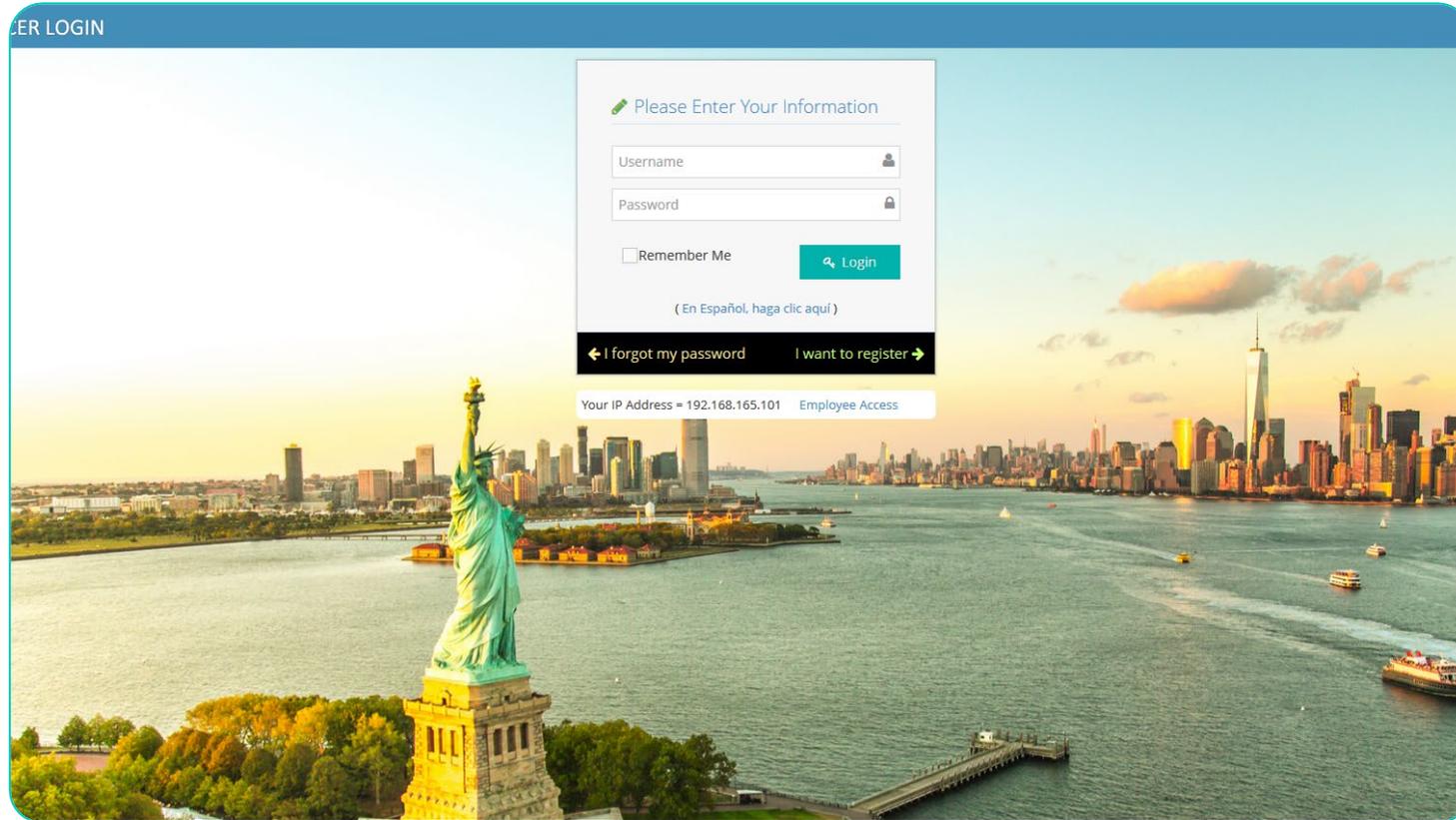


Welcome to Direct 2.0

Guide to Your New Enrollment Platform





Step 1

- Log into producer.manhattanlife.com

Step 2

- From your Dashboard, Click on Click to Launch in the blue area toward the top of the page

