

# Agency Setup Sheet



## AGENCY INFORMATION

Full Legal Name of Agency:

Street Address:

City:

State:

Zip:

Telephone Number:

Website Address:

Who is your Sales Representative?

## PRIMARY CONTACT

Name:

Title:

Telephone Number:

Email Address:

Select an Agency ID to uniquely identify the agency in the eHealthApp portal URL. It is common for the Agency ID to be the same as the domain name of the agency website, if applicable. **Agency IDs can only contain letters and numbers (no spaces, symbols, or punctuation).** An Agency ID should be easy to remember and type.

**Example:** Acme Benefits Group might choose *Acme* or *AcmeBenefits* as the Agency ID.

**Please print your desired Agency ID(s) in the order of preference below (will be assigned based on availability):**

Agency ID – First Choice:

Agency ID – Second Choice:

Agency ID – Third Choice:

## NEXT STEPS

Please complete and send this form, along with your agency logo, to [Support@eHealthApp.com](mailto:Support@eHealthApp.com).

## FULL DEMO

eHealthApp offers a number of services in addition to the features available with the SA Benefit Services portal. Many brokers enjoy the security and a streamlined enrollment process as a result of our software. Our customizable Smart Form technology allows you to create branded enrollment questionnaires that employers appreciate and employees easily understand. This often results in improved client relationships and increased participation.

**When would you like to schedule your comprehensive demo of the eHealthApp system?**

- As soon as possible     In 2-4 weeks     Not at this time