

---

# AGENT CONNECT TUTORIAL

---





# CONTENTS

Active Members .....	2
Expiring Policies .....	4
Medicare Applications .....	5
Policy Sales Over Time .....	6
Year to Date Policy Sales .....	9
Customer Sales .....	11
My Commission Statements.....	13
Commission Amount .....	15
Bonus Amount.....	17
Commissions and Members Count .....	19
Active and Expiring Insurance .....	21
Background Checks .....	22
Active and Expiring Licenses.....	23
Active and Expiring Appointments.....	24
Education .....	25
Producer Licenses .....	27
Quick Links.....	29
My Letters.....	30
Demographics.....	31
My Addresses .....	32
Banking/Tax Information .....	33
Tools & Resources .....	34
Producer Guide Download .....	37
Enrollment Portals.....	38
Producers Resource Access .....	39
Legal Disclaimers.....	41

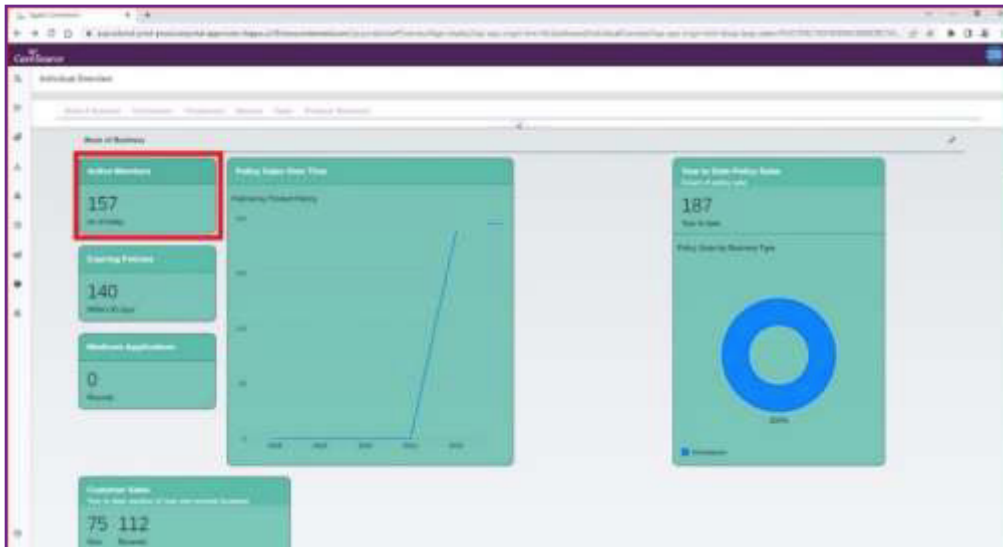


# ACTIVE MEMBERS

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.

The screenshot shows a table of customer search results. The table has columns for Customer ID, Customer Name, Policy ID, Policy Type, Policy Status, and Policy Date. The first row shows a customer with ID 1000000000, Name John Doe, Policy ID 1000000000, Policy Type Life Insurance, Policy Status Active, and Policy Date 12/31/2020. The second row shows a customer with ID 1000000000, Name John Doe, Policy ID 1000000000, Policy Type Life Insurance, Policy Status Active, and Policy Date 12/31/2020. The third row shows a customer with ID 1000000000, Name John Doe, Policy ID 1000000000, Policy Type Life Insurance, Policy Status Active, and Policy Date 12/31/2020.

Customer ID	Customer Name	Policy ID	Policy Type	Policy Status	Policy Date
1000000000	John Doe	1000000000	Life Insurance	Active	12/31/2020
1000000000	John Doe	1000000000	Life Insurance	Active	12/31/2020
1000000000	John Doe	1000000000	Life Insurance	Active	12/31/2020



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.

The screenshot shows the CapriSource web application interface. At the top, there are search filters for Subscriber Number, Subscriber Name, Policy ID, Termination Date, and Policy State. Below these filters is a table of members. The table has columns for various fields including Policy ID, Effective Date, Termination Date, and Policy State. An export icon (a small square with a right-pointing arrow) is highlighted in the top right corner of the table area.

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

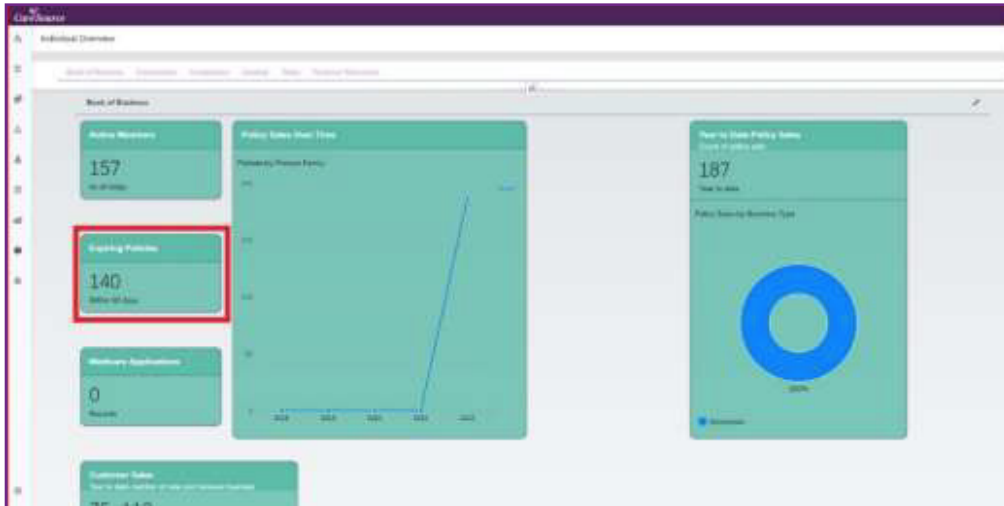


# EXPIRING POLICIES

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.

The screenshot shows a 'Customer Search List' with a table of customer details. The table has columns for Policy ID, Product Name, Submitter Name, Date of Birth, Policy Type, ZIP, Phone, Policy ID, Number of Dependents, Effective Date, Termination Date, and Policy Status. Three rows are visible, all with a status of 'Effectuated'.

Policy ID	Product Name	Submitter Name	Date of Birth	Policy Type	ZIP	Phone	Policy ID	Number of Dependents	Effective Date	Termination Date	Policy Status
10121343	CardSource	10121343	10121343	10121343	10121343	10121343	10121343	10121343	10121343	10121343	Effectuated
10121344	CardSource	10121344	10121344	10121344	10121344	10121344	10121344	10121344	10121344	10121344	Effectuated
10121345	CardSource	10121345	10121345	10121345	10121345	10121345	10121345	10121345	10121345	10121345	Effectuated

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.

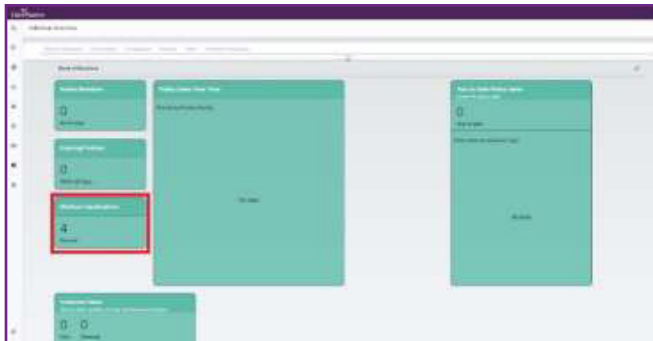


# MEDICARE APPLICATIONS

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

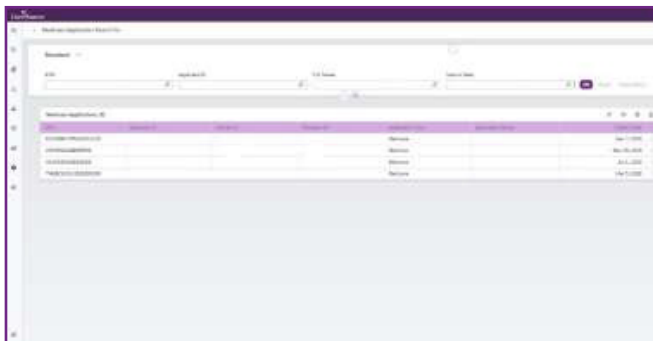
To access your Medicare Applications Details:

- 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.

