Broker Portal Instructions

Login to the Agent Portal

1. Go to pivothealth.com to register for your Agent Portal. Click “Log in” then click “Agents”.

2. Enter your Agent ID. (Your Pivot Health Agent writing number.)

3. You will receive an email with a temporary link to create a new password.

4. On the Agent Portal Home Page you can view Product specific marketing materials, web ads and brochures. Helpful Links provides the training calendar where you can signup for product training.

5. Scroll down the page and you will find buttons to Book of Business, Get a Quote, and helpful product information.

Start a Quote

1. To start to quote and enroll your clients click the “Get Quote” button. This will take you to your customized quoting URL.

2. Our quoting and enrollment system is easy to use and you can quickly start writing business with Pivot Health.

Manage Book of Business

1. To see all of your issued applications click on the “Book of Business” button.

2. The order number is the APP ID, the order date is the date the application was submitted.

3. Effective date is the request date the policy is active. Expiration date is the end date for the duration selected. Termination date is the cancellation date. Paid through date is the last date of coverage in which the last premium paid.

4. Your Book of Business includes all issued policies. The colored dots on the right hand side of the Monthly Premium indicates the policy status.
   - Red = Inactive Policy
   - Yellow = Pending Policy (A future policy effective date is a future date.)
   - Green = Active

5. You can get policy information by clicking the “w” next to your name and Agent ID #.

We look forward to working with you. If you have any questions please contact your Broker Account Executive or email agentsupport@healthcare.com