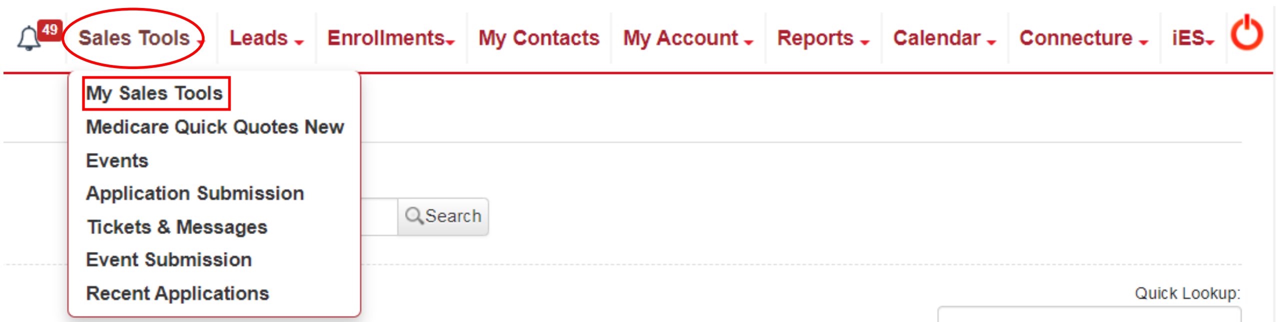
AGA Agent Portal Guide

The agent portal contains a wide range of documentation and information regarding AGA's products and programs, as well as various training audios, videos, and PDFs. You will be able to review your book of business and commission statements, verify contracting and certification status, view your sales tools, access your secure tickets and messages, submit applications and track enrollment, and view plan quotes. You can also access your Connecture online enrollment tool (see Connecture training) for further detail.

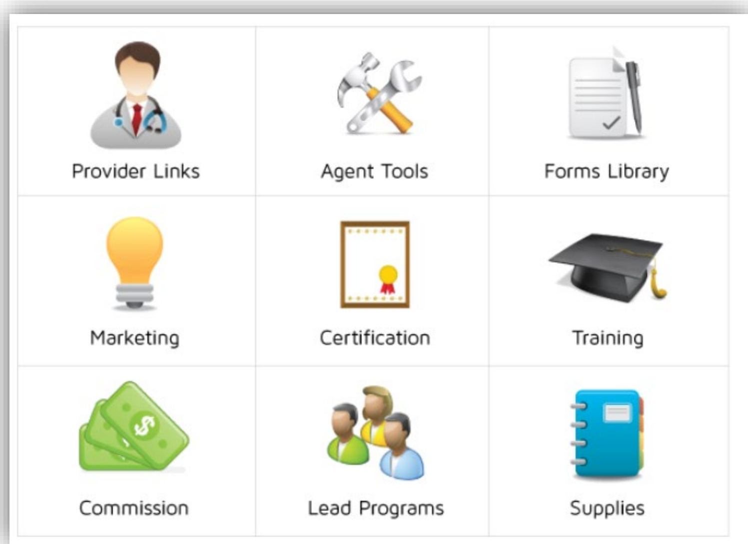
Your Sales Tools

The Sales Tools will provide you with Provider Links; Agent Tools; Forms Library; Certification; Marketing; Lead Programs; Training; Commission; and Supplies.

1. To access your Sales Tools: Select **Sales Tools** from the dropdown and select **My Sales Tools.**



2. Select the icon for the appropriate subject:



Provider Links – Links for doctors and prescription drugs based by carrier.

Agent Tools – Tools to help with the sales process, including sales presentations, compliance information, event tools, Connecture tools, and contracting tools.

Forms Library – a library of downloadable PDFs to assist with sales, events, and AGA programs. The forms include Scope of Appointment, Enrollment Cover Sheet, Event Reporting forms, Direct Deposit form, Co-Op Reimbursement Packet, and Lead Order Form.

Marketing – View a catalogue of available tri-folds, business cards, and Service or Event flyers. The new Generic Materials Job Aid is here to help you get started with compliance and marketing materials.

Certification –Instructions on completing carrier certifications, as well as what is required for each carrier and the links to certify.

Training – How to Presentations are included in this section, as well as the calendar for any AGA or carrier trainings. The training calendar shows you available trainings in your state. Click on your resident state on the map see all trainings.

Commission – Includes Commission Payment Cycles, as well as Commission Payment Grids for MAPD, PDP, and Med Supp plans.

Lead Programs – Lists programs that are available, as well as necessary documents regarding the Lead Program, such as the Lead Program packet agents are required to complete in order to be eligible.

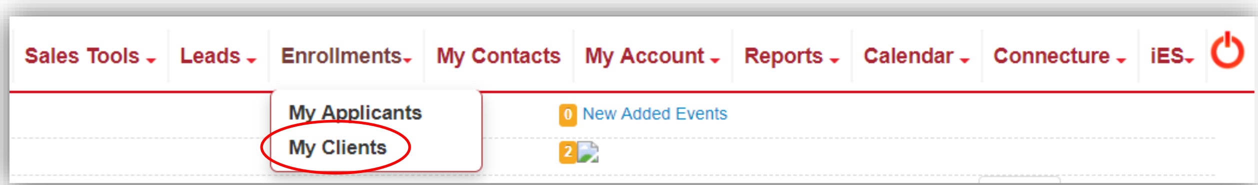
Supplies – Includes Supply Request Form and instructions on how to submit your request.

Viewing Member Information

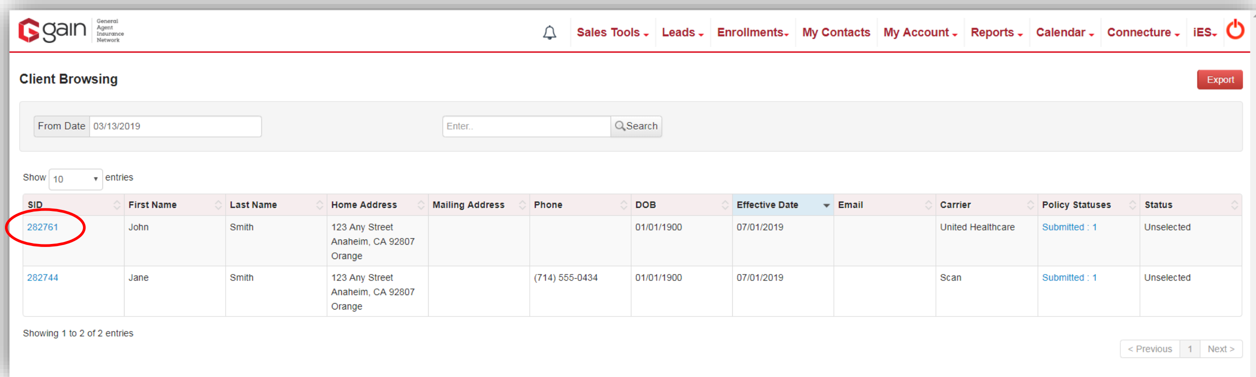
My Clients

The client system is designed to help you view your members more efficiently. This will allow you to update your beneficiary information to ensure accuracy for retention letters, store formulary information for annual benefit reviews, and add any additional member information for future reference. Since the information is not directly associated with an application, you are able to have more control of the member information. Note: this information will not be sent to the carriers on the beneficiaries' behalf. This is for you reference only.

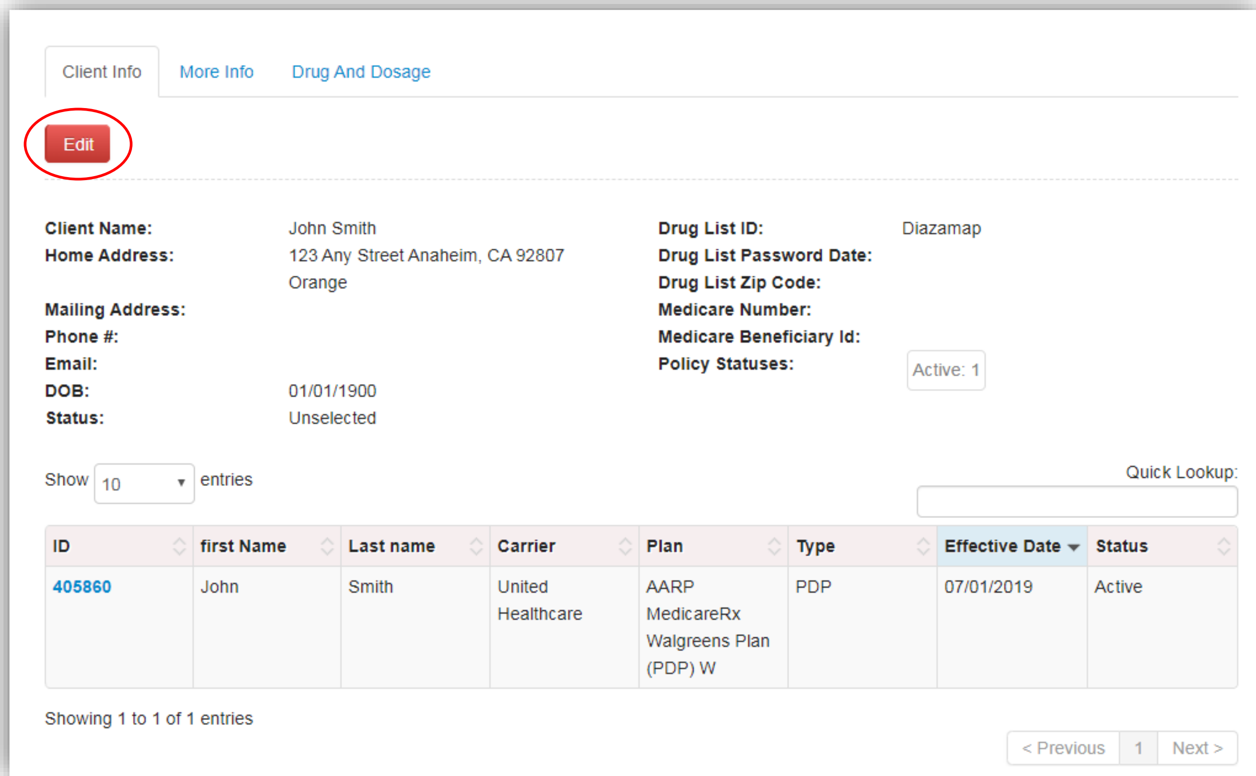
1. On the dashboard of your agent portal, you will see a dropdown for **Enrollments**.
    a. Select **My Clients**

