



List bill walkthrough

Agent Back Office

For agent use only. Not for distribution to customers.

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Overview

Setting up a list bill account
Enrolling a list bill member
Managing list bill accounts



List bill accounts



List bill is available to employer and non-employer groups with two or more members.

Group eligibility is reviewed upon submission of the list bill account agreement.

Note:

- Short Term Medical plans are **not** available for list bill.
- Some states may restrict list bill availability for supplemental insurance plans.



Setting up a list bill account



Walkthrough setting up a list bill account



Security Updates

We have created a new two-factor registration process for Allstate Benefits and Allstate Health Solutions to provide you with an added level of security. Please sign in with your credentials and follow the directions.

If you have any issues trying to sign-in or register, please contact [AH security](#).

My Agent Login



Show

Log In

[Forgot Username?](#)[Forgot Password?](#)

Log in to Agent Back Office.

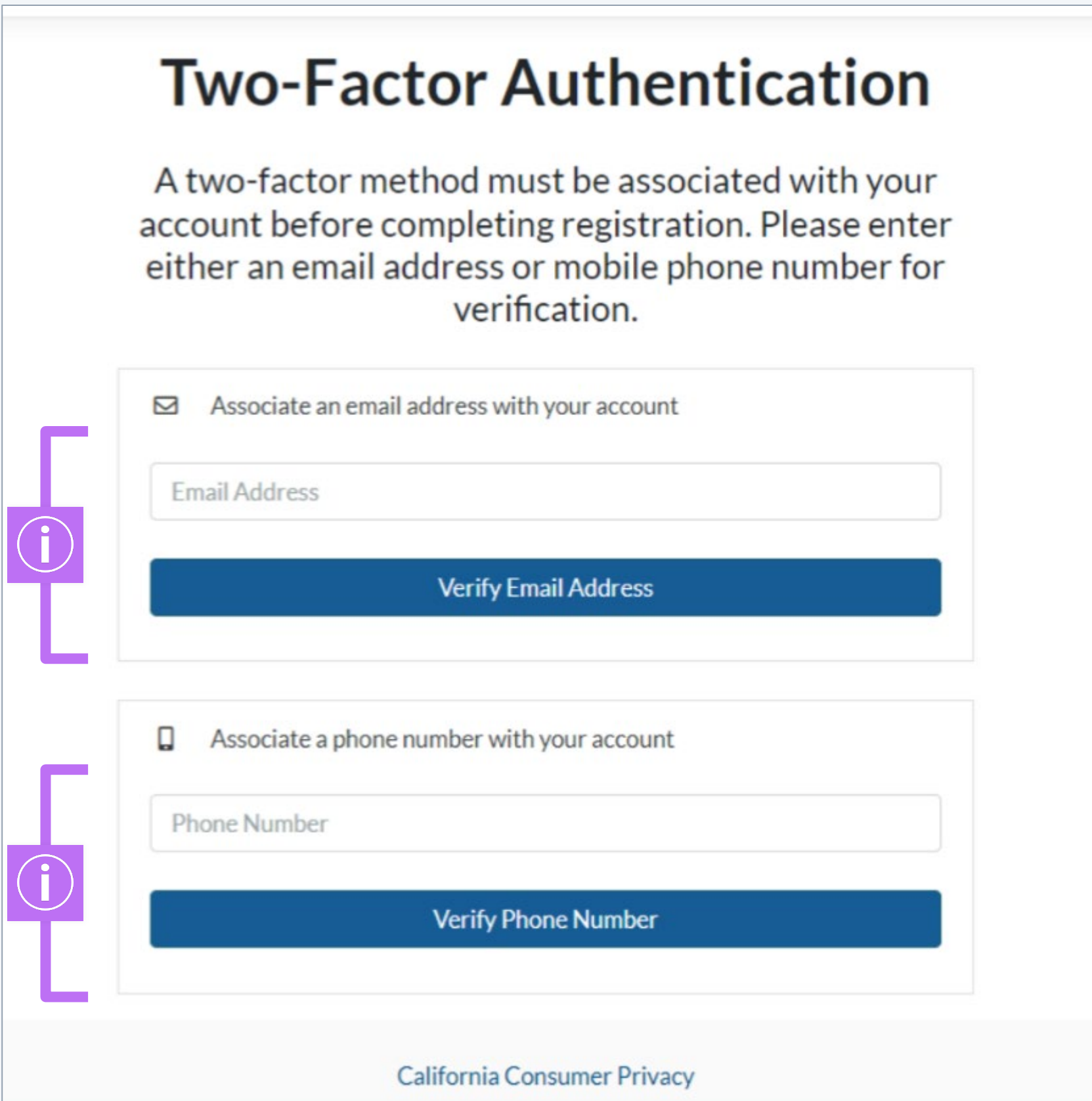
- Go to:
login.ngahagents.ngic.com
- Enter username and password.
- Click on **Log In**.

For additional assistance:

- Call Agent Support at (888) 376-3300.



Walkthrough setting up a list bill account



Two-Factor Authentication

A two-factor method must be associated with your account before completing registration. Please enter either an email address or mobile phone number for verification.

☒ Associate an email address with your account

Email Address

Verify Email Address

☐ Associate a phone number with your account

Phone Number

Verify Phone Number

[California Consumer Privacy](#)

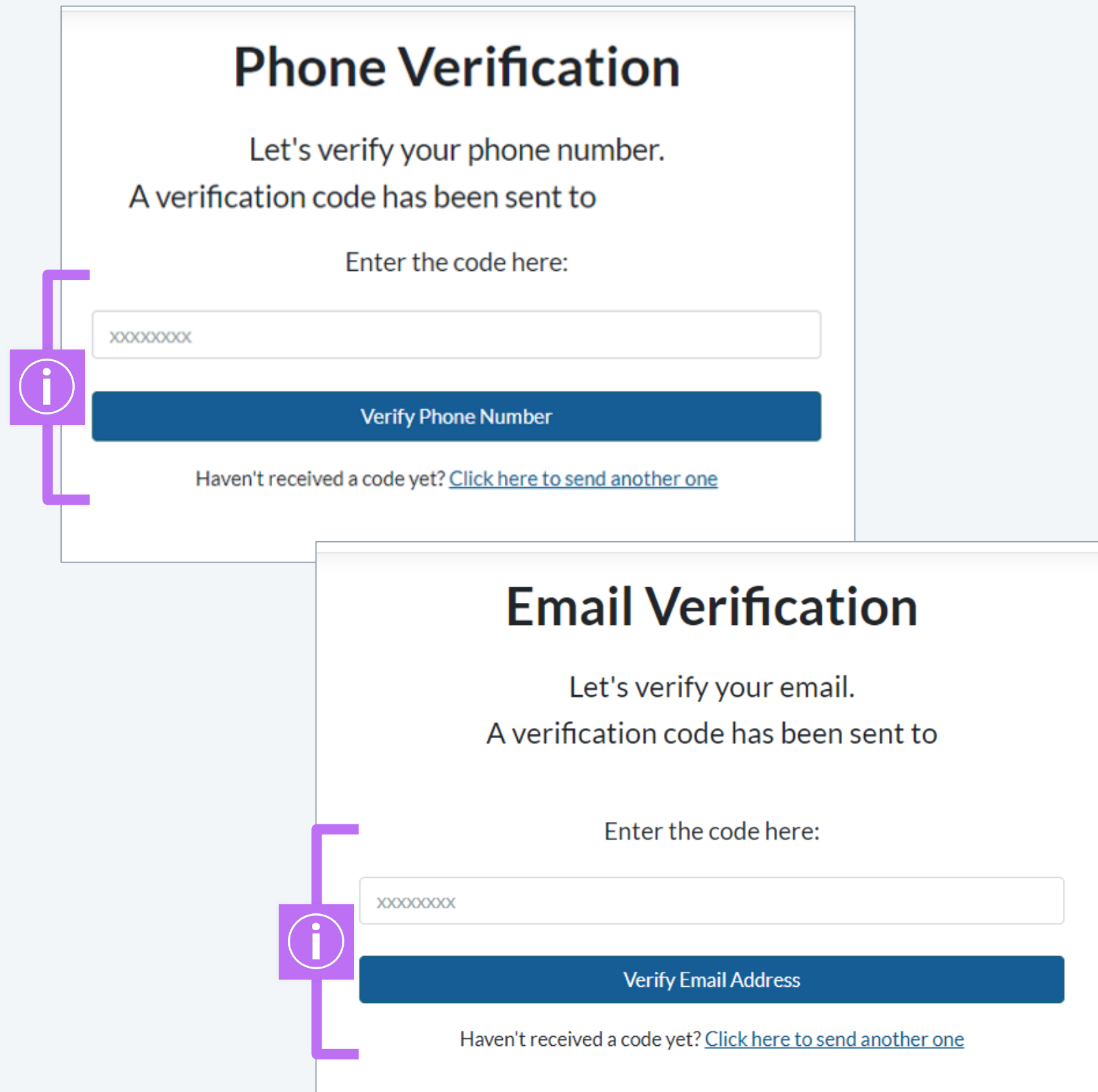
If logging into Agent Back Office for the first time, agents will be prompted to set up two-factor authentication.

