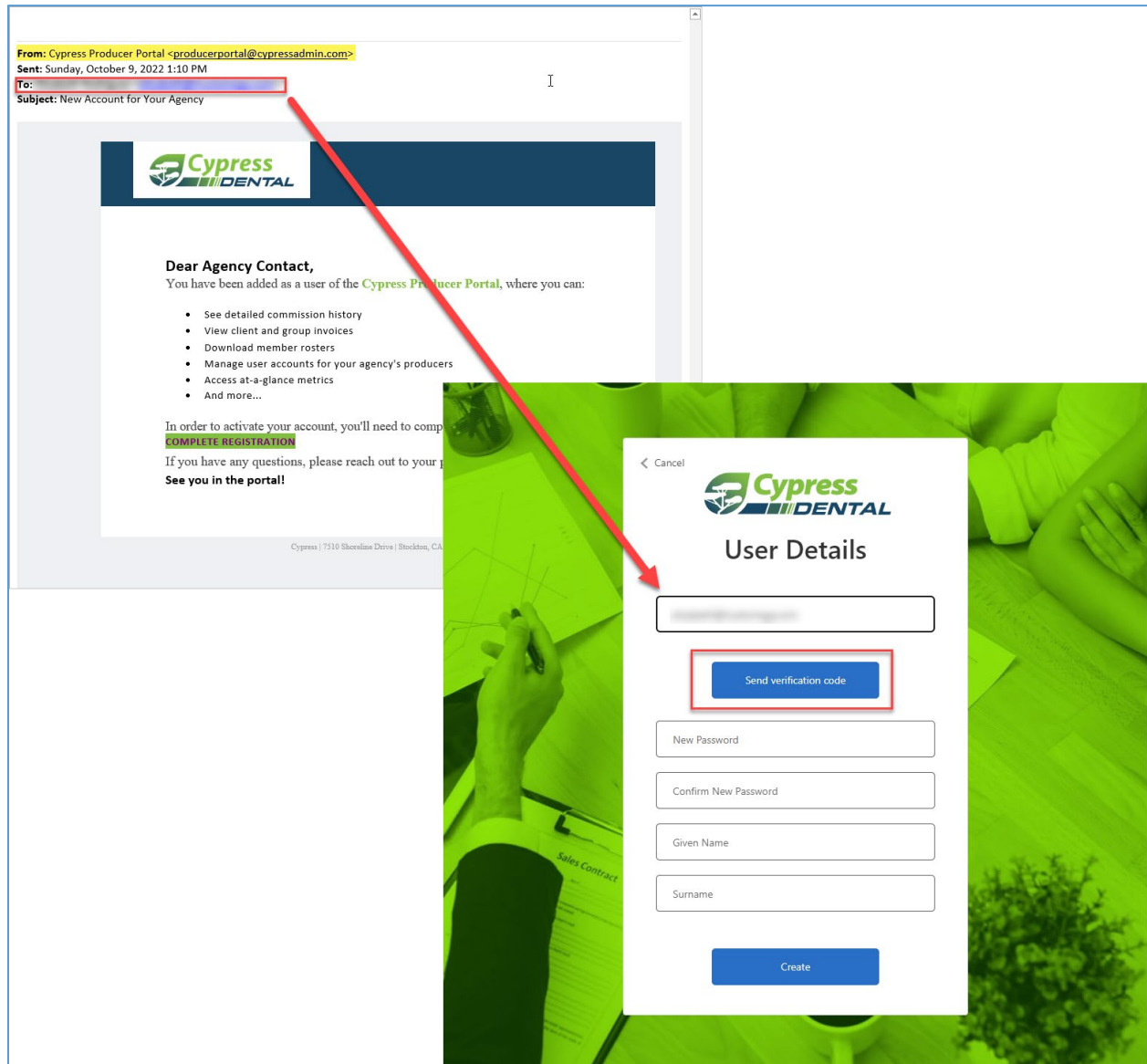


Producer Portal FAQ

Q: I am the primary Agency Admin, how do I register for the Cypress Producer Portal?

You will receive an email invite from Cypress Producer Portal to the email address that we have on file for you as the Admin. Click on “Complete Registration” and enter the exact email address in the Producer Portal registration screen that the invite email was sent to. Then click “Send Verification Code.”



From: Cypress Producer Portal <producerportal@cypressadmin.com>
Sent: Sunday, October 9, 2022 1:10 PM
To: [Redacted]
Subject: New Account for Your Agency

Cypress DENTAL

Dear Agency Contact,
You have been added as a user of the **Cypress Producer Portal**, where you can:

- See detailed commission history
- View client and group invoices
- Download member rosters
- Manage user accounts for your agency's producers
- Access at-a-glance metrics
- And more...

