

This document is for users of the Aspirus Agent Portal. It is meant to explain the features available in the portal.

Formatting in this document is as follows:

- *Italic font* – indicates something seen in the system. Things like headers, field names and titles on buttons.
- **Bold font** – indicates an action to be taken such as clicking, selecting, typing and so on.

Table of Contents

Register for the Agent Portal	3
Sign into Agent Portal	4
Need Help Signing in?	4
Navigation Menu.....	4
Workbench.....	5
Agent Workbench - Overview	5
Agent Workbench - Quotes	6
Agent Workbench - Applications	7
Client Management	9
Manage Clients	9
Create New Client	10
Clients List	11
Client Details	11
Clients Details - Application	12
Clients Details - Quotes.....	13
Edit Client.....	15
Medicare Quoting	16
Create Medicare Quoting	16
Medicare Shopping Home	17
Select Medicare Plans	18
Select Dental Plans.....	21
Review Medicare Quote	22
Review Quote / Assign Client.....	23
Manage Quotes.....	24

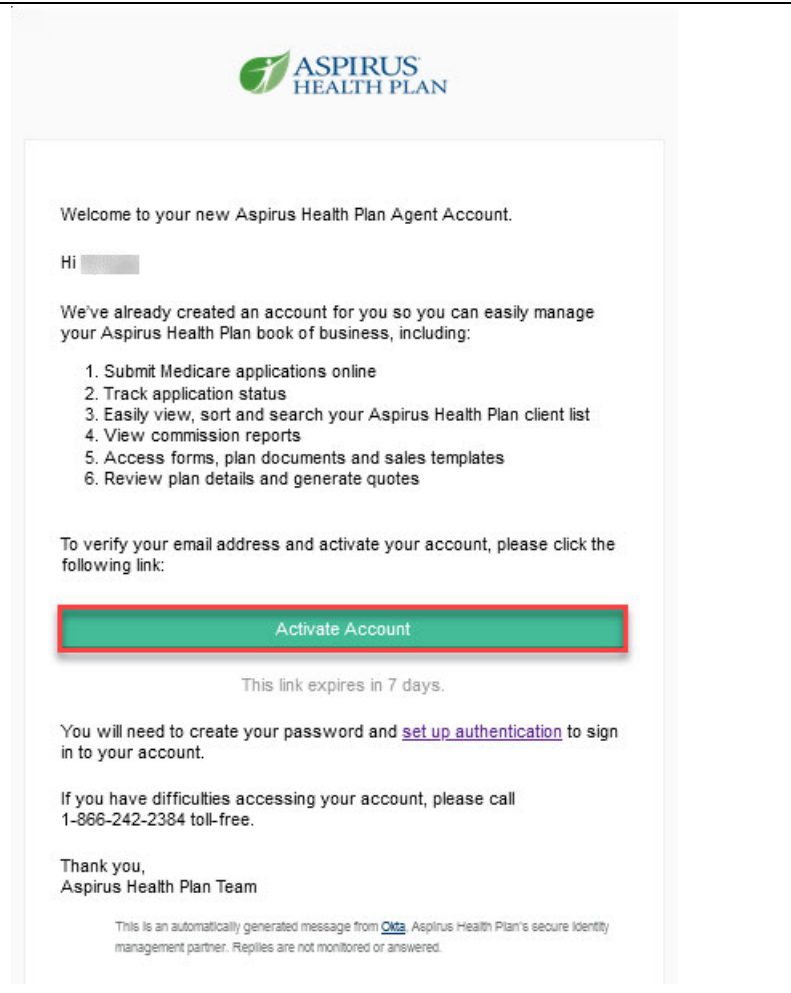
Quote Status	24
Quote List	25
Quote Details	26
Share Quote – PDF	27
Delete Quote Confirmation	27
Workflow Stepper	28
Medicare Applications	29
Create New Medicare Application	29
Start Applications (without Quote)	29
Application Initiation Alternatives	30
You’re Ready to Enroll	32
Before You Start	33
Medicare Eligibility	34
Applicant Information	34
Important Questions	34
Primary Care Clinic Selection	35
Payment Information	36
Review Application	37
Authorization & Signature	38
Application Submission Confirmation	38
Resource Center	39
Members List	40
Member Details	41
Commissions	42
Session Inactivity	42

Register for the Agent Portal

All new Aspirus Health Plan Agents will receive an activation email to complete the Agent Portal registration.

Select **Activate Account** to create your password and set up security questions.

When an Agent sign into the Portal for the first time after registration they will be asked to set up authentication. Follow the [Multifactor Authentication instructions](#) to complete the set up.



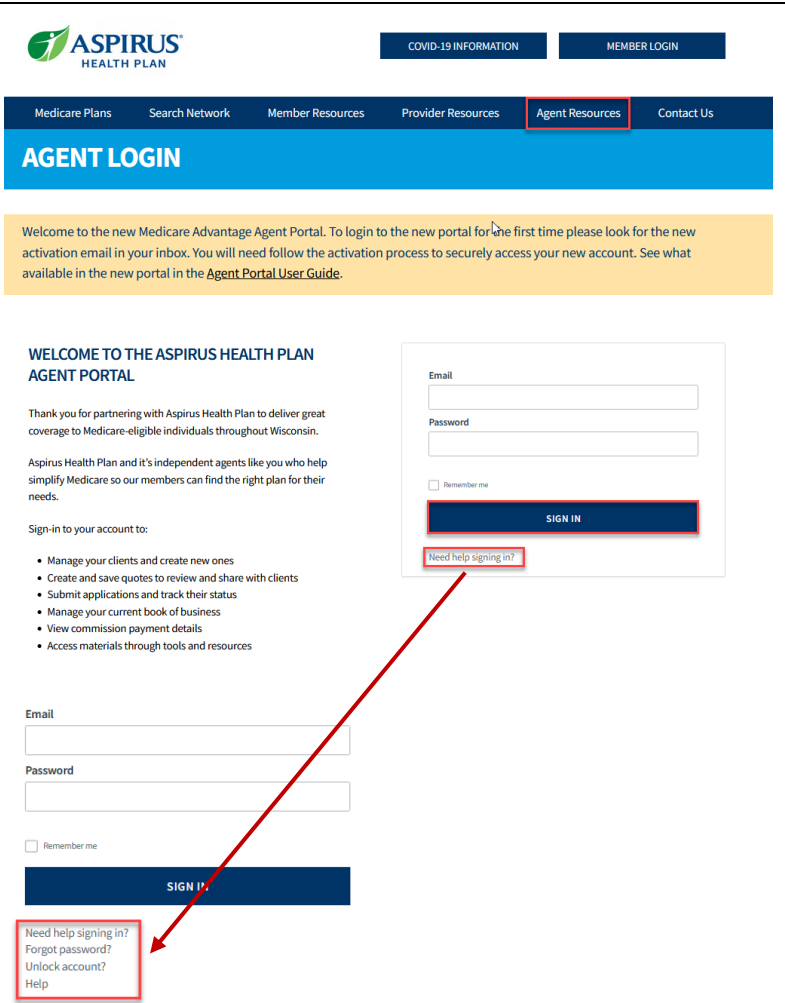
Sign into Agent Portal

Login with your *Email* and *Password*.

Click **SIGN IN**.

Need Help Signing in?

Select **Need help signing in?** to access additional help features for password reset and account unlock.



ASPIRUS
HEALTH PLAN

COVID-19 INFORMATION MEMBER LOGIN

Medicare Plans Search Network Member Resources Provider Resources **Agent Resources** Contact Us

AGENT LOGIN

Welcome to the new Medicare Advantage Agent Portal. To login to the new portal for the first time please look for the new activation email in your inbox. You will need follow the activation process to securely access your new account. See what available in the new portal in the [Agent Portal User Guide](#).

WELCOME TO THE ASPIRUS HEALTH PLAN AGENT PORTAL

Thank you for partnering with Aspirus Health Plan to deliver great coverage to Medicare-eligible individuals throughout Wisconsin.

Aspirus Health Plan and it's independent agents like you who help simplify Medicare so our members can find the right plan for their needs.

Sign-in to your account to:

- Manage your clients and create new ones
- Create and save quotes to review and share with clients
- Submit applications and track their status
- Manage your current book of business
- View commission payment details
- Access materials through tools and resources

Email

Password

Remember me

SIGN IN

[Need help signing in?](#)

Email

Password

Remember me

SIGN IN

[Need help signing in?](#)
[Forgot password?](#)
[Unlock account?](#)
[Help](#)

Navigation Menu

The top navigation bar represents the primary tool for accessing the various pages the Agent will want to utilize in the portal.



ASPIRUS Workbench Clients Quotes Applications Members Resource Center Commissions CONTACT US LOG OUT

Workbench

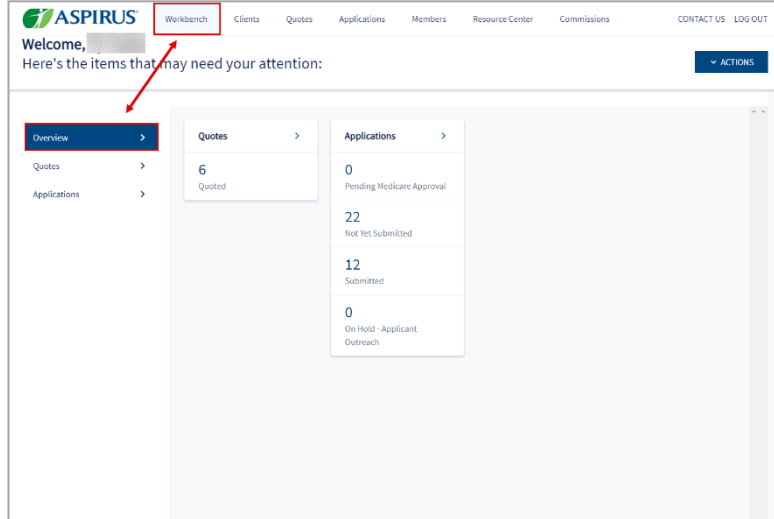
The Workbench is a central dashboard for Agents once they are logged in. There are three sections in the Workbench: Overview, Quotes and Applications.

Agent Workbench - Overview

This feature allows an Agent to view a summary of records requiring action across multiple record types relevant to the Agent.

NOTE: The items found on the *Workbench* include *Quotes* and *Applications* that may require the Agent's attention.

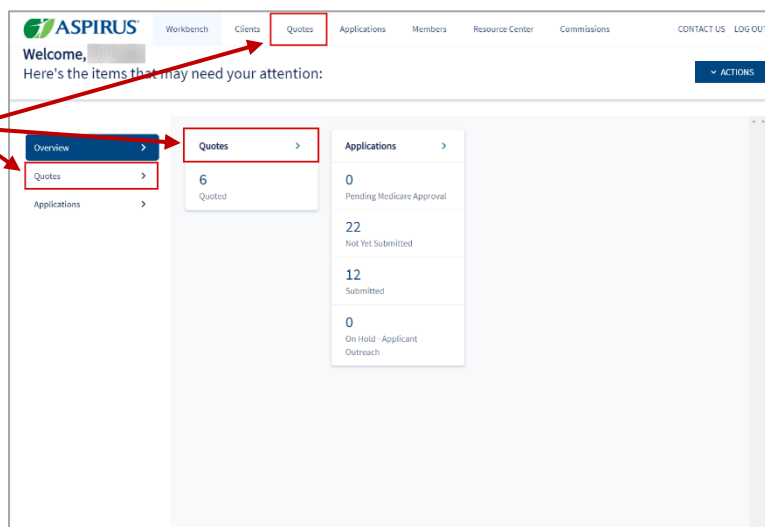
ALSO NOTE: Links to *Quotes* and *Applications* on the navigation bar at the top will give access to all quotes and applications not only those that need attention.