To set up two-factor authentication:

- Enter an email address **OR** a phone number.
- Click on **Verify** to receive a verification code via email or text message.



Walkthrough setting up a list bill account



Phone Verification

Let's verify your phone number.
A verification code has been sent to

Enter the code here:

XXXXXXXX

Verify Phone Number

Haven't received a code yet? [Click here to send another one](#)

Email Verification

Let's verify your email.
A verification code has been sent to

Enter the code here:

XXXXXXXX

Verify Email Address

Haven't received a code yet? [Click here to send another one](#)

Upon receiving verification code:

- Enter code in area provided.
- Click on **Verify** to complete process and log in.

Note:

- Verification via email or text is required every time an agent logs in.



Walkthrough setting up a list bill account

- In Agent Back Office:
- Click on **List Bill** to begin setting up an account.



Back Office

Quote & Enroll

Dashboard

Agents

Customers

Policies

i

List Bill

Pended applications

Alerts

Payment past due 217822

PRIMARY7 NEWJERSEY7WHMDFPGODT

MEDICARE SUPPLEMENT INSURANCE

go to policy

PRIMARY7 NEWJERSEY7LWJCCPMXQN

MEDICARE SUPPLEMENT INSURANCE

go to policy

PRIMARY2 LOUISIANA2JEVTOQOHEA

ACCIDENT FIXED-BENEFIT PLAN (NHIC - INDIVIDUAL)

go to policy

PRIMARY2 LOUISIANA2JEVTOQOHEA

ACCIDENT MEDICAL EXPENSE

go to policy

217818 more policies are past due

[see all](#)

Terminating STM policies 3654

Guides

ABO User Guide

MyNatGen Member Portal User Guide

Agent List Bill Guide

Agent Sales Guide

Senior Product Agent Guide

Preferred/Standard Qualification Questions

Welcome

Welcome to the NEW Allstate Health Solutions Agent business and agent hierarchy across product lines. You have quick links to other agent tools. You also have direct access to the Allstate under 65 suite of products and ENG for the new low rates are available for you and your clients!

Great news!

Our new Medicare Supplement Charter, A new low rates are available for you and your clients!

Please note,

to view pending applications you may need to view the Allstate under 65 suite of products and ENG for the new low rates are available for you and your clients!

Don't forget!

Allstate offers a discount on Allstate dental products: Select Dental PPO, Select

Walkthrough setting up a list bill account

The screenshot displays the 'List Bill accounts' section of the Allstate Health Solutions portal. The 'Request new account' form is highlighted with a purple bracket and an information icon. The form fields are filled with the following data:

- Contact first name: John
- Contact last name: Dough
- Entity business name: Dough's Bakery
- Business email: john.dough@doughsbakery.com
- Business phone: (123) 456-7890

Below the form, a green button labeled 'send invitation' is visible. A confirmation message is displayed in a green box, stating: 'List Bill application request sent successfully! Click here to see application status.' Below this message is another green button labeled 'send invitation'.

B
B
PenTesting
Pen Tester
LBTest230323
Testing Inc

In **Request new account** section:

- Fill in required **employer** information.
- Click on **send invitation**.

Notification will appear once system has successfully sent application request.



Walkthrough setting up a list bill account

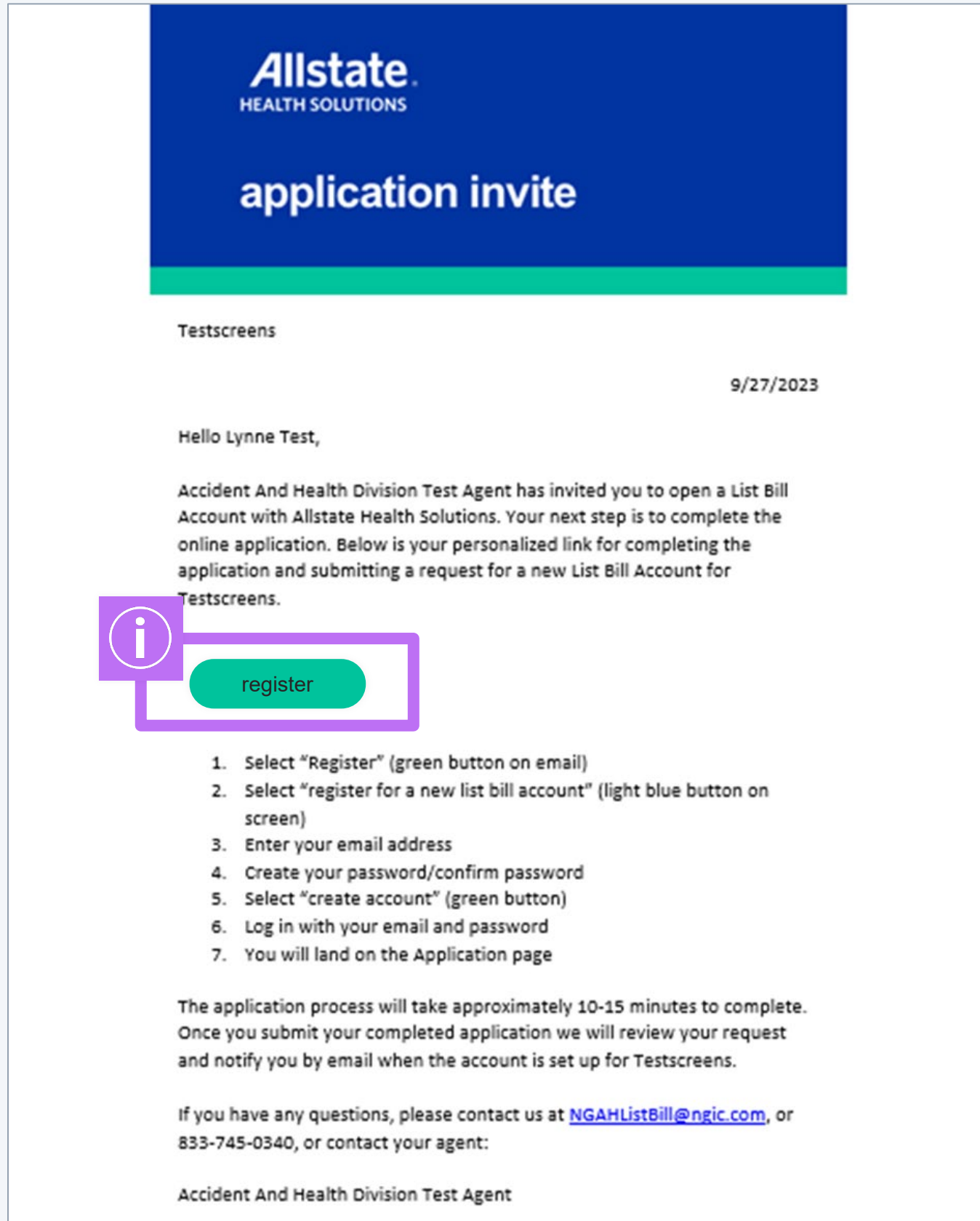
Once agent clicks on **send invitation**, system sends an email to list bill contact.

