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.

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

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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.

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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

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

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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.

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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.

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			denote	14 1 M
			-	80.0.00
And and a state of the			Name of Street o	And A

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.

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		Capital Country in 1995
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POLICY SALES OVER TIME

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

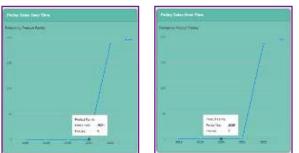
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To access your **Policy Sales Over Time**, click on the card.

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

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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.

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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.

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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.

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

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

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	Standard (Sofault) —											
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	Last Paris Cate: 10/27/2022				CaraSource Manietplace							

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

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YEAR TO DATE POLICY SALES

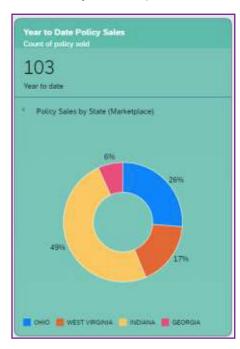
The Year to Date Policy Sales card will list your policy count for the current year.

To access your Year to Date Policy Sales:

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

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	0 103			

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.

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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.

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Continue to	aritetylisco Line Declarable Stars						

CUSTOMER SALES

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

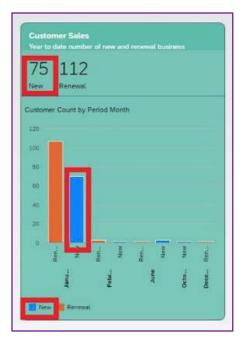
To access your Customer Sales Detail:

• 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.

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	land One-star	
-		1
	and the second s	
* * *	25 <u>112</u>	
	Tantoar d	

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

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

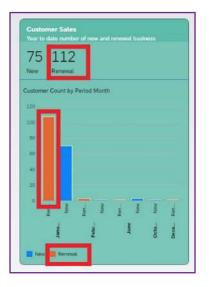




When clicking on **New**, the details are provided for all New Sales.

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



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

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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.

Commission			
My Commission Statements	Commissions Amment	Benus Ammunt - Rome centel fly String Terms (Period Menth	Commissions and Members Court
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	Conserve Entry Balance Type	Henric Exercit by Denic Notes	

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.

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Standard -									
Frank Dirth; ID:	Page Mare	Parcellan		manual Phate	Primer Martin	Deter Generation			
	- #	#	+ 0			-	 -	Robert Con	
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		Enternal Payment		2022	March	Mar 7, 2022	1		
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		Around Facual		2023	Delamine	Der 18 2002	1		



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

Payee Entity ID:	Payee Name	Payout Type:	Process Year:	
	đ	ð	 2022	
			2024	
			2023	
Commission Statements	(13)		2022	
Pages Entlig10	Paies Norm	Passial Type	 2021	

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

47 (F) \$ By Process Mo Date Generated Jan 10, 2022 January ± ~ Feb 11, 2022 ± ~) February March Mar 7, 2022 (± ~) April Apr 11, 2022 1 ~ Σ May May 10, 2022 ± ~ June Jun 14, 2022 (± ~) July Jul 8, 2022 (± ~)) August Aug 11, 2022 1 v) 5 Sep 10, 2022 (± ~) September 5 October Oct 10, 2022 (± ~) November Nov 14, 2022 (± ~) y Dec 9, 2022 December <u>+</u> ~ $(\pm \ \ \ \ \)$ Dec 14, 2022 December

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

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

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Statemen	t Commiss	uons (136)															
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				094	Conforma Managina	Dec 31, 2020,	Der, 95, 31(1), 100-00 (PM		20003	120303	iter.			1.1	15.00		

COMMISSION AMOUNT

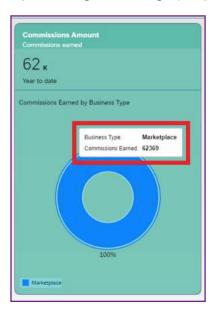
The Commission Amount Card will list the total of current Commissions earned.

To access your Commission Amount Details:

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

Tanamatan			
13	62.	D D D D D D D	Community and Hermitery County Protocology Stationary County Space 19
		Street Torrect In Street Torrect Torrect	
			i Karana yanan

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.

 Prolition Commit 	silan Search:	for:													
Dandard 1941	ωų														
Party 12		Martin 2		Metter Same		Parried Tax		Parent Marries		Posts have free		Pedat		Core.	
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The example below shows the filtering option for Period Month April.

nehe	ource.												
	 Produce Commission 	im Sharth	tor										
	Standard spring	á -											
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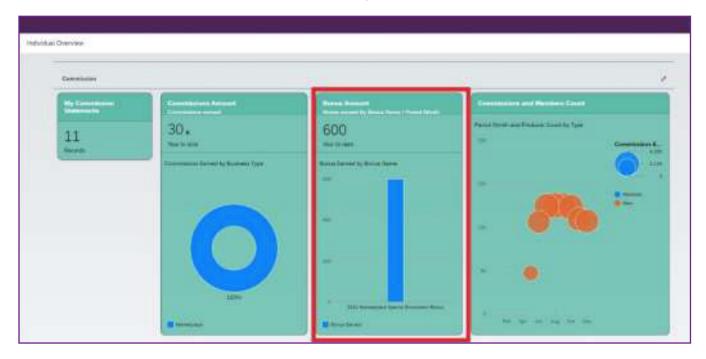
PHI has been removed.

