

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.

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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.

Quote ID	Client Name	Products Quoted	Requested Effective Date	Date Created	Quote Status	Remove
1893	[Redacted]	MAPD Dental	03/01/2023	02/09/2023	Quoted	

Quote Details

Client Name: [Redacted]

Email: [Redacted]

Phone: [Redacted]

Requested Effective Date: 03/01/2023

Quote #1893 (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

Monthly Premium	\$0.00	Annual Deductible	\$0.00	Out of Pocket Max	\$4,500.00
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Physician Specialist Services: \$40 Copay

Primary Care Physician Services: \$0 Copay

Telehealth: Physician Specialist Services: \$40 Copay

Telehealth: Primary Care Physician Services: \$0 Copay

Worldwide Emergency Coverage: \$100 Copay; Includes emergency care, post stabilization, urgently-needed services and ground ambulance to the nearest appropriate hospital for emergency care.

Actions: Download Quote, Share PDF of Quote, **Share Live Quote**, New Quote, New Application

View details | SELECT PLAN

Actions

Download Quote

Share PDF of Quote

Share Live Quote

New Quote

New Application

Share Live Quote

Email address: [Redacted]

Message: Please review this quote.

By clicking 'Share' you are agreeing to share this quote with your client. By clicking the link, your client will have the ability to view this quote from within their dashboard. Any applications submitted from the quote will retain credit as you, the agent, for this submission. Please note that if your client has not previously created a login, they will be asked to do so prior to being able to view the quote.

CANCEL | **SHARE**

Share Live Quote – Client Experience

Email

The client can now access the email in their inbox. Clients must **click on the hyperlink**. This will open the Aspirus Health Plan enrollment account login page.

Hello [redacted]

[redacted] has shared a new health plan with you.

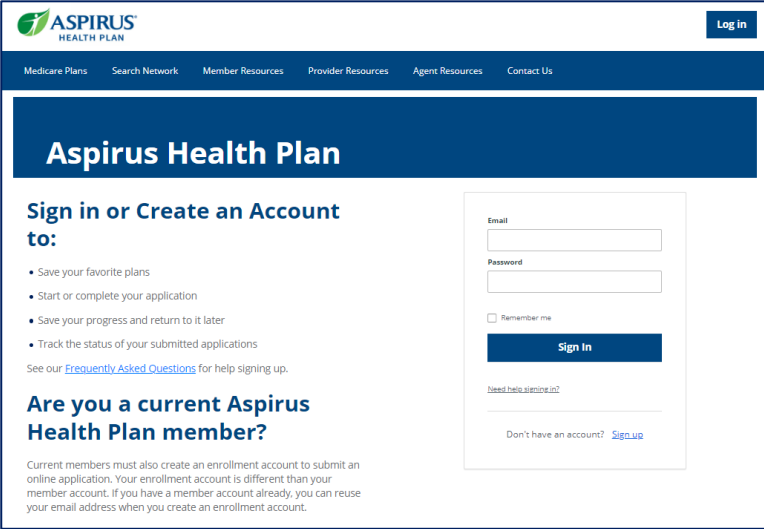
Please review this quote.

By following the below link, you can view the shared plan in your dashboard. Please note that you will need to created an account to view the plan.

[https://\[redacted\]](https://[redacted])

Thank you,
Aspirus Team

This is an electronically generated email message. Please do not reply.