Contact must:

- Click on **register** and follow steps outlined in email to register a new account.
- Complete list bill application and submit for approval.

Note:

- If contact does not receive email within 30 minutes, they should check their Spam folder.



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application invite

Testscreens

9/27/2023

Hello Lynne Test,

Accident And Health Division Test Agent has invited you to open a List Bill Account with Allstate Health Solutions. Your next step is to complete the online application. Below is your personalized link for completing the application and submitting a request for a new List Bill Account for Testscreens.

i register

1. Select "Register" (green button on email)
2. Select "register for a new list bill account" (light blue button on screen)
3. Enter your email address
4. Create your password/confirm password
5. Select "create account" (green button)
6. Log in with your email and password
7. You will land on the Application page

The application process will take approximately 10-15 minutes to complete. Once you submit your completed application we will review your request and notify you by email when the account is set up for Testscreens.

If you have any questions, please contact us at NGAHLlistBill@ngic.com, or 833-745-0340, or contact your agent:

Accident And Health Division Test Agent



Walkthrough setting up a list bill account

Back Office Quote & Enroll Varied Marketers T Test

Policies List Bill Pended applications rewards

collapse form download

Business Name	Contact Name	Business Phone	Business Email	Status	CreateDate	Listbill Account #
TestwithJosh	Test, Josh	(414) 908-2122	lynne.devincenzo+0921@ngic.com	Approved	09/21/2023	720222
Test	Martinez, Julio	(111) 111-1111	Julio.Martinez@ngic.com	Invite Sent	09/01/2023	
Test Tuesday 2	Test, Lynne	(414) 908-2122	lynne.devincenzo+2308012@ngic.com	Approved	08/01/2023	707092
Test Tuesday 3	Test, Lynne	(414) 908-2122	lynne.devincenzo+2308013@ngic.com	Invite Sent	08/01/2023	
Test For Angie	Test, Angie	(414) 908-2122	angie.erste+230801@ngic.com	Invite Sent	08/01/2023	
Test for Angie 2	Test, Angie	(414) 908-2122	angie.erste+2308012@ngic.com	Approved	08/01/2023	707132
Business	User, Test	(414) 223-1223	Eric.Huth@ngic.com	Approved	07/24/2023	706089
B	User, Test	(414) 223-1223	eric.huth@ngic.com	Invite Sent	07/21/2023	
B	User, Test	(414) 223-1223	eric.huth@ngic.com	Invite Sent	07/21/2023	
B	User, Test	(414) 828-4855	eric.huth@ngic.com	Invite Sent	07/21/2023	
B	User, Test	(414) 828-4855	eric.huth@ngic.com	Invite Sent	07/21/2023	
B	User, Test	(414) 223-1223	eric.huth@ngic.com	In-review	07/21/2023	
PenTesting	Tester, Pen	(111) 111-1111	Eric.Huth@ngic.com	Invite Sent	04/26/2023	
Pen Tester	Testernonadmin, Pen	(222) 222-2222	Eric.Huth+0426PenTest3@ngic.com	Approved	04/26/2023	680732
LBTest230323	Lbtest, Jptest	(216) 123-4567	joshua.patton+230323@ngic.com	Approved	03/23/2023	674276
Testing Inc	Testerson, Jp	(216) 123-4567	joshua.patton+230118@ngic.com	Invite Sent	01/18/2023	
Employer CC	Name, Contact	(330) 978-5493	christopher.clarke@ngic.com	Invite Sent	01/05/2023	

To check the status of a list bill application:

- Locate the business name in account list.
- Status column displays application status:
 - Invite Sent, In-review, or Approved.

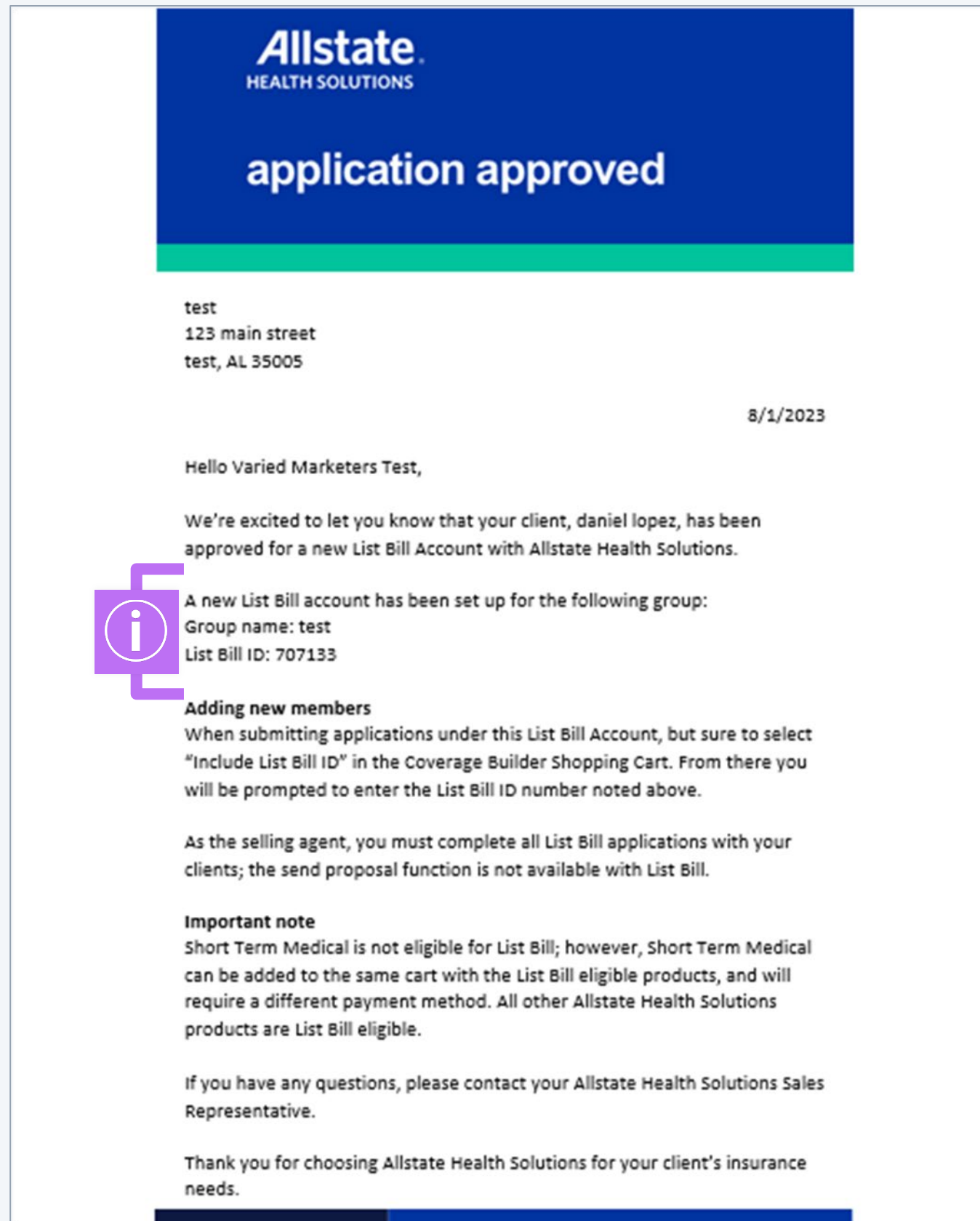


Walkthrough setting up a list bill account

Once list bill application is approved:

- List bill account number is generated.

