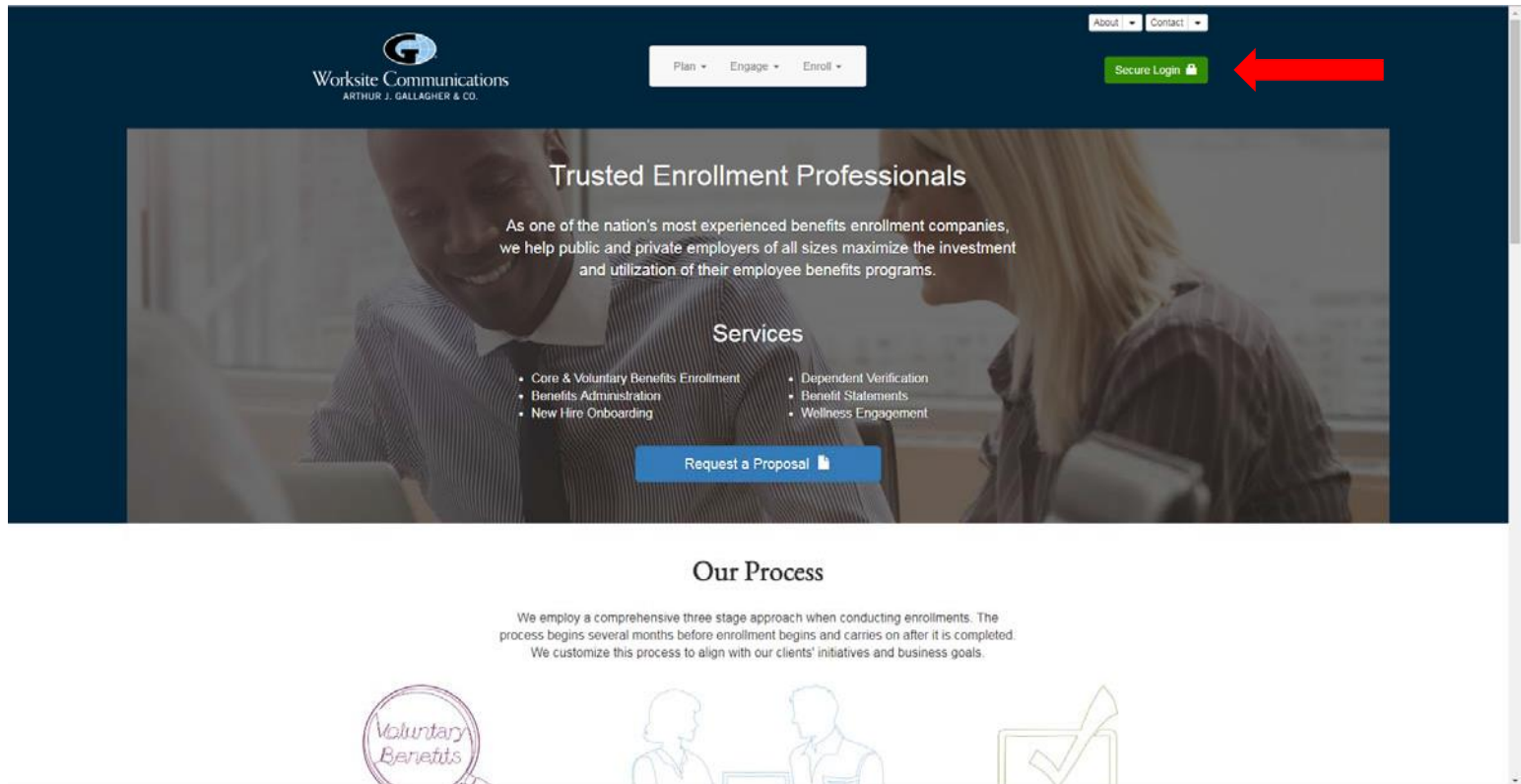


# Logging In and Navigating the Website

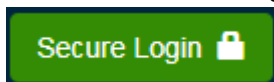
## I. Accessing our website

To access our website you go to [www.enrollmentcompany.com](http://www.enrollmentcompany.com).



