



**BEAM IMPLEMENTATION TOOL
BROKER RESOURCE**



01

WHAT IS THE IMPLEMENTATION TOOL?



Beam Implementation Overview

What is the implementation tool?

- The implementation tool is how Beam captures **important, group-specific information** for the group applications
- Broker & group admin signatures are captured in the implementation tool
- Group payment information (ACH) is captured in the tool

Beam Implementation Overview

What kind of information do I need to know before using the tool?

- Brokers are responsible for adding the following group information to the tool:
 - Name & contact of group contact *who is signing the application*
 - Physical & billing addresses of the group
 - HR admin & billing contacts for the group
 - Waiting period for lines of coverage
- If this group has any Nationwide lines of coverage, additional details are required:
 - Broker's Nationwide Producer Number (if assigned)
 - Employer Tax ID
 - Business Start Date
 - Description of Nature of Business

02

PREVIEW OF BEAM'S IMPLEMENTATION TOOL



Beam Implementation Overview

What can I expect the tool to look like?

- Please use the following screenshots as reference to what you and your group will see in the implementation tool

Beam Implementation Overview

Typical Broker Flow

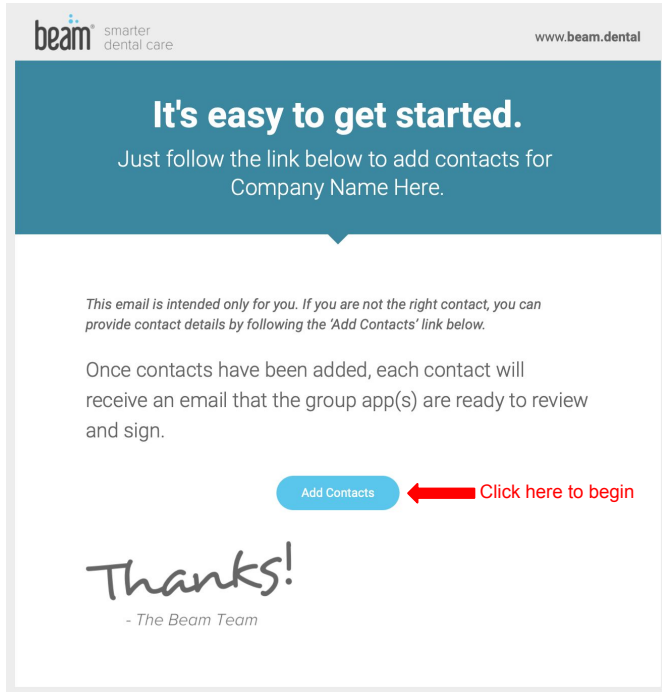
- You as the broker will be adding in group information & signing all at once
- The group will then review information, sign the application, and add payment information

