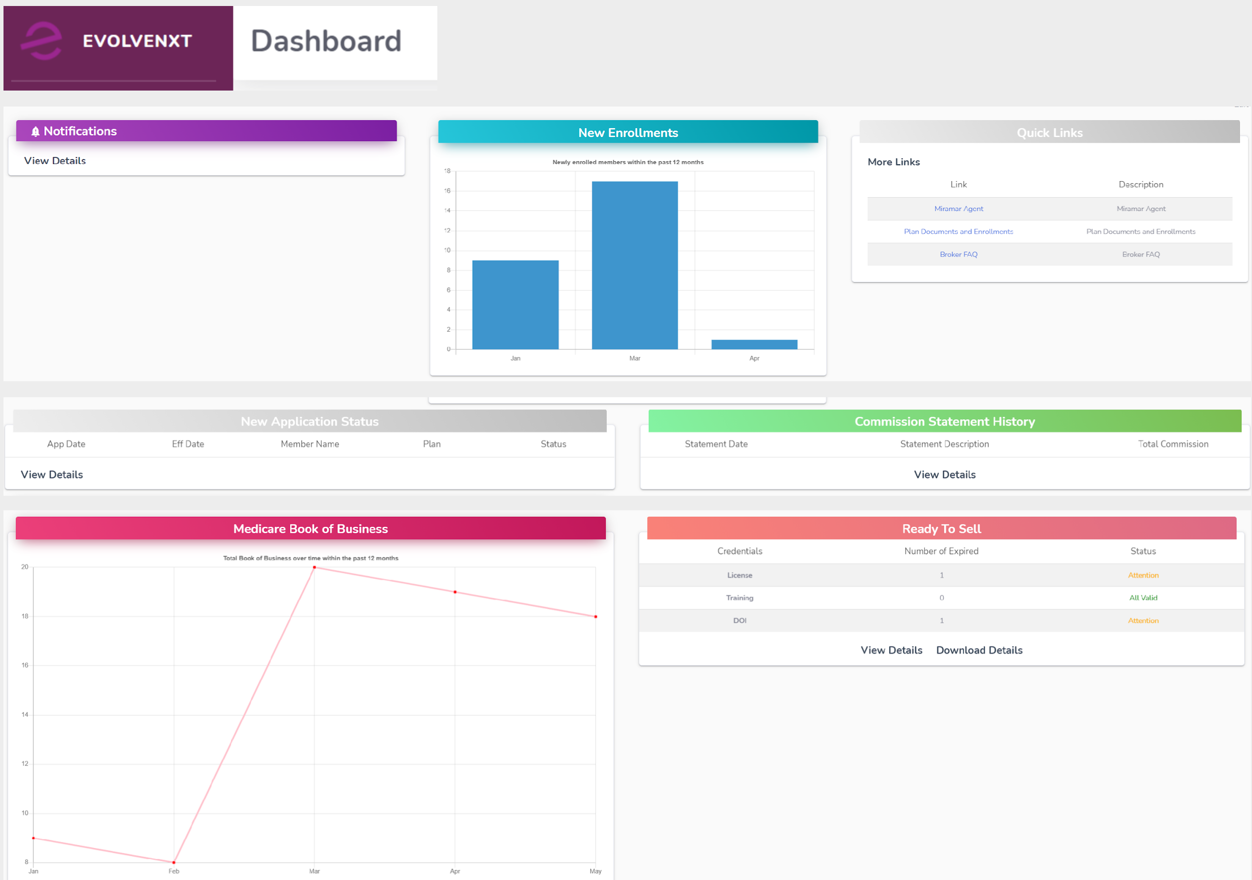
Contents

1. External Agent Portal

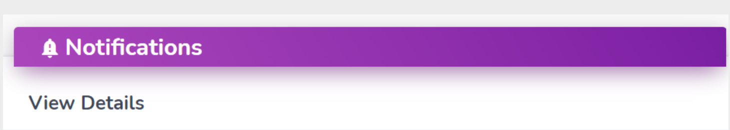
The Agent Portal communicates with agents, giving them details about their membership as well as customized communications from the health plan

