SAT	
30 min				1	2	3	4	1:30pm
	5	6	7	8	9	10	11	1:45pm
	12	13	14	15	16	17	18	2:00pm Confirm
	19	20	21	22	23	24	25	2:15pm
	26	27	28	29	30			2:30pm
	0	Eestern T	ime - US	& Cened	e (4:27pr	π) •		2:45pm

5. Enter your First Name, Last Name, and Email under Enter Details. Select Schedule Event, and your appointment will be scheduled with your Account Manager.

	Candace Jones 30 Minute Meeting 30 min 200pm - 2:30pm, Wednesday, Saptember 22, 2021 \$ Eastern Time - US & Canada	Enter Details First Name * Mallory Exail * Endle Grinedcombe Add Gweth Uthat's the subject mult	List Name * Hopkins inelfa.com er of the discussion?* cout the Dynamic Data Form	
--	---	---	--	--

6. The meeting will populate on their calendar.

## DOCUMENT VAULT

The **Document Vault** page is where you can manage your documents. You can view **Files**, **Folders**, and **Download** all the secure files from each of your employers.

cument Vault Bridge / Document Vault	🔠 I would like to 📼			F New Order	New Proposal
les Folders Filter by name		٩			
	Modified	Action			
ency Assign Issue by James	05/16/2024 11:36:57 AM	i			
ency Test0	12/10/2024 3:24:37 PM	i			
nployer Test 98	05/16/2024 8:09:20 AM	i			
2.2		(27)			

#### NAVIGATING DOCUMENT VAULT

- 1. Search for Employer by either clicking **'Files'**, **'Folders'**, or **'Filter by name...'** in the search bar.
- Click on the employer's File you want to view, and it will take you to that employer's Document Vault page.

3. Once you are in the selected employer's **Document Vault** page you can view each file stored within that employer.

Document Vault     Medcom Bridge / Document Vault	🔛 I would like to 👻		Sew Employer         FF         Image: Constraint of the second se
All Files Folders Filter by name		Q 🗈 New Folder 🇅 Upload	III Grid III Ust
root / Agency Test0			
Name	Modified	Action	
D back			
5500-FILING_2024	12/10/2024 3:24:37 PM	i 🕹 / 🐵	
Signed Proposals	06/10/2024 1:31:14 PM	i 🔺	

#### ADDING NEW FOLDERS

- 1. Search for employer by clicking 'Files', 'Folders', or 'Filter by Name' in the search bar.
- 2. Click on the employer's File you want to view, and it will take you to that employer's **Document Vault** page.
- Once you are in the selected employer's **Document Vault** page you can click 'New Folder' and it will prompt you to make a 'New Folder Creation'.
- 4. When you are finished, click 'OK', and it will take you back to that employer's Document Vault.

Document Vault     Medcom Bridge / Document Vault	88 I would like to *	Q New Employer	F New Order	New Proposal	ی Book Appointment
All Files Folders Filter by name	Q 🖻 New Fold	± Upload			🖽 Grid 🗮 List
<ul> <li>root / Test Company</li> <li>Name</li> <li>back</li> <li>wash 2025</li> </ul>	New Folder Creation	_	_	-	
- WRAP_2023	Cancel OK				

#### UPLOAD NEW FILES

- 1. Search for employer by either clicking 'Files', 'Folders', or 'Filter by Name...' in the search bar.
- 2. Click on the employer's **File** you are wanting to view, and it will take you to that employer's **Document Vault** page.

- Once you are in the selected employer's **Document Vault** page you can click '**Upload**' and it will prompt you to choose a file to upload.
- When you are finished uploading that file it will take you back to that employer's Document Vault.

#### **ACTION ITEMS**

On the **Document Vault** page, you will see an **Action** menu with clickable icons: **Info**, **Download**, **Rename**, and **Delete**.

Document Vault     Medcom Bridge / Document Vault	BB I would like to 👻		New Employer	ew Order New Proposal	C Book Appointment
All Files Folders Filter by name		Q 🗈 New Folder 土 Upload			III Grid 🗮 List
root / Agency Test0					
Name	Modified	Action			
O back					
5500-FILING_2024	12/10/2024 3:24:37 PM	i 🔺 / 🗄			
Signed Proposals	06/10/2024 1:31:14 PM				



The **Events** tab provides a monthly calendar showing when services are due. For example, you will see all 5500 services for your clients due at the end of the 7th month following the end of their Plan Year.

## DATA SHEETS

The **Data Sheets** tab gives you access to all the downloadable data sheets that Medcom offers for different **Services**.

You can download a **Data Sheet** to fill out an **Order**, by clicking on the **Download** icon on the right side of the **Data Sheets Index**.