Beam Implementation Overview

Check your email to start the tool

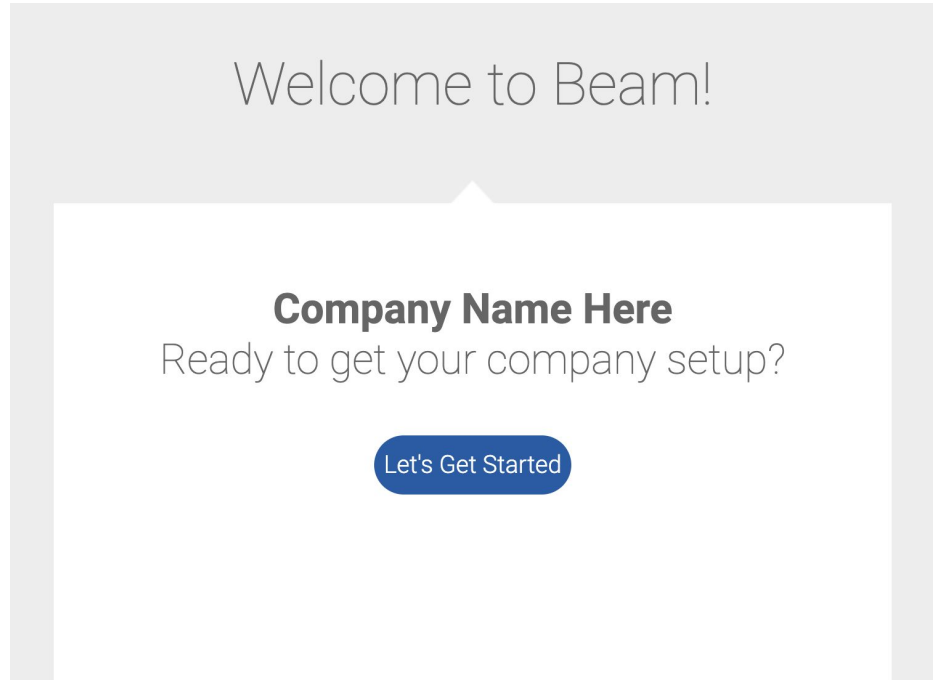
Beam Dental
broker@example.com

Almost there! Please add contacts for Company
Name Here



The screenshot shows an email interface with the following content:

- Header: **beam** smarter dental care | www.beam.dental
- Section: **It's easy to get started.**
Just follow the link below to add contacts for Company Name Here.
- Text: *This email is intended only for you. If you are not the right contact, you can provide contact details by following the 'Add Contacts' link below.*
- Text: Once contacts have been added, each contact will receive an email that the group app(s) are ready to review and sign.
- Button: **Add Contacts** (with a red arrow pointing to it and the text "Click here to begin")
- Text: **Thanks!**
- The Beam Team



The mockup shows a light gray background with a white central area containing the following text:

- Header: Welcome to Beam!
- Section: **Company Name Here**
- Text: Ready to get your company setup?
- Button: **Let's Get Started**





Beam Implementation Overview

Enter your information

Let's get some details.

Will you be one of the two signers of the application?

YES NO

 Back  Next

Let's get some details.

Great, we just need some information.

First Name
Your _____

Last Name
Name _____

Email
broker@example.com _____



Which of the following best describes you?

Employer Representative

Agent Representative

Nationwide Producer Number (if assigned)
123456789 _____

The Nationwide PDS number is assigned once you have been appointed to sell Nationwide products through Beam Dental. This can be found on your Nationwide Welcome Letter and on your executed contract. Want to start an appointment or have questions about your current status? Please email appointments@beam.dental.

 Back  Next

Beam Implementation Overview

Enter your information

Let's get some details.

Great, we just need some information.

First Name
Your

Last Name
Name

Email
broker@example.com

Which of the following best describes you?

Employer Representative

Agent Representative

Nationwide Producer Number (if assigned)
123456789

The Nationwide PDS number is assigned once you have been appointed to sell Nationwide products through Beam Dental. This can be found on your Nationwide Welcome Letter and on your executed contract. Want to start an appointment or have questions about your current status? Please email appointments@beam.dental.

This will only appear if your group has a Nationwide line of coverage.

Enter the group's information

Let's get some details

Who is the employer representative that will sign the application?

First Name
Group

Last Name
Contact

Email Address
group@company.com

Back

Next

Note: This contact is who will be signing the applications on behalf of the group.

Enter the group's address

Let's get some details.

What's the address of the group?

Group Name
Company Name Here

Address 1
123 Avenue Road

Address 2

City	State	Zip Code
City	Texas	78714

Phone
(111) 222 3344

Fax

Back

Next

Beam Implementation Overview

Enter group specific business information

Nationwide

Business Questions

Employer's Tax Identification Number
12-1234567

Business Start Date (MM/DD/YYYY)
12/16/1996

Describe the Nature of Business
Enter description here

Back

Next

This will only appear if your group has a Nationwide line of coverage.

Confirm billing address

Let's get some details.

Are the billing and physical addresses the same?

Back

YES

NO

Next

Note: If you choose “NO”, you can enter in the different billing address

Enter billing contact

Let's get some details.

Who is the billing contact?

First Name
Billing

Last Name
Contact

Email Address
billing@company.com

Phone Number
(123) 456 7788

Back

Next

Enter eligibility contact

Let's get some details.

Are the admin/eligibility and billing contacts the same?