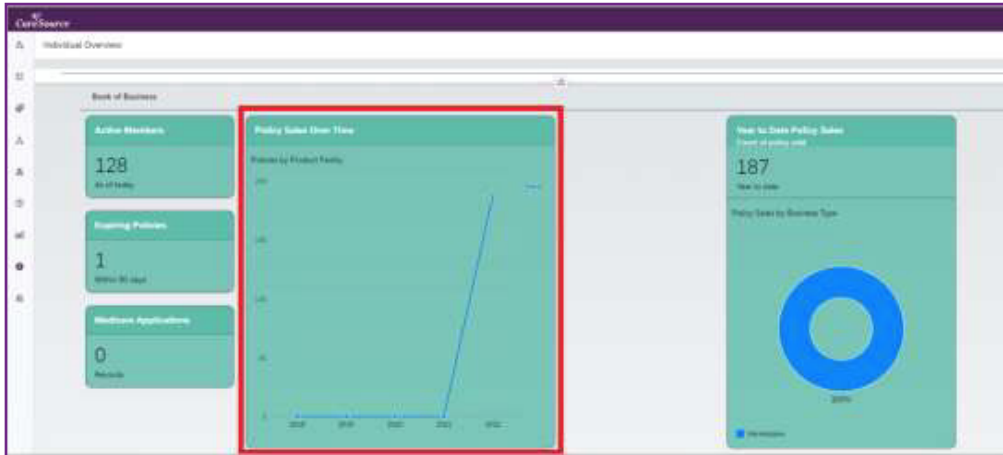




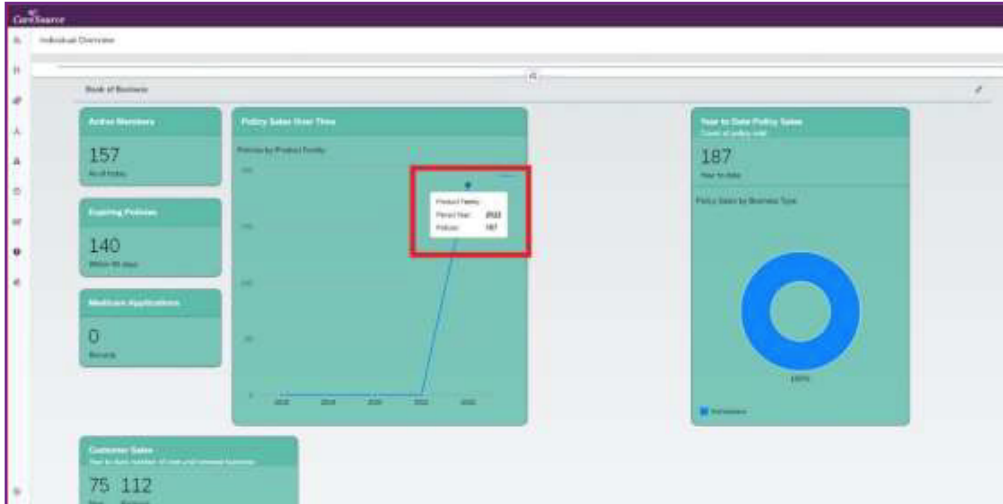
# POLICY SALES OVER TIME

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

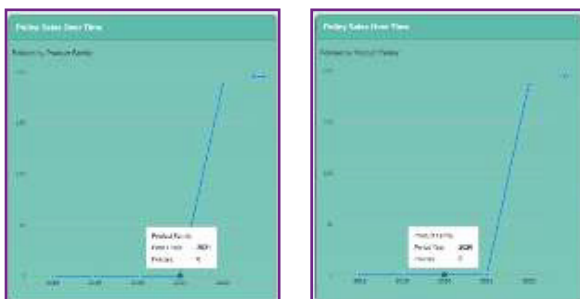
To access your Policy Sales Over Time, click on the card.



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



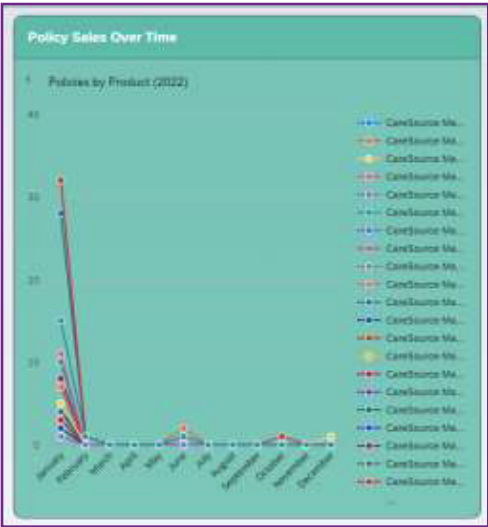
Examples below shows the policies for the calendar years 2021 and 2020.





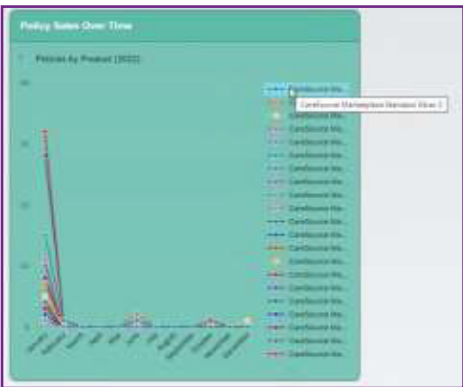
Click on the specific year to provide further details for that year.

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.

The screenshot shows a software interface for viewing member plan details. At the top, there are search filters for "Customer Number", "Effective Date", "Policy ID", "Product", "Plan Name", "Market Plan", "Policy Plan", and "Policy Type". Below these filters is a table with columns: "Customer", "Product", "Policy", "Plan", "Market", "Policy", "Policy", "Policy", "Policy", "Policy". The table contains two rows of data. The first row shows a member with a "Market Plan" of "CareSource Marketplace Standard Silver 2". The second row shows a member with a "Market Plan" of "CareSource Marketplace Standard Silver 2".



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

**Customer Sales Search for**

**Standard (default)**

Subscriber Number: [ ] Subscriber Name: [ ] Policy ID: [ ] Product: **Vision, & Fitness >** Period Month: [ ] Period Year: **2022** Policy Status: [ ] Policy Type: [ ]

**Customer Sales (187)**

Position #	Product Name	Subscriber Name	Subscriber Name	Date of Birth	Policy	Number of Dependents	Effective Date	Termination Date	Policy Status
Aging Status: Current Premium Amount: \$42,500.00 Tax Credit Amount: 421,000.00 Current Balance: 120.54 Paid Through Date: 12/31/2022 Last Paid Date: 11/29/2022				07/23/1969	HQ23A	1	01/01/2022	12/31/2022	Effectuated
Aging Status: Current Premium Amount: 616,380.00 Tax Credit Amount: 592,000.00 Current Balance: 271.04 Paid Through Date: 11/30/2022 Last Paid Date: 10/27/2022				09/23/1965	HQ23A	1	01/01/2022	12/31/2022	Effectuated

**Product Selection List:**

- CareSource Marketplace
- CareSource Marketplace Bronze
- CareSource Marketplace Bronze Dental, Vision, & Fitness
- CareSource Marketplace Bronze First
- CareSource Marketplace Bronze First
- CareSource Marketplace Bronze First Dental, Vision, & Fitness
- CareSource Marketplace Bronze First Limited
- CareSource Marketplace Bronze First Limited Dental, Vision, & Fitness
- CareSource Marketplace Bronze First Zero
- CareSource Marketplace Bronze First Zero Dental, Vision, & Fitness
- CareSource Marketplace Bronze-H Zero
- CareSource Marketplace Bronze Limited
- CareSource Marketplace Bronze Limited Dental, Vision, & Fitness
- CareSource Marketplace Bronze Zero
- CareSource Marketplace Bronze Zero Dental, Vision, & Fitness
- CareSource Marketplace Catastrophic
- CareSource Marketplace Gold
- CareSource Marketplace Gold Dental, Vision, & Fitness
- CareSource Marketplace Gold Dental, Vision, & Fitness
- CareSource Marketplace Gold Limited
- CareSource Marketplace HSA Eligible Bronze
- CareSource Marketplace Low Deductible Silver

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

Customer Sales Search for

Standard (default) —

Filtered By (2): Product, Period Year

Customer ID	Customer Name	Subscriber Number	Subscriber Name	Date of Birth	Policy State	ZIP	Phone	Product	Policy ID	Number of Payments	Effective Date	Termination Date	Policy Status
				03/23/1976	INDIANA (IN)	46032		CareSource Marketplace Bronze Dental, Vision, & Fitness		1	01/01/2022	12/31/2022	Effectuated
<p>Aging Status: Current</p> <p>Premium Amount: 295.30000</p> <p>Tax Credit Amount: 385.92000</p> <p>Current Balance: 43.75</p> <p>Paid Through Date: 12/31/2022</p> <p>Last Paid Date: 06/29/2022</p>													
				04/06/1963	OHIO (OH)	45305		CareSource Marketplace Bronze Dental, Vision, & Fitness		7	01/01/2022	12/31/2022	Effectuated
<p>Aging Status: Current</p> <p>Premium Amount: 1,103.08000</p> <p>Tax Credit Amount: 1796.00000</p> <p>Current Balance: 0.00</p> <p>Paid Through Date:</p> <p>Last Paid Date: 11/30/2022</p>													
				07/10/1963	INDIANA (IN)	46205		CareSource Marketplace Bronze		1	01/01/2022	12/31/2022	Effectuated
<p>Aging Status: Current</p> <p>Premium Amount: 555.98000</p> <p>Tax Credit Amount: 604.00000</p>													

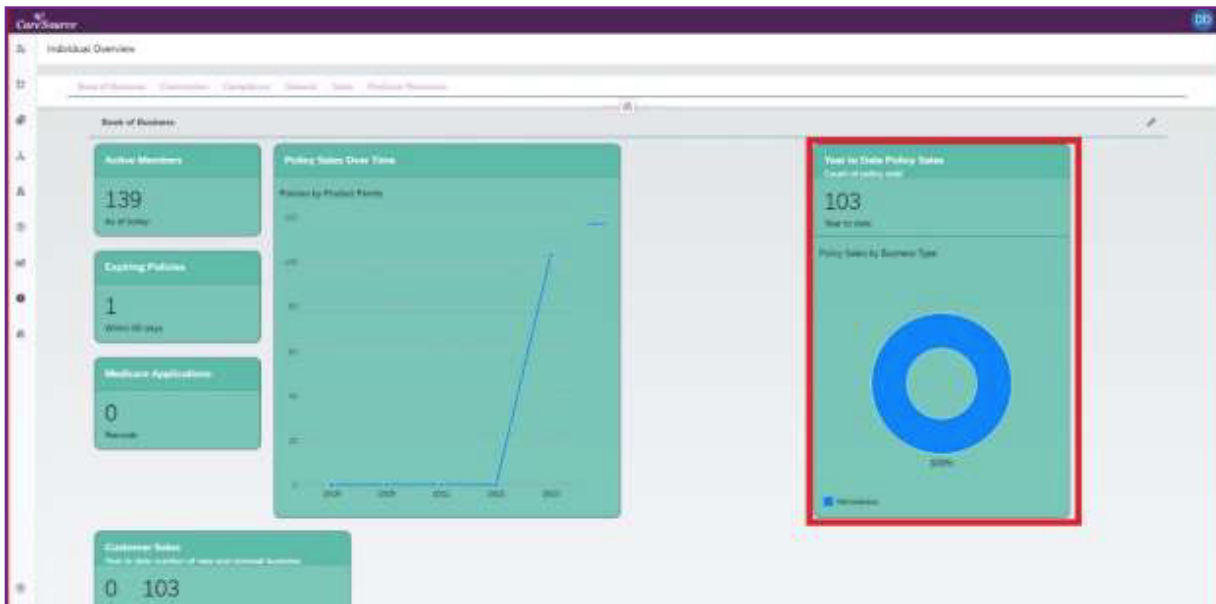


# YEAR TO DATE POLICY SALES

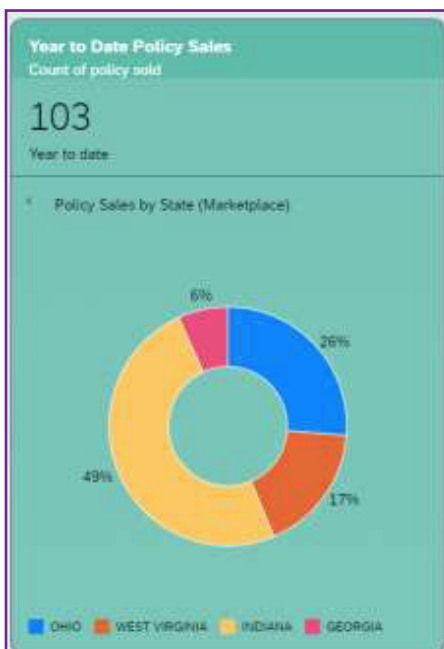
The Year to Date Policy Sales card will list your policy count for the current year.

