AGENT CONNECT TUTORIAL

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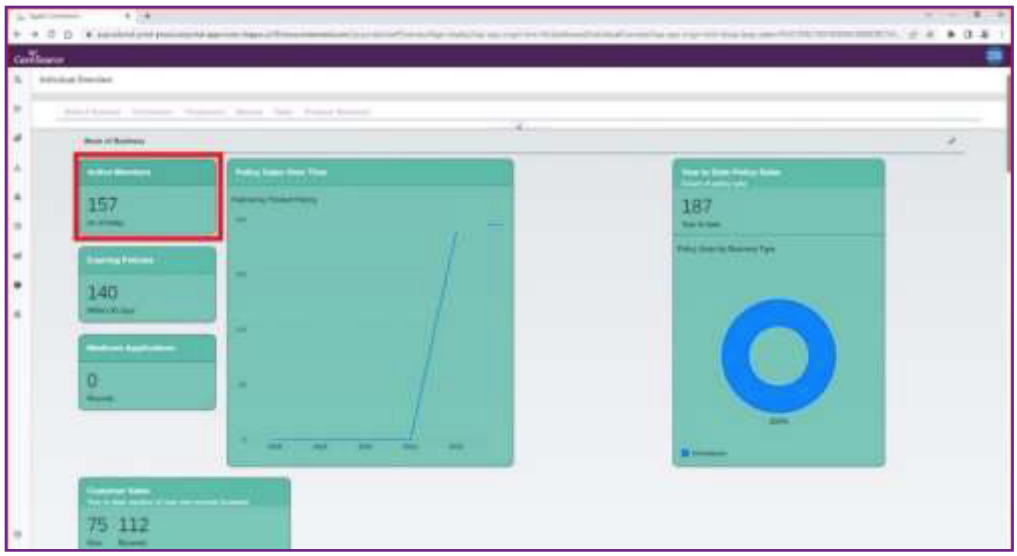
ACTIVE MEMBERS

The Active Members Card will list the total number of current active members.

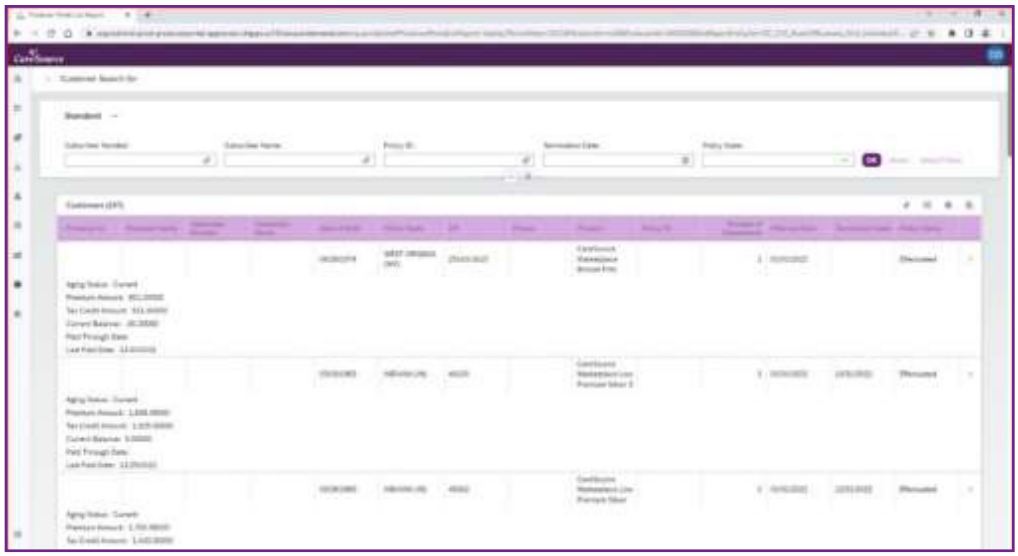
To access your **Active Members Details**:

- Click on the **Active Members Card**. The example below shows 157 Active members.



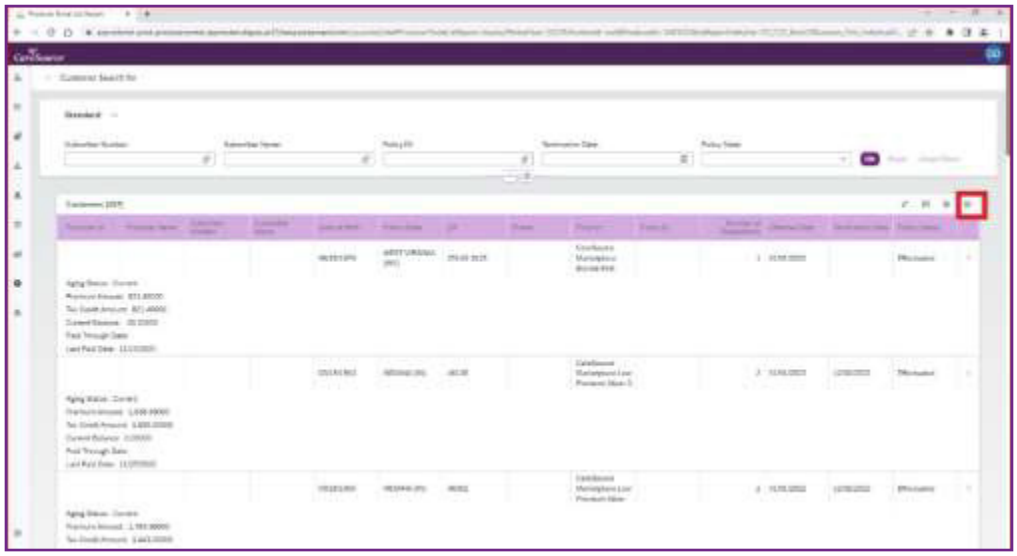
By clicking on the **Active Members Card**, the system will allow you to view each member's detail.

Example below shows the member detail.



To **Export your Active Members**, click on the export icon in upper right.

This will allow you to export all active members to an Excel spreadsheet.



Details will provide:

- Producer ID (NPN)
- Producer Name
- Subscriber (Member) ID
- Subscriber (Member) Name
- Members Date of Birth
- Policy State
- Members Zip Code
- Members Phone Number
- Product/Plan
- Policy ID
- Number of Dependents
- Effective Date
- Termination Date
- Policy Status

Clicking the arrow on far right of each **Members Line** will provide the following:

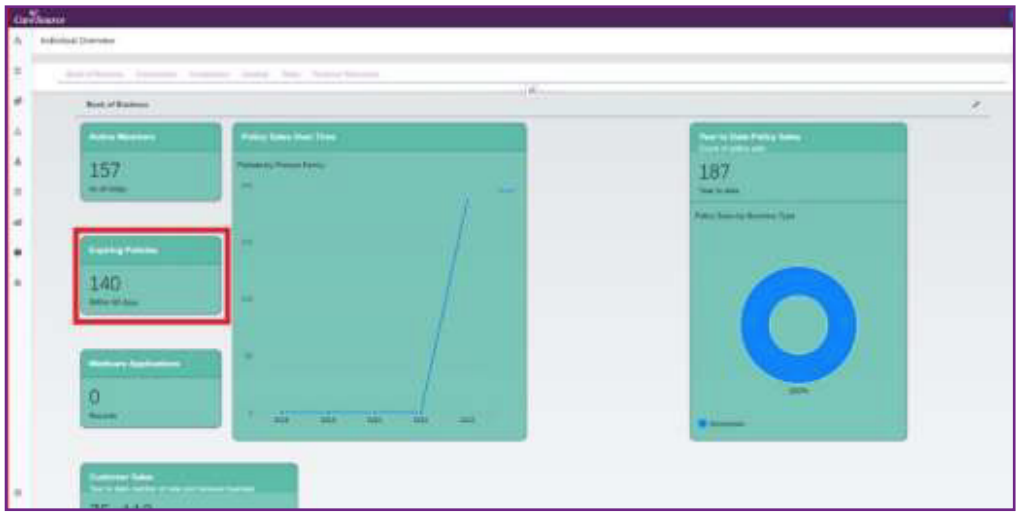
- Detail Dates: OED Date, Application Sign Date
- Product Information
- Member Demographics

EXPIRING POLICIES

The Expiring Policies Card will list the total number of members with expiring policies within the next 90 days.

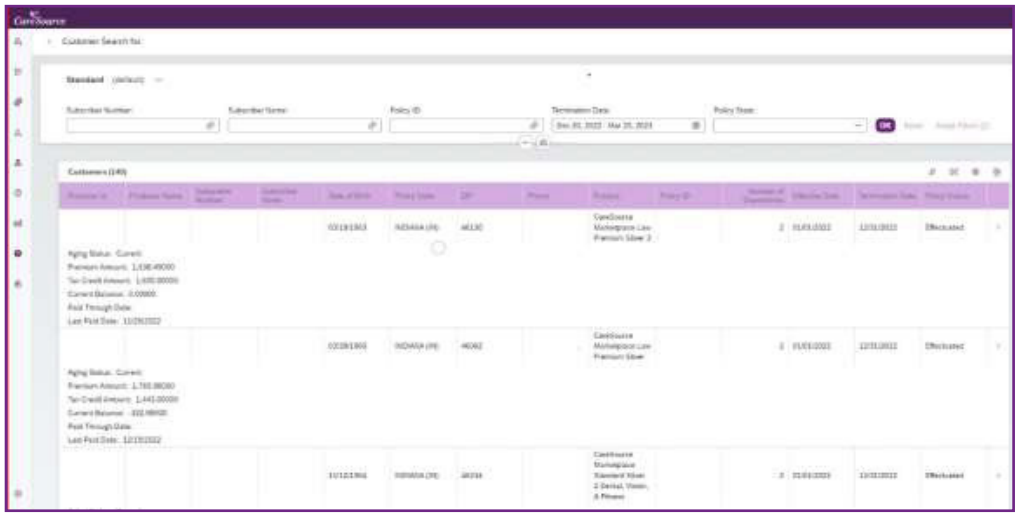
To Access your **Expiring Policies Details**:

- Click on the **Expiring Policies Details Card**. The example below shows 140 Expiring Policies



By clicking on the **Expiring Policies Card**, the system will allow you to view each member's detail.

Example below shows the member detail.



In the above example you can see policies expiring within 90 days of today's date (Dec 20, 2022).

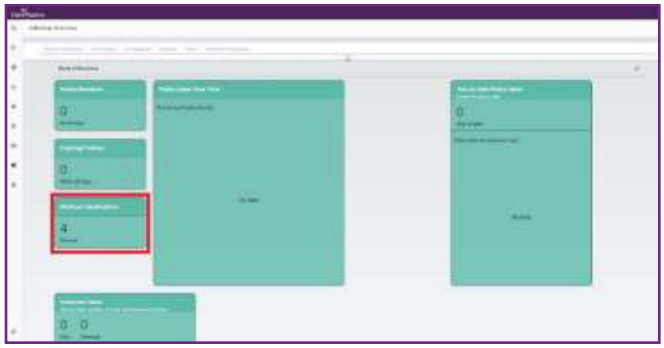
The three policies shown are expected to expire on 12/31/2022.

MEDICARE APPLICATIONS

The Medicare Applications Card will list the total number of current Medicare Applications.

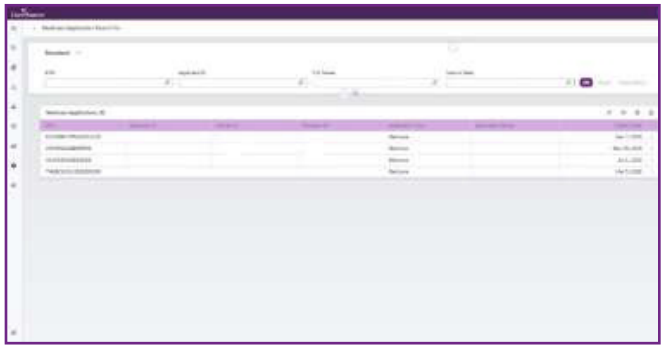
To access your **Medicare Applications Details**:

- Click on the **Medicare Applications**. The example below shows 4 Medicare Applications.



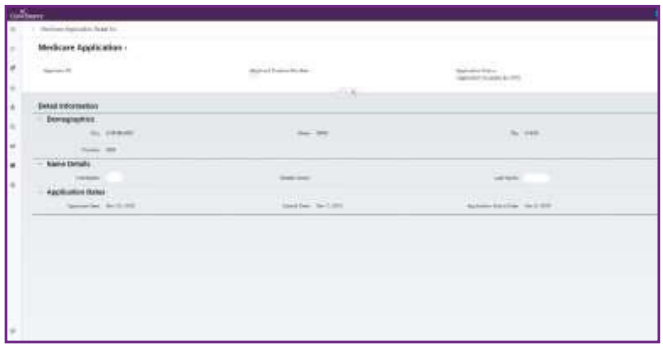
By clicking on the **Medicare Applications Card**, the system will allow you to view each member's detail.

Example below shows the Medicare member detail.



To view the details of any specific applicant, click anywhere within the desired applicant line.

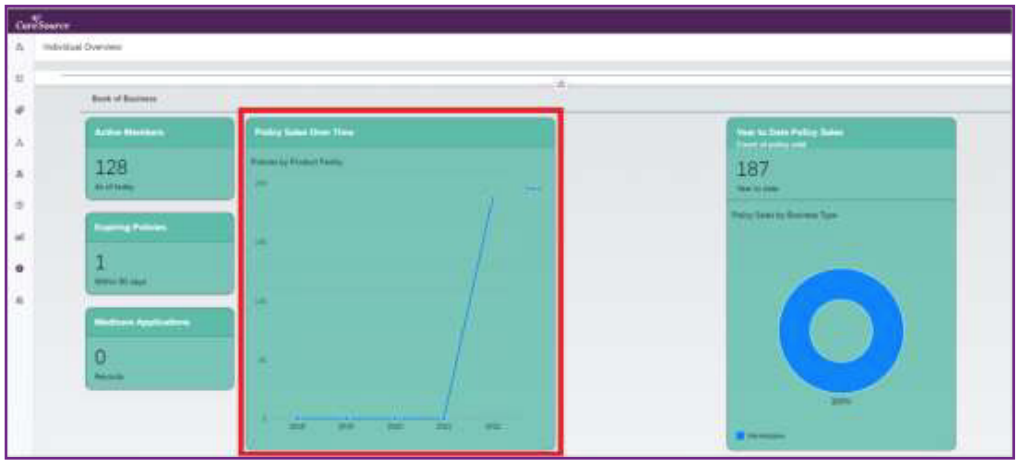
Example below shows details after clicking on the first applicant.



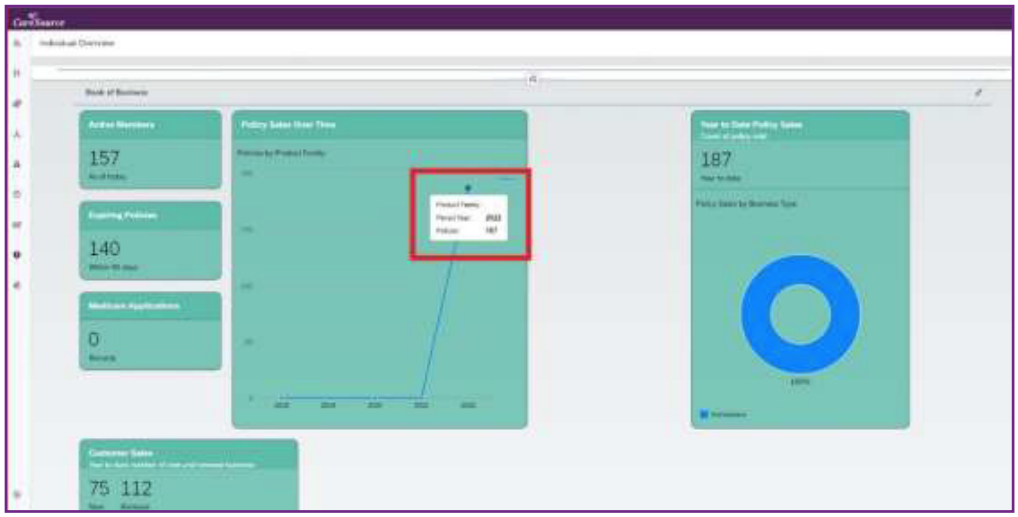
POLICY SALES OVER TIME

The Policy Sales Over Time Card provides policy sales per year.

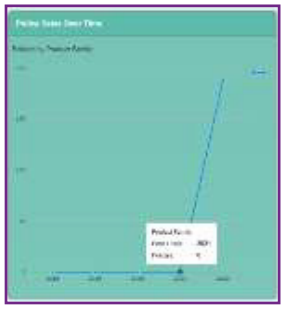
To access your **Policy Sales Over Time**, click on the card.

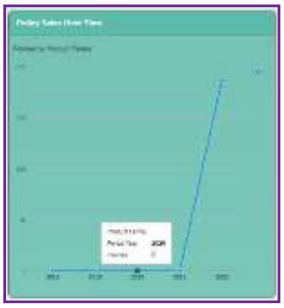


By hovering over the **Policy Sales Over Time Card**, the system will allow you to view number of policies for each calendar year.



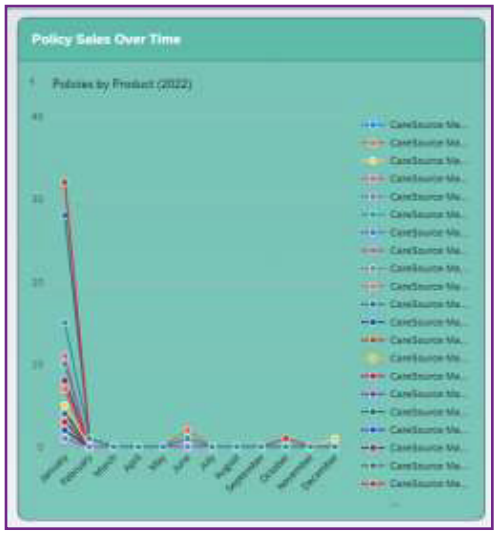
Examples below shows the policies for the calendar years 2021 and 2020.





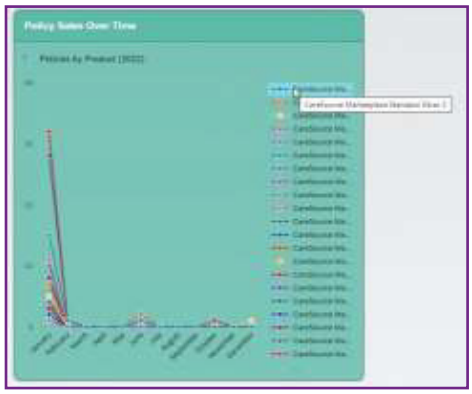
Click on the specific year to provide further details for that year.

The example below shows plan details for 2022.