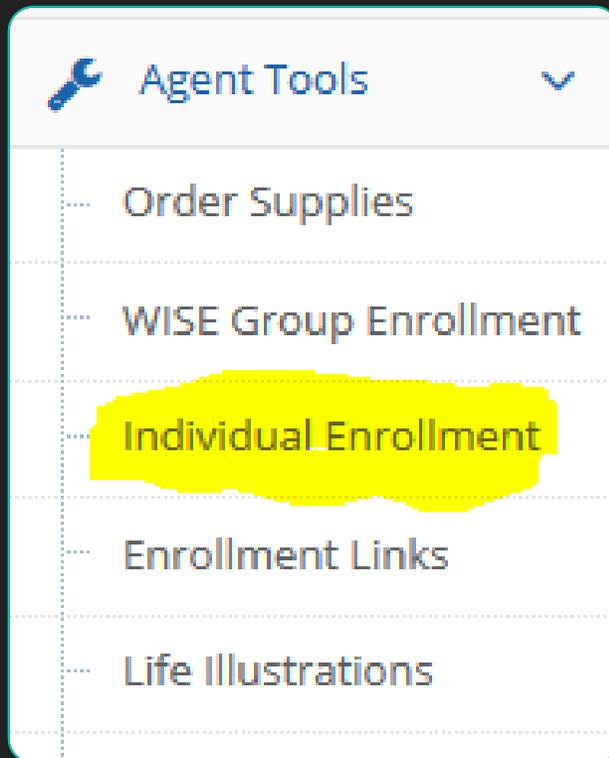
CONGRATULATIONS!

You are ready to start using the new ManhattanLife Direct 2.0!

Please Note: This does NOT yet include Medicare Supplement products, but we are working on it.

Click to Launch

Medicare Supplement Link



- If you are set up to sell our Medicare Supplement Product and need to access the online enrollment platform; you would:
 - 1. Look on the left-hand side of the page and click on the Agent Tools Tab
 - 2. Click on Individual Enrollment
 - 3. Click “Click to Begin” to access this application

Step 3

To Start your Application please click on Get Started on the Far-Right Hand side of the page.

Create New Quote



[+ Get Started](#)

Recent Saved Enrollments

Nothing here yet... Save an enrollment to come back and pick up where you left off!

Please Enter your Zip Code to Get Started

77092

Next >>

✓ Rates for HOUSTON, TX

Step 4

Client Will Enter Their Zip Code and the system will verify their City and State

Step 5:

Enter Clients
Information in Quote
Detail and click Next

Quote Details

HOUSTON, TX

First Name

Last Name

DOB 

Tobacco Yes No

Gender Male Female

Quote Details

HOUSTON, TX

First Name	Dependent Type	Birth Date	
<input type="text" value="FirstName"/>	--Select-- 	<input type="text" value="MM-DD-YYYY"/> 	<input type="button" value="Add"/>

Step 6:

If your client has a dependent, you will add their information here. You will enter the dependents first name, how they are related to the client, date of birth and Click Add, please note you must click the add button to add them to the quote.

If you have no dependent to add you can click, Select Product to move to the next screen.

Step 7:

- You are now ready to select your products. Simply Click on the product you wish to write



Accident Insurance

Plans Starting at \$15.50 Monthly Rate



Affordable Choice

Plans Starting at \$64.68 Monthly Rate



Cancer Care Plus

Plans Starting at \$23.47 Monthly Rate



Cancer First Occurrence

Plans Starting at \$5.50 Monthly Rate



Dental, Vision and Hearing Insurance

Plans Starting at \$30.25 Monthly Rate



Out-of-Pocket Protection Plan

Plans Starting at \$10.50 Monthly Rate

Step 8:

After you click on the product you are then redirected to select the plan



Plans

2018 - Elite Plus	\$163.41
2018 - Classic	\$64.68
2018 - Elite	\$119.65
2018 - Classic Plus	\$89.30

Benefits Description

 AFC18-4BR_0119.pdf

Plan Options

Plan Effective Date

01-18-2020



Payment Schedule

Monthly



✓ In Cart
✕



Selected Plan:

Selected Plan: 2018 - Elite Plus
 \$163.41

Benefits Description

[AFC18-4BR_0119.pdf](#)

Plan Options

Plan Effective Date

Payment Schedule

Total: \$163.41

Remove from Cart

Return to Product List

Step 9:

Once a plan is selected and you are redirected to this page you can:

- 1. See the Monthly Premium
- 2. Change the Plan Effective Date
- 3. Change the payment schedule (quarterly, semi-annually, annually)
- 4. View the Brochure under Benefits Description

Once you have completed this you will select Return to Product List to add another product or start your application or Remove from Cart if you wish to remove the plan and select another one.