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.

The screenshot shows the 'Customer Sales Search' interface. At the top, there are search filters: Subscriber Number, Subscriber Name, Policy ID, Product, Period Month, Period Year (set to 2023), Policy State, and Policy Type. Below the filters is a table titled 'Customer Sales (203)'. The table has columns: Product ID, Product Name, Subscriber Number, Subscriber Name, Start of Policy, Policy Year, ZIP, Plans, Product, Policy ID, Number of Subscribers, Effective Date, Termination Date, Policy Status, and Policy Subsidy. Two rows are visible in the table, both for 'CareSource Marketplace Bronze First Dental, Vision, & Fitness' policies. Each row has a detailed view button and a 'Show Details' link. Below the table, there is a section for 'Aging Status: Current' with fields for Premium Amount, Tax Credit Amount, Current Balance, and Paid Through Date.

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.

This screenshot shows the same 'Customer Sales Search' interface, but with the 'Product' dropdown menu open. The dropdown lists various product options, including 'CareSource Marketplace', 'CareSource Marketplace Bronze', 'CareSource Marketplace Bronze Dental, Vision, & Fitness', 'CareSource Marketplace Bronze First', 'CareSource Marketplace Bronze First Dental, Vision, & Fitness', 'CareSource Marketplace Bronze First Limited', 'CareSource Marketplace Bronze First Limited Dental, Vision, & Fitness', 'CareSource Marketplace Bronze First Zero', 'CareSource Marketplace Bronze First Zero Dental, Vision, & Fitness', 'CareSource Marketplace Bronze H Zero', 'CareSource Marketplace Bronze Limited', 'CareSource Marketplace Bronze Limited Dental, Vision, & Fitness', 'CareSource Marketplace Bronze Zero', 'CareSource Marketplace Bronze Zero Dental, Vision, & Fitness', 'CareSource Marketplace Catastrophic', 'CareSource Marketplace Gold', 'CareSource Marketplace Gold Dental, Vision, & Fitness', 'CareSource Marketplace Gold Limited', 'CareSource Marketplace HSA Eligible Bronze', and 'CareSource Marketplace Low Deductible Silver'. The 'Product' dropdown is currently set to 'CareSource Marketplace'. The 'Period Year' is set to 2023. The 'Policy Status' is set to 'Effective'. The 'Policy Type' is set to 'Bronze'. The 'Number of Subscribers' is 1. The 'Effective Date' is 01/01/2023. The 'Termination Date' is 12/31/2023. The 'Policy Subsidy' is 'Effective'.



# 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.

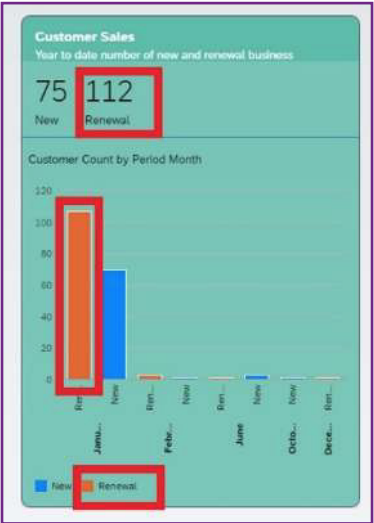
Customer Sales Search

Standard | Controls

Sales Type: **New**

Customer ID	Customer Name	Salesperson	Sales Amount	Sales Date
10000001	ABC Corp	John Doe	\$1000.00	1/1/2020
10000002	DEF Corp	Jane Smith	\$2000.00	2/1/2020
10000003	GHI Corp	Bob Johnson	\$3000.00	3/1/2020

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



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

Customer Sales Search

Standard | Controls

Sales Type: **Renewal**

Customer ID	Customer Name	Salesperson	Sales Amount	Sales Date
10000001	ABC Corp	John Doe	\$1000.00	1/1/2020
10000002	DEF Corp	Jane Smith	\$2000.00	2/1/2020
10000003	GHI Corp	Bob Johnson	\$3000.00	3/1/2020

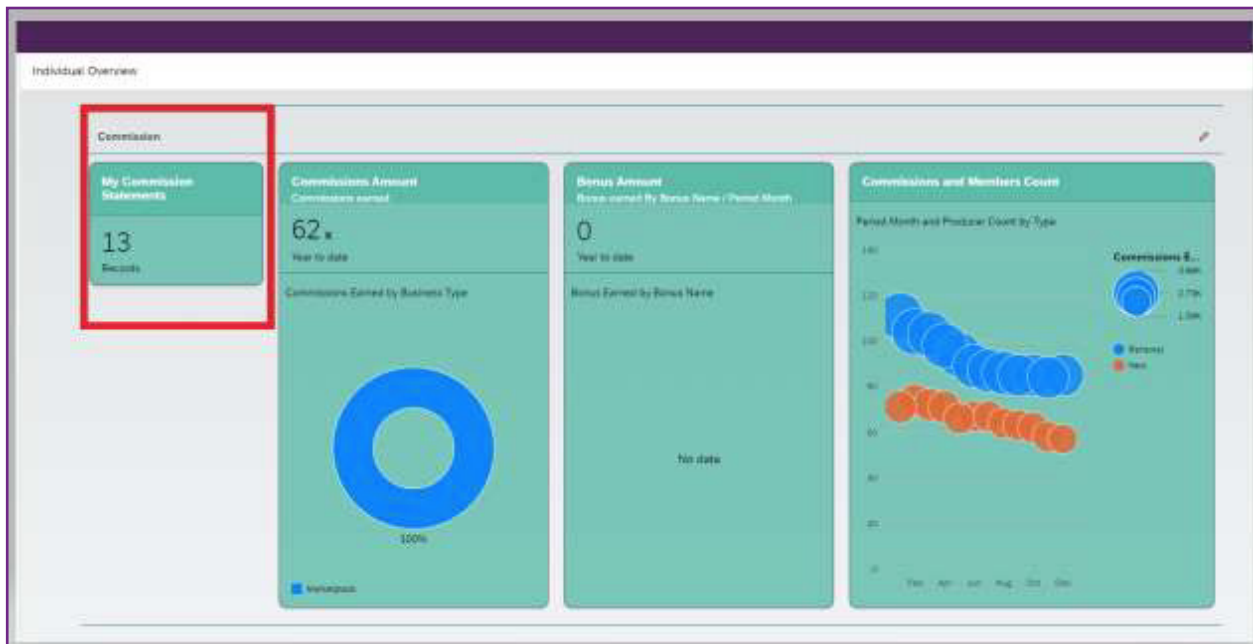


# MY COMMISSION STATEMENTS

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.

The screenshot shows the 'Commission Statement Search' interface. It includes search filters for 'Payee Entity ID', 'Payee Name', 'Payee Type', 'Process Year', 'Process Month', and 'Date Generated'. Below the filters is a table titled 'Commission Statements (28)' with columns: 'Payee Entity ID', 'Payee Name', 'Payee Type', 'Process Year', 'Process Month', 'Date Generated', and 'Amount'. The table lists 12 rows of data for the year 2022, from January to December.

Payee Entity ID	Payee Name	Payee Type	Process Year	Process Month	Date Generated	Amount
		External Payroll	2022	January	Jan 15, 2022	1
		External Payroll	2022	February	Feb 15, 2022	1
		External Payroll	2022	March	Mar 7, 2022	1
		External Payroll	2022	April	Apr 12, 2022	1
		External Payroll	2022	May	May 12, 2022	1
		External Payroll	2022	June	Jun 14, 2022	1
		External Payroll	2022	July	Jul 8, 2022	1
		External Payroll	2022	August	Aug 12, 2022	1
		External Payroll	2022	September	Sep 15, 2022	1
		External Payroll	2022	October	Oct 20, 2022	1
		External Payroll	2022	November	Nov 14, 2022	1
		External Payroll	2022	December	Dec 9, 2022	1
		External Payroll	2022	December	Dec 15, 2022	1



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

Standard

Payee Entity ID:  Payee Name:  Payout Type:  Process Year:

2024  
2023  
2022  
2021

Commission Statements (13)

Payee Entity ID	Payee Name	Payout Type	Process Year
			2021

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	Attachments	
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 Statement Detail

Commission Statement - January - 2022

Date Generated: Jan 10, 2022 Statement Number: 1041341400170000 File Type: PDF

Attachments

Attachments

No data found. Try adjusting the filter settings.