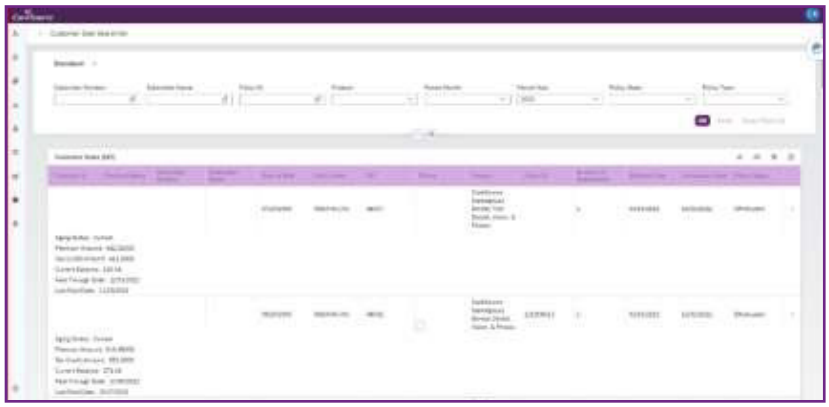
By hovering over each entity on far right of card, the system will display the **Marketplace Plan**.

Example below shows CareSource Marketplace Standard Silver 2.



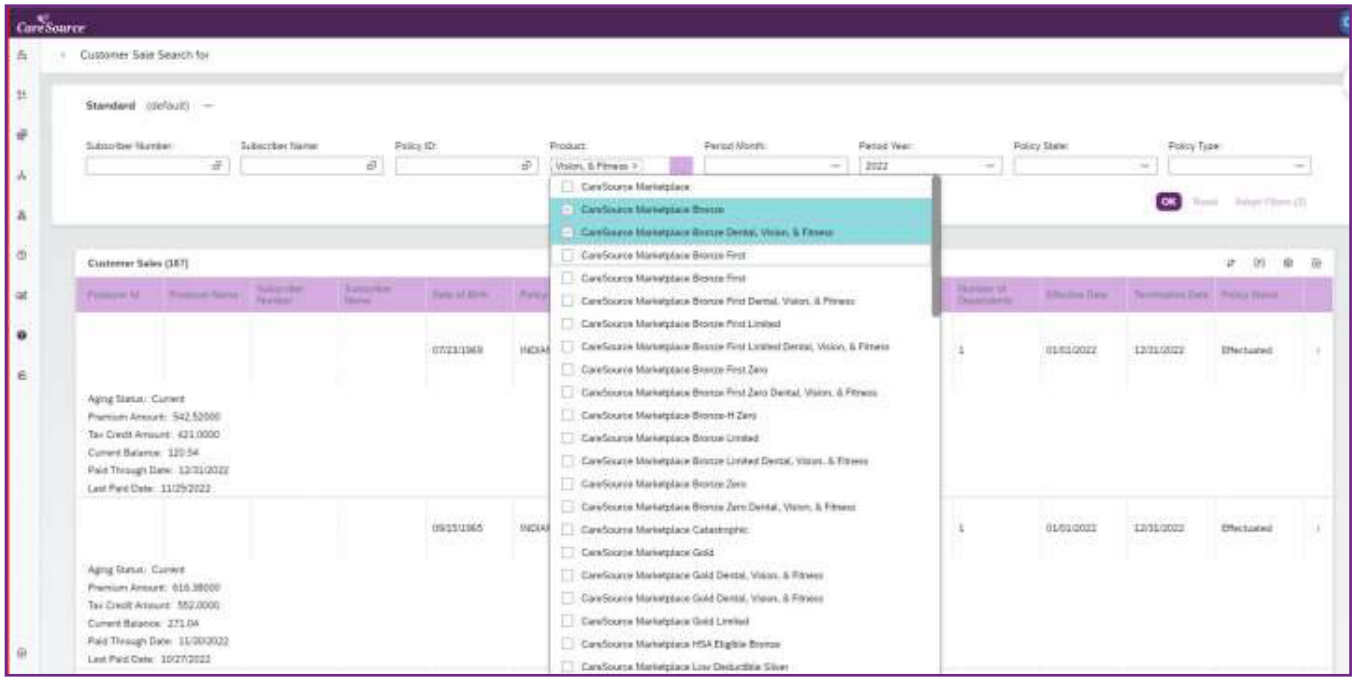
By clicking on the **Policy Sales Over Time Card**, the system will allow you to view each member's plan detail.

Example below shows the member plan detail.

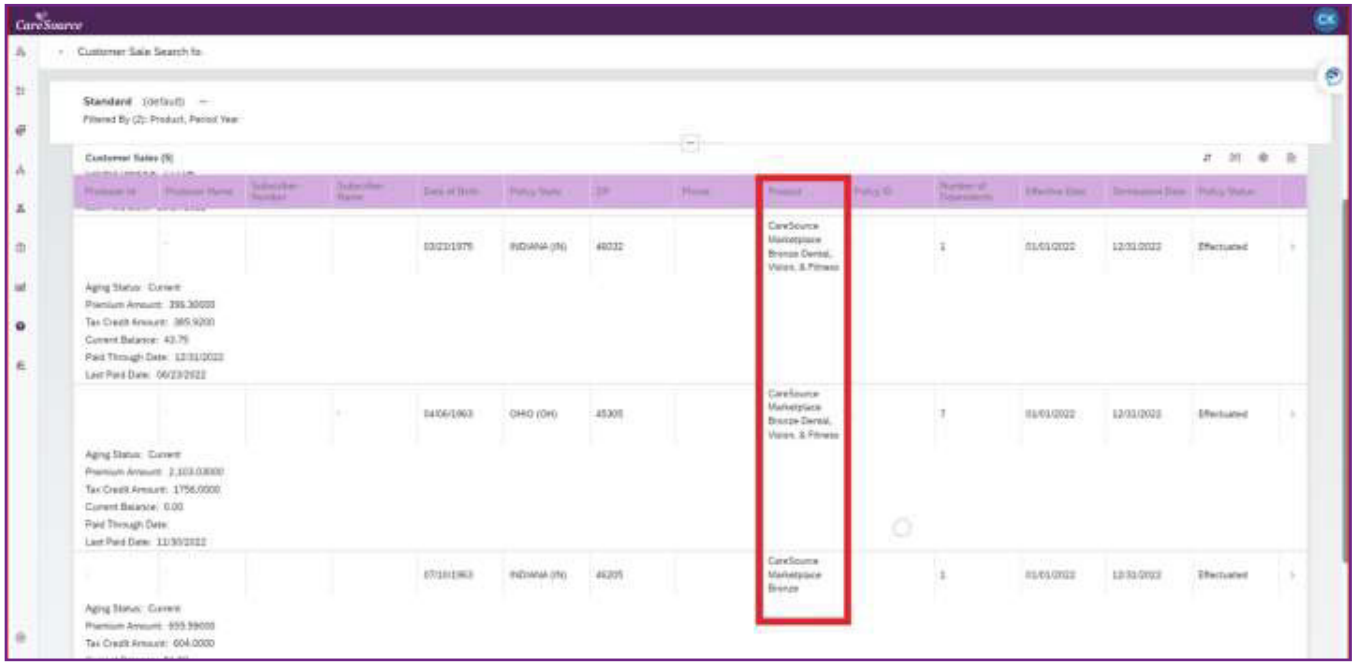


To filter and view specific plans, you may filter by product.

The example below shows filtering for CareSource Marketplace Bronze and Bronze DVF.



The example below shows the results of filtering for CareSource Marketplace Bronze and Bronze DVF.

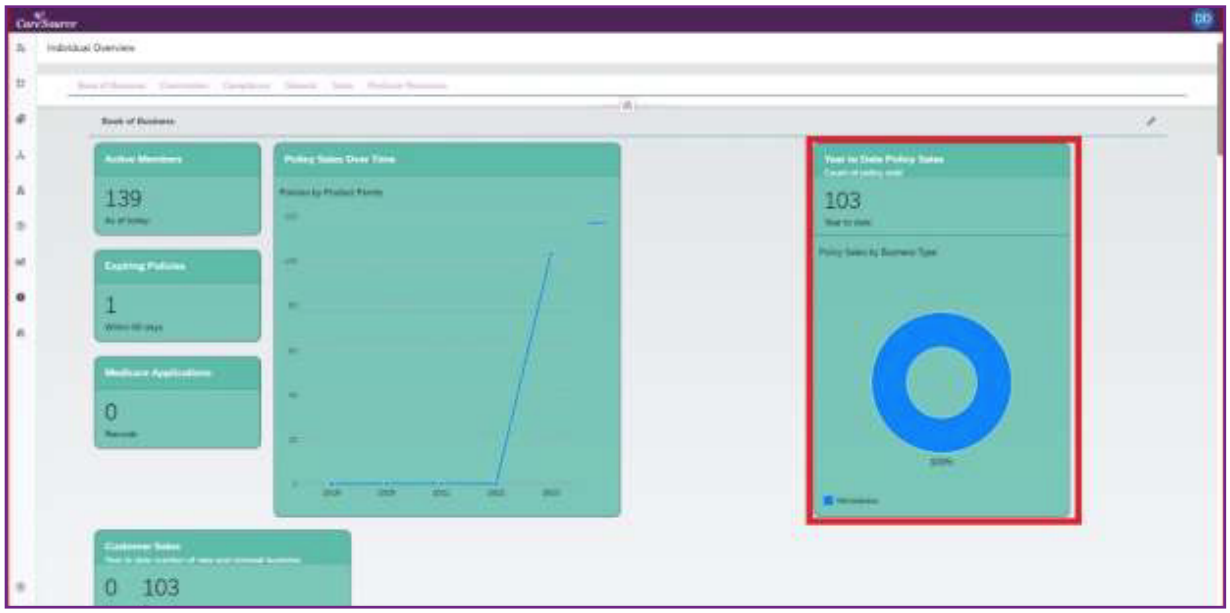


YEAR TO DATE POLICY SALES

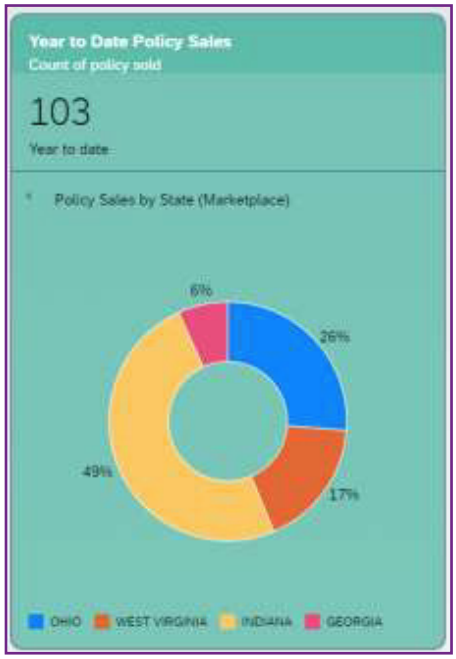
The Year to Date Policy Sales card will list your policy count for the current year.

To access your **Year to Date Policy Sales**:

- Click on the **Year to Date Policy Sales**. The example below shows 103 policies sold.

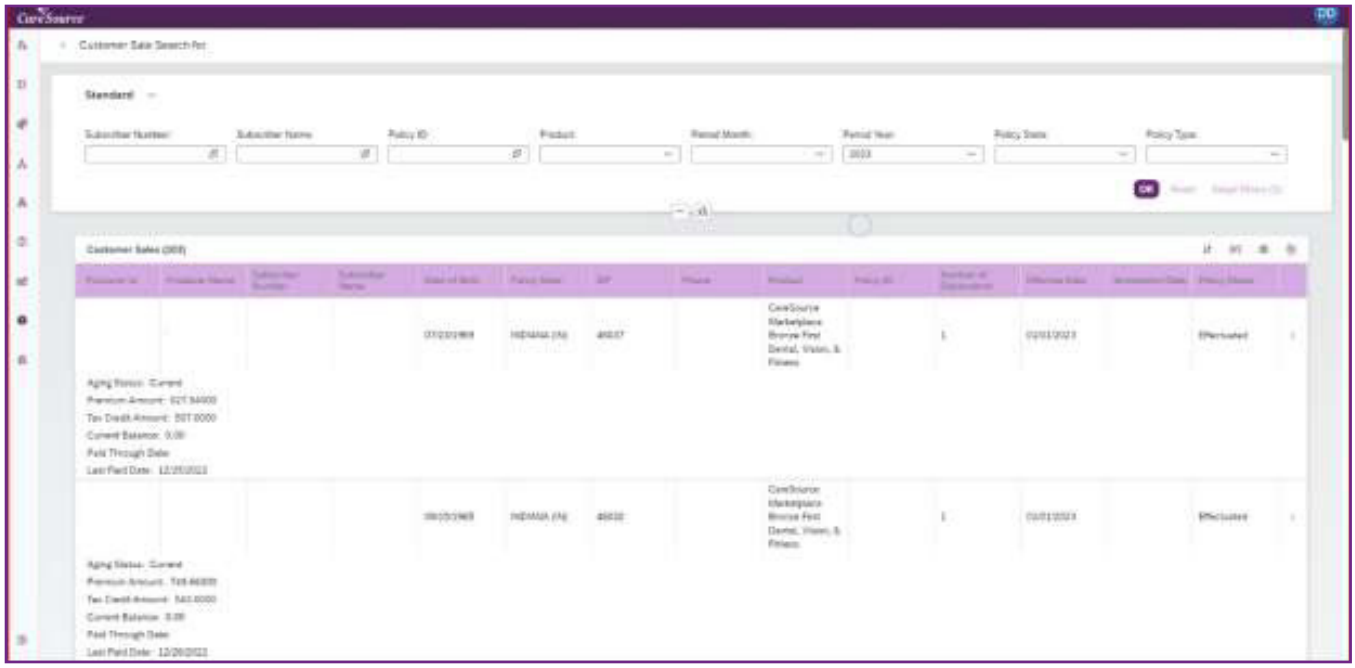


By clicking on the either the blue pie chart, or the word “Marketplace”, you can see the **Year to Date Policy Sales** by state:



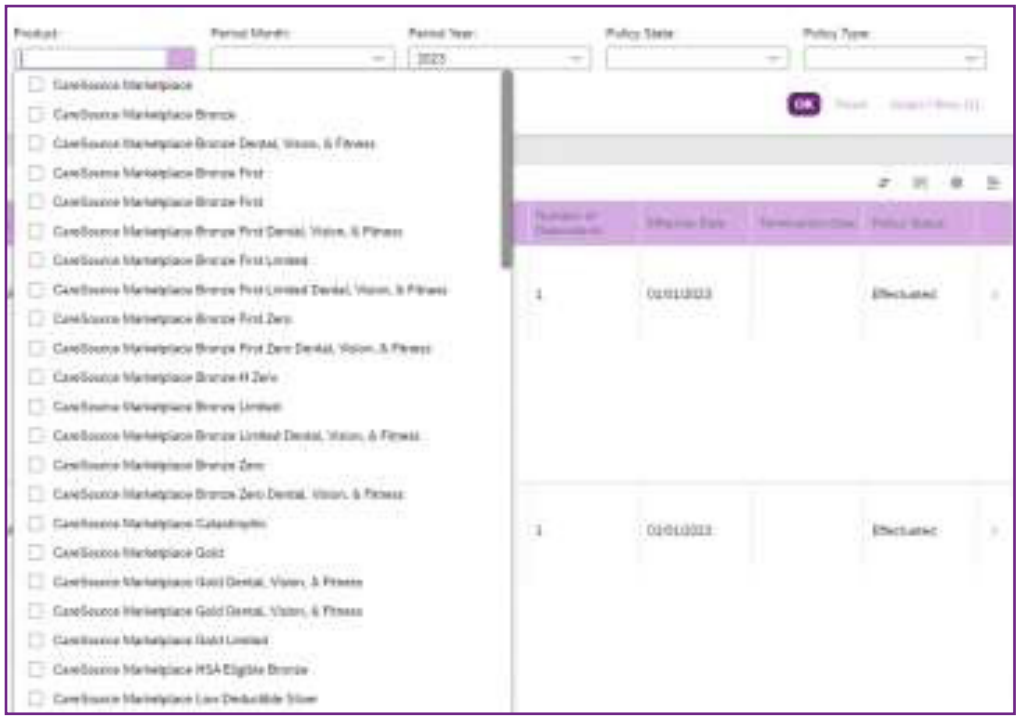
By clicking on the **Year to Date Policy Sales Card**, the system will allow you to view each member's detail.

Example below shows the member detail.



By using the provided dropdowns along the top of the screen, you may filter by Product, Period Month, Period Year, Policy State and Policy Type.

The example below shows the filter option for Products.



CUSTOMER SALES

The Customer Sales Card will list the number of new and renewal business by month.

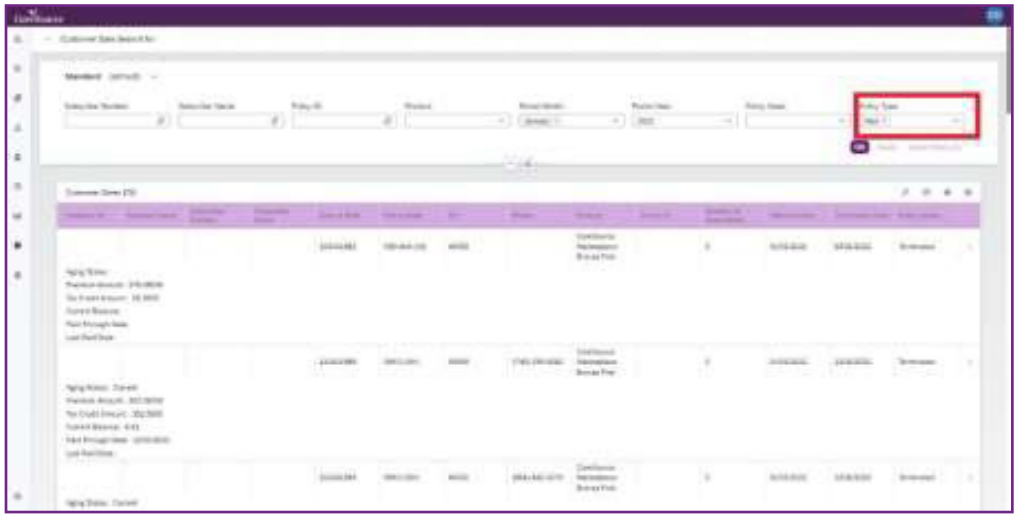
To access your **Customer Sales Detail**:

- Click on the **Customer Sales Card**. The example below shows 75 New and 112 Renewal. This will show all New and Renewal business detail for the calendar year.

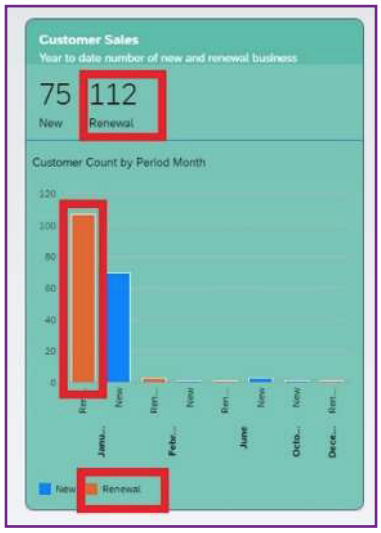
By clicking on any of the highlighted areas you can filter your search results.

