

This document is for users of the Aspirus Health Plan Agent Portal. It is meant to explain the new Live Share features that was implemented.

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

2
3
3
4
5
6
7
7
8
9
10
10
11
11
12



### Share Live Quote

An Agent can share a Quote with a Client. The client is able to login and view that quote and take action in the Aspirus Health Plan Enrollment Portal.

To share a quote:

- Click on the **Quote ID** from the Quote list page. This will open the Quote Details page.
- Click on Actions
- Select Share Live Quote from the actions dropdown

The Share Live Quotes panel will appear with the client's email address populated. The Agent can choose to write an additional message or select **Share** to send the **Live Quote** email to the client's email address listed in their profile.

Email       Plans       Quote Criteria       Share D/of Quu         Email       Plans       Quote Criteria       Share D/or Quote         Phone       Essential Rx (PPO)       New Quote       New Quote         Requested Effective Date 03/02/2023       \$0.00       \$0.00       \$4,500.00         Monthly Premium       Annual Deductible       Out of Pocket Max         Physician Specialist Services       \$0.00y       \$4,500.00         Monthly Premium       Annual Deductible       Out of Pocket Max         Physician Specialist Services       \$0.00px       \$4,500.00         Worldwide Emergency Coverage       \$0.00px       Headed services and ground ambulance to the nearest app houghtal for emergency care, post stabilization, unproductible       Integrate of the nearest app houghtal for emergency care, post stabilization, unproductible	Quote Details	< ALL QUOTES				
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Share Live Quote         Email address •         Message •         Please review this quote.         Download Quote         Share PDF of Quote         Share Live Quote         Share Live Quote         New Quote         New Quote         New Quote         New Application		ta Manu dataila				SEL
ACTIONS      By clicking 'Share' you are agreeing to share this quote with you client. By clicking the link, your client will have the ability to withis quote from within their dashboard. Any applications submission. Please note that if your client has not previously or a login, they will be asked to do so prior to being able to view the quote.  New Application			mail address •	Share Live	e Quote	
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Share Live Quote – Client Experience		
	Hello	
Email	has shared a new	v health plan with you.
The client can now access the	Please review this quote.	
email in their inbox. Clients must click on the hyperlink. This will	By following the below link, you can view the sh note that you will need to created an account to	
open the Aspirus Health Plan enrollment account login page.	https://	
	Thank you, Aspirus Team	
	This is an electronically generated email message. P	lease do not reply.
	<b>ASPIRUS</b> HEALTH PLAN	Log in
	Medicare Plans Search Network Member Resources Provider Resources Ag	ent Resources Contact Us
	Sign in or Create an Account	Email
	to:	
	Save your favorite plans	Password
	Start or complete your application     Save your progress and return to it later	Remember me
	Save your progress and return to it later     Track the status of your submitted applications	Sign In
	See our Frequently Asked Questions for help signing up.	• <b>6 0 1</b>
	Are you a current Aspirus	Need help signing in?
	Health Plan member?	Don't have an account? Sign up
	Current members must also create an enrollment account to submit an online application. Your enrollment account is different than your member account. If you have a member account already, you can reuse your email address when you create an enrollment account.	



Create an Account	
If the client has an existing Aspirus Health Plan enrollment account under the email address listed in their profile, the client can <i>Sign In</i> with their existing account.	Email Password Remember me
If not, they will need to <b>select</b> <i>Sign up</i> and register an account using the email address where they received the quote.	Sign In Need help signing in?
	Don't have an account? Sign up
	Create Account
	Email *
	Password *
	First name *
	Last name *
	* indicates required field
	Register



#### Client View/Options

When the client logs in, they will be directed to the plan details page with the shared quote information.

Clients can take action on the quote or start an application from the quote.

If the client chooses to start an application from the quote they will need to click **Select Plan.** Then Enroll button will turn blue and can now click on the enroll button to start the application.

#### NOTE: If a client starts an

application from the shared quote, the Agent can track the application progress but cannot edit the application in the Agent Portal. If the client wants the Agent to complete the application after it has been started, the Agent will need to start a new application.

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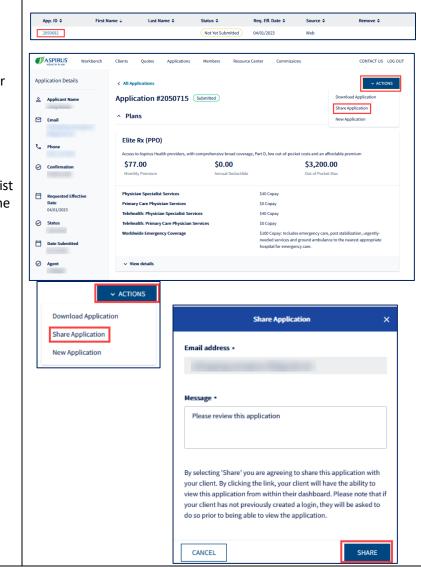
### Share Application

An Agent may share an Application with a client. The client can then log in to view or continue the application.

