

Shared Client Details Instructions

We have identified an issue when trying to submit an application on the broker portal for 2 people who share an email address and/or phone number (e.g., husband and wife). The page will say “there was an error processing your request” and below that it will also say “email field must be unique” and/or “phone number field must be unique.”

We have created a work around for this scenario, but please be aware that **this will only work if the two applicants live in the same zip code and county.**

1. Under the “clients” tab in the broker portal you will need to create a client profile under one person (e.g., the wife).
2. Start an application from that profile and complete it as usual.
3. After submitting the first application, start another application from the same profile.
 - a. Once you are in the application, you can change the information in the boxes to match the second applicant’s (e.g., the husband’s).
 - i. **The only information that cannot be changed is zip code and county.**

Please see below for the same process, but with screenshots:

Under the “clients” tab in the broker portal, create a client profile for one of the applicants.

The screenshot shows the Aspirus Health Plan broker portal interface. The top navigation bar includes the Aspirus Health Plan logo and menu items: Workbench, Clients, Quotes, Applications, Members, Resource Center, Commissions, CONTACT US, and LOG OUT. The main content area displays a client profile for "Spouse Test". On the left, there is a sidebar with fields for Email, Phone, Date Created (10/23/2023), and Address, along with an "Edit Client Details" link. The main profile area shows a "Spouse Test" header with "NEW QUOTE" and "NEW APPLICATION" buttons. Below this, there are tabs for "Applications" and "Quotes". The "Applications" tab is active, showing a table with columns: Application ID, First Name, Plan, Status, Date Created, and Action. The table currently contains the text "No data found."

Under client profile, select “new application”, then start and submit the application for the applicant the client profile was created under.

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

< All Clients

Spouse Test [NEW QUOTE] [NEW APPLICATION]

Applications | Quotes

Application ID	First Name	Plan	Status	Date Created	Action
2055517	Spouse	Essential Rx (PPO)	Submitted	10/23/2023	[Icon]

Showing 1 - 1 of 1

Left sidebar: Email, Phone, Date Created (10/23/2023), Address, Edit Client Details

Then under the same client profile, select “new application” again, then during the application you can change all the details (except zip code and county).

Application one under the client with client details prepopulated:

ASPIRUS HEALTH PLAN | Workbench | Clients | Quotes | Applications | Members | Resource Center | Commissions

1 Applicant Information | 2 Medicare Questions | 3 Primary Care Clinic | 4 Payment Method | 5 Review Application | 6 Sign and Complete

Profile

What is your relationship to the enrollee? *

Self
 Legal Guardian
 Power of Attorney

Requested Effective Date *

01 / 01 / 2024 [Calendar Icon]

Prefix

[Text Field]

First Name * **Middle**

Spouse [Text Field]

Last Name *

Test [Text Field]

Date of Birth * **Age**

mm / dd / yyyy [Calendar Icon] [Text Field]

Gender *

Male [Text Field] Female [Text Field]

Application 2 under the client where we edited the prepopulated values to the 2nd applicant's information:

ASPIRUS HEALTH PLAN | Workbench | Clients | Quotes | Applications | Members | Resource Center | Commissions

1 Applicant Information | 2 Medicare Questions | 3 Primary Care Clinic | 4 Payment Method | 5 Review Application

Profile

What is your relationship to the enrollee? *

Self
 Legal Guardian
 Power of Attorney

Requested Effective Date *

01 / 01 / 2024

Prefix

First Name * | **Middle**

Spouse - Wife |

Last Name *

Test

Date of Birth * | **Age**

mm / dd / yyyy |

Gender *

How the applications will display under the client profile:

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

< All Clients

Spouse Test

Applications | Quotes

Application ID	First Name	Plan	Status	Date Created	Action
2055519	Spouse - Wife	Essential Rx (PPO)	Submitted	10/23/2023	
2055517	Spouse	Essential Rx (PPO)	Submitted	10/23/2023	

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[Edit Client Details](#)