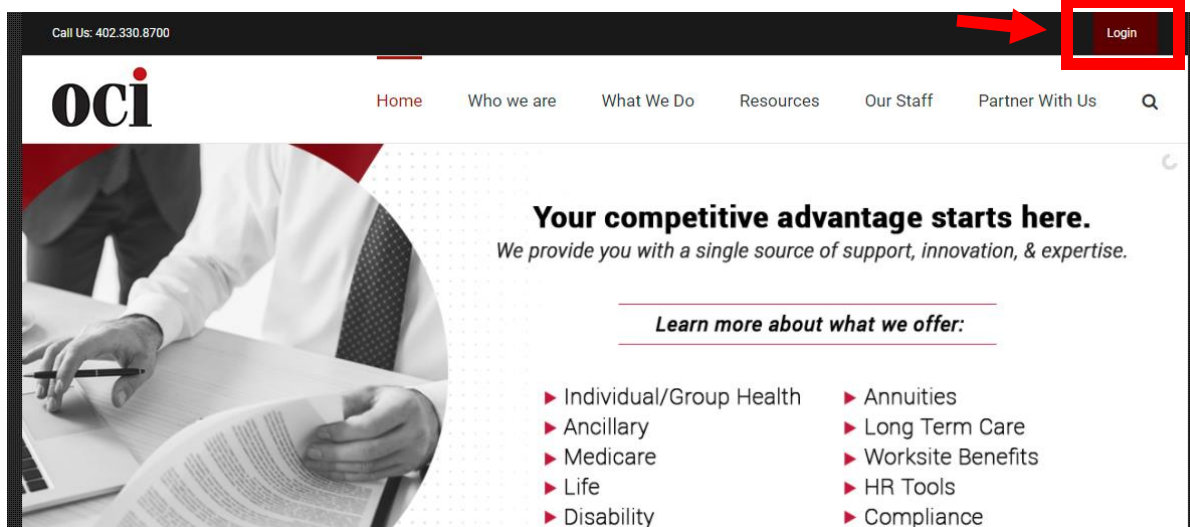


OCI Split Case Referral Program

Tracking Your Referred Business in Your OCI Account

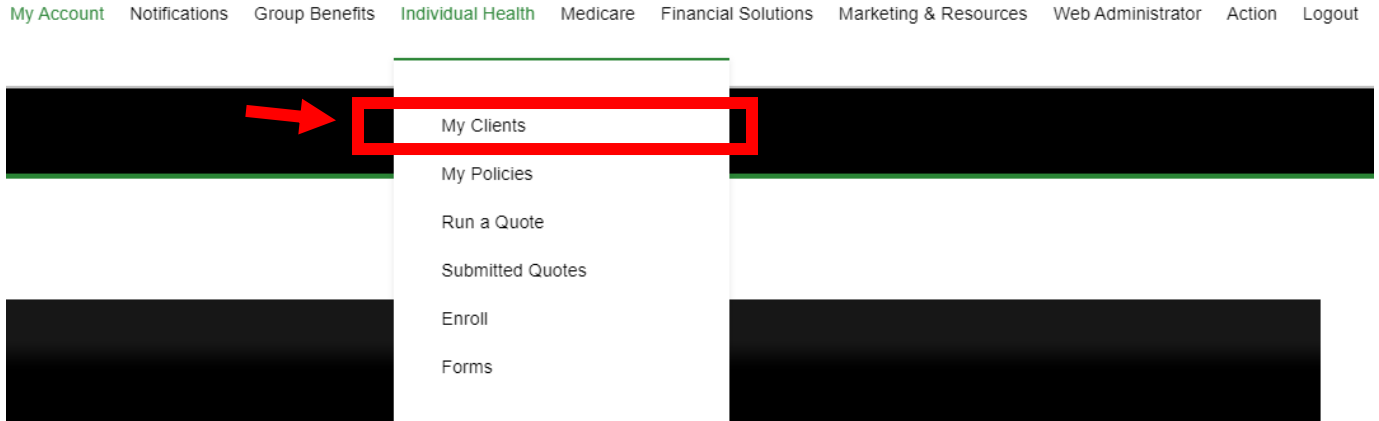
1. Go to our website <https://www.ociservices.com/> and “Login” in the top right corner.