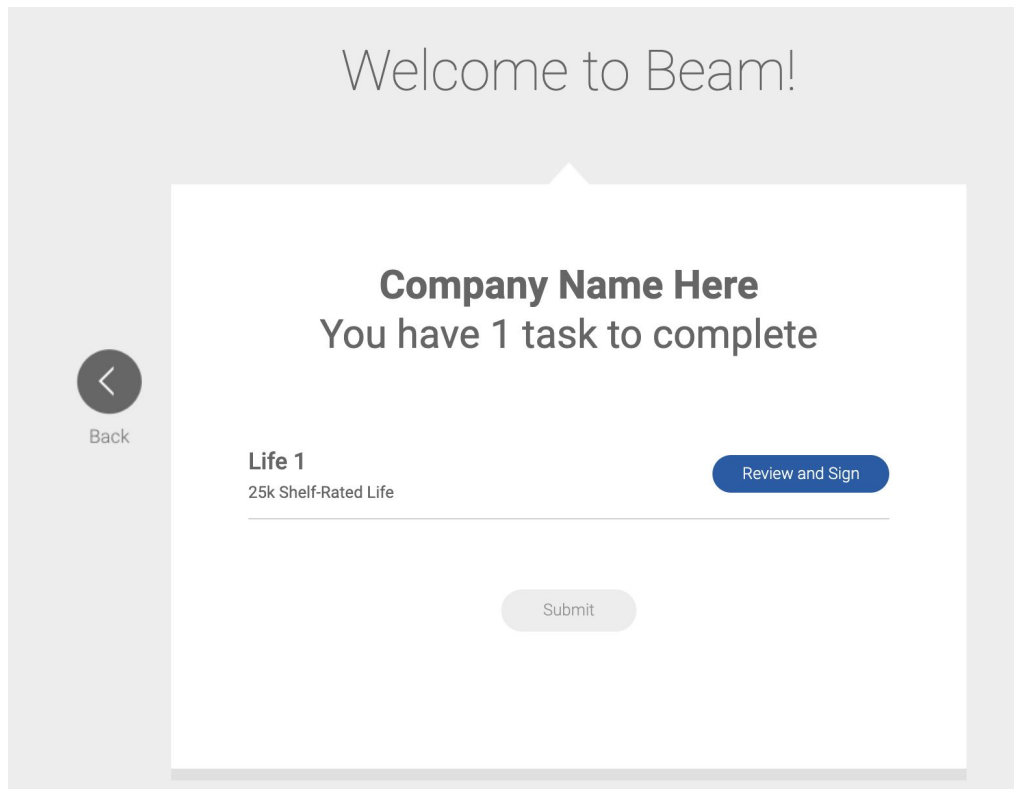
YES NO

Back Next

Note: If you choose “NO”, you can enter the different admin/eligibility contact

Beam Implementation Overview

Click “review and sign”



Note: there will be as many “tasks” as there are plans, per group.

Assign a waiting period

25k Shelf-Rated Life

What is the new hire waiting period for this line of coverage?

How long after the date of hire until a full time employee is covered?

Select days

1st of the month after 0 days ▼

For example, an employee hired on 4/15 will get coverage on: 5/01

Back

Next

Note: you will be asked to add a WP for each plan.

Beam Implementation Overview

Review the application and sign

25k Shelf-Rated Life

Review and sign application.

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Supplemental Application & Policyholder Application

Nationwide Employee Benefits

In order to expedite the underwriting and processing of your new group app business application, please complete and submit this Application Packet.

GROUP INFORMATION

Group/Applicant Name: Company Name Here
Requested Effective Date: 04/01/2022

Note: If Disability coverage purchased and this is a takeover plan, please submit copies of prior carrier disability policies/certificates.

ELIGIBILITY REQUIREMENTS

Are there any employees not actively at work? Yes No
Any employees not actively at work on the effective date of the plan are not eligible for benefits.

If "Yes" Please complete the section below.

Name	Age	Gender	Reason for absence (i.e. disability, leave of absence, etc)	Date last worked	Expected date of return

Next

Back

Sign Here


Next

Beam Implementation Overview

Press submit to send the invite to your group

Welcome to Beam!