In the example below, we are searching for New only.

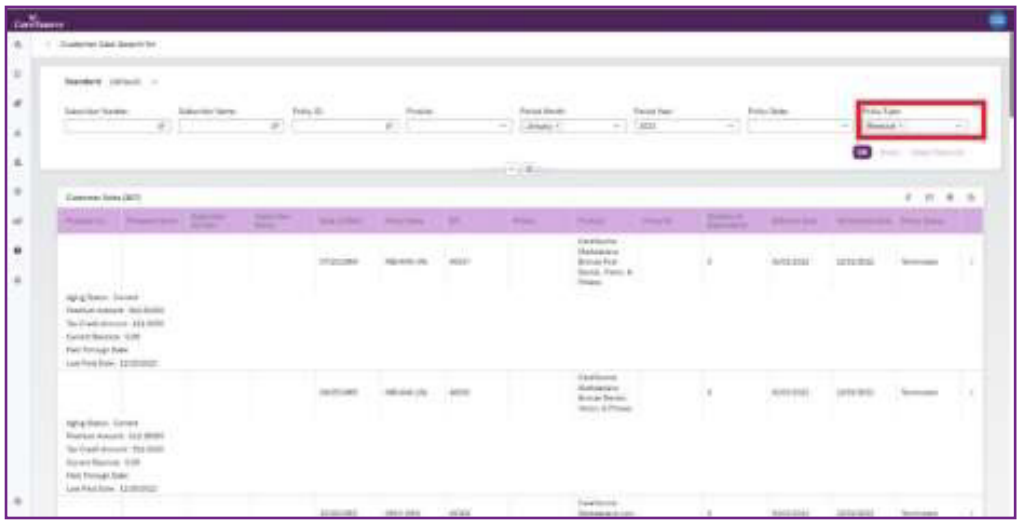
When clicking on **New**, the details are provided for all New Sales.



In the example below, we are searching for Renewal only.



When clicking on **Renewal**, the details are provided for all Renewal Sales.

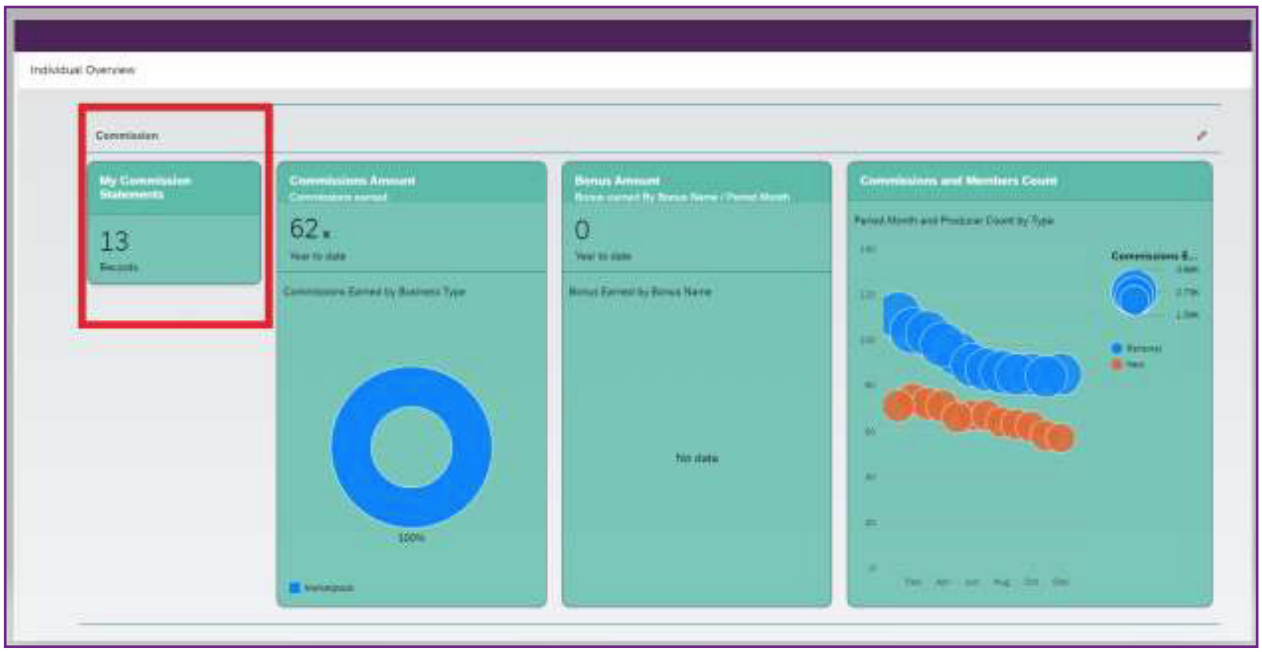


MY COMMISSION STATEMENTS

The Commission Statements Card will list the total number of current active members.

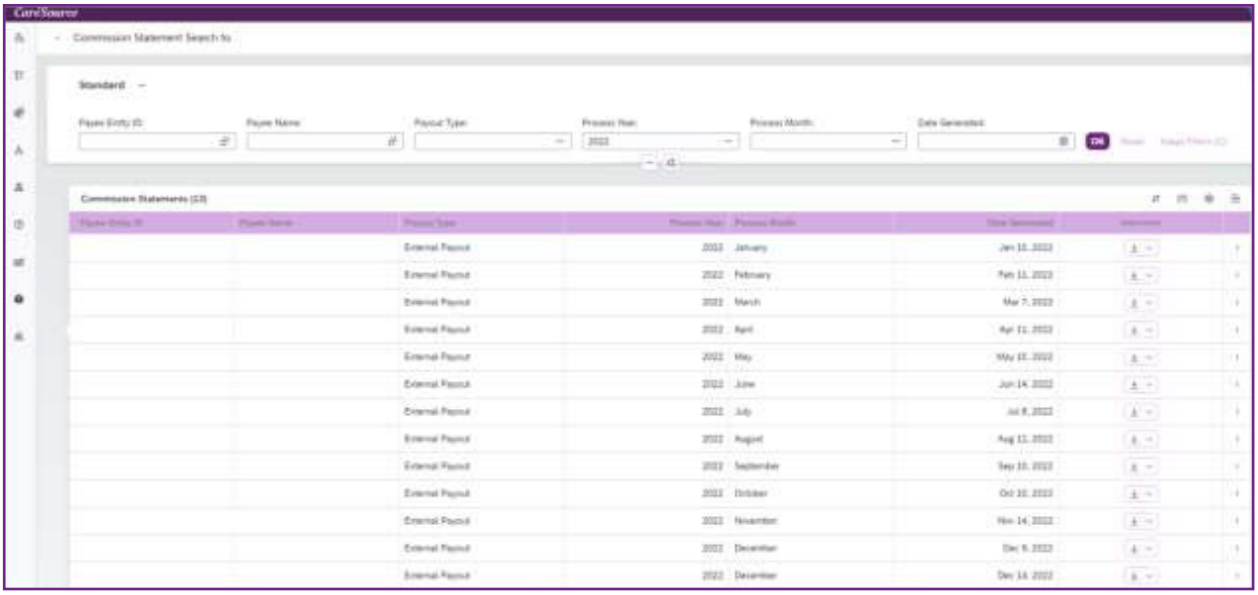
To access your **Commission Statements Details**:

- Click on the **My Commission Statements Card**. The example below shows 13 records.

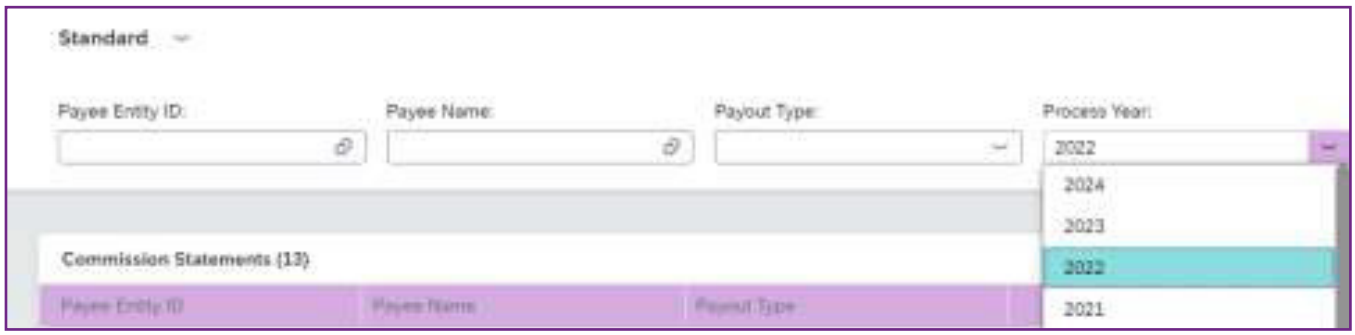


By clicking on the **My Commission Statements Card**, the system will allow you to view each commission statement.

Example below shows the commission statements by month.

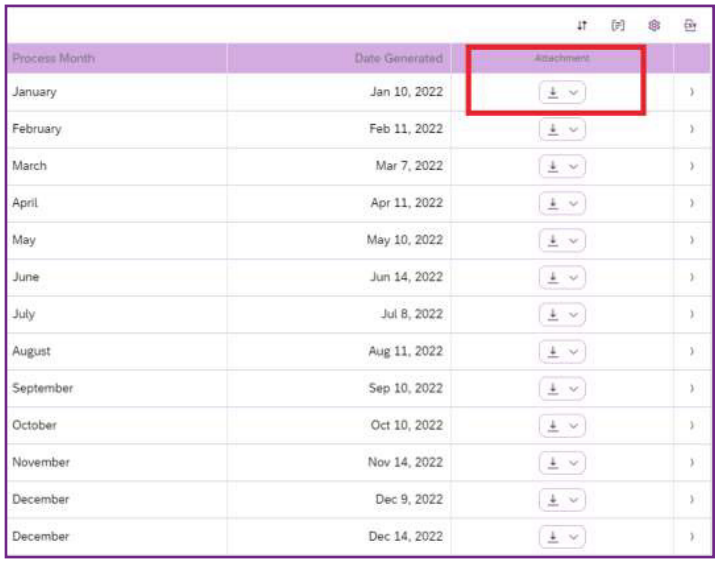


You may filter for a specific year by selecting the **Process Year** from the dropdown.



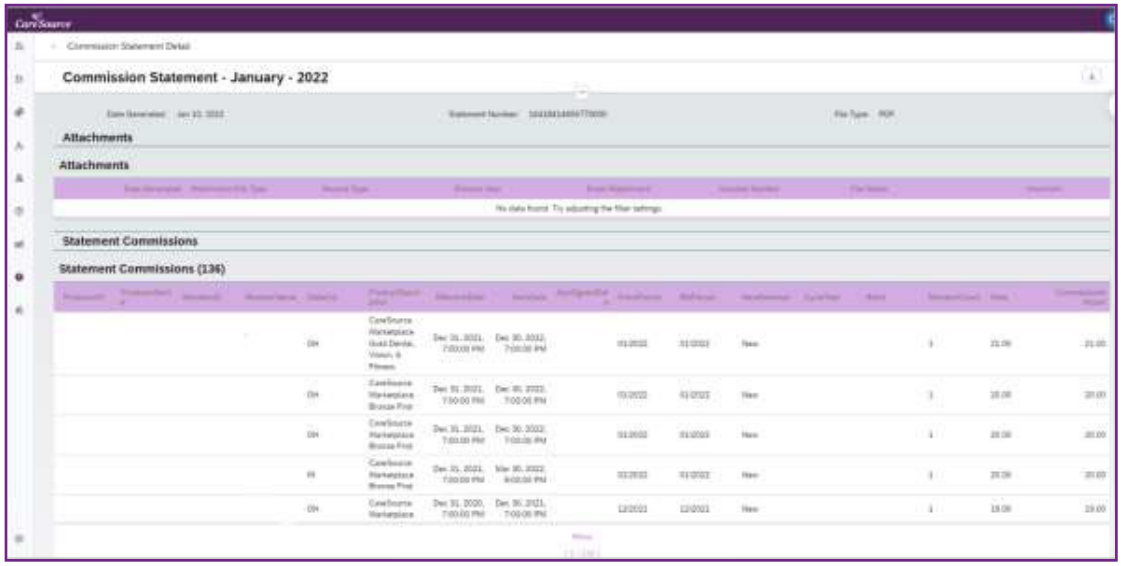
To **Export a Commission Statement**, click on the down arrow under attachments column.

This will allow you to export a specific month's statement.



Process Month	Date Generated	Attachment
January	Jan 10, 2022	
February	Feb 11, 2022	
March	Mar 7, 2022	
April	Apr 11, 2022	
May	May 10, 2022	
June	Jun 14, 2022	
July	Jul 8, 2022	
August	Aug 11, 2022	
September	Sep 10, 2022	
October	Oct 10, 2022	
November	Nov 14, 2022	
December	Dec 9, 2022	
December	Dec 14, 2022	

By clicking anywhere on a specific line/month, the system will open that statements detail.

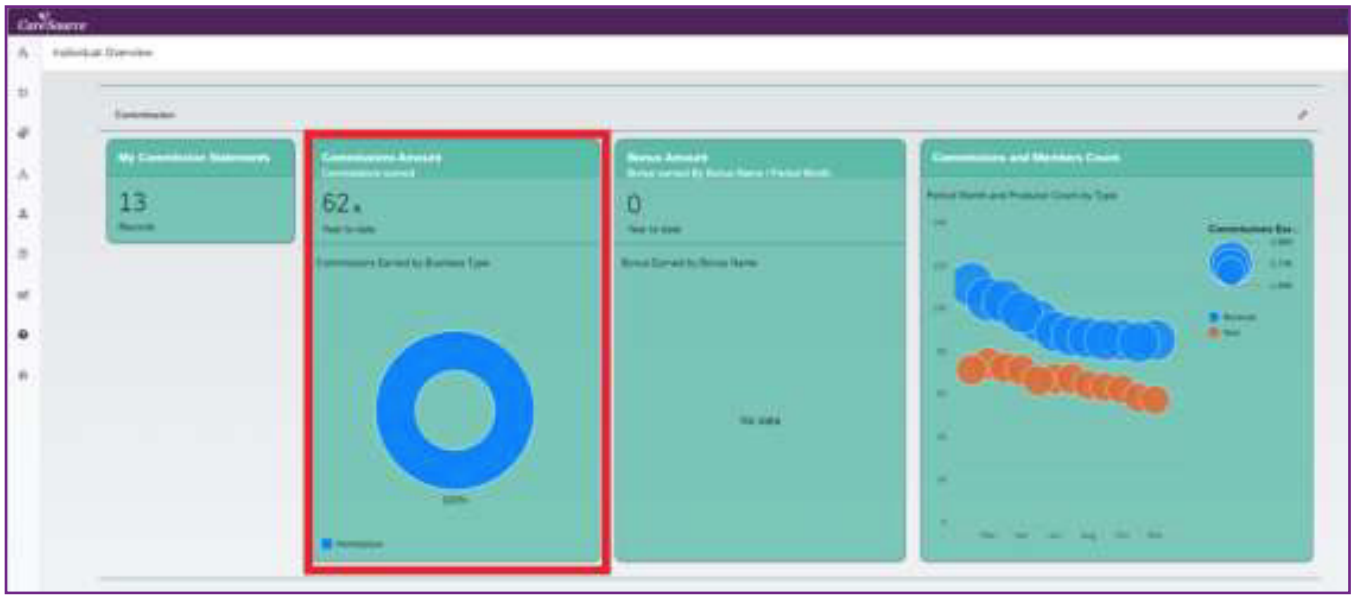


COMMISSION AMOUNT

The Commission Amount Card will list the total of current Commissions earned.

To access your **Commission Amount Details**:

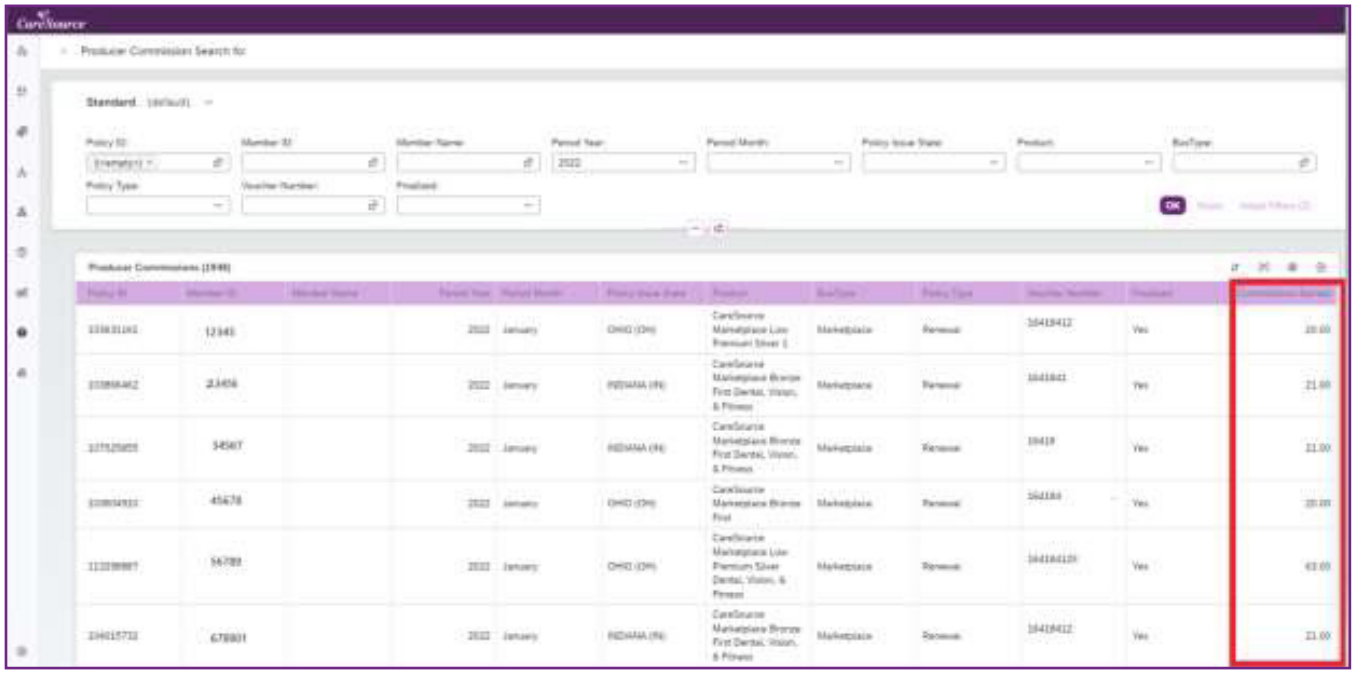
- Click on the **Commission Amount Card**. The example below shows 62k year to date.



