

XGB SOP\TIMELINE FOF MARPAI

OUR SYSTEM = YOUR SUCCESS

FOLLOW THE PROCESS. HIT THE DEADLINE. GET PAID.



01

GET SET UP
(DO THIS FIRST)

- Get your XGB affiliate site set up - it may take 24/48 hrs to gain access - your upline will need to invite you.
- <https://portal.everon.tech> - XGB affiliate site

TIP:

Do this before your first presentation.

02

PRESENT TO OWNER/ DECISION MAKER

- Make sure you refresh to ensure you have the most up-to-date proposal with supps and use to present.

RULE:

Never present outdated numbers.

03

ONCE YOU HAVE CONTRIBUTION AND ARE READY TO MOVE FORWARD

1. Log in to your XGB portal.
2. Then create a contact, hit next, and fill out company info
3. You will send an invite to the employer (whoever is in charge of the benefits) to complete the application
4. The employer adds the employees manually on the employer application or uploads the census file.
5. When the employer submits the application, the employee applications are triggered.
6. All forms will be sent electronically via the platform

Everything is completed electronically on the platform.

04

CRITICAL DEADLINE

ALL FORMS MUST BE SUBMITTED NO LATER THAN THE 15TH OF THE MONTH

- ✓ Employer Forms
- ✓ Employee Enrollments



FOR A 1ST OF NEXT MONTH EFFECTIVE DATE

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05

**POST
SUBMISSION
(SEE
EXPECTATIONS)**

- Between the 15th and the first week of the next month, please allow time for the processing and group implementation.

You can track everything online in your portal.

06

**CLIENT
RECEIVES
(1ST WEEK)**

SOMETIME AROUND THE 1ST WEEK OF THE MONTH THE GROUP APPOINTED CONTACT WILL RECEIVE:

NSA Agreement

If Cigna was the chosen network) from DSE-NSA2@docusign.net
Subject: Company name-contract for e-sign

Panda Doc
from Marpai

Cards to be approved
from Marpai

Lively Set-up

(from Lively - must set up to gain access)

Invoicing emailed
by the 15th of the month

- ✓ Once these are approved (they must email back to approve or make changes) please allow 7-10 biz days for physical cards to be received.

07

**FINAL NOTES
& SUPPORT**

- If the client has questions about medical coverage once group is installed - have them call Marpai customer support 844-276-3737