Agent will receive an approval notification email containing list bill account number.



Enrolling a list bill member



Walkthrough enrolling a list bill member

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[quote & enroll](#) [back office](#)

[new quote](#) [applications](#) [proposals](#) [customer quoting links](#) [contact us](#) [forms, brochures & guides](#)

quick quote

primary applicant

Effective date ☒ Zip code ☒

10/01/2023 36104 Alabama

Date of birth ☒ Gender ☒

01/01/1978 45 years old ☐ female ☒ male

check to add additional applicants

☐ Spouse/domestic partner ☐ Dependents (children)

quote now

2 Declined **176** Policy Issued **19** Pending Review **3** Pending Voice Signature

In the e-app portal:

- Enter a few key pieces of information.
- Click on **quote now** to begin.



Walkthrough enrolling a list bill member

Enter member's information in required fields.

- **Note:** List bill requires agents to select the 1st of month as the effective date.

Click on **quote now** to continue to plan selection.

tell us more about each applicant

10/01/2023 AL, 36104 2 applicants

Effective date ✓ 10/01/2023 Zip code ✓ 36104 Alabama

Applicants 2 Dependents 0

Applicant 1

First name ✓ John Last name ✓ Dough

Date of birth ✓ 01/01/1978 45 years old Gender ☐ female ☒ male

Applicant 2 (Spouse/domestic partner)

First name ✓ Mary Last name ✓ Dough

Date of birth ✓ 02/02/1989 34 years old Gender ☒ female ☐ male

add dependent

quote now



Walkthrough enrolling a list bill member

Select the type of plan from column on left side of screen.

- Click on **add** to select a plan and add it to cart.

< exit quote

quote seniorquote individual

10/01/2023
AL, 36104

John Dough
45 y/o

Mary Dough
34 y/o

edit

Short Term Medical

Dental

Fixed-benefit Indemnity

Accident

Term Life

Cancer and Heart/Stroke

Term Life - Critical Illness

My LIFE Wellness

Who is this policy for?

☒ John Dough☒ Mary Dough

check provider network

Select Dental

Save up to 15%

download brochure

- Optional vision coverage available - **add a core plan to see available vision coverage options**
- No waiting periods (exceptions for major services in copay plan)
- Coinsurance plans pay more after year one; maximums increase in year two and three
- Child only plans available
- Prime plan covers orthodontic care, others do not
- A copay is assessed for dental care visits. For preventive services, the copay is applied per visit. For basic and major services, the copay is applied per procedure
- If you go in-network, the plan pays the negotiated rate, with no additional cost to you
- If you go out-of-network, the plan pays the maximum allowable amount. You pay the copay and remaining balance
- See brochure for limitations and exclusions

Plan Name	Annual Benefit	Deductible	Basic	Major	Premium	
Copay Plan 2	Unlimited	N/A	\$100	Tier 1: \$125, \$75, Tier 2: \$500, \$350	\$84.53	add
Copay	\$3,000	N/A	\$50	\$50, \$250	\$81.89	add
Prime	\$2,000	\$50/Ind \$150/Family	60%	25%	\$77.91	add
Plus	\$1,000	\$50/Ind \$150/Family	60%	15%	\$58.13	add
Value	\$1,000	\$50/Ind \$150/Family	60%	N/A	\$35.86	add



Walkthrough enrolling a list bill member

In the cart:

- Check box next to **list bill**.
- Click on **apply** to begin application process.

The screenshot shows a healthcare plan selection interface. At the top, a dark blue header displays the 'Monthly payment total' as '\$78.13' in green. Below this, a section titled 'Select Dental' with a close icon (X) shows the plan 'Plus + Vision L1' for '\$78.13/mo' and lists 'John Dough, Mary Dough' as members. A green 'apply' button is highlighted with a purple box and an information icon (i). Below the 'apply' button is a 'create proposal' button. Underneath that, a 'list bill' option is shown with a checked checkbox, also highlighted with a purple box and an information icon (i). At the bottom, a dark blue section titled 'Discounts related to your cart' offers to 'Save up to 40% on Hospital Expense' and includes a 'see plans' button. On the left side of the interface, there are several buttons: 'd brochure', 'ons', 'visit. For basic', 'and remaining', and two 'switch' buttons at the bottom.



Walkthrough enrolling a list bill member

The screenshot shows the Allstate Health Solutions interface. On the left, a sidebar lists 'Select Dental', 'John Dough', 'Mary Dough', 'Billing' (selected), and 'Plan and signing'. Below this is a 'save draft & exit' button and a 'last saved 13:33' timestamp. The main content area is titled 'Billing' and includes a 'Payment frequency' dropdown set to 'Monthly'. Below this is a message: 'The payment and billing for this product will be handled through your account owner.' and a prompt: 'Please add a payment method to your application'. A dropdown menu is open, showing 'List Bill' as the selected option. A purple box highlights the 'add' button below the dropdown. An information icon (i) is next to the 'add' button. A modal window titled 'Add list bill details' is open, showing a 'List bill number' input field and 'cancel' and 'apply' buttons. A purple box highlights the 'apply' button, and an information icon (i) is next to it. At the bottom of the main content area is a 'continue to plan and signing' button with a right arrow. The footer contains a 'Privacy policy' link, a disclaimer about Allstate Health Solutions being a marketing name for products underwritten by National Health Insurance Company, Integon National Insurance Company, Integon Indemnity Corporation and American Heritage Life Insurance Company, and a copyright notice for 2023 Allstate Insurance Company with links to www.allstate.com and allstatehealth.com.

Fill out each required section of application.

- Application sections may vary slightly depending plan(s).

In the billing section:

- Click on **add** to open list bill tool.
 - Enter list bill number in area provides.
 - Click on **apply**.
- Click on **continue** to finish application.