	<p>Affordable Choice <i>Quote Price \$163.41</i></p>	<p>Cart: \$163.41</p> <table border="1"> <tr> <td>Affordable Choice</td> <td></td> </tr> <tr> <td>2018 - Elite Plus</td> <td style="text-align: right;">\$163.41</td> </tr> <tr> <td></td> <td style="text-align: right;">\$163.41</td> </tr> </table>	Affordable Choice		2018 - Elite Plus	\$163.41		\$163.41
Affordable Choice								
2018 - Elite Plus	\$163.41							
	\$163.41							
	<p>Accident Insurance <i>Plans Starting at \$15.50 Monthly Rate</i></p>							
	<p>Cancer Care Plus <i>Plans Starting at \$23.47 Monthly Rate</i></p>							

Step 10:

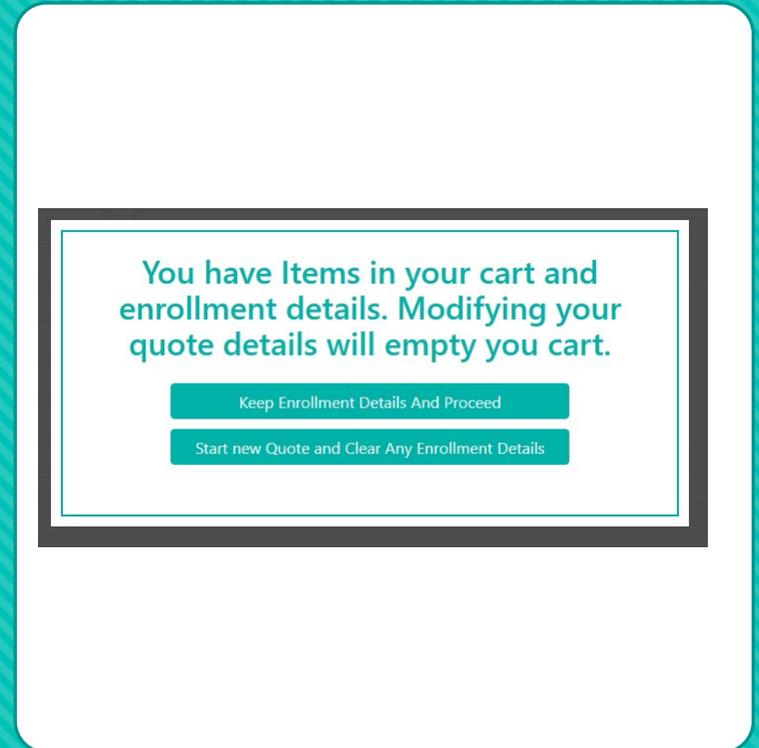
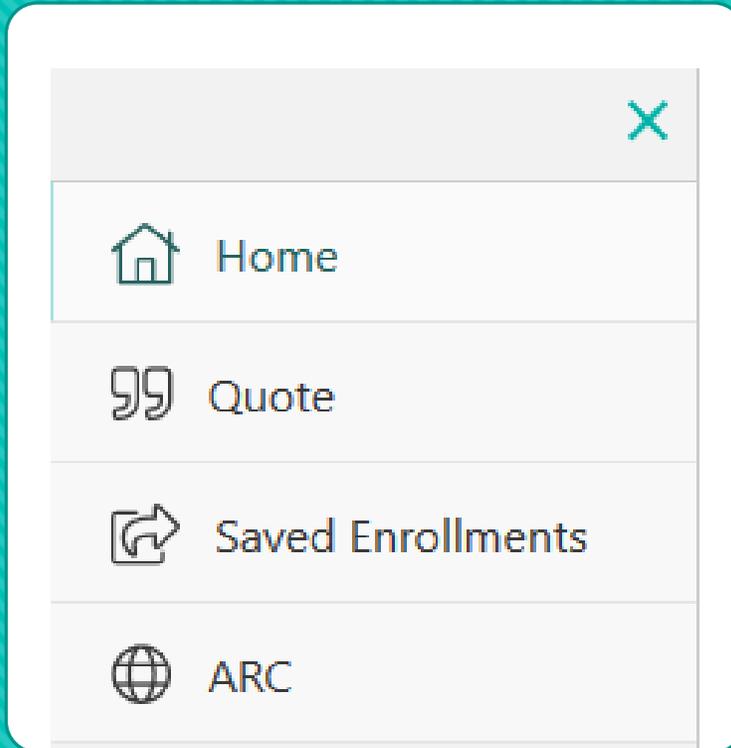
- After selecting Return to Product List you are redirected to the product page to select another product.
- Also you will see your Cart, this gives information about the Product(s) and Plan(s) you have chosen as well as the total premium for you and your client to easily view.

