Electronic Group Information Form – Help Materials for Groups/Agents/Brokers

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eGIF FAQs

Answers to frequently asked questions on the eGIF form that the Groups/Agents/Brokers complete

1. **How do I access the eGIF?**

   You will receive a link to the eGIF form from your Sales Rep. Once you click on that link, it will launch the form and you can begin completing it.

2. **Is there a certain browser I should use to complete the eGIF?**

   We recommend using Google Chrome, Microsoft Edge, or Apple Safari for the most optimized experience. You may use other browsers, but you also may experience slowness.

3. **Does the Group/Agent filling out the eGIF need to have a Salesforce license or login?**

   No, they can use the link in any web browser on their computer, mobile phone, or tablet to complete the eGIF without needing a username or password.

4. **What if I have questions about how to complete the eGIF?**

   Reach out to your Sales Rep. The eGIF also includes notes and help sections to help facilitate completion, but the Group/Agent should reach out to their Sales Rep if they need further help.

5. **Is the Group/Agent able to save the eGIF and come back to finish it later?**

   Yes, every page has a Save & Finish Later button, and it will save all information that has been inputted. The form also automatically saves your answers on each page as you input it. Use the same URL link to go back into the eGIF to finish and submit.

6. **Is there a specific time frame the Group/Agent has to complete the eGIF?**
   Yes, the eGIF link will expire after 30 days. After 30 days, contact your Sales Rep to set up a new eGIF.

7. **What if there are multiple contacts, subscriber definitions, member waiting periods, or eligibility requirements for the different subgroups?**

   As the Group/Agent, you will need to provide those details in a document and attach it to the eGIF, or call your Sales Rep. The eGIF cannot gather multiple definitions or assign them to subgroups.

8. **Will the Sales Rep be able to help the group/agent/broker complete the eGIF?**

   Yes, the Sales Rep can use the editor link to help the Group/Agent/Broker complete the eGIF.

9. **Are the Group and Agent able to work together to complete the eGIF?**
   Yes, anyone with the editors link can go into the eGIF and fill in information. The editors link can be forwarded from the Group to the Agent, or vice versa, and anyone with the link can enter information.

Step-By-Step Process

Step-by-step how to complete the eGIF.

1. Open email from Sales Rep with eGIF URL link
2. Click eGIF link and launch the form
3. Complete all required fields within the form and reach out to your Sales Rep with any questions you have along the way
4. Submit the form and wait to hear from your Sales Rep with next steps