

# Miramar:Agent Plan Administrator User Guide

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Rev. 7/2024

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## INTRODUCTION

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*This document is housed on the Miramar:Agent Knowledge Base for Administrators (<https://miramar-agent.com/KnowledgeBase/Article?kb=6>).*

Miramar:Agent is a web-based, multi-tenant software solution helping agents complete all steps so they are ready to sell Medicare, Exchange, and other health plans managed in the system. Miramar:Agent assists agents and organizations in the facilitation of their Program training and overall organization. Miramar:Agent assists agents in keeping track of their Agent Appointments, relevant documentation, group affiliations and eligible licenses for programs carried out within the platform. Miramar agent also helps agent stay informed about their Ready to Sell status with organizations that present this information within the platform as well as communicate within their organizations with our messaging feature. Miramar:Agent consists of two modules: *Agent Onboarding* and *Agent Oversight*.

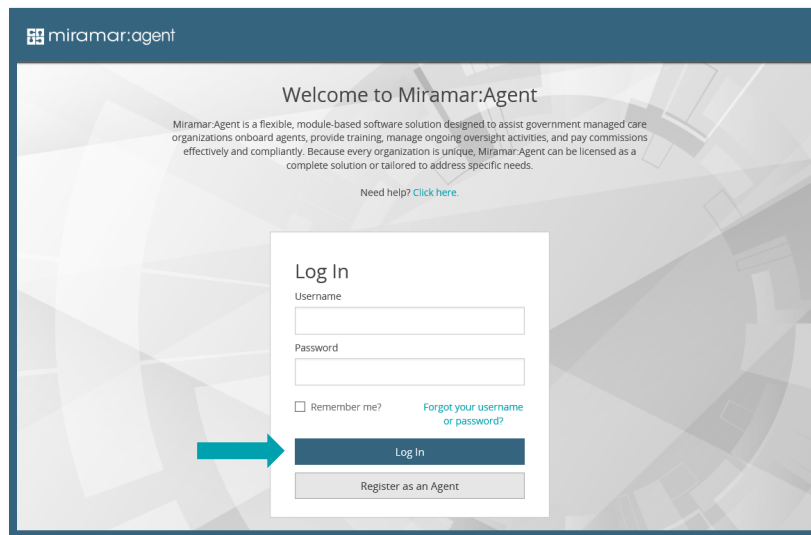
Information in this User Guide covers all functions and features of Miramar:Agent. Your available features and services may vary.

## GETTING STARTED

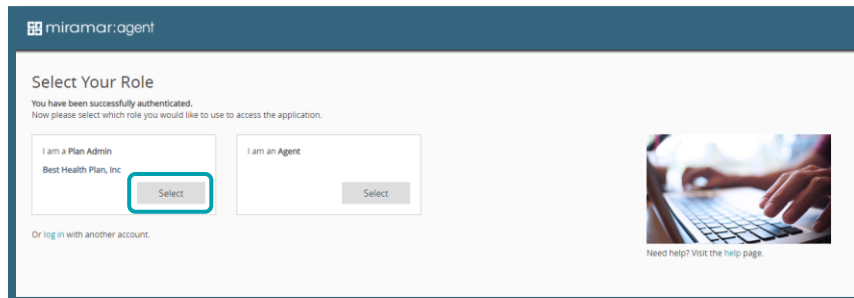
If you previously registered for an account as an agent and are a first-time administrator user, or if this is your first time accessing the system and you don't already have an account, contact your internal Miramar:Agent project manager to request plan administrator access.

## ACCESSING THE SYSTEM

As a Miramar:Agent user, you will only ever need one set of login credentials from which you can access all roles and/or plans you have been granted access to in the system. To log in to your account, go to [www.miramar-agent.com](http://www.miramar-agent.com) and enter your username and password on the main landing screen. Click **Log In**.

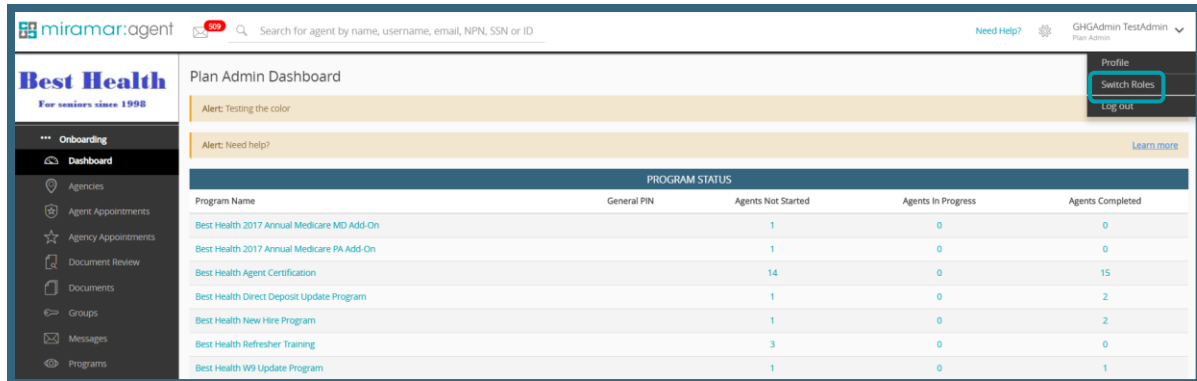


If you have both a plan administrator and an agent account, or you are a plan administrator for multiple plans, upon logging in, you will be asked to select which role you would like to use to access the system. Click **Select** next to the role you'd like to use.



## How do I switch roles?

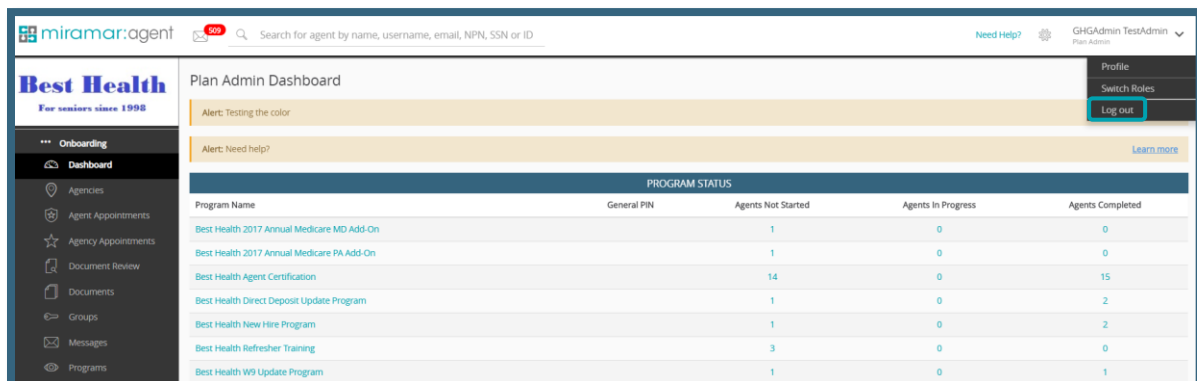
Once logged in, you can easily switch roles without having to log out and log back in. When you're ready to switch roles, move your cursor to the upper right corner of your screen and click the down arrow that appears to the right of your name. A drop-down menu will be displayed. Select **Switch Roles**.



The screenshot shows the 'miramar:agent' Plan Admin Dashboard. In the top right corner, the user 'GHGAdmin TestAdmin' is logged in. A dropdown menu is open, showing options: 'Profile', 'Switch Roles' (highlighted with a red box), and 'Log out'.

Program Name	General PIN	Agents Not Started	Agents In Progress	Agents Completed
Best Health 2017 Annual Medicare MD Add-On		1	0	0
Best Health 2017 Annual Medicare PA Add-On		1	0	0
Best Health Agent Certification		14	0	15
Best Health Direct Deposit Update Program		1	0	2
Best Health New Hire Program		1	0	2
Best Health Refresher Training		3	0	0
Best Health W9 Update Program		1	0	1

To log out of your account, place the cursor on your name in the upper right corner of the screen and click the down arrow to the right. Select **Log out** from the drop-down menu.



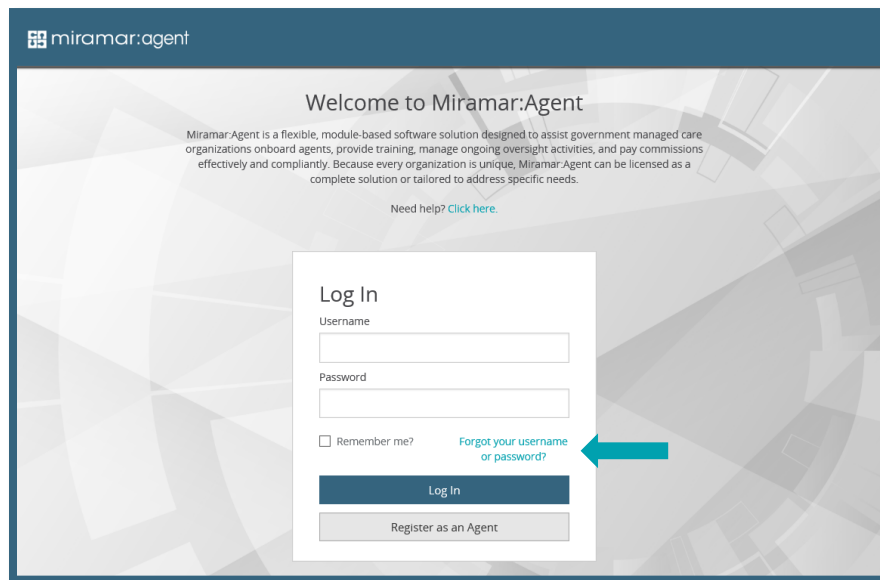
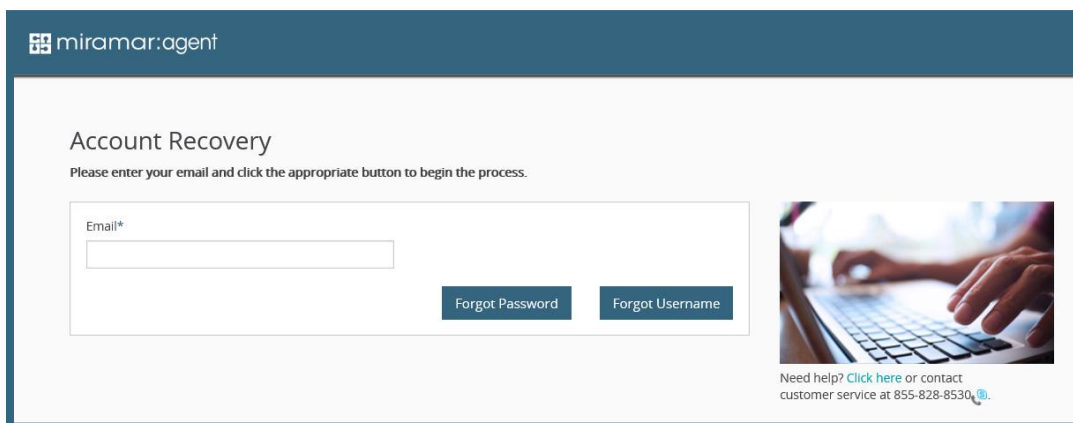
The screenshot shows the 'miramar:agent' Plan Admin Dashboard. In the top right corner, the user 'GHGAdmin TestAdmin' is logged in. A dropdown menu is open, showing options: 'Profile', 'Switch Roles', and 'Log out' (highlighted with a red box).

Program Name	General PIN	Agents Not Started	Agents In Progress	Agents Completed
Best Health 2017 Annual Medicare MD Add-On		1	0	0
Best Health 2017 Annual Medicare PA Add-On		1	0	0
Best Health Agent Certification		14	0	15
Best Health Direct Deposit Update Program		1	0	2
Best Health New Hire Program		1	0	2
Best Health Refresher Training		3	0	0
Best Health W9 Update Program		1	0	1

### How do I retrieve my username or password?

If you've forgotten your username or password, you can retrieve them directly to your email after completing the one-time email verification process. If you have not yet verified your email address, continue to follow the instructions on the next page.

Click on **Forgot your username or password?** and enter your email address when prompted. Click **Forgot Password** or **Forgot Username**, depending on which you need to recover.

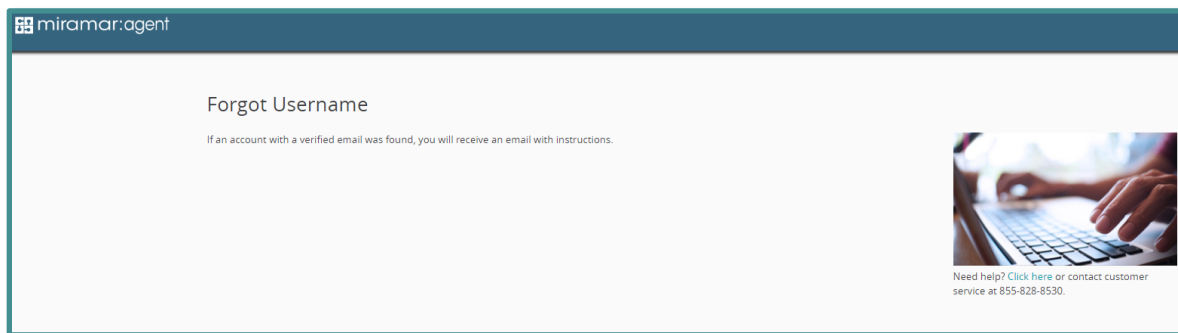

**IMPORTANT:** If you have already verified your email address, you will receive an email with instructions for retrieving your password or username. Otherwise, follow the instructions as prompted. If you have forgotten your password, you will need to know your username in order to retrieve it.



**QUICK TIP:** If you have not yet verified your email address, you will need to contact the Helpdesk to answer additional questions to verify your identity and update your password. To contact the Helpdesk, create a ticket by clicking [here](#) or call using the plan-specific phone number provided by your plan representative.

#### *Forgot Password or Username*

Enter your Email at the Account Recovery screen and click **Continue**. If your email address was correctly registered to a Miramar:Agent account, you will receive an email for account recovery.

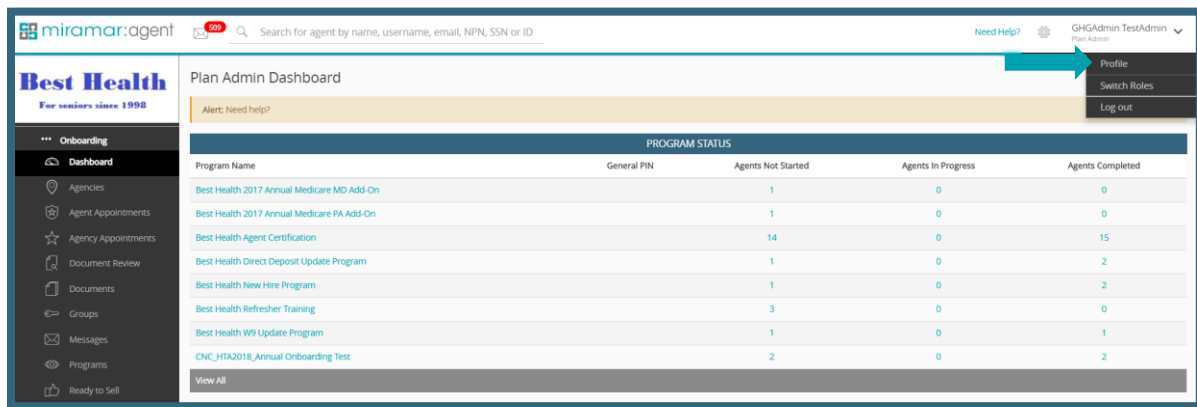


## PROFILE MANAGEMENT

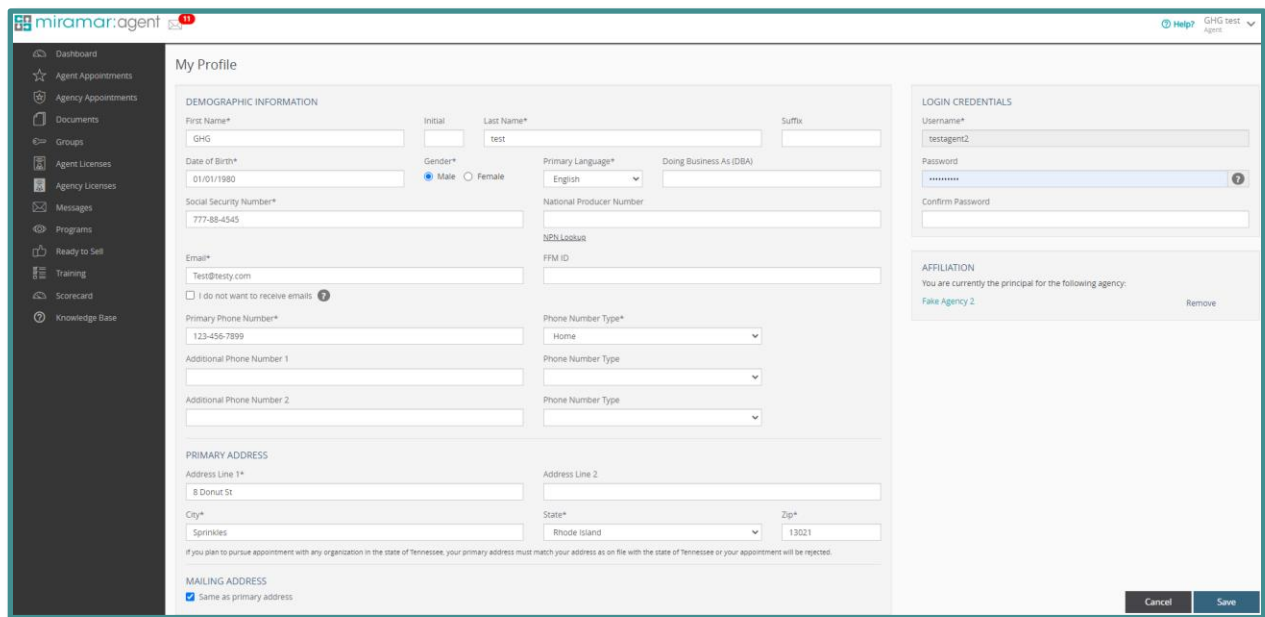
### **How do I update my profile information?**

You can update your profile demographic information or password at any point in time after completing registration.

To do so, move your cursor to the upper right corner of your screen and click the down arrow that appears to the right of your name. A drop-down menu will be displayed. Select **Profile**.



Once you've made the desired changes to your profile, be sure to click **Save** at the bottom of the screen before you leave the page.