Managing list bill accounts



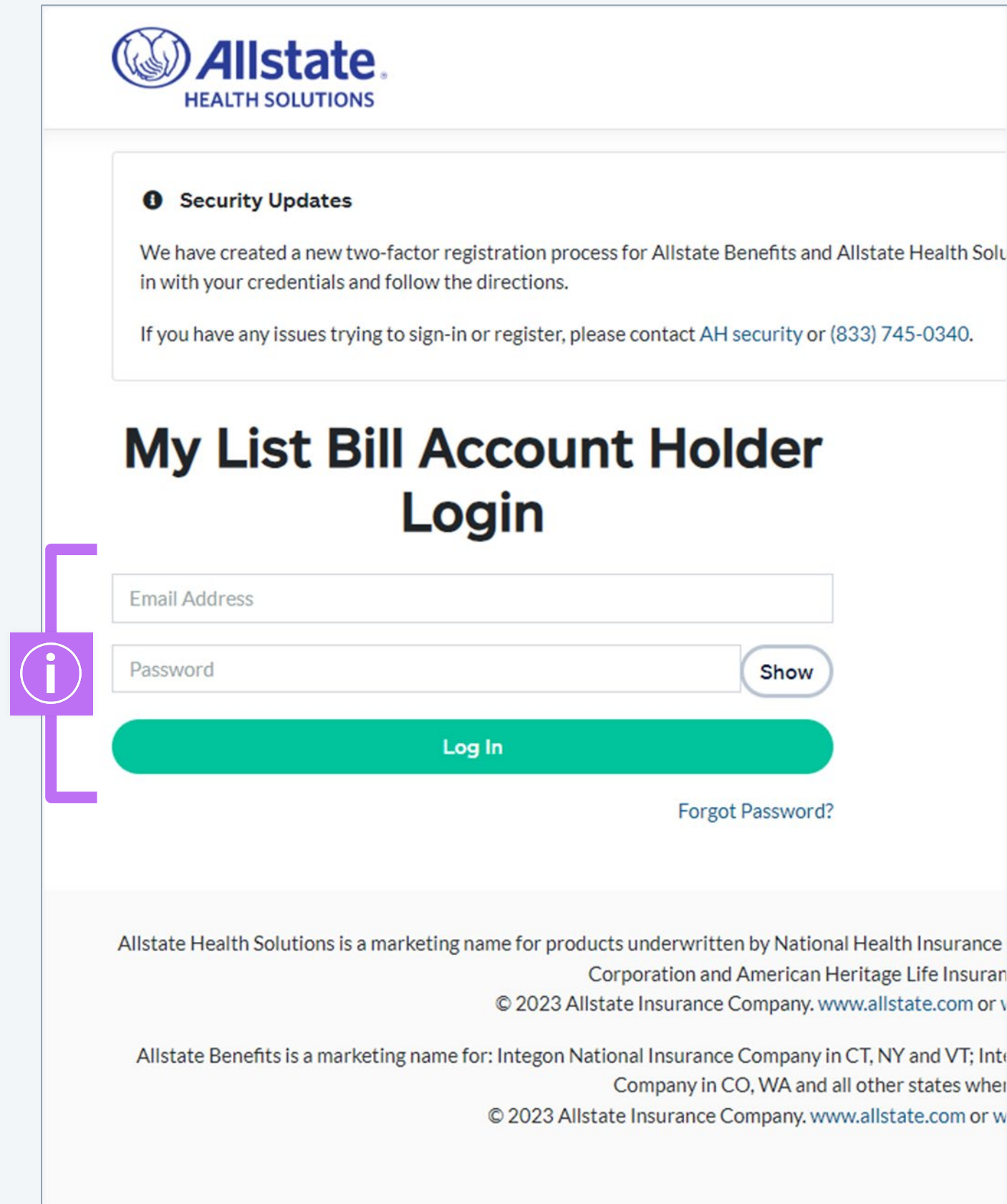
Walkthrough managing list bill accounts

Log in to List Bill Account Holder portal using the following link:

- <https://listbill.myallstatehealthsolutions.com>

In portal, agents and list bill account owners can:

- Update or enter banking/credit card info.
- View payment history and monthly invoices.
- Check current monthly payment status.
- View list of members, their selected insurance products, and monthly premiums.
- View/download list bill account agreement.



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Security Updates

We have created a new two-factor registration process for Allstate Benefits and Allstate Health Solutions. Please log in with your credentials and follow the directions.

If you have any issues trying to sign-in or register, please contact AH security or (833) 745-0340.

My List Bill Account Holder Login

Email Address

Password Show

Log In

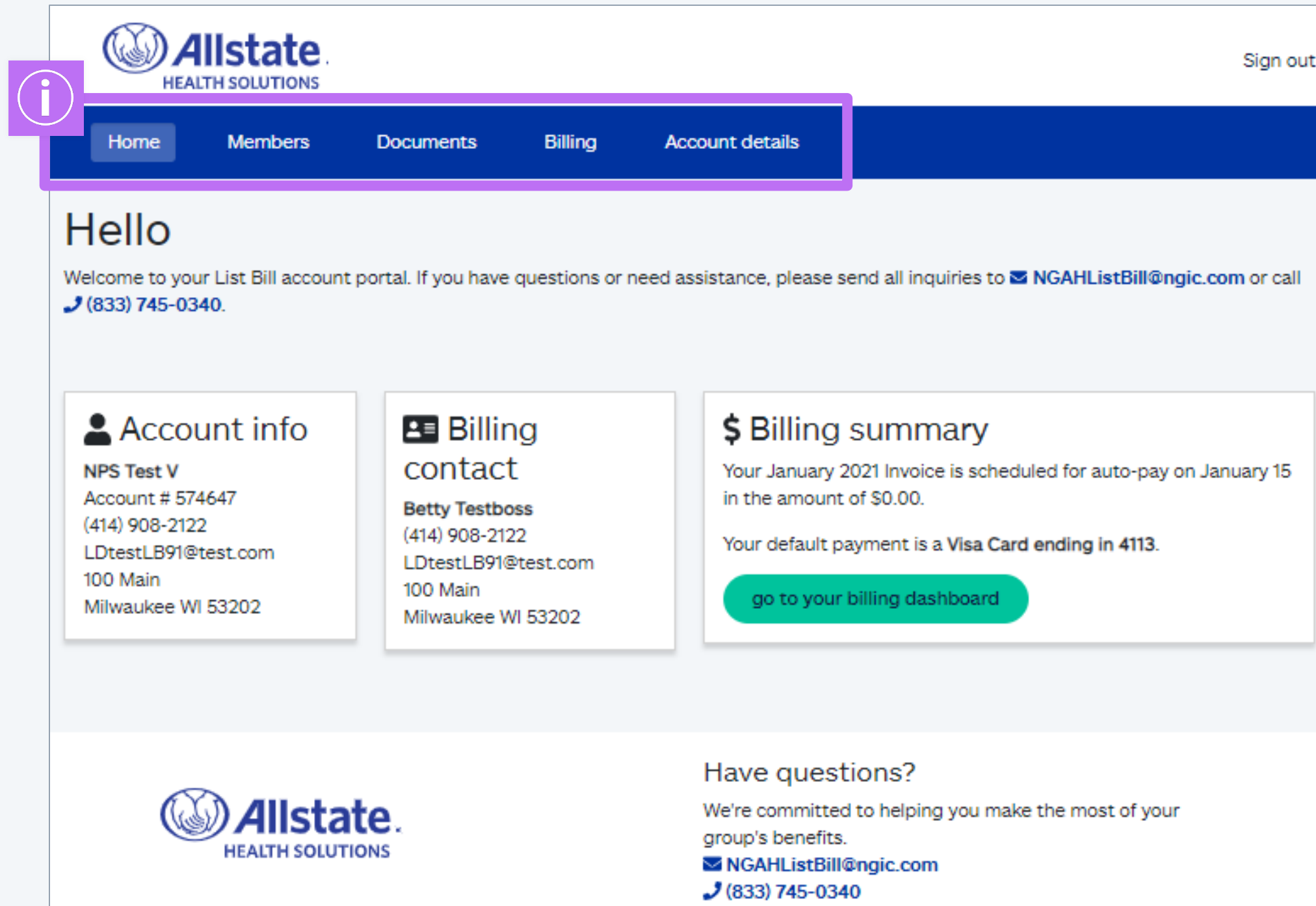
[Forgot Password?](#)

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Allstate Benefits is a marketing name for: Integon National Insurance Company in CT, NY and VT; Integon Insurance Company in CO, WA and all other states where licensed.
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Walkthrough managing list bill accounts



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Sign out

Home Members Documents Billing Account details

Hello

Welcome to your List Bill account portal. If you have questions or need assistance, please send all inquiries to NGAHLListBill@ngic.com or call (833) 745-0340.

Account info

NPS Test V
Account # 574647
(414) 908-2122
LDtestLB91@test.com
100 Main
Milwaukee WI 53202

Billing contact

Betty Testboss
(414) 908-2122
LDtestLB91@test.com
100 Main
Milwaukee WI 53202

\$ Billing summary

Your January 2021 Invoice is scheduled for auto-pay on January 15 in the amount of \$0.00.

Your default payment is a Visa Card ending in 4113.

[go to your billing dashboard](#)

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Have questions?
We're committed to helping you make the most of your group's benefits.
NGAHLListBill@ngic.com
(833) 745-0340

After logging into portal:

- The home page displays the account overview.