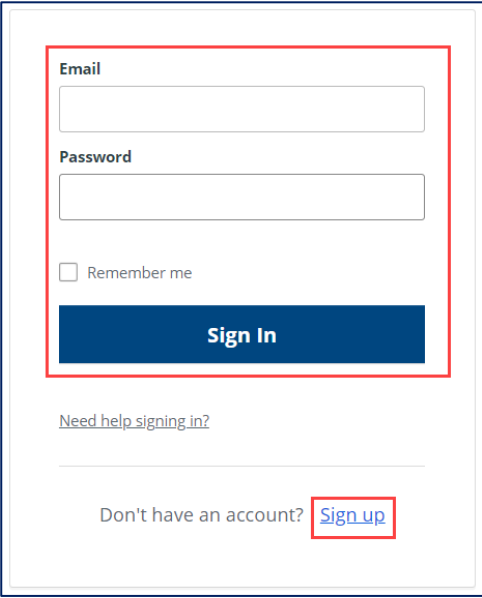


The screenshot shows the Aspirus Health Plan website. At the top left is the Aspirus Health Plan logo. At the top right is a "Log in" button. Below the logo is a navigation menu with links for Medicare Plans, Search Network, Member Resources, Provider Resources, Agent Resources, and Contact Us. The main heading is "Aspirus Health Plan". Below this is the section "Sign in or Create an Account to:" followed by a list of bullet points: "Save your favorite plans", "Start or complete your application", "Save your progress and return to it later", and "Track the status of your submitted applications". Below the list is a link to "Frequently Asked Questions". To the right of the text is a login form with fields for "Email" and "Password", a "Remember me" checkbox, and a "Sign In" button. Below the form is a link "Need help signing in?". At the bottom of the form area is a link "Don't have an account? Sign up". Below the form area is a paragraph: "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

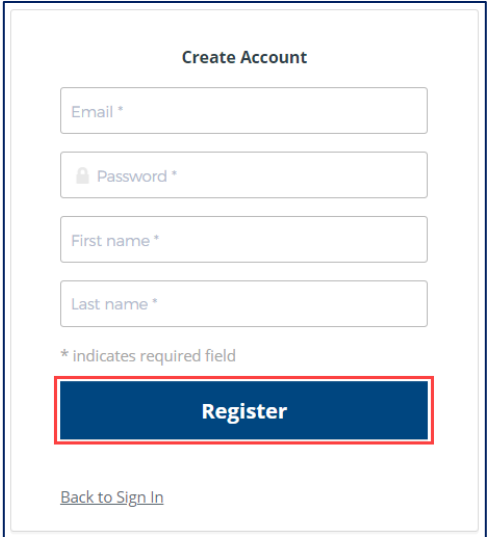
If the client has an existing Aspirus Health Plan enrollment account under the email address listed in their profile, the client can *Sign In* with their existing account.

If not, they will need to **select *Sign up*** and register an account using the email address where they received the quote.



The Sign In form is enclosed in a red border. It contains the following elements:

- Email** label above a text input field.
- Password** label above a text input field.
- Remember me checkbox.
- Sign In** button.
- [Need help signing in?](#) link.
- Don't have an account? [Sign up](#) link.



The Create Account form is enclosed in a red border. It contains the following elements:

- Create Account** title.
- Email *** label above a text input field.
- Password *** label above a text input field.
- First name *** label above a text input field.
- Last name *** label above a text input field.
- * indicates required field.
- Register** button.
- [Back to Sign In](#) link.

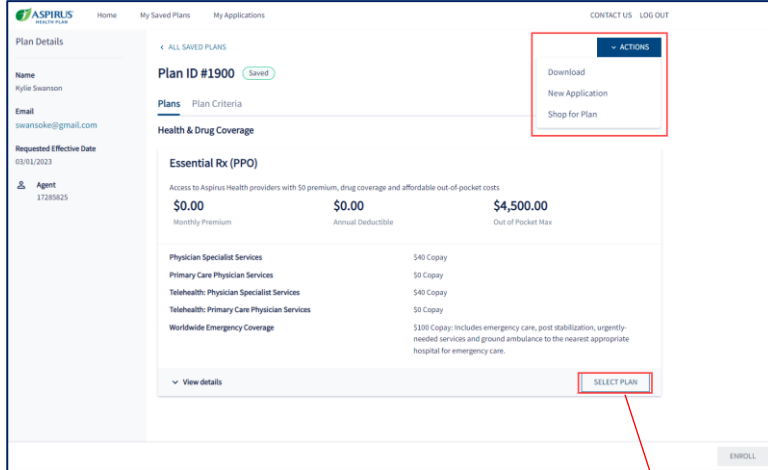
Client View/Options

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.



Plan Details

Plan ID #1900 Save

Health & Drug Coverage

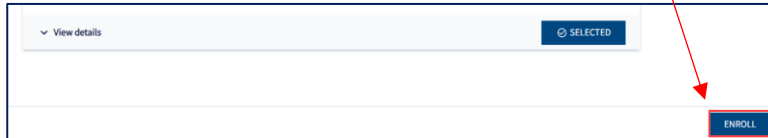
Essential Rx (PPO)

Access to Aspirus Health providers with 50 premium, drug coverage and affordable out-of-pocket costs

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

Physician Specialist Services: \$40 Copay
Primary Care Physician Services: \$0 Copay
Telehealth: Physician Specialist Services: \$40 Copay
Telehealth: Primary Care Physician Services: \$0 Copay
Worldwide Emergency Coverage: \$100 Copay; Includes emergency care, post stabilization, urgently needed services and ground ambulance to the nearest appropriate hospital for emergency care.