**DEMOGRAPHIC INFORMATION**

First Name\*  Initial  Last Name\*  Suffix

Date of Birth\*  Gender\* ☒ Male ☐ Female Primary Language\*  Doing Business As (DBA)

Social Security Number\*  National Producer Number

Email\*  NPI License

Primary Phone Number\*  Phone Number Type\*

Additional Phone Number 1  Phone Number Type

Additional Phone Number 2  Phone Number Type

**PRIMARY ADDRESS**

Address Line 1\*  Address Line 2

City\*  State\*  Zip\*

**MAILING ADDRESS**

☒ Same as primary address

**LOGIN CREDENTIALS**

Username\*

Password


Confirm Password

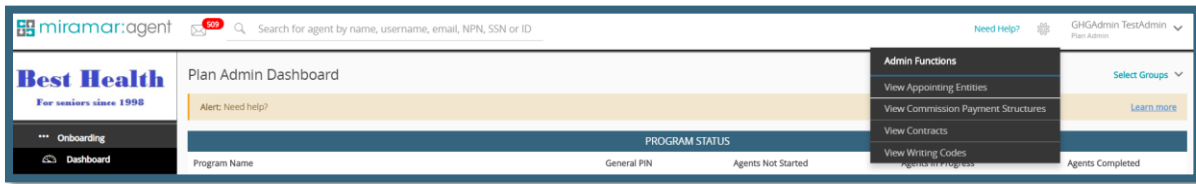
**AFFILIATION**

You are currently the principal for the following agency:


Fake Agency 2

## ADMINISTRATOR FUNCTIONS

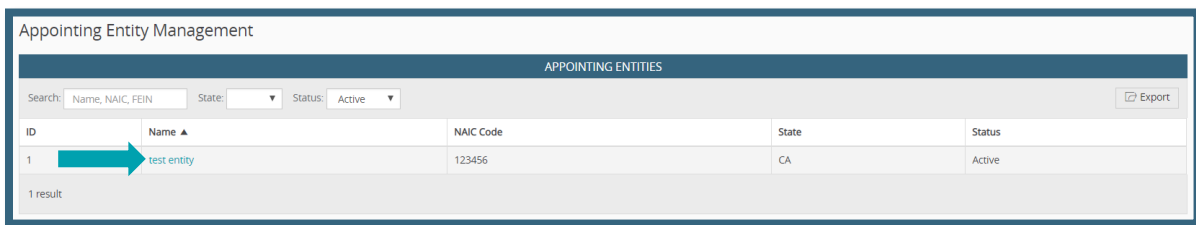
As a plan administrator, you're able to access many administrative functions using the gear icon  located at the top right corner of the screen, directly to the left of your name. Click into any of the following to view more information on each of the administrative functions: Appointing Entities, Commission Payment Structures, Contracts, and Writing Codes.



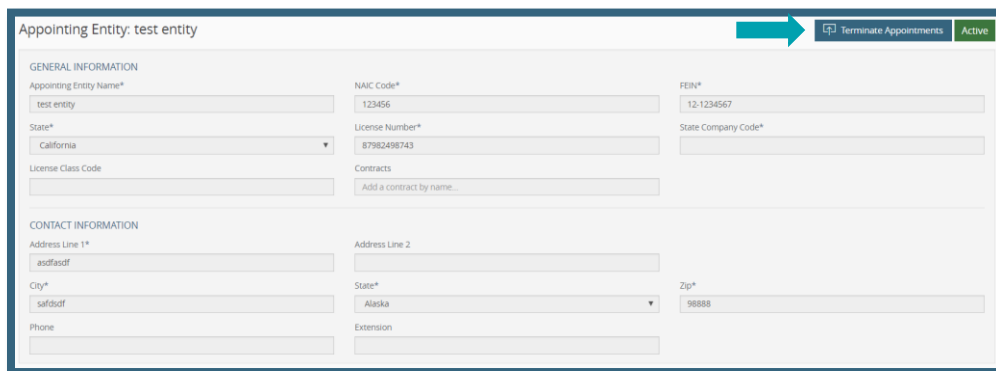
## View Appointing Entities

To manage Appointing Entities, click the gear icon  in the upper right corner of the screen and select **View Appointing Entities** from the drop-down menu. Here you will find the Appointing Entity Management index where you can review any entities associated with your plan.

To view a specific entity's information, click into the *entity name*.




Once you have clicked into the *entity name*, you will be able to find the general information and contact information for that entity.




From this page, you will also have the option to do a batch termination of appointments by clicking into **Terminate Appointments**.

## View Commission Payment Structures

To manage Commission Payment Structures, click the gear icon  in the upper right corner of the screen and select **View Commissions Payment Structures** from the drop-down menu. Here you will find the Commission Payment Structure Management index. Keep in mind, you will only be able to view this index if you utilize our Commissions module.

To view specific payment structure information, click into the *ID number*.

Commission Payment Structure Management					
COMMISSION PAYMENT STRUCTURES					
Search: Title, contract...		Benefit Year: <span></span>	Status: Active <span></span>	 Export	
ID	Title ▲	Group	Contract	Benefit Year	Status
1	best	April Agency Ltd	Gold Plan	2017	Active
1 result					

Once you have clicked into the *structure ID*, you will be able to view general information and payment structure information from this page.

Commission Payment Structure: best
Active

GENERAL INFORMATION

Title\*

best

Group\*

1 - April Agency Ltd

Contract\*

1 - Gold Plan

Plan Benefit Package(s)\*

1 checked

Initial Enrollment Payment Method\*

Up Front

Rollover Enrollment Payment Method\*

By Month

Benefit Year\*

2017

☐ Is Internal Payment Structure

☒ Chargeback Rapid DER?

PAYMENT STRUCTURE

Agent New Enrollment Rate

100.00

Agent Renewal Enrollment Rate

150.00

Agent Rollover Enrollment Rate

Level 1 Agency

Fake Agency Supreme

Level 1 Agency New Enrollment Rate


100.00

Level 1 Agency Renewal Enrollment Rate

150.00

Level 1 Agency Rollover Enrollment Rate

## View Contracts

To manage Contracts, click the gear icon  in the upper right corner of the screen and select **View Contracts** from the drop-down menu. Here you will find the Contract Management index where you will be able to access all of your plans' contract information.

To view specific contract information, click into the *contract name*.



Contract Management				
CONTRACTS				
Search: <input type="text"/> Name, number    Line of Business: <input type="text"/> Status: <input type="text"/> Active <a href="#">Export</a>				
ID	Name	Number ▲	Line of Business	Status
124	Scott and White Test Contract	H1111	Medicare	Active
1	Gold Plan	H1234	Medicare	Active
113	Best Health Texas	H1234	Medicare	Active
114	Best Health Ohio	H5678	Medicare	Active
115	Best Health Michigan	H9876	Medicare	Active
5 results				

Once you have clicked into the *contract name*, you will be able to view general information and plan benefit packages.

Contract: Gold Plan

Active

GENERAL INFORMATION

Contract Name\*

Gold Plan

Number\*

H1234

Line Of Business\*

Medicare

Start Date\*

01/01/2016

End Date


Description

PLAN BENEFIT PACKAGE MANAGEMENT

[Export](#)

PLAN BENEFIT PACKAGES			
ID	Name	Number ▲	Status
1	best	001	Active
221	worst	0013	Active
2 results			

## View Writing Codes

To manage Writing Codes, click the gear icon  in the upper right corner of the screen and select **View Writing Codes** from the drop-down menu. Here you will find the writing code structures set up specifically for your plan.

To view specific writing code setups, click into the *writing code prefix*.

Plan Writing Code Management			
PLAN WRITING CODES			
Search: Prefix, description		Status: Active	Export
ID	Prefix ▲	Description	Status
1	EMB	Emblem External Format	Active
1 result			

Once you have clicked into the *writing code prefix*, you will be able to view the general information.

miramar:agent

Best Health Plan, Inc.

Help?

GHGAdmin TestAdmin Plan Manager

Best Health

For seniors since 1998

Onboarding

Dashboard

Agencies

Agent Appointments

Agency Appointments

Document Review

Documents

Plan Writing Code: BST

Active

GENERAL INFORMATION

Prefix\*

BST

Description\*

Best Health Writing Code

Suffix Length\*

4

Min Start Value\*

1000

Exclude Start Value

Exclude End Value

Start Date\*

01/01/2018

End Date

Created by afleming 3/14/2018 12:07am

Last modified by afleming 3/14/2018 12:07am

## ONBOARDING

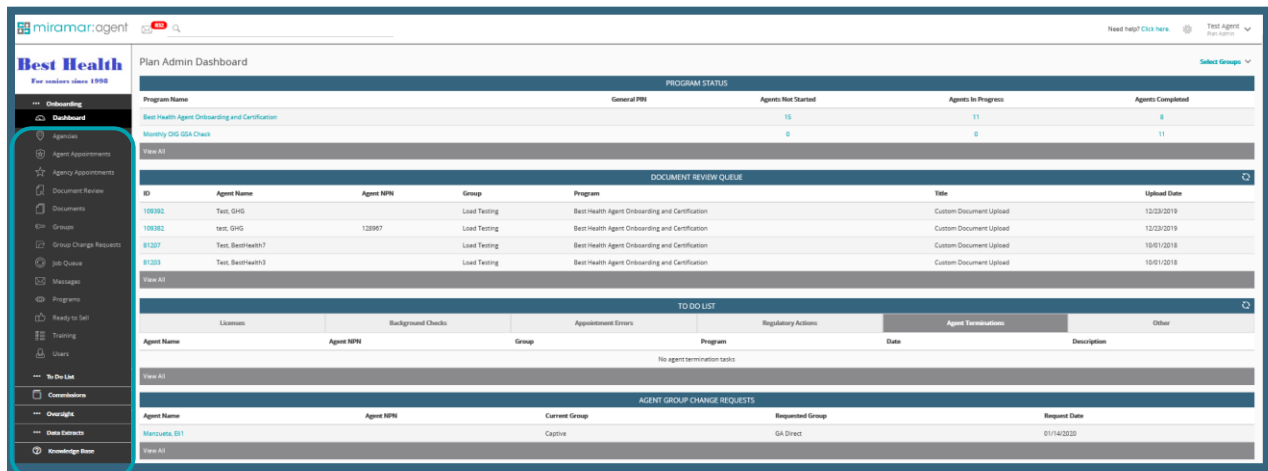
### ONBOARDING DASHBOARD

The Onboarding Module's Plan Administrator Dashboard is the main landing page when you log in to Miramar:Agent. This Dashboard provides a snapshot of your plan's activity in several categories, including *Program Status*, *Groups*, *Ready to Sell status*, *Training*, and *New Messages*. It also provides a snapshot of your *To Do List*, which includes your *Documents Review Queue*, *Group Change Requests*, *License Errors*, *Background Checks*, *Appointment Errors*, *Regulatory Actions*, and *Other* items for review.



**NOTE:** Be aware the sections available on your Dashboard are dependent on the services your plan has licensed through CHS. For example, if CHS is not contracted with your plan to provide appointment services, you will not see the Appointment tab or widget on your dashboard.

In addition to the snapshots of agent activity under each widget, the **Onboarding** menu to the left of the Dashboard also provides access to these areas as well as Users, Commissions, Oversight, and File Management. Click into any of the categories under the menu to view more information.



**Plan Admin Dashboard**

**PROGRAM STATUS**

Program Name	General PIN	Agents Not Started	Agents In Progress	Agents Completed
Best Health Agent Onboarding and Certification		15	11	8
Monthly GIG GSA Check		0	0	11

**DOCUMENT REVIEW QUEUE**

ID	Agent Name	Agent NPN	Group	Program	Title	Upload Date
100382	Test, GIG		Lead Testing	Best Health Agent Onboarding and Certification	Custom Document Upload	12/29/2018
100382	Test, GIG	120967	Lead Testing	Best Health Agent Onboarding and Certification	Custom Document Upload	12/29/2018
81227	Test, BestHealth7		Lead Testing	Best Health Agent Onboarding and Certification	Custom Document Upload	10/01/2018
81228	Test, BestHealth3		Lead Testing	Best Health Agent Onboarding and Certification	Custom Document Upload	10/01/2018

**TO DO LIST**

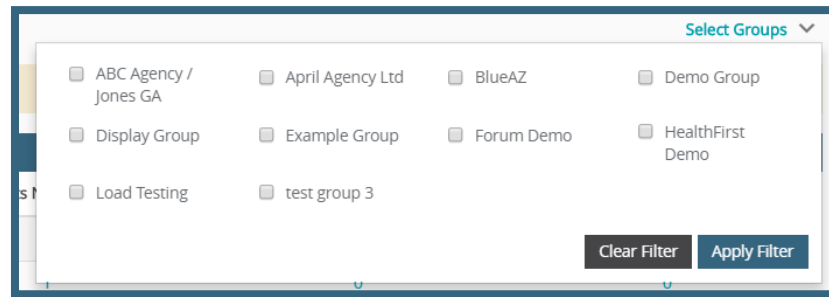
License	Background Checks	Appointment Errors	Regulatory Actions	Agent Terminations	Other
Agent Name	Agent NPN	Group	Program	Date	Description
No agent termination table					

**AGENT GROUP CHANGE REQUESTS**

Agent Name	Agent NPN	Current Group	Requested Group	Request Date
Manuelita, B1		Captive	GA Direct	01/14/2020



**GET ORGANIZED:** If your day-to-day responsibilities within the system only involve working with select groups, you can filter your dashboard to show only a limited set. Do this by clicking **Select Groups** in the top right corner, making your selections, and applying the filter.



Select Groups ▼

- ☐ ABC Agency / Jones GA
- ☐ April Agency Ltd
- ☐ BlueAZ
- ☐ Demo Group
- ☐ Display Group
- ☐ Example Group
- ☐ Forum Demo
- ☐ HealthFirst Demo
- ☐ Load Testing
- ☐ test group 3

Clear Filter Apply Filter

## Dashboard Widgets

The Dashboard widgets will display a snapshot of data. More information can be found by clicking into the corresponding section on the navigation menu to the left.



**QUICK TIP:** Clicking **View All** at the bottom of any widget will open the full index of information, also accessible by clicking into the category from the left side navigation panel as mentioned above.

## Program Status

Active programs will be listed here as well as a snapshot of agent status for each. If applicable, the General PIN code will be listed to be used for existing agent registration.

Click into the program name to view the program information page, which includes general information, permitted groups and corresponding PIN codes, and notification settings.

Click into the numbers listed under *Agents Not Started*, *Agents In Progress*, or *Agents Completed* to view all agents who are categorized by that status in the Program Agent Management index.

PROGRAM STATUS				
Program Name	General PIN	Agents Not Started	Agents In Progress	Agents Completed
Best Health 2017 Annual Medicare MD Add-On		1	0	0
Best Health 2017 Annual Medicare PA Add-On		1	0	0
Best Health Agent Certification		14	0	15
Best Health Direct Deposit Update Program		1	0	2

### Document Review Queue

Documents pending plan administrator review will be listed here. To review and approve, you can click into the ID number associated with the document you would like to review.

DOCUMENT REVIEW QUEUE						
ID	Agent Name	Agent NPN	Group	Program	Title	Upload Date
84360	alth10		Load Testing	Best Health Agent Onboarding and Certification	Custom Document Upload	11/07/2018
81207	Test_BestHealth7		Load Testing	Best Health Agent Onboarding and Certification	Custom Document Upload	10/01/2018
81203	Test_BestHealth3	12345699	Load Testing	Best Health Agent Onboarding and Certification	Custom Document Upload	10/01/2018
View All						

### To Do List

The To Do List organizes all Plan Manager action items into one place. Click into the respective tabs to view more information regarding *License Overrides*, *Background Checks*, *Appointment Errors*, *Regulatory Actions*, or *Other* for actionable items specific to the plan.

The tab highlighted in dark grey is the tab you are currently in (ex. Agent Terminations).

The number in the green circle next to the title of each tab refers to how many new records are in each category.

To action any item, click into the *action button* listed under the *Description* column.

TO DO LIST					
License Overrides	Background Checks	Appointment Errors	Regulatory A	Agent Terminations	Other
Agent Name	Agent NPN	Group	Program	Date	Description
No agent termination tasks					
View All					

### Agent Group Change Requests

Agents who have requested a group change will be routed to your Agent Group Change Requests queue. To review and approve or deny a group change request, click into the agents' name.

AGENT GROUP CHANGE REQUESTS				
Agent Name	Agent NPN	Current Group	Requested Group	Request Date
Manzueta, Eli1		Captive	GA Direct	01/14/2020
View All				

### Groups

The Groups widget gives a snapshot of how many active agents are in each active group.

Click into a *Group ID* under the ID column to view the group's general information.

Click into a number under the *Agents* column to view Group Member Management. Here you can view all agents associated to the group and their status, add new agents, or do a batch group change.

GROUPS		
ID	Name	Agents
452	ABC Agency / Jones GA	0
1	Agency Ltd	10
1135	BlueAZ	0
1209	Demo Group	3
449	Display Group	0
2	Example Group	0
1110	Forum Demo	0
1180	HealthFirst Demo	0
1131	Load Testing	2632
453	test group 3	0
View All		

### Ready to Sell

The Ready to Sell widget will give you a snapshot of your Ready to Sell and the agents who are in good standing for the current and previous benefit years.

**Ready to Sell (RTS)** is a static status assigned at the time the agent goes through their certification program after they have completed all required steps determined by each individual plan. RTS most commonly includes the confirmation of an active license and appointment. Because RTS ties to license and appointment, an agent may have multiple RTS statuses per plan if they are licensed and appointed in multiple states.

**Good Standing** is the current status of an agent who has already been assigned an RTS status and who holds an active license and an active appointment. An agent can lose good standing because of an inactive license or appointment.



**EXAMPLE:** April Agent completed her Best Health Certification Program and was assigned a Ready to Sell status on 10/1/2022. Her license expired at the end of the calendar year, after which point she was no longer in good standing.

Click into a *contract name* to view contract information and plan benefit package information.


READY TO SELL					
Contract	State	2023 Total Good Standing		2024 Total Good Standing	
Gold Plan (H1234)	AK	0	0	0	0
Gold Plan (H1234)	LA	0	0	0	0
Gold Plan (H1234)	NY	0	0	0	0
Best Health Texas (H1234)	TX	0	0	0	0
Best Health Ohio (H5678)	OH	0	0	0	0
Best Health Michigan (H9876)	MI	0	0	0	0
Silver Plan (H1111)	CA	0	0	0	0
Silver Plan (H1111)	TX	0	0	0	0
Demo Contract (2018)	AZ	0	0	0	0
Demo Contract 2019 (2019)	DC	0	0	0	0
Best Health Plans (H9999)	AZ	0	0	0	0
Best Health Plans (H9999)	DC	0	0	0	0
View All					

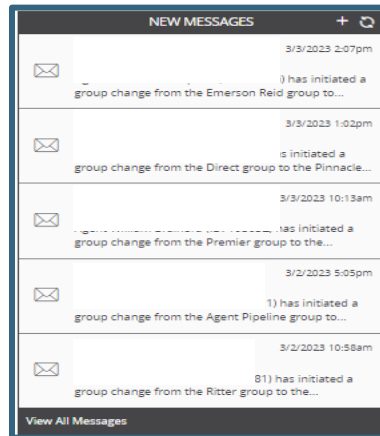
### Training

The Training widget shows active trainings and the number of enrolled agents and completed agents for each. This widget is not actionable aside from being able to **View All**.

TRAINING			
Course ID	Course Name	Enrolled Agents	Completed Agents
No results			
View All			

## Messages

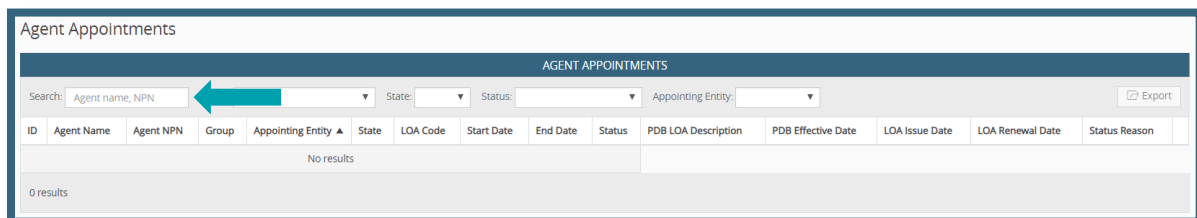
The Messages widget shows the most recent messages to come into your inbox. New messages can be opened directly from the widget by clicking into the *envelope icon*  next to each message. You can also create a new message by clicking the + at the top right corner.