Company Name Here
You have 0 tasks to complete

 Back

Life 1 ✓ Completed
25k Shelf-Rated Life

[Submit](#)

That's it!



Thank you! Group applications have been sent to the employer rep. Once they sign and submit payment info, we'll send you a copy of the completed paperwork and get group enrollment underway.

If you have any other questions about your group email implementations@beam.dental.

Beam Implementation Overview

Group receives an email invite

Beam Dental
group@company.com

Company Name Here's group app(s) are ready to review and sign!

beam smarter dental care www.beam.dental

Review and sign your Beam Dental group app(s)

This email is intended only for you. If you are not the right contact, you can provide contact details by following the link below.

The group app(s) for Company Name Here are ready to be reviewed and signed. Simply follow the link below to complete the group app(s).

[Review & Sign](#)

FAQs

What information do I need to review before signing?

- Group address
- Waiting period
- Payer and billing information for ACH withdrawal (if applicable)

What happens if changes are made to the application(s)?

An email will be sent notifying signers to re-review the application(s) and sign again.



Beam Implementation Overview

Group reviews application

Welcome to Beam!

Company Name Here
You have 2 tasks to complete

Life 1
25k Shelf-Rated Life Review and Sign


Payment Information Submit

Submit

25k Shelf-Rated Life

Review and sign application.

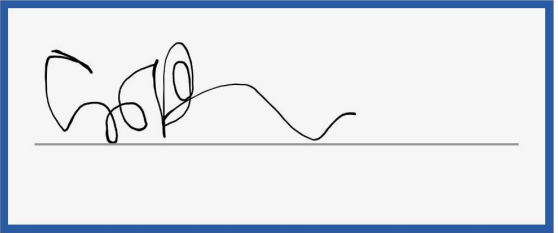
Back Next

 **Supplemental Application & Policyholder Application**
Nationwide Employee Benefits

In order to expedite the underwriting and processing of your new group app business application, please complete and submit this Application Packet.

GROUP INFORMATION
Group/Applicant Name: Company Name Here
Proposed Effective Date: 04/01/2022

Sign Here



Back Next

[Need to make changes?](#)

Beam Implementation Overview

Group provides ACH information & submits

One last thing.

Provide your ACH payment details

Bank Name

Routing Number

Account Number

Account Type

Checking

Savings

We will just need your signature

[Clear](#)

I agree to the [terms](#) and authorize Beam to withdraw my monthly premium

[I don't have my ACH payment details](#)

Back Next

Welcome to Beam!

Company Name Here

You have 0 tasks to complete

[Life 1](#) ✓ Completed

25k Shelf-Rated Life

[Payment Information](#) ✓ Completed

[Submit](#)

Beam Implementation Overview

That's it!

That's it!



Thank you! Your application is complete.

Our implementation specialists will now work on your group's enrollment.

View your docs

[Life Application 1](#)

If you have any questions, please reach out to implementations@beam.dental.

Beam Implementation Overview

Copies of documents will be emailed to you & the group

Beam Dental
broker@example.com

Your group application(s) are complete!

Beam Dental
group@company.com

Your group application(s) are complete!



Beam Implementation Overview

Account Manager Flow

- An admin from the brokerage will enter in all of the group details & name the broker
- The broker will then review these details and sign
- The group will then review information, sign the application, and add payment information

Beam Implementation Overview

The initial invite is sent to the brokerage admin

Beam Dental
accountmanager@example.com

Almost there! Please add contacts for Company Name Here

beam[®] smarter dental care www.beam.dental

It's easy to get started.
Just follow the link below to add contacts for Company Name Here.

This email is intended only for you. If you are not the right contact, you can provide contact details by following the 'Add Contacts' link below.

Once contacts have been added, each contact will receive an email that the group app(s) are ready to review and sign.

[Add Contacts](#) ← Click here to begin

Thanks!
- The Beam Team

Welcome to Beam!

Company Name Here
Ready to get your company setup?

[Let's Get Started](#)



Admin says they will *not* be signing

Let's get some details.

Will you be one of the two signers of the application?

YES

NO



Back



Next

Let's get some details.

Will you be filling out the information in the group application(s) for the signatories?