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.

Rend Street	Period Nam	Participant.	System Dates		Traban	
Send fame	17 JULY	Parist Medi	System Galary			-
			-1 A		1	
Bornes Westery (7).	-					4 10 6
Street Sector	Tata Da	Availant	And and a state of the local division of the	Subre Insta	Concernent Section 201	sent frame
DOI Maintpaire Dante Destinant Bona	20.	December	100.00	Porter	Per d	1.2001 He
2021 Madetalara Apartai Receiver Acean		Injuste	100.00	Postid		0.3223 - 1994
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2022 Meretpani Specie Devicent Brina	.3983	Next.	105.00	Forst	394	1.00/1. We
2021 Marterpiece Special Descriptions Review		Testarter	101.00	Ported		2.2121 Yes
2021 Metergan Special Destinant Bunal	- 20	Sendor .	10.10	Prest		1.021 We

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

Bana Sama	Partici Test	Pariod Home	Tyrinei Status	Protect	
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Barren Wybery (1)					
No. of Concession, Name	Constraint Sector	Responses,	i the second second	Marriel Street .	Destantant, Process
2021 Managines Sparine Encounted Roman	301	Desertion	201.00	False	54.11.001 Her
2523 Manufactor Speciel Environment Revisit		hanne	100.00	Pase	No. 21, 2221 No.
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2021 Management Special Excelored Roman		Ner	940.00	Partei	(00113,0001), Yes
2021 Weisspeck Specie Discover Bread	325	hart	90.00	Farmer	0m102.0001 me
2023 Manufacture Search Research	301	Interior		Aust	Get 25. 2/201 Tex
2021 Marineginia Space Emolecuer Renai	2012	Dutter	100.00	Panel .	-0x1.13, 2021 Here

A CVS file will be generated.

	А	В	с	D	E	F	G
1	Bonus Name	Period Yea	Period Month	Commission Amour	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:

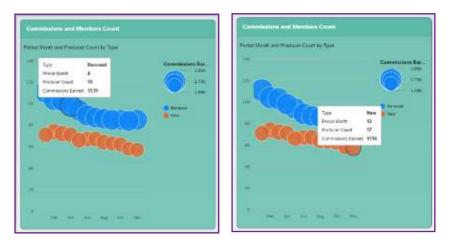
• Click on the Commissions and Members Count Card.

Commission			/
My Commission Statements	Commissions Amount Commission natural	Bonas Artistanti Bases cannot By Bases Nume / Period Metty	Commissions and Members Count
13 hearth	62 x New York Date	O True to claim	Pertor North and Photocer Count by Type (1) Commission Edu., 100
	Conversionmen Tage	Burner, Earned by Bener Name New data	

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.

Putty ID		Nerile ID	Verse line		Feidd Year	Period World.	Punyl	star litere	Polat	Builippe.	
(inamprovil) +		0			2022			(DH) + -			0
hatay Type		Veather Humber	finalized.							-	
		0		-			and the second sec				- Page Part 12
						(d)					
Produkse Commi	olans (1994)				-						2.16.8
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			3122	Jahany	and conj	Careflound Morkeylack Low Premusi Store Dantal, Vision, S. Pitrant	Menerganos	heread.		796	
			3412	<i>benity</i>	(3+63 (3+)	Careforms Manaplace Low Premium Blues 2	Managiaca	Bernat		via.	
			112	linisty	CHIC ((04)	Carefulouse Hartreplace Live Premium Silver	than-expanse.	Reveal.		Vez	- 3
			3422	January	(1680) (1686)	Carellacture Marinetyters Line Decharthie Silver 3 Decharthie Viscon, & Provent	Matherpise	hereas.		164	3

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:		Marther	¢.	Meetine Tiarrest		Period Year	Partial Months		teres blater	Product	Ruitper	
(renetyr) +	- #		æ.			2013 -		- 0+E	- veto	Calefronte M. +	-	. 6
Potcy Types		Vexchel		Fruitied						-	_	
			8									nar Adaption 3
							N.R.					
Postate Canada	City oralis											2 35 8
- 0 juni	Anna and		Station Assoc	(Press) (Press)	2-11-	off Pring Street Light	Page 1	Ballan	Print, Tare	Sector Sector	Preside	(1)
				3822	January.	0H0 (0H)	Care/Source- Marketplace Gene	Materrystatio	Reneval	1441442290001009 6	Yes	
				110	fairces	0403040	Careflource Manaptace Genil	Marietplace	Revenuel	16440/13967030000 C	Yes	
				202	March	0490 (040	Carellisotoe Manarptace Gend	Managence	Berenal	12-Hildon/2879008 0	Yes	
				280	April .	0440-0040	Carefronce Managliace Gast	theneigtain	Paneval	1547705474529008 C	des .	
				2423	May	0400-0040	Carelloutere Managalane Gant	Managiate	Referenti	1892300839442008 0	Vez	
				2013	340	040.000	CeteSoutia Harintpiece Geol	Maneplate	Re-mulai	LK552(444H003400H C	Ves.	
				3942	4.8y	CHO,CHI	CareSouton Managalace Galij	Managonie	Haransal	1887527069609009 C	Yes	
				3122	ngre	040,040	Carellource Marketplace Gold	Manuficace	Received	1840262004841056 0	764	
				2510	Tepterda	040,010	CaleBource Managines-Good	Materplate	Received	1863800300#82008 0	Yes:	
				212	Ontoine	0140-0040	Liawinaurae Managhtana Gang	Manegiace	Revenuel	Lastation/parme	Ves	

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.