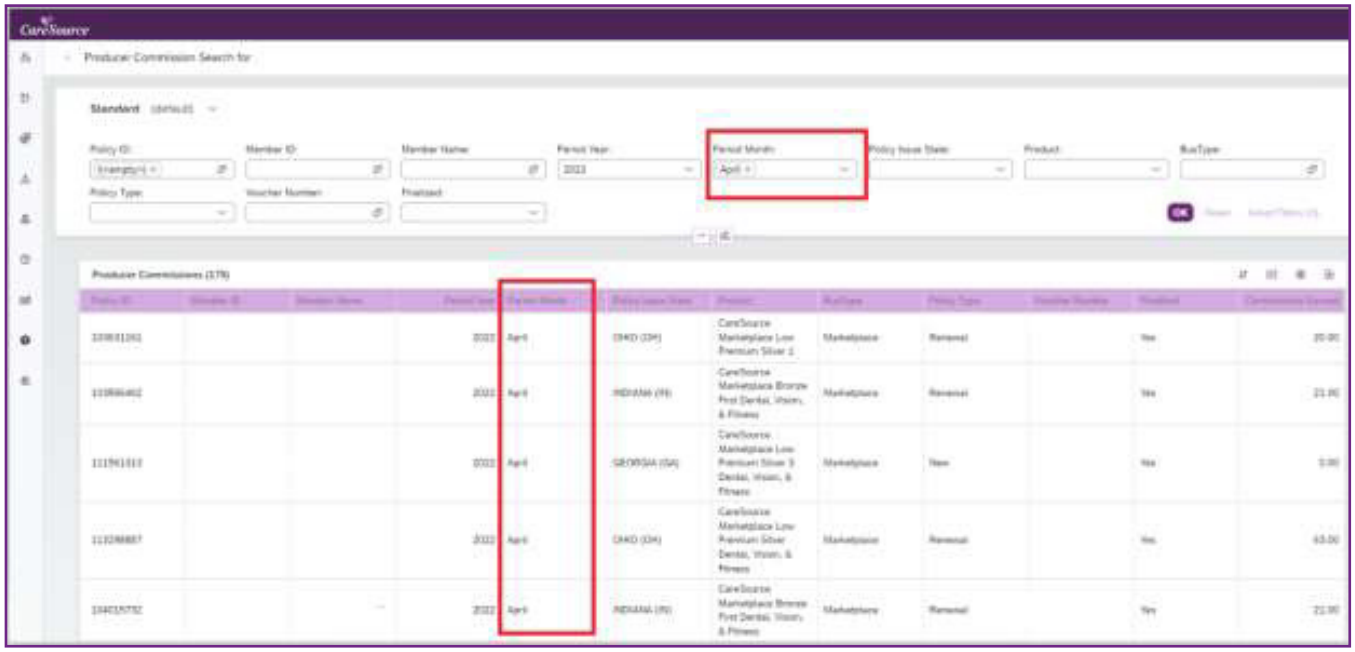
By hovering over the graph, you can see the **Business Type** and the total commission amount.

By clicking on the **Commission Amount Card**, the system will allow you to view commission detail.

Example below shows the commission detail.



The example below shows the filtering option for Period Month April.



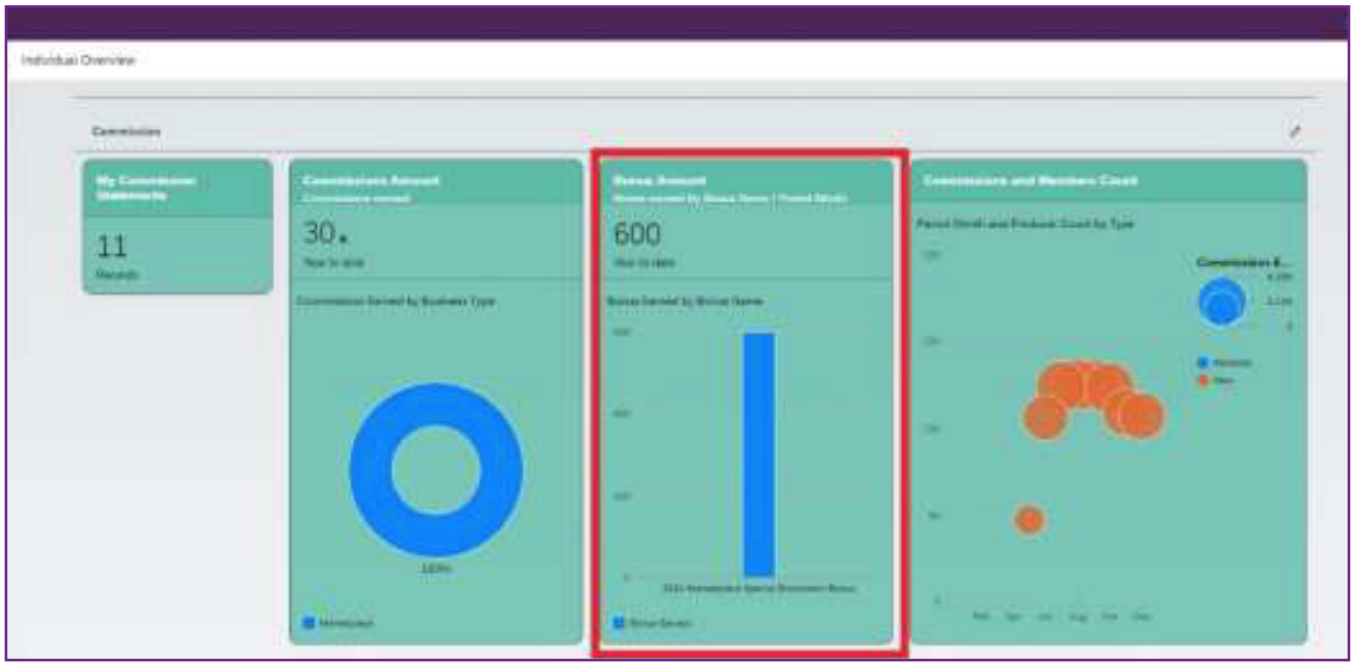
PHI has been removed.

BONUS AMOUNT

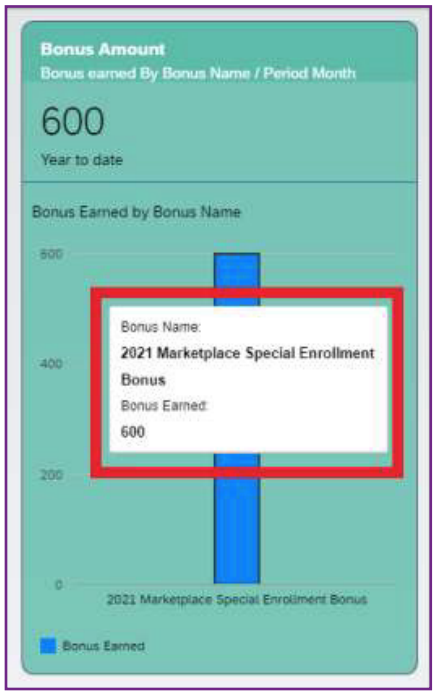
The Bonus Amount Card will provide Bonus earned by Bonus Name and Period Month.

To access your **Bonus Amount Details**:

- Click on the **Bonus Amount Card**. The example below shows 600.

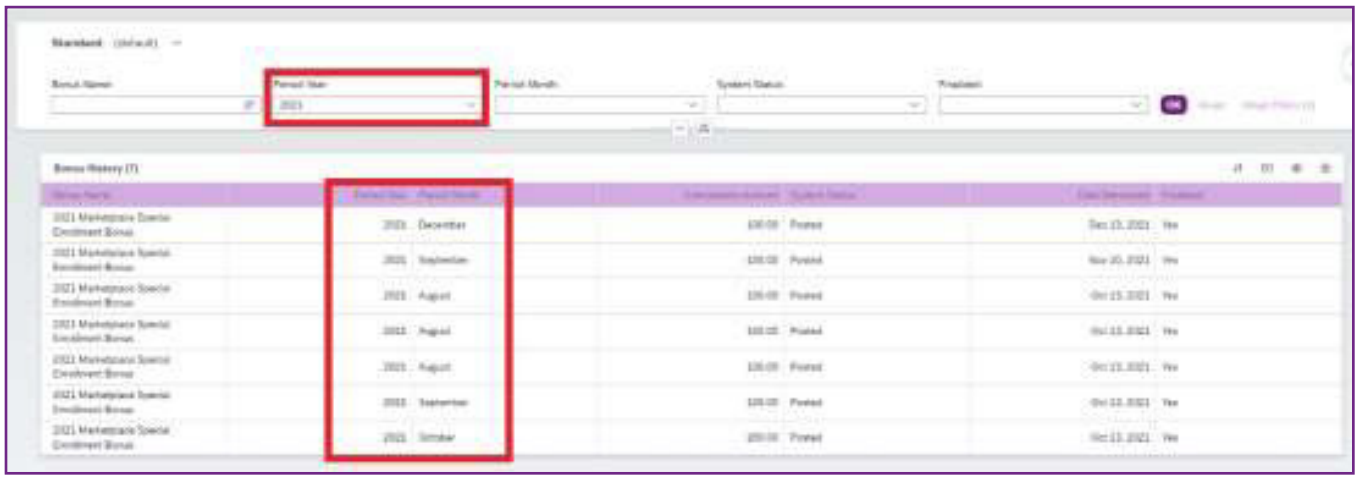


By hovering over the graph, the system will provide the current Bonus name and Bonus Earned.

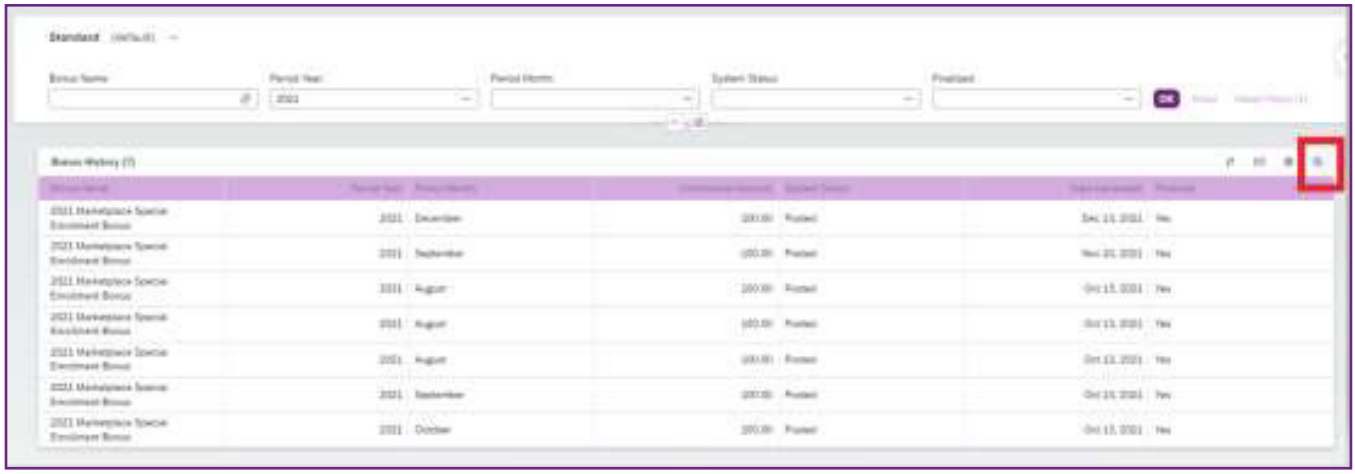


By clicking on the **Bonus Amount Card**, the system will allow you to view each Bonus.

Example below shows the Bonus History.



To export a specific month, click on the export icon on upper right of screen.



A CVS file will be generated.

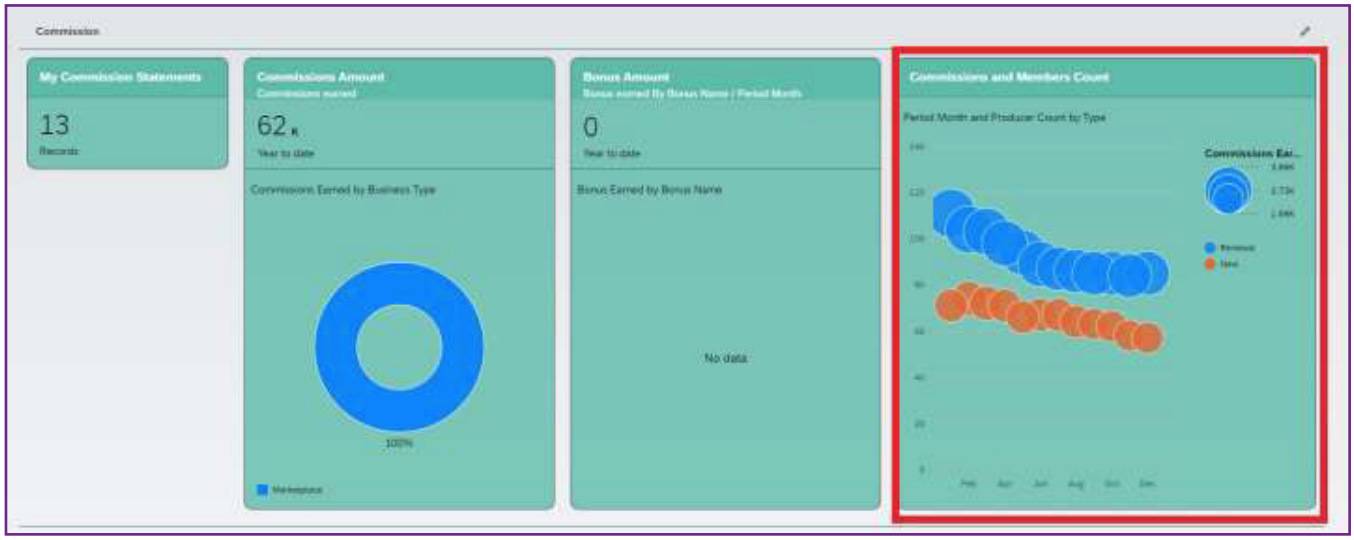
	A	B	C	D	E	F	G
1	Bonus Name	Period Ye	Period Month	Commission Amoun	System Status	Date Generated	Finalized
2	2021 Marketplace	2021	December	100	Posted	Dec 13 2021	Yes
3	2021 Marketplace	2021	September	-100	Posted	Nov 10 2021	Yes
4	2021 Marketplace	2021	August	100	Posted	Oct 13 2021	Yes
5	2021 Marketplace	2021	August	100	Posted	Oct 13 2021	Yes
6	2021 Marketplace	2021	August	100	Posted	Oct 13 2021	Yes
7	2021 Marketplace	2021	September	100	Posted	Oct 13 2021	Yes
8	2021 Marketplace	2021	October	200	Posted	Oct 13 2021	Yes
9							

COMMISSIONS AND MEMBERS COUNT

The Commissions and Members Count Card will list the Commissions and Members Count per month by plan type.

To access your **Commissions and Members Count Details**:

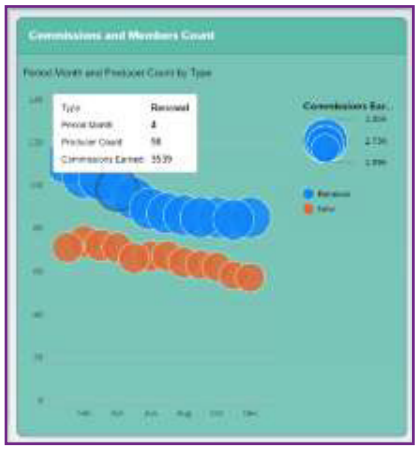
- Click on the **Commissions and Members Count Card**.

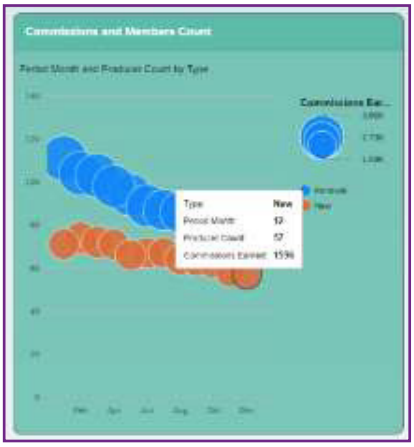


By hovering over the card, you can view specific month information at a glance.

Blue = Renewal
Orange = New

The examples below show a Renewal Member Count for April and a New Member count for December.

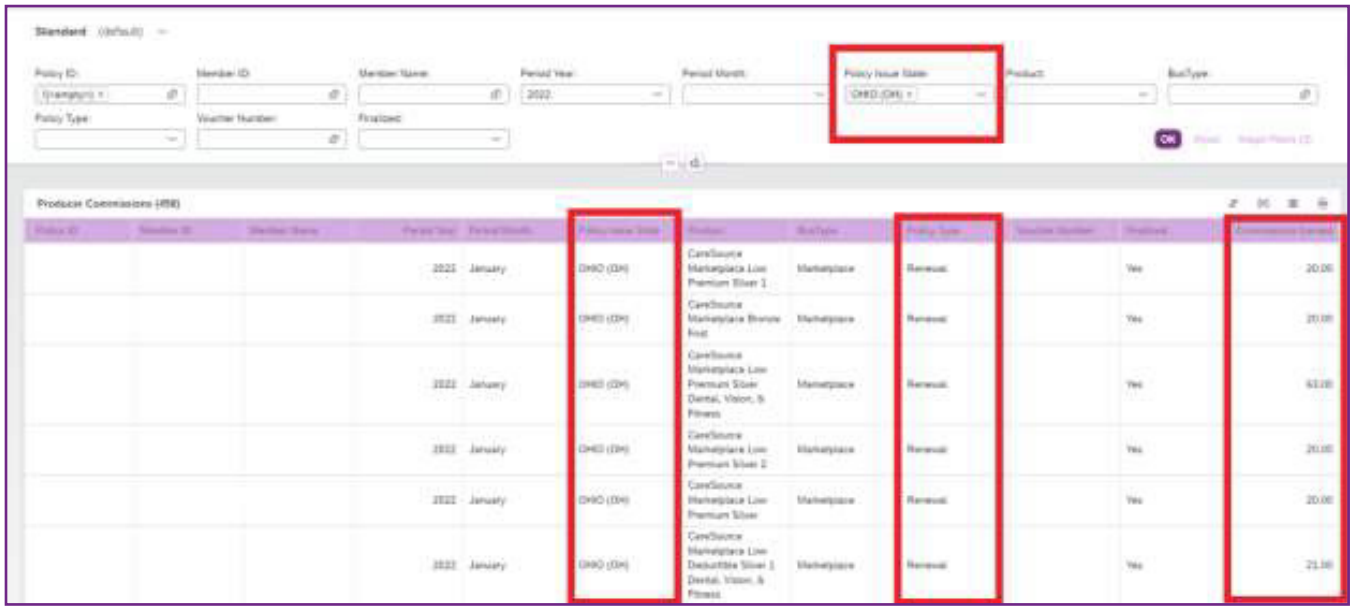




By clicking on the **Commissions and Members Count Card**, the system will allow you to view Commissions and Member Count detail.