Agent Workbench - Quotes

The Agent may access a list of *Quotes* requiring action on their part by clicking **Quotes** in one of three places – the left navigation bar, the main body of the Agent interface, or the navigation bar at the top of the page.

NOTE: The *Quotes* link in the navigation bar at the top of the page will give access to ALL Quotes, not only those that require the Agent's current attention.



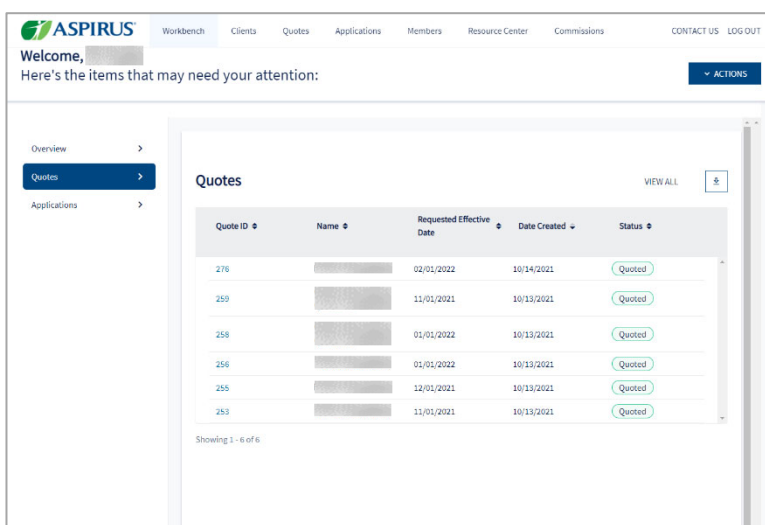
Agent Workbench - Quotes - continued

The following details can be viewed on the *Quotes* list:

- *Quote ID*
- *Name* (of the potential subscriber)
- *Requested Effective Date*
- *Date Created*
- *Status*

A Quote could have one of three statuses:

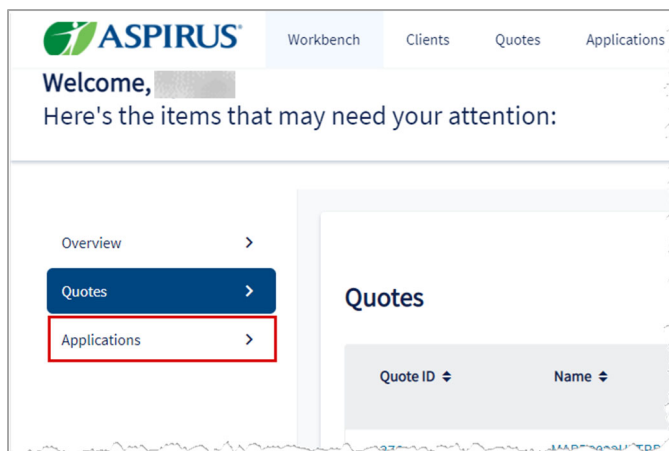
- *Quoted* – the quote has been successfully saved
- *Expired* – the Requested Effective Date has been exceeded
- *Applied* – the Agent has selected plans and initiated an application



Agent Workbench - Applications

The Agent may access a list of *Applications* requiring action on their part by clicking **Applications** on the left navigation bar.

REMEMBER: Clicking *Applications* on the navigation bar at the top gives access to all applications, not only those currently needing your attention.



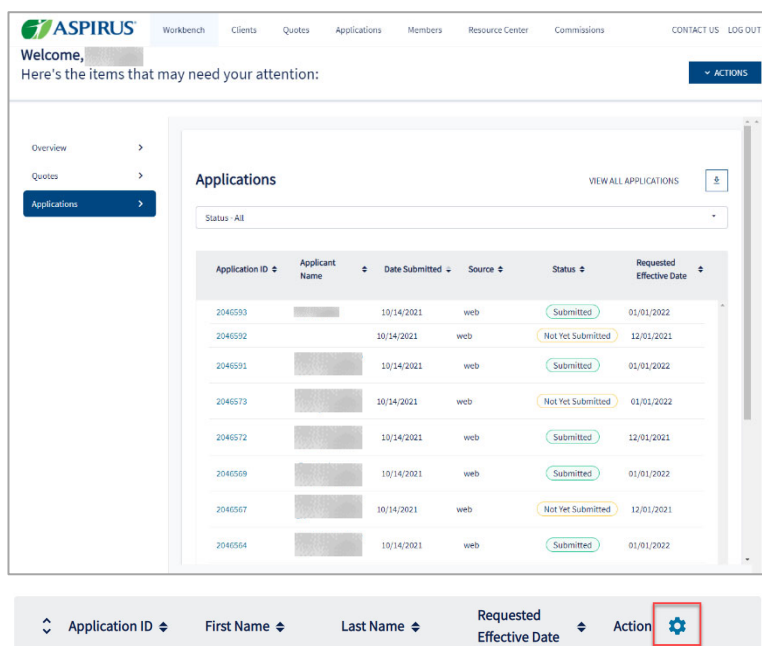
The following details can be viewed on the *Applications* list:

- *Application ID*
- *Applicant Name*
- *Date Submitted*
- *Source*
- *Status*
- *Requested Effective Date*

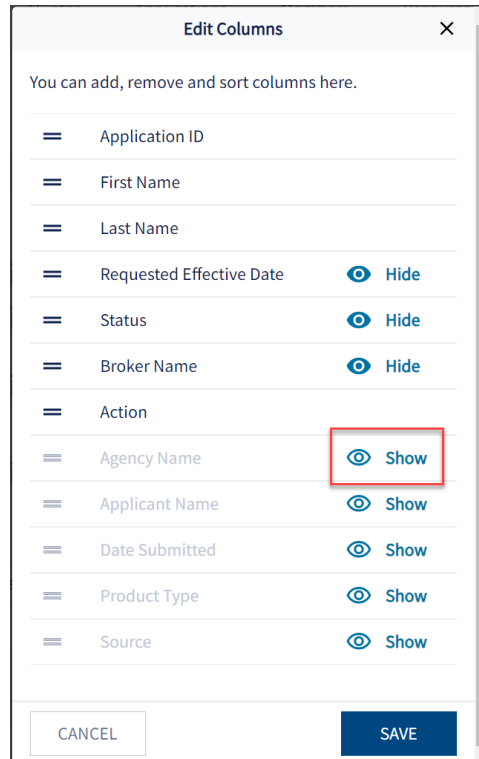
Agents may add additional details to their dashboard by clicking on the **gear icon**. From here they can see additional element to the list by selecting the **show/hide icon**.

An Application could have one of eleven statuses:

- *Not Yet Submitted* – has been started but not yet submitted
- *Expired* – started, but not submitted before the start date
- *Submitted* – the application was submitted. This status will display for up to two hours, then change to “In Progress”



- *In Progress* – submitted and being processed
- *On Hold – Applicant Outreach* – submitted, but more detail is needed from applicant
- *Pending Medicare Approval* – application has been sent to Medicare for review
- *Enrolled* – application has been approved by CMS
- *Duplicate* – received multiple applications
- *Rejected* – application rejected either because one or more required documents were not received, or CMS rejected it due to other reasons
- *Cancelled* – application was cancelled by request
- *Denied* – application was denied due to non-receipt of required information



Edit Columns [X]

You can add, remove and sort columns here.

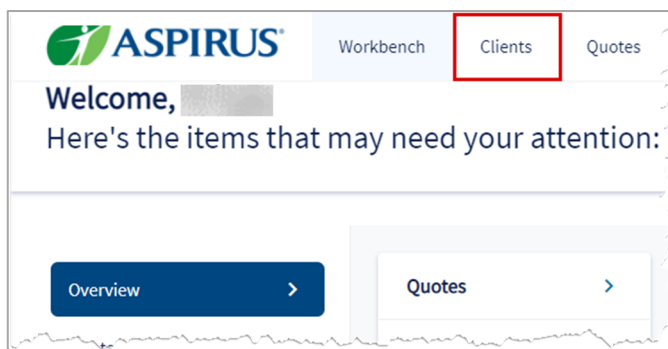
≡	Application ID	
≡	First Name	
≡	Last Name	
≡	Requested Effective Date	Hide
≡	Status	Hide
≡	Broker Name	Hide
≡	Action	
≡	Agency Name	Show
≡	Applicant Name	Show
≡	Date Submitted	Show
≡	Product Type	Show
≡	Source	Show

CANCEL SAVE

Client Management

Client Management allows Agents to manage their clients.


From the *Workbench/Overview* page the Agent may access their Clients list by clicking the **Clients** link on the navigation header bar.



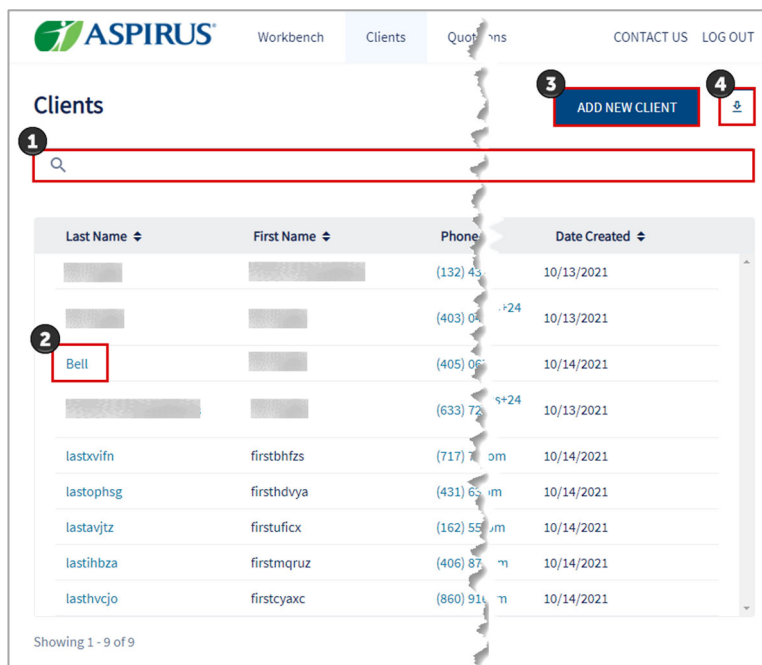
Manage Clients

Agents are able to manage their associated clients on the *Clients* page by: reviewing their client list, adding new clients, editing existing clients and reviewing client details.

Agents may:

1. Search for a client by typing all or part of the name
2. Access the client record by clicking the **Last Name** link
3. Add a new client by clicking the **Add New Client** button
4. Export the entire client list by clicking the export icon 

NOTE: To locate clients who have already been enrolled, go to *Members* on the navigation bar at the top.