2. Enter your credentials provided by OCI.

A screenshot of the OCI login page. It features the OCI logo at the top left. Below the logo are two input fields: 'User Name' and 'Password'. A 'Login' button is centered below the fields. Below the button, the text 'Forgot Your Password?' is displayed in green. Below that, the text 'Invalid Login' is displayed in red. At the bottom, there is a line of text: 'By logging in, you agree to the terms and conditions.' and a version number 'AGB v. 5.2.0.0.4' in the bottom right corner.

3. Once you are logged in, navigate to the **“Individual Health”** menu, and select from the drop-down options, **“My Clients”**.
 - a. This will provide you access to view all your client referrals in our system.
 - b. Here you will have a view of the basic **“Client Information”** on the referral.



4. Click **“View”** next to the client's name you are inquiring about to access more detail.



Individual Health - My Clients

Individual Clients List

3 Records

View	Client	Birth Date	Status	Address1	Address2	Address3	City	County	State	Zip
View	CLIENT, MEDICARE	3/24/1954	ACTIVE	123 FIDO LN			PHOENIX	MARICOPA	AZ	8501
View	CLIENT, TESTBROKER	9/5/1965	ACTIVE	123 MAIN ROAD			PHOENIX	MARICOPA	AZ	8501

5. To check the status of a referral, click the “Client Tasks” tab.

The screenshot shows the OCI Individual Health - My Clients interface. At the top, there is a navigation bar with the OCI logo and links for My Account, Notifications, Group Benefits, Individual Health, Medicare, Financial Solutions, Marketing & Resources, and Web Administrator. Below this is a header for 'Individual Health - My Clients'. A table lists client records with columns for Name, Birth Date, Status, Address, City, State, and ZIP. The first record is 'CLIENT, TESTBROKER' with birth date 9/5/1965, status ACTIVE, and address 123 MAIN ROAD, PHOENIX, MARICOPA, AZ, 85012. The second record is 'Guy, New' with birth date 4/1/1956 and status ASSOCIATED. A 'Show All Records' dropdown is at the bottom right of the table. Below the table is a section for 'Individual Client: CLIENT, TESTBROKER'. This section has a tabbed interface with 'CLIENT INFORMATION', 'CLIENT POLICIES', 'CLIENT FINANCIALS', 'CLIENT ATTACHMENTS', 'CLIENT NOTES', and 'CLIENT TASKS'. The 'CLIENT TASKS' tab is highlighted with a red box and an arrow. The 'CLIENT INFORMATION' tab is active, showing fields for Name, Birth Date, SSN, Status, Primary Contact Address, Phone, Fax, and Email. The 'Links' section contains a 'Client Bio' button.

OCI My Account Notifications Group Benefits Individual Health Medicare Financial Solutions Marketing & Resources Web Administrator THE TEST B...

Individual Health - My Clients

View	CLIENT, TESTBROKER	9/5/1965	ACTIVE	123 MAIN ROAD			PHOENIX	MARICOPA	AZ	85012	
View	Guy, New	4/1/1956	ASSOCIATED								

[Show All Records](#) ▾

Individual Client: CLIENT, TESTBROKER

CLIENT INFORMATION CLIENT POLICIES CLIENT FINANCIALS CLIENT ATTACHMENTS CLIENT NOTES CLIENT TASKS

Individual Client

Name: CLIENT, TESTBROKER

Birth Date: 9/5/1965

SSN: 111-22-3334

Status: ACTIVE

Primary Contact

Address: TESTBROKER CLIENT
123 MAIN ROAD
Phoenix, AZ 85012

Phone: [Empty]

Fax: [Empty]

Email: [Empty]

Links

[Client Bio](#)

6. To view task detail, click “Select”. This will provide a view of notes, status updates, and attachments pertaining to your client referral.