

Data Axle Genie 5500 Form Data Tutorial

Finding Form 5500 Data

1. The first step to utilizing Form 5500 data is to click on *Search for Leads* on the Data Axle Genie homepage and then click on the *US Business Database*.
2. In *Filters*, scroll down to the *5500 Health and Welfare* filter on the left to filter by these categories: *Insurance Carrier, Agent/Broker, Participants, or Form Plan End Data*. Select the filter(s) you wish to use to add to your criteria selections.
3. To ensure that you are seeing all businesses, scroll to the *Records* filter and click on include *All Businesses*. You will include *Pre-Verified Business Records* in addition to *Verified business records*.
4. Then click *Run Search* to see your results.
5. Double click or click *Details* on a record you're interested in to view the company's profile, then select *5500 Health and Welfare* on the right profile menu to view the information.

As an Example, Here's How to Search by Agent/Broker:

1. Click on the *Agent/Broker* selection and search, by name, for the broker you are looking to target.
2. Scroll up to the *Geography* filter on the left and select your target area whether that be a *City, County, Zip Code, etc.*
3. You can also add more filters to find the exact type of records that you want.
4. When you are ready to see your results, simply click *Run Search* in the bottom right corner.
5. Among the results, click on a broker you're interested in and select *5500 Health and Welfare* on the right profile menu to view the information you're looking for.

Thank You for Using Data Axle Genie

For additional support or questions, contact your Aflac customer support team at 866-692-0262 or email aflachelp@data-axle.com