Active and Expiring Insurance	Active and Expiring Licenses		Active are	t Explicing Approx	denerte:	Education
1 O Active Experign Without	7 0 Active Tapeng e Million		and the second se	0 Learnig in Wilcom		3 Auroch
Declander Live	Producer Literates					
Referent fair Bata	Andrew General	I heating the	Terrand Dir.	i lines like (A Concession of Concession, Name	
The data	NORTH CAROLINA (NC)	0 years ago		Produce Produce	Active	
	ICIVIA (IA)	9 years ago	in 2 years	Producer	Active	
	WEST WINGHIA.	3 years ago	in 1 year	Insurance Producer	Active	
	PROMINA (21)	9 years ago	in Lynn	Produzer Individuali	Áctvé	
	CHIO (DH)	2 years ago	to 9 months	MAJOR LINES	Active	

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

 Producer Insulance Se 	earch for								
Standard (default)	-								
Insurance Type:	Ŧe	mation Date:	Insurance Name.		Statut				
	· · · · · · · · · · · · · · · · · · ·		(R)	8	Active +	-	C	Angel	Piners (
		0	(=)(1	1					
Producer Insurances	2)							e 19	
Transmis ID	Provens San	Calculate Long	Press and Parcel	Land Net Date	para horas in	The Sector .	a de la companya de		
	840 Insurance	Aut 1, 2023	Administ Insurance Company	2,000.000.00	9,000,000,00	Centroms.pdt HealthSherps END 20172-2022/Centroline.pdf			

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

eeran (1)	-	proston Date		ē)	Name (1917)		Stew Ø Amer		•	-	1. 1. a.	
eren (1)					21				-			
ences (1)												
Transmission of Concession of	lyine	2.00	rates find	Province Name		Loss Pro Diama	Ded. Arresto	Proc. Name		- Phone State		
			Am 8.3033	Admost Insurance Company		2.000.000.00	5.000.000 in	Personal State and Construction and Personal State	100-22 -000	-		
		Ball Inserves							R BAD Imagenes Are L. 2023 Allmost Imagenes Company 2.000.000 all 5000 000 all Contrary and this 202 2023 42 Head Ministry 500 2014	R EAD Inservers Are L. 2023 Allmost Inserver Company 2.000.002.00 1000000 EAD 2023 12 Contrary attracted Owega EAD Inservers EAD 2023 12 Contrary attracted Owega	a Ball Inserver Jan E 2023 Annual Inserver Company 2,000,000 all 5000,000 all Contrary 410 (2023 12) Contrary 410 (Contrary 410 (Contry 410 (C	mattriana FK2 223, 23

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.

indvi	dual Overview						
	Compliance						
	Active and Depiring Insurance	Active and Expiring Linesee		Active act	f Capiting Appus	mana (Education)
	0 0 Antree Exercises III days	7 O Anna Exerna or RE days		5 () New York of the s		5 Records
	Buckground Checks 1 of 1	Producer Literates		0111			
	Radgetond Sport Holds	Assessment Adventation	wanted in some filters.	Three against Date:	Lines Spa	Lines Set 1	
	Observing Active	WEST VIRGINA (WV)	2 years ago	i=1 year	Producer	Adva	
	N	RENTUCKY (KY)	2 years ago	miyee.	Agent	Active	
		040(04)	2 years ago	ie 7 manthe	MAJOR LINES	Active	
		GEORGIA (GA)	2 years ago	in 7 months	Agent Basident	Active	
		GEORGIA (GAL	2 years ago	in 7 months	Agent- Normaldere	Active	

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

Example below shows the Background detail.

wee								
Background Detail to								
Background - C	Oboarding							
Status					Badagenarol Type:			
			(=\'a					
Detail Information	n		1.1.1					
Berkground Typ	n		Effective Date: Sep 23, 2022		Espiry Dana: -			
Cate Requisite	- bi		Response Type 2		Next Renewal Request Date:			
Profact grant Reeso Col	n		Cammunita PASS					
Files								
Files								
The Name .		Date had	Realised	The Name of Street Woman			and the second	
			His data tound. Thy actuating	g for life setings				
My Tasks								
My Tasks								
Tani ID	Task Specie	States Salar	Said Spice	Provide -		They Coulom		
			No data found. Try adjusting	g zhe Mar settings				1



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.

-	vithaat Orienteen			
ŝ	Despheres			
1	Active and Expering Income	Suffree and Digiting Instant	Butter and Payming Approximates	(manadate)
	0 0 Anna Francas Bonn	7 0	5 0	5
6	(and a second se	And Street, St	-	
	And and the Owner	Constant Description (1998) and the	the second part of the second have	
	Careful Alter	TEST (ORIDAA E performance)	etjer Raise Atta]

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

Example below shows the license detail.