In order to activate your account, you'll need to complete **COMPLETE REGISTRATION**.
If you have any questions, please reach out to your Agency Admin.
See you in the portal!

User Details

[Redacted Email Address]

Send verification code

New Password

Confirm New Password

Given Name

Surname

Create

Go back to your emails and find the verification email with your code. Then take this code and enter it into the verification code field on the Producer Portal Registration Page and click “Verify Code.”

Reply Reply All Forward
Mon 10/10/2022 3:14 PM
Microsoft on behalf of Cypress Producer Portal Prod <msonlineserv
[EXTERNAL] Cypress Producer Portal Prod account email verification code

To
Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

ATTENTION: This email originated from a sender outside of SKYGEN. Use extreme caution if you click links or open attachments.

Verify your email address

Thanks for verifying your [redacted] account!

Your code is: **441866**

Sincerely,
Cypress Producer Portal Prod

This message was sent from an unmonitored email address. Please do not reply to this message.

Cypress DENTAL

User Details

Verification code has been sent to your inbox. Please copy it to the input box below.

[redacted]

441866

Verify code Send new code

New Password

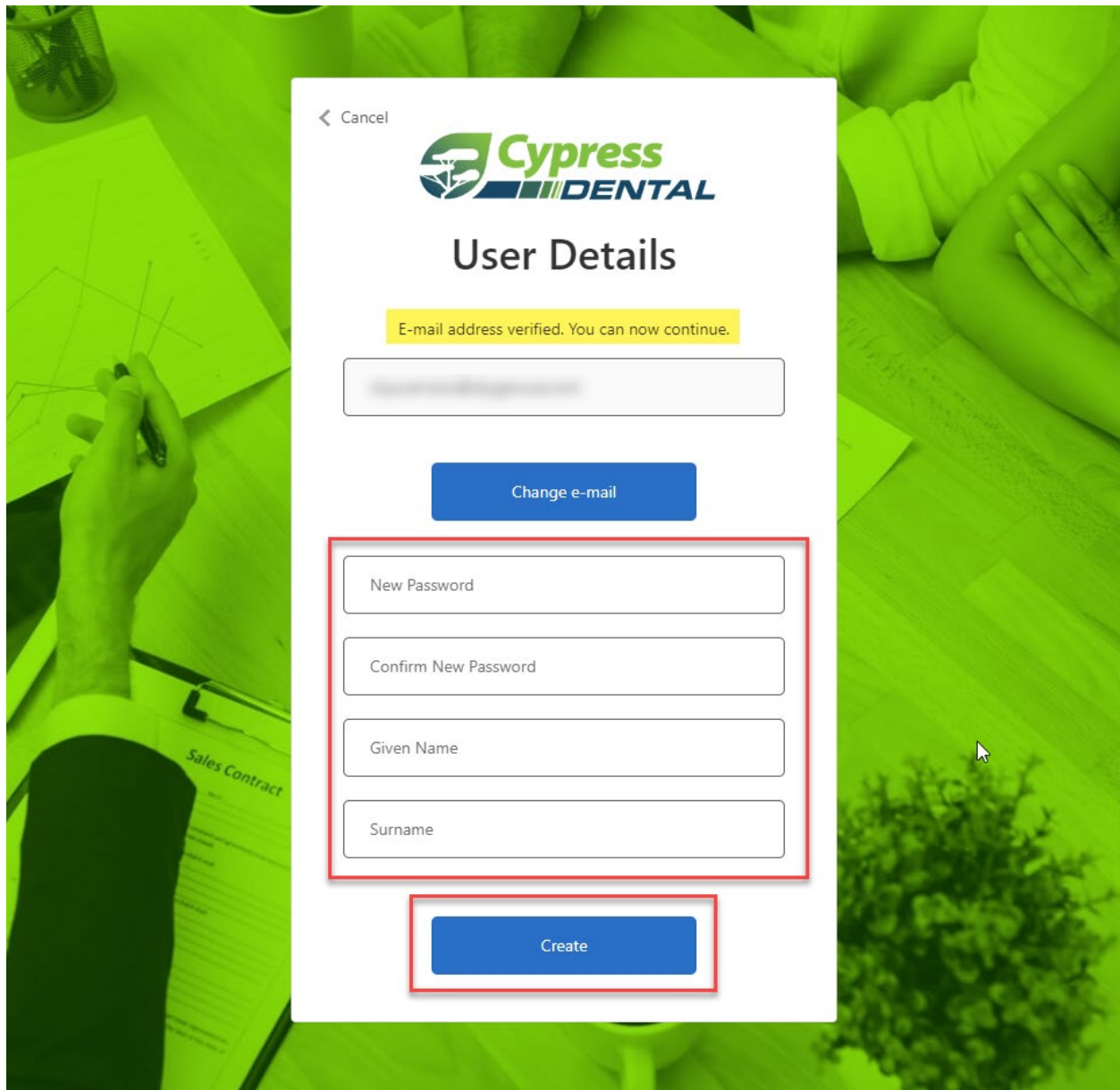
Confirm New Password

Given Name

Surname

Create

When you see the notification “E-mail address verified. You can now continue.” You can then complete the rest of the fields and click “Create.”