	Accident Insurance <i>Quote Price \$22.00</i>	Cart: \$185.41 <hr/> Affordable Choice <hr/> 2018 - Elite Plus \$163.41 <hr/> \$163.41 <hr/> Accident Insurance <hr/> 24 Hour Coverage - 2 Unit \$22.00 <hr/> \$22.00
	Affordable Choice <i>Quote Price \$163.41</i>	
	Cancer Care Plus <i>Plans Starting at \$23.47 Monthly Rate</i>	

[Begin Enrollment](#)

Step 11:

- To add an additional product please follow steps 11-14.
- If you add another product your cart will atomically update once you hit the Return to Product button.
- Once you have added all products, you will click Begin Enrollment; located at the bottom of this page.



If you need to make a change to the quote itself; you can click on the 3 lined menu button located at the top of the left-hand side of your page.

A menu will appear, and you have the option to click on four options.

Legend of the Menu:

1. Home-Home Page of Manhattan Direct 2.0
2. Quote—Make Changes to your Current Quote or Start Over
3. Saved Enrollments—View Your Saved Enrollments
4. ARC—Agent Resource Center to View Policies, Commissions, Brochures, Applications etc.

If you are making changes click on Quote, then Keep Enrollment Details this will take you to the beginning of the current quote you are running for your client. If you would like to start over simply click on Start new quote and Clear Any Enrollment Details.

Step 12:

- We have added a Send Quote/Save As option, this is located on the top right-hand side of the page.
- This feature will allow you to send the quote directly to your client by email or text as well as Save the application. *This feature is available on every page of the application, therefore no matter where you are in the application process you will have the ability to Send the Quote or Save it.
- To use this feature:
 - 1. Simply click on Send/Quote/ Save As
 - 2. Enter the Clients Name and if you wish to Send the Quote; check the box that says "Send Quote to Enrollee?"; if not simply click Save
 - 3. If you would like to Send the Quote; enter the Clients full name, email or phone number or both and click Save.
 - 4. The green check ensures the quote is saved now if you need to save the application anywhere throughout the process simply hit the Update button to save your progress.

1.

Options

Current Save: **Manhattan Life** ✓

▲ Update

📄 Send Quote / Save As...

+ Add Products

2.

Save New Enrollment

Name

Name your saved enrollment

Manhattan Life

Send Quote to Enrollee?

Save Cancel

3.

Save New Enrollment

Name

Manhattan Life

Send Quote to Enrollee?

Enrollee Full Name

Manhattan Life

Enrollee Email (for e-mail notification)

test@test.com

Enrollee Phone (for SMS/text message notification)

555-555-5555

Save Cancel

The screenshot shows a web-based application form with a progress bar at the top containing four steps: Applicant, Information, Questions, and Review. The 'Applicant' step is currently active. The main form area is titled 'Applicant' and has a 'Details' tab selected. It contains several input fields: First Name (Test), Middle Name (Middle Name), Last Name (Test), SSN (123456789), Birth date (01-01-1991), Gender (Female), Height (5 feet 1 inch), and Weight (100 lbs). On the right side, there is a sidebar with a list of sections: Options (Send Quote / Save As..., Add Products), Affordable Choice (2018 - Elite Plus), Accident Insurance (24 Hour Coverage), Applicant (checked and highlighted green), Email Consent, Dependent (checked and highlighted green), Payment, Beneficiary, Insured Authorization And Signature, Agent, and Application Questions. At the bottom right of the page, there are two buttons: 'Next' (teal) and 'Validate' (yellow).