Use the navigation menu bar at the top of the home page to access account details.



Walkthrough managing list bill accounts



Health Solutions

Sign out

Home

Members

Documents

Billing

Account details

Members

Below you'll find a listing of all Members and their policies under your List Bill Account. You can search for specific Members in the search box, and sort the results by clicking on column headers.

export to excel

Search

Policy Number	Member Name	Enroller Id	Partner Application ID	Product Name	Benefit Level	Enrollment Fee	Premium Amount	Effective Date	Inactive Date	Is Detached
2008077354	ONE, MARIAH	159208		ACCIDENT FIXED-BENEFIT PLAN (NHIC - INDIVIDUAL)	AFB - 24 HOUR (LEVEL 2)	\$0.00	\$25.73	8/1/2020	Active	✓
2008077355	ONE, MARIAH	159208		DENTAL PPO	ESSENTIALS	\$0.00	\$22.59	8/1/2020	Active	✓
2008077356	ONE, MARIAH	159208		LIFE ASSOCIATION MEMBERSHIP - A		\$0.00	\$4.10	8/1/2020	Active	✓
2008077390	TWO, DOMINICK	159208		ACCIDENT FIXED-BENEFIT PLAN (NHIC - INDIVIDUAL)	AFB - 24 HOUR (LEVEL 2)	\$0.00	\$85.53	9/1/2020	Active	

Click on **Members** to view:

- Member list.
- Products, benefit levels, and coverage dates.
- Active and “detached” members.

Note:

- Account owners should review list of active members monthly.
- To remove a member, account owners must call or email:
 - (833) 745-0340
 - NGAHListBill@ngic.com



Walkthrough managing list bill accounts

Sign out



Home

Members

Documents

Billing

Account details

Documents

Below you'll find a listing of Documents related to your List Bill Account, including your original application, correspondence, and other items. You can search for specific Documents in the search box, and sort the results by clicking on column headers.

Show 10 entries

Search

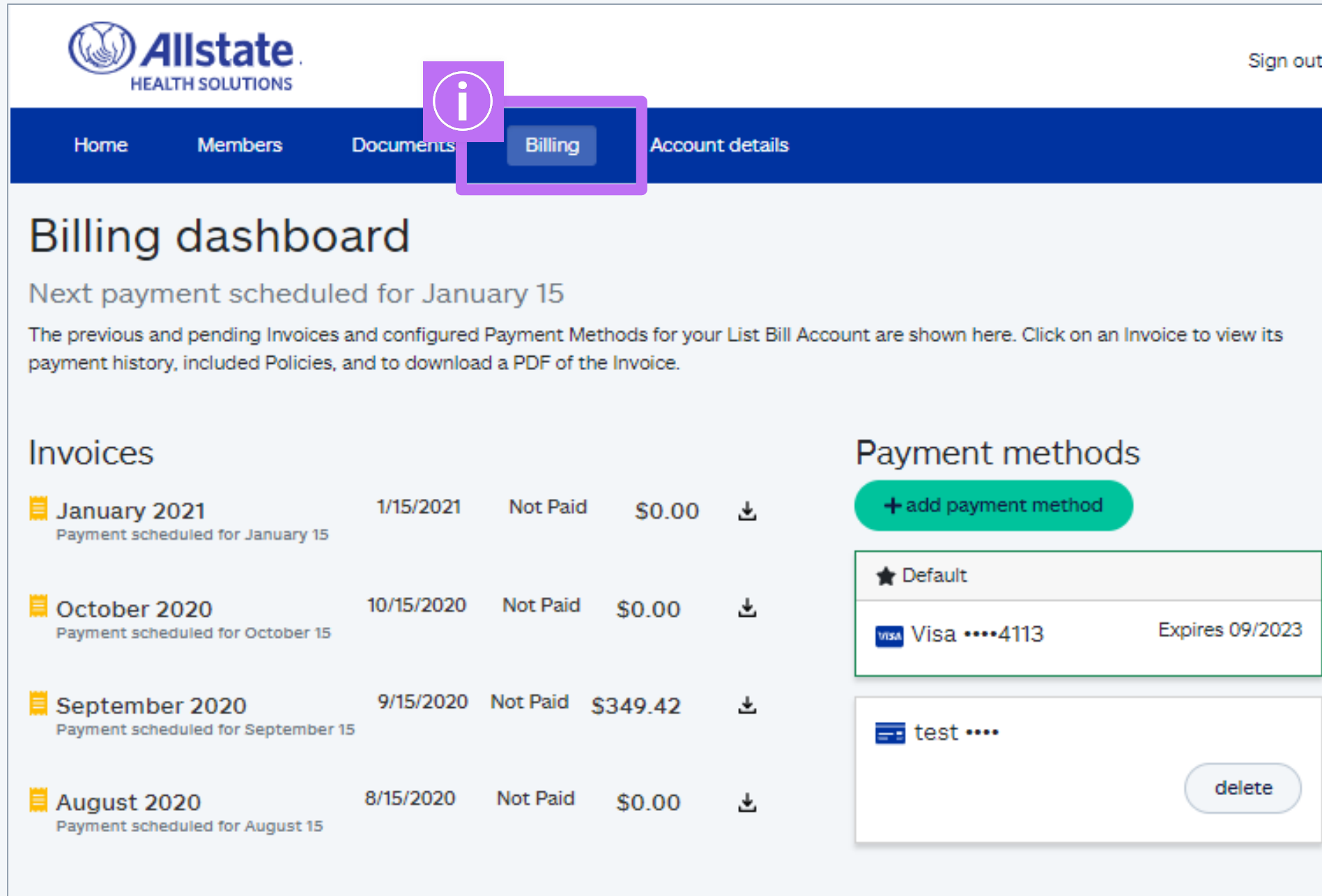
Document type	Description	Created date	Download
Communication	New User Invitation -- (Email testing override for Lynne.devincenzo+0831@ngic.com)	8/31/2023	
Communication	New User Invitation -- (Email testing override for lynne.devincenzo@ngic.com)	2/4/2021	
Communication	Your new List Bill Account request -- (Email testing override for ASKFORSARAH@YAHOO.COM)	9/1/2020	
Communication	Welcome to National General -- (Email testing override for LDtestLB91@test.com)	9/1/2020	
Contract	List Bill Account Application - 574647	9/1/2020	

Click on **Documents** to download and print:

- Original application.
- Welcome letter.
- Account agreement.
- Other account-related communications.



Walkthrough managing list bill accounts



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Sign out

Home Members Documents **Billing** Account details

Billing dashboard

Next payment scheduled for January 15

The previous and pending Invoices and configured Payment Methods for your List Bill Account are shown here. Click on an Invoice to view its payment history, included Policies, and to download a PDF of the Invoice.