1.1 Dashboard

When you log into the Portal, you are directed straight to your dashboard



Notifications

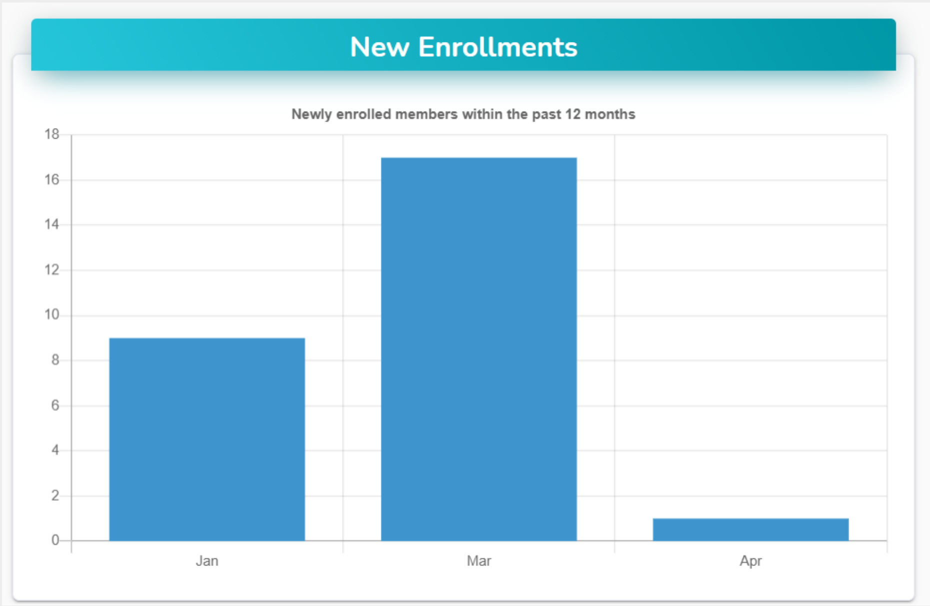


Click on View Details to receive notifications

These notifications have been set up by the system administration to communicate important dates and information that the agent needs to know/be reminded of

<u>New Enrollments</u>

Graphical representation of new enrollments over the past 12 months



<u>Quick Links</u>

Important or helpful URL links to access quickly

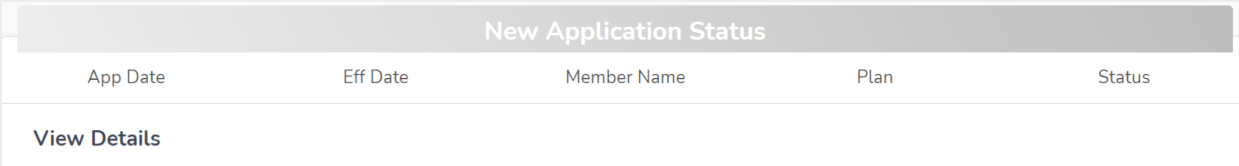
Quick Links

More Links

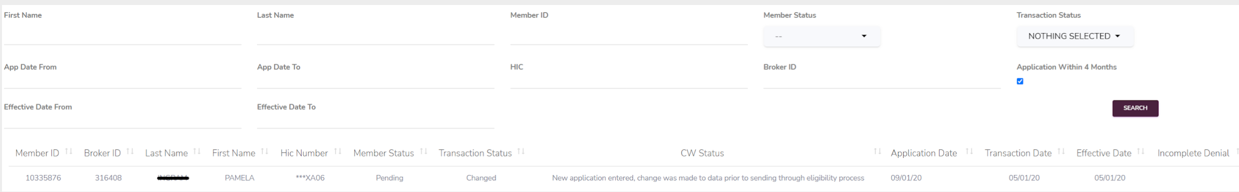
Link	Description
Miramar Agent	Miramar Agent
Plan Documents and Enrollments	Plan Documents and Enrollments
Broker FAQ	Broker FAQ

New Application Status

Shows you a summary of the statuses of new applications – click view details for further information