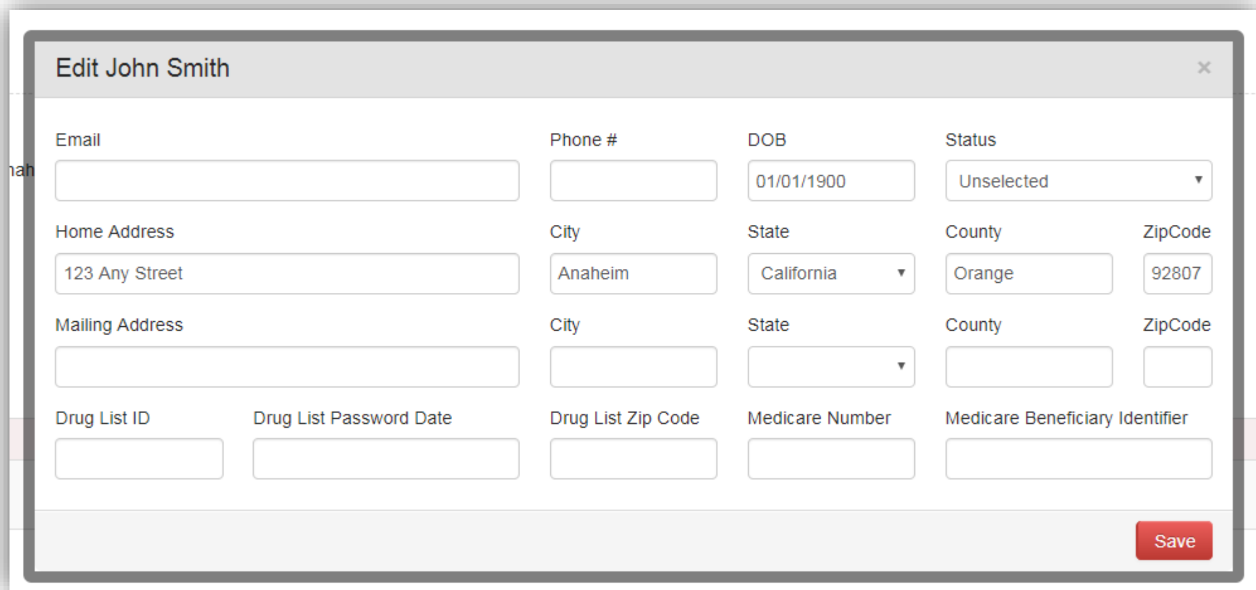


2. Here you will be able view your individual client records.
    a. You can search for the client by name to view the client record.
    b. A full list can be exported to Excel by selecting the **Export** button on the right-hand side.
3. Select the client ID to be navigated to the enrollment history page.
    a. You will be able to see all prior plans and records, if applicable.

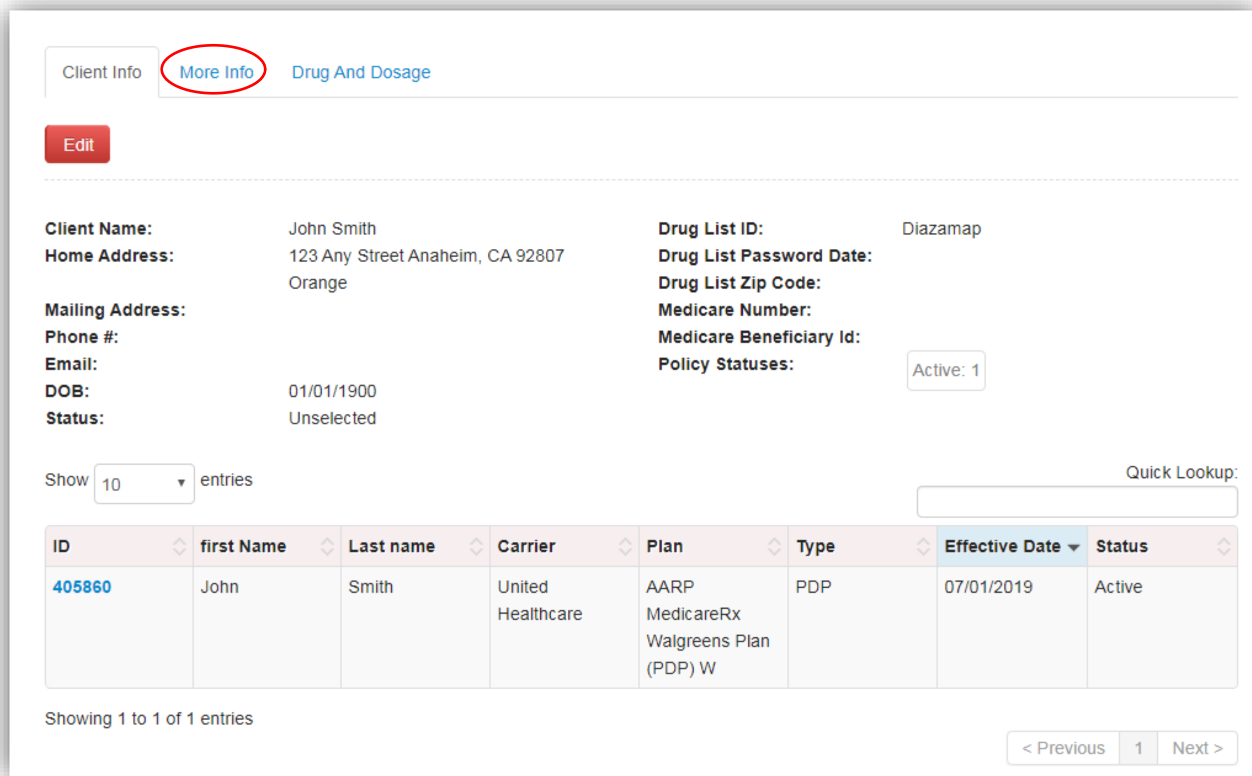


4. Select **EDIT** to update any information on the client page:
    a. **Edit** will allow you change beneficiary information, including Address, Phone Number, Email, save Drug lists, and add Drug IDs, for future reference.

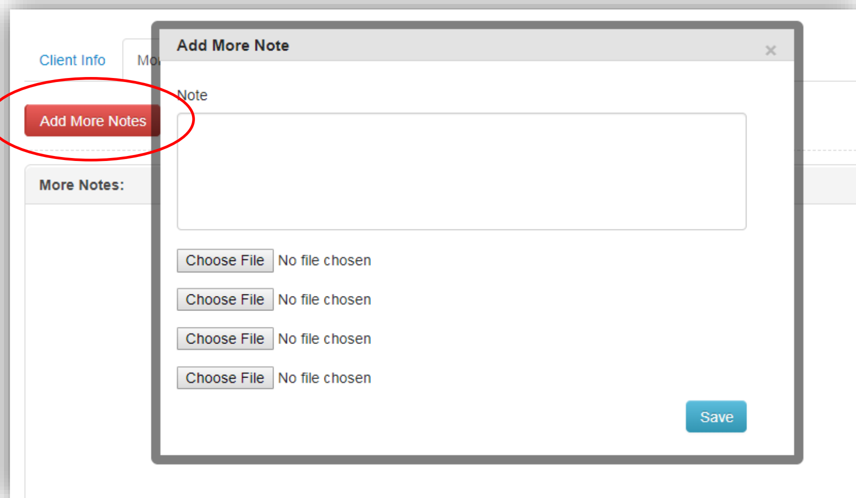




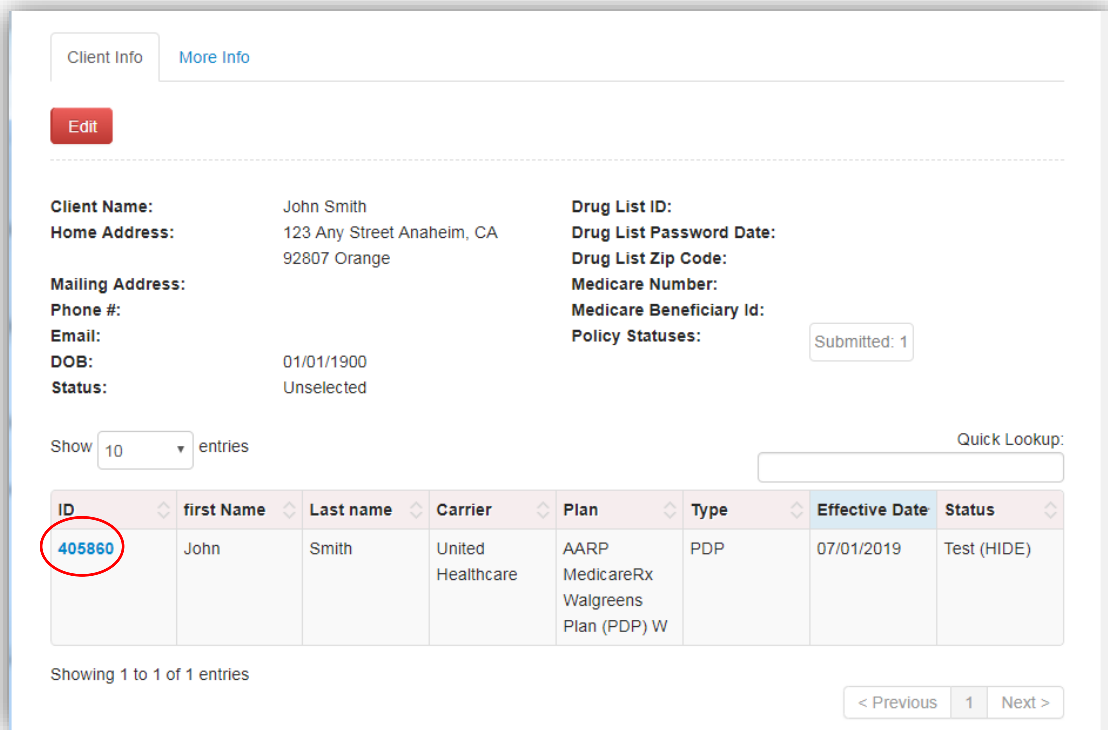
5. **Notes** will allow you to upload any documents associated with the client, as well as save any additional text notes you may need. To add notes or view previously saved notes in the client record, select the **More Info** tab.