Stendent (mmum -										
Arbitist	Lorence D	Liteme Type:	Portar mass Date:	Secondaria (Inter	Garage Dama					
	+ [#) (B Adura			-	-	
			(*)(#)							
Produce Linesco (1)								*12	e n	٠
and a second second	Long C	Second Spin -		THE PART AND	training inc.	Address of the	-			
N\$57 Verplat any		- Treasury Producer		Wy 25, 2123	48.11.204	Activi				
C ADDIVIDUO		April		Aux 39, 2023	4,810,004	Apple				
CI (H9030H)		OKUDE LINES		mpr 8, 2023	54.1.202	8.54				
C ARCHIGALGA		Agentification		iter 29. 2123	Ag 11, 2025	1000				
SACREGA(SA)		Apert Streambert		See 34, 2523	448 11, 2015	475.0				
CT NEALAN (1)		RESIDENT PRODUCTS		Apr 10, 2023	441.001	Artes .				
FEMALON		Pressed - Information		Apr (8, 2003	4-g 11, 3131	Arrival.				

To filter by state, select from the Jurisdiction dropdown.

Arentes	Contraction State	Loopene Spee	Industries Date:	Secondres Date		Linewise William		_				
		(#) ····································			3	Appa +	-	68	-			
C ODMINA (SAL			- 14									
										2 IN		
C PUBLICA (19)	-			Total Inco Total			-		-	-	-	
() edoptization (##P)	Contract in contract in contract in the local diversity of the local	manus take				Name and Address of the Owner, Name of Street or other	_	-				
10 HONTH CAROLINA (ND)		Instantia President		Nev 25, 2023.		Aug 20, 2004	Acces					
C 040/04		Agent		Art-10, 2021		Ag 31, 2024	Action.					
		weath units		Apr 9, 2021		Hig 11, 2123	Acte.					
MEAL INSTANT (MM)		Agent Basileri		NVC 98, 2022		Aug 11, 2022	Active					
Salowaki Kaké		Agent Sussailant		2012/06.2022		No.11.000	Adus -					
ADMAR 310	1.2	HESTERN PRODUCTS	ingertpilat.	Jun 10. 2025		44.11,7073	Acres .					
REAMA INC.		Parket Paletas		Aur 16, 2011		Aug 21, 2020	Acres 1					

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.

Active and Exploring Insurance	Active and Expring Linesee		Active an	I Repairing Annual	nie te	discounter .
0 0 Active Capitry = H Aven	7 0 Anne Extrago Robert		5 tetra	O Tageng in 10 mays		5
Background Cherke (1+)	Province (Linesee)				eet.	
 Resigned Spin State	Andrew House	and tree lies	- Territoria Tata	Lines Said	Linkson Station	
Churchy Activ	WEST VIRGINA	2 peers ago	w 3 peer	Producer	Active .	
	RENTUCES (RIT)	2 years ago	in Lynnt	Agent	Achie .	
	0HID (DH)	2 years ago	In Trapolitie	MALOR LINES	Active	
	satolegia (ski)	3 peaks ago	in Yeardin	Agent Resident	Active	
	USDRUA (SA)	2 peres ago	in Trivertha	Agent. Normalitani	Albre:	

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.

100	u-exchange	Appointing Campanyi	Appointment Etc.	Effective Date	Expitation Date:	States					
	1.4		8	9		9	~ 6	3		in the second	i.
				(=)(d))							
											2
	oliator Appointeneries (5)							-	-	-	-
	Aphile	Papersong Company	Approved II		Difference Dates	Taxana Dan	Same.				
	GEORGIA (GA)	Cerescurce GA Co.	34mth-G4		Ort 29, 3025	Det 1, 2200					
	WEST VIRGINIA (WV)	Caraboura W W-Co	3400055 WV		Nov 18, 2021	Jan 1, 2200					
	CH02 (DH)	Earenource OH	Summetti OH		Apr 33, 2023						
	0H(0(0H)	Caresource OH	SARINES OH		Apr 19, 2721						
	INDIANA (IN)	Carefornia Pr	3020381		Apr 15, 2023						

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

	Status:						
蔵	1	ОК	Rene	i Ai	dagst Fil	tters (1	3
	Active						-
	InActive						
		-	10	1T	(F)	de l	D.



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.

Active and Expiring Insurance	Active and Expiring Licenses		Active wes	Expiring Appuir	and the second se	- Constant
0 0 Active Express in 90 days	7 0 Active Expering in 50 mays		5 (Adher F) Sphing in 97 days		5 Recom
Background Cheeks () of).	Producer Literases				141	
Bantgeneti New Statu	Laster Laster III	Induitional Date:	Normalities Carle	And Street of Concession, Name	Linne Saur	
Obcarding Active	WEST VIRGINIA. (WV)	2 years ago	m 1 year	Producer	Active	
	KENTUCKY (KY)	2 years ago	tr 1 year	Agent	Active	
	OHIO (OH)	2 years ago	in 7 months	MAJOR LINES	Active	
	GEORGIA (GA).	2 years ago	in 7 mantra	Agent-Resident	Active	
	GEORGIA (GA)	2 years ago	n 7 mantra	Agent- Norwesidem	Actus	

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

Example below shows the Certifications.