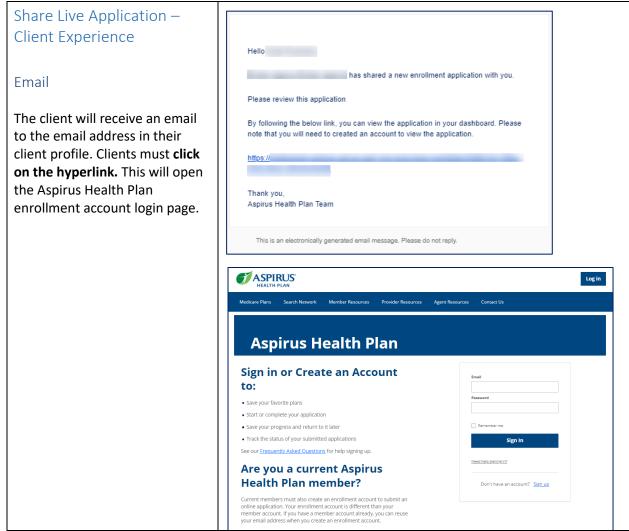
To share an application:

- Click on the App ID from the Application list page. This will open the Application Details page.
- Click Actions
- Select Share
   Application

A Share Application panel will appear with the client's email address populated. The Agent can choose to write an additional message or select **Share** to send the email to the client's email address listed in their profile.









Create Account	
If the client has an existing Aspirus Health Plan enrollment	Email
account under the email address listed in their profile, the client can <i>Sign In</i> with their existing	Password
account.	Remember me
If not, they will need to <b>select</b> <i>Sign up</i> and register an account	Sign In
using the email address where they received the enrollment application.	Need help signing in?
	Don't have an account? Sign up
	Create Account
	Create Account
	Email *
	Email *
	Email *  Password *  First name *
	Email *  Password *  First name *  Last name *



#### Client View/Options

After logging in, the shared application will display.

The client has a choice of actions. They can continue the Application or start a new Application.

The enrollment application process in the enrollment portal follows the same flow as in the Agent Portal.

**NOTE:** Once the client logs into the account to see the shared application the Agent can track the progress but will not be able to make any changes. If the client wants the Agent to complete the application after it has been shared, the Agent will need to start a new application.

Applicant Name	< All Applications Application #2050716	Not Yet Submitted		Continue Application New Application
Email	A Plans			
Phone	Elite Rx (PPO)			
Confirmation	Access to Aspirus Health providers, wit	h comprehensive broad coverage, \$0.00	Part D, low out-of-pocket costs and an affor \$3,200.00	
	Monthly Premium	Annual Deductible	Out of Pocket M	
Requested Effective Date	Physician Specialist Services		\$40 Copay	
03/01/2023	Primary Care Physician Services		\$0 Copay	
Status Not Yet Submitted	Telehealth: Physician Specialist Service	15	\$40 Copay	
	Telehealth: Primary Care Physician Ser	vices	\$0 Copay	
Date Submitted	Worldwide Emergency Coverage		\$100 Copay: Includes emergency care, po needed services and ground ambulance hospital for emergency care.	
Agent	✓ View details			



## Action and Status

#### Share Live Quote – Action and Status

When a	The status the Agent will see is	The actions a Agent can take are	The status the client will see is	The actions a client can take are
Quote is created by Agent	Quoted	Download Quote Share PDF of Quote Share Live Quote New Quote New Application	N/A	N/A
Quote is shared by Agent	Quoted	Download Quote Share PDF of Quote Share Live Quote New Quote New Application	N/A	N/A
Client logs in to view the shared quote.	Quoted	Download Quote Share PDF of Quote Share Live Quote New Quote New Application	Saved	Download New Application Shop for Plan
Client saves the application created from a shared quote	Quote Status: Applied Application Status: Not Yet Submitted	Share Application New Application	Quote Status: Applied Application Status: Not Yet Submitted	Continue Application New Application
Client submits application created from a shared quote	Quote Status: Applied Applications Status: Submitted	Download Application Share Application New Application	Quote Status: Applied Application Status: Submitted	Download Application New Application



Quote Statuses	Quote Status	Definition
	Quoted	The quote has been successfully saved.
Status terms that track the lifecycle of a quote	Expired	The quote has expired. A quote will expire on the requested effective date if no application has been submitted.
	Applied	The user has selected plans and initiated an application.

#### Share Live Application – Action and Status

When a	The status	The actions a Agent	The status	The actions a client
	the Agent	can take are	the client	can take are
	will see is		will see is	
Application is	Not Yet	Save & Exit	N/A	N/A
started by Agent	Submitted	Save & Continue		
Application is saved	Not Yet	Continue Application	N/A	N/A
by Agent	Submitted	Share Application		
		New Application		
Application is	Not Yet	Continue Application	N/A	N/A
shared by Agent	Submitted	Share Application		
		New Application		
Client logs in to	Not Yet	Share Application	Not Yet	Continue Application
view or start the	Submitted	New Application	Submitted	New Application
shared application				
Client saves the	Not Yet	Share Application	Not Yet	Continue Application
shared application	Submitted	New Application	Submitted	New Application
Client submits the	Submitted	Download Application	Submitted	Download Application
shared application		Share Application		New Application
		New Application		

**Note:** After the application has been submitted, the Agent and client will be able to track the status on their respective Agent and enrollment portals.



Application Statuses	STATUS	DEFINITION
Status terms that track	Not Yet Submitted	The application was started but has not been submitted.
the lifecycle of an	Submitted	The application was submitted. This status will display for up to two hours, then change to "In Progress".
application	In Progress	The application has been submitted and is being processed.
	Pending Medicare Approval	The application has been sent to Medicare for review.
	On Hold – Applicant Outreach	The application is being processed but it is incomplete and requires additional information. We will reach out to the applicant for additional details
	Rejected	The application was rejected because one or more required documents were not received, or CMS rejected the application due to other reasons.
	Cancelled	The application was cancelled by request.
	Denied	The application was denied due to non-receipt of required information.
	Enrolled	The application has been approved by CMS.