Step 13:

- Now you are ready to fill out the application.
- We have simplified our application process, now you will enter the client's information one time and we will distribute this information to the correct application.
- Each section of the application is named on the Right-Hand Side of the page; as you complete the section the Section Name will turn Green to validate you have completed it.
- You will then click Validate at the bottom of the page to move to the next section

Just a Reminder: You can save your application on any page by simply clicking Update under Current Save on the right-hand side of the page

Applicant Information Questions Review

Application Questions

Have you taken any prescribed medications with in the last 12 months? Yes No

Is any person to be insured engaged in any hazardous sports or activities including racing, but not limited to parachuting, rodeo riding, motorcycling, mountain climbing, scuba diving or intend to do so? Yes No

Is any person to be insured a member/participant in a semi-professional or professional sport? Yes No

Have you had a driver's license suspended or revoked within the past 3 years? Yes No

Have you had a DWI or DUI within the past 3 years? Yes No

Options

Current Save: **Manhattan Life**

Affordable Choice
2018 - Elite Plus

Accident Insurance
24 Hour Coverage

- Applicant
- Email Consent
- Dependent
- Payment
- Beneficiary
- Insured Authorization And Signature
- Agent
- Application Questions

Step 14:

You are now ready to submit your application.

First Click Next then the same button will change to Submit Application.

Have you had a driver's license suspended or revoked within the past 3 years? Yes No

Have you had a DWI or DUI within the past 3 years? Yes No

Is any person to be insured currently under treatment or has any person to be insured been under treatment for drug or alcohol abuse in the past 3 years? Yes No

[Previous](#) [Next](#)

Have you had a driver's license suspended or revoked within the past 3 years? Yes No

Have you had a DWI or DUI within the past 3 years? Yes No

Is any person to be insured currently under treatment or has any person to be insured been under treatment for drug or alcohol abuse in the past 3 years? Yes No

[Previous](#) [Submit Application](#)

- Insured Authorization And Signature
- Agent
- Application Questions

Step 15:

Now you will see your Cart Details at this point you can download each application and have one more verification of the product(s) your client has applied for.

We also verify that the applications were submitted successfully, and the Agent Home button takes you to the beginning of 2.0

Enrollments have successfully been submitted

Go to Agent Home Page

 Agent Home



Enrollment Id: 2008805
Product: Accident Insurance
Plan: 24 Hour Coverage

 Download PDF



Enrollment Id: 2008806
Product: Affordable Choice
Plan: 2018 - Elite Plus

 Download PDF

Some things to know:

1. Your saved enrollments are listed on Manhattan Direct 2.0 Home Page as well as the date you saved it.
2. As you write business you will see the policies listed under the appropriate section.

The screenshot displays the Manhattan Direct 2.0 Home Page dashboard. At the top, there are four teal-colored summary cards: 'Policies' with a count of 0, 'Lapsed policies' with a count of 0, 'Rejected Premiums' with a count of 0, and 'Cancelled Policies' with a count of 0. Below these cards is a table with the following columns: Policy Number, InsuredName, Effective Date, Paid To Date, Policy Status, Annual Premium, Product, Plan, and State. The table is currently empty. On the right side of the dashboard, there is a 'Create New Quote' section with a photo of two people at a desk and a green 'Get Started' button. Below that is a 'Recent Saved Enrollments' section showing one entry: 'Manhattan Life: 1/17/2020'.

Policy Number	InsuredName	Effective Date	Paid To Date	Policy Status	Annual Premium	Product	Plan	State
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Create New Quote

[+ Get Started](#)

Recent Saved Enrollments

Manhattan Life: 1/17/2020