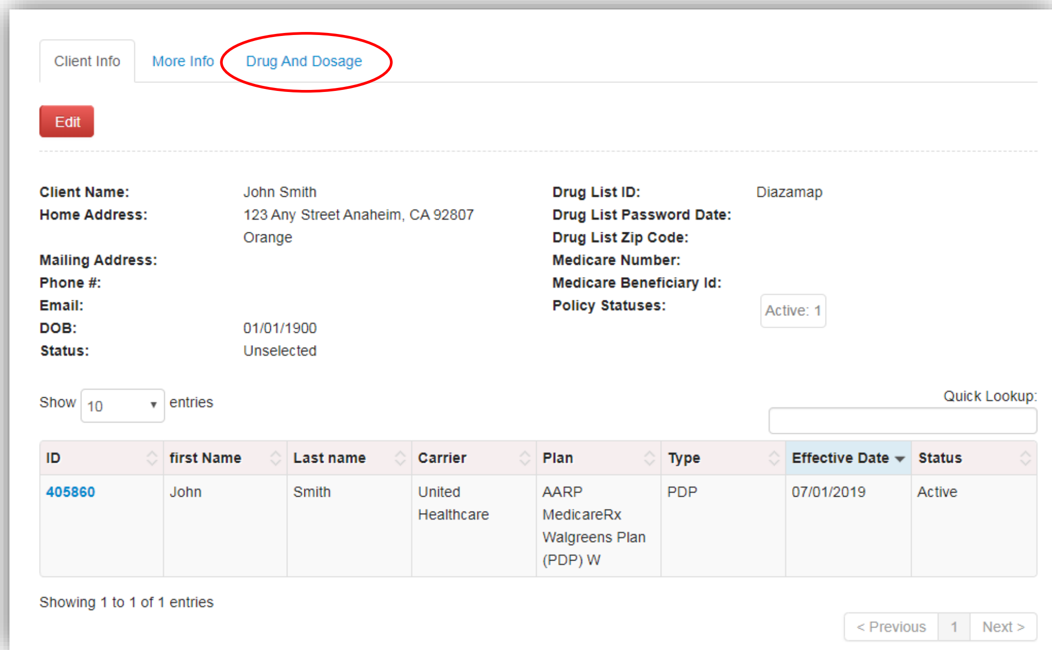
a. Select **Add More Notes** and a new window will appear. You will be able to upload files and save typed notes. Click on **Save** for the note or file to be saved in the client record.



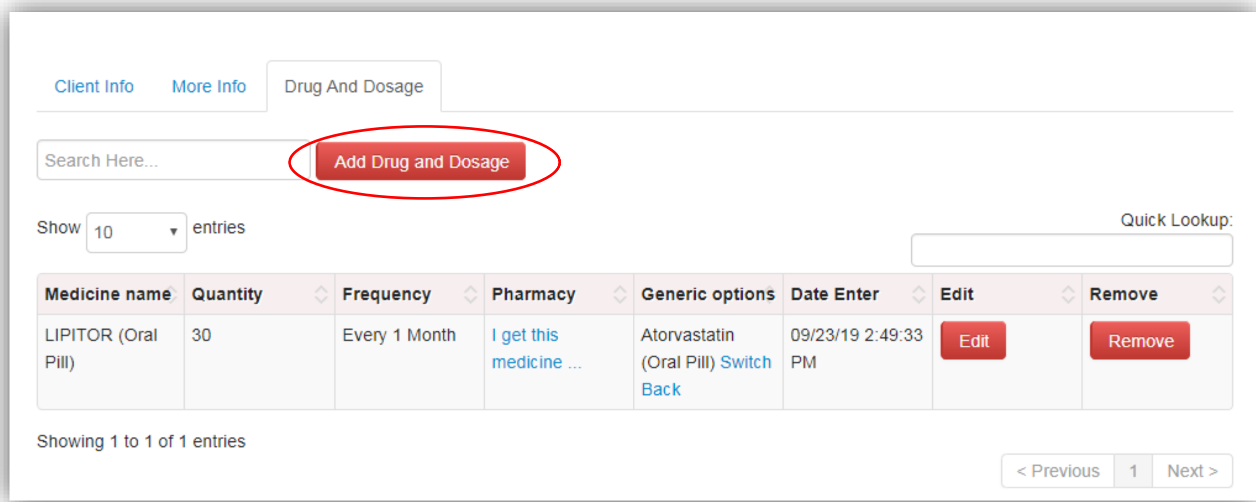
6. The client record will show you all enrollment history for your beneficiary under the Client Info. To see the status of the individual enrollment for a policy, select the application ID below the client information to be navigated to the application page. Note: You can access the application page for a beneficiary in your **My Applicants** page if you are looking for specific enrollment details or notes (see instructions for **My Applicants** below).



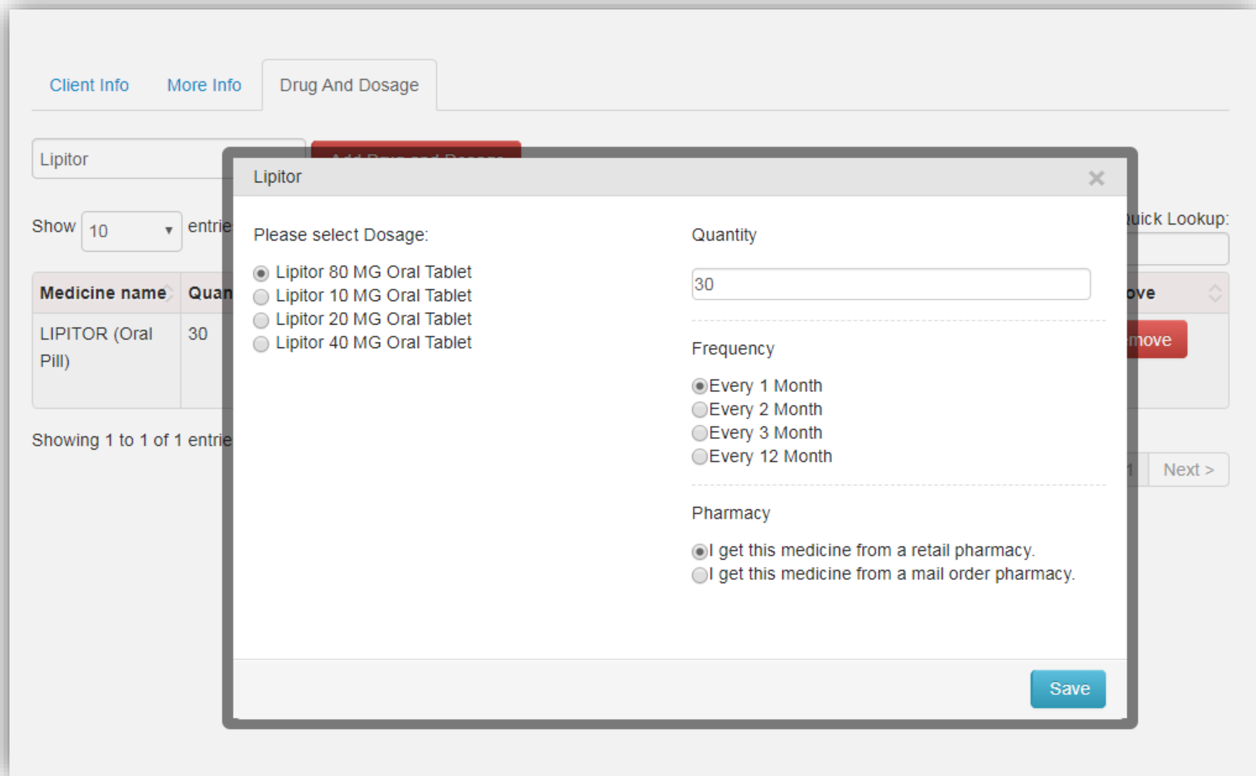
7. To view Client drug information, select the **Drug and Dosage** tab in the client profile.



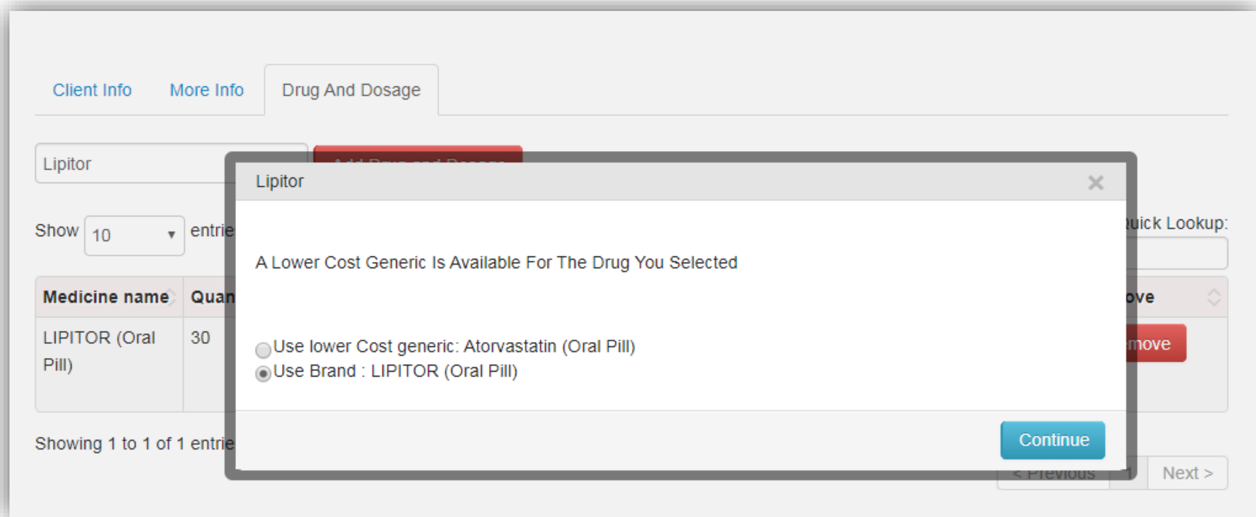
a. To add a new drug, search for the drug name and select **Add Drug and Dosage.**



b. A new window will appear and you will be able to select the dosage, quantity, frequency, and the beneficiary's pharmacy information.



c. Select **Save** to be navigated to the next page which will show the brand name and generic options available.