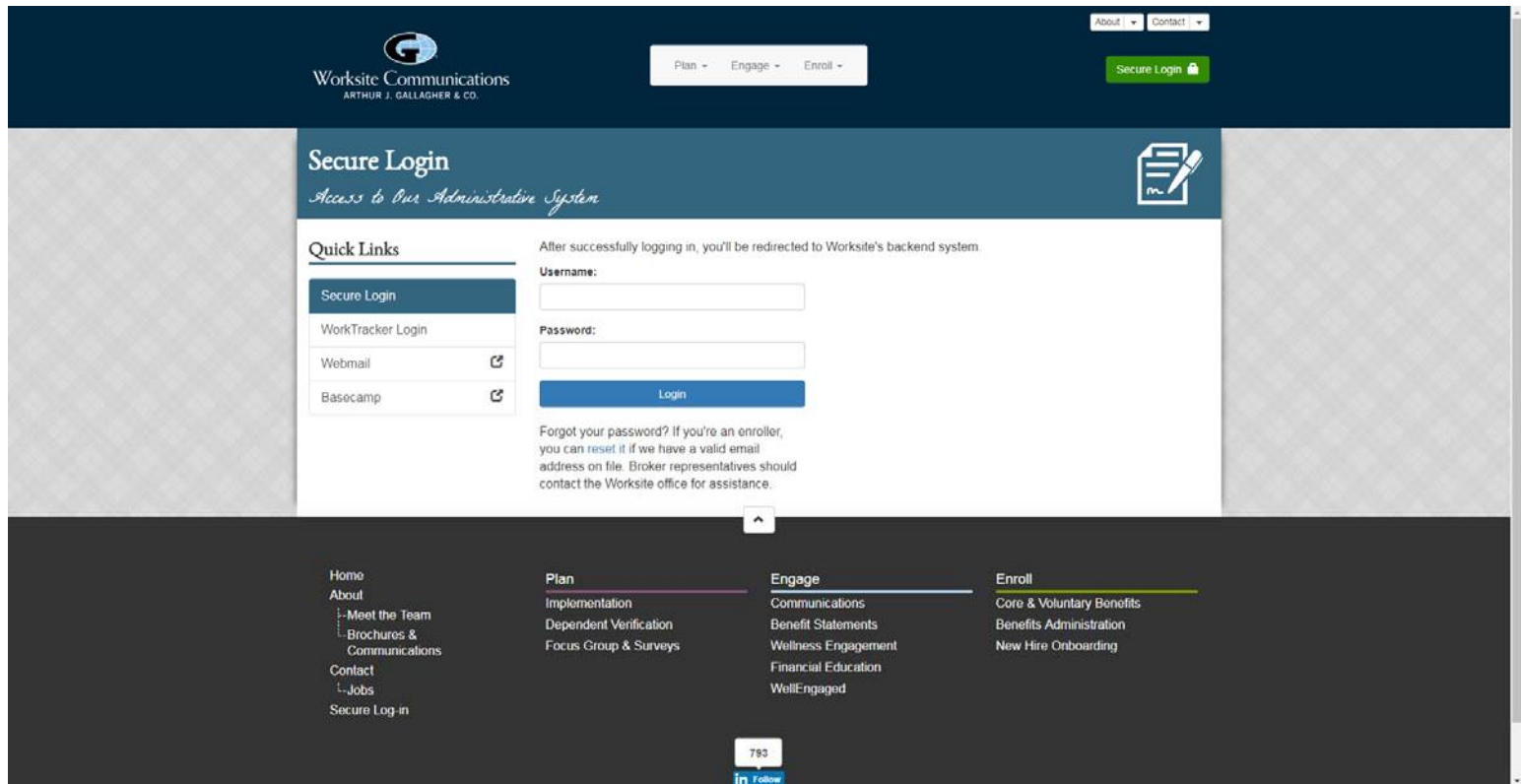
## II. Navigating to the login page

You will click on the green Secure Login button on the top right hand of the page.



### III. Logging In

You are now at the login page.



#### Username

When your profile has been created by Gallagher Enrollment Solution's administration team, you will also be assigned a username, the format is typically first initial of the first name followed by the last name (e.g., Name: John Smith Username: jsmith). If your last name is hyphenated we will select the last portion of your hyphenated name.