Slandard ~						
Education Type:	Gr	eduation Date:				
	-16		R			DR Inne Adaption
			+ (4)			
Education (9)						ir 21 @
Property Clinical State	And Law County Theres	Electron Take	Education Datest	Dermitation (San Bas	Carthronas Gel New	Shadoorbers Date
	CERNG	Candiounce Medicare Product Candioation	Paused	54p 19, 2022	Dec 32, 2023	5ep 19, 2022
	FFM Centificate	FFM Certificate	Passed	Nov 1, 2012	Out 31, 2023	Aug 22, 2022
	ARP Certificate	AHP Detficate	Passed	Aug 4, 2023	Dec 83, 2523	Aug 4, 2022
	RPM Certificate	FFM Centricate	Patavid	Jun 1, 2022	Out 30, 2028	Asg 31, 2031
	PTM Certificate	FFM CettRicate	Pieted	Apr 15, 2121	Bet 31, 2021	Apr 14, 2021

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

Example shows highlighted line to be viewed.

Education (5)						17 111 (B)	8
Project O	anathana (Ppility Narte-	Education Nam	Advantory Status	Certification Revi Date	Carthouse Reliber	Gatherine Parts	
	CERNS	Carellource Medicare Product Certification	Feind	3ep 33, 2022	Dec 31, 2023	Sep 19, 2022	
	FPM Centrum	PPM Cettfoate	Faced	Here L 2022	Oct 31, 3523	Avg 25, 2112	
	ANP CutReam	AHD Cartilizate	Passed	Fing 4, 2022	Dec 31, 2023	Aug 4, 2022	
	77M Certificate	PPM Certificate	Passed	Jan 1, 2022	Oct 11, 2022	Aug 31, 2021	
	PPM Centificate	FPM Certificate	Parent	Apr 15, 2021	Ges 31, 2023	Apr 14, 2021	



The example below shows the specific FFM Certification detail.

= Ed	lucation Detail for						
Ed	lucation - MKT	PLC - FFM Certificate					
- 5	Suration ID:		instruction / Facility Name PFM Cartificate		Education Status Passed		
				11112			
De	tail Information			(-)(#)			
	Education (C)	WRITELE	Institution / Facility Name	IFM Certificate	Enumerier Type	FFV Certificate	
	Execution Status	Parred	Product Gode:	30	Dertification Start Date	Mov 1, 2022	
	Certification End Dates	Oer 8L 2023	Graduation Date:	Aug 22, 2022	Linense Type	-	
	Giberne Class:	*	Literae State	3 ()	CEU Coadini	-	
	CEU Credit Experiation:	-	Correction	Observed from AB_Begistration_Completion_Lost from data.healthcare.gov/ on 8/24/2022			
1	Education Refere	nce Fields					
	Sore		License Natibe:	-	Company Code:	-	
	CMS Care Transing	e	Product § Tailong				
Fib	es						
File	5						
100	here		Dana (Initiation)	The line of the Serve			

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.

Compliance						
Andreas and Equility Transmos	Amount Forma Linese	t.	Atter	I froming Aspen	nun b i	(decame
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	000934-041	Zymentage	a 7 rate	Agent	Actua	

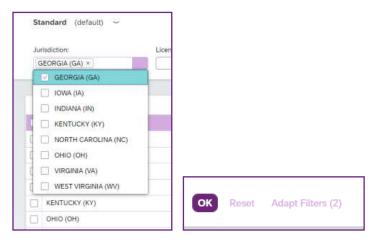
By clicking on the Producer Licenses Card, the system will allow you to view all licenses.

Example below shows the complete list and license detail.

Producer Diceme Selerch No							
Tordari (mini) -							
Arabitos	Literau (D)	Linemen Tame	fettud more Date	Serviceation: Detail	Lowne Terrer		
		0			B Adve 4	- 00	
			(*) (d.)				
Producer Lineares (7)						+	2.11.1
- Andrew	Address III.	1000 Barry		Distances in succession	Second Second	Spanish blans	
C - SACAKER (DA)		April Resident		Dist 28, 2021	8.6 TL TUY	20.00	
C BESPIER (SA)		April farmation		Que 101, 21222	Aug 21, 3913	804	
T HEREADE		RELIDENT FRODUC	ER-INDIVERIAL	Apr 10, 2021	Ac 11, 2011	3154	
		Polacy-Schellar		Apr 14, 2003	R& 11.003	Atta	
apiri,oo mi		Apre.		. in 28.000	Arg 31, 2924	8.0.0	
C 2000 (200		MAJOR LINES.		Apr 9. 2022	Ag.21.303	Alte	
WEST VRIZINA-IWA		Thursday Protocol		max 15, 2523	Ag 11.1114	Atte	

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.