Create New Client

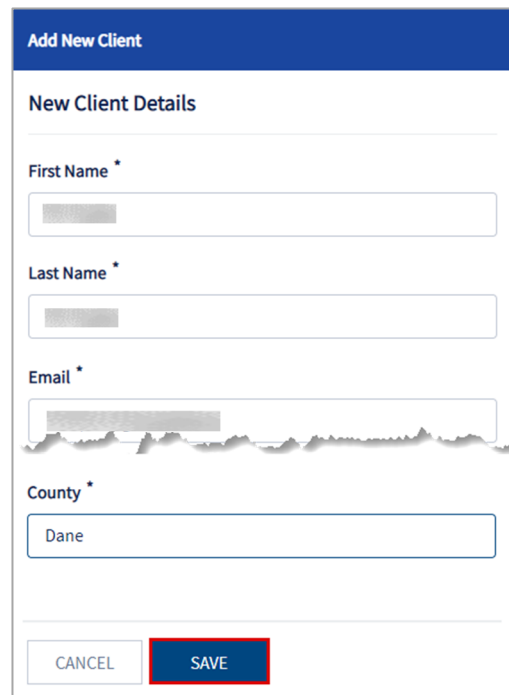
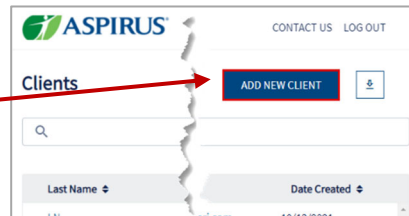
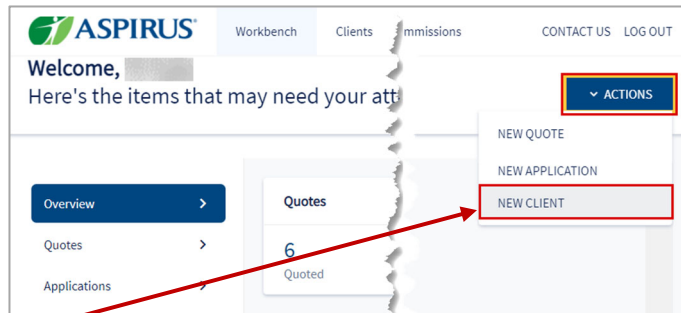
The Agent can create a new client in several different ways and stages of their process. It can be done as a new “stand alone” Client, or at the time a new quote or application is created.

Here we show creating the new Client from the Workbench by clicking **Actions** and **New Client**. Another alternative is to click **Add New Client** from the *Clients* page.

Complete the required fields for the new client such as:

- *First and Last Name*
- *Email*
- *Phone Number*
- *Address including City, State, Zip Code and County*

When all data has been entered, click **Save**.



This screenshot shows the 'Add New Client' form. The form has a blue header with the title 'Add New Client'. Below the header is the 'New Client Details' section. The form contains the following fields: 'First Name *', 'Last Name *', 'Email *', and 'County *'. The 'County' field is pre-filled with 'Dane'. At the bottom of the form are two buttons: 'CANCEL' and 'SAVE'.

Clients List

When the *Clients* list displays, the Agent can search the list and click the **display icon** to open the client record and see any applications and/or quotes for that client.

NOTE: Clicking *Phone Number* prompts making a call to that number. Clicking *Email* initiates an email to that mailbox.

In this example, we click *Last Name* = **Bell** to view the details for this client.

Clients ADD NEW CLIENT

Name, Phone or Email Agent Name Agent ID

First Name	Last Name	Phone	Address	Email	Date Created	Action
		--			08/20/2024	
		--			08/14/2024	
		--			07/05/2024	
		--			06/18/2024	

Client Details

Once the Client record is open, the Agent can view demographic information, as well as any *Applications* or *Quotes* for this client. In addition, a *New Quote* or *New Application* can be initiated from this page.

ASPIRUS Workbench Clients Quotes Applications Members Resource Center Commissions CONTACT US LOG OUT

< All Clients

Bell NEW QUOTE NEW APPLICATION

Applications Quotes

Application ID	Applicant Name	Date Created	Requested Effective Date	Plan	Status
2046553	Bell	10/14/2021	01/01/2022	Elite (PPO)	Submitted
2046591	Bell	10/14/2021	01/01/2022	Aspirus Choice Dental Essential Rx (PPO)	Submitted
2046567	Bell	10/14/2021	12/01/2021	Aspirus Choice Dental Elite (PPO)	Not Yet Submitted
2046564	Bell	10/14/2021	01/01/2022	Aspirus Choice Dental Elite Rx (PPO)	Submitted
2046502	Bell	10/14/2021	01/01/2022	Elite (PPO)	Not Yet Submitted

Clients Details - Application

From the Client record the Agent can view a list of applications related to the client.

When an Agent initiates a new application from the Client details page, a message displays to remind them the application will be associated with the client from whose page the application was launched.

The screenshot shows the client record for 'Bell'. At the top right are buttons for 'NEW QUOTE' and 'NEW APPLICATION'. Below is a table of applications:

Application ID	Applicant Name	Date Created	Requested Effective Date	Plan	Status
2046593	Bell	10/14/2021	01/01/2022	Elite (PPO)	Submitted
2046591	Bell	10/14/2021	01/01/2022	Aspirus Choice Dental Essential Rx (PPO)	Submitted
2046567	Bell	10/14/2021	12/01/2021	Aspirus Choice Dental Elite (PPO)	Not Yet Submitted
2046564	Bell	10/14/2021	01/01/2022	Aspirus Choice Dental Elite Rx (PPO)	Submitted
2046502	Bell	10/14/2021	01/01/2022	Elite (PPO)	Not Yet Submitted

Below the table is a confirmation dialog with the text: "To start an application for Bell select 'Continue'. To start an application for someone else select 'Cancel' and select a different client or create a new one." The dialog has 'Cancel' and 'Continue' buttons. A red arrow points from the 'NEW APPLICATION' button to the 'Continue' button.

To view an application,

- Click the **display icon**.

Application ID	First Name	Last Name	Date Created	Action
2051828	Jeremy		05/09/2023	
2051532			04/23/2023	

The status of this application is *Not Yet Submitted*, meaning the Agent is still working to enter all the information for this applicant.

There is a progress bar which shows the step or stage this application is currently at – in this example it's the first step, *Applicant Information*.

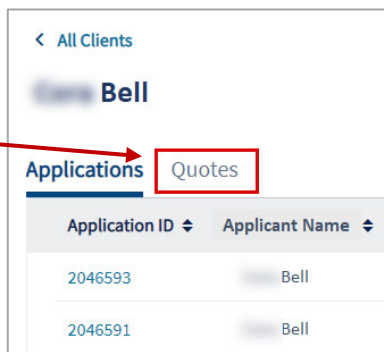
When you are done viewing the application, click **Save & Exit** to go back to the Client record.

The screenshot shows the 'Applicant Information' form. At the top is a progress bar with steps: 1. Applicant Information (highlighted with a red box), 2. Medicare Questions, 3. Payment Method, 4. Review Application, 5. Sign and Complete, 6. Confirmation. The form fields include:

- Profile: What is your relationship to the enrollee? * (Radio buttons for Self, Legal Guardian, Power of Attorney)
- Requested Effective Date * (Date picker set to 01/01/2022)
- Prefix (Text input)
- First Name * (Text input)
- Middle (Text input)
- Last Name * (Text input)

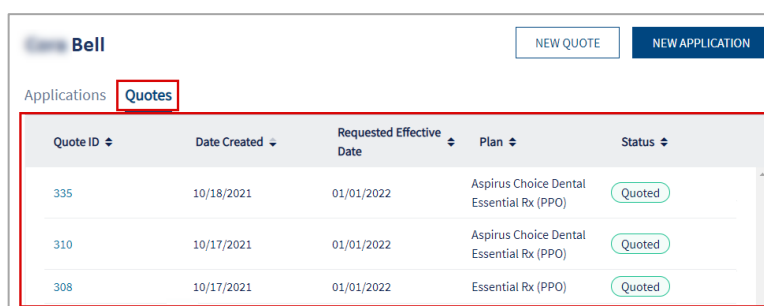
At the bottom right are buttons for 'SAVE & EXIT' (highlighted with a red box) and 'SAVE & CONTINUE'.

To view quotes for this same applicant/client, click the header link for *Quotes*.

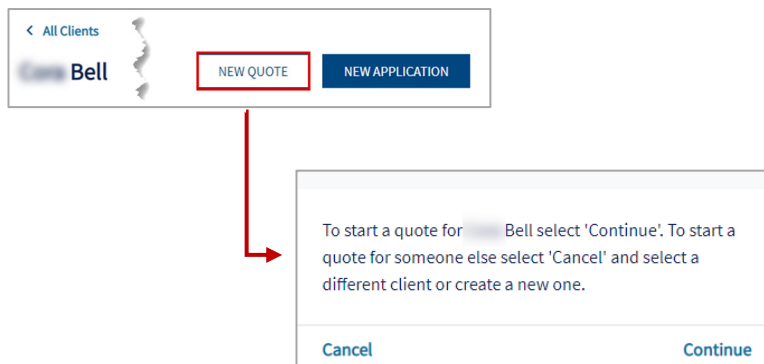


Clients Details - Quotes

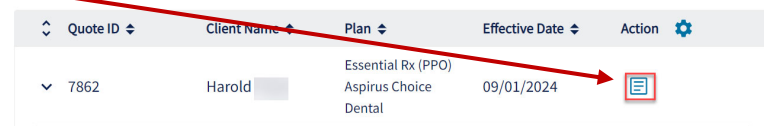
From the Client record the Agent can view a list of quotes related to that client.



When an Agent initiates a new quote from the Client details page, a message displays to remind them the quote will be associated with the client from whose page the quote was launched.



To view a quote for this client, click the **display icon**.



The quote shows high-level details of any included *Plans*. The Agent may view *Quote Criteria* as well as, when ready, **Select Plan** for any or all plans included in the quote, and **Enroll** the client from this page.

Quote #310 Quoted

Plans Quote Criteria

Health & Drug Coverage

Essential Rx (PPO)

Access to Aspirus Health providers with \$0 premium, drug coverage and affordable out-of-pocket costs

\$0.00 Monthly Premium	\$0.00 Annual Deductible	\$5,900.00 Out of Pocket Max
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Primary Care Doctor Office Visits: In Network Copay: \$0 copay
Specialty Office Visits: In Network Copay: \$45 copay
Benefit Highlights: Highlights: Annual physical: Yes ; Dental: Yes; Eyewear: Yes; Hearing Aids: Yes; Hearing: Yes; Medicare Part D: Yes; Over-the-counter: Yes; Vision: Yes; Worldwide emergency care: Yes

[View details](#) [SELECT PLAN](#)

Dental

Aspirus Choice Dental

Optional dental coverage to enhance included routine dental coverage

\$25.00 Monthly Premium	\$75.00 Annual Deductible	\$2,000.00 Annual Plan Maximum
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Oral examinations: Dental: Two per year
Routine cleanings: Dental: Two per year
X-rays: Dental: Annual bitewing and full mouth every 5 years

[View details](#) [SELECT PLAN](#)

[ENROLL](#)

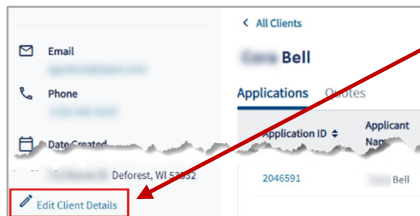
Edit Client

The Agent may make edits to client information by clicking **Edit Client Details**.

In the *Edit Client* window, these are the fields that may be updated:

- *First Name*
- *Last Name*
- *Email*
- *Phone Number*
- *Address (Lines 1 & 2)*
- *City*
- *State*
- *Zip*
- *County*

Once all edits have been made, click **Save**.



Edit Client Details.

Edit Client

New Client Details

First Name *

Last Name *

Email *

Phone Number *

Address Line 1 *

Address Line 2

County *

Medicare Quoting

Medicare Quoting allows Agents to obtain a Medicare quote for Medicare Advantage, Medicare Supplement and Medicare Part D plans.

On the Home page (*Workbench*) of the Agent Portal there are several access points for the new Medicare Quoting functionality.