#### Passwords

Passwords are computer generated, if you do not receive a password please contact an administration team member or:

**Alaina Esclavon**

(205) 986-7716

[aesclavon@enrollmentcompany.com](mailto:aesclavon@enrollmentcompany.com)

#### Password Resets

Under the blue Login button there is a link for resetting your password. In order to reset your password you already need to have logged in previously and filled in the info for your security question. If you have never logged in or never filled in your security question and need a password reset please contact an administrative team member or Cathey Sarris (contact info is above). Password resets will be emailed to the address on file, please remember to check your spam or junk email folders if you do not see the email in your inbox within 5-10 minutes.

## Logging In

You will enter in your username and Password and click the blue Login button.

After successfully logging in, you'll be redirected to Worksite's backend system.

Username:

Password:

Login

Forgot your password? If you're an enroller, you can [reset it](#) if we have a valid email

After you log in you will be directed to the Administration Home Page.

## IV. Administration Home Page

My Cases

The first screen you see on the Administration Home Page is the My Cases page, this allows you to access information about your current and closed cases.

**Gallagher** | Enrollment Solutions

Enroller Logged In: Sample Test [\[Log Out\]](#)

### Administration Home Page

[Well Engaged Web](#)

Well Engaged can now be accessed via the button just above and to the right!

**My Cases** | Selected Case | Production Metrics | Call Center Metrics | Inventory Management | Miscellaneous | Employment Forms | Deposits

**My Active Cases**

[2126: TEST Ozark School District - 2022](#)

**Closed Cases**

Began 2018:  
1349: Z-Testing Demo

## Inventory Management

This screen is not accessible by enrollers.

## Miscellaneous

The miscellaneous screen has many of the features that you will find useful, including updating your profile info and your password, as well as access to your itineraries. It also links to our Well Engaged software which is what you will use while enrolling.



Enroller Logged In: Sample Test [\[Log Out\]](#)

### Administration Home Page

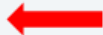
[Well Engaged Web](#)

Well Engaged can now be accessed via the button just above and to the right!

[My Cases](#) [Selected Case](#) [Production Metrics](#) [Call Center Metrics](#) [Inventory Management](#) [Miscellaneous](#) [Employment Forms](#) [Deposits](#)

#### Non-Case-Specific Miscellaneous Links

[Update Profile](#)



[My Itineraries](#)

[WorkTracker](#)

## Employment Forms

Includes useful documents, such as W-9 for things like address changes, expense reports, vehicle mileage and a copy of Gallagher Enrollment Solutions Travel Guidelines Policy.



Enroller Logged In: Sample Test [\[Log Out\]](#)

### Administration Home Page

[Well Engaged Web](#)

Well Engaged can now be accessed via the button just above and to the right!

[My Cases](#) [Selected Case](#) [Production Metrics](#) [Call Center Metrics](#) [Inventory Management](#) [Miscellaneous](#) [Employment Forms](#) [Deposits](#)

#### Employment Forms

[W-9](#) - Please fax completed form to Kim Farris at 850-521-0111

[ExpenseWire Login](#)

[Travel Policy](#)

## Deposits

The Deposits page has all of your payment detail summaries for all payments, per diems and reimbursements you receive from Gallagher Enrollment Solutions. They will appear as summaries and links to PDF files.



Enroller Logged In: Sample Test [\[Log Out\]](#)

### Administration Home Page

Well Engaged Web

Well Engaged can now be accessed via the button just above and to the right!

[My Cases](#) | [Selected Case](#) | [Production Metrics](#) | [Call Center Metrics](#) | [Inventory Management](#) | [Miscellaneous](#) | [Employment Forms](#) | **[Deposits](#)**

#### View Deposit Information

Remittances (from January 2017 forward) are listed below.

For inquires email [kfarris@enrollmentcompany.com](mailto:kfarris@enrollmentcompany.com) or call 850-521-0112 extension 1748.