Statement Commissions

Statement Commissions (134)

Employee ID	Employee Name	Statement Date	Payout Type	Amount	Commission Amount
04	CarlSource Markus Karl Davis Vince S Peters	Dec 25, 2021 7:00:00 PM	Dec 30, 2021 7:00:00 PM	11/20/21 11/20/21	Yes 25.00 25.00
04	CarlSource Markus Bruce P	Dec 31, 2021 7:00:00 PM	Dec 31, 2021 7:00:00 PM	11/20/21 11/20/21	Yes 25.00 25.00
04	CarlSource Markus Bruce P	Dec 31, 2021 7:00:00 PM	Dec 30, 2021 7:00:00 PM	11/20/21 11/20/21	Yes 25.00 25.00
04	CarlSource Markus Bruce P	Dec 31, 2021 7:00:00 PM	Mar 30, 2022 8:00:00 PM	11/20/21 11/20/21	Yes 25.00 25.00
04	CarlSource Markus Bruce P	Dec 31, 2020 7:00:00 PM	Dec 30, 2021 7:00:00 PM	11/20/21 11/20/21	Yes 25.00 25.00

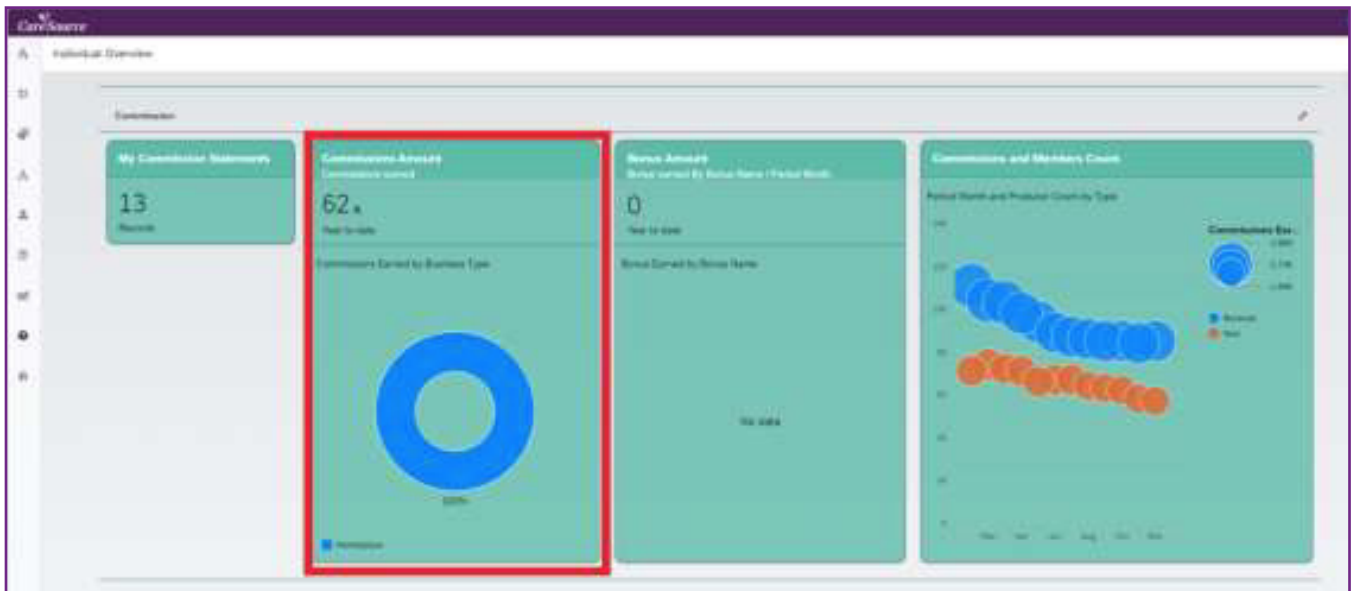


# COMMISSION AMOUNT

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.

Standard (00/00/00)

Policy ID: [Example] Member ID: [ ] Member Name: [ ] Period Year: 2022 Period Month: [ ] Policy Issue State: [ ] Product: [ ] SubType: [ ]

Policy Type: [ ] Member Number: [ ] Product: [ ]

OK Cancel Refresh Filter

Product Commissions (198)

Policy ID	Member ID	Member Name	Period Year	Period Month	Policy Issue State	Product	SubType	Policy Type	Member Number	Product	Commission Amount
10001100	12345		2022	January	OHIO (OH)	CareSource Marketplace Low Premium Silver 2	Marketplace	Renewal	10410412	Yes	20.00
10000402	23456		2022	January	INDIANA (IN)	CareSource Marketplace Bronze First Dental, Vision, & Fitness	Marketplace	Renewal	10410412	Yes	21.00
10102000	34567		2022	January	INDIANA (IN)	CareSource Marketplace Bronze First Dental, Vision, & Fitness	Marketplace	Renewal	10410412	Yes	21.00
10000402	45678		2022	January	OHIO (OH)	CareSource Marketplace Bronze First	Marketplace	Renewal	10410412	Yes	20.00
10100007	56789		2022	January	OHIO (OH)	CareSource Marketplace Low Premium Silver Dental, Vision, & Fitness	Marketplace	Renewal	10410412	Yes	43.00
10401572	67890		2022	January	INDIANA (IN)	CareSource Marketplace Bronze First Dental, Vision, & Fitness	Marketplace	Renewal	10410412	Yes	21.00

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

Standard (00/00/00)

Policy ID: [Example] Member ID: [ ] Member Name: [ ] Period Year: 2022 Period Month: April Policy Issue State: [ ] Product: [ ] SubType: [ ]

Policy Type: [ ] Member Number: [ ] Product: [ ]

OK Cancel Refresh Filter

Product Commissions (176)

Policy ID	Member ID	Member Name	Period Year	Period Month	Policy Issue State	Product	SubType	Policy Type	Member Number	Product	Commission Amount
10001100			2022	April	OHIO (OH)	CareSource Marketplace Low Premium Silver 2	Marketplace	Renewal		Yes	20.00
10000402			2022	April	INDIANA (IN)	CareSource Marketplace Bronze First Dental, Vision, & Fitness	Marketplace	Renewal		Yes	21.00
10100007			2022	April	OHIO (OH)	CareSource Marketplace Low Premium Silver Dental, Vision, & Fitness	Marketplace	Renewal		Yes	43.00
10100007			2022	April	OHIO (OH)	CareSource Marketplace Low Premium Silver Dental, Vision, & Fitness	Marketplace	Renewal		Yes	43.00
10401572			2022	April	INDIANA (IN)	CareSource Marketplace Bronze First Dental, Vision, & Fitness	Marketplace	Renewal		Yes	21.00

PHI has been removed.

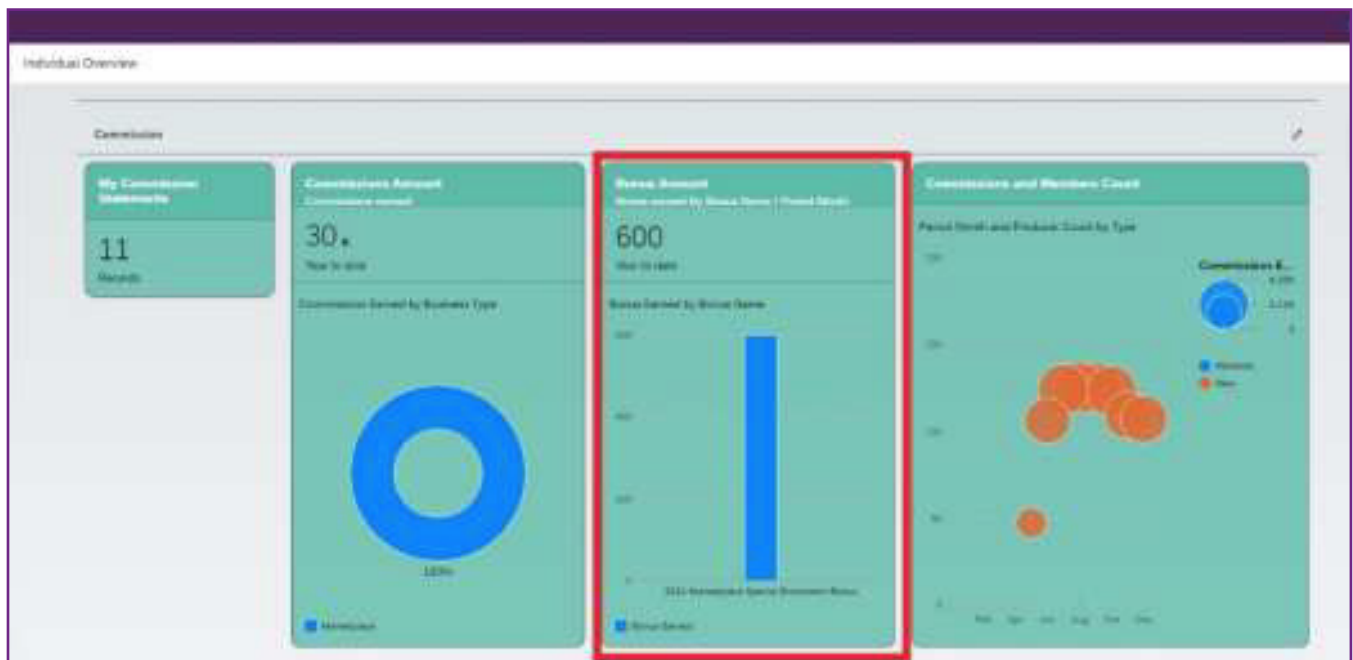


# BONUS AMOUNT

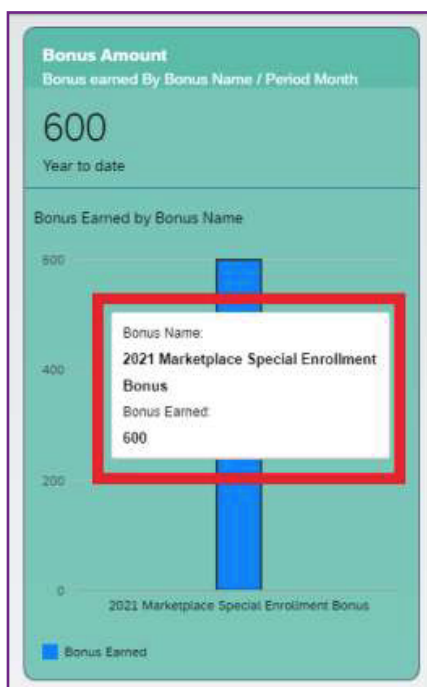
The Bonus Amount Card will provide Bonus earned by Bonus Name and Period Month.

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.