Artelative	Same O	Literne Tiper	United Insue Date:	Territation Date:		Liense Statue					
GEORGAA (GA) =	-	- Ø) [-		(B)	Active +		63	1000	10000	-
Producer Lineares (D)								+		e 10	
Postare Lineare (D	approx 2	ingeneral Tage	-	1 April Date Tak	17	Remains for	-			e. 91	•
	Disease Th Mathematica	ingen fige	-	- Anna Taon Tao Ger (A. 2011	1	Aug JL 202				e .H	•

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

Example below shows the first of two Georgia license detail.

and s	Source:					
	 Producer License Detail for 					
5	License - Agent-Resident - GEORGIA					-
	Itemes Name Agent Factor	Linesed (S)		(all Number)		
	Data Data	System Status Actors				
			(a) (a)			
	Detail information					
	Alara D	Grane Bare	Agent Baciliant	Linter Salat	80.00	
	Train: GEORGE	Liness "gos	April Rectard	Shellor Dete	Ort 28, 3513	
	Every Date: Aug 21, 2020	Date bicent	No.28, 2121	Warn Produktion	390	
	Gen Reported	Linema Resourt Carlo		Nate Demonst Detaart Date	×	
	Competition -					
	Notes					
	Notes					
	Server (see)	Term Stee		Annual State		
		The state	a laund. Yo eddering the film settings			
	My Tasks					
	My Tasks					
	Tax Tax Tax Sec.	Tame Said 1	A Tana . Anna		The Posts	- Enter

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.

Producer Literse Detail h	UF				
License - Agent-F	Resident - GEORGIA		12		
Notes					
Notes					
Description (1)		State Serie			
			No size from Try attempt	One Use settings.	
My Tasks					
My Tasks					
Sect. 10.	That form	Space-Adda	and bear	Press (Charles Charles of
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and .		Tarra - Parm			
			This state Pacent: Thy artiseting	To file settings.	

QUICK LINKS

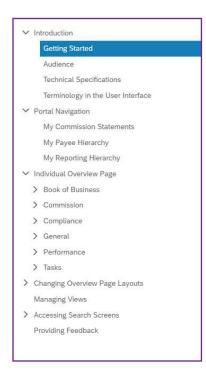
The Quick Links Card will provide links to useful documentation.

To access your Quick Links:

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

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	Extended	_		
	and the	and the second se	Constant and Constant	
	Inter Contex for Agents	3	0 In strange	
	l.			
	and Martin Salaha	Standard - Standards - Stat	And	
	10 jaarn sgr	011	Seer nation	
	No. Adverse			
	Same Spin (Same Sec)			
	Arres .			
	Mating			

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.

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Denied		
and the	My Lawrence	and the second
tae Dool to Agenta	3	0 In all heres
Designation	10 1000	Berting (fax Information)
ten Mi bakten I	the laster - the laster - find	The same the section of the section
Stavenier - 1	De l'	Senst microry
-		
Name Space (Same Section 1)	19	
Array		
inter a		
Malang		

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

 Later Holey Search for 				
Standard -				
Letter III	Interlaneouthi			
	<i>a</i>)	#) (=(#)		C
		- 12		
Autor Macary (1)	1			2 11 0
Letter Malaco (1) Later II	ha ting			
			and the second se	
(and it			C. Stationers, J.	

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.

Des. 13.527
Hole
Posker
Lenne *
£7
By no here spelled der Erenn indirateit, within der lan 24 kann- ynn my thresperiel din nation.
Dor results and care your from Lonnor assister Land affect register on 2011 2022. Phone control your care Department of Nonance in marke do servenous systems. Le register literate will result as a loss of your approximate and adding to marke to of Paul-baser products.
By an balance that additionation for the accessing planet content your Yane Degrations of Incommune Up on have detaily interaction to again the limits additional, you may disregard this action
Tabata yan. Tabata (Ayastana
Condisinte
Dayne Mediagener Office 23 Set Man Imme Dayne, Dayne Henric Constraints and Co
The scales is used for informal must sub. Please do not reply to this result address.

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.

Care	Saurce	
<i>B</i> ₁	Indivitual Overview	
	General	
4	Guick Links My Letters	File Allachments
*:	User Guide for Agents	0
ā	As at lease	As at maky
0	Demographics	Barting / Excinternation air 1
at :	Here My Gain of Delty Anton Party Render Deal	The Design Proc Design and Proceeding State States and Proceeding
۰	62 years ago OH /	Event land sint
6		
	My Addresses	
	Autom Space Autom (Sec) Chr	
	Suiten	
	Plane	
	Naing	

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.

Cares	ivarre			
ħ.	 Demographics Detail for 			
# ¹¹	Demographics -			63
ŧ	Problem (D)		Name	
<u>.</u>				
6	Detail Information			
5	Narrai	38%	Den of Strin Aug 28, 2	342
e.	Phone Number	trat		

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.

Car	Source	
34	Individual Overview	
	General	
	Guick Links My Letters	File Atlantineeds
*	Other Guide for Agents 3	0
a	An attanta	As at makey
0	Ommigraphics	Barring / Eas information
æ	Sera STI Gas of Det State Contract Over Series Series	Par Delly Par Tarley Par Tarley All Parents D. 120 (2011) United States
0	S2 years ago OH /	CaverExed sard
6	My Addresses	
	Anna (pr. Anna (M.) Ch.	
	Saites	
	Pare Velag	

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

Click into each address to view and Edit if needed.