## Dashboard Index Navigation

### Searching within Dashboard Indexes

You have the ability to search within an index. Search criteria will differ depending on the index you are currently accessing. The search bar, found at the top left of each index, will tell you which search options are available.



### Filtering within Dashboard Indexes

In addition to search, you can also filter the index to locate specific information. Similarly, each index has unique filtering options based on the information they contain.



**QUICK TIP:** Most indexes are defaulted to Status = Active. If you do not see an item in an index you would expect to be there, double check it is not marked as inactive.



AGENT APPOINTMENTS														
Search: <input type="text" value="Agent name, NPN"/> Group: <input type="text"/> State: <input type="text"/> Status: <input type="text"/> Appointing Entity: <input type="text"/> <input type="button" value="Export"/>														
ID	Agent Name	Agent NPN	Group	Appointing Entity	State	LOA Code	Start Date	End Date	Status	PDB LOA Description	PDB Effective Date	LOA Issue Date	LOA Renewal Date	Status Reason
No results														
0 results														

### Expand Results

All indexes are defaulted to only show 10 items at a time. At the bottom of the index, select the drop-down to change to 10, 25, 50, or all records.

37 results	<input type="button" value="Show: 10 Items"/>	<input type="button" value="1 of 4"/>
------------	---	---------------------------------------

### Export Index Data

Each index, found on the landing page for each of the Onboarding, To Do List, and Admin Functions menu items, can be exported into an Excel spreadsheet. The data included is unique to each index.

Be sure to apply any filters you want prior to running the export. Click **Export** at the top right corner of each index to run the report.

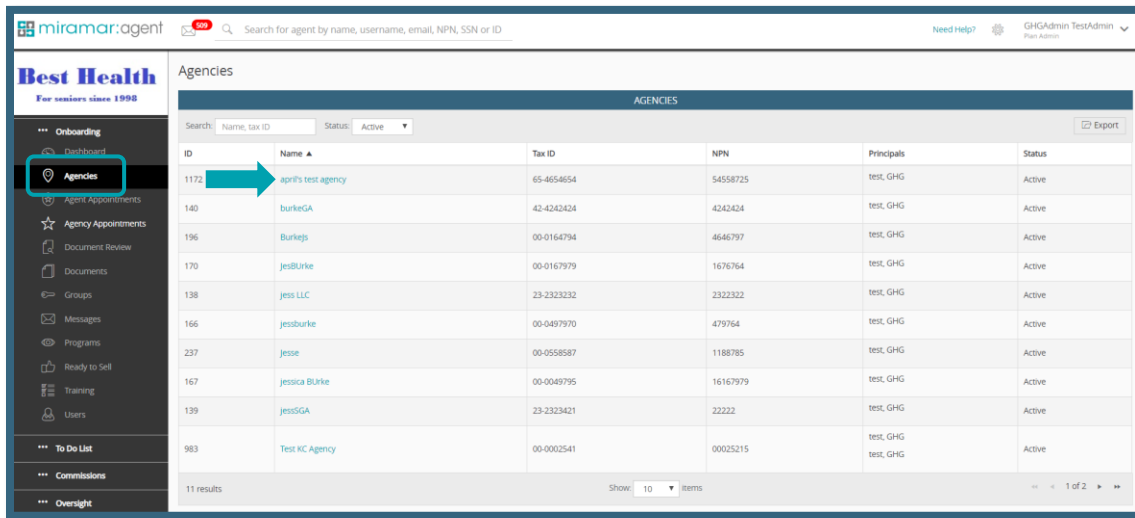
READY TO SELL ENTRIES											
Search: <input type="text" value="Agent name or NPN"/> Benefit Year: <input type="text"/> Group: <input type="text"/> State: <input type="text"/> Licensed: <input type="text"/> Appointed: <input type="text"/> <input type="button" value="Export"/>											
ID	Agent Name	Agent NPN	Group	Contract	Benefit Year	LOB	State	Effective Date	Licensed	Appointed	
93125	test, GHG		Load Testing	Best Health Texas (H1234)	2017	Medicare	NJ	06/22/2017	✓	✓	
93126	test, GHG		Load Testing	Best Health Ohio (H5678)	2017	Medicare	OH	06/22/2017	✗	✗	
93127	test, GHG		Load Testing	Best Health Michigan (H9876)	2017	Medicare	MI	06/22/2017	✓	✗	

## AGENCIES

To manage agencies associated to your plan, click **Agencies** from the *Onboarding* menu on the left side of the screen. Here you will see the Agencies index, and you can click into any of the *agency names* for more detailed information.



**NOTE:** Agencies are set up by the principal agent and will show under your plans' Agencies index if the principal agent is associated to your plan. You may not necessarily recognize the agencies listed under your index.



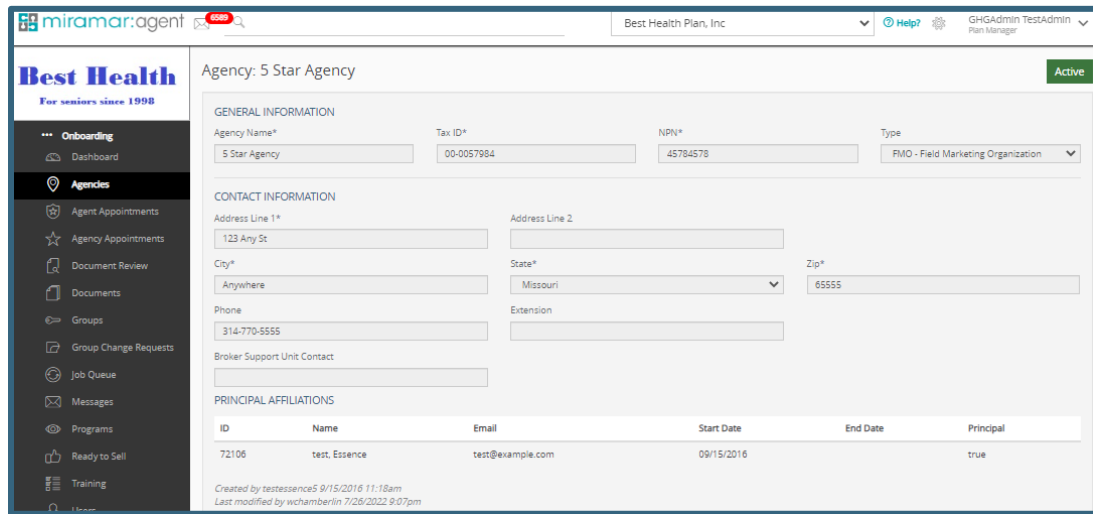
**Agencies**

Search:  Name, tax ID Status: Active

ID	Name	Tax ID	NPN	Principals	Status
1172	april's test agency	65-4654654	54558725	test, GHG	Active
140	burkeGA	43-4343434	4343434	test, GHG	Active
196	Burkejs	00-0164794	4646797	test, GHG	Active
170	jessBurke	00-0167979	1676764	test, GHG	Active
138	jess LLC	23-2323232	2323232	test, GHG	Active
166	jessburke	00-0497970	479764	test, GHG	Active
237	jesse	00-0558587	1188785	test, GHG	Active
167	jessica BURke	00-0049795	16167979	test, GHG	Active
139	jessGA	23-2323421	22222	test, GHG	Active
983	Test KC Agency	00-0002541	00025215	test, GHG test, GHG	Active

11 results Show 10 items 1 of 2

On the Agency page, you will find general information, contact information, and principal agent information for the specific agency. Click **Cancel** at the bottom of the agency information page to return to the Agencies Index.



**Agency: 5 Star Agency** Active

**GENERAL INFORMATION**

Agency Name\* 5 Star Agency Tax ID\* 00-0057984 NPI\* 45784578 Type RMO - Field Marketing Organization

**CONTACT INFORMATION**

Address Line 1\* 123 Any St Address Line 2 City\* Anywhere State\* Missouri Zip\* 65555

Phone 314-770-5555 Extension Broker Support Unit Contact

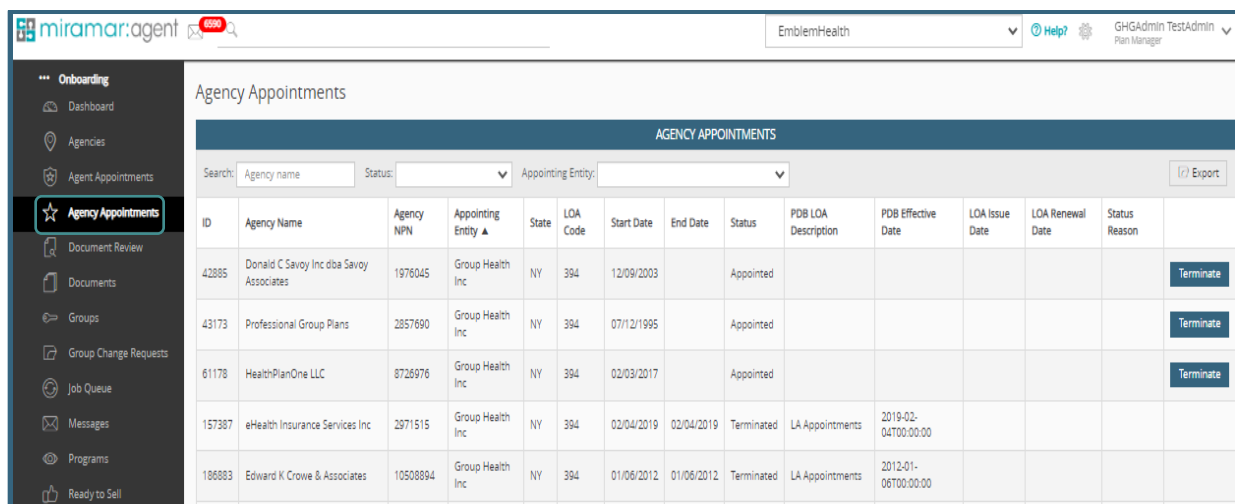
**PRINCIPAL AFFILIATIONS**

ID	Name	Email	Start Date	End Date	Principal
72106	test, Essence	test@example.com	09/15/2016		true

Created by testessence 9/15/2016 11:18am  
Last modified by wchamberlin 7/26/2022 9:07pm

## AGENT APPOINTMENTS

To manage Agent Appointments, click **Agent Appointments** from the *Onboarding* menu on the left side of your screen. Here you will see the Agent Appointment Index where you can find all appointments tied to your plans' entity(ies).



**Agency Appointments**

Search: Agency name Status: Appointing Entity: Export

ID	Agency Name	Agency NPI	Appointing Entity	State	LOA Code	Start Date	End Date	Status	PDB LOA Description	PDB Effective Date	LOA Issue Date	LOA Renewal Date	Status Reason	
42885	Donald C Savoy Inc dba Savoy Associates	1976045	Group Health Inc	NY	394	12/09/2003		Appointed						Terminate
43173	Professional Group Plans	2857690	Group Health Inc	NY	394	07/12/1995		Appointed						Terminate
61178	HealthPlanOne LLC	8726976	Group Health Inc	NY	394	02/03/2017		Appointed						Terminate
157387	eHealth Insurance Services Inc	2971515	Group Health Inc	NY	394	02/04/2019	02/04/2019	Terminated	LA Appointments	2019-02-04T00:00:00				
186883	Edward K Crowe & Associates	10508894	Group Health Inc	NY	394	01/06/2012	01/06/2012	Terminated	LA Appointments	2012-01-06T00:00:00				



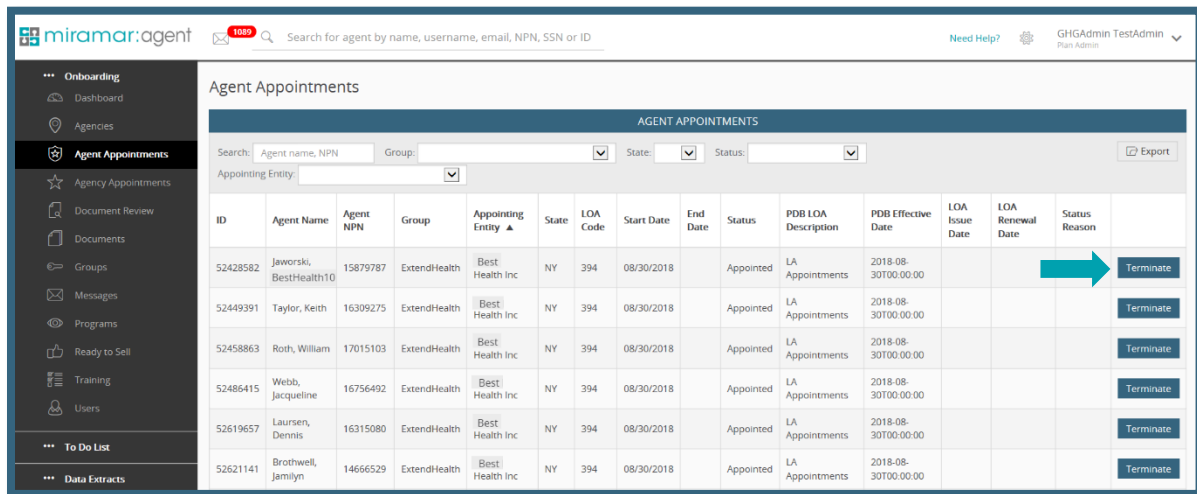
**QUICK TIP:** It is important to note the different appointment statuses as they provide more detail than the typical active/inactive filter. Knowing what each status indicates will make it easier to quickly research individual agent's progress or status in Miramar:Agent.

Status	Definition
<b>Appointed</b>	The agent holds a current, active appointment. This information is provided by the National Insurance Producer Registry (NIPR) for appointing states and created by Miramar:Agent for record-only states.
<b>Terminated</b>	The agent's appointment is terminated and no longer active. This status is provided by NIPR for appointing states and Miramar:Agent for record-only states.
<b>Pending</b>	The agent's appointment request passed technical validation with NIPR but has not yet been processed. This status is provided by NIPR.  <b>NOTE:</b> A Pending appointment can still be rejected for reasons such as agent standing, name mismatch, address mismatch, etc.
<b>Confirmed Pending</b>	The agent's appointment has been confirmed, but the appointment information has not yet been transmitted to Miramar:Agent. This status is provided by NIPR.
<b>Submitted to State</b>	The agent's appointment request passed technical validation with NIPR and has been forwarded by NIPR to the state for review. This status is provided by NIPR.  The status is also provided when an appointment is submitted by CHS staff directly to states that do not utilize NIPR for appointments (FL, MA, PR).  <b>NOTE:</b> A Submitted to State appointment can still be rejected for reasons such as agent standing, name mismatch, address mismatch, etc.
<b>Requested Termination</b>	The agent's appointment termination request passed technical validation with NIPR, but has not yet been processed. This status is provided by Miramar:Agent.

### How do I terminate an agent's appointment?

Terminating an agent's appointment can be done from the Agent Appointments index or from the individual agent's appointment page.

To process a termination from the Agent Appointments index, click the **Terminate** button next to the appointment you wish to terminate.



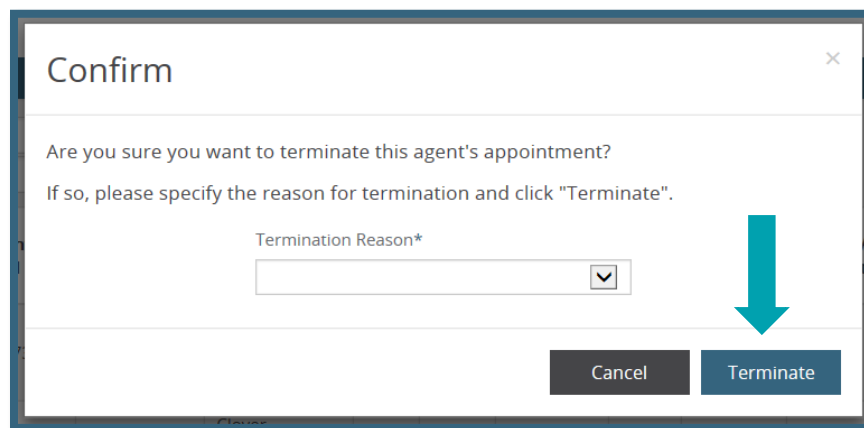
The screenshot shows the 'Agent Appointments' page in the miramar:agent system. The table lists appointments with columns for ID, Agent Name, Agent NPN, Group, Appointing Entity, State, LOA Code, Start Date, End Date, Status, PDB LOA Description, PDB Effective Date, LOA Issue Date, LOA Renewal Date, Status Reason, and a 'Terminate' button. A red arrow points to the 'Terminate' button for the first row.

ID	Agent Name	Agent NPN	Group	Appointing Entity	State	LOA Code	Start Date	End Date	Status	PDB LOA Description	PDB Effective Date	LOA Issue Date	LOA Renewal Date	Status Reason	Terminate
52428582	Jaworski, BestHealth10	15879787	ExtendHealth	Best Health Inc	NY	394	08/30/2018		Appointed	LA Appointments	2018-08-30T00:00:00				Terminate
52449391	Taylor, Keith	16309275	ExtendHealth	Best Health Inc	NY	394	08/30/2018		Appointed	LA Appointments	2018-08-30T00:00:00				Terminate
52458863	Roth, William	17015103	ExtendHealth	Best Health Inc	NY	394	08/30/2018		Appointed	LA Appointments	2018-08-30T00:00:00				Terminate
52486415	Webb, Jacqueline	16756492	ExtendHealth	Best Health Inc	NY	394	08/30/2018		Appointed	LA Appointments	2018-08-30T00:00:00				Terminate
52619657	Laursen, Dennis	16315080	ExtendHealth	Best Health Inc	NY	394	08/30/2018		Appointed	LA Appointments	2018-08-30T00:00:00				Terminate
52621141	Brothwell, Jamlyn	14666529	ExtendHealth	Best Health Inc	NY	394	08/30/2018		Appointed	LA Appointments	2018-08-30T00:00:00				Terminate

Once you have selected to terminate, a confirmation box will pop up. Select the *Termination Reason* from the drop-down menu. Termination reasons vary based on state. To confirm the termination, click **Terminate**. To cancel the termination and return to the Agent Appointments index, click **Cancel**.



**NOTE:** Not all states will require a termination reason.



The screenshot shows a 'Confirm' dialog box with the following text: 'Are you sure you want to terminate this agent's appointment? If so, please specify the reason for termination and click "Terminate".' Below the text is a 'Termination Reason\*' dropdown menu. At the bottom are 'Cancel' and 'Terminate' buttons. A red arrow points to the 'Terminate' button.

Once the termination has been successfully submitted, you will see the green banner below at the bottom of your browser screen.