YES

NO



Back



Next

But they will be filling out the information on behalf of a signer

Admin enters the group's address

Let's get some details.

What's the address of the group?

Group Name
Company Name Here

Address 1
123 Avenue Road

Address 2

City	State	Zip Code
City	Texas	78714

Phone
(111) 222 3344

Fax

Back

Next

Beam Implementation Overview

Admin enters group specific business information

Nationwide

Business Questions

Employer's Tax Identification Number
12-1234567

Business Start Date (MM/DD/YYYY)
12/16/1996

Describe the Nature of Business
Enter description here

Back

Next

This will only appear if your group has a Nationwide line of coverage.

Admin confirms billing address

Let's get some details.

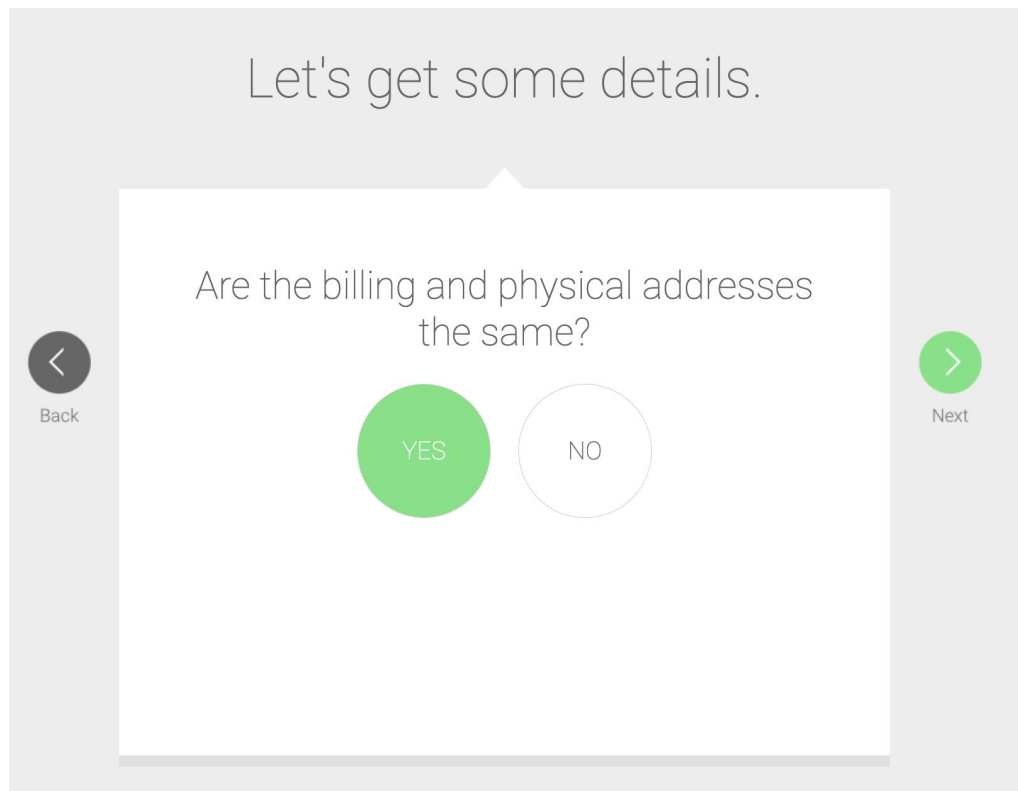
Are the billing and physical addresses the same?

Back

Next

YES

NO



Note: If you choose “NO”, you can enter in the different billing address

Admin enters billing contact

Let's get some details.

Who is the billing contact?