Create Medicare Quoting

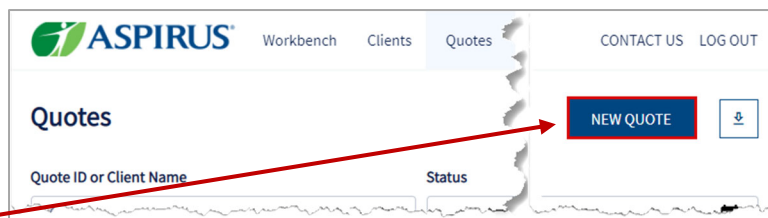
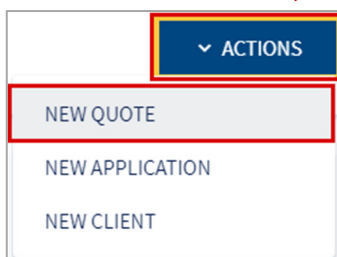
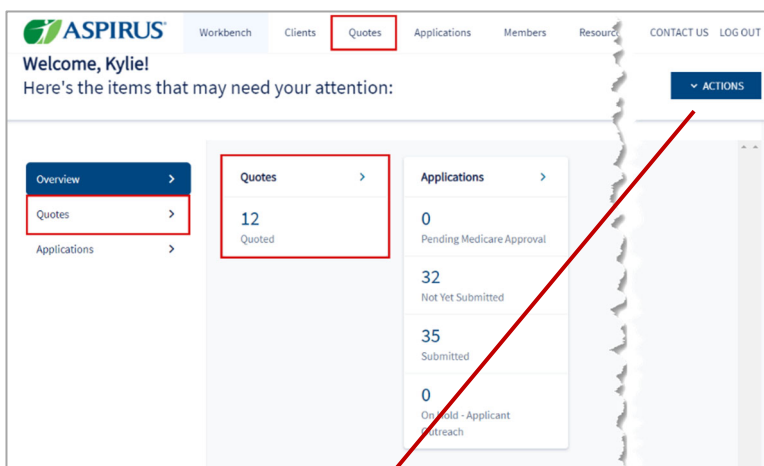
Agents generate a new Medicare quote using the 'Create New Quote' feature.

The feature consists of the following workflow steps:

1. Medicare Shopping Home
2. Select Medicare Plans
3. Select Ancillary Plans (separate Dental plans)
4. Review Medicare Quote

From the *Workbench*, click the **Actions** button and choose **New Quote** to begin creating a new Medicare quote.

It is also possible to initiate a new quote from the *Quotes* page. Click the **New Quote** button to begin.



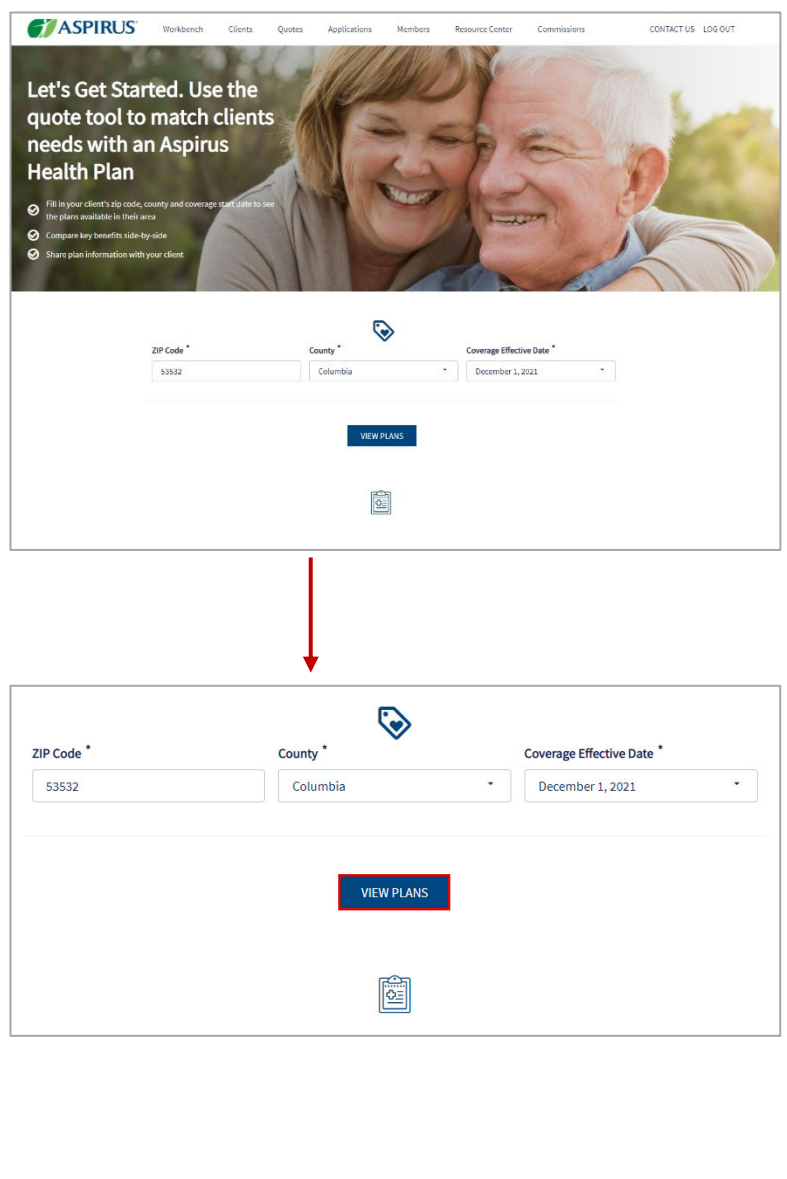
Medicare Shopping Home

This feature serves as the landing page of the Medicare Shopping Portal as well as the start of Quoting for Agents.

This new quote tool simplifies how the Agent will present plan options to their clients.

To use the tool, the Agent follows these 3 steps:

1. Enter the client's *Zip Code, County* and *Coverage Effective Date*
2. Compare key benefits to the clients in a side-by-side format
3. Share plan information with their client



The screenshot displays the Aspirus Medicare Shopping Home interface. At the top, there is a navigation bar with the Aspirus logo and links for Workbench, Clients, Quotes, Applications, Members, Resource Center, Commissions, CONTACT US, and LOG OUT. Below the navigation bar is a hero section with a photo of a smiling couple and the text: "Let's Get Started. Use the quote tool to match clients needs with an Aspirus Health Plan". Underneath the hero section are three bullet points: "Fill in your client's zip code, county and coverage start date to see the plans available in their area", "Compare key benefits side-by-side", and "Share plan information with your client". The main content area features a form with three input fields: "ZIP Code" (containing "53532"), "County" (containing "Columbia"), and "Coverage Effective Date" (containing "December 1, 2021"). A blue "VIEW PLANS" button is positioned below the form. A red arrow points from the "VIEW PLANS" button in the top screenshot to the "VIEW PLANS" button in the bottom screenshot, which is highlighted with a red border, indicating the next step in the process.

Select Medicare Plans

Select Health Plans without Drug Coverage Tab

This feature allows Agents to review plans returned in their Medicare quote that do not include drug coverage.

Click the tab labeled **Health Plans without Drug Coverage**.

Select Health & Drug Coverage Tab

Agents may also review plans that include drug coverage.

Click the tab labeled **Health & Drug Coverage**.

Compare Medicare Plans

This feature allows Agents to review plans benefits side by side for comparison.

As noted in the section to *Compare*, up to 4 plans may be selected and compared.

To select a plan to be included in the comparison exercise, check the **box** labeled *Compare* in the plan details area.

By checking the boxes, the plans are added to the *Compare panel*. When the Agent is satisfied with their selections, they will click **Compare Plans**.

NOTE: The comparison results can be sorted in one of four possible ways:

- *Lowest Monthly Premium*
- *Lowest Deductible*
- *Plan Name A – Z*
- *Plan Name Z – A*

NOTE II: It is also possible to filter the plans in comparison by either the Monthly Premium or the Deductible amounts.

Seeing the selected plans side by side is helpful in comparing things like costs for office and specialist visits, out of pocket maximum amounts, and dental, vision, and pharmacy coverage levels.

PDFs of the *Summary Of Benefits*, *Drug Formulary* and *Evidence Of Coverage* for each plan are available.

When finished examining and analyzing the plans, you may return to the previous page and see all plans by clicking **Back to All Plans**.

The screenshot shows a comparison table for two plans. A red arrow points to a 'Back to All Plans' button at the top left. Another red arrow points to the 'Summary Of Benefits', 'Drug Formulary', and 'Evidence Of Coverage' links at the bottom of the table.

	Essential Rx (PPO) \$0	Elite Rx (PPO) \$79
Primary Care Doctor Office Visits	In Network Copay: 50 copay	In Network Copay: 50 copay
Specialty Office Visits	In Network Copay: 545 copay	In Network Copay: 540 copay
Benefit Highlights	Highlights: Annual physical: Yes; Dental: Yes; Eyewear: Yes; Hearing Aids: Yes; Hearing: Yes; Medicare Part D: Yes; Over-the-counter: Yes; Vision: Yes; Worldwide emergency care: Yes	Highlights: Annual physical: Yes; Dental: Yes; Eyewear: Yes; Hearing Aids: Yes; Hearing: Yes; Medicare Part D: Yes; Over-the-counter: Yes; Vision: Yes; Worldwide emergency care: Yes
Urgent Care	In Network Copay: 525 copay	In Network Copay: 525 copay
Ambulance	In Network Copay: 5275 copay	In Network Copay: 5250 copay
Annual Physical	Routine Copay: 50 copay	Routine Copay: 50 copay
Emergency Care	Emergency Care Copay: 590 copay (waived if admitted within 24 hours)	Emergency Care Copay: 590 copay (waived if admitted within 24 hours)
Routine Hearing Exam	Routine Copay: 1 per year, 50 copay	Routine Copay: 1 per year, 50 copay
Inpatient Hospital Care	In Network Copay: 5350 copay per day (days 1 - 30)	In Network Copay: 5300 copay per stay (not per day), then
	Summary Of Benefits Drug Formulary Evidence Of Coverage	Summary Of Benefits Drug Formulary Evidence Of Coverage

After returning to the plans under review, if the Agent is ready to proceed, they click **Select Plan**. For the plan they've chosen *Select Plan* now reads *Selected*. The Agent may now click **Continue** to move to the next page.

The screenshot shows the details for the Elite (PPO) plan. It includes a description, cost breakdown, and benefit highlights. A red arrow points to the 'SELECT PLAN' button.

Elite (PPO)

For those who want a plan without Part D drug coverage, with rich benefits and low out-of-pocket costs for a \$0 premium

\$0.00 Monthly Premium	\$0.00 Annual Deductible	\$4,000.00 Out of Pocket Max
----------------------------------	------------------------------------	--

Primary Care Doctor Office Visits: In Network Copay: \$0 copay
 Specialty Office Visits: In Network Copay: \$40 copay
 Benefit Highlights: Highlights: Annual physical: Yes; Dental: Yes; Eyewear: Yes; Hearing Aids: Yes; Hearing: Yes; Medicare Part D: No; Over-the-counter: Yes; Vision: Yes; Worldwide emergency care: Yes

View details Compare **SELECT PLAN**

The screenshot shows the details for the Essential Rx (PPO) plan. It includes a description, cost breakdown, and benefit highlights. A red arrow points to the 'SELECTED' button. Below the plan details, it shows 'You've selected 1 Health & Drug Coverage' and a 'CONTINUE' button.