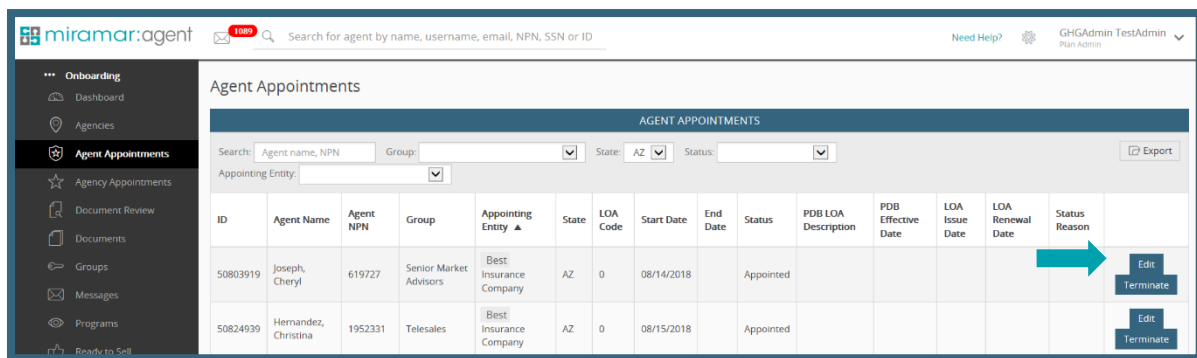


### How do I edit an agent's record-only appointment date?

If for any reason you have the need to edit the effective date of an agent's record-only appointment, you can do so from the Agent Appointments tab. Click **Edit** to update the effective date.

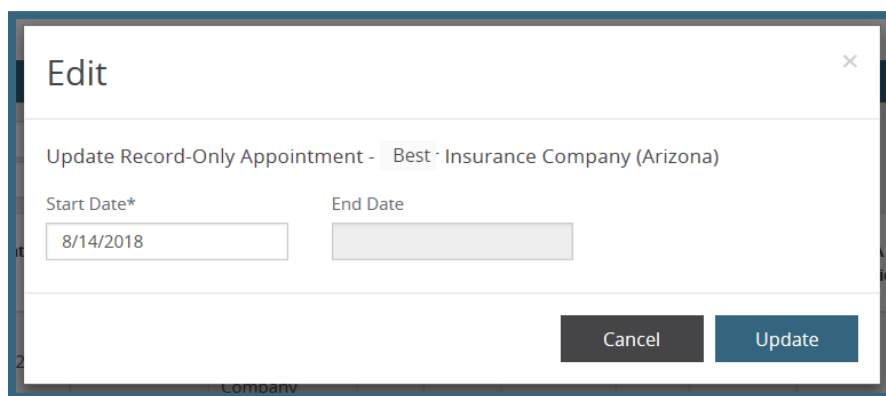


**NOTE:** Record-only states are limited to the following: Alaska, Arizona, Colorado, Illinois, Indiana, Maryland, Missouri, Oregon, and Rhode Island.



The screenshot shows the 'Agent Appointments' section of the miramar:agent interface. It includes a search bar, filters for Group, State, and Status, and an 'Export' button. Below these is a table with columns: ID, Agent Name, Agent NPN, Group, Appointing Entity, State, LOA Code, Start Date, End Date, Status, PDB LOA Description, PDB Effective Date, LOA Issue Date, LOA Renewal Date, and Status Reason. Two records are visible. The first record, ID 50803919, is for Joseph Cheryl, NPN 619727, Senior Market Advisors, Best Insurance Company, AZ, LOA Code 0, Start Date 08/14/2018, Status Appointed. A red arrow points to the 'Edit' button for this record. The second record, ID 50824939, is for Hernandez, Christina, NPN 1952331, Telesales, Best Insurance Company, AZ, LOA Code 0, Start Date 08/15/2018, Status Appointed. Both records have 'Edit' and 'Terminate' buttons.

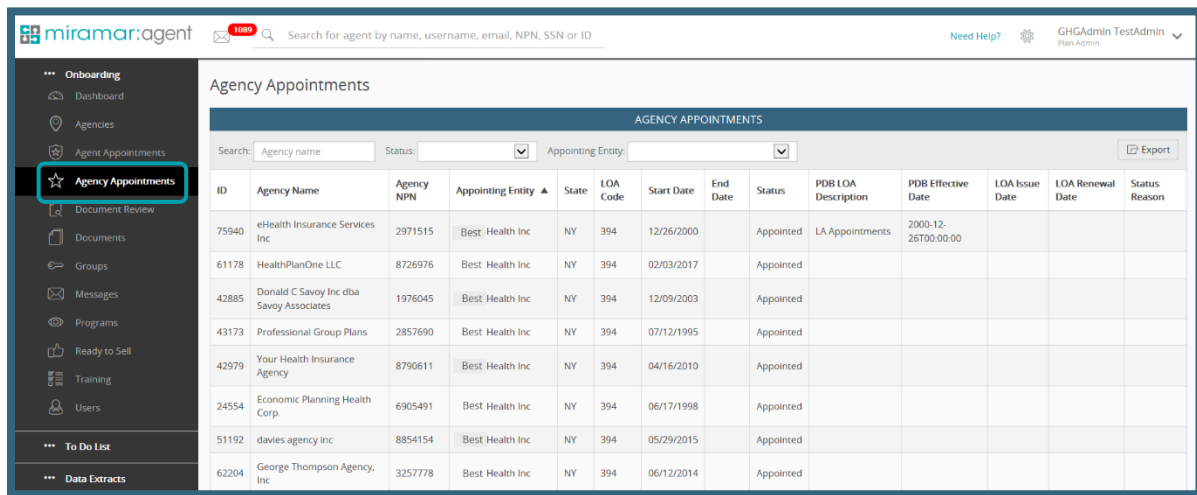
Enter the date you want the effective date to reflect and click **Update** to finalize the change. End dates can only be edited on terminated records.



The 'Edit' modal form is titled 'Update Record-Only Appointment - Best Insurance Company (Arizona)'. It contains two input fields: 'Start Date\*' with the value '8/14/2018' and 'End Date' which is empty. At the bottom right are 'Cancel' and 'Update' buttons.

## AGENCY APPOINTMENTS

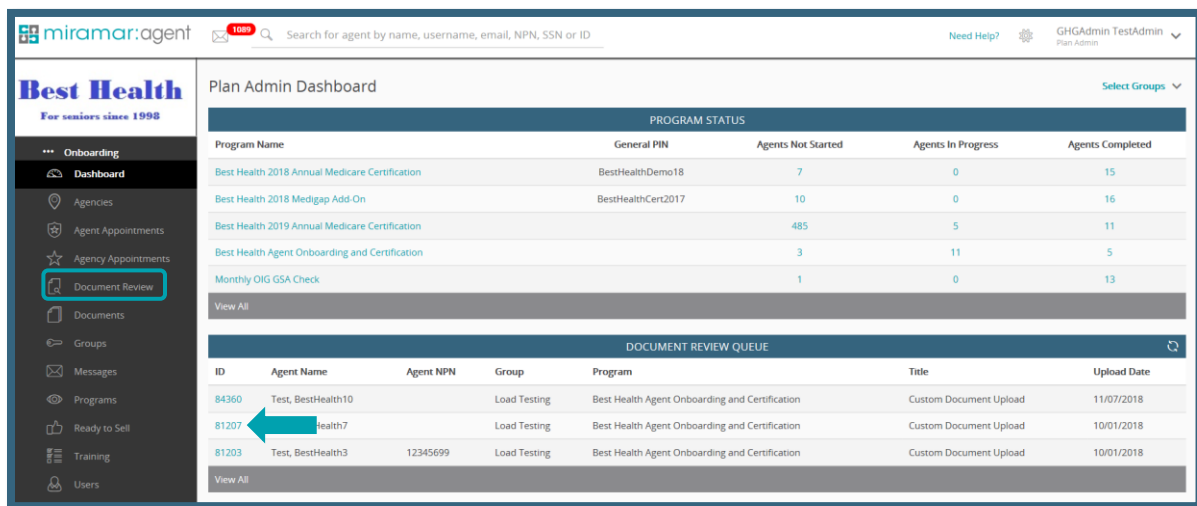
To manage Agency Appointments, click **Agency Appointments** from the *Onboarding* menu on the left side of your screen. Here you will see the Agency Appointment Index where you can find all appointments tied to your plans' entity(ies).



AGENCY APPOINTMENTS													
ID	Agency Name	Agency NPN	Appointing Entity	State	LOA Code	Start Date	End Date	Status	PDB LOA Description	PDB Effective Date	LOA Issue Date	LOA Renewal Date	Status Reason
75940	eHealth Insurance Services Inc	2971515	Best Health Inc	NY	394	12/26/2000		Appointed	LA Appointments	2000-12-26T00:00:00			
61178	HealthPlanOne LLC	8726976	Best Health Inc	NY	394	02/03/2017		Appointed					
42885	Donald C Savoy Inc dba Savoy Associates	1976045	Best Health Inc	NY	394	12/09/2003		Appointed					
43173	Professional Group Plans	2857690	Best Health Inc	NY	394	07/12/1995		Appointed					
42979	Your Health Insurance Agency	8790611	Best Health Inc	NY	394	04/16/2010		Appointed					
24554	Economic Planning Health Corp.	6905491	Best Health Inc	NY	394	06/17/1998		Appointed					
51192	davies agency inc	8854154	Best Health Inc	NY	394	05/29/2015		Appointed					
62204	George Thompson Agency, Inc	3257778	Best Health Inc	NY	394	06/12/2014		Appointed					

## DOCUMENT REVIEW

To manage your Document Review queue, click **Document Review** from the *Onboarding* menu on the left side of your screen or from your dashboard. Click **View All** under the *Document Review Queue*.



PROGRAM STATUS				
Program Name	General PIN	Agents Not Started	Agents In Progress	Agents Completed
Best Health 2018 Annual Medicare Certification	BestHealthDemo18	7	0	15
Best Health 2018 Medigap Add-On	BestHealthCen2017	10	0	16
Best Health 2019 Annual Medicare Certification		485	5	11
Best Health Agent Onboarding and Certification		3	11	5
Monthly OIG GSA Check		1	0	13
<a href="#">View All</a>				

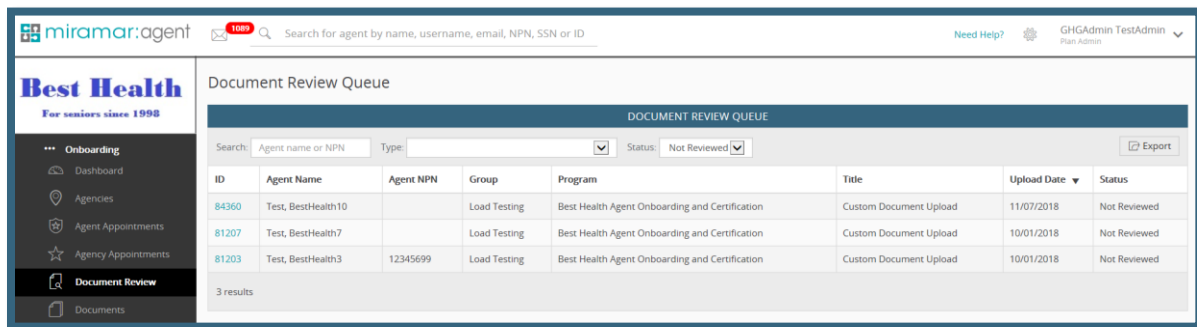
  

DOCUMENT REVIEW QUEUE						
ID	Agent Name	Agent NPN	Group	Program	Title	Upload Date
84360	Test, BestHealth10		Load Testing	Best Health Agent Onboarding and Certification	Custom Document Upload	11/07/2018
81207	Test, BestHealth7		Load Testing	Best Health Agent Onboarding and Certification	Custom Document Upload	10/01/2018
81203	Test, BestHealth3	12345699	Load Testing	Best Health Agent Onboarding and Certification	Custom Document Upload	10/01/2018
<a href="#">View All</a>						

Once you have clicked into the *Document Review Queue*, you will see all documents that are pending review.



**QUICK TIP:** The Document Review Queue is automatically filtered to Not Reviewed. If you want to see documents that have already been reviewed, make sure you filter accordingly.



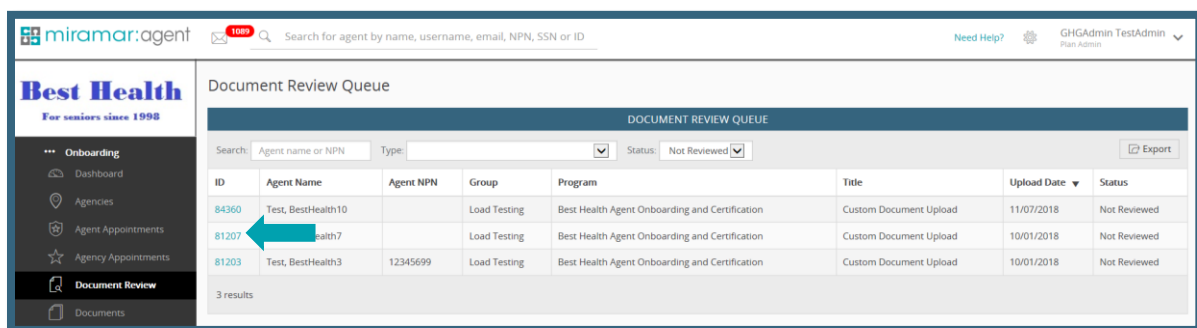
DOCUMENT REVIEW QUEUE							
ID	Agent Name	Agent NPN	Group	Program	Title	Upload Date	Status
84360	Test, BestHealth10		Load Testing	Best Health Agent Onboarding and Certification	Custom Document Upload	11/07/2018	Not Reviewed
81207	Test, BestHealth7		Load Testing	Best Health Agent Onboarding and Certification	Custom Document Upload	10/01/2018	Not Reviewed
81203	Test, BestHealth3	12345699	Load Testing	Best Health Agent Onboarding and Certification	Custom Document Upload	10/01/2018	Not Reviewed

3 results

### How do I review and approve documents?

Depending on the setup of your programs, you may be responsible for reviewing and approving plan-specific documents. This can be done from two places: either from your *Document Review Queue* on your plan admin dashboard or from the *Document Review Queue* index as explained above.

From either place, you will click into the *ID number* next to the document you wish to review.



DOCUMENT REVIEW QUEUE							
ID	Agent Name	Agent NPN	Group	Program	Title	Upload Date	Status
84360	Test, BestHealth10		Load Testing	Best Health Agent Onboarding and Certification	Custom Document Upload	11/07/2018	Not Reviewed
81207	Test, BestHealth7		Load Testing	Best Health Agent Onboarding and Certification	Custom Document Upload	10/01/2018	Not Reviewed
81203	Test, BestHealth3	12345699	Load Testing	Best Health Agent Onboarding and Certification	Custom Document Upload	10/01/2018	Not Reviewed

3 results

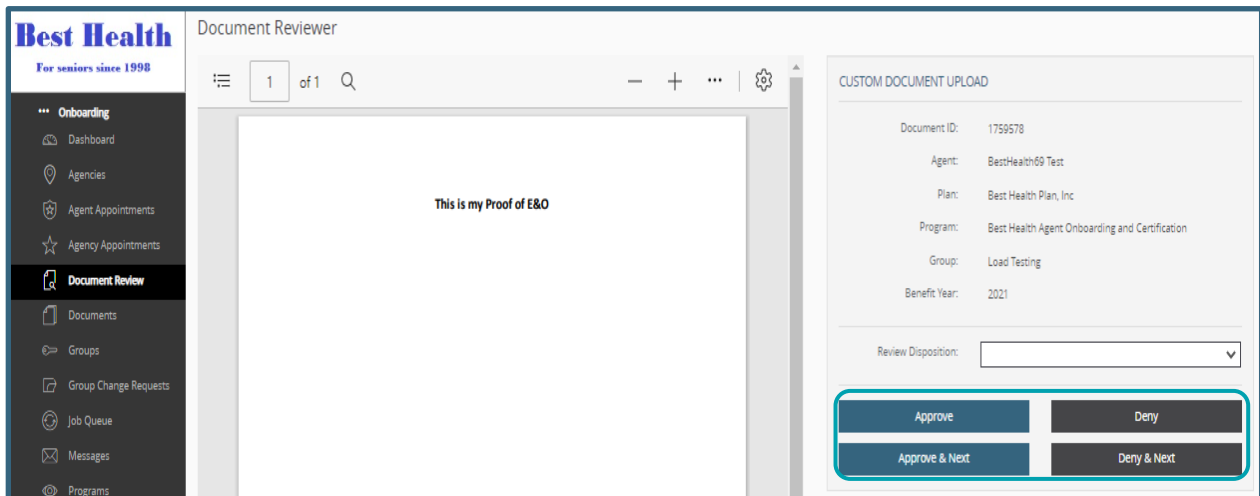
Once you have clicked into the ID number of the document you want to review, you will be presented with the screen below. After reviewing the document, you have the option to either approve or deny the document.

Approving the document will mark the agent as complete for his or her corresponding document upload step within his or her program. To approve the document and return to the Document Review Queue index, click **Approve**. To approve the document and go to the next document review page, click **Approve & Next**.



Denying the document will return the agent to the document upload step to give him or her another opportunity to upload the document. To deny the document and return to the Document Review Queue index, click **Deny**. To deny the document and go to the next document review page, click **Deny & Next**. When denying a document you will also be prompted to select a **Review Disposition**, which describes the reason for document denial.

To go back to the Document Review Queue index without approving or denying the document, click **Cancel**.

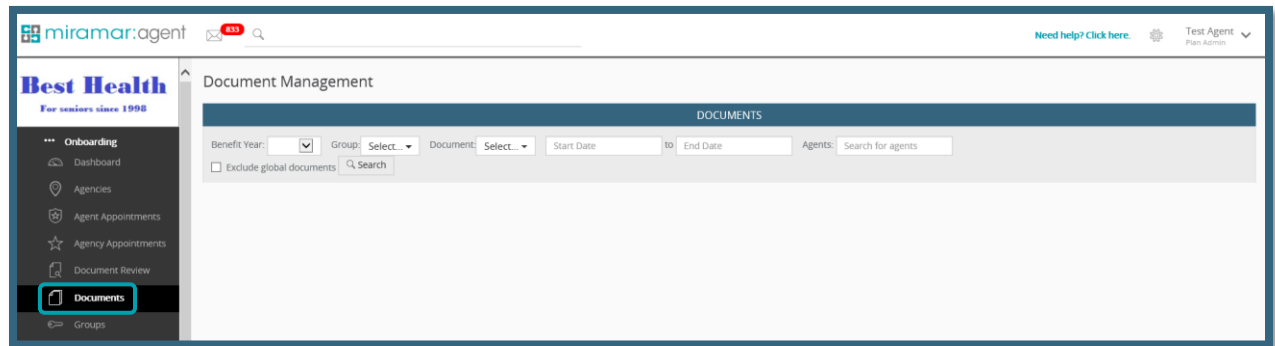


After selecting one of the approved or denied options, and the document has successfully registered as such, you will see a confirmation banner at the bottom of your browser's screen.