Q: Can there be more than one Agency Admin?

Yes, however, the original Agency Admin will need to be registered on the Producer Portal in order to invite other Agency Admins.

Q: How do I add another Admin Contact to my Agency?

1. From the Agency menu item, click Invite Admin
2. A pop-up entry box will appear. Enter the email address of the Admin contact and click Confirm

BENEFITS, INC.

BROKERS **AGENCY ADMINS** USER MANAGEMENT **+ INVITE ADMIN**

Invite Agency Admin

CANCEL **CONFIRM**

Enter the email address for the person you'd like to invite to be an administrator for your agency. Please note that this new user account will have the same rights and permissions as your own.

Email Address
testagent@gmail.com

Q: How do I change the primary Agency Admin contact?

The Agency Admin that receives the initial invite should register and they can then still accept and add a user that would have the same access as they do. If the Agency Admin is no longer with the Agency, please reach out to Cypress and they will submit a change request on your behalf.

Q: How do I add Brokers?

1. Click on "Agency" in the top navigation bar. This will expose the list of brokers associated with your agency.
2. Select the broker you are inviting to join the portal and click on the Envelope icon to invite them.

If a broker is missing from the list that appears for your agency, please contact Cypress to have the broker added.

BROKERS AGENCY ADMINS USER MANAGEMENT

Broker First Name Broker Last Name Email Status CLEAR

<input checked="" type="checkbox"/>	First Name	Last Name ↑	Email	Phone	Status	INVITE
<input type="checkbox"/>	:		DentalProviderPortal@skygenusa.c...	N/A	Accepted 12-12-2022	
<input checked="" type="checkbox"/>	JENNIFER	MULLINS	emailtest@gmail.com	N/A	None	

Q: How do I update member information?

1. Under My Clients, click on a Client Name

Cypress DENTAL MY CLIENTS COMMISSIONS AGENCY PROVIDER SEARCH

My Clients 7 GROUPS / 3 CLIENTS / 4 2022 NEW GROUPS

GROUP PLANS EXPORT

Group No Client Name Group Name Status CLEAR

Group No	Client Name ↑	Group Name	Location	Effective	Termination	Status
20201998	ADJCS	ADJGroup	MILWAUKEE, WI	01-01-2000	N/A	Active
PRDTS	Dunder Mifflin	Dunder - Cypress Products	Chicago, IL	01-01-2022	N/A	Active
NO-ACCESS	Dunder Mifflin	Dunder - No Access 1	Chicago, IL	01-01-2021	N/A	Active
GROUP	Dunder Mifflin	Dunder - No Access 2	Chicago, IL	01-01-2022	N/A	Active
DAYS	Dunder Mifflin	Dunder - Plus Days	Chicago, IL	01-01-2022	N/A	Active
SCRAN	Dunder Mifflin	Dunder Mifflin - Scranon	Chicago, IL	01-01-2000	N/A	Active
N/A	Group Level Billing Client	COMMITMENT - Barbach Agency Assigned	N/A	01-01-2022	N/A	Active

2. Click on Group Name:

MY CLIENTS

Dunder Mifflin

Fax (237)894-2387

Email dustin@dundermifflin.com

Group: Email: Status:

Group No ↑	Group Name	Location	Email
DAYS	Dunder - Plus Days	Chicago, IL	dustin@dundermifflin.com
GROUP	Dunder - No Access 2	Chicago, IL	dustin@dundermifflin.com
NO-ACCESS	Dunder - No Access 1	Chicago, IL	dustin@dundermifflin.com
PRDTS	Dunder - Cypress Products	Chicago, IL	dustin@dundermifflin.com
SCRAN	Dunder Mifflin - Scranton	Chicago, IL	dustin@dundermifflin.com

