

Getting Started with SureBridge!

Welcome to the SureBridge Family!

The SureBridge brand name and tagline “Covering Life’s Twist and Turns” was selected by The Chesapeake Life Insurance Company (CLICO) to help communicate to consumers the value our products provide - most plans provide cash benefits, paid directly to the customer, that can be used to cover daily living expenses or other expenses not covered by medical insurance. The competitive advantages for SureBridge include:

- ▶ A broad product portfolio in the individual market that complements virtually any health, major medical insurance or Medicare plan.
- ▶ Simple plan designs which are easy to cross-sell with health plans and provide an attractive commission opportunity to agents.
- ▶ Technology that supports and simplifies the sales process for the producer and the customer.
- ▶ Plans available in most states.

What You Need to Know to Get Started with SureBridge

Now that you have received your Welcome email containing your **Agent ID**, **Username** and separate email with your **Temporary Password**, you have immediate access to your Broker Portal. Please log in as soon as possible, to create a new password and get familiar with the functionality of your Broker Portal.

NEXT STEPS:

1. Upon Initial Access to the Broker Portal:

Using the **Username** and **Temporary Password** from your Welcome emails, you will be required to create a new password. To continue, you will log in again using your new password. You will then be required to verify your identity via your choice of email, text, or automated phone call. See detailed Instructions [here](#).

2. Complete Mandatory Training Course:

Once logged in using your new password, you will automatically be taken to a required training course that will take approximately 20 minutes to complete. Once completed, you will have full access to your Broker Portal.

3. Set Up Direct Deposit (If applicable):

From the **Direct Deposit** tab, you will be able to add banking information and set your payment preference to Direct Deposit once logged in. For security purposes, you will be required to enter the same Username & password used to access the Broker Portal and the last five (5) digits of your SSN.

4. Browse the Portal Functionality:

From the **Reports** tab, you will be able to access reports (i.e. Book of Business, Take Action (overdue payments), and your Customer’s Claims Status). From the **My Account** tab, you will be able to access your personal commission statements.

Also available on your Broker Portal:

- ✓ **Get Training** - From the Training tab, access Point-of-Sale Tool Video Tutorials and additional training documents. You’ll also find training on SureBridge products and other topics inside of **SureBridge University**, which you can access by clicking the “**SBU Continu LMS**” link.
- ✓ **Underwriting Guides** - From the **Home** page, view underwriting rules, important information about Supplemental products along with other useful information.
- ✓ **Access the Point-of-Sale Tool** - From the **Home** page, click on the **SureBridge Quote & Apply** to make sales of SureBridge Products.
- ✓ **Contact Us** - From the **Home** page, you will find Producer Support & Member Services contact information.
For training questions on the **Training** page, you will find contact information for Producer Training, Sales and Producer Support.



SureBridge Product Strategy

We provide a full portfolio that complements any health plan. Comprehensive training is available on the Broker Portal at <http://www.suppsportal.com>.

Plans Available for Under 64 Market Only

Accident Plans

Options range from smaller benefit payments for a variety of conditions sustained or services received, to those targeting catastrophic accidents with lump sum benefits.

Disability Plans

Provide benefits for short-term disability resulting from an accident or illness

Indemnity Plan (Metal Gap)

Plan pays daily cash benefit for medically necessary covered inpatient hospital confinements.

Term Life

Provides a lump-sum cash death benefit to designated beneficiaries, with 10- and 20-year term options. Optional Riders are available in most states for additional cost.

Plans Available for Under 64 & Senior* (64+) Markets

*Senior Plans not in all states

Dental, Vision and DVH** Plans

Multiple plan designs leveraging provider networks to offer combinations of coverage and discounts for exams and treatment. Vision also offers low co-payments on lenses and discounts on vision products and services. **The DVH plan combines Dental, Vision & Hearing benefits under one plan for a single premium.

Illness Plans

Provide a lump sum cash benefit on a first diagnosis of a covered critical illness or qualifying event within the Cancer or Heart/Stroke categories. Optional Riders are available in most states for additional cost.

Indemnity Plans

(Fixed Indemnity & HospitalWise)
Plans pay daily cash benefits for medically necessary covered inpatient hospital confinements.

GetWell

A suite of wellness products providing services such as discounts, 24/7 consultations via phone or web with physicians, fitness planning and identity theft management.

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Your SureBridge Broker Portal at a Glance

<https://www.suppsportal.com>

The screenshot shows the SureBridge Producer Home Page with several callouts pointing to specific features:

- View Reports (Your Customer's Claims Status, Book of Business, & Take Action)**: Points to the 'Reports' tab in the navigation menu.
- Access Training (SureBridge University, Point of Sale Tool Videos & other Training Documents)**: Points to the 'Training' tab in the navigation menu.
- Access Your Commission Statements**: Points to the 'My Account' tab in the navigation menu.
- Set up & manage Direct Deposit**: Points to the 'Direct Deposit' tab in the navigation menu.
- Access Product Brochures, Forms, Misc. Documents & Medicare Handbooks**: Points to the 'Tools' tab in the navigation menu.
- Look for Important Announcements from SureBridge**: Points to the 'Product Announcements' section.
- Access a copy of the "Getting Started with SureBridge"**: Points to the 'Getting Started' link in the Reference Library.
- Access the Supplemental Underwriting & Product Guide**: Points to the 'Underwriting Guides' link in the Reference Library.
- Contact Information for Producer Support & Customer Service**: Points to the 'Support' section.
- Access the Point of Sale Quoting Tool**: Points to the 'Quick Links' section.
- Additional Access to Your Commission Statements**: Points to the 'My Account' button.
- Access to Employer List Billing: Allows one billing through an Employer for Employee paid SureBridge Supplemental plans**: Points to the 'Employer List Bill Enrollment' button.

Producer Home Page

For agent purposes only – not for consumer use.