Essential Rx (PPO)

For those who want a plan without Part D drug coverage, with rich benefits and low out-of-pocket costs for a \$0 premium

\$0.00 Monthly Premium	\$0.00 Annual Deductible	\$4,000.00 Out of Pocket Max
----------------------------------	------------------------------------	--

Primary Care Doctor Office Visits: In Network Copay: \$0 copay
 Specialty Office Visits: In Network Copay: \$40 copay
 Benefit Highlights: Highlights: Annual physical: Yes; Dental: Yes; Eyewear: Yes; Hearing Aids: Yes; Hearing: Yes; Medicare Part D: No; Over-the-counter: Yes; Vision: Yes; Worldwide emergency care: Yes

View details Compare **SELECTED**

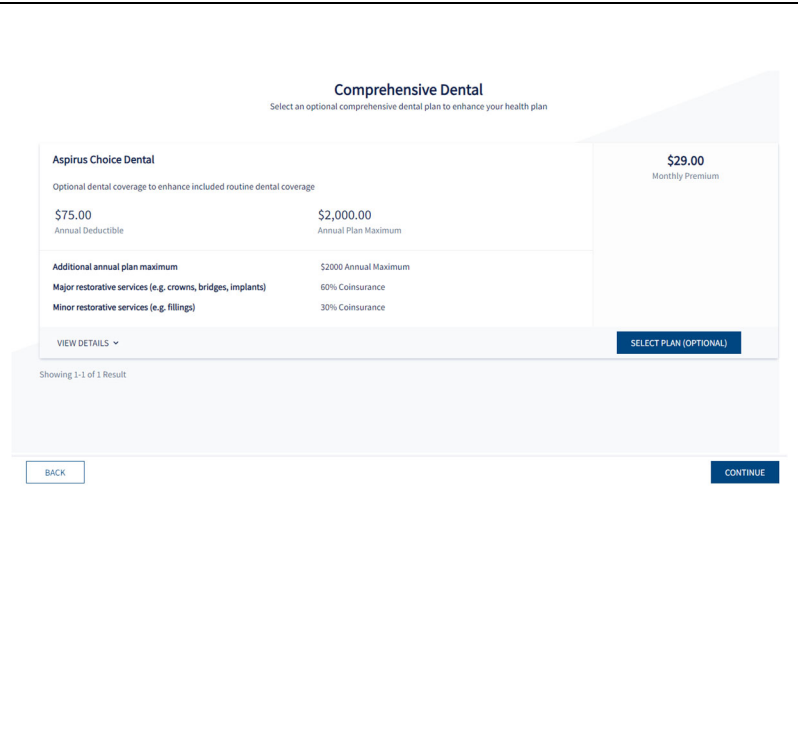
You've selected 1 Health & Drug Coverage **CONTINUE**

Select Dental Plans

Agents may review and select separate, *Comprehensive Dental* plans that can be added to the quote based on their Medicare plan selections

This step is an optional step within the Medicare quoting workflow and is only available if the carrier offers *Comprehensive Dental* plans that can be purchased alongside the Medicare plans selected in the preceding step.

When ready to move on, click **Continue**.



Comprehensive Dental
Select an optional comprehensive dental plan to enhance your health plan

Aspirus Choice Dental		\$29.00 Monthly Premium
Optional dental coverage to enhance included routine dental coverage		
\$75.00 Annual Deductible	\$2,000.00 Annual Plan Maximum	
Additional annual plan maximum		\$2000 Annual Maximum
Major restorative services (e.g. crowns, bridges, implants)		60% Coinsurance
Minor restorative services (e.g. fillings)		30% Coinsurance

VIEW DETAILS ▾ [SELECT PLAN \(OPTIONAL\)](#)

Showing 1-1 of 1 Result

[BACK](#) [CONTINUE](#)

Review Medicare Quote

This feature allows Agents to review the quote criteria used to generate the quote along with the Agent's plan selections.

From here, Agents can save the quote, begin the enrollment process, or create a proposal.

In this example, click **Save Quote**.

Review Quote

Please review your quote before saving. You can find your saved quotes on your Workbench or under Quotes.

Quote Criteria

ZIP Code	53532
County	Columbia
Requested Effective Date	01/01/2025

Plan Selected

Aspirus Choice Dental

Optional dental coverage to enhance included routine dental coverage

\$75.00 Annual Deductible	\$2,000.00 Annual Plan Maximum
------------------------------	-----------------------------------

Additional annual plan maximum

Major restorative services (e.g. crowns, bridges, implants)	\$2000 Annual Maximum
Minor restorative services (e.g. fillings)	60% Coinsurance
	30% Coinsurance

VIEW DETAILS ▾

SELECT FOR ENROLLMENT

Essential Rx (PPO)

Access to Aspirus Health providers with \$0 premium, drug coverage and affordable out-of-pocket costs

\$0.00 Annual Deductible	\$4,500.00 Out of Pocket Max
-----------------------------	---------------------------------

Dental coverage - Routine dental with optional coverage available

Part D: deductible	\$245
Primary doctors visit	\$0 Copay
Routine physical exam	\$0 Copay
Specialist doctors visit	\$40 Copay

VIEW DETAILS ▾

SELECT FOR ENROLLMENT

ENROLL **SAVE QUOTE**

Review Quote / Assign Client

The Review Quote window includes assigning a client to the quote and confirming their information such as First and Last Name, Email, Phone, Address and County. The Agent may save the quote for an existing Client by searching for them by name, or for a new client by creating the client record.

If the choice is to save for a new client, the Agent enters all the demographic details on this page.

Then, the Agent clicks **Confirm**.

+ Assign Client

Select Client Type

Search by client name

Bell:

Review Quote

You can save this quote for an existing or new Client. The quote will display on your dashboard.

+ Assign Client

Select Client Type

First Name *


Last Name *

Email Address *

Phone Number *

Address Line 1 *

Remove Plan Confirmation

When an Agent tries to remove a plan from the quote by clicking the 'Trash Can' icon , they will be asked to confirm their intent to remove the selected plan.

To remove the plan, click **Remove**.

If you do not intend to remove the plan, click **Cancel**.

Aspirus Choice Dental

Optional dental coverage to enhance included routine dental coverage

\$25.00 Monthly Premium	\$75.00 Annual Deductible	\$2,000.00 Annual Plan Maximum
-----------------------------------	-------------------------------------	--

Remove Plan

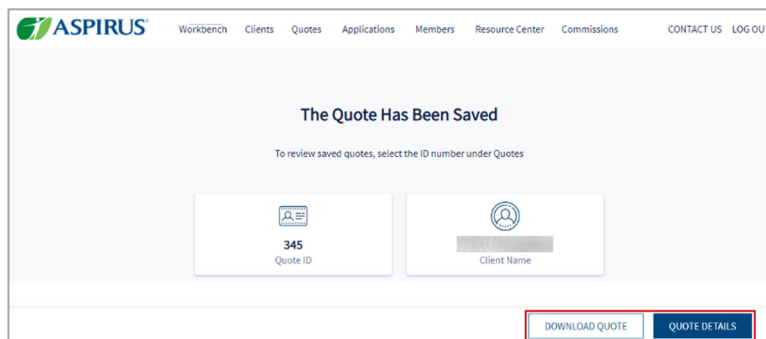
You are about to remove the following plan from this quote. Are you sure you want to remove this plan?

Aspirus Choice Dental

Save Quote Confirmation

You receive confirmation the quote has been saved.

You may view details of the quote by clicking *Quote Details*. You may also use the *Download Quote* button to download them to your device.



Manage Quotes

Quote Status

This list explains the statuses that are used to track the lifecycle of a quote.

- **Quoted** – The quote has been successfully saved has been started but not yet submitted
- **Expired** – The quote has expired because it is passed the requested effective date
- **Application in Progress** – An application has been started from the quote but it has not been submitted.
- **Application Submitted** – An application has been submitted from this quote

Quote List

The Agent can view a list of Quotes across all Clients on the *Quotes* list page.

They may search for a quote by entering the *Quote ID*, the *Client Name* and/or the *Requested Effective Date*.

It is also possible to filter the Quotes list by *Status*.

Click the **display icon** to view Quote details.

Agents may add or remove field from their dashboard by clicking on the **gear icon**. From here they can see additional element to the list by selecting the **show icon**.

Quote ID	Client Name	Products Quoted	Req. Eff. Date	Date Created	Quote Status	Agent Name	Action
7862		MAPD Dental	09/01/2024	08/12/2024	Application Submitted	Kylie Swanson	
7857		Medicare Advantage	01/01/2025	08/12/2024	Application Submitted	Kylie Swanson	
7421		MAPD Dental	09/01/2024	07/08/2024	Application In Progress	Lisa TestUser Miller TestUser	
7360		MAPD Dental	09/01/2024	07/06/2024	Application Submitted	Kylie Swanson	

Action

Edit Columns

You can add, remove and sort columns here.

- Quote ID
- Client Name
- Products Quoted Hide
- Req. Eff. Date Hide
- Date Created Hide
- Quote Status Hide
- Agent Name Hide
- Action

CANCEL
SAVE

Quote Details

It is possible to enroll the client in the plans included in this quote.

To enroll, the Agent clicks the **Select Plan** button for the desired plans. The *Enroll* button then becomes active.

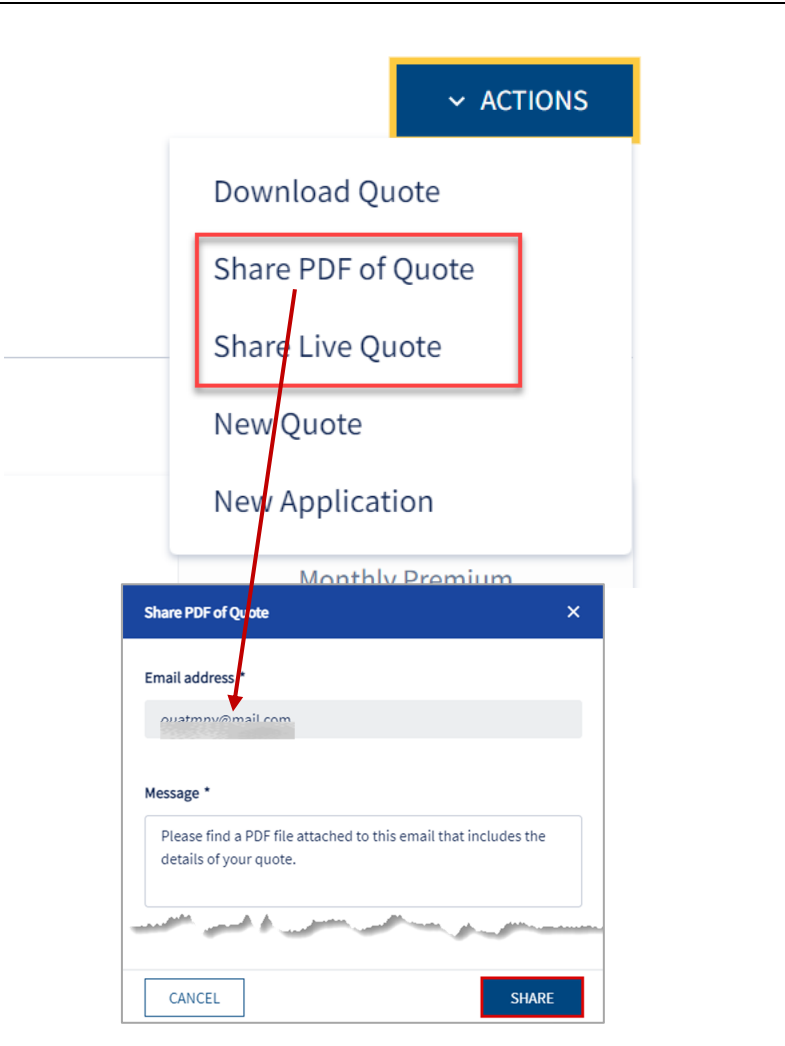
The Agent clicks **Enroll** to finish signing the client up for these plans.

Share Quote – PDF

An Agent may share a PDF of the Quote with a Client.

This can be done in two ways: via PDF or through Live Sharing. For Live Sharing, the client is then able to login and view/edit that quote.