First Name
Billing

Last Name
Contact

Email Address
billing@company.com

Phone Number
(123) 456 7788

Back

Next

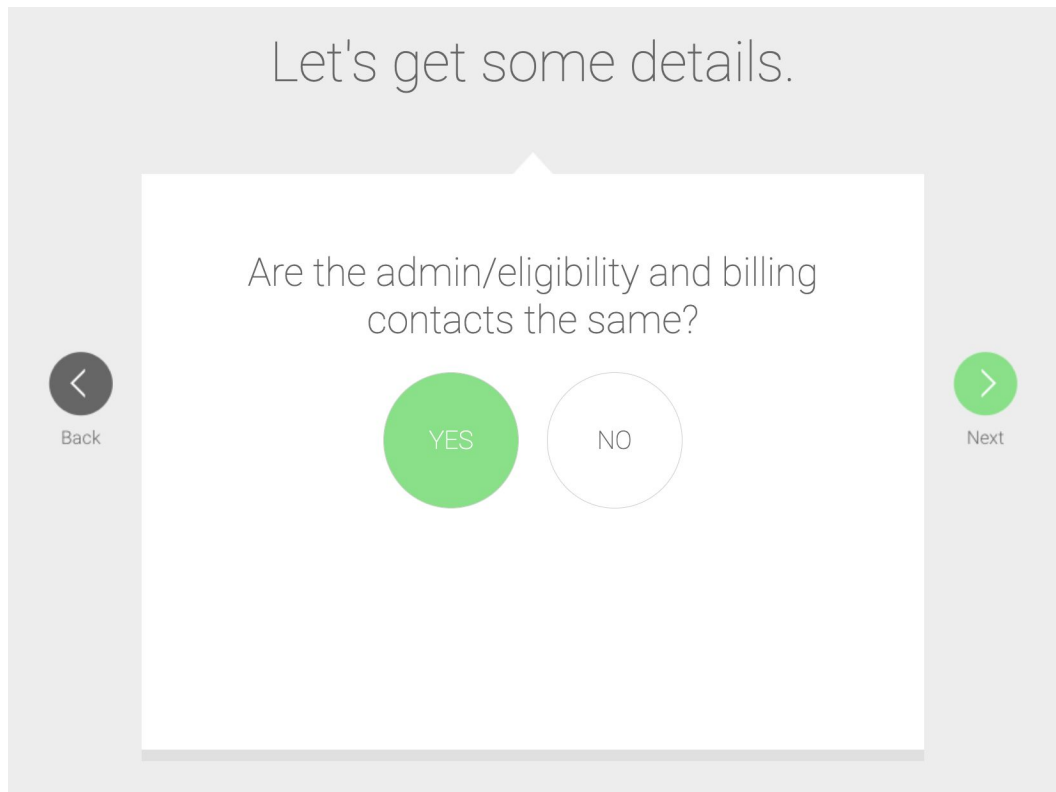
Admin enters eligibility contact

Let's get some details.

Are the admin/eligibility and billing contacts the same?

YES NO

Back Next



Note: If you choose “NO”, you can enter the different admin/eligibility contact

Beam Implementation Overview

Admin names the signers

Thanks for the info!

Who will sign the application?

Employer Representative

First Name

Last Name

Group

Contact

Email Address

group@company.com

Agent Representative

First Name

Last Name

Broker

Name

Email Address

broker@example.com



Back



Next

Thank you!



The link for the group app
has been sent to the broker.

If you have any other questions about your
group email implementations@beam.dental.

Beam Implementation Overview

Broker receives the email

Beam Dental
broker@example.com

Company Name Here's group app(s) are ready to review and sign!

beam smarter dental care www.beam.dental

Review and sign your Beam Dental group app(s)

This email is intended only for you. If you are not the right contact, you can provide contact details by following the link below.

The group app(s) for Company Name Here are ready to be reviewed and signed. Simply follow the link below to complete the group app(s).

[Review & Sign](#)

Welcome to Beam!

Company Name Here
Ready to get your company setup?

[Let's Get Started](#)

Beam Implementation Overview

Broker identifies themselves

Let's get some details.

Will you be one of the two signers of the application?

YES

NO



Back



Next



Let's get some details.

Great, we just need some information.

First Name

Your

Last Name

Name

Email

broker@example.com

Which of the following best describes you?

- Employer Representative
- Agent Representative

Nationwide Producer Number (if assigned)

123456789

The Nationwide PDS number is assigned once you have been appointed to sell Nationwide products through Beam Dental. This can be found on your Nationwide Welcome Letter and on your executed contract. Want to start an appointment or have questions about your current status? Please email appointments@beam.dental.



Back



Next

Beam Implementation Overview

Broker identifies themselves

Let's get some details.