SELECT PLAN



ENROLL

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**

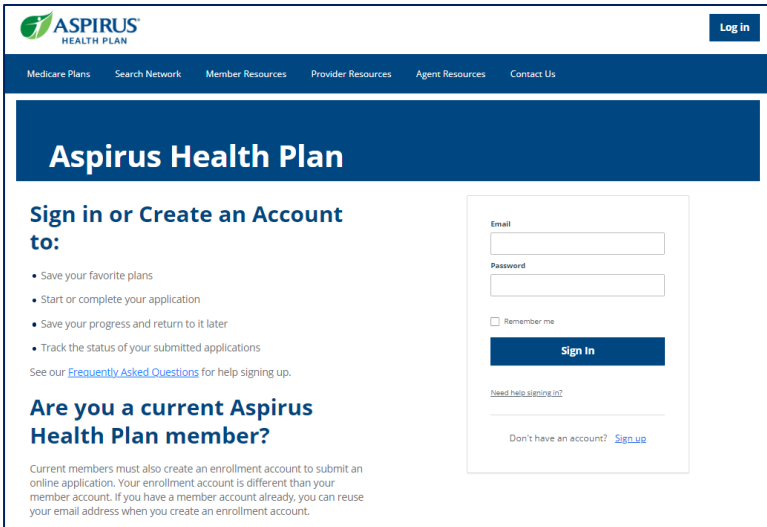
A Share Application panel will appear with the client's email address populated. The Agent can choose to write an additional message or select **Share** to send the email to the client's email address listed in their profile.

The screenshot displays the Aspirus Agent Portal interface. At the top, there is a table with columns: App. ID, First Name, Last Name, Status, Req. Eff. Date, Source, and Remove. The first row shows App. ID 205092, Status Not Yet Submitted, and Req. Eff. Date 04/01/2023. Below this is the 'Application Details' page for Application #2050715, which is in a 'Submitted' state. The page shows details for the 'Elite Rx (PPO)' plan, including a monthly premium of \$77.00, an annual deductible of \$0.00, and an out-of-pocket maximum of \$3,200.00. A table lists various services and their copay amounts: Physician Specialist Services (\$40), Primary Care Physician Services (\$0), Telehealth: Physician Specialist Services (\$40), Telehealth: Primary Care Physician Services (\$0), and Worldwide Emergency Coverage (\$100). An 'ACTIONS' dropdown menu is visible, with 'Share Application' highlighted. Below this, a 'Share Application' modal is shown, containing a pre-filled email address, a message field with the text 'Please review this application', and 'CANCEL' and 'SHARE' buttons.

Share Live Application – Client Experience

Email

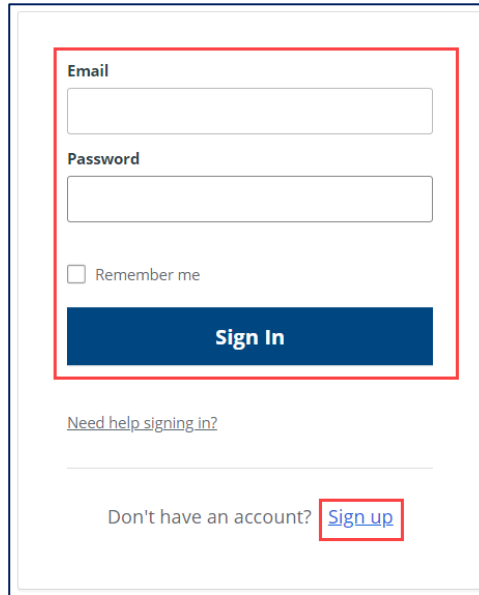
The client will receive an email to the email address in their client profile. Clients must **click on the hyperlink**. This will open the Aspirus Health Plan enrollment account login page.