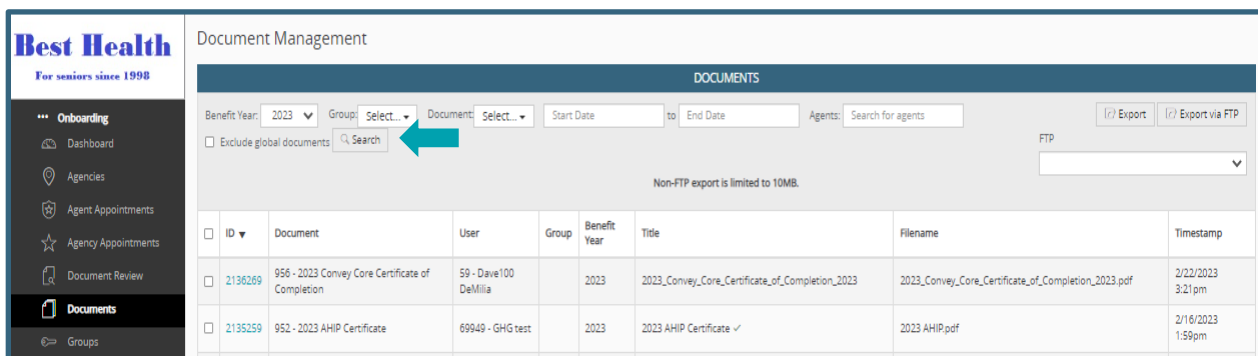
## DOCUMENTS

You have the ability to view all documents that are associated to your plan under the Documents section, accessible by clicking **Documents** from the *Onboarding* menu on the left side of your screen or from your dashboard.

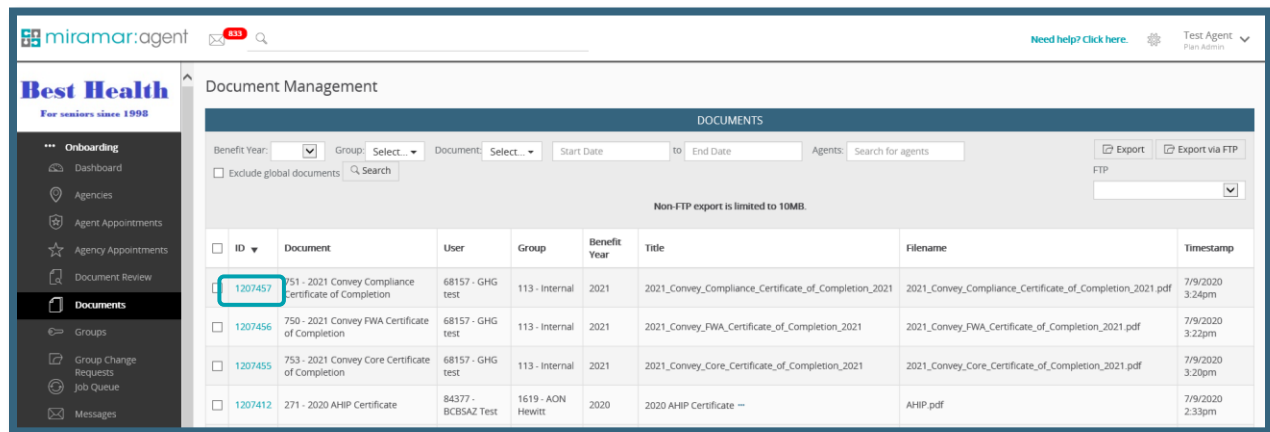


Documents you will find here include training completion certificates, W-9 forms, or any other forms that are specific to your plan's onboarding program such as agent agreements, code of conducts, or direct deposit forms.

Upon initially clicking into the Documents section, no documents will be viewable. To view all available documents, click **Search**. You can also narrow your search by filtering on Benefit Year, Group, Document Type, and date range.



You can view the individual document by clicking into the *document ID*.



ID	Document	User	Group	Benefit Year	Title	Filename	Timestamp
1207457	751 - 2021 Convey Compliance Certificate of Completion	68157 - GHG test	113 - Internal	2021	2021_Convey_Compliance_Certificate_of_Completion_2021	2021_Convey_Compliance_Certificate_of_Completion_2021.pdf	7/9/2020 3:24pm
1207456	750 - 2021 Convey FWA Certificate of Completion	68157 - GHG test	113 - Internal	2021	2021_Convey_FWA_Certificate_of_Completion_2021	2021_Convey_FWA_Certificate_of_Completion_2021.pdf	7/9/2020 3:22pm
1207455	753 - 2021 Convey Core Certificate of Completion	68157 - GHG test	113 - Internal	2021	2021_Convey_Core_Certificate_of_Completion_2021	2021_Convey_Core_Certificate_of_Completion_2021.pdf	7/9/2020 3:20pm
1207412	271 - 2020 AHP Certificate	84377 - BCBSAZ Test	1619 - AON Hewitt	2020	2020 AHP Certificate --	AHP.pdf	7/9/2020 2:33pm

Additionally, the status of an uploaded document will appear next to the document title.

- A grey ellipses (...) indicates the review is in progress.
- A green check mark (✓) indicates the certificate was accepted.
- A red X indicates the certificate was rejected.

### How do I export documents?

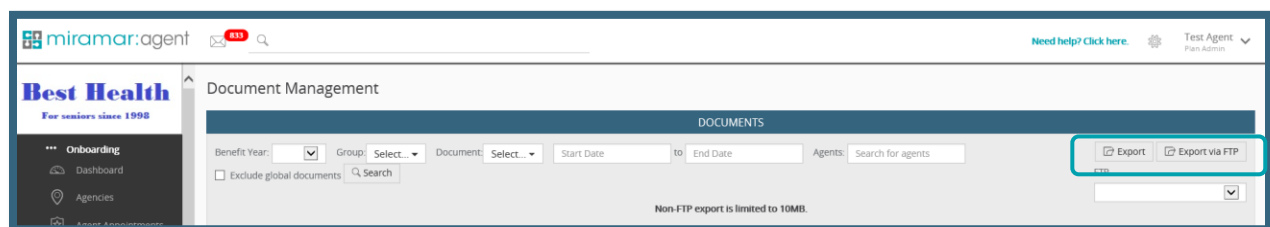
You have the ability to export an individual document by clicking into the documents ID number.

To export documents in bulk, you can export a limited amount of documents locally to the browser by checking off the boxes next to the report ID and clicking **Export**. This is limited by the size of reports, so you may only be able to download a few at a time.

You can also export an unlimited amount of reports by checking off the boxes next to the report ID, selecting the FTP that you want it to deliver to and clicking **Export via FTP**.



**IMPORTANT NOTE:** If you do not have an FTP set up for delivery of reports and documents within Miramar:Agent, please reach out to your designated Client Services Manager.

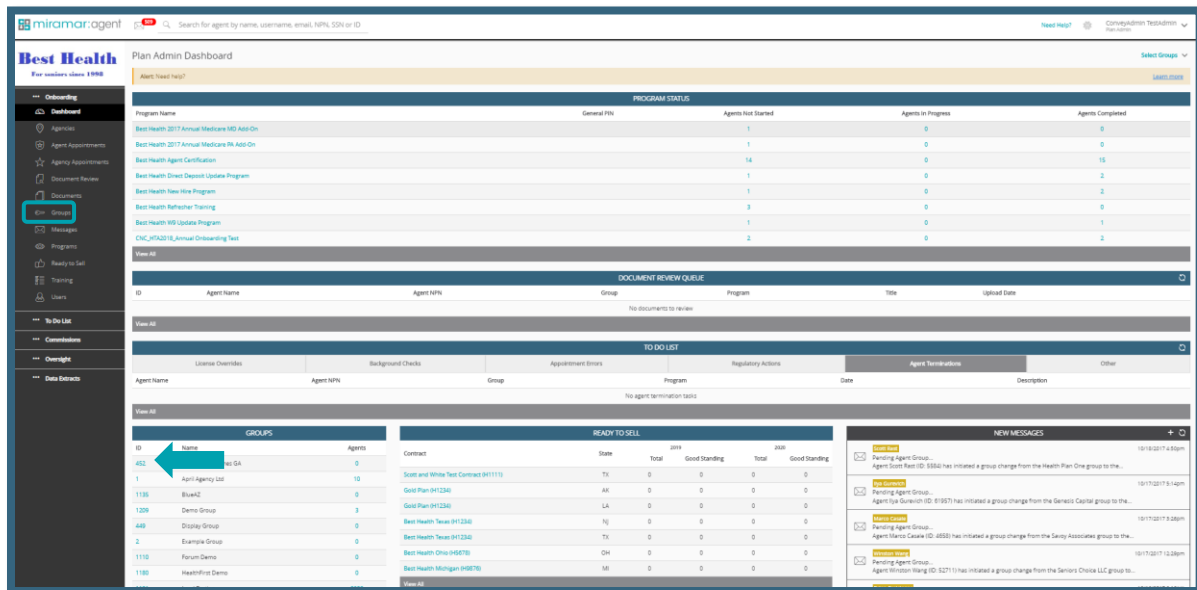


## GROUPS

Groups are the way you categorize your agents, and every agent associated with your plan must be assigned a group. Groups are important because they can help determine different pathways in your plan's onboarding programs.

Your groups will be set up during your initial implementation with your Plan Manager. To add a new group or edit an existing group, reach out to your assigned Plan Manager.

To manage your groups, click **Groups** from the Onboarding menu on the left side of your screen; or from your dashboard, click **View All** under the Groups widget to open the Group Management index.



The screenshot shows the 'Plan Admin Dashboard' for 'Best Health'. The left sidebar has a 'Groups' link highlighted. The main content area displays several sections:

- PROGRAM STATUS**: A table showing program details and agent counts.
 

Program Name	General PIN	Agents Not Started	Agents In Progress	Agents Completed
Best Health 2017 Annual Medicare MD Add-On		1	0	0
Best Health 2017 Annual Medicare RN Add-On		1	0	0
Best Health Agent Certification		14	0	15
Best Health Direct Deposit Update Program		1	0	2
Best Health New Hire Program		1	0	2
Best Health Refresher Training		3	0	0
Best Health WG Update Program		1	0	1
CNC_HF2017 Annual Onboarding Test		2	0	2
- DOCUMENT REVIEW QUEUE**: A table showing documents to be reviewed.
 

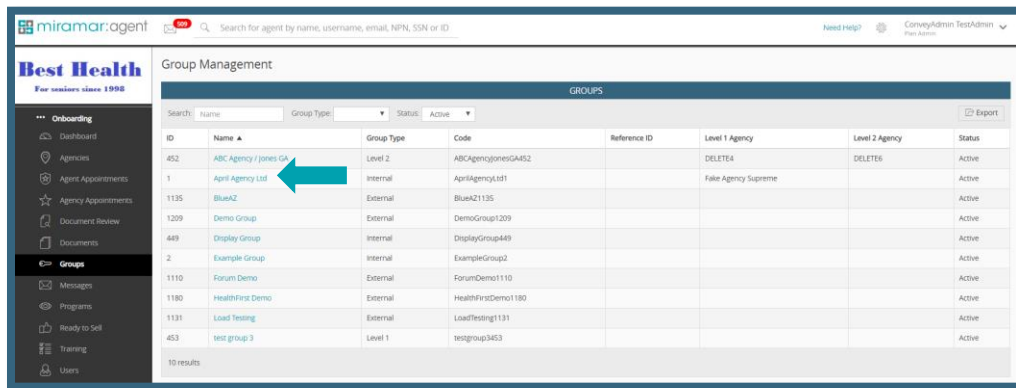
ID	Agent Name	Agent NPI	Group	Program	Title	Upload Date
No documents to review						
- TO DO LIST**: A table showing tasks to be completed.
 

License Overrides	Background Checks	Appointment Errors	Regulatory Actions	Agent Terminations	Other
No agent termination tasks					
- GROUPS**: A table showing the list of groups.
 

ID	Name	Agents
452	Not GA	0
1	Apri Agency Ltd	10
1135	BlueAZ	0
1209	Demo Group	3
448	Display Group	0
2	Example Group	0
1110	Forum Demos	0
1180	Headfirst Demo	0
- READY TO SELL**: A table showing agents ready to sell.
 

Contract	State	Total	2019	Good Standing	Total	2020	Good Standing
Scott and White Test Contract 9811175	TX	0	0	0	0	0	0
Gold Plan 9412345	AK	0	0	0	0	0	0
Gold Plan 9412345	LA	0	0	0	0	0	0
Best Health Texas 9412345	TX	0	0	0	0	0	0
Best Health Ohio 1456789	OH	0	0	0	0	0	0
Best Health Michigan 9876543	MI	0	0	0	0	0	0
- NEW MESSAGES**: A list of messages.
  - Pending Agent Group: Agent Scott Rast (ID: 5584) has initiated a group change from the Health Plan One group to the...
  - Pending Agent Group: Agent Lisa Gonzalez (ID: 61927) has initiated a group change from the Seniors Capital group to the...
  - Pending Agent Group: Agent David Casale (ID: 4885) has initiated a group change from the Seniors Associate group to the...
  - Pending Agent Group: Agent Winston Wang (ID: 52711) has initiated a group change from the Seniors Choice LLC group to the...

From the Group Management index, you're able to open individual records to view specific group setup information. To open a group, click on the *group name*.



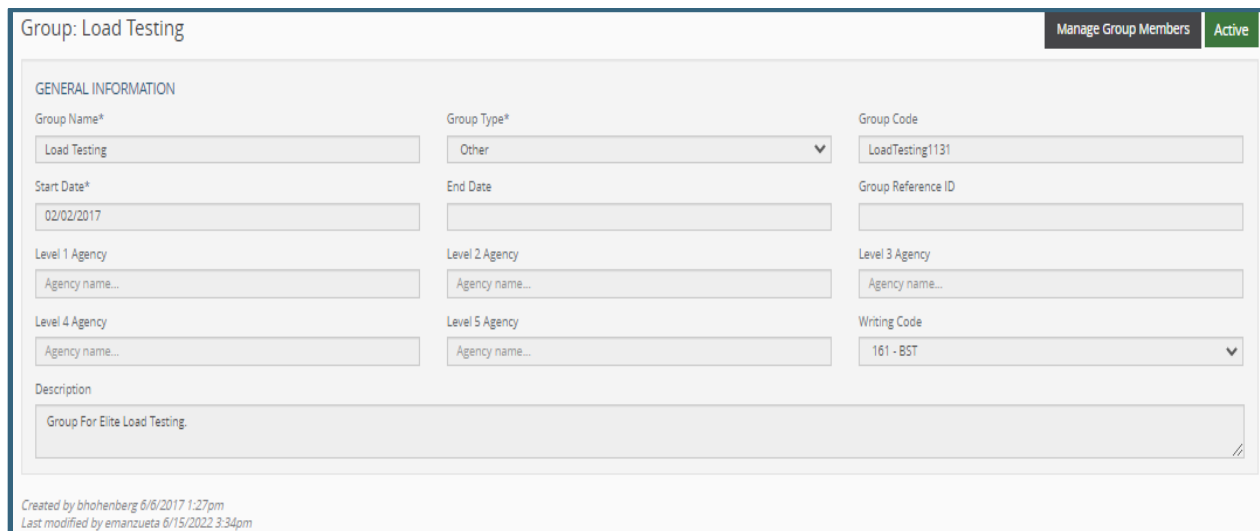
ID	Name	Group Type	Code	Reference ID	Level 1 Agency	Level 2 Agency	Status
452	ABC Agency / Jones GA	Level 2	ABCAgencyJonesGA452		DELETE4	DELETE6	Active
1	April Agency Ltd	Internal	AprilAgencyLtd1		Fake Agency Supreme		Active
1135	BlueAZ	External	BlueAZ1135				Active
1209	Demo Group	External	DemoGroup1209				Active
449	Display Group	Internal	DisplayGroup449				Active
2	Example Group	Internal	ExampleGroup2				Active
1110	Forum Demo	External	ForumDemo1110				Active
1180	HealthFirst Demo	External	HealthFirstDemo1180				Active
1131	Load Testing	External	LoadTesting1131				Active
453	test group 3	Level 1	testgroup3453				Active



**QUICK TIP:** Group Code is used for initiating group changes for an individual. If you are planning on initiating an individual group change, make sure to copy the code from the Group Management index or export it for easy reference.

Here you will be able to view general group information, including Group Code and Writing Code prefix. To view group members, initiate a batch upload, batch group change, or add a new agent, click into **Manage Group Members**.

To go back to the Group Management index, click **Cancel**.



Group: Load Testing
Manage Group Members
Active

GENERAL INFORMATION

Group Name\*
Load Testing

Group Type\*
Other

Group Code
LoadTesting1131

Start Date\*
02/02/2017

End Date

Group Reference ID

Level 1 Agency
Agency name...

Level 2 Agency
Agency name...

Level 3 Agency
Agency name...

Level 4 Agency
Agency name...

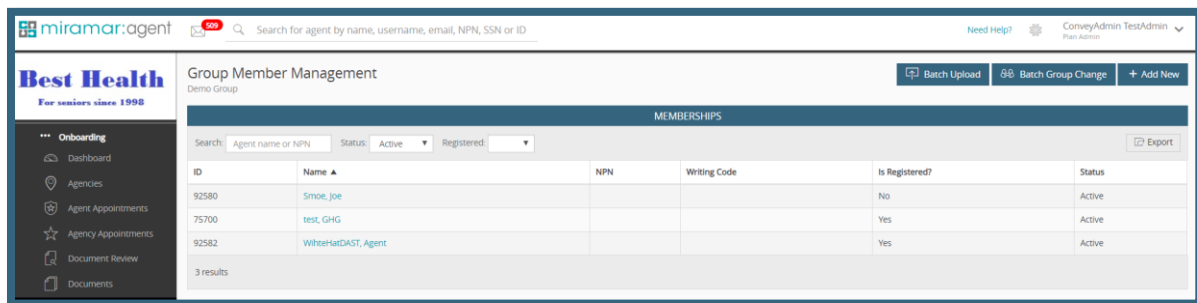
Level 5 Agency
Agency name...

Writing Code
161 - BST

Description
Group For Elite Load Testing.

Created by bhohenberg 6/6/2017 1:27pm  
Last modified by emanueta 6/15/2022 3:34pm

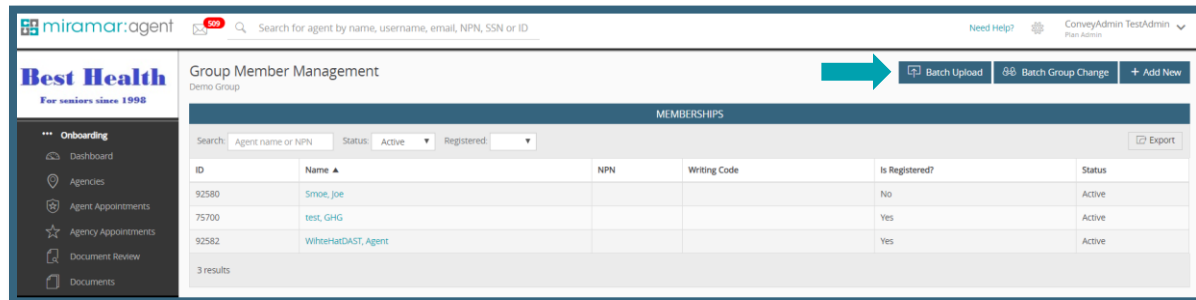
From the Group Member Management index for a group, you are able to view basic agent information and initiate an individual group change, initiate batch upload, batch group change, or add a new, single agent.