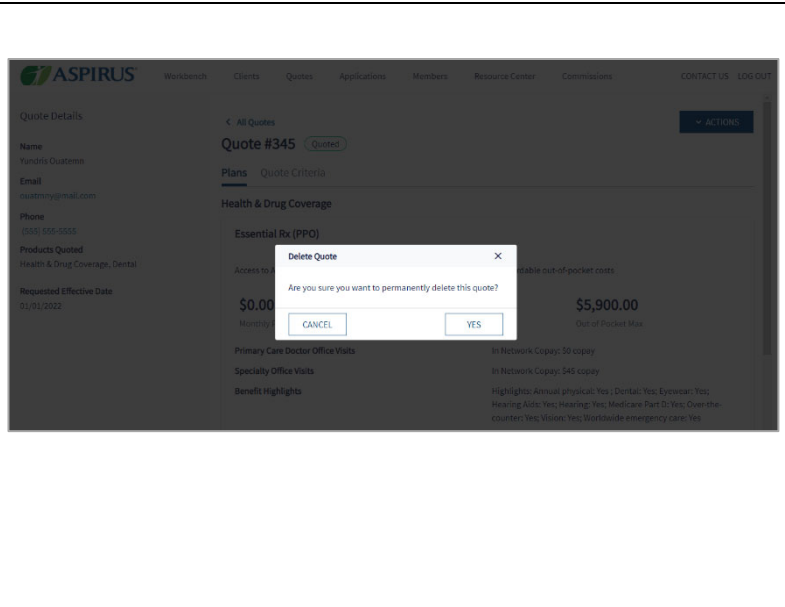
The Live Share details can be found in the the [Live Share User Guide](#).



Delete Quote Confirmation

When deleting a quote, the Agent will be asked to confirm they do, indeed wish to permanently delete a saved quote.

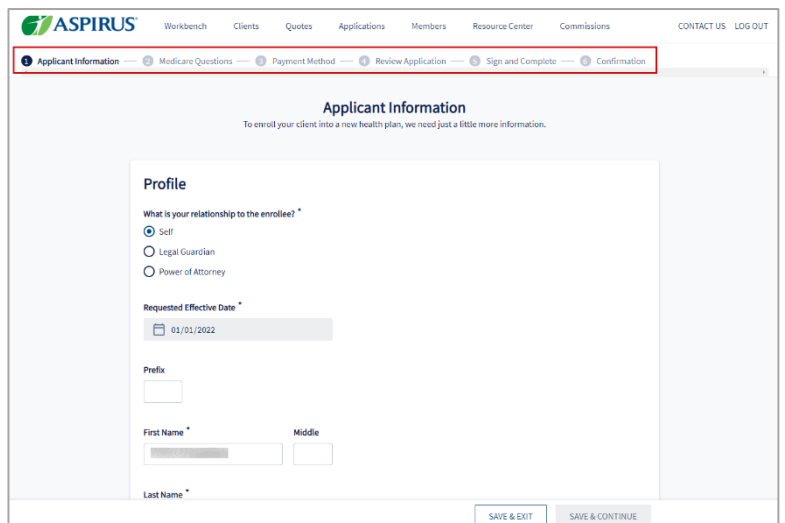
NOTE: Quotes can only be deleted when they are in an expired status.



Workflow Stepper

The workflow stepper tracks the steps of creating or completing the application from *Applicant Information* through *Confirmation*. The current step in the process displays in bold text.

The workflow stepper is situated above the main workspace / interface in a horizontal arrangement.



The screenshot displays the Aspirus Agent Portal interface. At the top, a navigation bar includes the Aspirus logo and menu items: Workbench, Clients, Quotes, Applications, Members, Resource Center, Commissions, CONTACT US, and LOG OUT. Below this is a horizontal workflow stepper with six steps: Applicant Information (bolded and highlighted with a red box), Medicare Questions, Payment Method, Review Application, Sign and Complete, and Confirmation. The main content area is titled "Applicant Information" with the subtext "To enroll your client into a new health plan, we need just a little more information." The form contains a "Profile" section with the question "What is your relationship to the enrollee? *". It has three radio button options: "Self" (selected), "Legal Guardian", and "Power of Attorney". Below this is a "Requested Effective Date *" field with a calendar icon and the date "01/01/2022". There is a "Prefix" field. The "First Name *" field is split into "First Name" and "Middle" sub-fields. The "Last Name *" field is at the bottom. At the bottom right of the form are two buttons: "SAVE & EXIT" and "SAVE & CONTINUE".

Medicare Applications

Create New Medicare Application

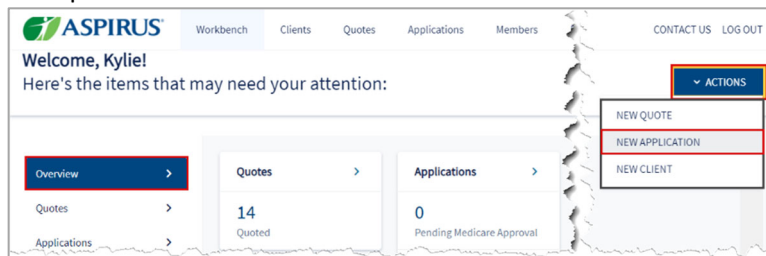
Start Applications (without Quote)

There are several ways to start an application, either associated to an existing Client, or not.

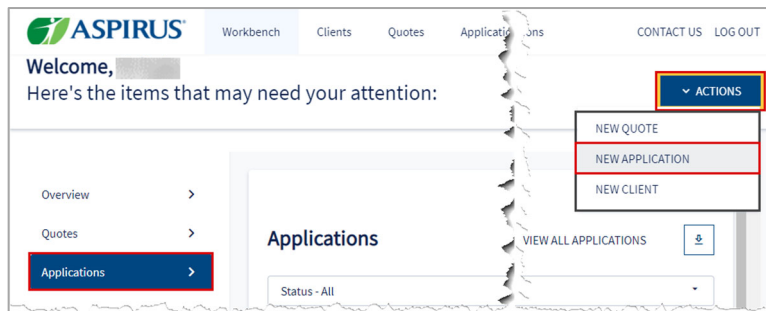
The examples that follow show initiating the application without an associated client or quote.

1. From the *Overview* page of the *Workbench*, click **Actions**, then choose **New Application**.
2. From the *Applications* page of the *Workbench*, click **Actions** then choose **New Application**.
3. From the *Applications* page, then click the **New Application button**.

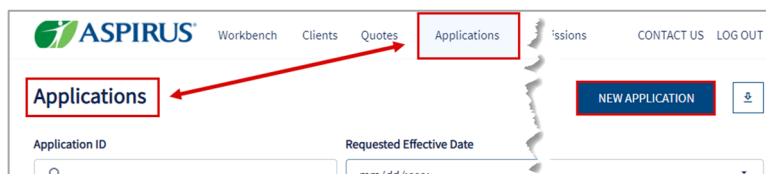
Example 1



Example 2



Example 3



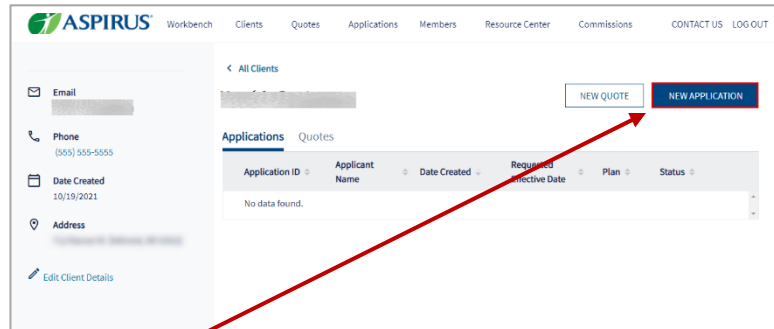
Application Initiation Alternatives

Although the above methods provide steps for starting an application without either an associated client or quote, an Agent can also complete an application from an existing client record, or by using a saved quote.

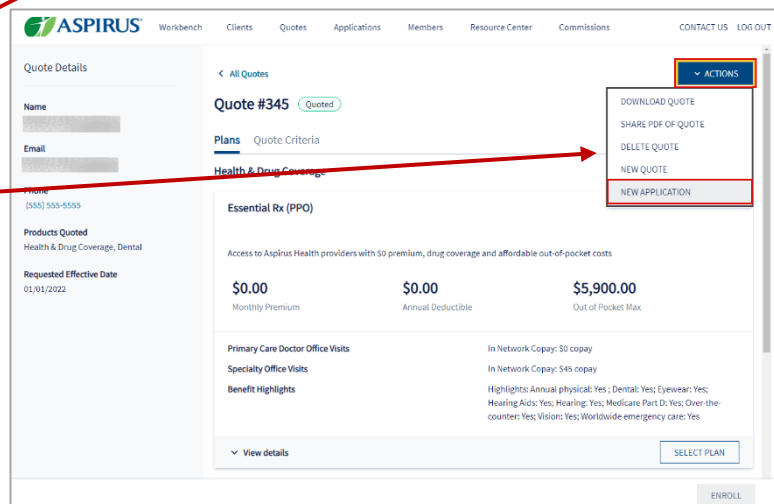
Below are the two alternative methods an Agent may use to initiate an application:

1. From the Client profile page, click **New Application**.
2. From the Quote itself click the **Actions** button, the select **New Application**.

From an existing Client record:

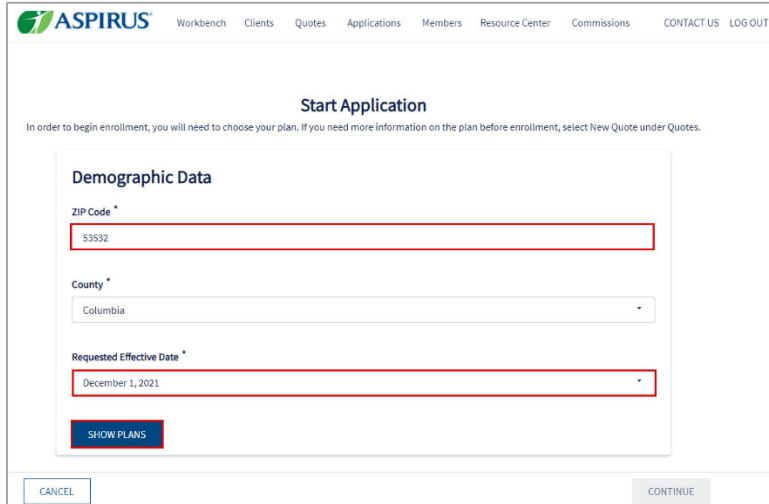


Using a Saved Quote:



On the *Start Application* page, enter **ZIP Code** and **Requested Effective Date** (*County* will fill in from the corresponding *ZIP Code*).

Click **Show Plans**.

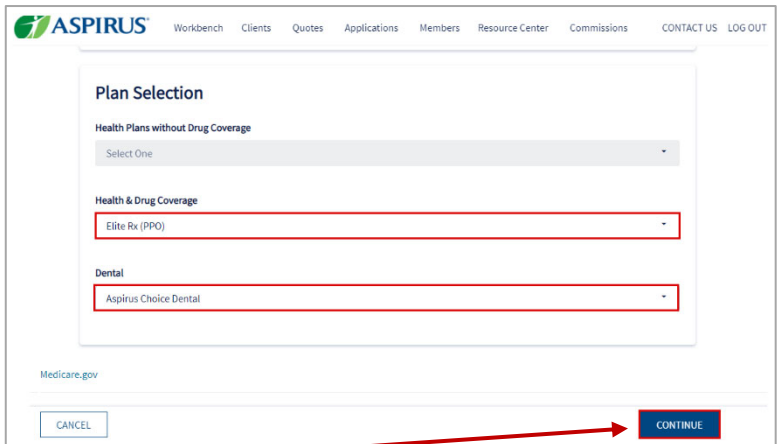


Two selection options display: Drop-down lists containing *Health Plans without Drug Coverage* and *Health & Drug Coverage* options allow the Agent to make a selection as to the type of plan to be included in this application.