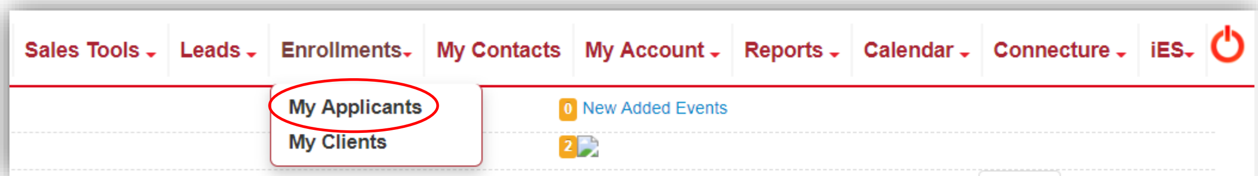


d. To edit or remove a drug from the client record, select **Edit** or **Remove**.
e. There is no limit to information that can be stored.

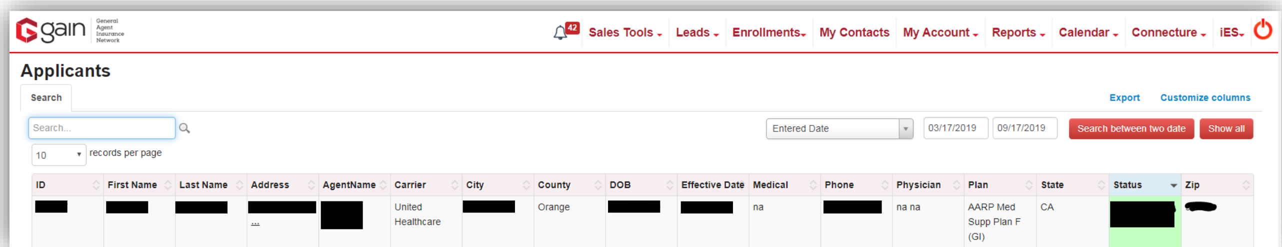
My Applicants

My Applicants will show detailed enrollment information associated with an application. A new Applicant record is created with every new submitted application. You will be able to view the current enrollment information, including carrier, plan name, effective date, enrollment status, medical group, carrier IDs, and PCP information. Information in the Applicant record cannot be updated as it has to match the enrollment application exactly in order for AGA to verify enrollment status with the carrier.

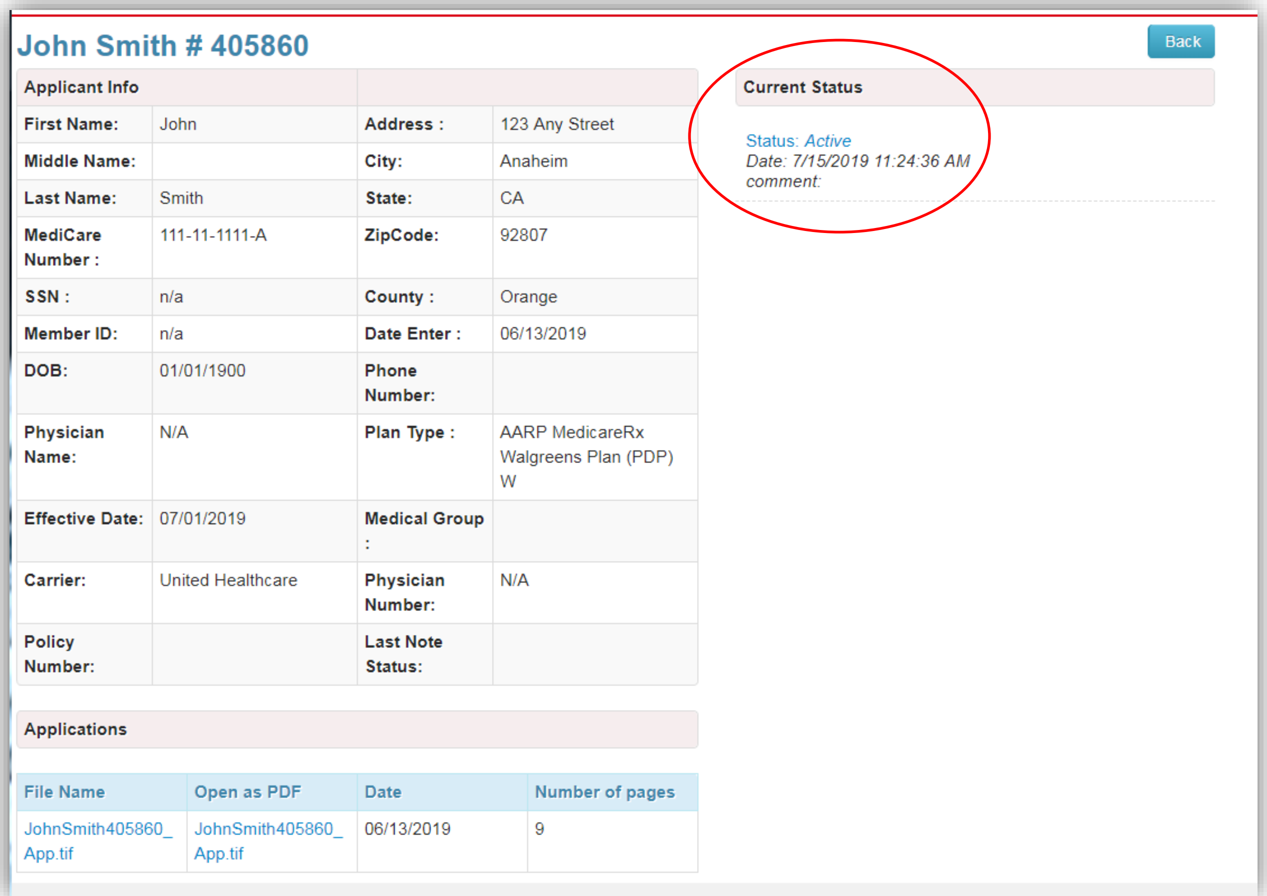
1. On the dashboard of your Agent portal, you will see a dropdown labeled **Enrollments**.
   a. Select **My Applicants**



   b. Applicant records are sorted by submission date with the most recently-submitted application at the top.
      i. You can customize which information you would like to view by selecting **Customize Columns** on the right-hand side.
      ii. You can also export a list of your members with the **Export** button.



   c. Select the ID for the Applicant record to view additional member information, including enrollment status, view a PDF of the application (if a copy has been sent to AGA), and other plan information.



John Smith # 405860

Back

Applicant Info			
First Name:	John	Address :	123 Any Street
Middle Name:		City:	Anaheim
Last Name:	Smith	State:	CA
MediCare Number :	111-11-1111-A	ZipCode:	92807
SSN :	n/a	County :	Orange
Member ID:	n/a	Date Enter :	06/13/2019
DOB:	01/01/1900	Phone Number:	
Physician Name:	N/A	Plan Type :	AARP MedicareRx Walgreens Plan (PDP) W
Effective Date:	07/01/2019	Medical Group :	
Carrier:	United Healthcare	Physician Number:	N/A
Policy Number:		Last Note Status:	

Current Status

Status: *Active*
Date: 7/15/2019 11:24:36 AM
comment:

Applications

File Name	Open as PDF	Date	Number of pages
JohnSmith405860_App.tif	JohnSmith405860_App.tif	06/13/2019	9

i. If the member has disenrolled from the plan, the termination date and termination confirmation will also be available.

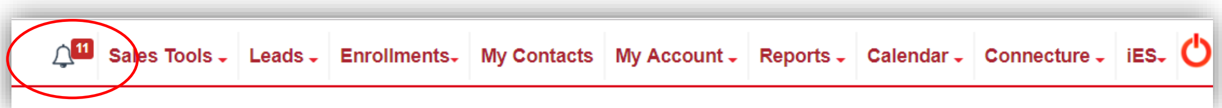
ii. Current enrollment status and any additional commission or enrollment notes are available in **Current Notes.**

Please see status definitions below:

Status	Meaning
Active	Member is active and commission has been paid.
Closed	Record is not active.
Discrepancy	Member is active and commission is due. The record has been sent to the carrier for review and commission reconciliation.
Eligibility	Missing or late payment. Record has been sent to carrier for enrollment confirmation.
Error (HIDE)	Duplicate record created in error.
Submitted	Application has been submitted to carrier, but no commission paid. If payment is missed, status will update to Eligibility. When commission is paid, the status updates to Active.
Termed	Member is no longer active on indicated record.
Uncommissionable	Plan is not commissionable. The result of a withdrawn or denied application; member termed within the Rapid Disenrollment Period; or plan type is not commissionable per carrier schedule.

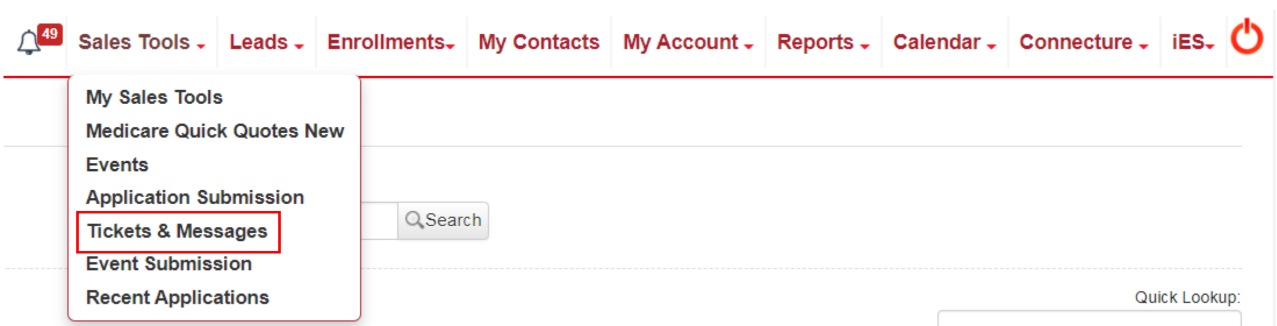
Tickets and Messaging

The Ticket and Messaging System is a new streamlined way to make requests through your AGA Agent portal or AGA Mobile App. You are able to communicate securely through this system for more efficient request response and inquiry reconciliation.