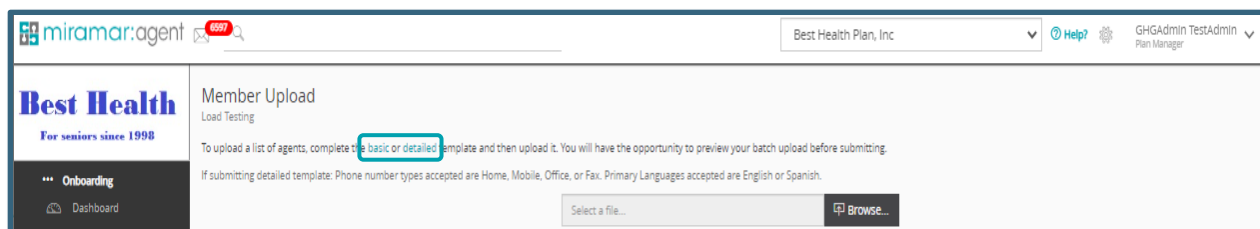
## How do I load an agent to a group?

### Batch File Upload

To upload multiple agents into a group, click into **Batch Upload** from the Group Member Management index.



After clicking into *Batch Upload*, you will be prompted to upload a list of agents using one of the provided templates. A template must be used when uploading a list of agents and can be downloaded by clicking into either the **basic** or **detailed** template links.



The **Basic Template** will require you to provide the Social Security Number (SSN), First Name, and Last Name of the individuals you wish to add to the group. National Producer Number (NPN) may also be included but is not required.

	A	B	C	D
1	SSN	NPN	First Name	Last Name
2				

The **Detailed Template** will require you to provide the SSN, First Name, and Last Name of the individuals you wish to add to the group. NPN, Address Line 1, Address Line 2, City, State, Zip, Phone Number, and Email may also be included but are optional.

	A	B	C	D	E	F	G	H	I	J	K
1	SSN	NPN	First Name	Last Name	Address Line 1	Address Line 2	City	State	Zip	Phone Number	Email
2											

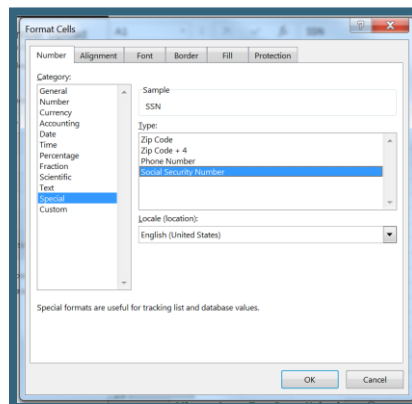
Once you have completed the required information on either the basic or detailed template, save the file to your documents, then upload it to Miramar:Agent by clicking **Browse**, selecting the file you just saved, and clicking **Open**.



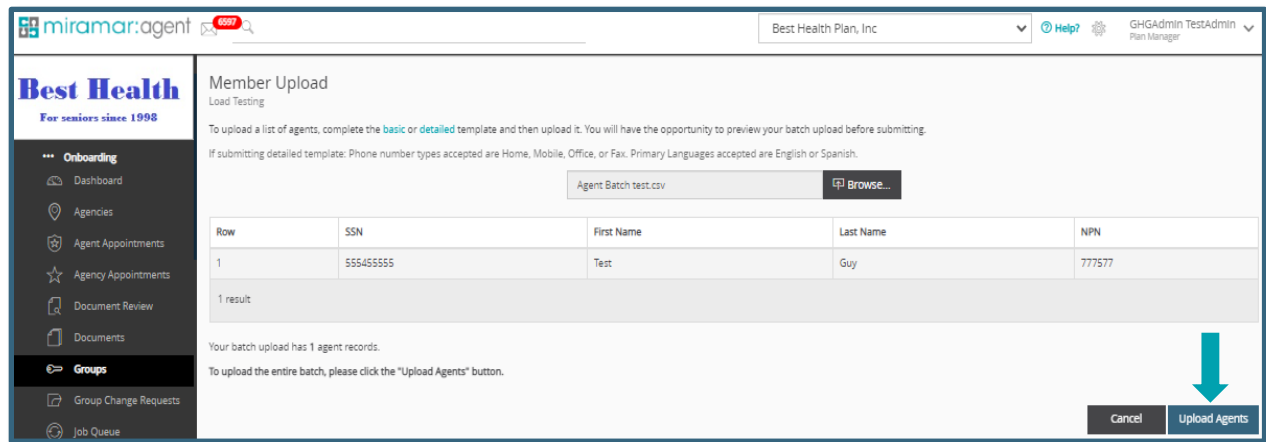
**NOTE:** The template format must be used, otherwise the file will error out. Files must also be saved in CSV (comma delimited) format in order to be uploaded.



**NOTE:** SSNs must be saved in SSN format. To format, highlight the column, right click, click **Format Cells**, then select **Special** under category. Click **OK** to save.



Once you have selected the file, the agent's information will populate on the same screen. If the information you have uploaded looks correct and there are no errors, select **Upload Agents** at the bottom right of your browser screen.



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**Member Upload**  
Load Testing

To upload a list of agents, complete the [basic](#) or [detailed](#) template and then upload it. You will have the opportunity to preview your batch upload before submitting.

If submitting detailed template: Phone number types accepted are Home, Mobile, Office, or Fax. Primary Languages accepted are English or Spanish.

Agent Batch test.csv

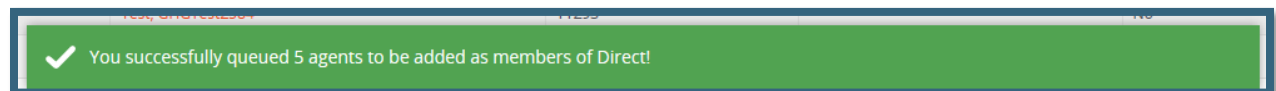
Row	SSN	First Name	Last Name	NPN
1	555455555	Test	Guy	777577

1 result

Your batch upload has 1 agent records.

To upload the entire batch, please click the "Upload Agents" button.

Upon successful upload, you will see a confirmation pop-up at the bottom of your browser screen.



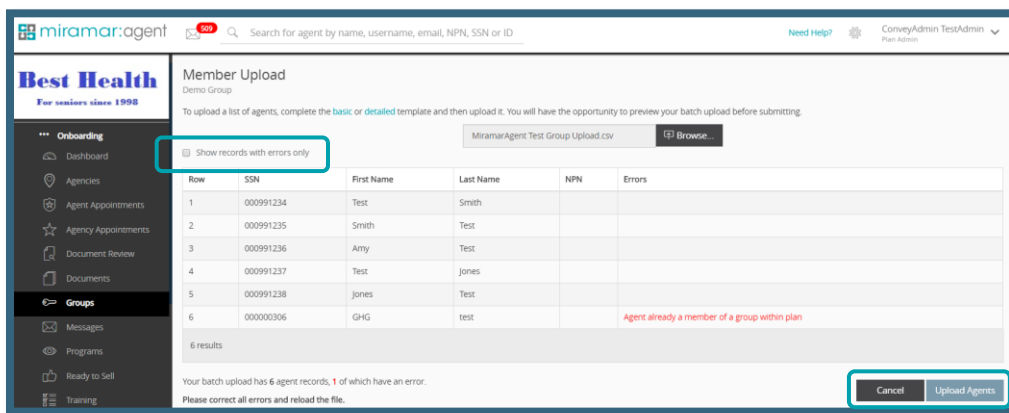


## Upload Errors

If there are any errors in the file, you will not be able to upload it until they have been corrected.

You will be able to review any errors from this same page. To easily view only the agents who were effected by errors, check the box next to **Show records with errors only**.

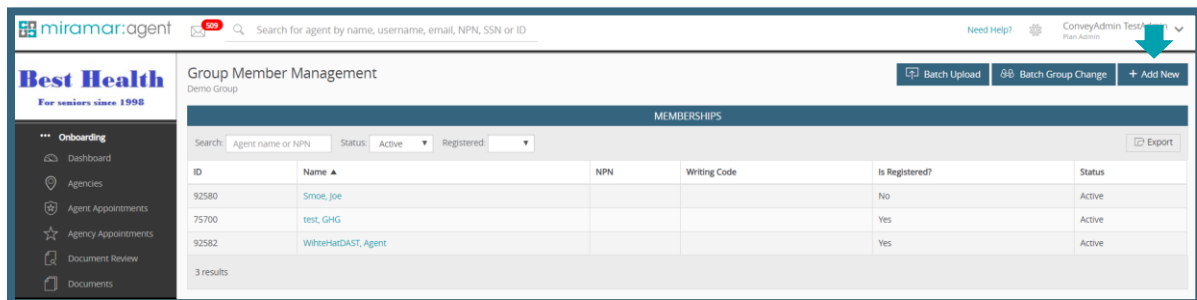
An explanation of the error will be in the last column in red font. Correct any issues in the file and re-upload.



Row	SSN	First Name	Last Name	NPN	Errors
1	000991234	Test	Smith		
2	000991235	Smith	Test		
3	000991236	Amy	Test		
4	000991237	Test	Jones		
5	000991238	Jones	Test		
6	000000306	GHG	test		Agent already a member of a group within plan

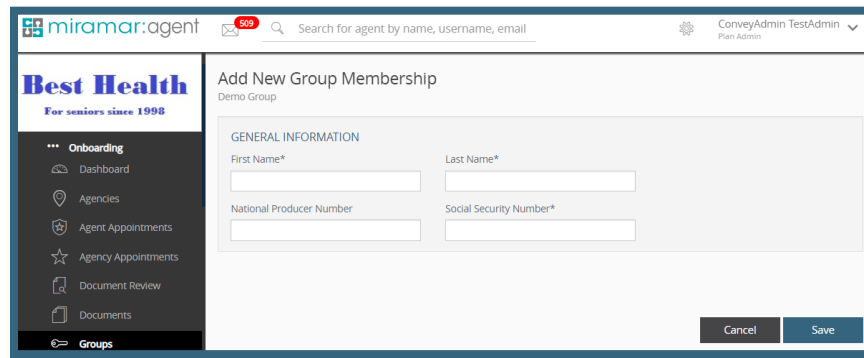
## Single Agent Add

To add a single agent to a group, click **Add New** at the top of the Group Member Management index.



ID	Name	NPN	Writing Code	Is Registered?	Status
92580	Smoe, Joe			No	Active
75700	test, GHG			Yes	Active
92582	WhitehatDAST, Agent			Yes	Active

You will be prompted to add the agent's First Name, Last Name, NPN, and SSN. All fields except NPN are required. Enter the required information and click **Save** to add the agent.



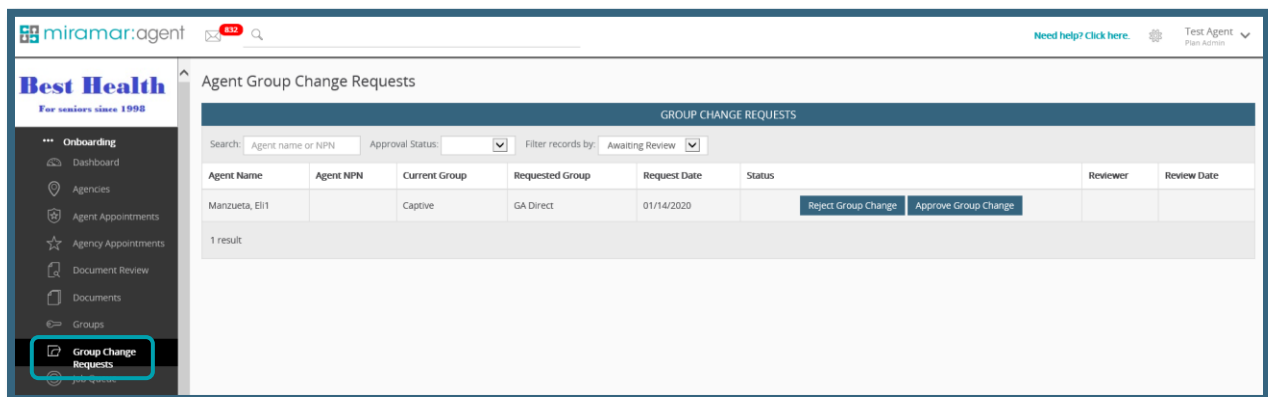
Upon successful enrollment of the agent to the group, you will see a confirmation banner at the bottom of your browser screen.



## How do I change an agent's group?

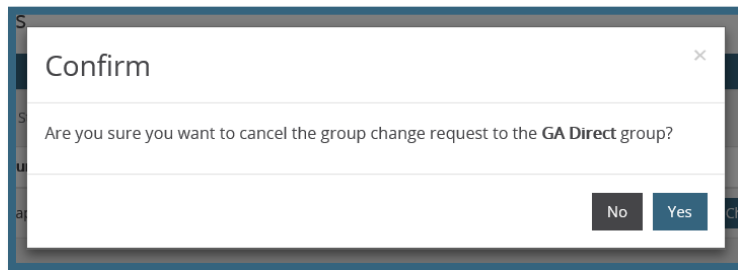
### Approve a Group Change Request

An agent can initiate a group change request from their profile and it will show up in your Group Change Request queue. Click into **Group Change Requests** from the Onboarding menu on the left side of your screen; or from your dashboard, click into an individual's name from the Group Change Request widget or click **View All**.



GROUP CHANGE REQUESTS							
Agent Name	Agent NPN	Current Group	Requested Group	Request Date	Status	Reviewer	Review Date
Manzueta, Eli		Captive	GA Direct	01/14/2020	Awaiting Review		

If you do not want to allow the agent to change groups, click **Reject Group Change**. You will be prompted to confirm the rejection.

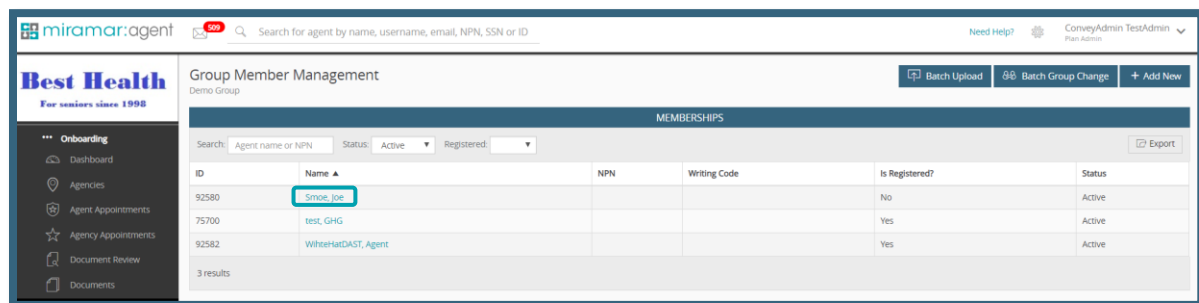


If you want to allow the agent to change groups, click **Approve Group Change**. You will be prompted to confirm the approval by clicking **Finalize**. If you have a different Writing Code structure for the new group, then click the checkbox next to *Issue New Writing Code*? If the writing code should stay the same, do not check this box.

### Individual Group Change

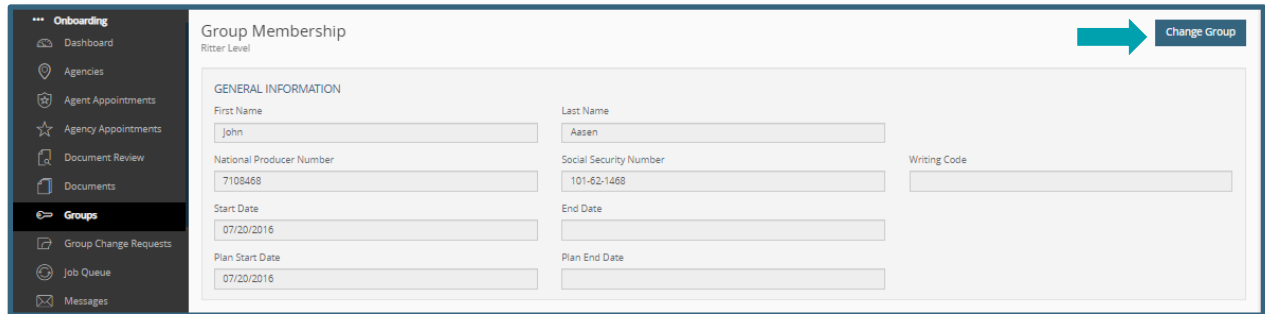
To view basic agent information and/or initiate an individual group change, click into the *agent's name* from the Group Member Management index.

You can also click **Cancel** to return to the group information page.



Once you have clicked into the agent's name, you will see their basic information including writing code and group start and end dates. To initiate a group change for this agent, click **Change Group** at the top right corner of the browser screen.

Click **Cancel** to return to the Group Member Management index.

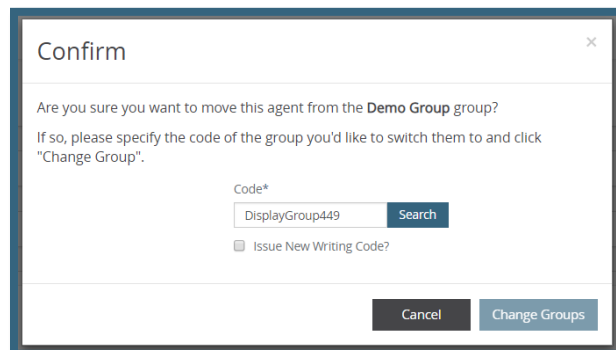


Once you have clicked *Change Group*, a confirmation box will pop up on the screen. You will need to enter the *Group Code* for the group to which you are wanting to change. This is found on the Group Management index.

You have the option to issue a new writing code by checking the box next to **Issue new writing code?** If writing codes are group specific and you want to issue a new writing code, check this box. If all groups use the same prefix, then you may not want to issue a new writing code.

Enter the Group Code and click **Search**.

Click **Cancel** at any time to return to the agent information page.



If the group code you entered is valid, you will get the confirmation in green. Click **Change Groups** to complete the group change.

Confirm

Are you sure you want to move this agent from the **Demo Group** group?

If so, please specify the code of the group you'd like to switch them to and click "Change Group".

Code\*

DisplayGroup449

Search

☐ Issue New Writing Code?
 ☐ Keep Existing Writing Code?

The specified code matches the **Display Group** group.

Click 'Change Groups' to complete the group change.

Cancel

Change Groups

If the group code you entered is invalid, you will get the error message in red below. Refer to the Group Management index to confirm the group code.

Confirm

Are you sure you want to move this agent from the **Demo Group** group?

If so, please specify the code of the group you'd like to switch them to and click "Change Group".

Code\*

DisplayGroup9

Search

☐ Issue New Writing Code?