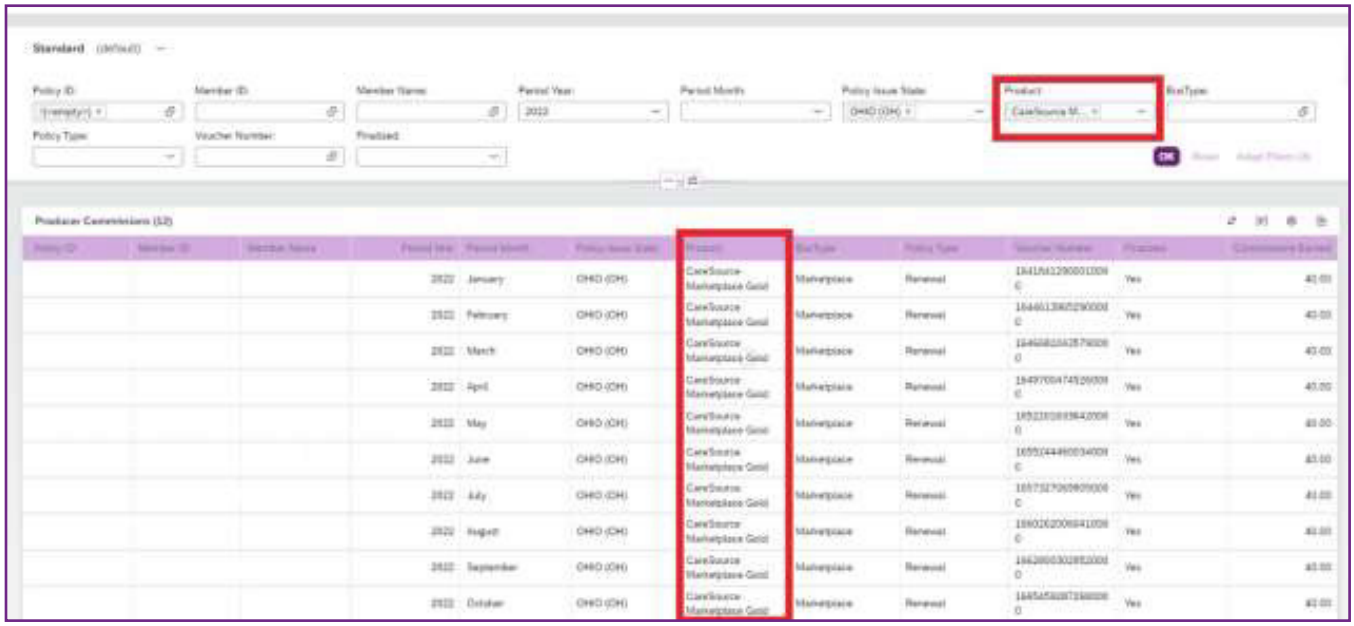
Example below shows the Commissions and Member Count detail. It has been filtered for OHIO only.

- If no specific month is selected in the dropdown box, it will include every month starting at January.



By selecting the **Product** from the dropdown, you can view every member for one specific product.

The example below shows CareSource Marketplace Gold in Ohio for 2022. Each member is listed for each month.



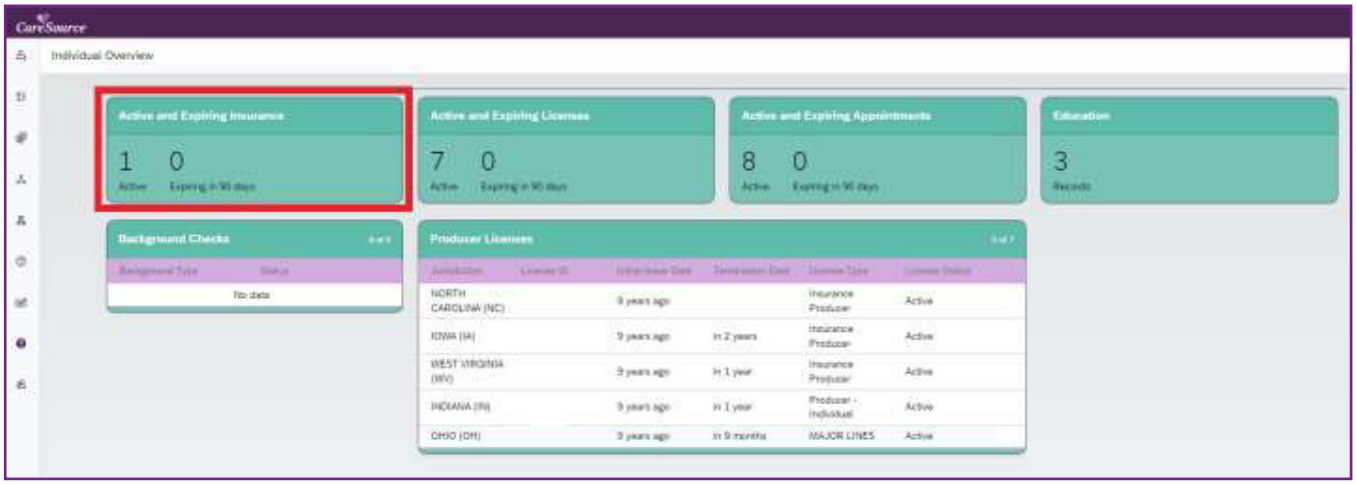
PHI and HIPPA has been removed.

ACTIVE AND EXPIRING INSURANCE

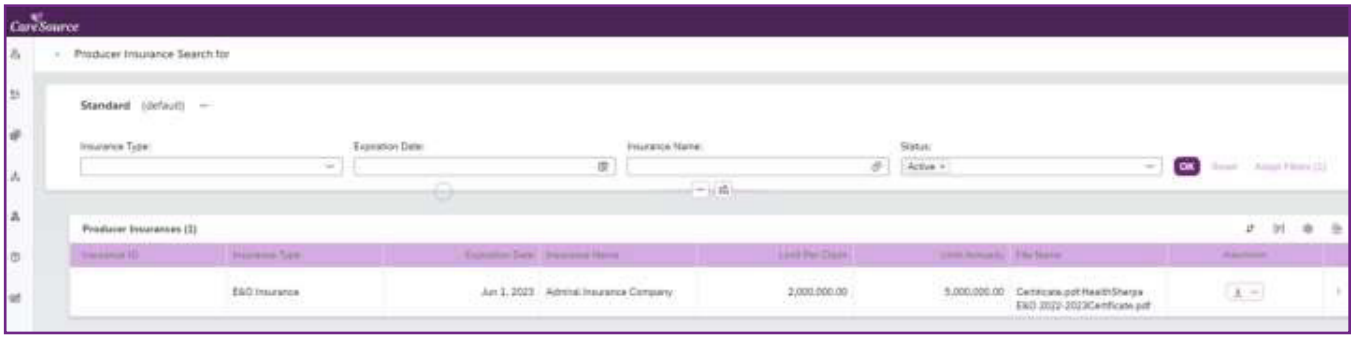
The Active and Expiring Insurance Card will list the total number of Active Insurance and Insurance Expiring in 90 days.

To access your **Active and Expiring Insurance Details**:

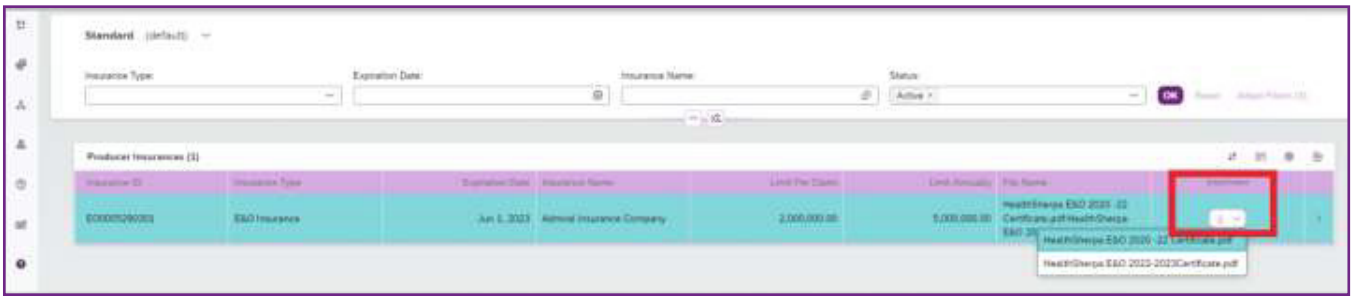
- Click on the **Active and Expiring Insurance Card**. The example below shows 1 Active Insurance.



By clicking on the **Active and Expiring Insurance Card**, the system will allow you to view details.



By clicking on the **Attachments** icon, you can select and view documents.

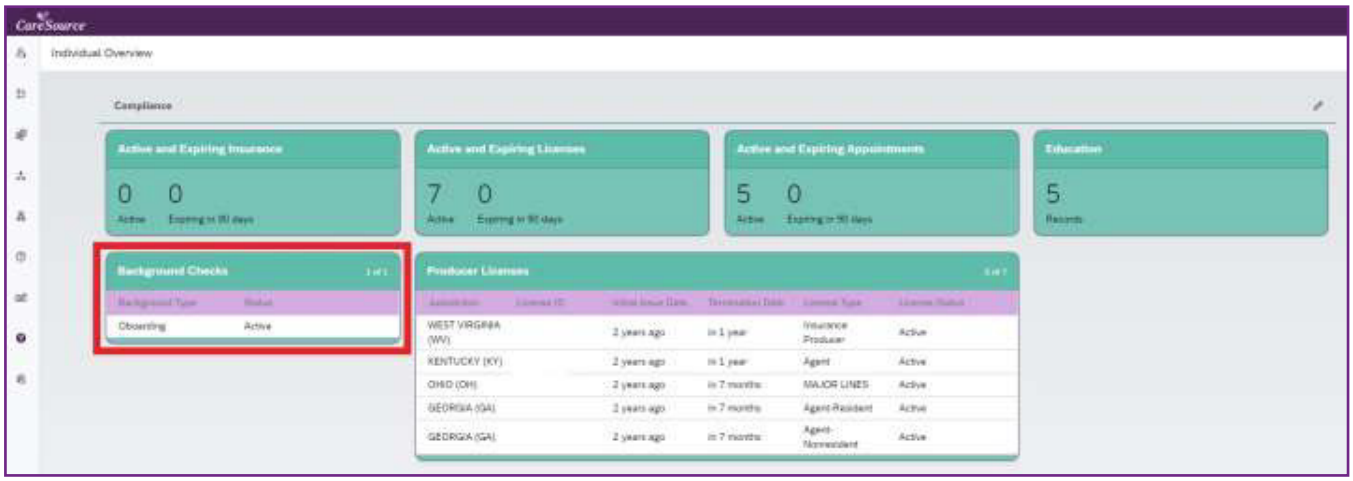


BACKGROUND CHECKS

The Background Checks Card will list Background type and status.

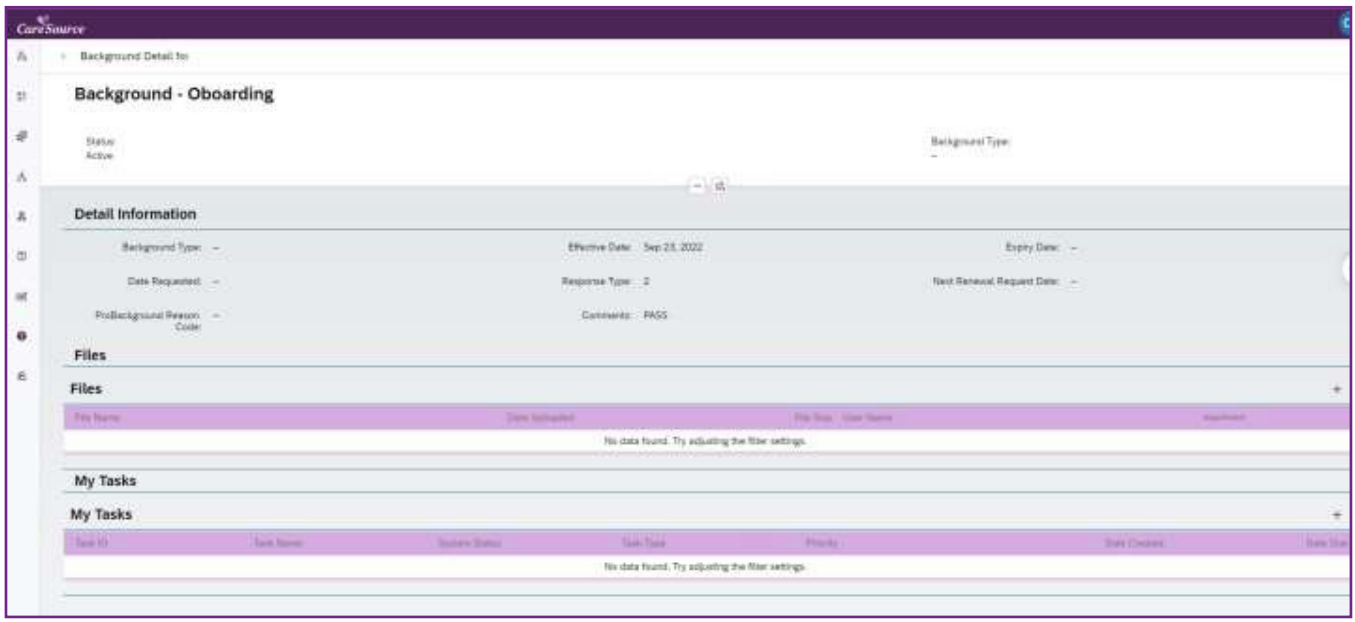
To access your **Background Checks Details**:

- Click on the **Background Checks Card**. The example below shows 1 Background Check.



By clicking on the **Background Checks Card**, the system will allow you to view Background Check detail.

Example below shows the Background detail.

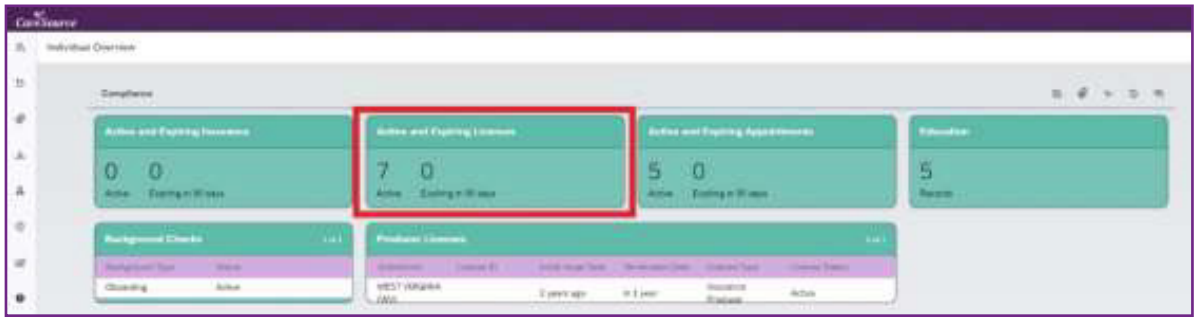


ACTIVE AND EXPIRING LICENSES

The Active and Expiring Licenses Card will list the total number of Active Licenses and Licenses Expiring in 90 days.

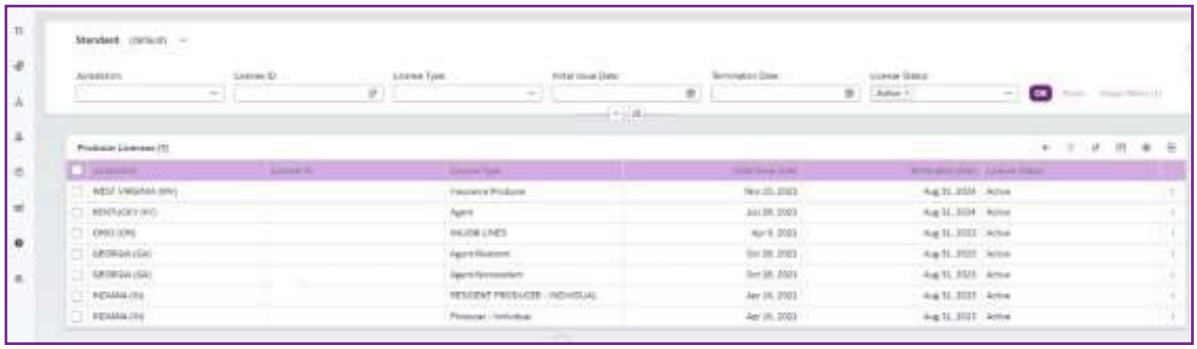
To access your **Active and Expiring Licenses Details**:

- Click on the **Active and Expiring Licenses Card**. The example below shows 7 Active Licenses.

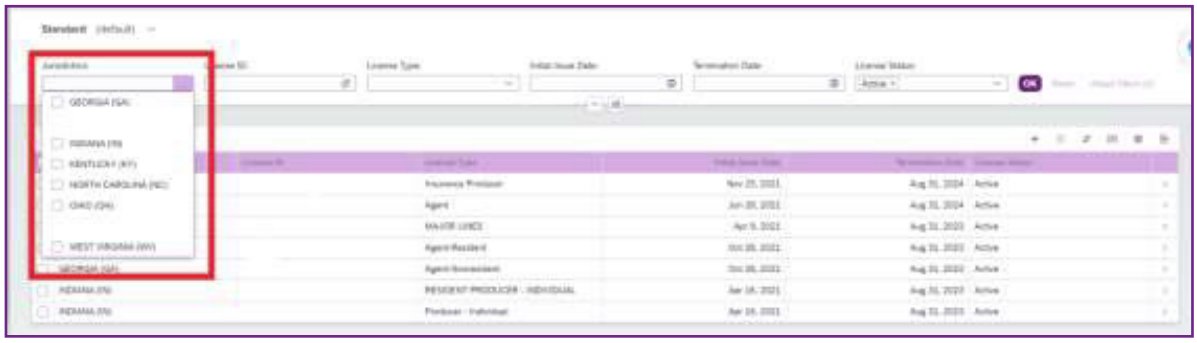


By clicking on the **Active and Expiring Licenses Card**, the system will allow you to view license detail.

Example below shows the license detail.



To filter by state, select from the **Jurisdiction** dropdown.