In this example, **Elite RX (PPO)** is selected under *Health & Drug Coverage*.

Aspirus Choice Dental is the choice for *Dental*.

Click **Continue**.



You're Ready to Enroll

Select the button **Apply online** to activate the button to proceed:

Click the **Start Application** button.

The application can be saved for an existing client, or a new one.

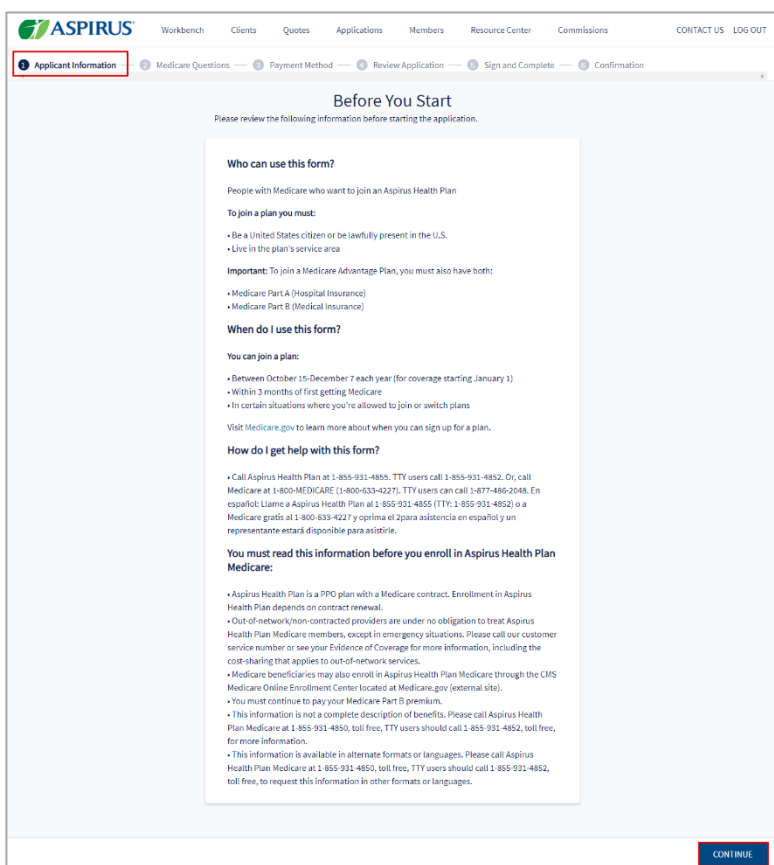
If completing for an existing client, select the *Existing* button and proceed to search for the client.

For a new client, click **New**.

Before You Start

The information on this page must be reviewed before starting the application.

It includes a section with the heading 'You must read this information before you enroll in Aspirus Health Plan Medicare:'



ASPIRUS Workbench Clients Quotes Applications Members Resource Center Commissions CONTACT US LOG OUT

1 Applicant Information 2 Medicare Questions 3 Payment Method 4 Review Application 5 Sign and Complete 6 Confirmation

Before You Start

Please review the following information before starting the application.

Who can use this form?

People with Medicare who want to join an Aspirus Health Plan

To join a plan you must:

- Be a United States citizen or be lawfully present in the U.S.
- Live in the plan's service area

Important: To join a Medicare Advantage Plan, you must also have both:

- Medicare Part A (Hospital Insurance)
- Medicare Part B (Medical Insurance)

When do I use this form?

You can join a plan:

- Between October 15-December 7 each year (for coverage starting January 1)
- Within 3 months of first getting Medicare
- In certain situations where you're allowed to join or switch plans

Visit [Medicare.gov](https://www.Medicare.gov) to learn more about when you can sign up for a plan.

How do I get help with this form?

- Call Aspirus Health Plan at 1-855-931-4855. TTY users call 1-855-931-4852. Or, call Medicare at 1-800-MEDICARE (1-800-633-4227). TTY users can call 1-877-486-2048. En español: Llame a Aspirus Health Plan al 1-855-931-4855 (TTY: 1-855-931-4852) o a Medicare gratis al 1-800-633-4227 y oprima el 2 para asistencia en español y un representante estará disponible para asistirle.

You must read this information before you enroll in Aspirus Health Plan Medicare:

- Aspirus Health Plan is a PPO plan with a Medicare contract. Enrollment in Aspirus Health Plan depends on contract renewal.
- Out-of-network/non-contracted providers are under no obligation to treat Aspirus Health Plan Medicare members, except in emergency situations. Please call our customer service number or see your Evidence of Coverage for more information, including the cost-sharing that applies to out-of-network services.
- Medicare beneficiaries may also enroll in Aspirus Health Plan Medicare through the CMS Medicare Online Enrollment Center located at [Medicare.gov](https://www.Medicare.gov) (external site).
- You must continue to pay your Medicare Part B premium.
- This information is not a complete description of benefits. Please call Aspirus Health Plan Medicare at 1-855-931-4850, toll free, TTY users should call 1-855-931-4852, toll free, for more information.
- This information is available in alternate formats or languages. Please call Aspirus Health Plan Medicare at 1-855-931-4850, toll free, TTY users should call 1-855-931-4852, toll free, to request this information in other formats or languages.

CONTINUE

You must read this information before you enroll in Aspirus Health Plan Medicare:

- Aspirus Health Plan is a PPO plan with a Medicare contract. Enrollment in Aspirus Health Plan depends on contract renewal.
- Out-of-network/non-contracted providers are under no obligation to treat Aspirus Health Plan Medicare members, except in emergency situations. Please call our customer service number or see your Evidence of Coverage for more information, including the cost-sharing that applies to out-of-network services.
- Medicare beneficiaries may also enroll in Aspirus Health Plan Medicare through the CMS Medicare Online Enrollment Center located at [Medicare.gov](https://www.Medicare.gov) (external site).
- You must continue to pay your Medicare Part B premium.
- This information is not a complete description of benefits. Please call Aspirus Health Plan Medicare at 1-855-931-4850, toll free, TTY users should call 1-855-931-4852, toll free, for more information.
- This information is available in alternate formats or languages. Please call Aspirus Health Plan Medicare at 1-855-931-4850, toll free, TTY users should call 1-855-931-4852, toll free, to request this information in other formats or languages.

Medicare Eligibility

Applicant Information

The first question on the *Applicant Information* page is, *What is your relationship to the enrollee?* The choices are:

- *Self*
- *Legal Guardian*
- *Power of Attorney*

Complete remaining required fields and click **Save & Continue**.

Important Questions

The questions on the *Medicare Questions* page help identify the types of care needed and clarifies eligibility status.

After answering the questions, including any sub-questions, click **Save & Continue**.

Primary Care Clinic Selection

Allows Agents to select a Primary Care clinic for the applicant during the application process. This step is optional. If the Agent would like to proceed, they click **Skip**.

The clinics options are populated based on the applicant's zip code and the plan selected.

Agents may search for a specific clinic by entering a clinic in *Search by Facility* field.

It is also possible to filter the clinic by:

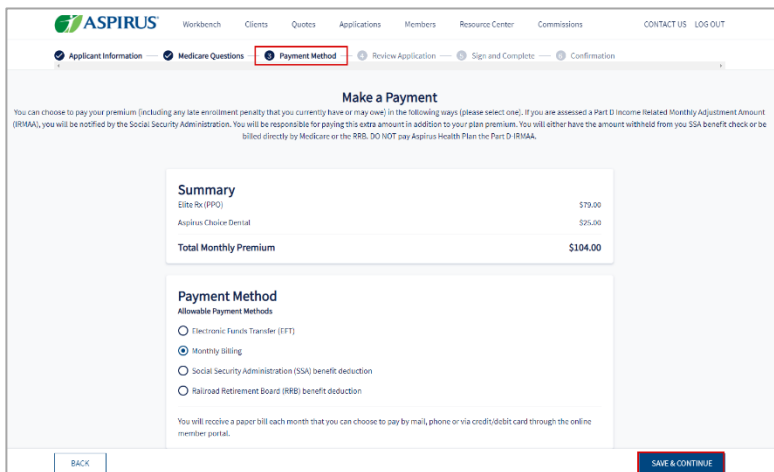
- *Specialties*
- *Language*
- *Facility Type*
- *Medical Group Affiliation*
- *Accommodations for persons with physical disabilities*
- *Accepting New.*

If the Agent is ready to proceed, they click **Select**. For the plan they've chosen *Select* now reads *Selected*. The Agent may now click **Save & Continue** to move to the next page.

The screenshot displays the 'Select a Primary Care Clinic' interface. At the top, there's a navigation bar with 'ASPIRUS HEALTH PLAN' and various menu items. Below it, a progress indicator shows 'Primary Care Clinic' as the current step. The main area is titled 'Select a Primary Care Clinic' and includes a search bar for 'Within 5 miles of' (zip code 53532) and a 'Search by Facility' field. On the left, a 'Filter Results' sidebar allows filtering by Specialties, Language, Facility Type, and Medical Group Affiliation. Three clinic options are listed, each with a 'SELECT' button. At the bottom, there are buttons for 'BACK', 'SKIP', 'SAVE & EXIT', and 'SAVE & CONTINUE'. A red box highlights the 'SKIP' button. A second screenshot shows the 'UW Health - Sun Prairie Clinic' with a 'SELECTED' status and 'SAVE & CONTINUE' button highlighted.

Payment Information

This feature requires Agents to indicate how the monthly premiums will be paid.



ASPIRUS Workbench Clients Quotes Applications Members Resource Center Commissions CONTACT US LOG OUT

Applicant Information Medicare Questions **Payment Method** Review Application Sign and Complete Confirmation

Make a Payment

You can choose to pay your premium (including any late enrollment penalty that you currently have or may owe) in the following ways (please select one). If you are assessed a Part D Income Related Monthly Adjustment Amount (IRMAA), you will be notified by the Social Security Administration. You will be responsible for paying this extra amount in addition to your plan premium. You will either have the amount withheld from your SSA benefit check or be billed directly by Medicare or the RRB. DO NOT pay Aspirus Health Plan the Part D IRMAA.

Summary	
Elite Rx (PPO)	\$79.00
Aspirus Choice-Dental	\$25.00
Total Monthly Premium	\$104.00

Payment Method

Allowable Payment Methods

- Electronic Funds Transfer (EFT)
- Monthly Billing
- Social Security Administration (SSA) benefit deduction
- Railroad Retirement Board (RRB) benefit deduction

You will receive a paper bill each month that you can choose to pay by mail, phone or via credit/debit card through the online member portal.

BACK SAVE & CONTINUE

Review Application

Review each section of the application carefully before saving it.

Sections include:

- *Plan Selection*
- *Applicant Information*
- *Medicare Questions*
- *Payment*

When satisfied, click the **Save & Continue** button.