Cure	Source				
а.	Address Detail fo				-
=	Address - Business				
*	Automis Typen Bustness			Fuit Name	lesson of
			- (d)		
	Detail Information				
•					
at .	- Mailing Address				
	Address Type: Business	564	-	Fell Name	
e.	Feet Name	Middle Name		Last Verse	
	Name Saffici -	Atlentas Dr.	-	Antony Line 1.	
	Antoniu Lese 21	Address Line 3:		Address Line A	
	Autom Los 3: -	Chp		Base (
	Zgs / Postal Cone	Coverty	USA		
	- Contact Information				
	Contact Name	Office Phone		Fac -	
	Unitia -	Contact Struk	10000		
	- Alternate Contact				
	Resistant Name: -	Abernate Contact Phone:	-	Australit Ernell -	
	States and Balances				

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.

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nete	aud Doctores			
	General			
	Ganat Linna	Wy Lattern	The Allocations	
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	El yeste agr	DH)	Constitued and	
	(my failures	199		
	Armini Ign Administrati			
	Butterst			
	Manug			

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 & Revolution							
	- dimensioner -						
	Totolog Community						
	Plana & Services Cerminete	6.					
	Marianny Natanala Canadam						
	Feat My Press potential Cenemary	00					
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Producer Calde Ornerstoed Name Consul-Nam ProducerGade pat	 Emostiment Perioda Dennis Lan 2022 Medicen Englinent Petal		T Beenvalton Broken Service Department	•••	Tage 8	-Const Sar	

Examples:

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

etting started sealing CareSource products eason? Here you'll find the training you ne	I ust need a refresher on how to use our tr ad to get you up to speed.	sols? Preparing for an upcoming enrollme
	0	\square
	\bigcirc	
Marketplace Enrollment	Marketplace Online	Marketplace Revenue
Portal Training Video	Enrollment FAQ	Cycle Operations Guide
Learn how to enroll new members through the CareSource Ervolment Portal, powered by HealthShorpa.	Find answers to trequently asked questions about the HealthShirps powered Emotment Portal.	Revelow this overview for the Marketplace enrollee and member payment process, involces and grace periods.



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.

MARKETIN	g Ma	TERIALS	3				
	Select a State						
1					der .		
G	eorgia	Indiana	Kentucky	Ohio	West Virginia		
North	Carolina						
Tools & Resources	MAF	KETING MA	TERIALS				
NEWSLETTERS	not just tax	alunit your Pritzbourca logi	n pinna nextext our Broker S		n, It yns hww ortsoardiad bal haw me nas the Printfesanta Quick		
MARKETING MATERIALS	Petiture	a Golder for motivations on:	fow to order manifest				
GUECK LEWIS here's to bese	_	r Compensation	Disclosure Form				



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

Tools & Resources	FIND MY PRESCRIPTIONS
QUICK START GUIDE	
QUICK START STEPS FOR NEW MEMBERS	Select a Plan Select your plan below to view more information!
FIND A DOCTOR	Dual Special Needs (Medicare + Medicaid)
WHERE TO GET CARE	Medicare Advantage (OH)
FIND MY PRESCRIPTIONS -	Medicaid
Find A Pharmacy	Marketplace
Medication Therapy Management	MyCare (OH) (Medicare + Medicaid)
RENEW YOUR BENEFITS	Planning for Healthy Babies (GA)
FILE A GRIEVANCE OR APPEAL +	CareSource PASSE (AR)
CAREGIVER RESOURCES +	
FORMS	

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





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.

Producer Removem					1
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	100010				
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	Managlass Self Service Environment Portal	Martine Service Phere Martines	CONTRACT		
		Today Straining Materials			
		History Polici Celticator Traning			

Example below shows the Contents of the attached Producer Guide.

ABOUT CARESOURCE	
CONTRACTING	
LICENSING AND APPOINTMENT	i
CERTIFICATION	
CARESOURCE CODE OF CONDUCT	
PENDED (WITHHELD) COMMISSIONS	
CHARGEBACK DEBT RECOVERY	
CHANGING PRODUCER OF RECORD	1
TRANSFERRING FMO	1
COMPLIANCE	1
AGENT, BROKER AND WEB BROKER EXPECTATIONS	1
SALES & MARKETING GRIEVANCE PROCESS	1
FRAUD, WASTE AND ABUSE (FWA)	
HIPAA PRIVACY PRACTICES	2
NON-DISCRIMINATION NOTICE	2
MARKETING MATERIALS	2
PRODUCER SERVICE DEPARTMENT	2
PRODUCER PORTAL GUIDE	



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.

Hoduper Resources								
Tools & Resources						141		
		Lang/124						
		Training (Caresson)	2]	
		Plans & Sentons Carenna	rte -					
		Marketry Materials Careto	urue .				1	
		Paul My Postarghama [Caren	unte .					
		Find My Postarphana Cares Find a Doctor Garessarp						
	7							
Producer Guide Download	Lais.			Producer Resource Access	-	Legal Disclar	inera	د مد
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teres Corner Ison	100	Fred a Doctor Canessan		and a second	- 444	Logal &	Cornel face	
Producer Guilde Download News. Cornet Type ProduceGuide pdf	-	Fred & Docker Caressan Enrollement Portfalls 2023 Medicare Enrollment Portfal Narketplace Bart Service Enrollment Portfal		Transa (in		there :		
teres Corner Ison	-	Fred & Docker Consessor Encodement Pointails Bearing Join 2023 Mechanis Encodement Pointai		Primer, Inc. Bricker Salvice Digartment	-	Logal &	Cornel face	

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.

areSource			
	Sign up for a free	EMAL	
	agent account		
	Process enrolments and renewsils, manage leads and strengthen your overall buschess with the power of HealthSherpa's Agent Tools behind you.	PASSWORD	Show
		By signing up, you attest t Tarms of Sarvice, and cond from HealthSherps.	hat you agree with dur



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.

