HUBLINK NAVIGATION - QUICK REFERENCE GUIDE

1. LOGIN:

Go to www.cbsinc.ca
Click "planner login"
Input user name and password

2. ADMINISTRATION:

At top left blue bar, click "My Office"
Next, click "My Insurance Office"
This brings you to the main DESKTOP screen for administration services

Unless you are a HUB Capital MFDA Rep, please ignore "My Investment Office"

3. CHECKING PENDING BUSINESS:

From top bar, click VIEW then POLICIES from the drop down.
You now have a search engine with parameters at the top of your screen.

You can pull up or search for an individual policy by policy number or client name then click on the magnifying glass on the far right.

To go back to a previous screen, DO NOT use the back arrows of your internet browser. Always use the BACK button within HUBLINK.

4. PULL UP ALL POLICIES IN MILL:

From the search engine, click the dropdown menu in the OTHER box. Select, IN THE MILL, then click the magnifying glass. A listing of all policies pending will appear. If more than 10, look at top right of the screen and it will tell you how many pages you have. Simply click the arrow to scroll through pages.

To go into detail on a case, click the far left bubble to select then click on one of four options above in the menu:

DETAIL – this brings you to the plan detail screen showing policy number, coverage. Plan type, premium, etc.

REQ – this brings you to a listing of all requirements ordered and status.

NOTE – this is where the notes from your case manager regarding the history of the file will be found. Anytime you see a BLUE push pin, it lets you know there is a note that you haven't read. Once you click on it, it turns gold so you know it has been handled.

Notes can also be found at the policy level when you've searched for all "In the Mill" for instance.

DOCUMENTS- Here you will find the scanned copy of the application, illustration, settling requirements or any other pertinent documents that have been scanned by our central operation. Click to select then click DOWNLOAD to open and view.

5. ALTERNATIVE SEARCH METHODS:

From the search engine, you can also click on STATUS, then from the dropdown review your business by Underwriting Pending, Issued, Approved, Inforce Commission Outstanding or Inforce Commission Paid. In addition, you can search for Declines, NPW etc. for new marketing opportunities.

6. REPORTING:

This area is accessed by clicking VIEW, then from the dropdown clicking REPORTS

Available Reports:

Broker Compenstation Report: Lists all commissions, both FYC and bonus generated for a selected period.

Client Birthday Report: Allows you to see all client birthdays coming up in a selected period.

In the Mill Report: A listing of all cases currently in the mill with status.

Placed Report: All placed policies with client, premium, plan type and FYC for a given period with totals.

Policy Anniversary Report: All policy anniversaries that come up in a given period.

Written Report: All written policies with client, premium, plan type and FYC for a given period.

7. RUNNING THE REPORTS:

Click the report you want then click the SELECT button at top.
Next, select your date parameters and report criteria ie by carrier or by detail, meaning all details of each case in the report.
Finally, click PRINT this will display on screen a PDF of the report which can then be actually printed.
If you click VIEW, the data can be exported to Excel to create your own reports.

8. CONTRACTS and LICENSING:

From main DESKTOP screen, click PROCESS, then from dropdown click LICENSE.

This will give you all of your current contracts both active and inactive as well as access to scanned copies of all your licenses and E and O cert.

The NOTE bubble above the contracts will give you all case manager notes regarding detail on pending contracts.

To access PDF copies of licenses and E and O, click DOCUMENTS on the top tab section. Then select the one you wish, click DOWNLOAD and your PDF will appear. Print as required.

9. ORDERING SUPPLIES OR ACCESSING ON LINE FORMS:

From the top menu at DESKTOP, click TOOLS then SUPPLY CATALOGUE to access PDF forms from carriers or ORDER SUPPLIES to request forms to be couriered to you from our central operation.

10. CHANGING PASSWORD:

To change your password and email address:

Click "Your Name" which appears on the top right of the main screen. To update your email address, input your new address and click UPDATE.

To change your password, click MANAGE PASSWORD, input your new password and click UPDATE.

11. MARKETING:

Once logged onto HUBLINK, click BROKER RESOURCES on left side blue bar.

Select desired item:

Calculators: a selection of LifeGuide mathematical calculators that are internet based.

Templated Client Letters: a selection of prospecting letters for clients.

Quotations: a simplified quoting engine for Term and CI, single life only with needs analysis.

Software: Download or order the current version of all carrier software.

Underwriting Guides and Charts: an internet underwriting guide for impairments as well as all carrier underwriting guides and build charts.

Commission Schedules and Cheat Sheet: All carrier commission schedules from the broker contracts as well as a HUB admin guide on who pays when and how?

Should you have any administrative navigation questions, please contact your CBS/HUB case manager.