Great, we just need some information.

First Name
Your

Last Name
Name

Email
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Which of the following best describes you?

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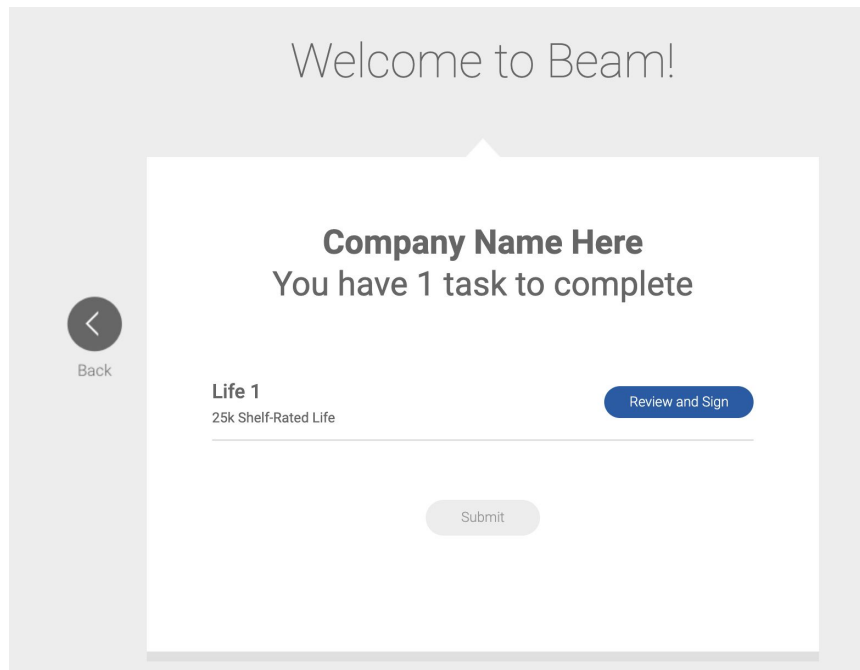
The Nationwide PDS number is assigned once you have been appointed to sell Nationwide products through Beam Dental. This can be found on your Nationwide Welcome Letter and on your executed contract. Want to start an appointment or have questions about your current status? Please email appointments@beam.dental.

This will only appear if your group has a Nationwide line of coverage.

Beam Implementation Overview

Broker clicks “next” until hitting the tasks screen

- All of the information the account manager already entered will auto-populate
- You have the opportunity to make edits if needed prior to signing



Note: there will be as many “tasks” as there are plans, per group.

Broker assigns a waiting period

25k Shelf-Rated Life

What is the new hire waiting period for this line of coverage?

How long after the date of hire until a full time employee is covered?

Select days

1st of the month after days

For example, an employee hired on 4/15 will get coverage on: 5/01

Back

Next

Note: you will be asked to add a WP for each plan.

Beam Implementation Overview

Broker reviews the application and sign

25k Shelf-Rated Life

Review and sign application.



Supplemental Application & Policyholder Application

Nationwide Employee Benefits

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GROUP INFORMATION

Group/Applicant Name:

Requested Effective Date:

Note: If Disability coverage purchased and this is a takeover plan, please submit copies of prior carrier disability policies/certificates.

ELIGIBILITY REQUIREMENTS

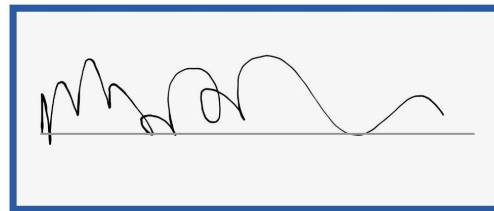
Are there any employees not actively at work? Yes No

Any employees not actively at work on the effective date of the plan are not eligible for benefits.

If "Yes", Please complete the section below.

Name	Age	Gender	Reason for absence (i.e. disability, leave of absence, etc)	Date last worked	Expected date of return

Sign Here



Back



Next



Back



Next



Beam Implementation Overview

Broker presses submit to send the invite to group

Welcome to Beam!

Company Name Here
You have 0 tasks to complete

Life 1

25k Shelf-Rated Life

✓ Completed

Submit

Back



That's it!