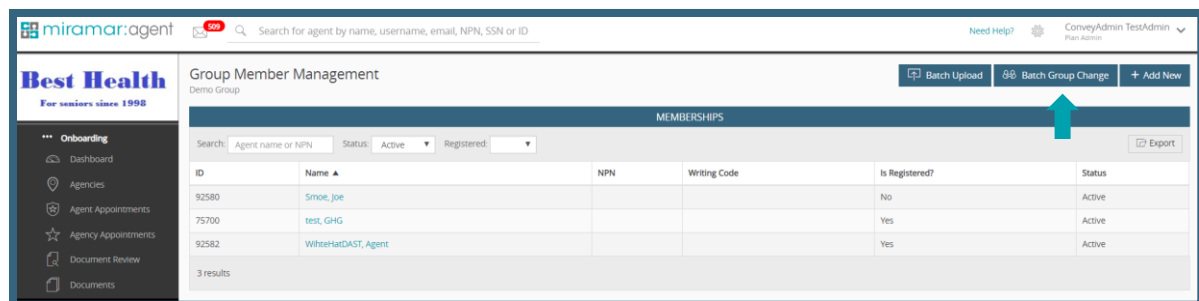
A group could not be found matching the specified code.

Cancel

Change Groups

### Batch Group Change

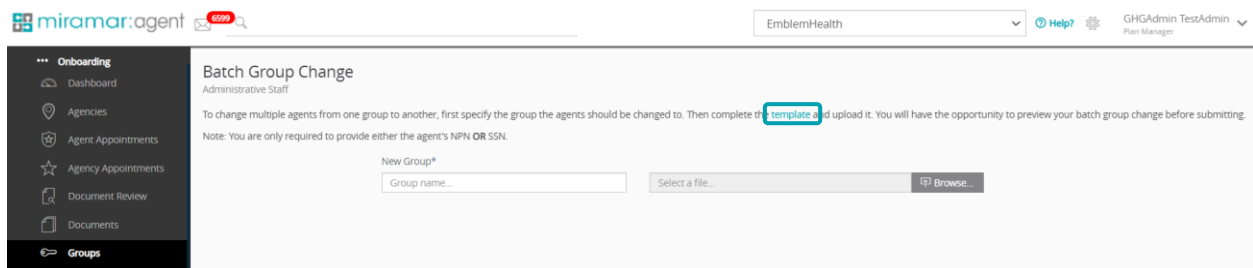
To initiate a batch group change, click into **Batch Group Change** from the Group Member Management index.




The screenshot shows the 'Group Member Management' page for the 'Demo Group'. The 'Batch Group Change' button is highlighted with a red arrow. The page includes a search bar, a table of members, and a sidebar with navigation options.

ID	Name	NPN	Writing Code	Is Registered?	Status
92580	Smoe, Joe			No	Active
75700	test, GHG			Yes	Active
92582	WhiteHatCAST, Agent			Yes	Active

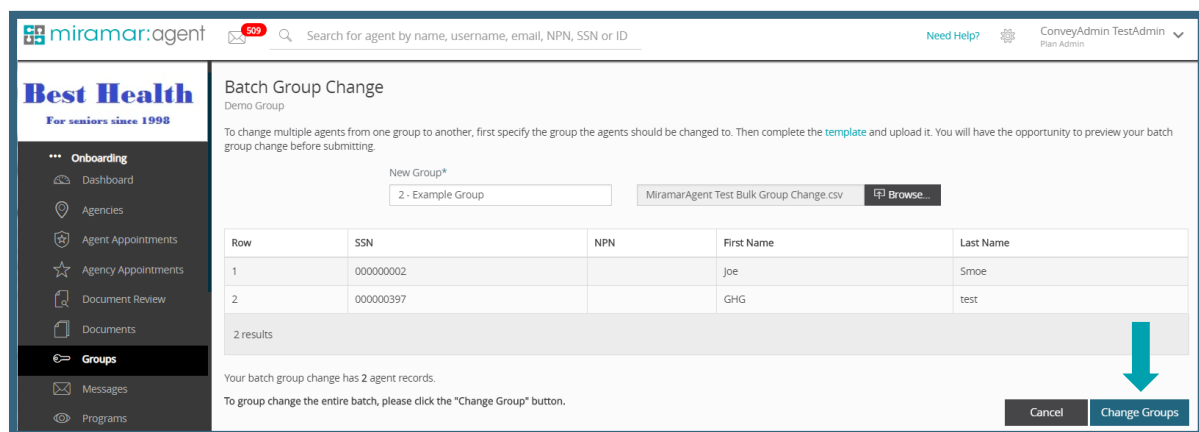
After clicking into *Batch Group Change*, you will be prompted to upload a list of agents using the provided template, which can be downloaded by clicking into the **template** link. You will also need to select the group to which you wish to change. Start typing the group's name under *New Group*, and options will begin to auto-populate.



The template will require you to provide SSN, and the NPN is optional but recommended. Once you have completed the required information on the upload template, save the file to your documents, then upload it to Miramar:Agent by clicking **Browse**.

 **NOTE:** The template format must be used, otherwise the file will error out. Files must also be saved in CSV (comma delimited) format in order to be uploaded.

Once you have selected the file, the agent's information will populate on the same screen. If the information you have uploaded looks correct and there are no errors, select **Change Groups** at the bottom right.



Row	SSN	NPN	First Name	Last Name
1	000000002		Joe	Smoe
2	000000397		GHG	test

2 results

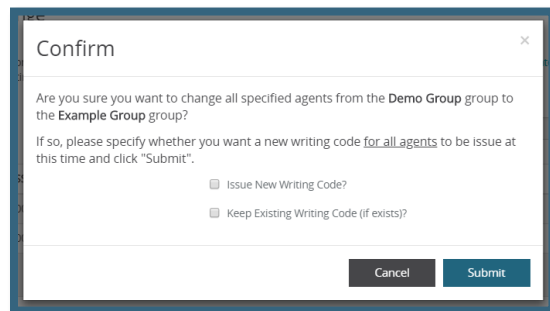
Your batch group change has 2 agent records.  
To group change the entire batch, please click the "Change Group" button.

Cancel Change Groups

Once you have clicked *Change Group*, a confirmation box will pop up on the screen. You will have the option to issue a new writing code to all agents by checking the box next to **Issue New Writing Code?**

If writing codes are group specific and you want to issue a new writing code, check this box. If all groups use the same prefix, then you may not want to issue a new writing code.

To confirm the group change, click **Submit**.



A confirmation dialog box titled "Confirm" with a close button (X) in the top right corner. The text inside reads: "Are you sure you want to change all specified agents from the **Demo Group** group to the **Example Group** group?" followed by "If so, please specify whether you want a new writing code for all agents to be issue at this time and click 'Submit'." Below this text are two checkboxes: "Issue New Writing Code?" and "Keep Existing Writing Code (if exists)". At the bottom right are two buttons: "Cancel" and "Submit".

Upon successful completion of the bulk group change, you will see a confirmation banner at the bottom of your browser screen.

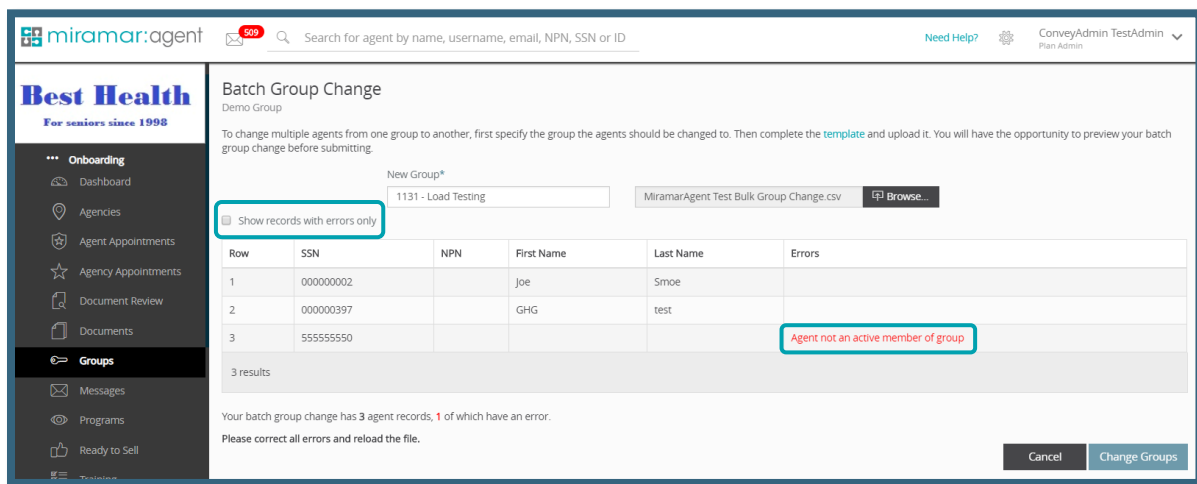


## Upload Errors

If there are any errors in the file, you will not be able to upload it until they have been corrected.

You will be able to review any errors from this same page. To easily view only the agents who have errors, check the box next to **Show records with errors only**.

An explanation of the error will be in the last column in red font. Correct any issues in the file and re-upload.



**miramar:agent** 509 Search for agent by name, username, email, NPN, SSN or ID

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**Batch Group Change**  
Demo Group

To change multiple agents from one group to another, first specify the group the agents should be changed to. Then complete the [template](#) and upload it. You will have the opportunity to preview your batch group change before submitting.

New Group\* 1131 - Load Testing MiramarAgent Test Bulk Group Change.csv [Browse...](#)

☒ Show records with errors only

Row	SSN	NPN	First Name	Last Name	Errors
1	000000002		Joe	Smoe	
2	000000397		GHG	test	
3	555555550				Agent not an active member of group

3 results

Your batch group change has 3 agent records, 1 of which have an error.  
Please correct all errors and reload the file.


[Cancel](#) [Change Groups](#)

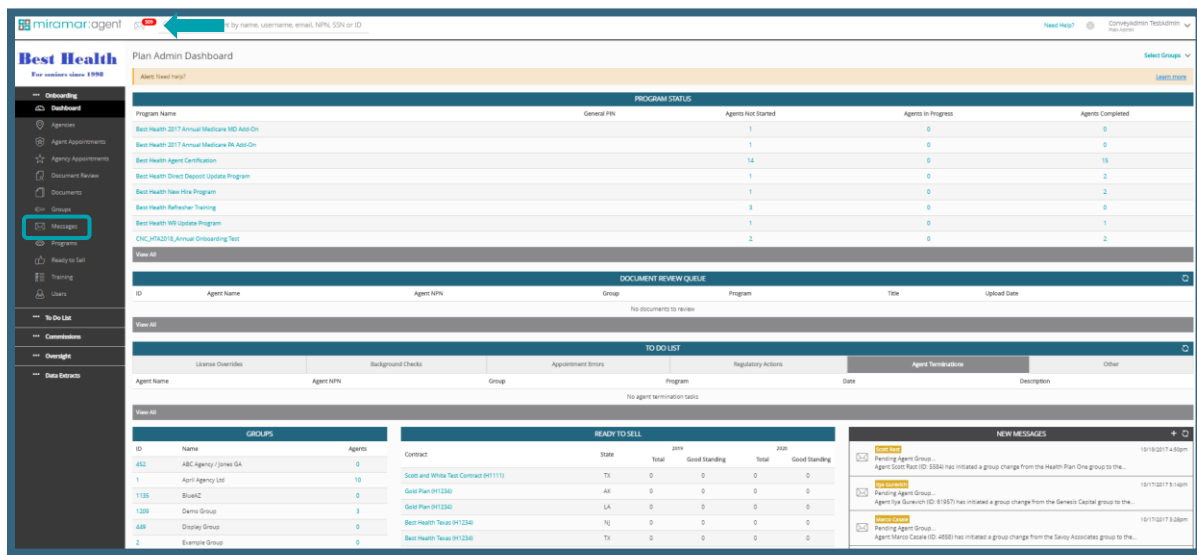
## MESSAGES

Messaging provides plan administrators an efficient way to communicate to agents through the system. The Messaging Center may be used to send messages to an individual, a group, or everyone enrolled in a specific program. Data is captured on messages sent through the system, which allows plans to capture and report confirmation of receipt.

If you have new or unread messages in your inbox, a red indicator will display next to the *envelope icon* at the top of your dashboard next to the agent search bar.



To open the Messaging Center, click **Messages** from the Onboarding menu on the left side of your screen; or to access from your dashboard, click on the *envelope icon*  located at the top of your screen next to the agent search bar.



**PROGRAM STATUS**

Program Name	General PIN	Agents Not Started	Agents In Progress	Agents Completed
Best Health 2017 Annual Medicare MD Add-On		1	0	0
Best Health 2017 Annual Medicare BA Add-On		1	0	0
Best Health Agent Certification		14	0	16
Best Health Direct Deposit Update Program		1	0	2
Best Health New Hire Program		1	0	2
Best Health Refresher Training		3	0	0
Best Health WS Update Program		1	0	1
CNC#72018 Annual Onboarding Test		2	0	2

**DOCUMENT REVIEW QUEUE**

ID	Agent Name	Agent NPN	Group	Program	Title	Upload Date
No documents to review						

**TO DO LIST**

Agent Name	License Overrides	Background Checks	Appointment Errors	Regulatory Actions	Agent Terminations	Other
No agent termination tasks						

**GROUPS**

ID	Name	Agents
462	ABC Agency / Jones GA	0
1	Apri Agency Ltd	10
1135	BlueAZ	0
1209	Dennis Group	3
445	Display Group	0
2	Example Group	0

**READY TO SELL**

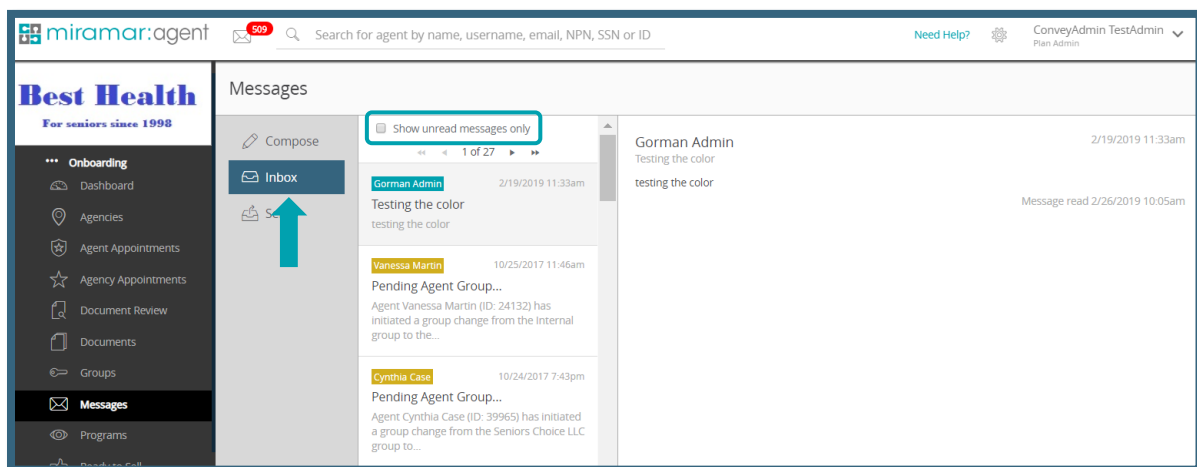
Contract	State	Total	Good Standing	Total	Good Standing
Scott and White Test Contract (941111)	TX	0	0	0	0
Gold Plan (941330)	AK	0	0	0	0
Gold Plan (941330)	LA	0	0	0	0
Best Health Texas (941234)	NJ	0	0	0	0
Best Health Texas (941234)	TX	0	0	0	0

**NEW MESSAGES**

- Pending Agent Group...**  
Agent Scott Ross (ID: 5556) has initiated a group change from the Health Plan One group to the...  
10/19/2017 4:30pm
- Pending Agent Group...**  
Agent Lisa Buchanan (ID: 81857) has initiated a group change from the Dennis Capital group to the...  
10/17/2017 9:40pm
- Pending Agent Group...**  
Agent Dennis Daniels (ID: 4455) has initiated a group change from the Seniors Choice group to the...  
10/17/2017 9:40pm

Once you have opened the messaging center, you will view your Inbox. Unread messages will be marked with a red flag in the top left corner of the message summary. To view only unread messages, check the box next to **Show unread messages only**.

After you have clicked into a message, it will be marked as read and will record the time and date you opened the message. You can also view sent messages by clicking into the **Sent** folder to the left of the messaging center.



**Messages**

☒ Show unread messages only

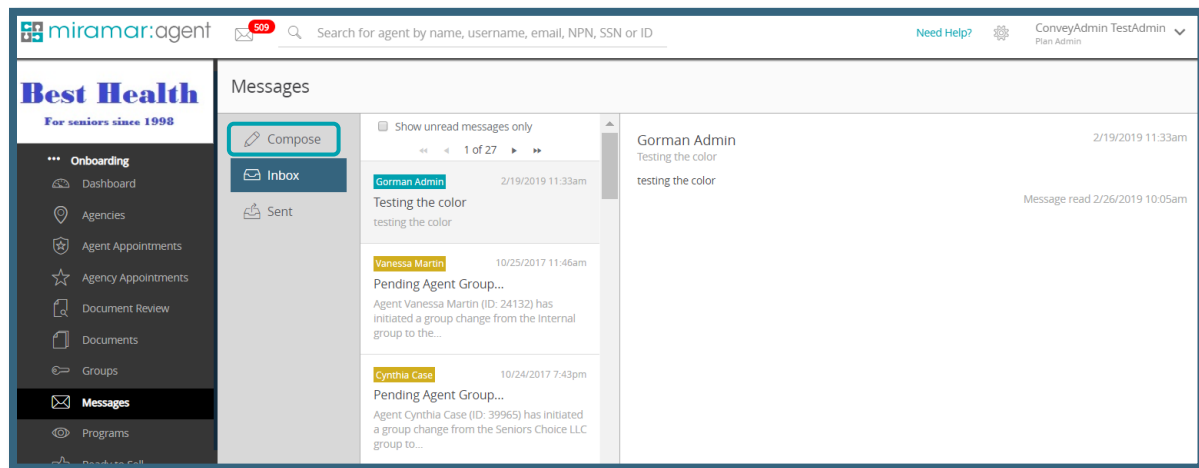
**Inbox**

- Gorman Admin** 2/19/2019 11:33am  
Testing the color  
testing the color
- Vanessa Martin** 10/25/2017 11:46am  
Pending Agent Group...  
Agent Vanessa Martin (ID: 24132) has initiated a group change from the Internal group to the...
- Cynthia Case** 10/24/2017 7:43pm  
Pending Agent Group...  
Agent Cynthia Case (ID: 39965) has initiated a group change from the Seniors Choice LLC group to...

**Gorman Admin** 2/19/2019 11:33am  
Testing the color  
testing the color  
Message read 2/26/2019 10:05am

## How do I send a message?

To send a message, click **Compose** from the messaging center; or from your dashboard, click the **+** at the top of the *New Messages* widget.



To compose a message, select the recipient type: *Individual*, *Group*, or *Program*. Once you have selected the recipient type, you will be able to search for them in the *To:* text box.

If you select *Individual*, you will need to choose whether the recipient is an agent or plan administrator. From there, you may search by name, email address, or NPN.