Invoices

January 2021 Payment scheduled for January 15	1/15/2021	Not Paid	\$0.00	
October 2020 Payment scheduled for October 15	10/15/2020	Not Paid	\$0.00	
September 2020 Payment scheduled for September 15	9/15/2020	Not Paid	\$349.42	
August 2020 Payment scheduled for August 15	8/15/2020	Not Paid	\$0.00	

Payment methods

[+ add payment method](#)

★ Default

Visa ****4113 Expires 09/2023

test ****

[delete](#)

Click on **Billing** to:

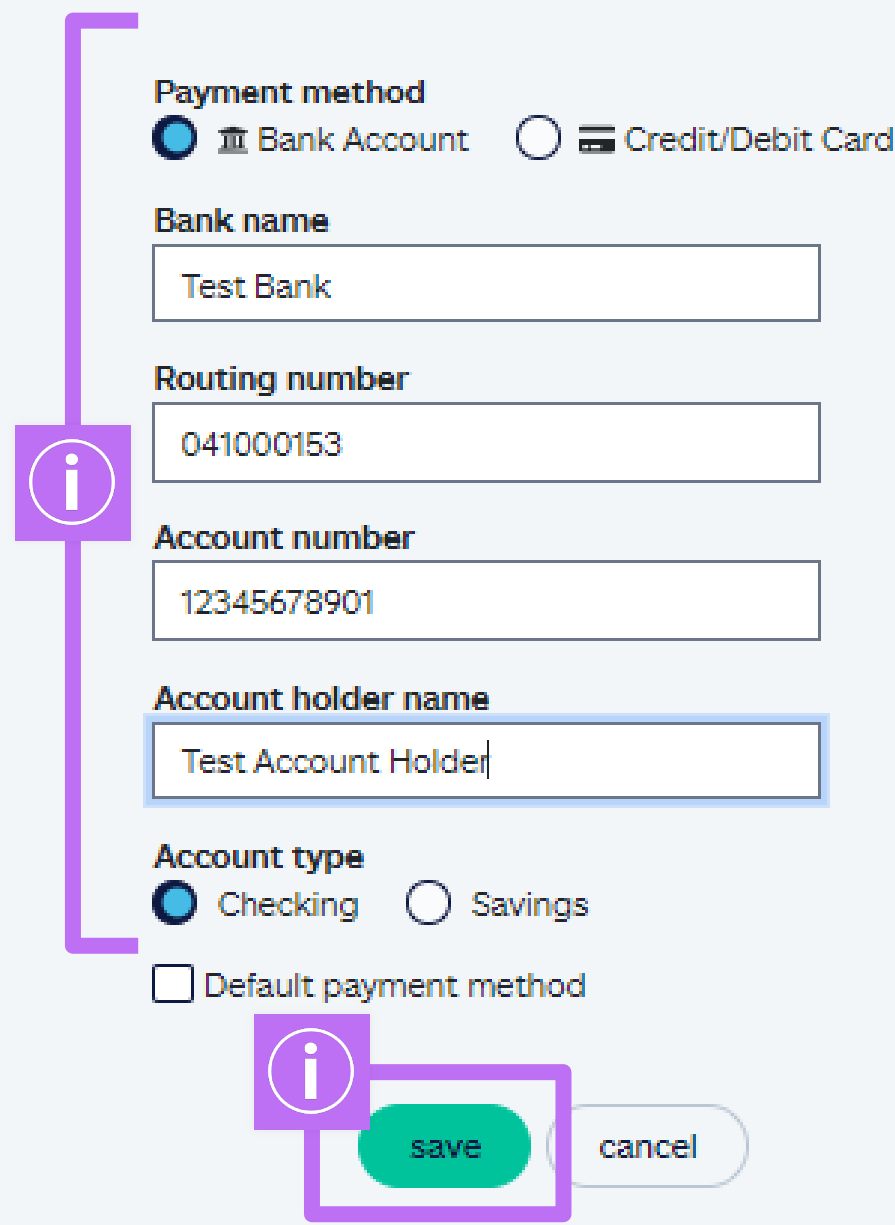
- Access billing dashboard.
- Download and print account invoices.
- Add and change/update payment method.



Walkthrough managing list bill accounts

Add payment method

You can add a new Payment Method to replace your current Payment Method by using the form below. Your information is securely encrypted throughout the entire process.



Payment method
☒ Bank Account ☐ Credit/Debit Card

Bank name
Test Bank

Routing number
041000153

Account number
12345678901

Account holder name
Test Account Holder

Account type
☒ Checking ☐ Savings

☐ Default payment method

save **cancel**

To add/update payment method:

- Click on **add payment method**.
 - Select type of payment method.
 - Enter all required information.
 - Click on **save** to continue.

Note:

- List bill payments are collected via a monthly ACH draft.
- Drafts occur about 5 days after the monthly invoice is sent.
- Any changes to account must be made before draft date.



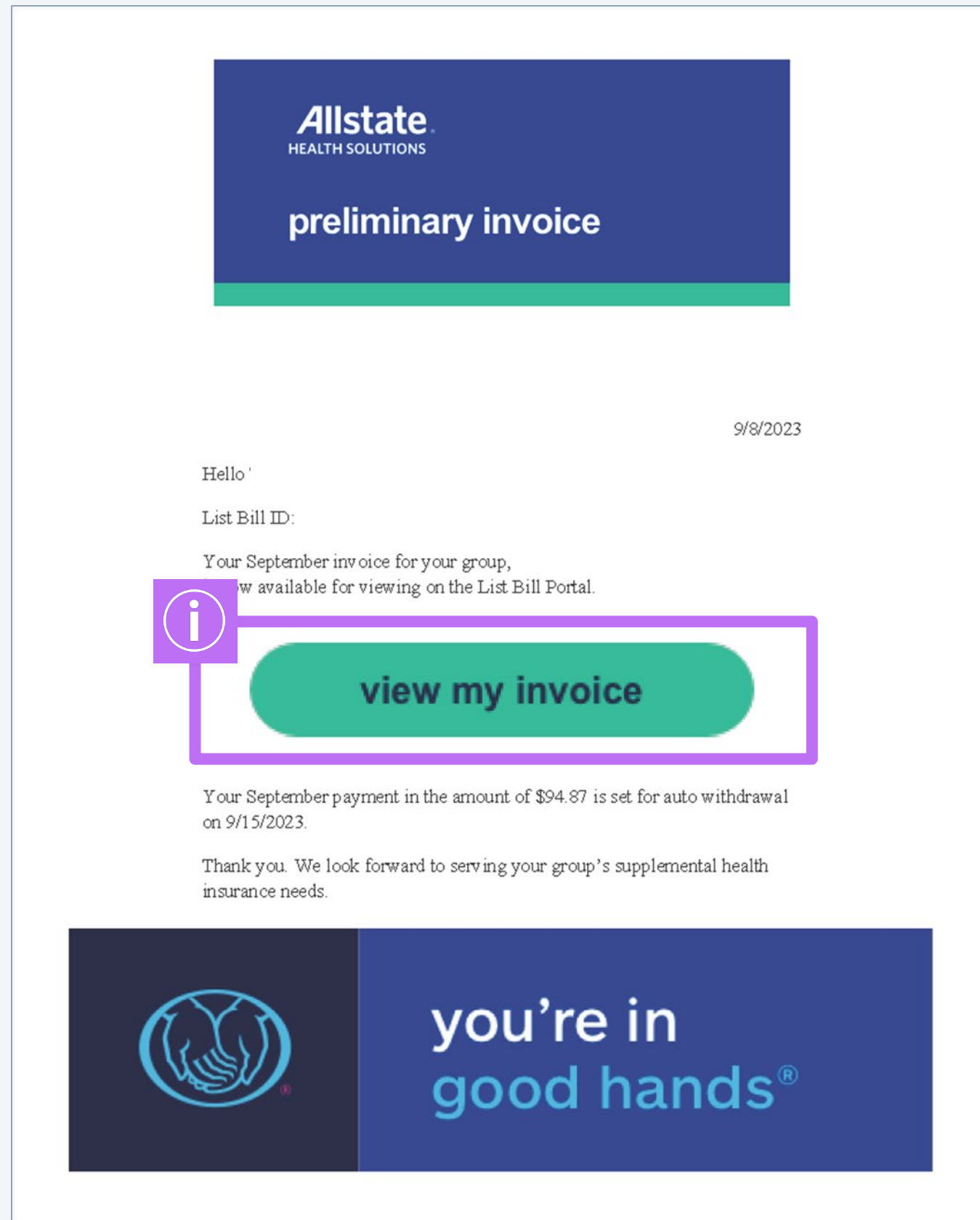
Walkthrough managing list bill accounts

Account invoices are sent on the 10th of each month.