Thank you! Group applications have been sent to the employer rep. Once they sign and submit payment info, we'll send you a copy of the completed paperwork and get group enrollment underway.

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Beam Implementation Overview

Group reviews application

Welcome to Beam!

Company Name Here
You have 2 tasks to complete

Life 1

25k Shelf-Rated Life

Review and Sign

Payment Information

Submit

Submit



25k Shelf-Rated Life

Review and sign application.



Supplemental Application & Policyholder Application

Nationwide Employee Benefits

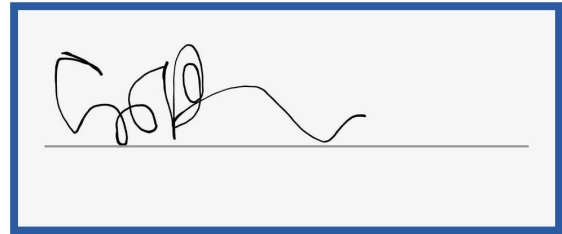
In order to expedite the underwriting and processing of your new group app business application, please complete and submit this Application Packet.

GROUP INFORMATION

Group/Applicant Name: Company Name Here

Proposed Effective Date: 04/01/2022

Sign Here



[Need to make changes?](#)

Beam Implementation Overview

Group provides ACH information & submits

One last thing.

Provide your ACH payment details

Bank Name

Routing Number

Account Number

Account Type

- Checking
 Savings

We will just need your signature

X

Clear

I agree to the [terms](#) and authorize Beam to withdraw my monthly premium

I don't have my ACH payment details

Back

Next



Welcome to Beam!

Company Name Here
You have 0 tasks to complete

[Life 1](#)

25k Shelf-Rated Life

✓ Completed

[Payment Information](#)

✓ Completed

Submit

Beam Implementation Overview

That's it!

That's it!



Thank you! Your application is complete.

Our implementation specialists will now work on your group's enrollment.

View your docs

[Life Application 1](#)

If you have any questions, please reach out to implementations@beam.dental.

Beam Implementation Overview

Copies of documents will be emailed to you & the group

Beam Dental
broker@example.com

Your group application(s) are complete!

Beam Dental
group@company.com

Your group application(s) are complete!

03

**SOMETHING CHANGED!
RESIGNATURES**

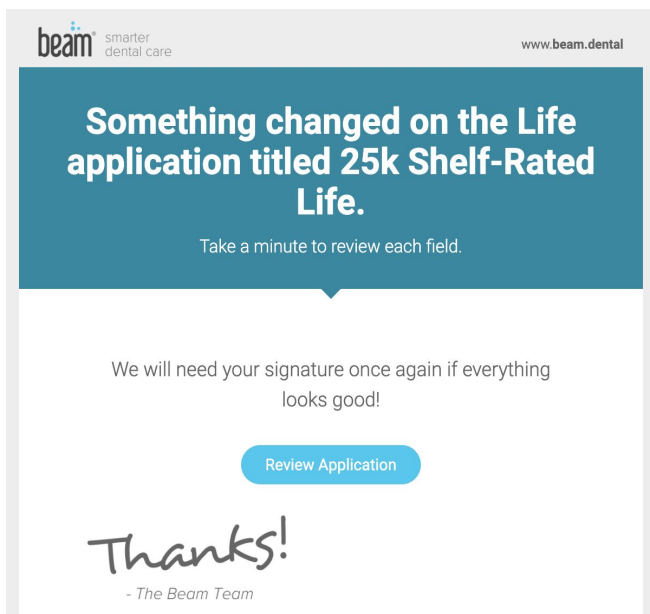


Beam Implementation Overview

Resignatures

Beam Dental
broker@example.com

Something changed on one of your group apps



- Group applications are legal contracts. When information changes after a party has signed it, that party must *resign* the updated application
- What types of changes can cause a resign? Includes but not limited to:
 - Updated waiting periods
 - Updated addresses
 - Updated contact information
 - Updated plan contributions

Beam Implementation Overview

Questions?

- Please reach out to your Beam sales representative or email implementations@beam.dental - we're happy to help!