Bonus Name	Period Year	Period Month	Commission Amount	System Status	Date Generated	Finalized
2021 Marketplace Special Enrollment Bonus	2021	December	100.00	Posted	Dec 13, 2021	Yes
2021 Marketplace Special Enrollment Bonus	2021	September	-100.00	Posted	Nov 10, 2021	Yes
2021 Marketplace Special Enrollment Bonus	2021	August	100.00	Posted	Oct 13, 2021	Yes
2021 Marketplace Special Enrollment Bonus	2021	August	100.00	Posted	Oct 13, 2021	Yes
2021 Marketplace Special Enrollment Bonus	2021	August	100.00	Posted	Oct 13, 2021	Yes
2021 Marketplace Special Enrollment Bonus	2021	September	100.00	Posted	Oct 13, 2021	Yes
2021 Marketplace Special Enrollment Bonus	2021	October	200.00	Posted	Oct 13, 2021	Yes

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

Bonus Name	Period Year	Period Month	Commission Amount	System Status	Date Generated	Finalized
2021 Marketplace Special Enrollment Bonus	2021	December	100.00	Posted	Dec 13, 2021	Yes
2021 Marketplace Special Enrollment Bonus	2021	September	-100.00	Posted	Nov 10, 2021	Yes
2021 Marketplace Special Enrollment Bonus	2021	August	100.00	Posted	Oct 13, 2021	Yes
2021 Marketplace Special Enrollment Bonus	2021	August	100.00	Posted	Oct 13, 2021	Yes
2021 Marketplace Special Enrollment Bonus	2021	August	100.00	Posted	Oct 13, 2021	Yes
2021 Marketplace Special Enrollment Bonus	2021	September	100.00	Posted	Oct 13, 2021	Yes
2021 Marketplace Special Enrollment Bonus	2021	October	200.00	Posted	Oct 13, 2021	Yes

A CVS file will be generated.

	A	B	C	D	E	F	G
1	Bonus Name	Period Year	Period Month	Commission Amount	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							

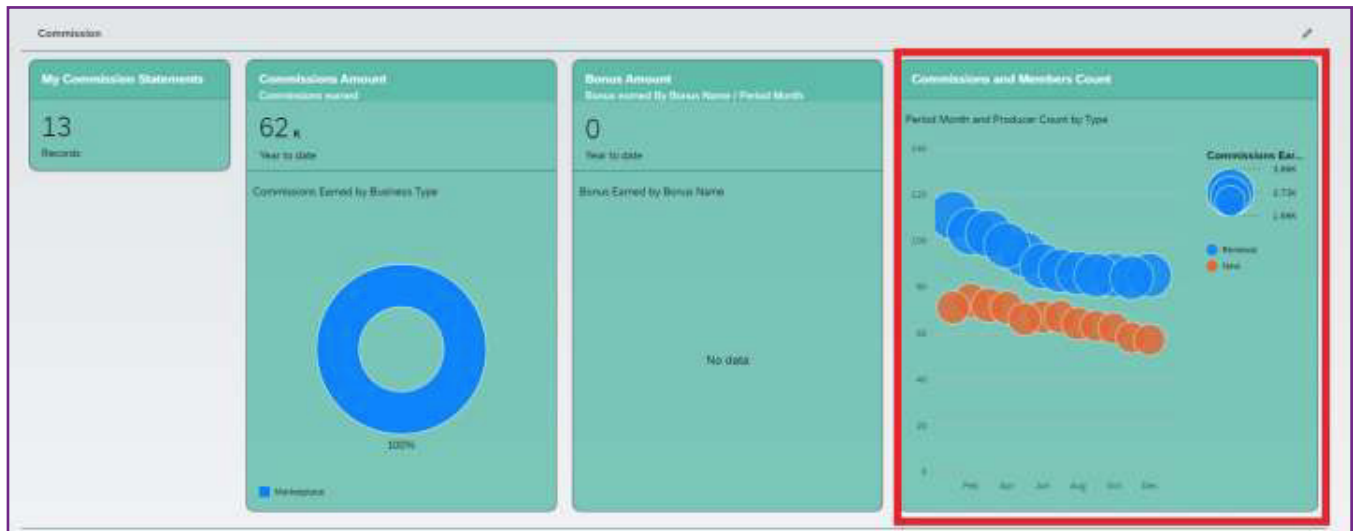


# COMMISSIONS AND MEMBERS COUNT

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.

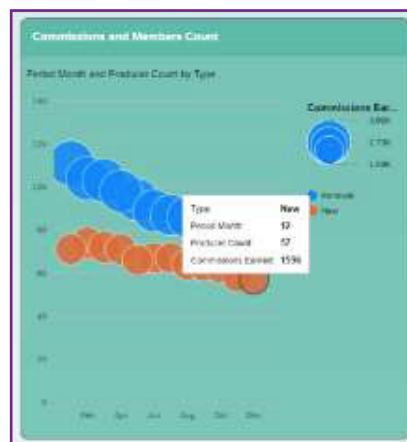
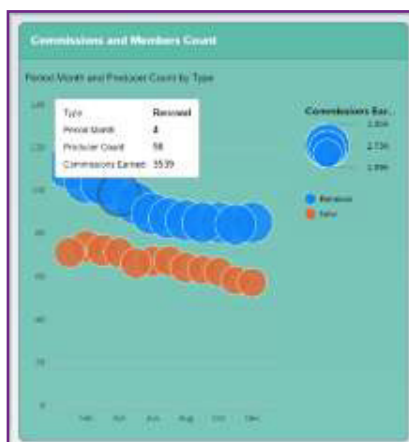


By hovering over the card, you can view specific month information at a glance.

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.

Policy ID	Member ID	Member Name	Period Year	Period Month	Policy Issue State	Product	SubType	Policy Type	Voucher Number	Priced	Commission Rate
			2022	January	OHIO (OH)	CareSource Marketplace Low Premium Silver 1	Marketplace	Renewal		Yes	20.00
			2022	January	OHIO (OH)	CareSource Marketplace Bronze Gold	Marketplace	Renewal		Yes	20.00
			2022	January	OHIO (OH)	CareSource Marketplace Low Premium Silver 2	Marketplace	Renewal		Yes	61.00
			2022	January	OHIO (OH)	CareSource Marketplace Low Premium Silver 2	Marketplace	Renewal		Yes	20.00
			2022	January	OHIO (OH)	CareSource Marketplace Low Premium Silver	Marketplace	Renewal		Yes	20.00
			2022	January	OHIO (OH)	CareSource Marketplace Low Deductible Silver 1	Marketplace	Renewal		Yes	21.00

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.

Policy ID	Member ID	Member Name	Period Year	Period Month	Policy Issue State	Product	SubType	Policy Type	Voucher Number	Priced	Commission Rate
			2022	January	OHIO (OH)	CareSource Marketplace Gold	Marketplace	Renewal	1841643290001004	Yes	40.00
			2022	February	OHIO (OH)	CareSource Marketplace Gold	Marketplace	Renewal	1844613862900000	Yes	40.00
			2022	March	OHIO (OH)	CareSource Marketplace Gold	Marketplace	Renewal	1846882552579000	Yes	40.00
			2022	April	OHIO (OH)	CareSource Marketplace Gold	Marketplace	Renewal	1849705474920000	Yes	40.00
			2022	May	OHIO (OH)	CareSource Marketplace Gold	Marketplace	Renewal	1852310899420000	Yes	40.00
			2022	June	OHIO (OH)	CareSource Marketplace Gold	Marketplace	Renewal	1855444900340000	Yes	40.00
			2022	July	OHIO (OH)	CareSource Marketplace Gold	Marketplace	Renewal	1857527069600000	Yes	40.00
			2022	August	OHIO (OH)	CareSource Marketplace Gold	Marketplace	Renewal	1860262006841000	Yes	40.00
			2022	September	OHIO (OH)	CareSource Marketplace Gold	Marketplace	Renewal	1862860302982000	Yes	40.00
			2022	October	OHIO (OH)	CareSource Marketplace Gold	Marketplace	Renewal	1865458887288000	Yes	40.00

PHI and HIPAA 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.

State	License ID	Expiration Date	Renewal Date	License Type	License Status
NORTH CAROLINA (NC)		9 years ago		Insurance Producer	Active
IOWA (IA)		9 years ago	In 2 years	Insurance Producer	Active
WEST VIRGINIA (WV)		9 years ago	In 1 year	Insurance Producer	Active
INDIANA (IN)		9 years ago	In 1 year	Producer - Individual	Active
OHIO (OH)		9 years ago	In 9 months	MAJOR LINES	Active

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

Insurance ID	Insurance Type	Expiration Date	Insurance Name	Limit Per Occurrence	Limit Annually	File Name	Attachment
0000026003	E&O Insurance	Jun 1, 2023	Admiral Insurance Company	2,000,000.00	5,000,000.00	HealthShare E&O 2021-22 Certificate.pdf	HealthShare E&O 2021-22 Certificate.pdf

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

Insurance ID	Insurance Type	Expiration Date	Insurance Name	Limit Per Occurrence	Limit Annually	File Name	Attachment
0000026003	E&O Insurance	Jun 1, 2023	Admiral Insurance Company	2,000,000.00	5,000,000.00	HealthShare E&O 2021-22 Certificate.pdf	HealthShare E&O 2021-22 Certificate.pdf



# 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.

The screenshot shows the CareSource Individual Overview page. The 'Compliance' section contains four cards: 'Active and Expiring Insurance' (0 Active, 0 Expiring in 90 days), 'Active and Expiring Licenses' (7 Active, 0 Expiring in 90 days), 'Active and Expiring Appointments' (5 Active, 0 Expiring in 90 days), and 'Education' (5 Records). The 'Background Checks' card is highlighted with a red box and shows 1 of 1 record. Below it, the 'Producer Licenses' table is visible.

License State	License ID	Initial Issue Date	Termination Date	License Type	License Status
WEST VIRGINIA (WV)		2 years ago	in 1 year	Insurance Producer	Active
KENTUCKY (KY)		2 years ago	in 1 year	Agent	Active
OHIO (OH)		2 years ago	in 7 months	MAJOR LINES	Active
GEORGIA (GA)		2 years ago	in 7 months	Agent-Resident	Active
GEORGIA (GA)		2 years ago	in 7 months	Agent-Nomadic	Active

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

Example below shows the Background detail.