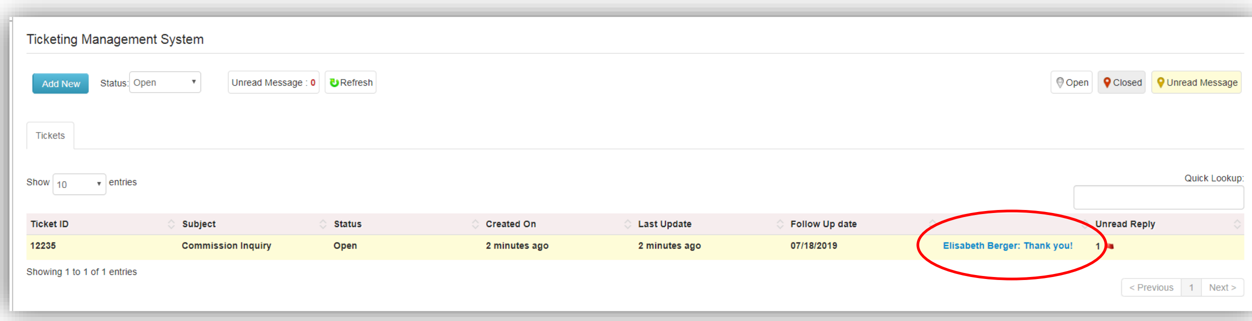


1. Click on a ticket notification and it will navigate you to the most recent update for that ticket
2. You will also receive an Email notification as long as you are subscribed to the AGA emails. If you have the mobile app downloaded, you will also receive an alert on your mobile device.

Viewing Tickets

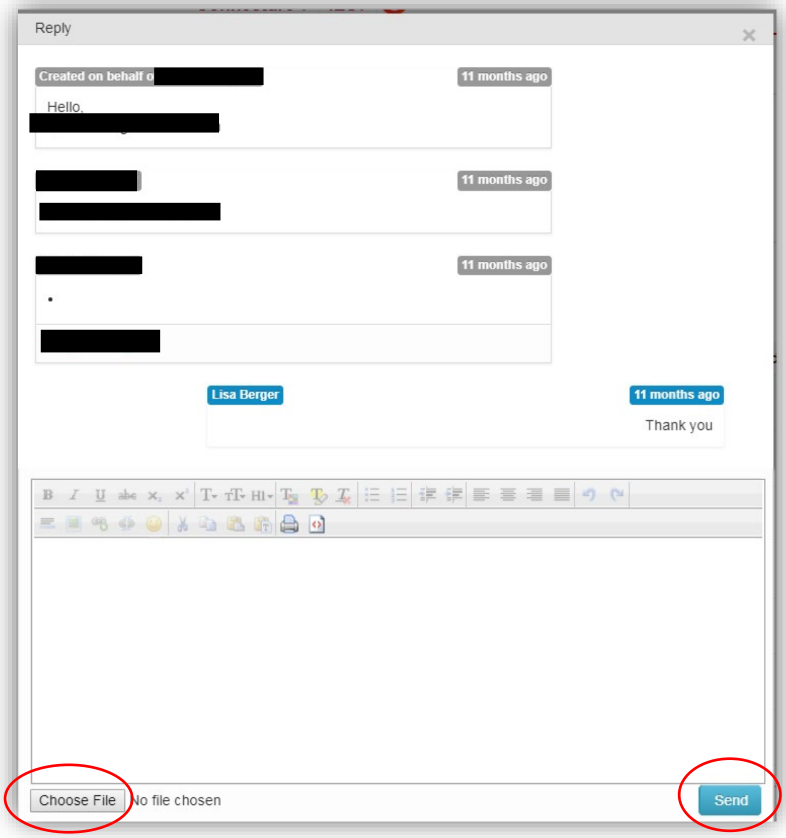


3. Click on **Tickets & Messages** from the left-hand menu on your dashboard if there is no notification present.
4. Any open tickets will be shown by default in the main page view.
5. Unread messages will be highlighted Yellow and a flag will be shown in the **Unread Reply** column for unread messages.



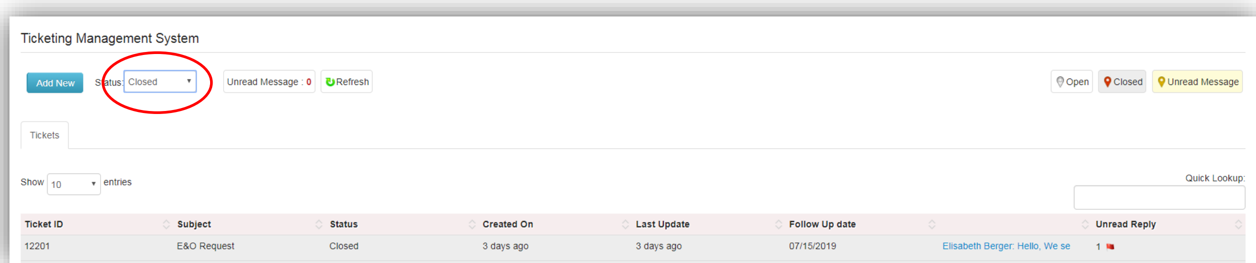
6. To respond to or view tickets, select the blue type and a new window will appear.
   - Select **Send** to update the ticket.
     - Select **Choose File** to upload a document or file to a ticket.
     - You must provide a note for the file to be uploaded to the ticket.

- **Note**: A ticket must be created prior to uploading any files.



Viewing Closed Tickets

1. Select **Closed** from the **Status** dropdown menu on the right-hand side.
   - Select **Refresh** for the page to reload if it does not reset the view.

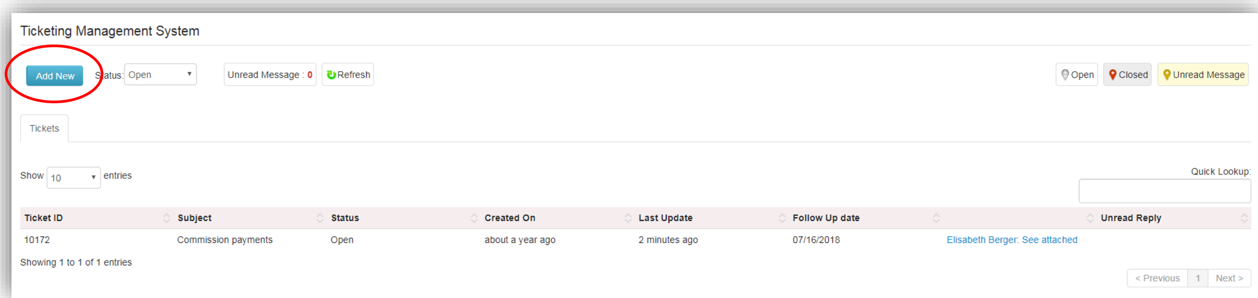


2. Unread messages will be flagged for easy viewing.
   - A ticket will be closed once AGA has completed all actions associated with the request.
3. To view updates to a closed ticket, select the message you would like to view and all updates will be available, even if the ticket is closed. Please create a new ticket if you have additional questions or concerns after a ticket has been closed.

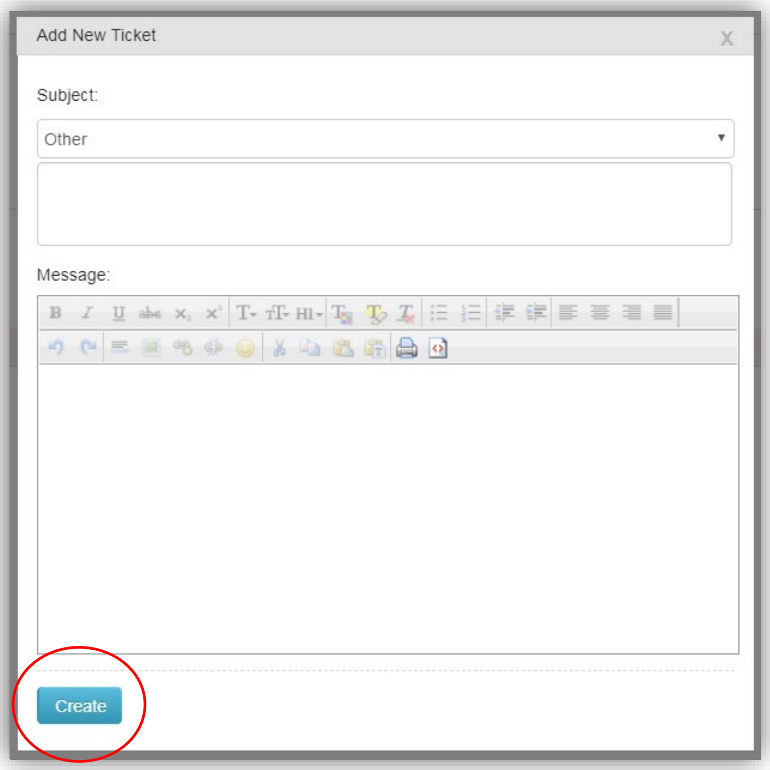
<u>Creating a Ticket</u>

Tickets will be addressed within 24 hours of creation. Please contact the Broker Service Team if you're having any issues with your tickets, mobile app, or AGA Agent portal.

1. Navigate to your **Ticketing Management System** by selecting **Tickets & Messaging** from your **Dashboard** as indicated in the Viewing tickets instructions.
2. Select **Add New** in the upper left-hand corner.



3. Select the appropriate subject for your inquiry.
   a. If you do not see the subject for your inquiry, select **Other** (and provide an appropriate subject in the box provided) and it will be assigned to the correct department by the Broker Service Team.



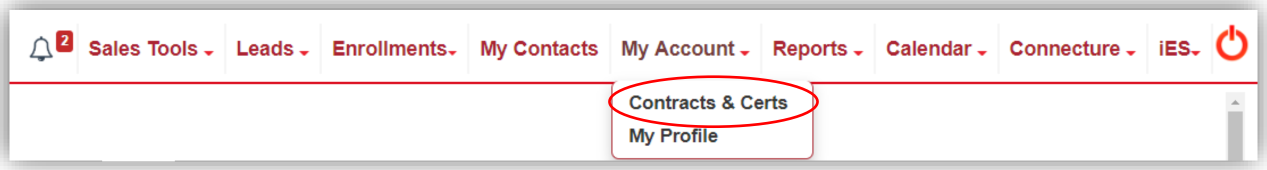
4. Provide a brief, but detailed, description of your inquiry in the **Message** section.