App Date	Eff Date	Member Name	Plan	Status
View Details				

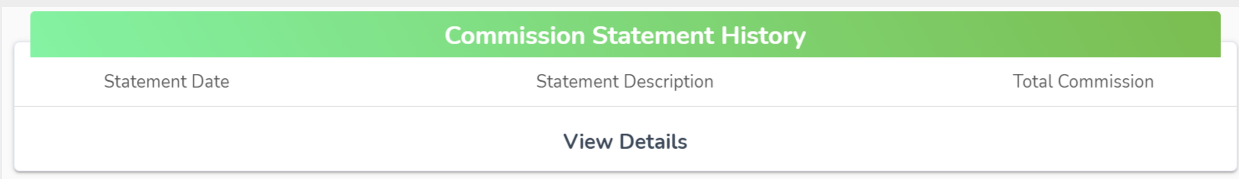


Member ID	Broker ID	Last Name	First Name	Hic Number	Member Status	Transaction Status	CW Status	Application Date	Transaction Date	Effective Date	Incomplete Denial
10335876	316408	[redacted]	PAMELA	***XA06	Pending	Changed	New application entered, change was made to data prior to sending through eligibility process	09/01/20	05/01/20	05/01/20	

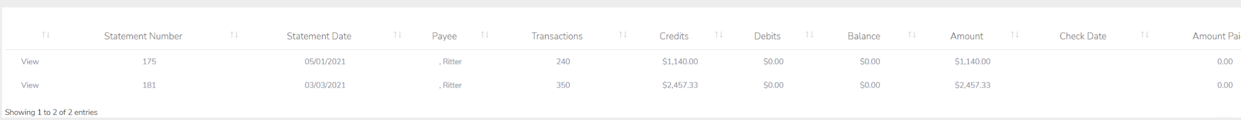
App Status can also be accessed via the Navigation Menu

Commission Statement History

Shows a summary of your statements



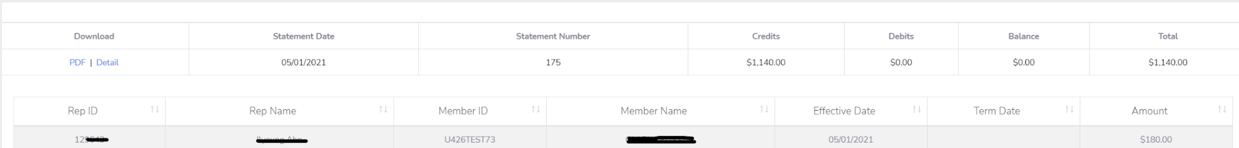
Statement Date	Statement Description	Total Commission
	View Details	



	Statement Number	Statement Date	Payee	Transactions	Credits	Debits	Balance	Amount	Check Date	Amount Paid
View	175	05/01/2021	, Ritter	240	$1,140.00	$0.00	$0.00	$1,140.00		0.00
View	181	03/03/2021	, Ritter	350	$2,457.33	$0.00	$0.00	$2,457.33		0.00

Showing 1 to 2 of 2 entries

All your statements that have been published will be available for viewing in the Portal and in PDF and Excel format– click View next to the statement you would like to review



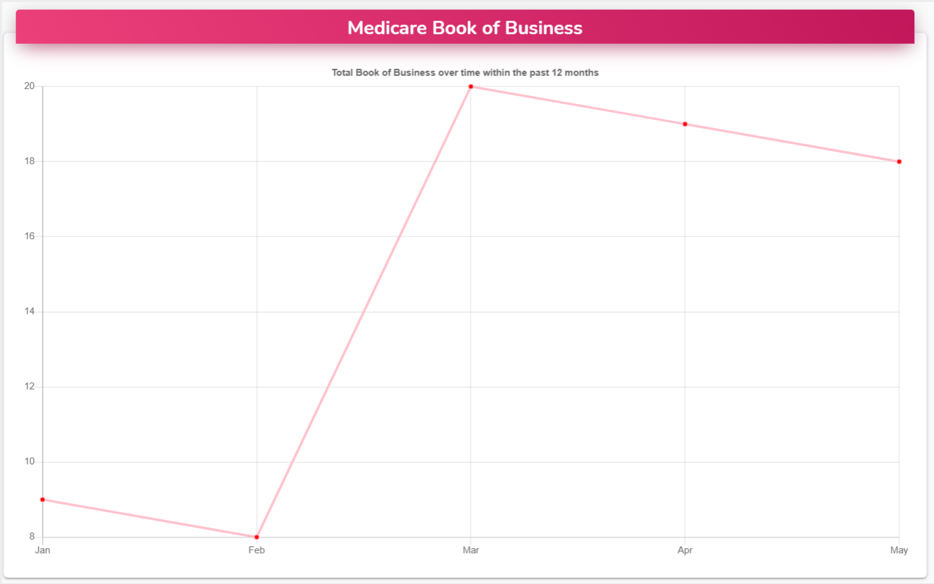
Download	Statement Date	Statement Number	Credits	Debits	Balance	Total
PDF | Detail	05/01/2021	175	$1,140.00	$0.00	$0.00	$1,140.00

