

Generate Email Link to Customer

The 'Generate Email Link to Customer' allows the Producer to send an email to an applicant with a link that the applicant can use to apply electronically with Highmark. This link will provide credit back to the Producer who generated the link for the sale if the applicant is enrolled into the applied for program.

To create the email and link, follow this procedure:

1. Log in to the Highmark Producer Portal using your AGT login ID and password
2. Click on the New Business Tab
3. Select the Generate Email to Customer link on the left menu

The screenshot shows the Highmark Producer Portal interface. At the top, there is a search bar and a navigation menu with tabs for 'NEW BUSINESS', 'YOUR CLIENTS', 'YOUR AGENCY', 'RESOURCES', and 'TRAINING'. The 'NEW BUSINESS' tab is selected. On the left side, there is a navigation menu with the following items: 'New Business', 'Generate Quote & Apply', 'Saved Quotes & Applications', 'Ind/Fam Benefit Grids', and 'Generate Email to Customer'. The 'Generate Email to Customer' link is circled in red. The main content area displays a 'Welcome,' message and a 'New Business' heading. Below this, there is a text block: 'Use these helpful tools to sell Highmark coverage to more of your new business prospects.' On the right side, there is a 'Quick Resources' sidebar with links for 'Find a Provider', 'Producer News', 'Frequently Used Links', 'Change Your Password', and 'Website Status'.

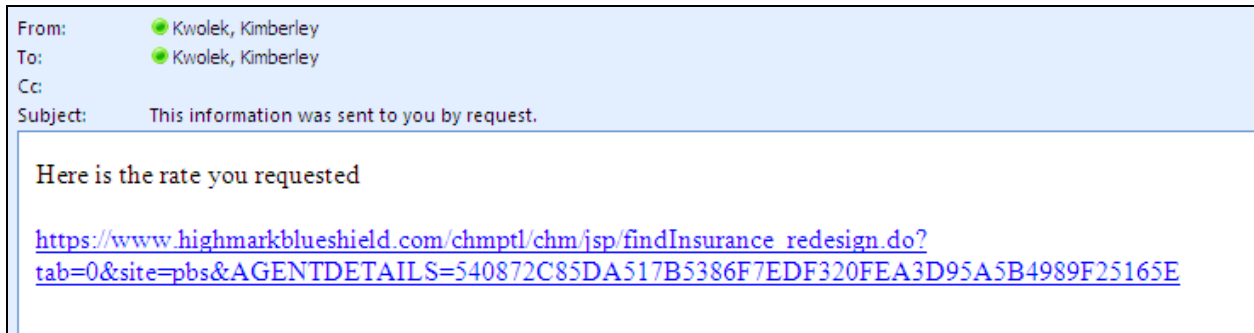
4. Complete the email form and send to the client and/or yourself. Multiple email addresses can be used if you separate them with a comma.

The screenshot shows the 'E-mail Information' form. The form is titled 'E-mail Information' and contains the following fields and instructions:

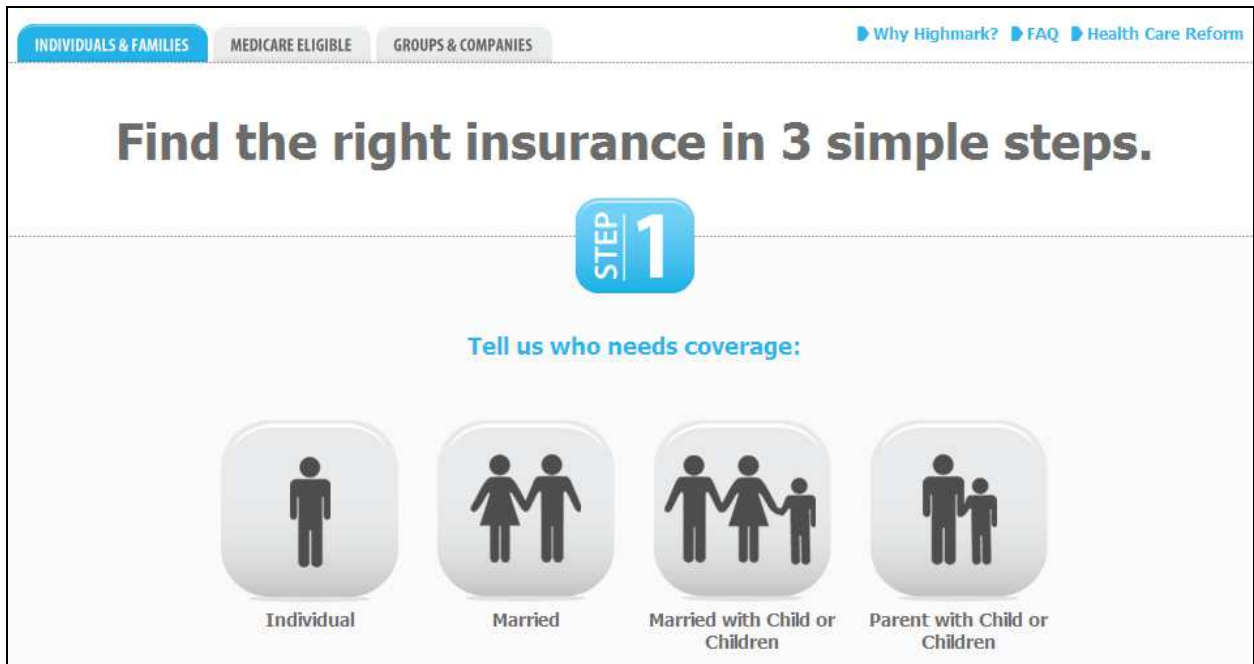
- To E-mail Address:** A text input field.
- From E-mail Address:** A text input field.
- Agency ID:** A text input field with a small icon to its right.
- Producer Number:** A text input field.
- Message:** A large text area with a small icon to its right.
- Please type the word appearing in the picture:** A text input field with a small icon to its right.

The word 'fishing beetle' is displayed in a box next to the CAPTCHA field. At the bottom of the form, there are two buttons: 'Cancel' and 'Email'.

- When the applicant clicks on the link in the email, they will be taken to Step 1 under Individual & Families of the appropriately branded Highmark website (based upon the login ID you used to generate the link) where they can then choose a product and apply.



- If the applicant completes the application process using the link, your producer information will be attached to the electronic application and you will be provided credit for the sale if the applicant is enrolled.



Please note: The email generated through this process can be used multiple times and can be emailed to multiple applicants. It is not necessary to request a new email to customer each time you wish to use the process.