ACTIVE AND EXPIRING APPOINTMENTS

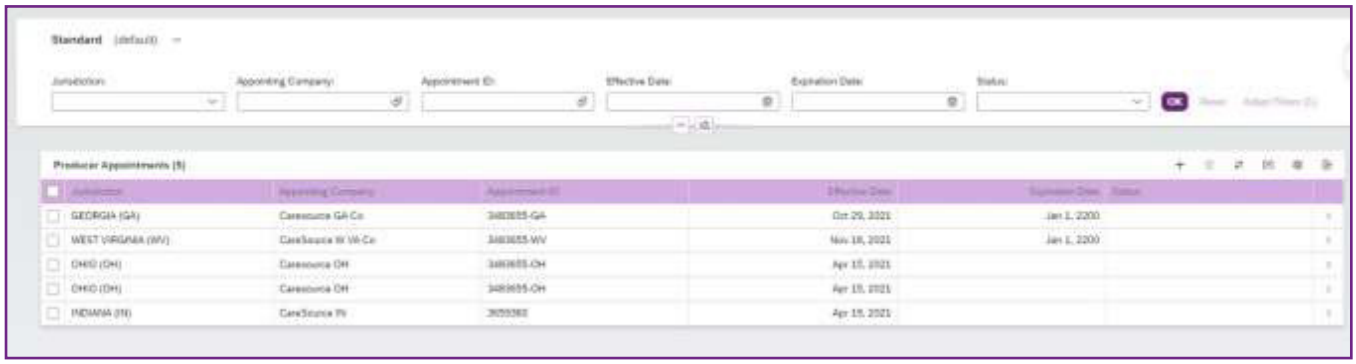
The Active and Expiring Appointments Card will list the total number of current active members.

To access your **Active and Expiring Appointments Details**:

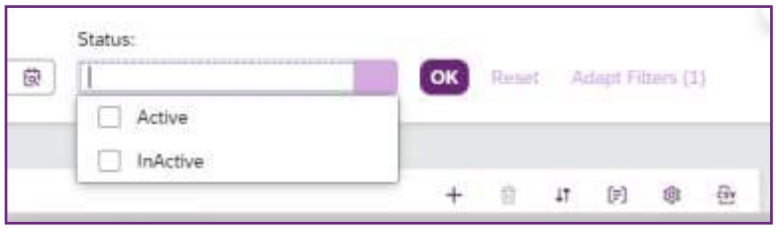
- Click on the **Active and Expiring Appointments Card**. The example below shows 5 Active appointments and zero Expiring appointments.

By clicking on the **Active and Expiring Appointments Card**, the system will allow you to view each appointment detail.

Example below shows the appointment detail.



By selecting **Active** or **InActive** in the dropdown, you can filter for each specific detail.

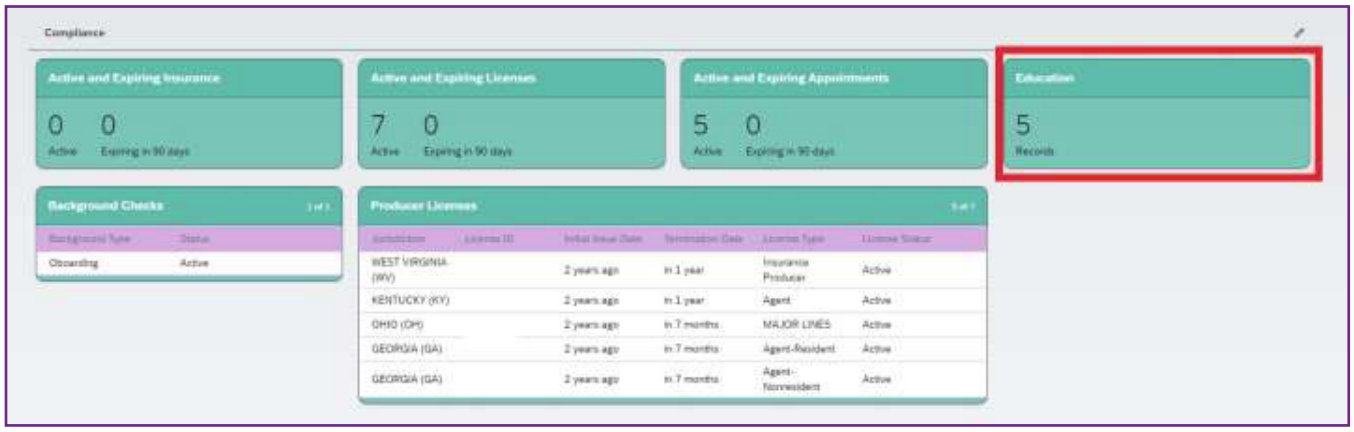


EDUCATION

The Education Card will list the total number of Certifications.

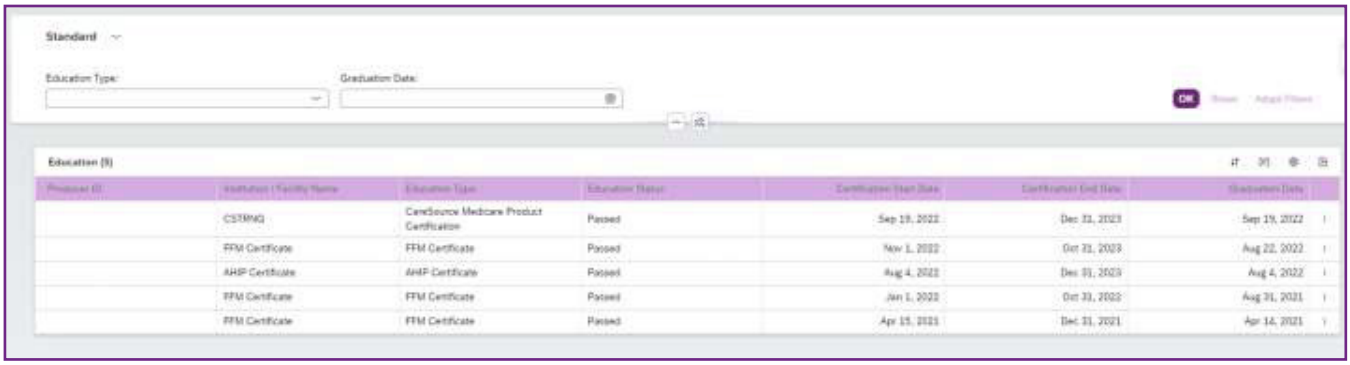
To access your **Education Details**:

- Click on the **Education Card**. The example below shows 5 Certifications.



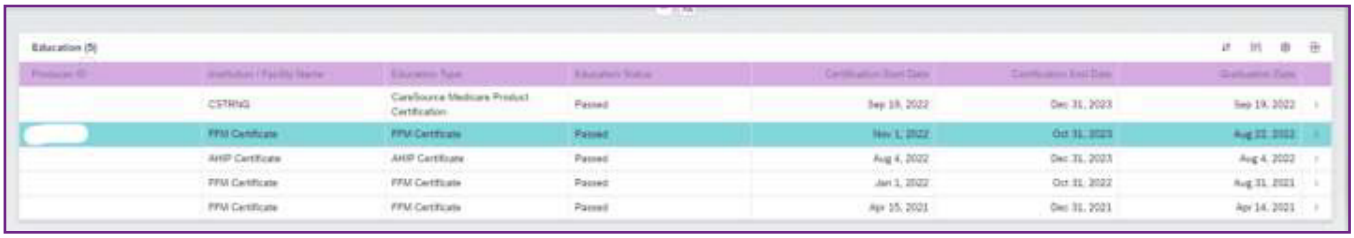
By clicking on the **Education Card**, the system will allow you to view each **Certification**.

Example below shows the Certifications.



Click on a specific line to open a specific **Certification** detail.

Example shows highlighted line to be viewed.



The example below shows the specific FFM Certification detail.

CareSource

Education Detail for

Education - MKTPLC - FFM Certificate

Education ID:	Institution / Facility Name:	Education Status:
MKTPLC	FFM Certificate	Passed

Detail Information

Education ID:	MKTPLC	Institution / Facility Name:	FFM Certificate	Education Type:	FFM Certificate
Education Status:	Passed	Product Code:	–	Certification Start Date:	Nov 1, 2022
Certification End Date:	Oct 31, 2023	Graduation Date:	Aug 22, 2022	License Type:	–
License Class:	–	License State:	–	CEU Credits:	–
CEU Credit Expiration:	–	Comments:	Obtained from AB_Registration_Completion_List from data.healthcare.gov on 8/24/2022		

Education Reference Fields

Score:	–	License Number:	–	Company Code:	–
CMS Core Training:	–	Product 1 Training:	–		

Files

Files

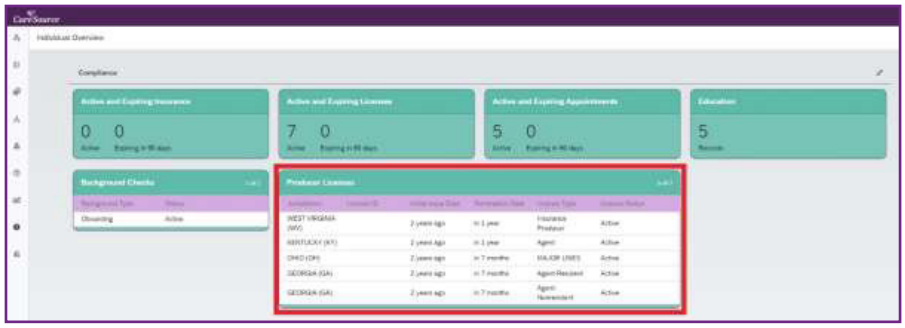
No data found. Try adjusting the filter settings.

PRODUCER LICENSES

The Producer Licenses Card will list the Producer Licenses.

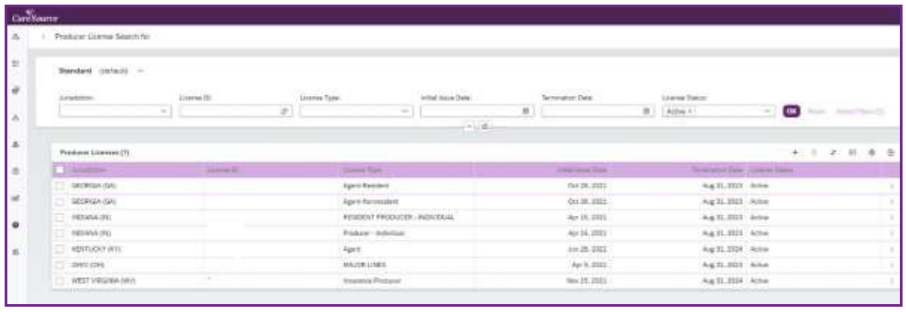
To access your **Producer Licenses Details**:

- Click on the **Producer Licenses Card**. The example below shows 5 of 7 Producer Licenses.



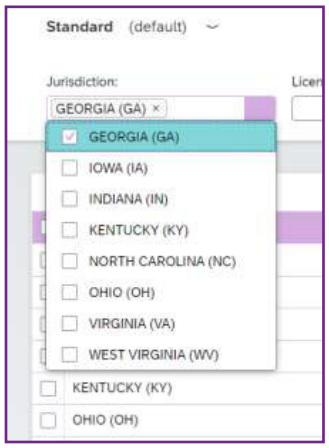
By clicking on the **Producer Licenses Card**, the system will allow you to view all licenses.

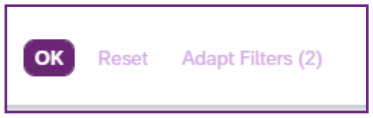
Example below shows the complete list and license detail.



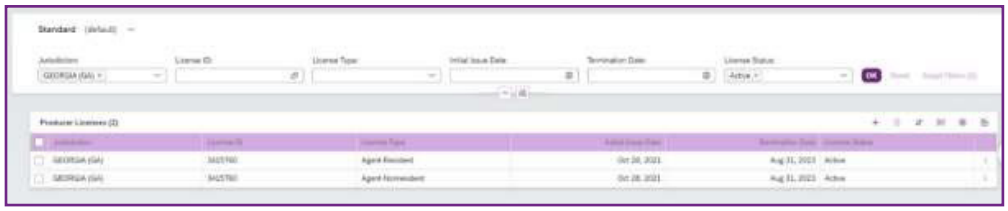
By using the filter dropdowns, you may choose specifics. The example below shows filtered by Jurisdiction for Georgia.

Click OK on far right of screen after choosing state.



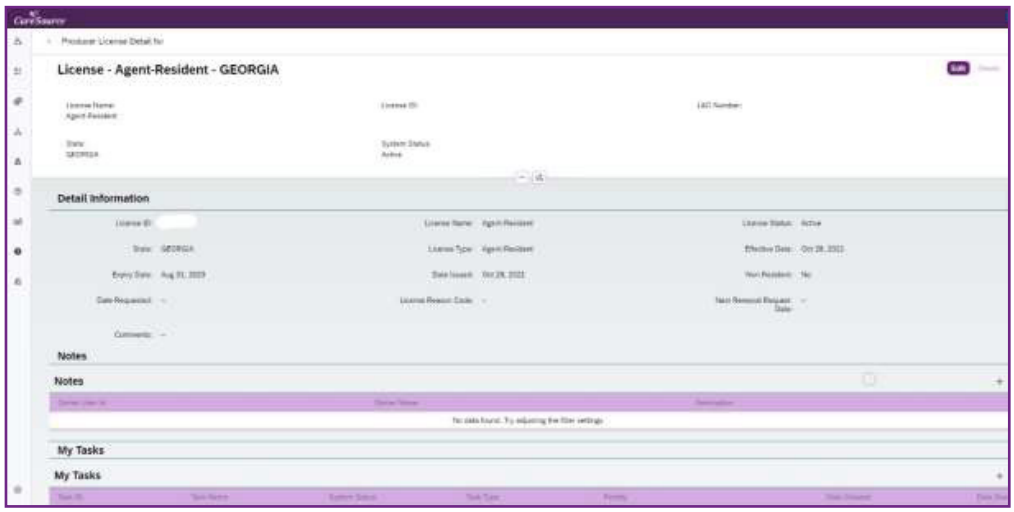


Example below shows results for Georgia licenses.



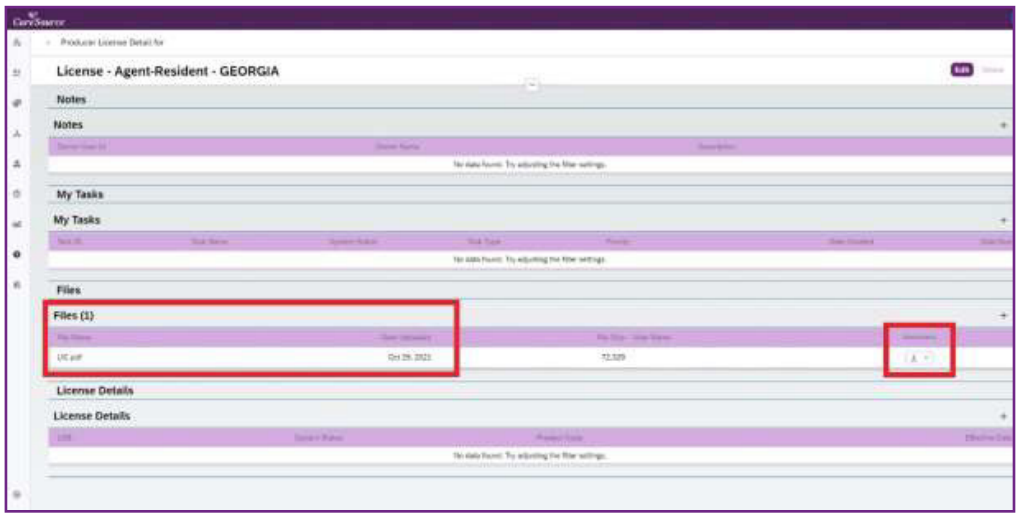
By clicking on either line, the system will show specific license detail.

Example below shows the first of two Georgia license detail.



By scrolling down on this page, you can view **Files** which may include a pdf copy of the state license.

The pdf may be downloaded by clicking on the Attachment button on far right.

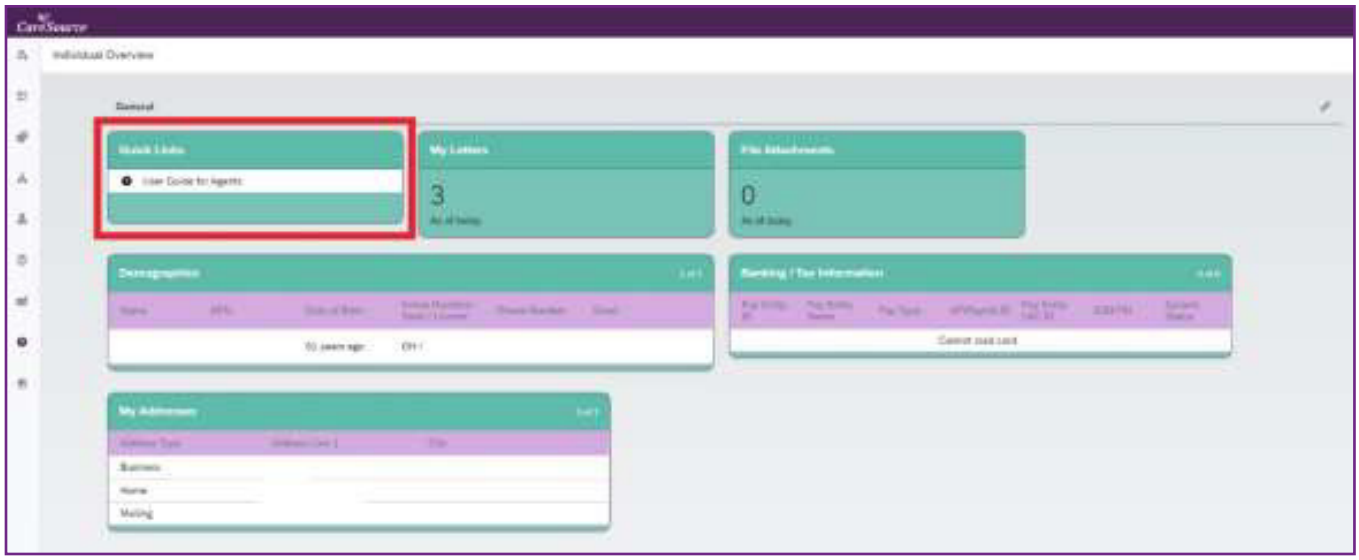


QUICK LINKS

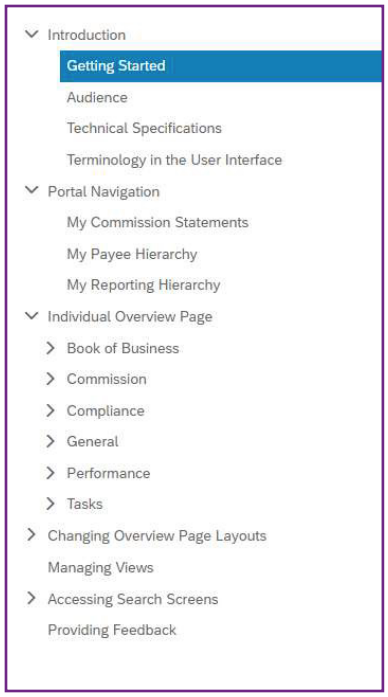
The Quick Links Card will provide links to useful documentation.