The screenshot shows the CareSource Background Detail page for 'Background - Onboarding'. The status is 'Active'. The 'Detail Information' section shows: Background Type: Onboarding, Effective Date: Sep 28, 2022, Expiry Date: (blank), Date Requested: (blank), Response Type: 2, Next Renewal Request Date: (blank), PreBackground Reason: Code, and Comments: PASS. The 'Files' section shows a table with columns: File Name, Date Submitted, File Size, User Name, and Attachment. The 'My Tasks' section shows a table with columns: Task ID, Task Name, System Status, Task Type, Priority, Date Created, and Due Date. Both sections display 'No data found. Try adjusting the filter settings.'





# 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.

Individual Overview

Compliance

Active and Expiring Insurance: 0 Active, 0 Expiring in 90 days

**Active and Expiring Licenses: 7 Active, 0 Expiring in 90 days**

Active and Expiring Appointments: 5 Active, 0 Expiring in 90 days

Education: 5 Records

Background Checks: 1 of 1

Producer Licenses: 1 of 1

License ID	License Type	Initial Issue Date	Termination Date	License Status
WEST VIRGINIA (WV)	Insurance Producer	2 years ago	in 1 year	Reactivated

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

Example below shows the license detail.

Standard (default)

Search: Jurisdiction License ID License Type Initial Issue Date Termination Date License Status

OK Cancel

Producer Licenses (7)

License ID	License Type	Initial Issue Date	Termination Date	License Status
WEST VIRGINIA (WV)	Insurance Producer	Nov 25, 2023	Aug 31, 2024	Active
INDIANA (IN)	Agent	Jul 28, 2023	Aug 31, 2024	Active
OHIO (OH)	HAUTE LOIRE	Apr 9, 2023	Aug 31, 2023	Active
GEORGIA (GA)	Agent Resident	Oct 28, 2023	Aug 31, 2025	Active
ARIZONA (AZ)	Agent Nonresident	Oct 28, 2023	Aug 31, 2025	Active
INDIANA (IN)	RESIDENT PRODUCER - INDIVIDUAL	Jan 18, 2023	Aug 31, 2027	Active
INDIANA (IN)	Producer - Individual	Apr 26, 2023	Aug 31, 2027	Active

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

Standard (default)

Search: Jurisdiction License ID License Type Initial Issue Date Termination Date License Status

OK Cancel

Producer Licenses (7)

Jurisdiction: Standard (default)

- GEORGIA (GA)
- INDIANA (IN)
- KANSAS (KS)
- NORTH CAROLINA (NC)
- OHIO (OH)
- WEST VIRGINIA (WV)

License ID	License Type	Initial Issue Date	Termination Date	License Status
Insurance Producer	Nov 25, 2023	Aug 31, 2024	Active	
Agent	Jul 28, 2023	Aug 31, 2024	Active	
HAUTE LOIRE	Apr 9, 2023	Aug 31, 2023	Active	
Agent Resident	Oct 28, 2023	Aug 31, 2025	Active	
Agent Nonresident	Oct 28, 2023	Aug 31, 2025	Active	
RESIDENT PRODUCER - INDIVIDUAL	Jan 18, 2023	Aug 31, 2027	Active	
Producer - Individual	Apr 26, 2023	Aug 31, 2027	Active	





# 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.

The screenshot shows a dashboard with several cards. The 'Active and Expiring Appointments' card is highlighted with a red box. It shows 5 Active and 0 Expiring appointments. Below it is a table of Producer Licenses.

Jurisdiction	License ID	Initial Issue Date	Renewal Date	License Type	License Status
WEST VIRGINIA (WV)	348385-WV	2 years ago	in 1 year	Insurance Producer	Active
KENTUCKY (KY)	348385-KY	2 years ago	in 1 year	Agent	Active
OHIO (OH)	348385-OH	2 years ago	in 7 months	SALES JAMES	Active
GEORGIA (GA)	348385-GA	2 years ago	in 7 months	Agent-Resident	Active
INDIANA (IN)	348385-IN	2 years ago	in 7 months	Agent-Nonresident	Active

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.

The screenshot shows the 'Producer Appointments' detail view. It includes a search bar with fields for Jurisdiction, Appointing Company, Appointment ID, Effective Date, Expiration Date, and Status. Below the search bar is a table of appointments.

Jurisdiction	Appointing Company	Appointment ID	Effective Date	Expiration Date	Status
GEORGIA (GA)	CareSource GA Co	348385-GA	Oct 29, 2021	Jan 1, 2020	Active
WEST VIRGINIA (WV)	CareSource WV Co	348385-WV	Nov 18, 2021	Jan 1, 2020	Active
OHIO (OH)	CareSource OH	348385-OH	Apr 15, 2021		Active
OHIO (OH)	CareSource OH	348385-OH	Apr 15, 2021		Active
INDIANA (IN)	CareSource IN	348385-IN	Apr 15, 2021		Active

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

The screenshot shows the 'Status' dropdown menu. It has a search bar and two options: 'Active' and 'Inactive'. The 'Active' option is selected.



# 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.

The screenshot shows a 'Compliance' dashboard with several cards. The 'Education' card is highlighted with a red border and shows '5 Records'. Other cards include 'Active and Expiring Insurance', 'Active and Expiring Licenses', 'Active and Expiring Appointments', 'Background Checks', and 'Producer Licenses'.

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

Example below shows the Certifications.

The screenshot shows a table titled 'Education (5)' with the following columns: Producer ID, Institution / Facility Name, Education Type, Education Status, Certification Start Date, Certification End Date, and Graduation Date. The table contains 5 rows of certification data.

Producer ID	Institution / Facility Name	Education Type	Education Status	Certification Start Date	Certification End Date	Graduation Date
	CSTRNG	Credentia Medicare Product Certification	Passed	Sep 19, 2022	Dec 31, 2023	Sep 19, 2022
	FFM Certificate	FFM Certificate	Passed	Nov 1, 2022	Oct 31, 2023	Aug 22, 2022
	AHP Certificate	AHP Certificate	Passed	Aug 4, 2022	Dec 31, 2023	Aug 4, 2022
	FFM Certificate	FFM Certificate	Passed	Jan 1, 2022	Oct 31, 2022	Aug 31, 2021
	FFM Certificate	FFM Certificate	Passed	Apr 15, 2021	Dec 31, 2021	Apr 14, 2021

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

Example shows highlighted line to be viewed.

The screenshot shows the same 'Education (5)' table as above, but with the first row (CSTRNG) highlighted in blue, indicating it is the selected certification for detail view.



The example below shows the specific FFM Certification detail.

CareSource

Education Detail for

Education - MKTPLC - FFM Certificate

Education ID: MKTPLC

Institution / Facility Name: FFM Certificate

Education Status: 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 02, 2022

License Type: --

License Class: --

License State: --

CEU Credits: --

CEU Credit Expiration: --

Comments: Obtained from AB\_Registration\_Completion\_List Form data.healthcare.gov on 8/24/2022

Education Reference Fields

Score: --

License Number: --

Company Code: --

CMS Core Training: --

Product / Training: --

Files

Files

File Name

Date Uploaded

File Size

View/Name

Download

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.

The screenshot shows the 'Individual Overview' page with several cards. The 'Producer Licenses' card is highlighted with a red box. It displays a table of 5 licenses.

Jurisdiction	License ID	Initial Issue Date	Termination Date	License Type	License Status
WEST VIRGINIA (WV)		2 years ago	n/a	Insurance Producer	Active
KENTUCKY (KY)		2 years ago	n/a	Agent	Active
INDIANA (IN)		2 years ago	n/a	INSURANCE PRODUCER	Active
GEORGIA (GA)		2 years ago	n/a	Agent/Resident	Active
GEORGIA (GA)		2 years ago	n/a	Agent/Resident	Active

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.

The screenshot shows the 'Producer License Search' page. It has a search bar with filters for Jurisdiction, License ID, License Type, Initial Issue Date, Termination Date, and License Status. Below the search bar is a table of licenses.

Jurisdiction	License ID	License Type	Initial Issue Date	Termination Date	License Status
GEORGIA (GA)		Agent-Resident	Oct 26, 2021	Aug 31, 2023	Active
GEORGIA (GA)		Agent-Resident	Oct 26, 2021	Aug 31, 2023	Active
INDIANA (IN)		PRODUCER - INDIVIDUAL	Apr 15, 2021	Aug 31, 2023	Active
INDIANA (IN)		Producer - Individual	Apr 15, 2021	Aug 31, 2023	Active
KENTUCKY (KY)		Agent	Jan 25, 2022	Aug 31, 2024	Active
WEST VIRGINIA (WV)		INSURANCE PRODUCER	Nov 25, 2021	Aug 31, 2024	Active

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.

The screenshot shows the 'Producer License Search' page with the 'Jurisdiction' dropdown menu open. The menu lists several states, with 'GEORGIA (GA)' selected. The 'OK' button is highlighted with a red box.