[Travel Policy](#)

[Payments Schedule](#)

#### DEPOSIT SUMMARIES (created by WorkTracker system)

Invoice Number	Amount	Payment Date*	Case	Action
6/7/2022-JZ	2,870.00	06/13/2022	Zeeco, Inc. - 2022	<a href="#">View Remittance Detail</a>
6/7/2022.1-JZ	100.00	06/13/2022	Driftwood Hospitality - 2022	<a href="#">View Remittance Detail</a>
6/7/2022.2-JZ	-40.01	06/13/2022	Driftwood Hospitality - 2022	<a href="#">View Remittance Detail</a>
6/7/2022.3-JZ	70.00	06/13/2022	Avalon Healthcare Aquisition - 2022	<a href="#">View Remittance Detail</a>
	<b>2,999.99</b>	<b>06/13/2022</b>	<b>Total Deposit</b>	
5/24/2022-JZ	280.00	05/31/2022	Zeeco, Inc. - 2022	<a href="#">View Remittance Detail</a>
5/24/2022.1-JZ	1,400.00	05/31/2022	Driftwood Hospitality - 2022	<a href="#">View Remittance Detail</a>
5/24/2022.2-JZ	280.00	05/31/2022	Driftwood Hospitality - 2022	<a href="#">View Remittance Detail</a>
5/24/2022.3-JZ	-38.55	05/31/2022	Paramount Healthcare - 2022	<a href="#">View Remittance Detail</a>
5/24/2022.4-JZ	420.00	05/31/2022	FGF Hill Country Bakery - Perpetual 2022	<a href="#">View Remittance Detail</a>
	<b>2,341.45</b>	<b>05/31/2022</b>	<b>Total Deposit</b>	

If you click the link at the right side you can view the remittance detail information which shows you a more in depth break down of your pay.

#### Remittance Detail

For inquires email [kfarris@enrollmentcompany.com](mailto:kfarris@enrollmentcompany.com) or call 850-521-0112 extension 1748.

Case: Zeeco 2022

Payment Date: 06/13/2022

Enroller Days	10.25
Enroller Rate	280.00
Enroller Total	2870.00
Total Pay	2870.00
Total Check	2870.00
On 1099	2870.00
Not On 1099	0.00

## V. Accessing your Itineraries

### Case Profile Tab

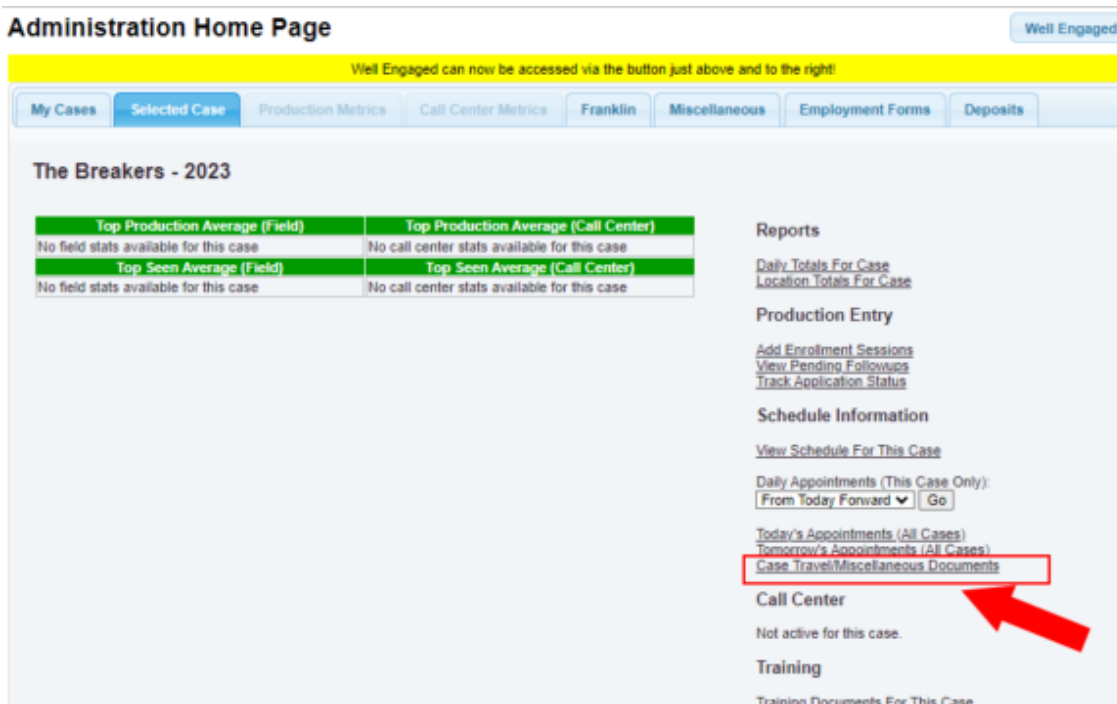
After selecting your Case Assignment link on your main dashboard you will see a link your assignment itinerary information.