To access your **Quick Links**:

- Click on the **Quick Links Card**. The example below shows the link for the User Guide.



By clicking on that link, you will be taken directly to the **User Guide** which can be viewed and downloaded to PDF.

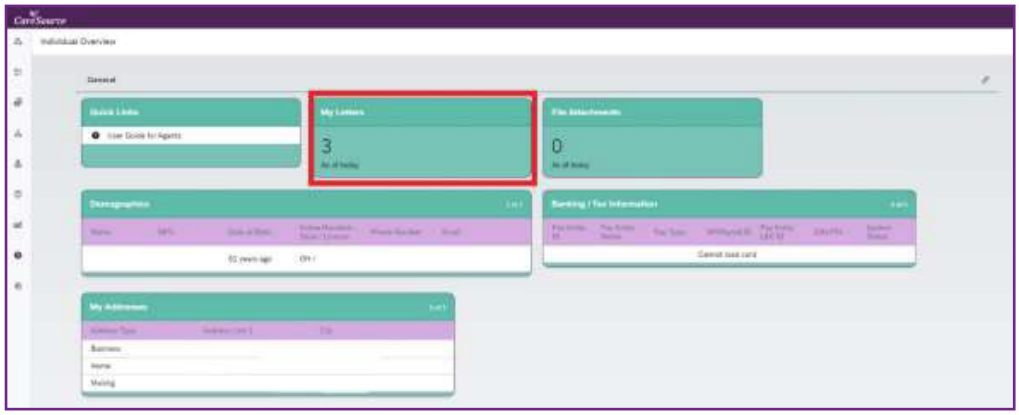


MY LETTERS

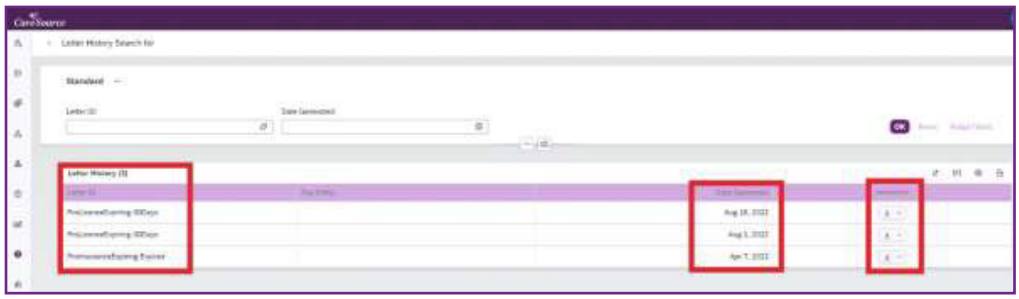
The My Letters Card will house all letters sent to the agent.

To access your **My Letters Details**:

- Click on the **My Letters Card**. The example below shows 3 Letters.



By clicking on the **My Letters Card**, you can view each letter detail.



By clicking on the **Attachment** down arrow, you can open and view the letter.

The example below shows details of the top (most recent) letter.

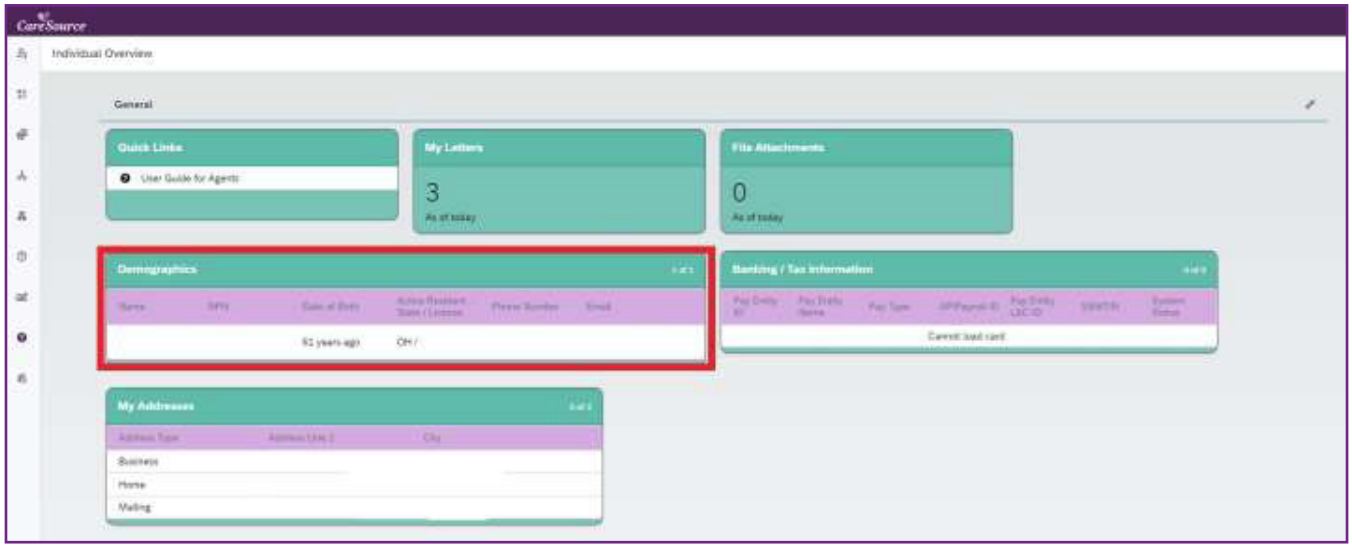
HIPPA information has been removed.

DEMOGRAPHICS

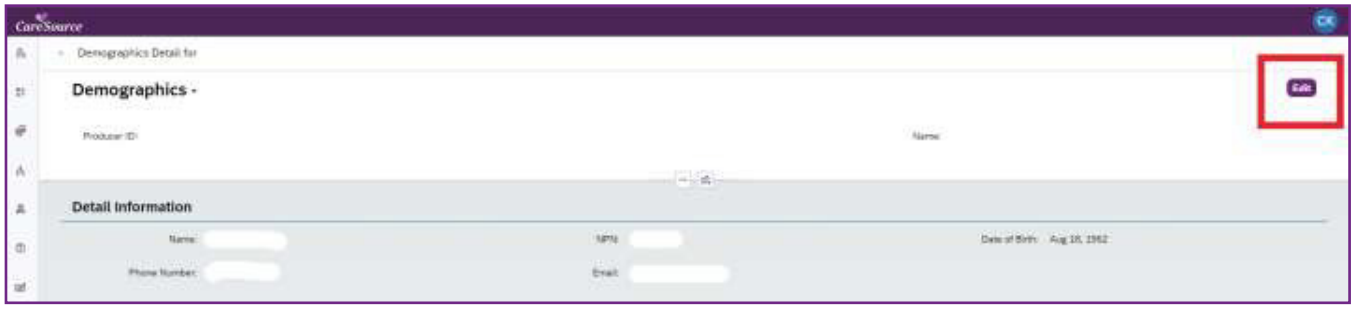
The Demographics Card will list the producers demographics.

To access your **Demographics Details**:

- Click on the **Demographics Card**. The example below provides the Name, NPN, Date of Birth, Resident State License, Phone Number and Email address.



By clicking on the **Demographics Card**, you can view the information and make any changes by clicking on the **EDIT** button on top right of screen.



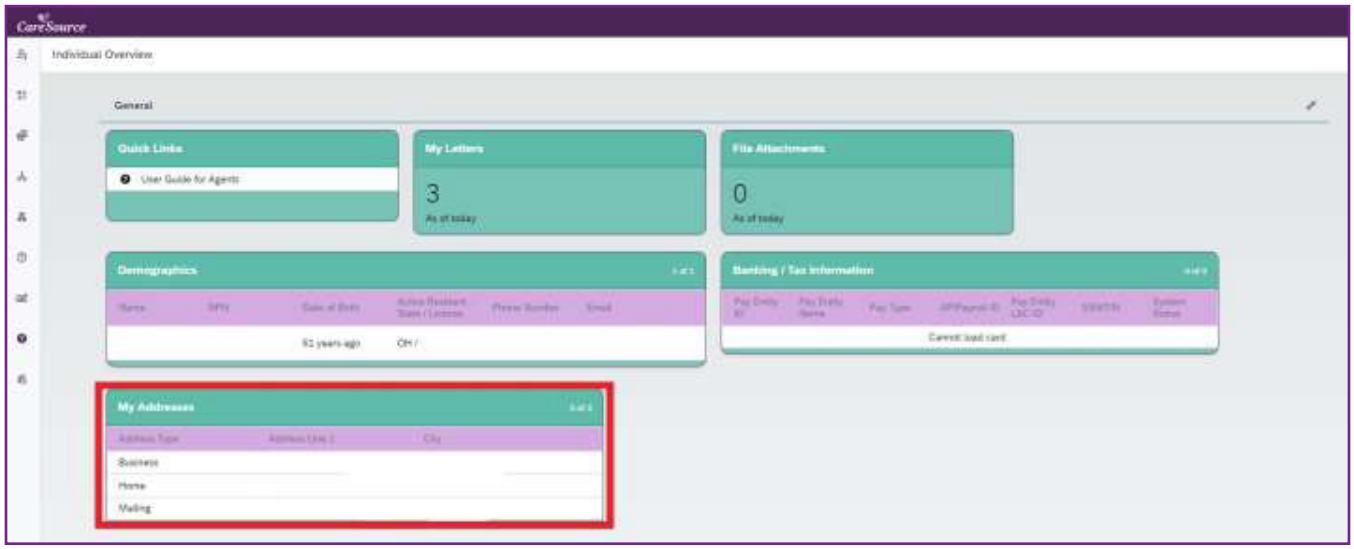
HIPPA has been removed from example.

MY ADDRESSES

The My Addresses Card will list the agents Addresses.

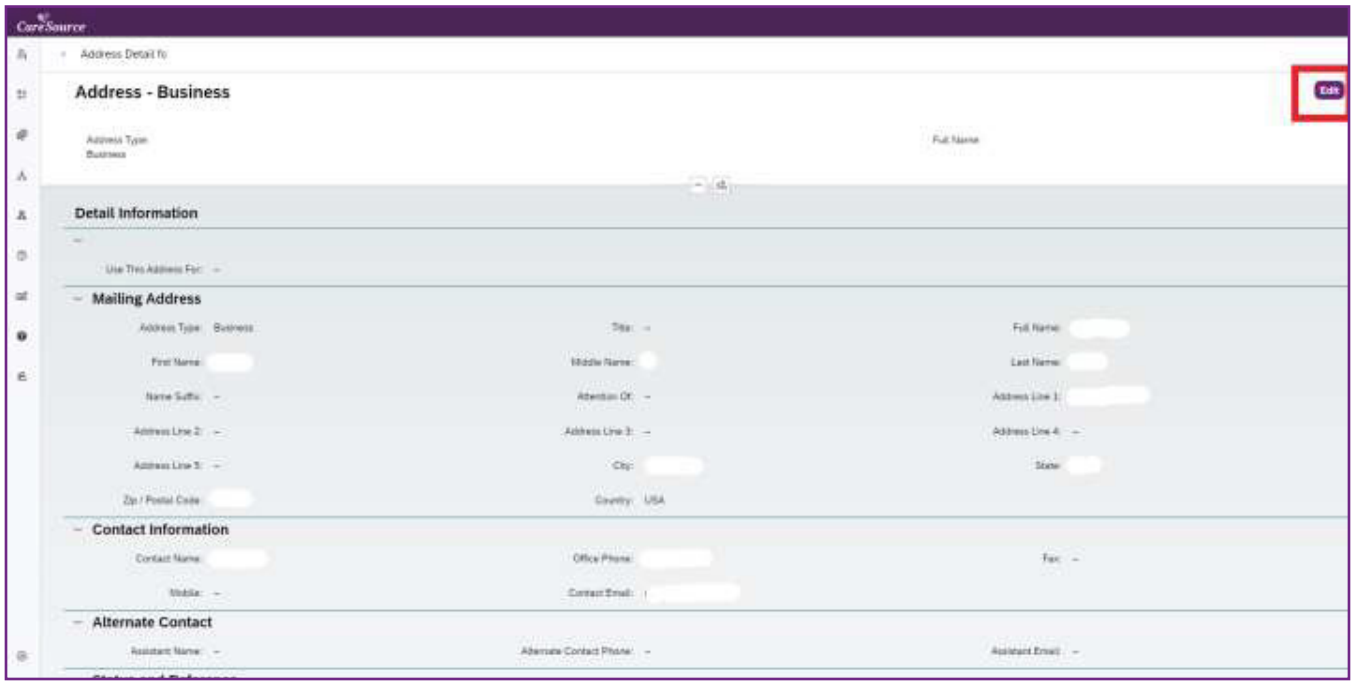
To access your **My Addresses Details**:

- Click on the **My Addresses Card**. The example below shows Business, Home and Mailing addresses. HIPPA has been removed.



By clicking on the **My Addresses Card**, you may view each address.

Click into each address to view and Edit if needed.

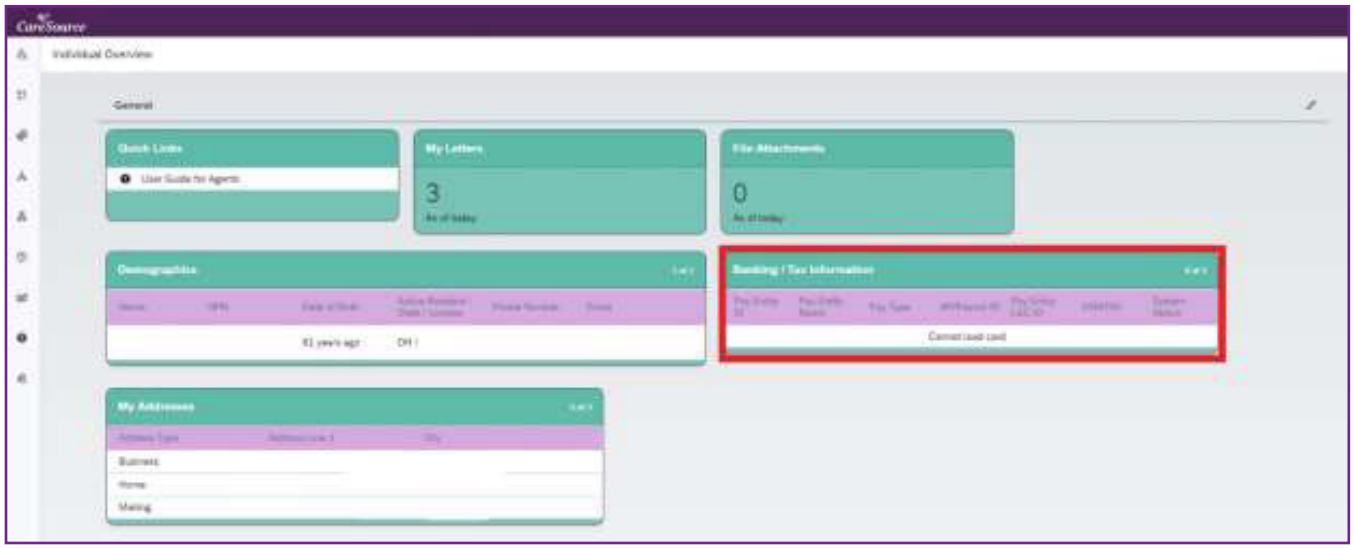


BANKING/TAX INFORMATION

The Banking/Tax Information Card will list the agents Banking/Tax Information.

To access your **Banking/Tax Information Details**:

- Click on the **Banking/Tax Information Card**. HIPPA has been removed.



By clicking on the **Banking/Tax Information Card**, you may view the Banking Account and Routing Numbers, as well as the SSN on file. No example is provided.

By clicking into that line, you may Edit the information.

TOOLS & RESOURCES

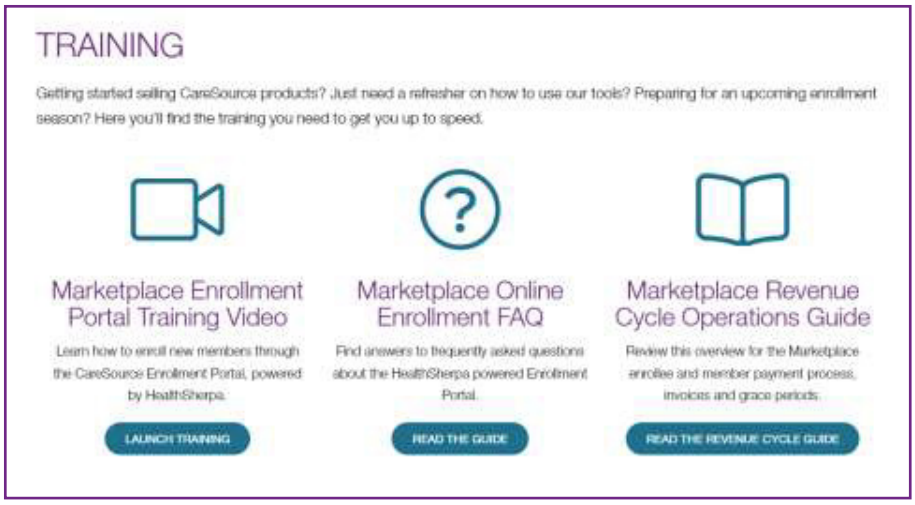
The Tools & Resources Card will contain links to useful sources of information.

To access your **Tools & Resources Details**:

- Click on the **Tools & Resources Card**. The example below shows 5 Resources.
  Training/ CareSource
  Plans & Services
  Marketing materials
  Find My Prescriptions
  Find A Doctor

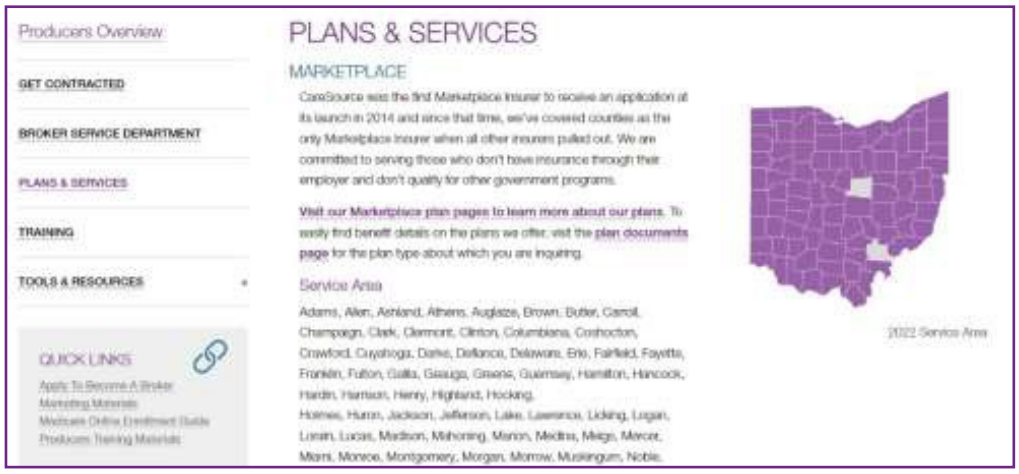
Examples:

By clicking on the **Training/CareSource** link, you will be directed to the Training site for current training videos and Enrollment FAQ.

