Secure Submission vs. Email Submission
Keeping Your Clients’ Information Safe

**EMAIL SUBMISSION STEPS**

1. Log in to Email
2. Start a New Email
3. Choose Email Recipient
4. Create Subject Line
5. Compose Email
6. Attach Documents
7. Hit Send

**NOT SECURE**

Why Email is too Risky for PII and PHI.

Did you know an email message can be stored in multiple locations, including on the:

- Sender’s computer
- Server of your email or internet service provider
- Company’s email (SMTP) server
- Receiver’s computer

This presents a considerable concern for companies that use email to send files containing sensitive information as 94% of malware was delivered by email*.

The industry with the highest number of attacks by ransomware is the healthcare industry**.


**AGENCY WORKSPACE SUBMISSION STEPS**

1. Log in to Agency Workspace
2. Start an Enrollment Submission
3. Add Client’s Address
4. Add Client’s Phone Number
5. Add Client’s EIN
6. Choose Submission Contact
7. Hit Submit

**SECURE**

Why Agency Workspace is the Safe Choice.

- **Endpoint and Systems Security**
  - Databases are encrypted

- **Application Security**
  - Data masking of sensitive data with role-based access
  - Release management includes OWASP security testing and a full technical committee review
  - Agency Workspace provides secure business case submission

- **Data Security**
  - All PHI/PII data is encrypted at rest and in motion
  - Third-party Information Security Risk Assessment is performed regularly


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BenefitMall’s Agency Workspace provides a simple, seamless and secure method to send your client’s enrollments to our Service teams.

**It’s as easy as 1-2-3!**

**STEP 1**
**INPUT CLIENT INFORMATION**
If the client already exists in Agency Workspace the form will begin to populate the details as you type — it is that smart!

**STEP 2**
**SELECT YOUR PLAN**
As you select the Carrier, line of coverage and plan name, the system will help reduce input time by populating details as you type.

**STEP 3**
**UPLOAD YOUR DOCUMENTS SECURELY**
Safe and secure and without limitations. You can upload any file size without worrying they will be too big for email.

BenefitMall’s Agency Workspace gives you a 360-degree view of from quote to enrollment ensuring transparent service and accurate and timely submissions to carriers.
With this Enrollment Wizard, you can securely submit your client’s information through a user-friendly online form and get immediate visibility to your enrollment status from your main dashboard. Eliminate the need to track cases through email and be in sync with BenefitMall every step of the way.

A Review the Client Information, and add any additional information needed. Start with a BenefitMall Client Ready Quote System (CRQS) Quote will reduce the amount of data you need to enter.

B Select “Manual Enrollment” to upload documents right to Agency Workspace.

C Select the Carrier and the Plan your Client is enrolling in and click Next.

D Upload the paper forms your clients and their employees completed along with any other documents requested by the Carriers and click Finish!

E Navigate to Enrollments from the main navigation to track the status of your enrollments. Our Service teams will be in touch if there is any missing information.

Got Questions? Get the expert support you need to be successful!

EMAIL
DigitalSupport@benefitmall.com

LIVE CHAT
Accessible via support center in Agency Workspace

HELPLINE
844-iGuy-Help (844-448-9435)

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