- A note must be provided in order to create a ticket.

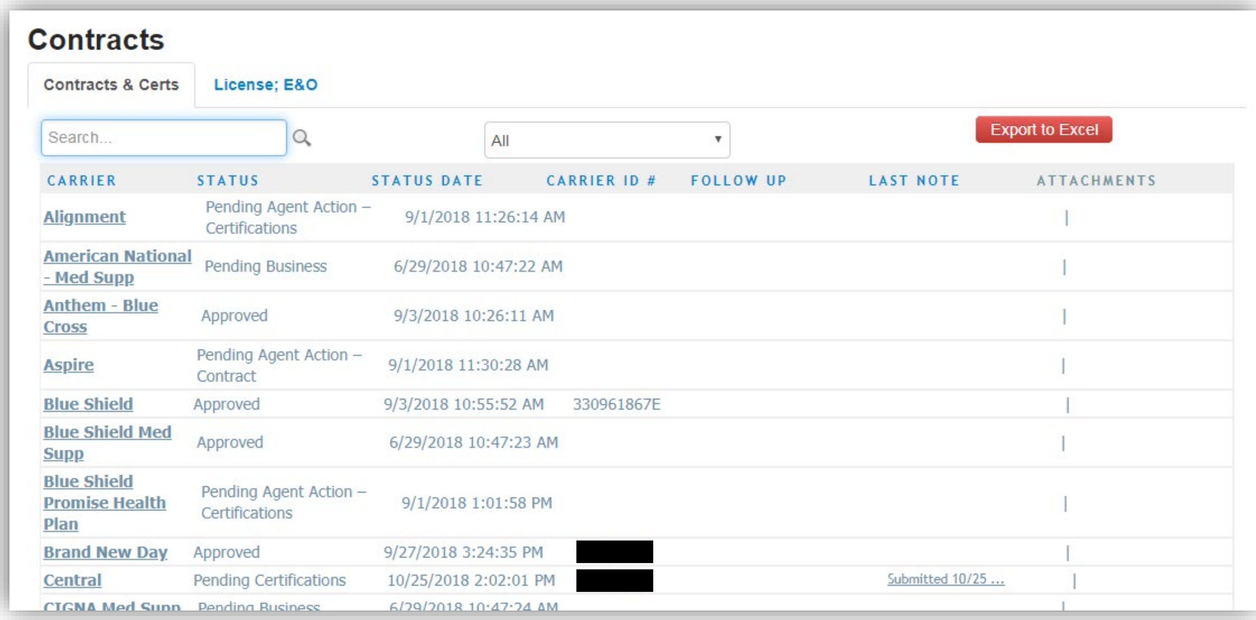
5. Select **Create** and your ticket will be generated and sent to the correct department or the Broker Service department for review and resolution.
6. Once a ticket has been created, you will be able to upload files and provide any additional information necessary.

If you have questions about the status of your tickets, please contact the Broker Service Team for further assistance.

Viewing Your Contracting Status

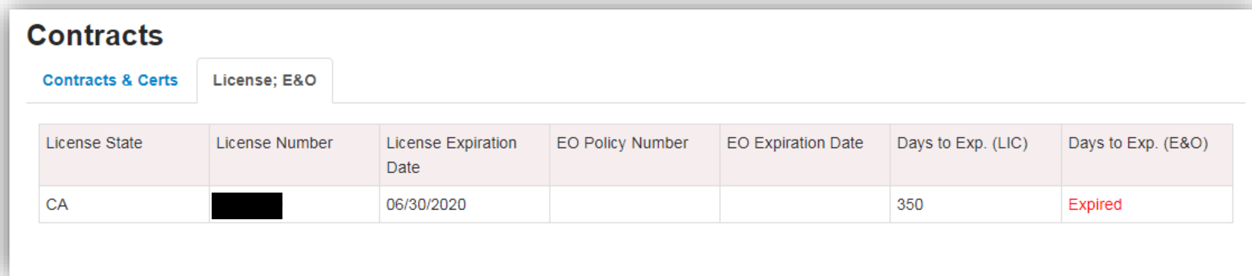


1. Select **My Account**.
2. Select **Contracts & Certs** from the dropdown menu.



CARRIER	STATUS	STATUS DATE	CARRIER ID #	FOLLOW UP	LAST NOTE	ATTACHMENTS
Alignment	Pending Agent Action – Certifications	9/1/2018 11:26:14 AM				
American National - Med Supp	Pending Business	6/29/2018 10:47:22 AM				
Anthem - Blue Cross	Approved	9/3/2018 10:26:11 AM				
Aspire	Pending Agent Action – Contract	9/1/2018 11:30:28 AM				
Blue Shield	Approved	9/3/2018 10:55:52 AM	330961867E			
Blue Shield Med Supp	Approved	6/29/2018 10:47:23 AM				
Blue Shield Promise Health Plan	Pending Agent Action – Certifications	9/1/2018 1:01:58 PM				
Brand New Day	Approved	9/27/2018 3:24:35 PM	[redacted]			
Central	Pending Certifications	10/25/2018 2:02:01 PM	[redacted]		Submitted 10/25 ...	
CIGNA Med Supp	Pending Business	6/29/2018 10:47:24 AM				

3. Agent Contracting status in "**Status**" column.
4. All statuses can be exported to Excel spreadsheet.
5. **License; E&O** tab will show the current status and expiration dates of license and E&O
   a. All licenses and E&Os on file will be listed here.



Contracts

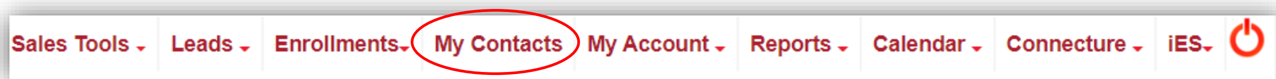
Contracts & Certs | License; E&O

License State	License Number	License Expiration Date	EO Policy Number	EO Expiration Date	Days to Exp. (LIC)	Days to Exp. (E&O)
CA	[redacted]	06/30/2020			350	Expired

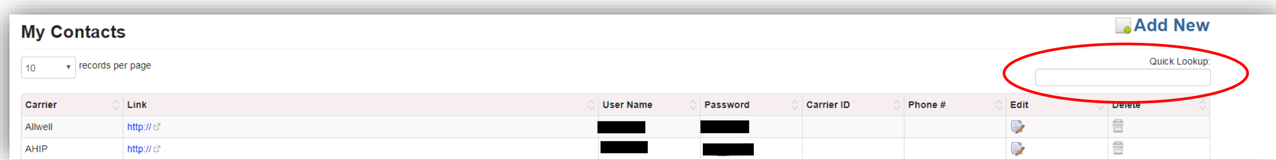
6. All updated documents and credentials can be sent to certs@appliedga.com for processing; or, create a ticket from your Agent portal or mobile application and upload a digital copy of your documents.
   a. Agent portal updated within 3-5 business days of receipt of documents.
7. If you have questions or concerns about the current contracting or license status, please contact your Broker Account Representative.

<u>My Contacts</u>

To assist with keeping track of your carrier portal login credentials, select **My Contacts** from the top menu.



1. All saved logins will be shown, use **Quick Lookup** to filter your records.



My Contacts

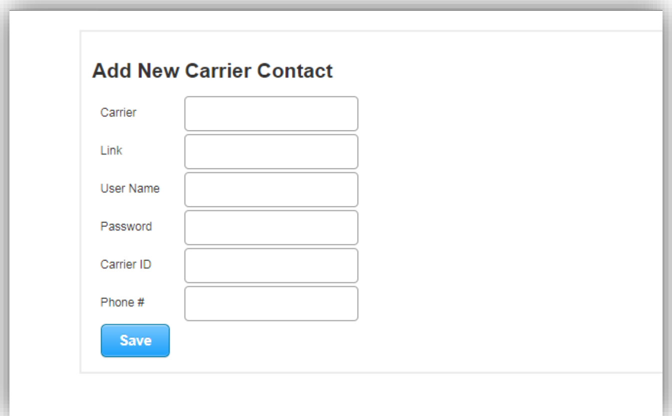
Add New

10 records per page

Quick Lookup:

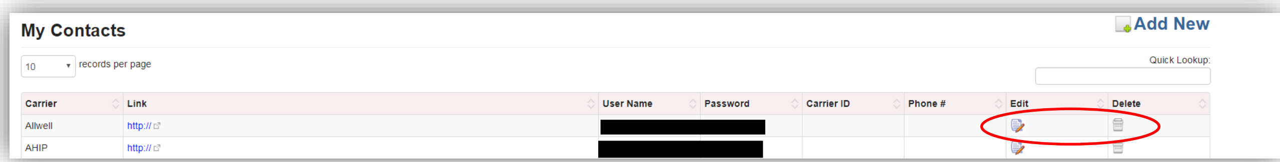
Carrier	Link	User Name	Password	Carrier ID	Phone #	Edit	Delete
Allwell	http://	[redacted]	[redacted]				
AHIP	http://	[redacted]	[redacted]				

2. Select **Add New** to create a new contact record and a new window will appear. Only one field is required to create a contact record.



a. Carrier – Carrier or contact name.
b. Link – website URL.
c. User Name – User name for website login.
d. Password – Password for website login.
e. Carrier ID – Carrier ID (if not used as user name).
f. Phone – phone number for carrier contact or website assistance.