Toola & Recourses								
		Transa pre-						
		Todring Caresource						
		Plans & Sentrars (Cerears	erra .					
		Marketing Materials General	NUTRE					
		Finit My Pressentitions Care						
		Find a Ductor (Canonar						
Producer Guide Download	141			Producer Resiliance Aldese		Lagat Discla	Innersi	
Producer Guide Download	Lat) Success	Find a Ductor (Campus		Produter Residence Access		Logal Divisio	hars: 'Conintfair	Bannal
		Fing a Ductor (Earness Enrollment Pertain			- 10	Legel 5		tion of
	(desired)	Red a Dottor (Canada Envellment Portale Name in		Patrol Line 1	-	have	Consid from	
Name Control Type	(desired)	Fiel a Doctor (Cananae Enrollment Protein Marriel Dir. 2013 Madrane Enrolment Fortei		Ferrent Line . Hower Service Department	-	Legel 5	Consid from	Sec. 1

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

Example below shows the Brokers Service Department link.

ISI WA	VT TO SELL CARESOL	RCE? SELEC	T YOUR GEN	IERAL AGENC	// LDA	PN MORE	
Producers Overview	BROKER	SERVIC	DE DEPA	ARTMENT	7		
QUICK LINKS Apply To Became A Broker Marketing Materials Producers Training Materials			J.	Select a State		-	
		Georgia	Indiana	Kentucky	Ohio	West Virginia	
	CareSource has a d lifecycle.	dicated Broker S	ervices departme	nt to support our cor	tracted individu	al producers throughout the	agent
	with a constraint of the		contracting proc	ass and verify creder	itialis in order to	submit a state appointment	and mak
	We also manage the	payment of com	missions and inve	sticate situations of r	en-parment.		



Example below shows the Member Services Phone Numbers link.

Contrast / Monoclasses / 5	intent in	
		Member Services Phone Numbers
Member Overview		If you are having traution finding the internation you are incoming for on our well-alse or how more quantizers, passes out as: . On Member (barvious shall will be nappy to prevent your quantizers.
TOOLS & RESOURCES		оню
		Modicate: 1-000-488-0104 (TTY: 1-000-700-0x Y11)
DOWINGT US		Houses 7 ann. In 7 guns, Monday - Filday
		Medicare Advantage: 1 644 607 2827 (779) 1-800 750 0760 or 711)
QUEKLINKS	P	House 8 a.m. to 8 p.m. EST, seven days a www.from Citober 1 to Macro D1, and Monday - Fistay the rest of the year
My Devidoore Linue	~	MA - Dual Special Reeds: 1-653-200 (828) (111/: 1-800-750-0750 or 711)
		Haum: Risons In Rights, RST, seven days a week from Dickober 1 to Membra 31, and Mendae Innough Peday the mediat the year
		Marketplace: 1-800-678-8208 (779: 1-800-718)-0719 or 711)
		Hazes 7 am to 7 pm, Manby - Balay
		MyCare: 1.055-475-3163 (TTv: 1.400-750-0750-0750-0711)
		Hours: B am. In 8 p.m., Monday - Feloy
		Community Transition Programs (CTP): 1-844-529-1128 (TTY: 1-800-790-0750 or 711)
		Heixins: III a.m. to 6 p.m., Monday - Filday
		KENTUCKY
		Marketplace: 1-888-875-6448 (77Y: 1-800-648-6056 or 111)
		Hours: 7 a.m. Is: 7 p.m., Manday - Filday

Example below shows the Order Marketing Materials link.

ign In	
User Id	
Password	
	_
For password resets, email cs.pwreset@baesman.com	
cs.pwreart@baesman.com You must be an actively contracte	
cs.pwreart@baesman.com	i în arda

Example below shows the Medicare Product Certification Training link.

· · · · · · · · · · · · · · · · · · ·	
Pleases enter your unername & password to access your ordine	
kaning.	Show Password
	C Remember me on this computer
	Login
1257	Eve largotten my unemame/presword



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.

Yoducer Resources							
Tanta & Herandrows					tores.		
		- Announcement					
		Training Carasmuto					
		Plans & Settinov Cerem	nets.				
		Wathstraj Materiale) Care	NULLER .				
		First My Possistyphane Car					
		Find A Doctor Centres					
					-		
Producer Guide Doverland	141			Producer Financian Access	 Legal Disclai	J.	
	Lat I Second	Find a Oostar Censor		Producer Resource Access	 Legel Dische Nach	Conserts	ine ent
one comethie	(Dermine)	Ford & Oattor Common			 Terrie Legel &		(invest)
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Legal Disclaimers				
Name	Content Type	Download		
Legal & Compliance	нтм	(± ~)		

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

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