ASPIRUS Workbench Clients Quotes Applications Members Resource Center Commissions CONTACT US LOG OUT

Applicant Information Medicare Questions Payment Method **Review Application** Sign and Complete Confirmation

Please Review Your Application

Plan Selection

Elite Rx (PPO)

Access to Aspirus Health providers, with comprehensive broad coverage, Part D, low out-of-pocket costs and an affordable premium

\$79.00	\$0.00	\$4,000.00
Monthly Premium	Annual Deductible	Out of Pocket Max

Primary Care Doctor Office Visits In Network Copay: \$0 copay
 Specialty Office Visits In Network Copay: \$40 copay
 Benefit Highlights Highlights: Annual physical: Yes

View details

Applicant Information

Profile

What is your relationship to the enrollee? Self
 Requested Effective Date 12/01/2021
 Prefix
 First Name
 Primary Phone Number (555) 555-5555
 Secondary Phone Number

Medicare Information

Medicare Number

Medicare Questions

Other than Medicare, will you continue to have any other medical coverage? No
 Will you have other prescription drug coverage? No
 Are you enrolled in a Medicare plan that is ending its Medicare contract or choosing to make a change during the MA Open Enrollment Period (Jan. 1 - March 31)? No

Payment

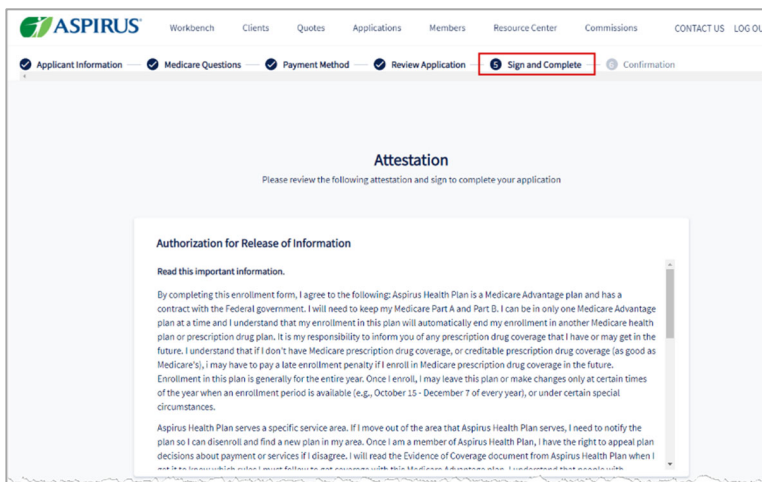
Summary

Elite Rx (PPO)	\$79.00
Aspirus Choice Dental	\$25.00
Total Monthly Premium	\$104.00

BACK SAVE & EXIT **SAVE & CONTINUE**

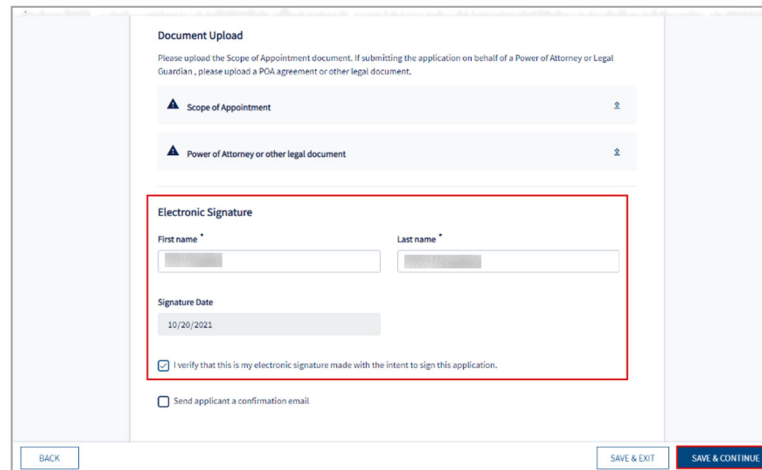
Authorization & Signature

The *Attestation* page includes verbiage the applicant must agree with to submit the enrollment form and sign and complete the application.



The *Electronic Signature* section is at the bottom of this page.

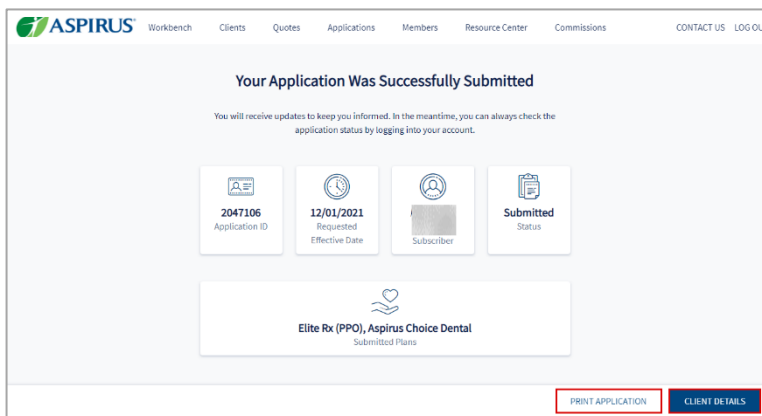
Enter *First Name* and *Last Name*, check the box to verify the electronic signature, then click **Save & Continue**.



Application Submission Confirmation

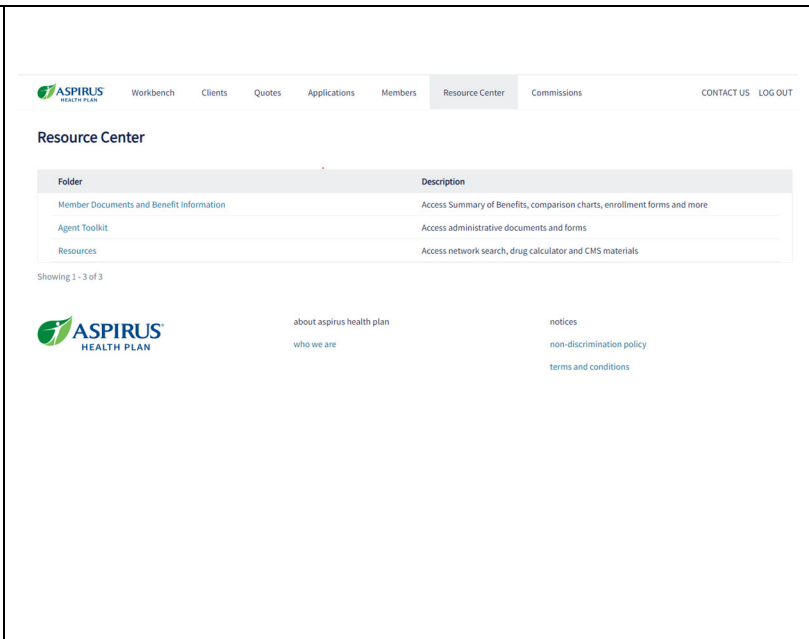
After submitting the application, a confirmation page displays.

You may *Print Application* or view *Client Details* by using either of the buttons at the bottom of the page.



Resource Center

Click the *Resource Center* link on the navigation bar at the top of the page to view folders filled with resources available to Agents for working with Aspirus.



The screenshot shows the Aspirus Agent Portal interface. At the top, there is a navigation bar with the Aspirus Health Plan logo on the left and several menu items: Workbench, Clients, Quotes, Applications, Members, Resource Center (which is highlighted), Commissions, CONTACT US, and LOG OUT. Below the navigation bar, the page title is "Resource Center". A table lists three folders:

Folder	Description
Member Documents and Benefit Information	Access Summary of Benefits, comparison charts, enrollment forms and more
Agent Toolkit	Access administrative documents and forms
Resources	Access network search, drug calculator and CMS materials

Below the table, it says "Showing 1 - 3 of 3". At the bottom of the page, there is another Aspirus Health Plan logo on the left and three links: "about aspirus health plan who we are", "notices", and "non-discrimination policy terms and conditions".

Members List

The Agent may view a list of *Members* and their associated policies.

It is possible to search the list of members by entering the *Member ID*, *Member Name*, or filtering on *Policy Status*.

It is also possible to export the list by clicking the **Export** button.

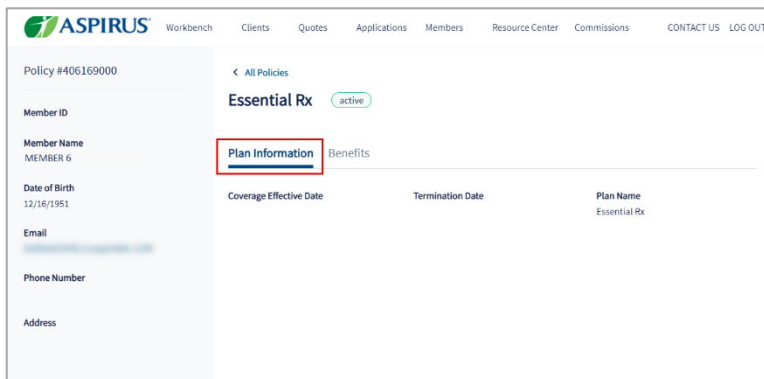
Click on the **Display icon** to open and view the Member record.

Agents may add or remove field from their dashboard by clicking on the **gear icon**. From here they can see additional element to the list by selecting the **show/hide icon**.

Member Details

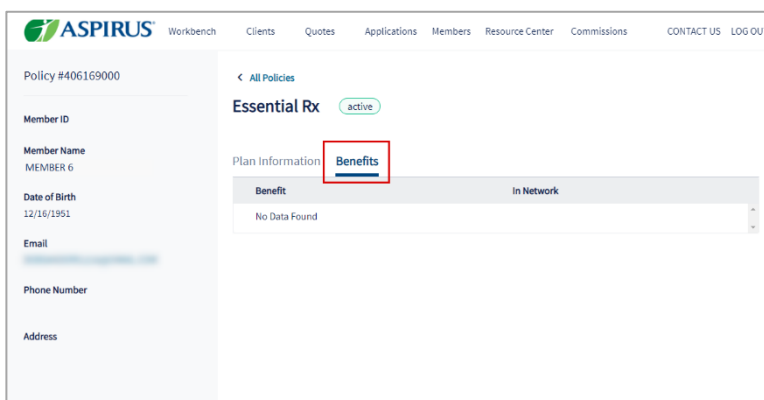
This feature allows the Agent to view the details of a specific policy.

Plan information:



The screenshot displays the Aspirus Agent Portal interface for Policy #406169000. On the left, a sidebar lists member details: Member ID, Member Name (MEMBER 6), Date of Birth (12/16/1951), Email, Phone Number, and Address. The main content area shows the plan name 'Essential Rx' with an 'active' status. Below this, a navigation bar highlights 'Plan Information' and 'Benefits'. The 'Plan Information' section contains a table with columns for 'Coverage Effective Date', 'Termination Date', and 'Plan Name' (Essential Rx).

Benefits information:

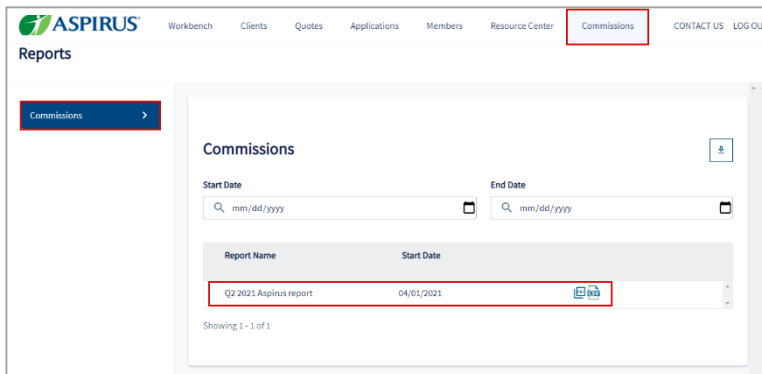


The screenshot displays the Aspirus Agent Portal interface for Policy #406169000, focusing on the 'Benefits' section. The left sidebar is identical to the previous screenshot. The main content area shows the plan name 'Essential Rx' with an 'active' status. Below this, a navigation bar highlights 'Benefits'. The 'Benefits' section contains a table with columns for 'Benefit' and 'In Network'. The table currently shows 'No Data Found'.

Commissions

The Commissions Report allows Agents to review a list of their commission statements and access their details.

Select the **PDF** icon to download a .pdf file format of the report or select the **CSV** icon to access a .csv file.



Session Inactivity

Agents will automatically be logged out of the Portal during an inactive session.

A warning that you are about to be logged out displays giving you a chance to extend the session or logout.

To remain in the system, click **Continue** and you will be able to keep working.

If you do nothing, you will be logged out after approximately 30 minutes of inactivity.