- Account owners are notified via email when monthly invoice is available.

After viewing an invoice:

- If account owners need to make any changes, they must call or email:
 - (833) 745-0340
 - NGAHListBill@ngic.com



Walkthrough managing list bill accounts

- When viewing an invoice, page 1:
- Indicates if the invoice is preliminary or final.
 - Summarizes products and pricing information.
 - Provides the invoice total and draft date information.



i

Preliminary Invoice

List Bill ID:
Invoice #:
Billing Period: 8/10/2023 to 9/9/2023
Bill Date: September 19, 2023

Monthly statement

Summary

Bill Period: 8/10/2023 to 9/9/2023

Number of Customers: 10
Number of Products: 1
Invoice Amount: \$94.87

Total Due
\$94.87
Draft Date: 9/15/2023

i

This is a statement of your account, please review carefully.

- If you need to make changes, please contact us at 833-745-0340 or email NGAHLlistBill@ngic.com.
- In order to adjust this invoice changes must be submitted by the 14th of the month.

Product Summary

Products	Subscribers	Amount
PLAN ENHANCER - ACCIDENT & HEALTH	10	\$94.87



Walkthrough managing list bill accounts



Preliminary Invoice

List Bill ID
Invoice #:
Billing Period: 8/10/2023 to 9/9/2023
Bill Date: September 19, 2023

Customer Product Information

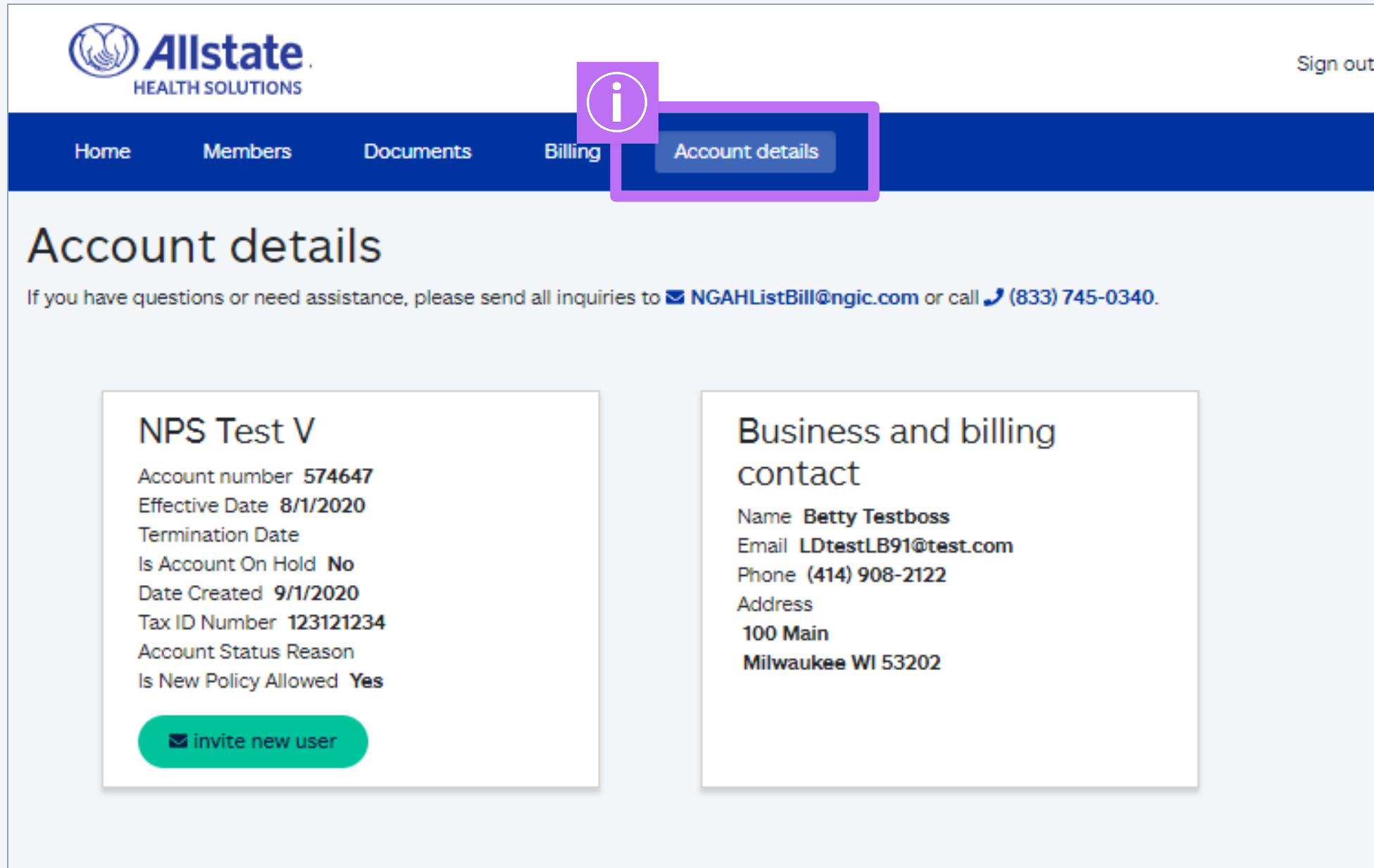
Member	Product	Benefit Level	Billing Coverage Period	Amount
	PLAN ENHANCER - ACCIDENT & HEALTH	AME 5,000	9/1/2023 to 9/30/2023	\$6.80
	PLAN ENHANCER - ACCIDENT & HEALTH	AME & SIP 2,500	9/1/2023 to 9/30/2023	\$9.98
	PLAN ENHANCER - ACCIDENT & HEALTH	AME & SIP 2,500	9/1/2023 to 9/30/2023	\$9.98
	PLAN ENHANCER - ACCIDENT & HEALTH	AME & SIP 2,500	9/1/2023 to 9/30/2023	\$9.98
	PLAN ENHANCER - ACCIDENT & HEALTH	AME 5,000	9/1/2023 to 9/30/2023	\$6.80
	PLAN ENHANCER - ACCIDENT & HEALTH	AME & SIP 2,500	9/1/2023 to 9/30/2023	\$17.77
	PLAN ENHANCER - ACCIDENT & HEALTH	AME & SIP 2,500	9/1/2023 to 9/30/2023	\$9.98
	PLAN ENHANCER - ACCIDENT & HEALTH	AME 5,000	9/1/2023 to 9/30/2023	\$6.80
	PLAN ENHANCER - ACCIDENT & HEALTH	AME 5,000	9/1/2023 to 9/30/2023	\$6.80
	PLAN ENHANCER - ACCIDENT & HEALTH	AME & SIP 2,500	9/1/2023 to 9/30/2023	\$9.98
Total				\$94.87



- When viewing an invoice, page 2:
- Shows any invoice adjustments.
 - Provides member, product, and benefit level information.
 - Shows billing coverage period, i.e. the dates for which the invoice is paying.
 - Provides total amount billed.



Walkthrough managing list bill accounts



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Sign out

Home Members Documents Billing **Account details**

Account details

If you have questions or need assistance, please send all inquiries to ✉ NGAHLListBill@ngic.com or call 📞 (833) 745-0340.

NPS Test V

Account number **574647**
Effective Date **8/1/2020**
Termination Date
Is Account On Hold **No**
Date Created **9/1/2020**
Tax ID Number **123121234**
Account Status Reason
Is New Policy Allowed **Yes**

✉ invite new user

Business and billing contact

Name **Betty Testboss**
Email **LDtestLB91@test.com**
Phone **(414) 908-2122**
Address
100 Main
Milwaukee WI 53202

- Click on **Account details** to:
- Access account information.
 - View business and billing contact information.
 - Set up portal access for a new list bill account user.



Questions?

Email:

NGAHTraining@NGIC.com