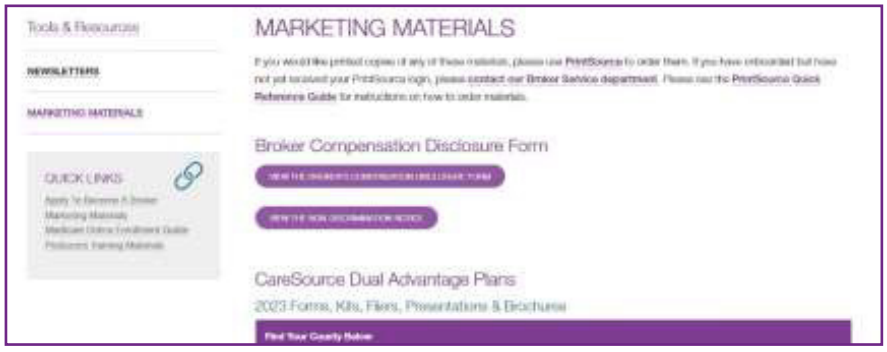


By clicking on the **Plans & Services** link, you will be directed to the Plan and service information per state.

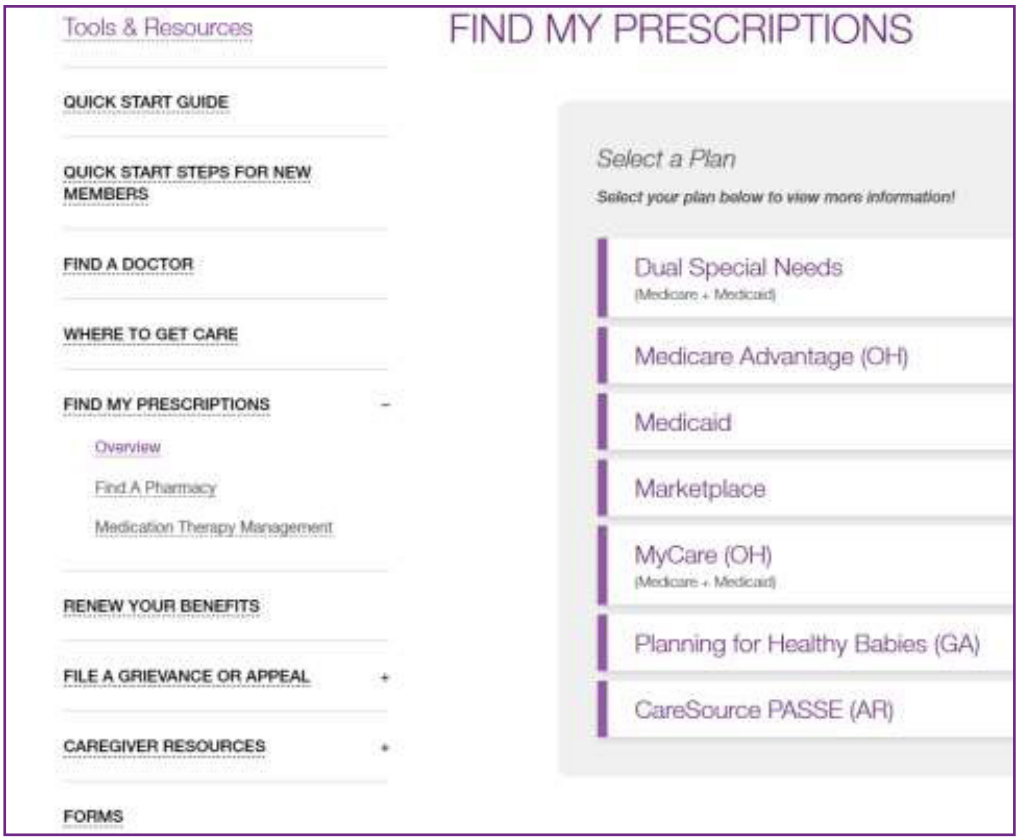
Example below shows Ohio home page.



By clicking on the **Marketing Materials** link, you will be directed to the Marketing Materials site and asked to select the specific state. Here you will find Marketing and Benefits Brochures and the link to use to order printed materials.



By clicking on the **Find My Prescription** link, you will be directed to the Prescription Tools & Resources site.



By clicking on the **Find A Doctor** link, you will directed to the Find A Doctor Tool.

PRODUCER GUIDE DOWNLOAD

The Producer Guide Download Card provides the Producer Guide and option to print a copy.

To access your **Producer Guide**:

- Click on the download arrow on the **Card**.

Example below shows the Contents of the attached Producer Guide.

Contents

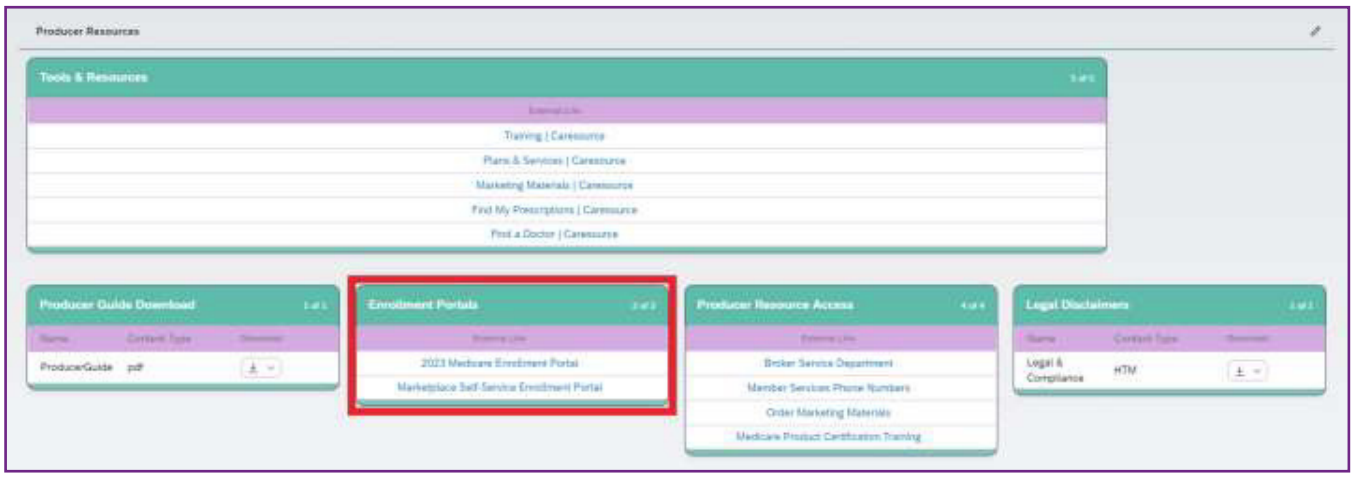
ABOUT CARESOURCE 3
CONTRACTING 5
LICENSING AND APPOINTMENT 6
CERTIFICATION 7
CARESOURCE CODE OF CONDUCT 8
PENDED (WITHHELD) COMMISSIONS 10
CHARGEBACK DEBT RECOVERY 10
CHANGING PRODUCER OF RECORD 11
TRANSFERRING FMO 12
COMPLIANCE 14
AGENT, BROKER AND WEB BROKER EXPECTATIONS 16
SALES & MARKETING GRIEVANCE PROCESS 18
FRAUD, WASTE AND ABUSE (FWA) 19
HIPAA PRIVACY PRACTICES 20
NON-DISCRIMINATION NOTICE 21
MARKETING MATERIALS 23
PRODUCER SERVICE DEPARTMENT 23
PRODUCER PORTAL GUIDE 24
AGENT AND BROKER COMPENSATION DISCLOSURE 26

ENROLLMENT PORTALS

The Enrollment Portals Card will provide links to the Medicare and Marketplace Enrollment Portals.

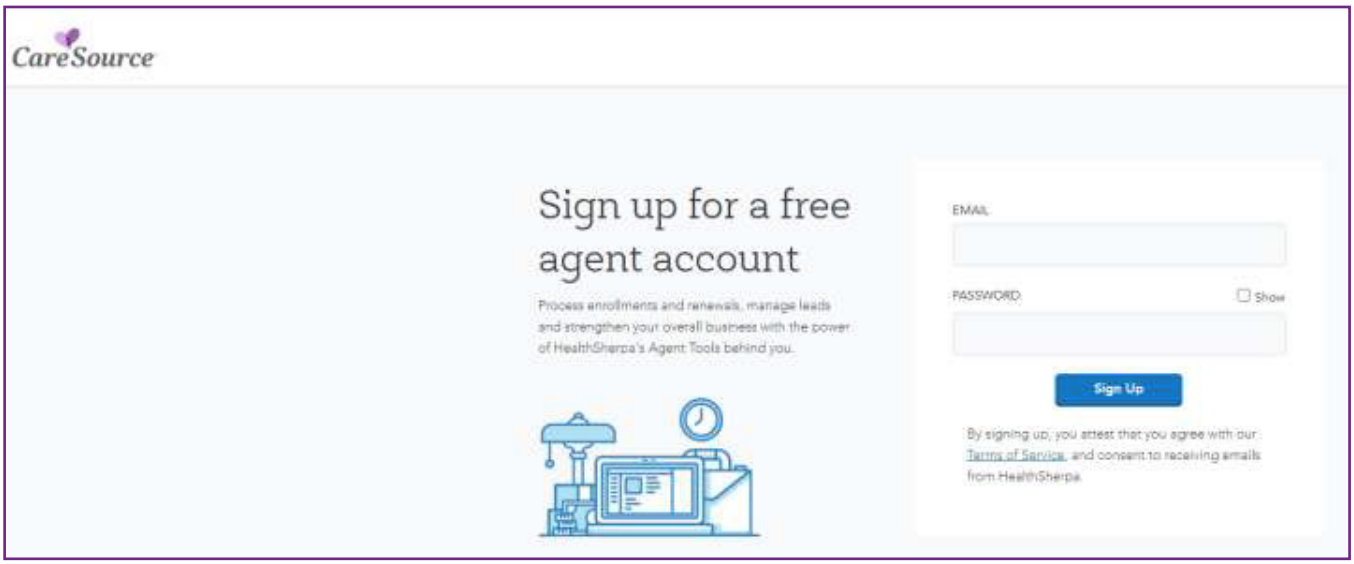
To access your **Enrollment Portals** links:

- Click on the **Enrollment Portal External Link**.



By clicking on the specific link, the system will direct you to the corresponding site.

Example below shows the CareSource site for Marketplace enrollments via HealthSherpa.



PRODUCERS RESOURCE ACCESS

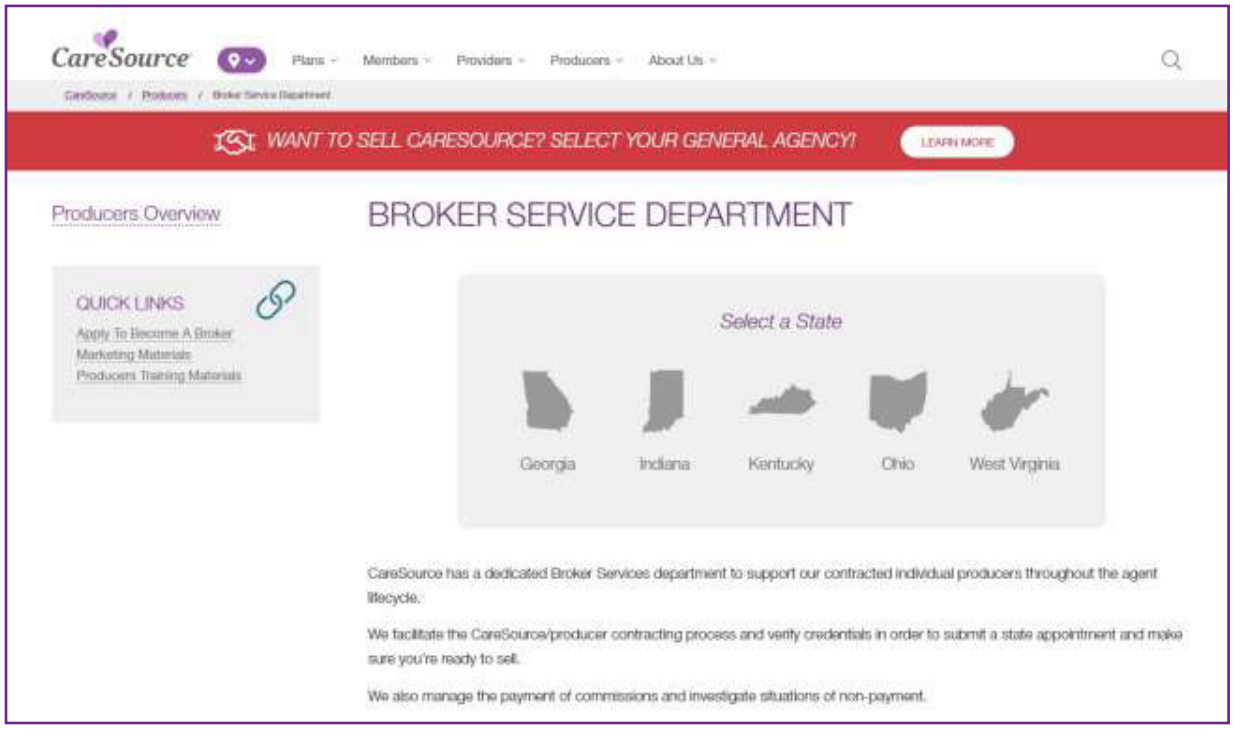
The Producers Resource Access Card will list the total number of current active members.

To access your **Producers Resource Access External Links**:

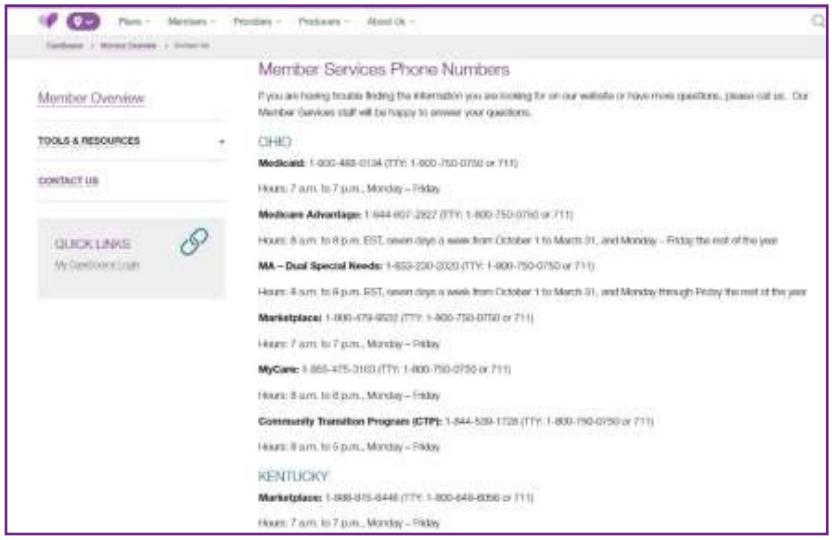
- Click on the **Producers Resource Access Link**. The example below shows 4 External Link options.

By clicking on the **Producers Resource Link**, the system will direct you to that specific site.

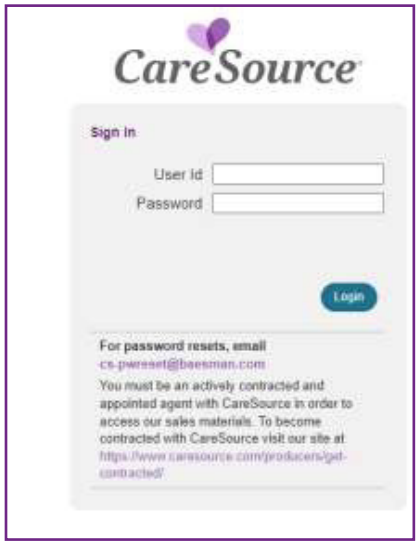
Example below shows the Brokers Service Department link.



Example below shows the Member Services Phone Numbers link.



Example below shows the Order Marketing Materials link.



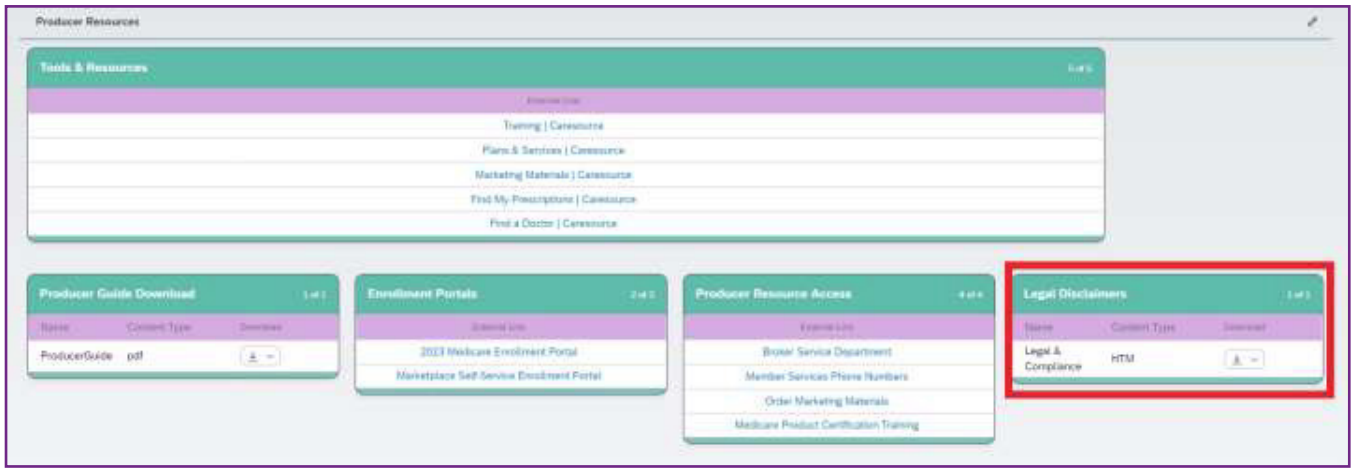
Example below shows the Medicare Product Certification Training link.

LEGAL DISCLAIMERS

The Legal Disclaimers Card provides the CareSource Legal and Compliance Document.

To access the **Legal and Compliance Details**:

- Click on the **Legal and Compliance download** button.



The **Legal Disclaimers download** will contain, but is not limited to:

- Terms and Conditions
- HIPPA Privacy practices
- Non-Discrimination Notice

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