COpower™

Benefits made easy

Quick Start Guide

GETTING STARTED WITH EMPOWER

The first screen you will see following login is the Empower Dashboard. The Dashboard provides you with an overview of your group statistics that include how many groups have active coverage, how many are up for renewal and what groups you have recently accessed. In the center of the page you will see alerts for your groups including those groups which are past due. On the right hand side you will have quick access to view your commissions.

Included on the left hand of the Dashboard page are your quick links to resources, forms, benefit information, and tutorials. In addition, there is a helpful newsfeed on the bottom of the page under "CoPower News" that includes relevant articles and updates related to CoPower and their carriers.

The top ribbon includes a selection of tabs where further information can be accessed and modified.

LET'S GET STARTED!

Click on the "Groups" tab to access your groups. You may search by Group Name or Group ID. Here you may also filter by specific criteria by placing a check mark in these sections: Active, Past Due, Terminated, and Upcoming Renewals.
TIP: You can save preset searches for quick access.

TO EDIT A GROUP PROFILE:

Click on the Group Profile page and select the edit button in the center of the page. Be sure to save your changes.

GROUP BILLING AND PAYMENTS:

To view the group Billing and Payments, from the group profile page, click on the "Billing and Payments" tab that is located on the left hand side.

GROUP PLANS TAB:

To view the Group Plans page, you may select the plan listed under "Plans" on the Group Profile Page, or you may select it from the menu on the left hand side that says "Plans".

MEMBERS TAB:

This page will list all members within a group and you may view, add, and edit member or dependent details as needed. You may search by first and last name, as well as filter by Dependents, Terminated Members, or COBRA Members.

TERMINATE MEMBER/DEPENDENT RECORD:

Navigate to the group profile page, click Member from the left menu, click on the member name, then click on "Terminate Member/Dependent Record" under the Member Actions Section. You will have the choice of terminating dependents only, or the member and all dependents. You must enter the requested termination date as well as the Termination Reason. Be sure to hit save.

COMMISSIONS:

Click on the "Commissions" tab. This page will display your commissions that have been paid out to you by CoPower. You can select your time frame on the left hand side of the page under "Year to Date". In addition, you may filter using "single month" or "Range" in which you can select a date range to view your commissions. The commission details displayed on this page are:

· Date
· Status
· Payment ID
· Payee Name
· Cleared Date
· Payment Method
· Total Amount

BROKER, AGENCY AND CONTACT TABS:

These pages will allow you to add and edit relevant information related to you and your agency.

SECURITY TAB:

This page will allow you to set the security of your files as well as modify roles, access, and views.

MY INFO TAB:

Here you may view and modify your communication preferences as well as your contact information. Use this page to:

· Change your user name
· Password