#### REPORTS

#### EMPLOYER REPORTS

- 1. Select desired **State** you'd like to run an **Employer Report** on from the drop-down menu.
- 2. Once selected, click 'Filter' for the results.

mployer Report ledcom Bridge / Reports / Employ	ver Report	B I would like to	器 I would like to *			<u>)</u> nployer	F New Or	der N	lew Pro	posal	ن Book Appointme
CUSTOM FILTER											-
State		Filter									
Select All											
Search:			Columns (8 of 40)	🖹 Сору	Excel	csv 🖪	PDF Portrait	🖹 PDF Lan	dscape	🖨 Print	Show 100 rows
Showing 1 to 59 of 59 entries										Previo	ous 1 Next
Employer Name 🔹	Broker Admin 🛛 🌲	Agency		ŧ	Address		City 🍦	State	¢	Zip	User Status
Agency Assign Issue by James	Karthika Broker Admin	Karthika RRR									Active
Agency Test@0	Assign Test@22	Test Assign Agency@44			46/48 Middle East	ko	ovilpatti	Georgia		33445	Active
anto estahk test	Maria s	Test James Agency , new meet this part execution	w test by anto estha @1	k to							Active
anto esthak	Maria s	Test James Agency , new meet this part execution	v test by anto estha @1	k to							Active

3. You now have the option to select one of the following formats to save your results: **Copy**, **Excel**, **CSV**, **PDF Portrait**, **PDF Landscape**, and **Print**.

#### ORDER REPORTS

The **Order Report** page is where you have access to all your **Order Details** and you can select one of the following formats to save your results: **Copy**, **Excel**, **CSV**, **PDF Portrait**, **PDF Landscape**, and **Print**.

- 1. Select the **Order Date Range** for the orders you wish to see. You can also filter by an **Order Amount Range**.
- 2. Search for specific items in the Search Bar.
- 3. Once you select everything you would like to view, click 'Filter.'

#### 4. If you need to restart or clear your search, click 'Reset'.

rder Report	oorts / Order Report	B I would	like to 🔻			New Emp	loyer New Ord	ler New Proposal	ک Book Appointment
Order Date					Order Amount				
MM	/ DD / YYYY	То	MM / DD / YY	ſYY			То		
Filter Reset	)							Show de	leted order list
Search:				Columns	(9 of 9) 🖹 Copy	Excel CS	/ 🕒 PDF Portrait	PDF Landscape	rint Show 100 rows
Showing 1 to 100 of	724 entries						Previous	1 2 3 4 5	8 Next
Order ID 🔺	Employer Name 🜲	Agency Name 🜲	Broker Name 🜲	Order Status	Order Date 🜲	Order Amount	Amount Paid 🜲	Order Created By 🖨	Broker Email
MCOD00022115	Test Company	Test James Agency , new test by anto esthak to meet this part execution @1	Maria s	Ordered	02/06/2025	650.00	0	Maria s	salih.shait3@gmc

#### SERVICES REPORTS

The **Proposals Report** page is where you have access to all your **Proposal Details**. You can select one of the following formats to save your results: **Copy**, **Excel**, **CSV**, **PDF Portrait**, **PDF Landscape**, and **Print**.

posal Report	orts / Proposal Report	品 I would I	like to 🔻			New	Ω Employer	F New Orde	er Nev	Proposal	Č Book Appointm
CUSTOM FILTER											-
roposal Amount	То		Proposal Dat MM /	te DD / YYYY	То	MM / DD / YYYY	Filter	Reset			
earch:				Colur	mns (11 of 16)	Copy Excel	]csv 🖪	PDF Portrait	PDF Landso	cape 🔒 Print	Show 100 rows
howing 1 to 100 of 91	4 entries				7			Previous	2 3	4 5 .	. 10 Next
Proposal Code 🔺	Service Category 🖨	Service Item 🜲	Employer 🝦	Agency 🌲	Broker 🖨	Date proposal genero	ated 🔷 🛛 P	roposal effect	ive date 🜲	Number Of El	igible Employee
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The **Compliance Checklist Report** page is where you can view the number of checklists you have run for an Employer and their scores. You can search by Employer name and select one of

the following formats to save your results: **Copy**, **Excel**, **CSV**, **PDF Portrait**, **PDF Landscape**, and **Print** 

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## RESOURCES

The **Resources** section is where you can find anything you may need while learning, navigating, or troubleshooting the Medcom Bridge. Under Resources, you will find **User Manuals**, **Brochures**, **Videos**, **Medcom Website**, and Medcom's **Blog** posts.



USER MANUALS

In the **User Manuals** section, you can find helpful guides on how to navigate the Medcom Bridge platform.

#### BROCHURES

#### Brochures

🏶 Medcom Bridge / Resou	Medcom Bridge / Resources / Brochures								
Recent Up	dates 0								
Categ	ories								
Compliance	(16)								
НІРАА	(4)								
Compliance Recharge	(1)								

The **Brochures** page is where you can find up-to-date marketing materials.

- 1. Select the **Category** of brochures you would like to view.
- 2. Click on the **brochure name** to view it.
- 3. To **Download** the selected material, click the **Download icon**.

#### VIDEOS

The **Videos** page is where you can go to find helpful and educational videos about **Compliance** and The **Bridge**.

*	Video Medcom Bridge / Library	/ Videos
	Recent Upd	ates 0
	Catego	ories
	Compliance RECHARGE	(10)
	Medcom Bridge	(7)
	Compliance	(3)
	HIPAA	(1)

#### MEDCOM WEBSITE

Medcom Website For Employees For Employers For Partners

The **Medcom Website** section offers helpful forms, tools, videos, and educational materials for all Medcom products, categorized by: Partners, Employers, and Employees.