Rep ID	Rep Name	Member ID	Member Name	Effective Date	Term Date	Amount
12[redacted]	[redacted]	U426TEST73	[redacted]	05/01/2021		$180.00

Statements can also be accessed via the Navigation Menu

Medicare Book of Business

Graphical representation of total book of business within the last 12 months



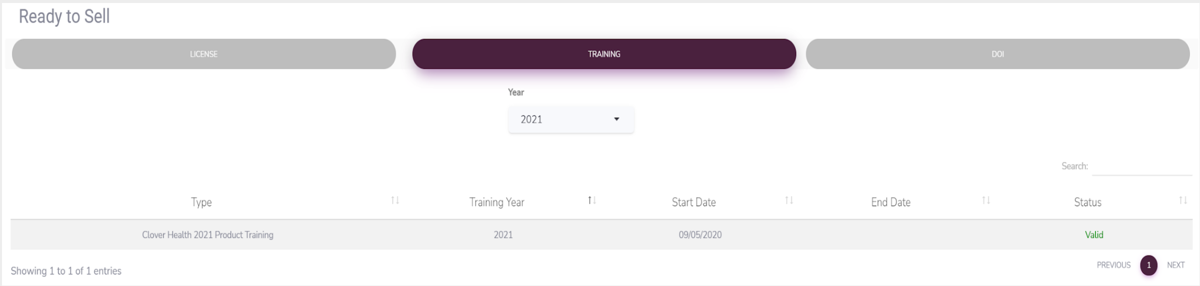
Ready To Sell


Ready To Sell

Credentials	Number of Expired	Status
License	1	Attention
Training	0	All Valid
DOI	1	Attention

View Details Download Details

Click on View Details (to view) or Download Details (to see all)


Ready to Sell

LICENSE TRAINING DOI

Year 2021

Search:

Type	Training Year	Start Date	End Date	Status
Clover Health 2021 Product Training	2021	09/05/2020		Valid

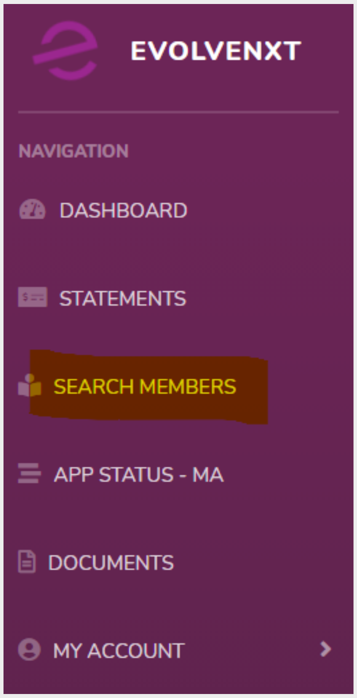
Showing 1 to 1 of 1 entries

PREVIOUS 1 NEXT

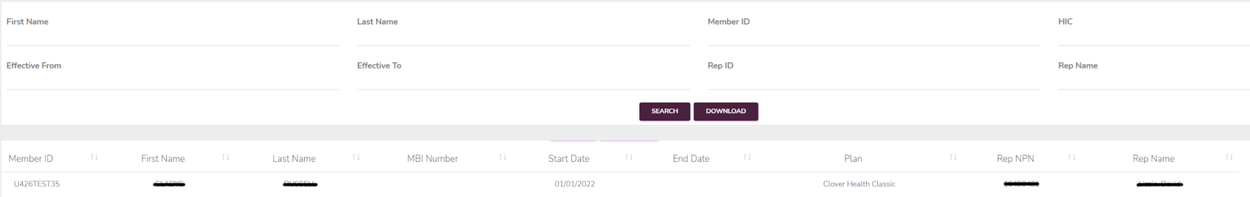
You can view License, Training, and DOI credentials (and status) that are on your agent profile