**Standard (default)**

Jurisdiction: **GEORGIA (GA)**

- ☒ GEORGIA (GA)
- ☐ IOWA (IA)
- ☐ INDIANA (IN)
- ☐ KENTUCKY (KY)
- ☐ NORTH CAROLINA (NC)
- ☐ OHIO (OH)
- ☐ VIRGINIA (VA)
- ☐ WEST VIRGINIA (WV)

**OK** Reset Adapt Filters (2)



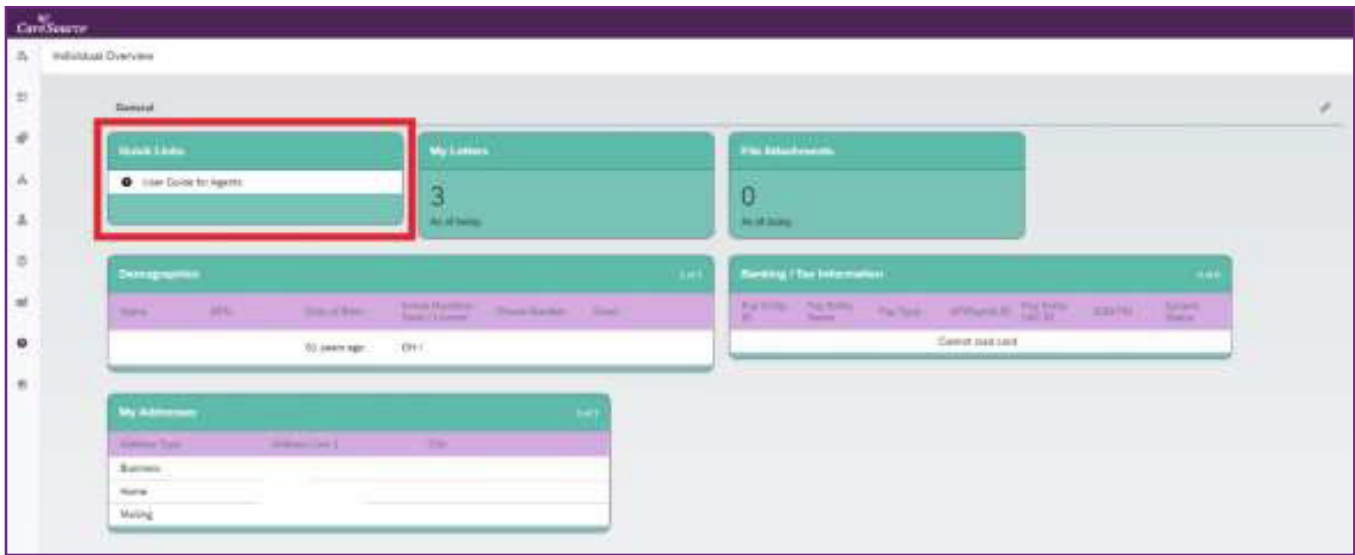


# QUICK LINKS

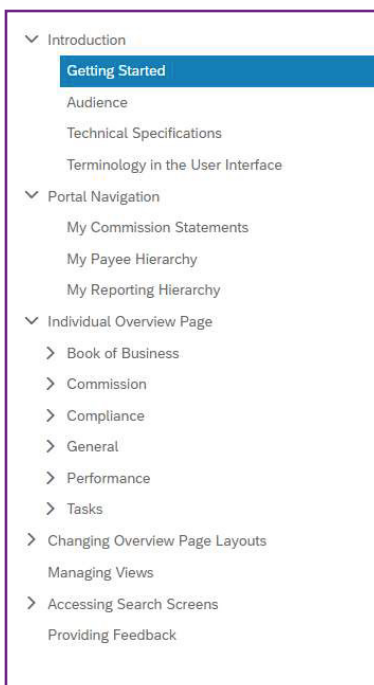
The Quick Links Card will provide links to useful documentation.

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.

The screenshot shows the 'My Letters Card' highlighted with a red box. It displays a count of 3 letters. Other cards visible include 'Quick Links', 'Attachments', 'Demographics', 'Billing / Plan Information', and 'My Address'.

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

The screenshot shows the 'Letter History Search Results' page. The table lists three letters with dates: Aug 18, 2022, Aug 5, 2022, and Apr 7, 2022. The 'Letter History (3)' link is highlighted with a red box, and the 'Attachments' column for the first letter is also highlighted with a red box.

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.

The screenshot shows the details of a letter dated 8/18/22. The letter is addressed to 'Helen' and contains information about a license renewal. The footer includes the CareSource logo and contact information for the Bureau of Health Services.

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.

Individual Overview

General

Quick Links

- User Guide for Agents

My Letters

3 As of today

File Attachments

0 As of today

Demographics

Name	NPN	Date of Birth	Active Resident State (License)	Phone Number	Email
		82 years ago	OH		

My Addresses

Address Type	Address Line 1	City
Business		
Home		
Mailing		

Banking / Tax Information

Pay Entity ID	Pay Entity Name	Pay Type	APR Payment ID	Pay Entity LLC ID	SSAN ID	System Status
						Current load card

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.

Demographics Detail for

Demographics -

Producer ID: \_\_\_\_\_ Name: \_\_\_\_\_

Detail Information

Name	NPN	Date of Birth
		Aug 18, 1962

Phone Number: \_\_\_\_\_ Email: \_\_\_\_\_

EDIT

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.

The screenshot shows the CoreSource Individual Overview page. The 'My Addresses' card is highlighted with a red box. It displays a table with columns for Address Type, Address Line 1, and City. The table lists three addresses: Business, Home, and Mailing.

Address Type	Address Line 1	City
Business		
Home		
Mailing		

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

Click into each address to view and Edit if needed.

The screenshot shows the CoreSource Address Detail page for a Business address. The 'Edit' button is highlighted with a red box. The page displays various fields for address details, including Address Type, Address Line 1, City, State, Zip / Postal Code, and Contact Information.

**Address - Business**

Address Type: Business

Full Name

**Detail Information**

Use This Address For: -

**Mailing Address**

Address Type: Business

First Name: [Redacted] Middle Name: [Redacted] Last Name: [Redacted]

Name Suffix: - Attention: [Redacted]

Address Line 1: [Redacted] Address Line 2: [Redacted] Address Line 3: [Redacted] Address Line 4: [Redacted]

City: [Redacted] State: [Redacted]

Zip / Postal Code: [Redacted] Country: USA

**Contact Information**

Contact Name: [Redacted] Office Phone: [Redacted] Fax: [Redacted]

Mobile: [Redacted] Contact Email: [Redacted]

**Alternate Contact**

Assistant Name: [Redacted] Alternate Contact Phone: [Redacted] Assistant Email: [Redacted]



# 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.

The screenshot shows the 'Individual Overview' page in the CureSource system. The page is divided into several sections: 'General', 'Demographics', 'My Addressess', 'My Letters', and 'Banking / Tax Information'. The 'Banking / Tax Information' section is highlighted with a red box. It contains a table with columns: 'The Order ID', 'The Order Name', 'The Type', 'The Order ID', 'The Order ID', 'The Order ID', and 'System Status'. The table has one row with the value 'Carnet card card'.

The Order ID	The Order Name	The Type	The Order ID	The Order ID	The Order ID	System Status
						Carnet card card

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

**Tools & Resources**

Resource
Training   CareSource
Plans & Services   CareSource
Marketing Materials   CareSource
Find My Prescriptions   CareSource
Find a Doctor   CareSource

**Product Guide Download**

Name	Content Type	Download
ProductGuide	pdf	<a href="#">Download</a>

**Enrollment Portals**

Enrollment Link
2023 Medicare Enrollment Portal
Marketplace Self Service Enrollment Portal

**Product Resource Access**

Resource Link
Broker Service Department
Member Services Phone Numbers
Order Marketing Materials
Medicare Product Certification Training

**Legal Disclaimers**

Name	Content Type	Download
Legal & Compliance	HTML	<a href="#">Download</a>

Examples:

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

## TRAINING

Getting started selling CareSource products? Just need a refresher on how to use our tools? Preparing for an upcoming enrollment season? Here you'll find the training you need to get you up to speed.

### Marketplace Enrollment Portal Training Video

Learn how to enroll new members through the CareSource Enrollment Portal, powered by HealthSherpa.

[LAUNCH TRAINING](#)

### Marketplace Online Enrollment FAQ

Find answers to frequently asked questions about the HealthSherpa powered Enrollment Portal.

[READ THE GUIDE](#)

### Marketplace Revenue Cycle Operations Guide

Review this overview for the Marketplace enrollee and member payment process, invoices and grace periods.

[READ THE REVENUE CYCLE GUIDE](#)



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.

Producers Overview

GET CONTRACTED

BROKER SERVICE DEPARTMENT

PLANS & SERVICES

TRAINING

TOOLS & RESOURCES

QUICK LINKS

Apply To Become A Broker

Marketing Materials

Marketing Online Enrollment Guide

Producers Training Materials

PLANS & SERVICES


MARKETPLACE

CareSource was the first Marketplace insurer to receive an application at its launch in 2014 and since that time, we've covered counties as the only Marketplace insurer when all other insurers pulled out. We are committed to serving those who don't have insurance through their employer and don't qualify for other government programs.

Visit our Marketplace plan pages to learn more about our plans. To easily find benefit details on the plans we offer, visit the plan documents page for the plan type about which you are inquiring.

Service Area

Adams, Allen, Ashland, Athens, Auglaize, Brown, Butler, Carroll, Champaign, Clark, Clermont, Clinton, Columbiana, Coshocton, Crawford, Cuyahoga, Darke, Delaware, Delaware, Erie, Fairfield, Fayette, Franklin, Fulton, Gallia, Geauga, Greene, Guernsey, Hamilton, Hancock, Hardin, Harrison, Henry, Highland, Hocking, Holmes, Huron, Jackson, Jefferson, Lake, Lawrence, Licking, Logan, Lorain, Lucas, Madison, Mahoning, Marion, Medina, Meigs, Mercer, Miami, Monroe, Montgomery, Morgan, Morrow, Muskingum, Noble.



2022 Service Area

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.

MARKETING MATERIALS

Select a State



Georgia



Indiana



Kentucky



Ohio



West Virginia



North Carolina

Tools & Resources

NEWSLETTERS

MARKETING MATERIALS

QUICK LINKS

Apply To Become A Broker

Marketing Materials

Marketing Online Enrollment Guide

Producers Training Materials

MARKETING MATERIALS

If you would like printed copies of any of these materials, please use PrintSource to order them. If you have encountered but have not yet received your PrintSource login, please contact our Broker Service department. Please see the PrintSource Quick Reference Guide for instructions on how to order materials.

Broker Compensation Disclosure Form

NEW! BCD FORMS AVAILABLE FOR ORDER NOW

NEW! BCD FORMS AVAILABLE

CareSource Dual Advantage Plans

2023 Forms, KRs, Fliers, Presentations & Brochures

Find Your County Below



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

Tools & Resources

QUICK START GUIDE

QUICK START STEPS FOR NEW MEMBERS

FIND A DOCTOR

WHERE TO GET CARE

FIND MY PRESCRIPTIONS -

Overview

Find A Pharmacy

Medication Therapy Management

RENEW YOUR BENEFITS

FILE A GRIEVANCE OR APPEAL +

CAREGIVER RESOURCES +

FORMS

FIND MY PRESCRIPTIONS

Select a Plan

Select your plan below to view more information!