### My Itineraries

After selecting the “My Itineraries” link you will be directed to your My Itineraries page where you will find a list of your case itineraries, these documents may include:

Confirmation letter, compensation info, the enrollment fact sheet, flight, car rental and lodging information.



**Administration Home Page** Well Engaged v

Well Engaged can now be accessed via the button just above and to the right!

[My Cases](#) [Selected Case](#) [Production Metrics](#) [Call Center Metrics](#) [Franklin](#) [Miscellaneous](#) [Employment Forms](#) [Deposits](#)

### The Breakers - 2023

Top Production Average (Field)	Top Production Average (Call Center)
No field stats available for this case	No call center stats available for this case
Top Seen Average (Field)	Top Seen Average (Call Center)
No field stats available for this case	No call center stats available for this case

**Reports**

- [Daily Totals For Case](#)
- [Location Totals For Case](#)

**Production Entry**

- [Add Enrollment Sessions](#)
- [View Pending Followups](#)
- [Track Application Status](#)

**Schedule Information**

- [View Schedule For This Case](#)
- Daily Appointments (This Case Only):  
From Today Forward
- [Today's Appointments \(All Cases\)](#)
- [Tomorrow's Appointments \(All Cases\)](#)
- [Case Travel/Miscellaneous Documents](#)

**Call Center**

Not active for this case.

**Training**

Training Documents For This Case

You will select the link and the file will download or open up on your browser.

## Gallagher Enrollment Solutions Admin Support

Support Team	Name	Email	Phone
Recruiting	Tara Schultz	<a href="mailto:tschultz@enrollmentcompany.com">tschultz@enrollmentcompany.com</a>	(850) 536-8639
	Gina Gillilan	<a href="mailto:ggillilan@enrollmentcompany.com">ggillilan@enrollmentcompany.com</a>	(205) 871-1082
	PJ Jimmerson	<a href="mailto:pjimmerson@enrollmentcompany.com">pjimmerson@enrollmentcompany.com</a>	(850) 205-2821
	Sayra Govea	<a href="mailto:sgovea@enrollmentcompany.com">sgovea@enrollmentcompany.com</a>	(205) 414-2642
Onboarding & Payments & Expense Wire	Alaina Esclavon	<a href="mailto:aesclavon@enrollmentcompany.com">aesclavon@enrollmentcompany.com</a>	(205) 986-7716
	Kim Farris	<a href="mailto:kfarris@enrollmentcompany.com">kfarris@enrollmentcompany.com</a>	(850) 895-1748
	Julie Harmon	<a href="mailto:jharmon@enrollmentcompany.com">jharmon@enrollmentcompany.com</a>	(850) 536-8660
Licensing	Shelby Boose	<a href="mailto:sboose@enrollmentcompany.com">sboose@enrollmentcompany.com</a>	(850) 536-8856
	Brenda Mangiamele	<a href="mailto:bmangiamele@enrollmentcompany.com">bmangiamele@enrollmentcompany.com</a>	(850) 521-2086
	Jeanette Morin	<a href="mailto:jmorin@enrollmentcompany.com">jmorin@enrollmentcompany.com</a>	(850) 521-2099
Travel	Kimberly Degroat	<a href="mailto:kdegroat@enrollmentcompany.com">kdegroat@enrollmentcompany.com</a>	(205) 871-1082
	Charlene Lennon	<a href="mailto:clennon@enrollmentcompany.com">clennon@enrollmentcompany.com</a>	(205) 578-5698
Equipment	General Email Inbox	<a href="mailto:GES.Birmingham.EquipmentRequest@ajg.com">GES.Birmingham.EquipmentRequest@ajg.com</a>	
Administration	Cathy Freesmeier	<a href="mailto:cfreesmeier@enrollmentcompany.com">cfreesmeier@enrollmentcompany.com</a>	(850) 521-2080