1.2 Search Members

On the Navigation menu

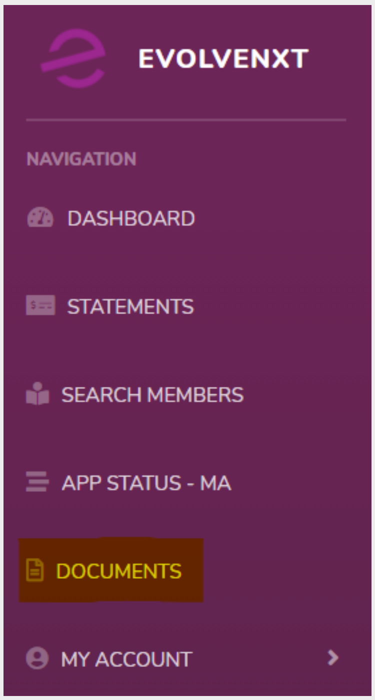


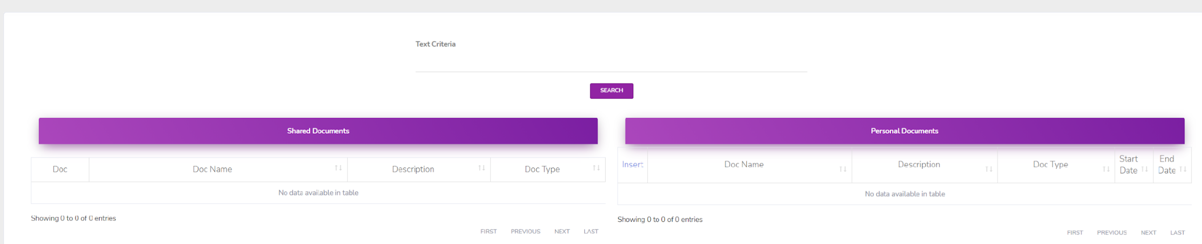
Search for a member using any of the criteria listed below (Name, MBI, Rep ID, etc) or click Search to see all members



1.3 Documents

On the Navigation menu





<u>Shared Documents</u>

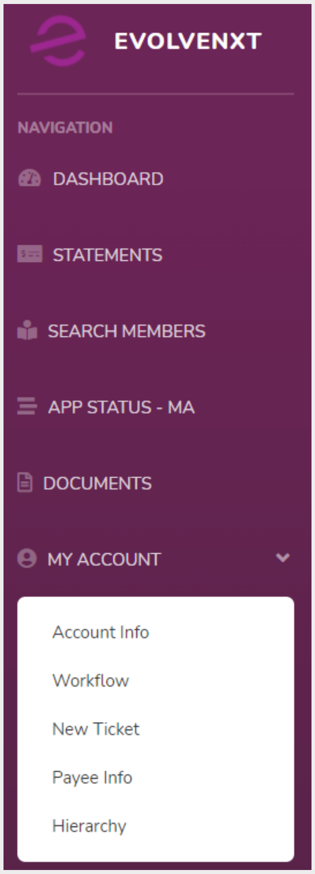
These documents have been shared with the agents by the health plan. These may be such things as announcements, presentations and other tools and information to keep them informed.

<u>Personal Documents</u>

These documents are personal documents that are also available in the agent's profile. These may be such things as contract with the health plan, bank details, etc.

1.4 My Account

On the Navigation menu



Under My Account you can:

View your account information such as your address

Submit a new ticket and follow the Workflow associated with your ticket

Update your banking information

View your hierarchy information