3. Locate member that you want to edit:

Members EXPORT + ADD MEMBER

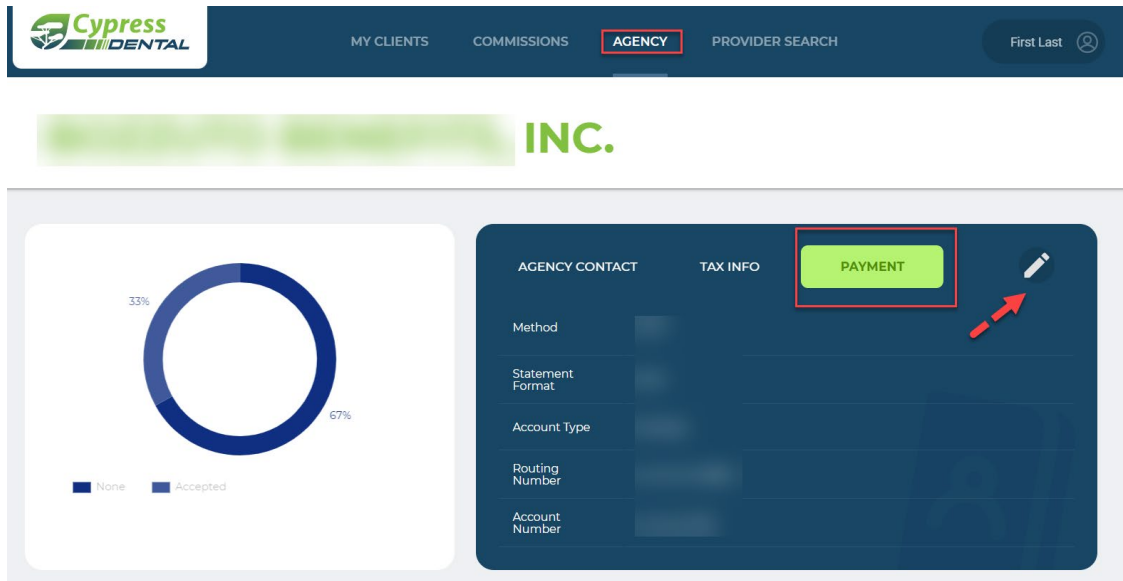
ID: First Name: Last Name: Status: CLEAR

ID	First Name	Last Name	Type	Date of Birth	Plan Name	Status
13450522154862	ed	helm	Policy Holder	09-09-1988	Cypress DHMO	Active

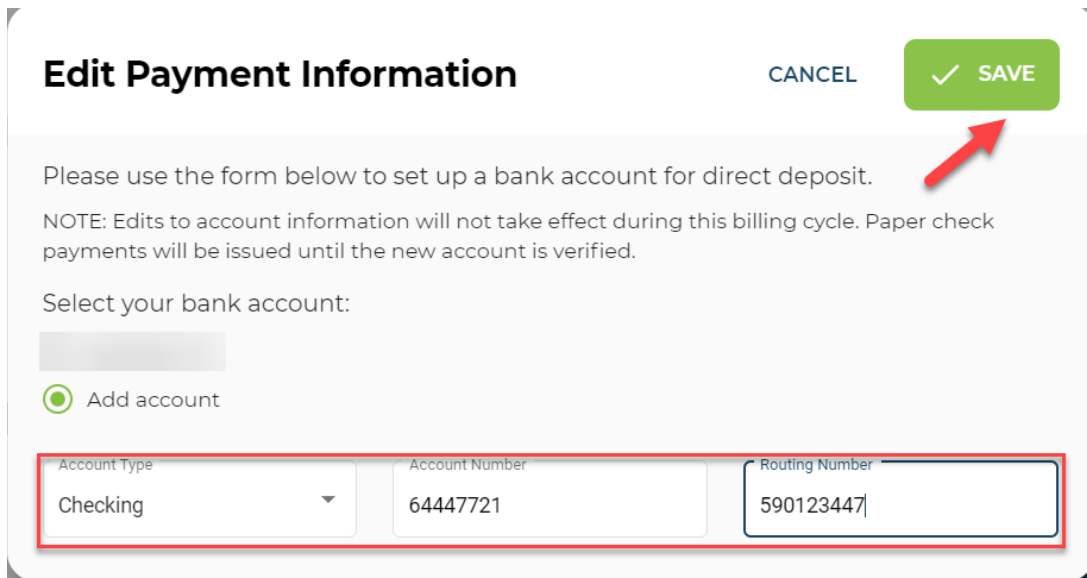
4. Editable if pencil icon is available:

Q: How do I sign up for Direct Deposit?

Under the Agency menu, select the Payment option and click the pencil icon to begin editing your agency's payment details



A pop-up box will appear. Select "Add account," identify the account type: Checking or Savings, enter the account and routing numbers and Click save.



Q: Who can see Group Invoices?

The broker at an agency must be associated with the group in order to see the invoices. If another broker at the agency is associated or no broker is associated, the record will need to be adjusted in order for the invoice to appear in the broker's portal view.

Q: Can I download an ID Card?

Yes, you have the ability to download and print a PPO ID card.

Q: Will brokers see only their clients or all clients of the agency?

Agency Admin can see all clients. Brokers will only be able to see their own clients.