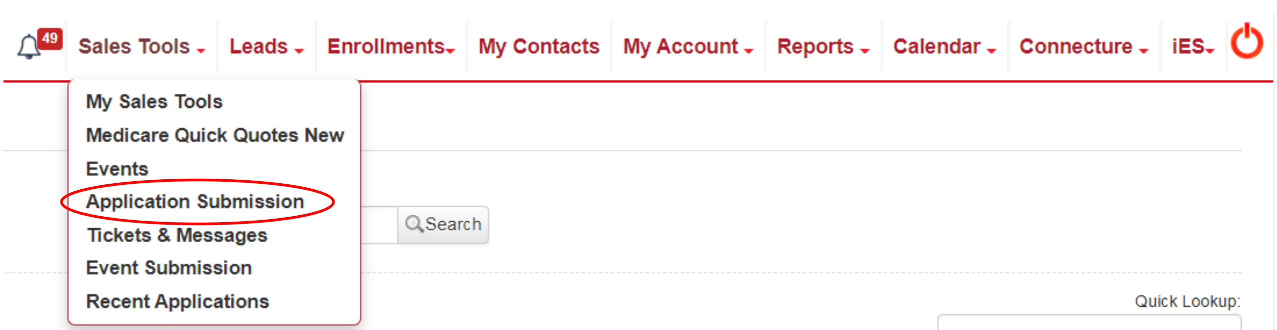
3. Select **Save** for the record to be created.
4. To edit or delete a contact, select the **Delete** or **Edit** icon for the record.



Application Submission and Tracking

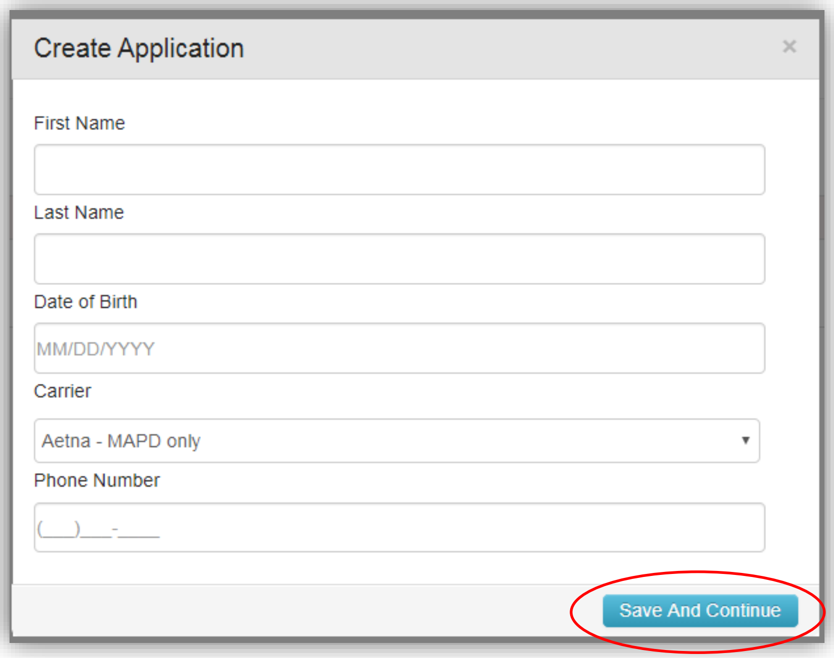
To submit applications through your AGA Agent portal. You will need to have a digital copy of the application (PDF) in order for it to be uploaded.

1. Select **Sales Tools** from the top menu, then **Application Submission**

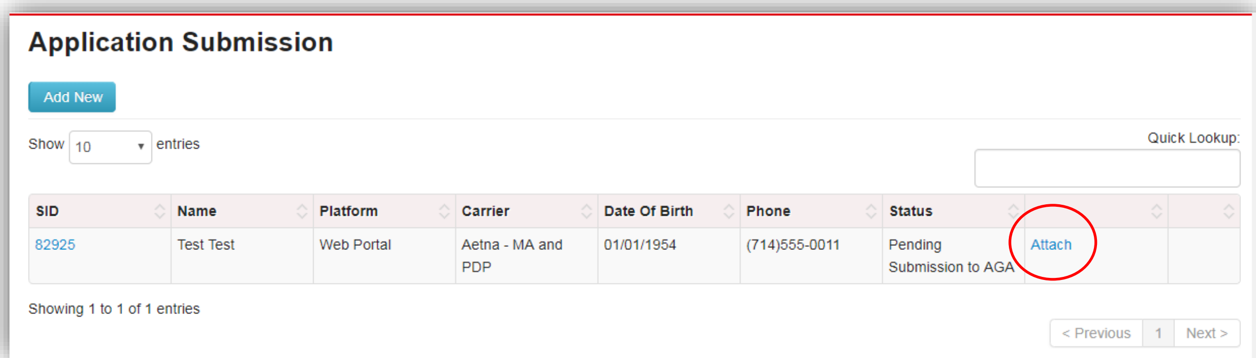


2. Select **Add New** to create a new profile.

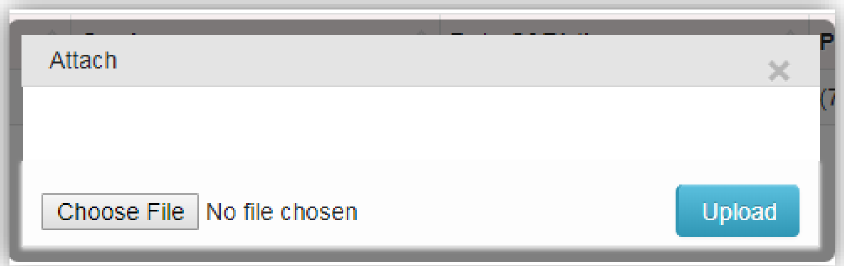
3. Provide member information – First Name, Last Name, Date of Birth, select Carrier from the dropdown selection, and the Phone Number to continue.



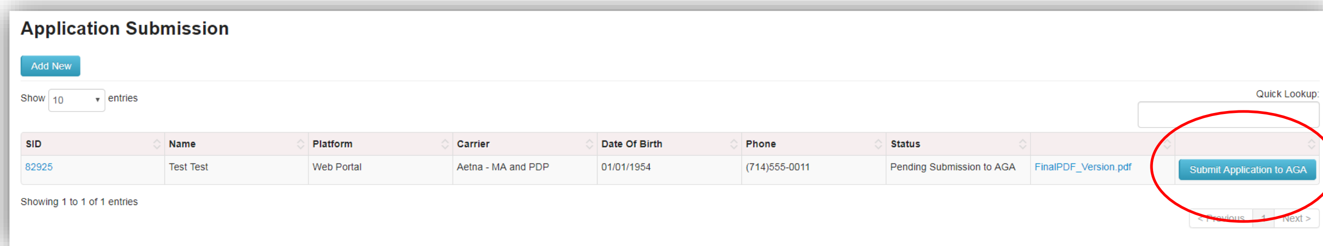
4. Select **Save and Continue**.
5. After the profile has been created, you will be able to attach the PDF for submission.



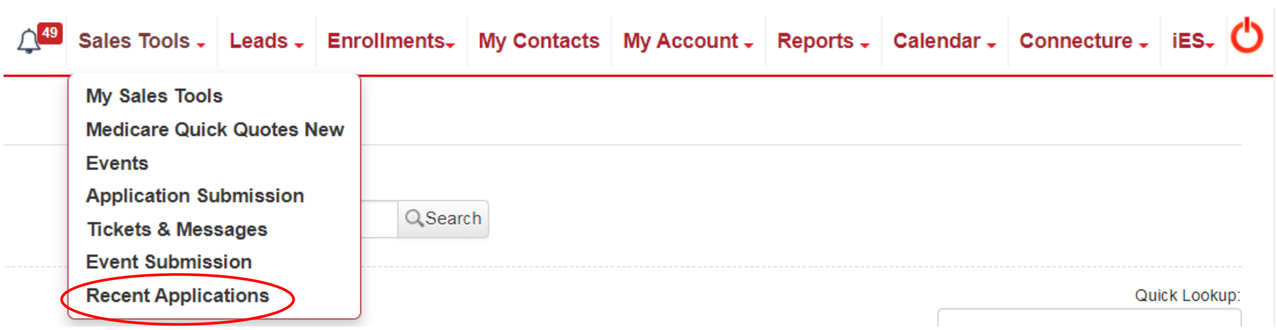
6. A new window will appear and you will be able to upload your desired PDF.



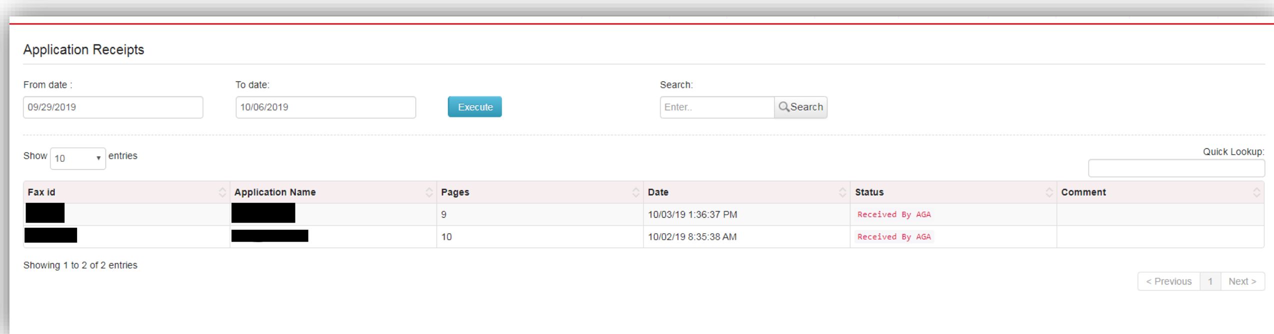
7. After you select your file, click on **Upload**.
8. After the file has been uploaded, select **Submit Application to AGA.**



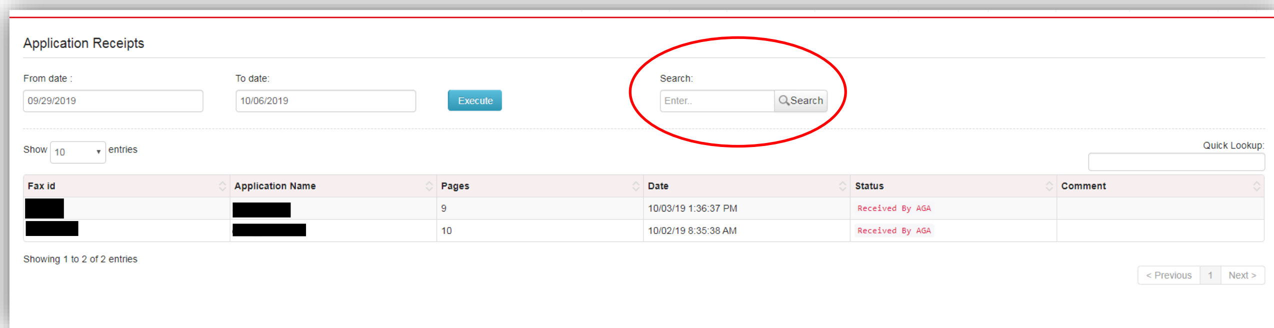
9. Once the application has been received by AGA, the record will appear in your **Recent Applications.**