Create Account

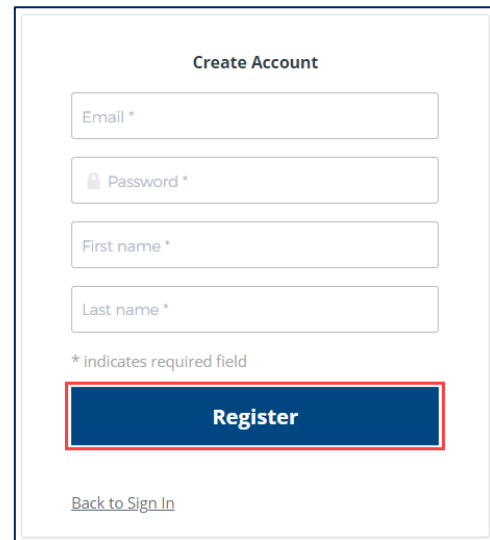
If the client has an existing Aspirus Health Plan enrollment account under the email address listed in their profile, the client can *Sign In* with their existing account.

If not, they will need to **select *Sign up*** and register an account using the email address where they received the enrollment application.



The Sign In form is enclosed in a red border. It contains the following elements:

- Email**: A text input field.
- Password**: A text input field.
- Remember me
- Sign In**: A blue button.
- [Need help signing in?](#): A link below the password field.
- Don't have an account? [Sign up](#): A link at the bottom of the form.



The Create Account form is enclosed in a red border. It contains the following elements:

- Create Account**: The title of the form.
- Email ***: A text input field.
- Password ***: A text input field with a lock icon.
- First name ***: A text input field.
- Last name ***: A text input field.
- * indicates required field
- Register**: A blue button.
- [Back to Sign In](#): A link at the bottom of the form.

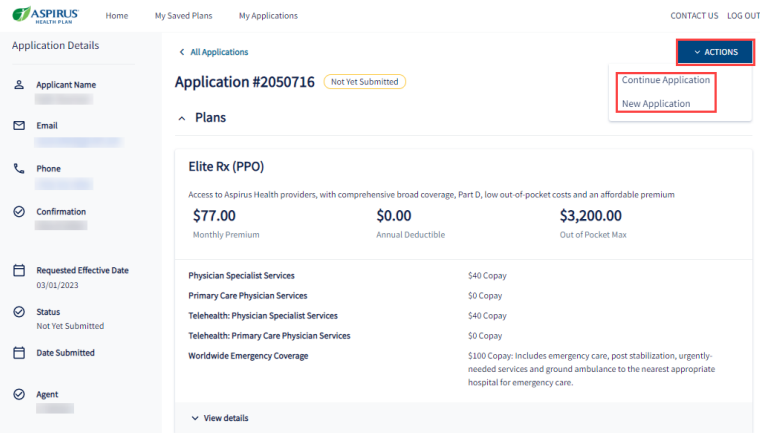
Client View/Options

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.



The screenshot displays the Aspirus Agent Portal interface. At the top, there are navigation links for Home, My Saved Plans, and My Applications, along with CONTACT US and LOG OUT options. The main content area shows 'Application Details' for 'Application #2050716' with a 'Not Yet Submitted' status. A sidebar on the left lists application details such as Applicant Name, Email, Phone, Confirmation, Requested Effective Date (03/01/2023), Status (Not Yet Submitted), Date Submitted, and Agent. The main content area includes an 'ACTIONS' menu with 'Continue Application' and 'New Application' options. Below this, the 'Elite Rx (PPO)' plan is detailed, showing access to Aspirus Health providers, comprehensive broad coverage, Part D, low out-of-pocket costs, and an affordable premium. A table lists the plan's financial details: Monthly Premium of \$77.00, Annual Deductible of \$0.00, and Out of Pocket Max of \$3,200.00. A table of services and copays is also provided:

Service	Copay
Physician Specialist Services	\$40 Copay
Primary Care Physician Services	\$0 Copay
Telehealth: Physician Specialist Services	\$40 Copay
Telehealth: Primary Care Physician Services	\$0 Copay
Worldwide Emergency Coverage	\$100 Copay: Includes emergency care, post stabilization, urgently-needed services and ground ambulance to the nearest appropriate hospital for emergency care.

Action and Status

Share Live Quote – Action and Status

<i>When a...</i>	<i>The status the Agent will see is...</i>	<i>The actions a Agent can take are...</i>	<i>The status the client will see is...</i>	<i>The actions a client can take are...</i>
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

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.

Quote Statuses

Status terms that track the lifecycle of a quote

Quote Status	Definition
Quoted	The quote has been successfully saved.
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

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

STATUS	DEFINITION
Not Yet Submitted	The application was started but has not been submitted.
Submitted	The application was submitted. This status will display for up to two hours, then change to "In Progress".
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.