Dual Special Needs  
(Medicare + Medicaid)

Medicare Advantage (OH)

Medicaid

Marketplace

MyCare (OH)  
(Medicare + Medicaid)

Planning for Healthy Babies (GA)

CareSource PASSE (AR)

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

CareSource

FIND A DOCTOR

With more than 100,000 network providers across the coverage areas, and depending on your plan, you have plenty of choice when it comes to finding the best care available to meet your health needs.

Get Started

Skip

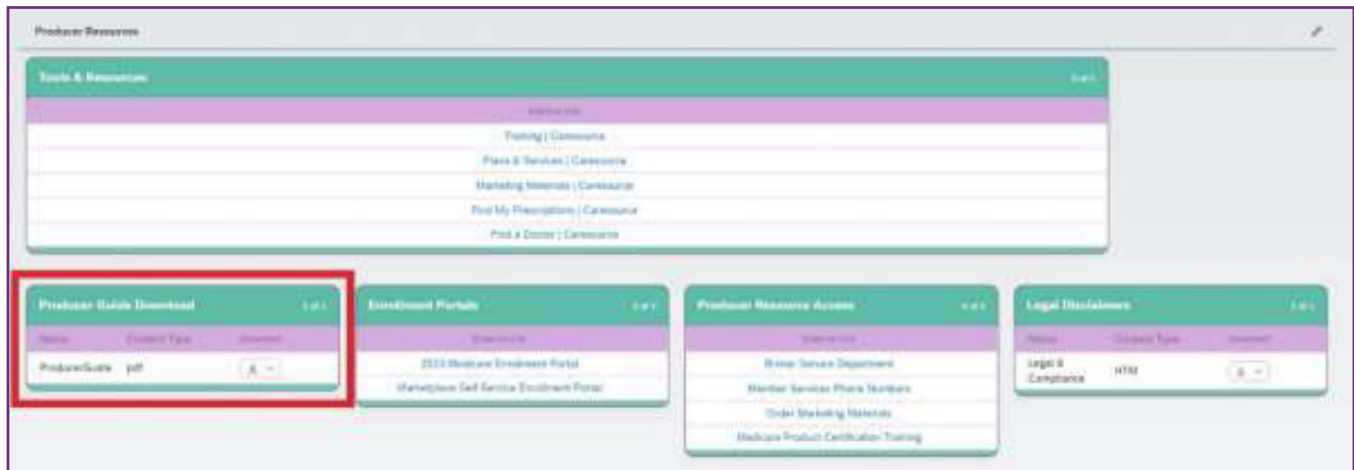


# PRODUCER GUIDE DOWNLOAD

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

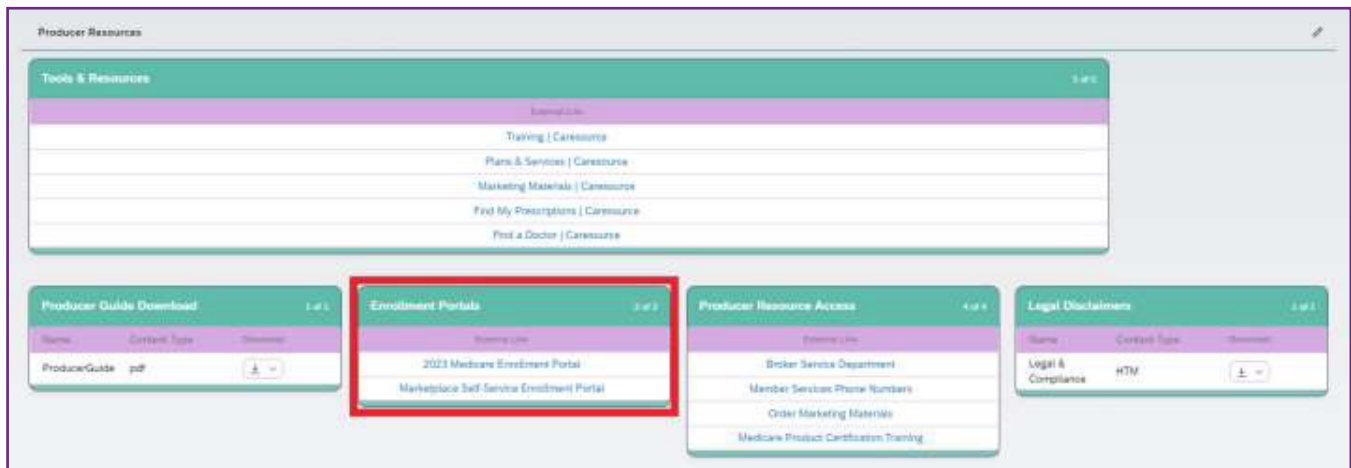


# ENROLLMENT PORTALS

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

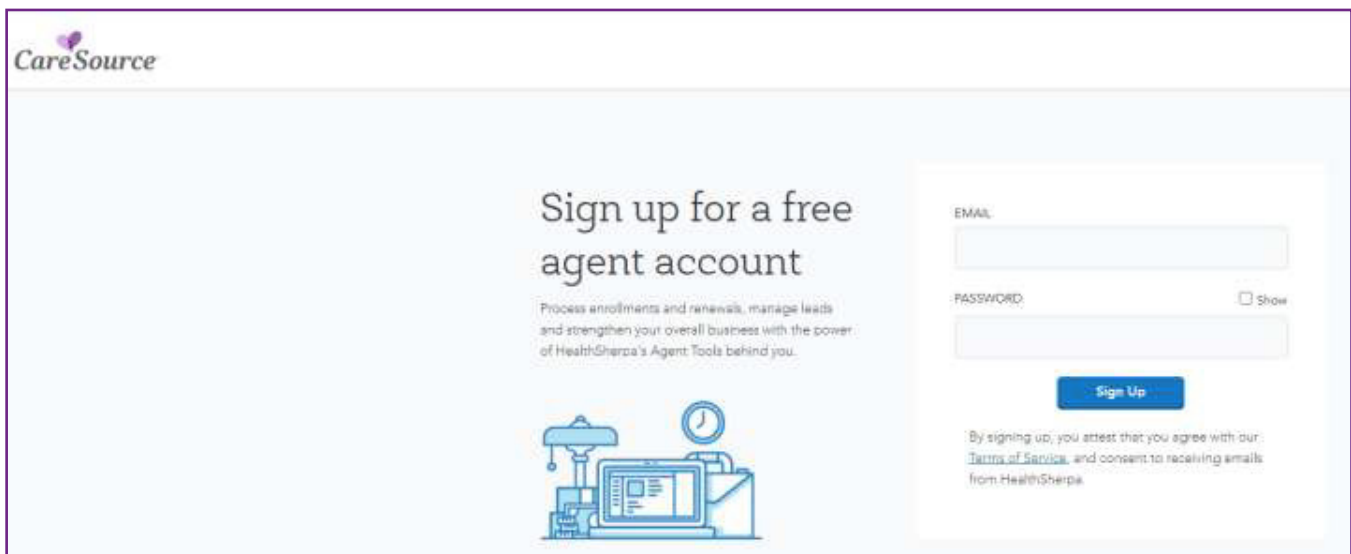
To access your Enrollment Portals links:

- 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.

The screenshot shows a 'Producers Resources' dashboard. At the top is a 'Tools & Resources' card with links to Training, Plans & Services, Marketing Materials, Find My Prescriptions, and Find a Doctor, all leading to CareSource. Below this are four resource cards: 'Producer Guide Download' (with a PDF download link), 'Enrollment Portals' (with links to 2023 Medicare Enrollment Portal and Marketplace Self-Service Enrollment Portal), 'Producers Resource Access' (highlighted with a red box, containing links to Broker Service Department, Member Services Phone Numbers, Order Marketing Materials, and Medicare Product Certification Training), and 'Legal Disclaimers' (with an HTML download link).

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

Example below shows the Brokers Service Department link.

The screenshot shows the CareSource website. The navigation bar includes links for Plans, Members, Providers, Producers, and About Us. A red banner below the navigation bar reads 'WANT TO SELL CARESOURCE? SELECT YOUR GENERAL AGENCY!' with a 'LEARN MORE' button. The main content area is titled 'BROKER SERVICE DEPARTMENT'. On the left is a 'QUICK LINKS' section with links to 'Apply To Become A Broker', 'Marketing Materials', and 'Producers Training Materials'. The main section features a 'Select a State' heading with five state icons: Georgia, Indiana, Kentucky, Ohio, and West Virginia. Below this, text explains that CareSource has a dedicated Broker Services department to support individual producers throughout the agent lifecycle, facilitate the contracting process, and manage commissions.





Example below shows the Member Services Phone Numbers link.

The screenshot shows the 'Member Services Phone Numbers' page. The left sidebar contains links for 'Member Overview', 'TOOLS & RESOURCES', 'CONTACT US', and 'QUICK LINKS' (My CareSource). The main content area lists phone numbers for various services: OHIO (Medicaid, Medicare Advantage, MA - Dual Special Needs, Marketplace, MyCare), KENTUCKY (Marketplace), and Community Transition Program (CTP). Each service includes its phone number and operating hours.

Example below shows the Order Marketing Materials link.

The screenshot shows the CareSource login page. It features the CareSource logo at the top, followed by a 'Sign in' section with input fields for 'User id' and 'Password', and a 'Login' button. Below the login fields, there is a link for password resets and a note stating that users must be actively contracted and appointed agents with CareSource to access sales materials.

Example below shows the Medicare Product Certification Training link.

The screenshot shows the login page for Medicare Product Certification Training. It includes a purple heart logo and a prompt to enter a username and password. There are input fields for the username and password, a 'Show Password' checkbox, a 'Remember me on this computer' checkbox, and a 'Login' button. A link for 'I've forgotten my username/password' is located at the bottom.



# 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 screenshot shows the 'Producer Resources' page with a table of links and four download cards. The 'Legal Disclaimers' card is highlighted with a red box.

Name	Content Type	Download
ProducerGuide	pdf	[Download icon]

Name	Content Type	Download
Legal & Compliance	HTM	[Download icon]

This is a close-up of the 'Legal Disclaimers' card. The 'Download' button, which includes a download icon and a dropdown arrow, is highlighted with a red box.

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

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