10. Recently-submitted applications will be shown for the date range provided at the top.



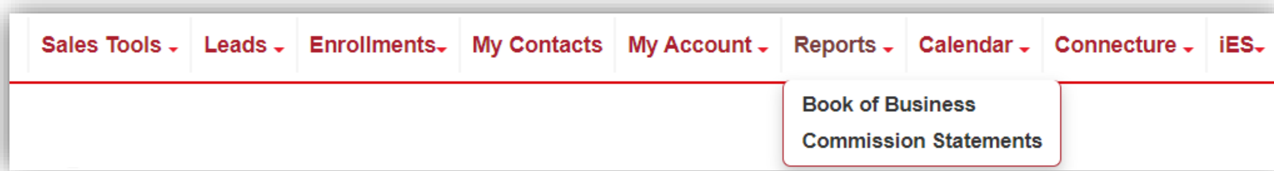
11. To change the applications shown by submission date; update your date range and select **Execute** for the page to refresh.
12. To search for a specific member, regardless of date range provided, use the search bar at the top of the page. If you do not provide any criteria and select **Search**, all logged applications will be shown.
    a. **Quick Lookup** will only sort through records for the date range provided.



    b. Fax ID – your confirmation number for submissions to AGA.
    c. Application Name – Name of beneficiary on application.
    d. Pages – Number of pages received through fax. If the submission was electronic through mobile application or web portal, it will appear as EDF.
    e. Date – Date and time application was logged for processing in AGA system.
    f. Status – Current status of your application submission to AGA.
    g. Comment – If there are missing pages or any further action, it will be indicated here.

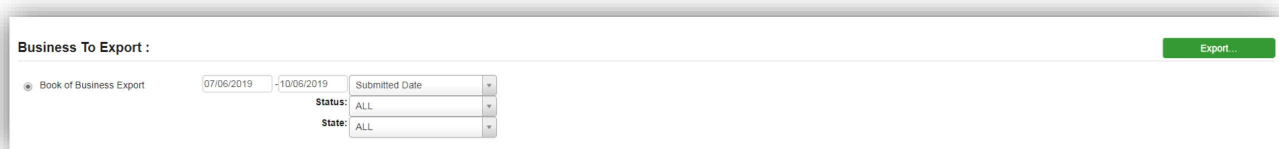
Reports

To generate a book of business report or view your commission statements, select **Reports** from the top menu and select your desired report type.



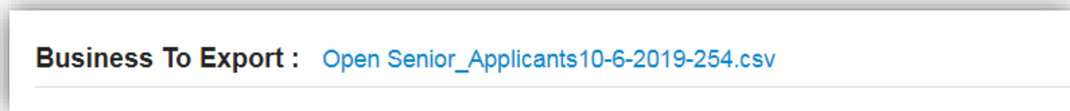
Book of Business

Use this report to view your book of business in its entirety or by a selected range.

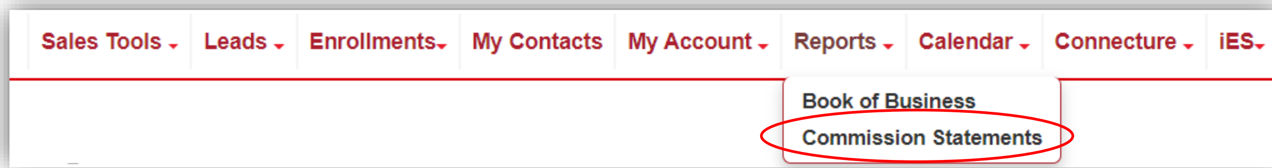


1. Select the date range you would like to view.

   a. To view all applications submitted from the beginning of time, use 1/1/1900 as your start date.
2. Select whether you would like to view by Submitted Date, Effective Date, or Entered Date
3. Select beneficiary status. **All** will generate all members.
4. Select beneficiary state if desired.
5. To generate the report after providing your criteria, select **Export**.
6. A CSV file will be available to download. Click on the blue type and the spreadsheet will automatically open on your computer.



Commission Statements

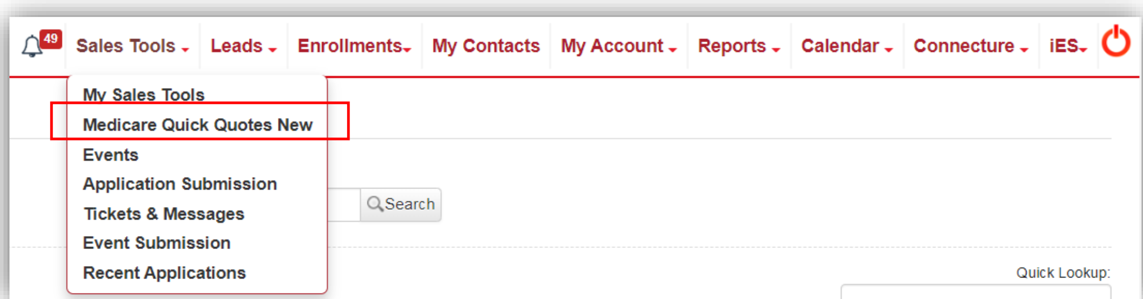


All generated commission statements will be available for download as a PDF or CSV excel spreadsheet.

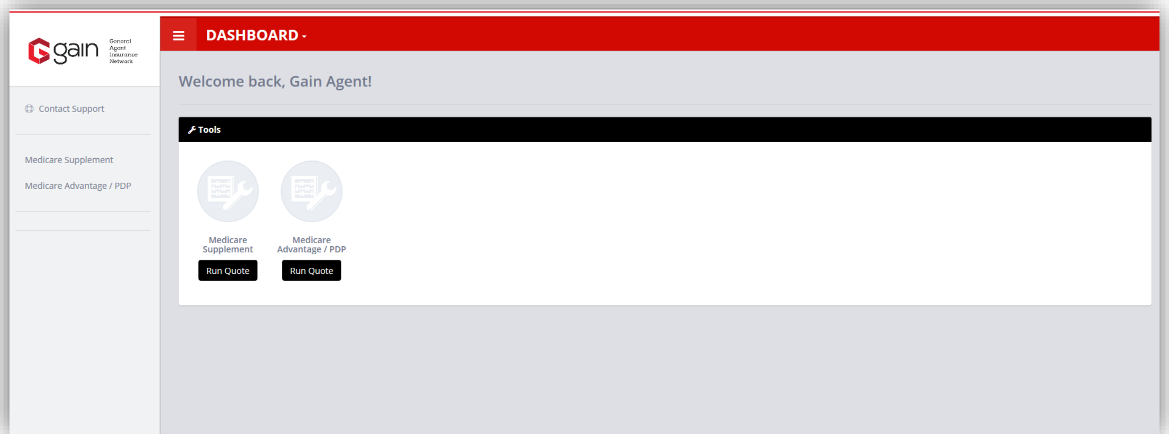
- Note: Statements are not listed in your AGA Agent portal if you are on hold for that statement date. Digital copies can be requested from the Broker Service Team once you are listed in Active status again. Check your profile information for license and E&O expiration dates.
- Negative balances are carried forward until commission is generated to pay it off, or commission is repaid to AGA by check.

Medicare Quick Quotes

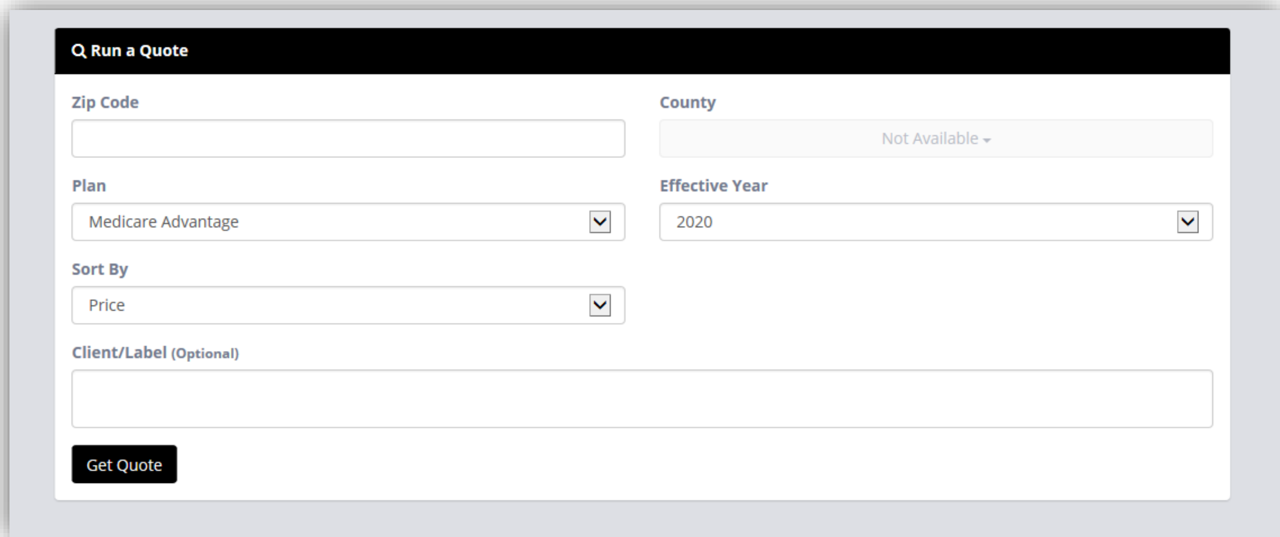
A quoting tool for MAPD, PDP, and Med Supp plans is available in your AGA Agent portal at any time. **Note**: You will need to have cookies enabled on your web browser in order to view the available data.



1. Select **Medicare Quick Quotes New.**



2. Indicate the plan type you would like to quote.
3. Provide required beneficiary information and select **Get Quote.**



   a. All available plans will be shown regardless of agent contracting status.
   b. Quotes will be less accurate if you are not able to include additional health information for your beneficiary.