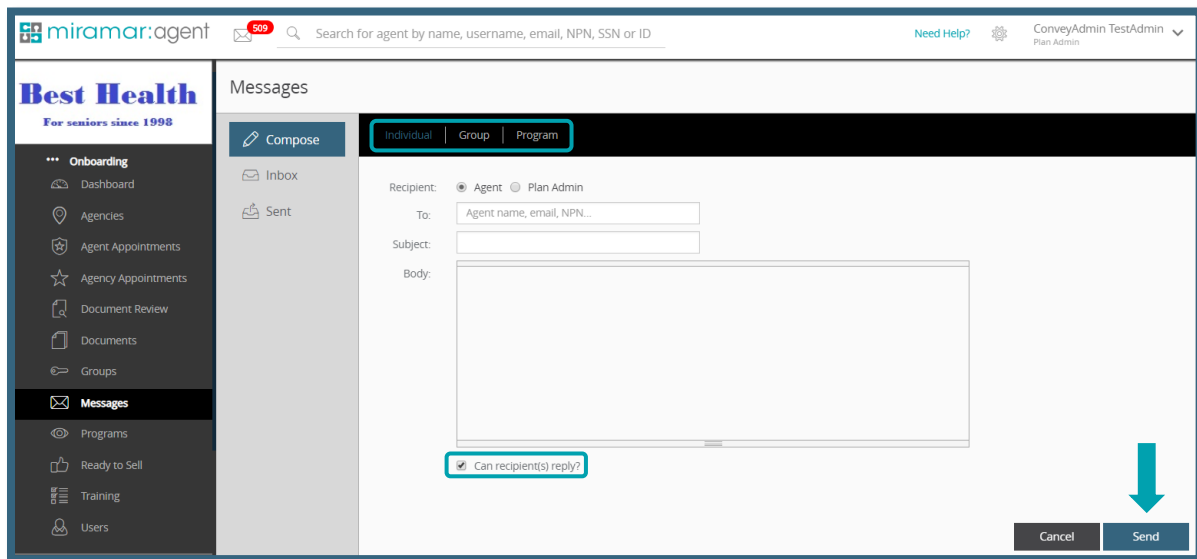
If you select *Group* or *Program*, start typing the name of the group or program. To aid in your search, the group or program name will begin to autofill using information already contained in Miramar:Agent.

To complete your message, add the subject and body of the message.



**QUICK TIP:** The system default allows recipients to reply to your messages. To send a message and prevent replies, deselect **Can recipient(s) reply?** at the bottom left of the message.

When you are ready to send your message, click **Send** in the bottom right side of the screen.



**miramar:agent** 500 Search for agent by name, username, email, NPN, SSN or ID Need Help? ConveyAdmin TestAdmin Plan Admin

**Best Health**  
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**Messages**

**Compose** Individual Group Program

Recipient: ☐ Agent ☐ Plan Admin

To:

Subject:

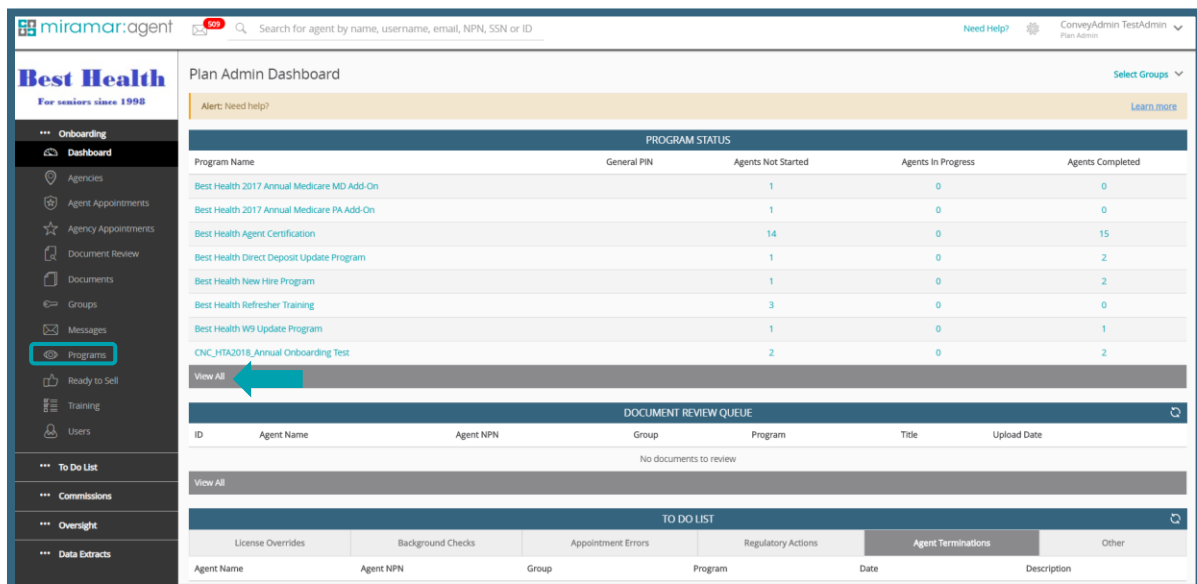
Body:

☒ Can recipient(s) reply?

**Cancel** **Send**

## PROGRAMS

To manage your Programs, click the **Programs** icon in the Onboarding Menu to the left of the screen; or from your dashboard, click **View All** under the *Program Status* widget.



**miramar:agent** 500 Search for agent by name, username, email, NPN, SSN or ID Need Help? ConveyAdmin TestAdmin Plan Admin

**Best Health**  
For seniors since 1998

**Plan Admin Dashboard** Select Groups

**PROGRAM STATUS**

Program Name	General PIN	Agents Not Started	Agents In Progress	Agents Completed
Best Health 2017 Annual Medicare MD Add-On		1	0	0
Best Health 2017 Annual Medicare PA Add-On		1	0	0
Best Health Agent Certification		14	0	15
Best Health Direct Deposit Update Program		1	0	2
Best Health New Hire Program		1	0	2
Best Health Refresher Training		3	0	0
Best Health W9 Update Program		1	0	1
CNC_HTA2018_Annual Onboarding Test		2	0	2

**View All**

**DOCUMENT REVIEW QUEUE**

ID	Agent Name	Agent NPN	Group	Program	Title	Upload Date
No documents to review						

**View All**

**TO DO LIST**

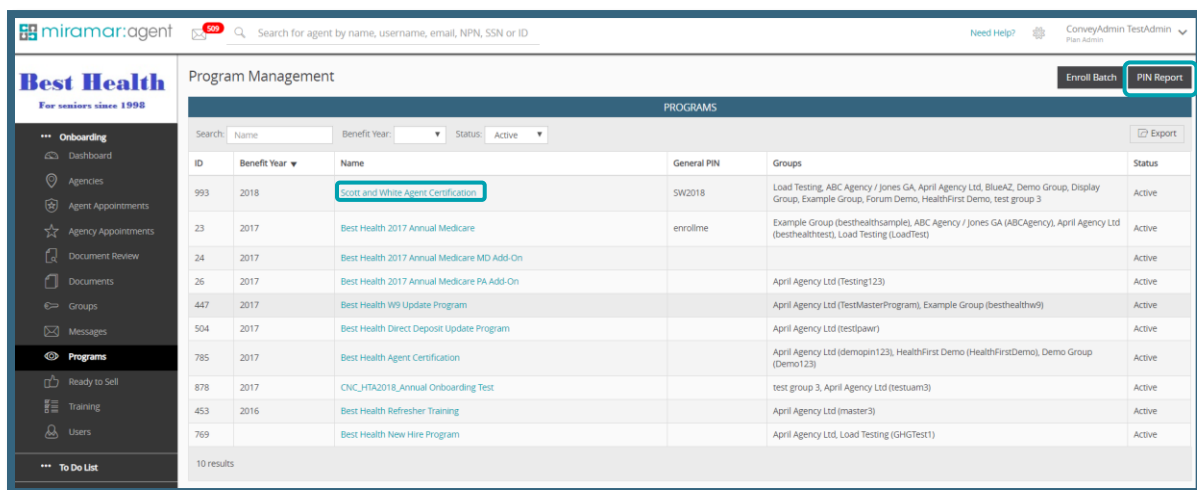
License Overrides	Background Checks	Appointment Errors	Regulatory Actions	Agent Terminations	Other
Agent Name	Agent NPN	Group	Program	Date	Description

Once you have clicked into *Programs* or *View All*, you will be taken to your Program Management index. To pull a report of all program registration PIN codes, click **PIN Report** at the top right of the browser screen.



**NOTE:** The *General PIN* listed in the Programs index can be used for any agent who is already associated to your plan. Using a group-specific PIN is only required upon initial registration.

To view specific program information, including group-specific PIN codes and notification settings, or to view program agents or enroll agents, click into the *program name*.

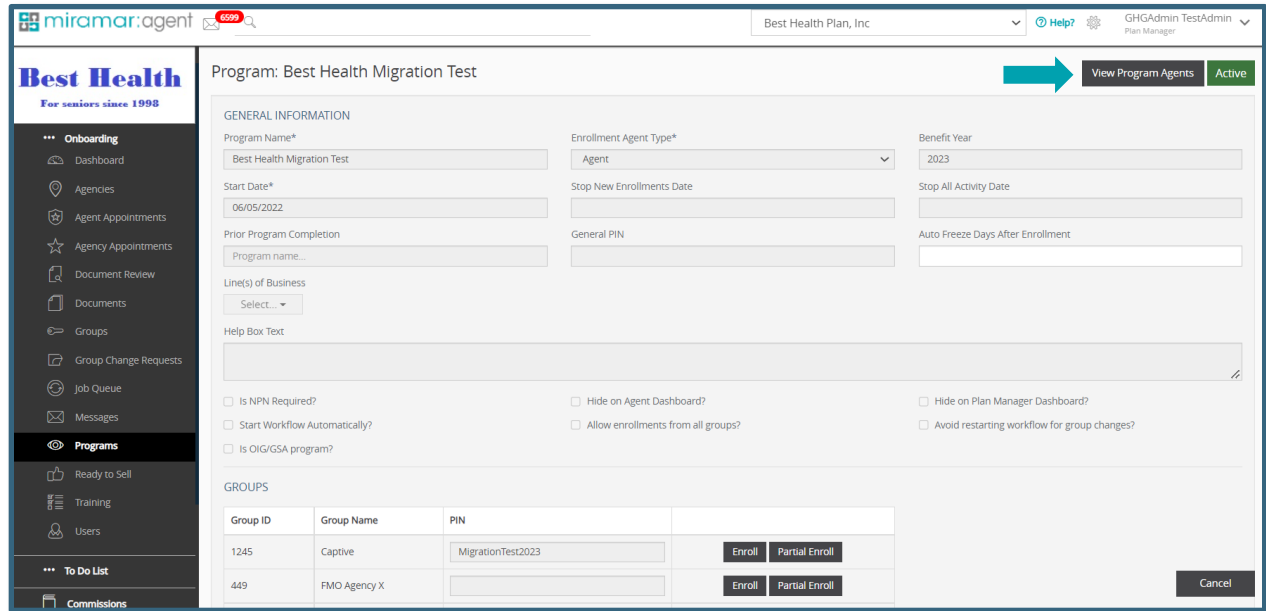


ID	Benefit Year	Name	General PIN	Groups	Status
993	2018	Scott and White Agent Certification	SW2018	Load Testing, ABC Agency / Jones GA, April Agency Ltd, BlueAZ, Demo Group, Display Group, Example Group, Forum Demo, HealthFirst Demo, test group 3	Active
23	2017	Best Health 2017 Annual Medicare	enrollme	Example Group (besthealthsamples), ABC Agency / Jones GA (ABCAGENCY), April Agency Ltd (besthealthtest), Load Testing (LoadTest)	Active
24	2017	Best Health 2017 Annual Medicare MD Add-On			Active
26	2017	Best Health 2017 Annual Medicare PA Add-On		April Agency Ltd (Testing123)	Active
447	2017	Best Health W9 Update Program		April Agency Ltd (TestMasterProgram), Example Group (besthealthw9)	Active
504	2017	Best Health Direct Deposit Update Program		April Agency Ltd (testpawr)	Active
785	2017	Best Health Agent Certification		April Agency Ltd (demopin123), HealthFirst Demo (HealthFirstDemo), Demo Group (Demo123)	Active
878	2017	CNC_HTA2018_Annual Onboarding Test		test group 3, April Agency Ltd (testuam3)	Active
453	2016	Best Health Refresher Training		April Agency Ltd (master3)	Active
769		Best Health New Hire Program		April Agency Ltd, Load Testing (GHGTest1)	Active

Here you will be able to view general program setup information, including groups and their specific PIN codes, and notification settings. Programs are set up during your annual configuration with your PM. To add a new program or edit an existing program, reach out to your assigned PM.

To view all agents enrolled in the program and their status, click **View Program Agents** in the top right corner of the browser screen.

To learn how to enroll agents into a program, continue reading.



**Program: Best Health Migration Test**

**GENERAL INFORMATION**

Program Name\*  Enrollment Agent Type\*  Benefit Year

Start Date\*  Stop New Enrollments Date  Stop All Activity Date

Prior Program Completion  General PIN

Auto Freeze Days After Enrollment

Line(s) of Business

Help Box Text

☐ Is NPN Required? ☐ Hide on Agent Dashboard? ☐ Hide on Plan Manager Dashboard?

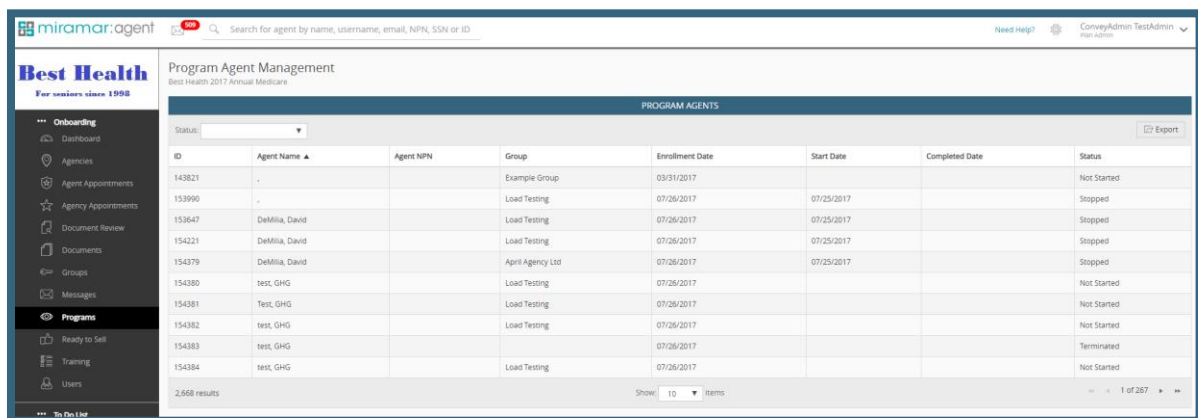
☐ Start Workflow Automatically? ☐ Allow enrollments from all groups? ☐ Avoid restarting workflow for group changes?

☐ Is OIG/GSA program?

**GROUPS**

Group ID	Group Name	PIN	Enroll	Partial Enroll
1245	Captive	MigrationTest2023	<input type="button" value="Enroll"/>	<input type="button" value="Partial Enroll"/>
449	FMO Agency X		<input type="button" value="Enroll"/>	<input type="button" value="Partial Enroll"/>

From the Program Agent Management index, you can view enrollment date, start date, completed date, and the status of each agent enrolled into the program.



**Program Agent Management**

Best Health 2017 Annual Medicare

**PROGRAM AGENTS**

Status:

ID	Agent Name	Agent NPN	Group	Enrollment Date	Start Date	Completed Date	Status
143821	-		Example Group	03/31/2017			Not Started
153990	-		Load Testing	07/26/2017	07/25/2017		Stopped
153647	DeMilia, David		Load Testing	07/26/2017	07/25/2017		Stopped
154221	DeMilia, David		Load Testing	07/26/2017	07/25/2017		Stopped
154379	DeMilia, David		Apri Agency Ltd	07/26/2017	07/25/2017		Stopped
154380	test, GHG		Load Testing	07/26/2017			Not Started
154381	Test, GHG		Load Testing	07/26/2017			Not Started
154382	test, GHG		Load Testing	07/26/2017			Not Started
154383	test, GHG			07/26/2017			Terminated
154384	test, GHG		Load Testing	07/26/2017			Not Started

2,668 results

Show 10 items

1 of 267

## How do I enroll agents into a program?

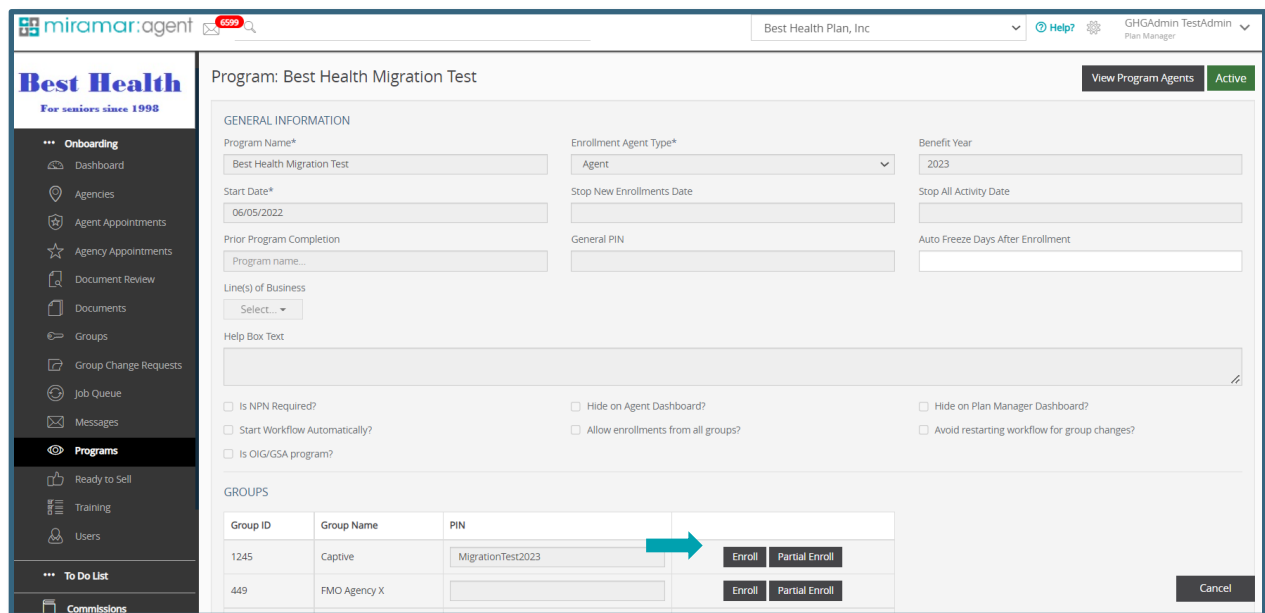
To enroll agents into a program, start by clicking into the *program name* from the Program Management index or from the programs widget on your dashboard.

### Full Group Enrollment

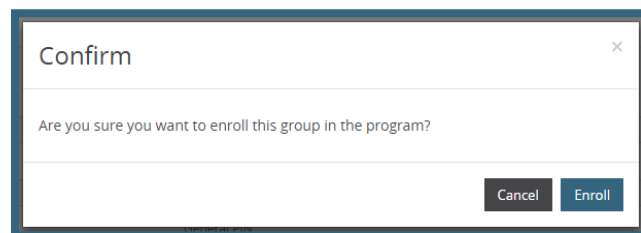
To enroll every agent associated to an individual group, click **Enroll** next to the group name you are wishing to enroll. This will enroll all current and future agents associated with this group.



**IMPORTANT NOTE:** Once you enroll an agent, you cannot un-enroll them. Please be mindful of this when enrolling agents.

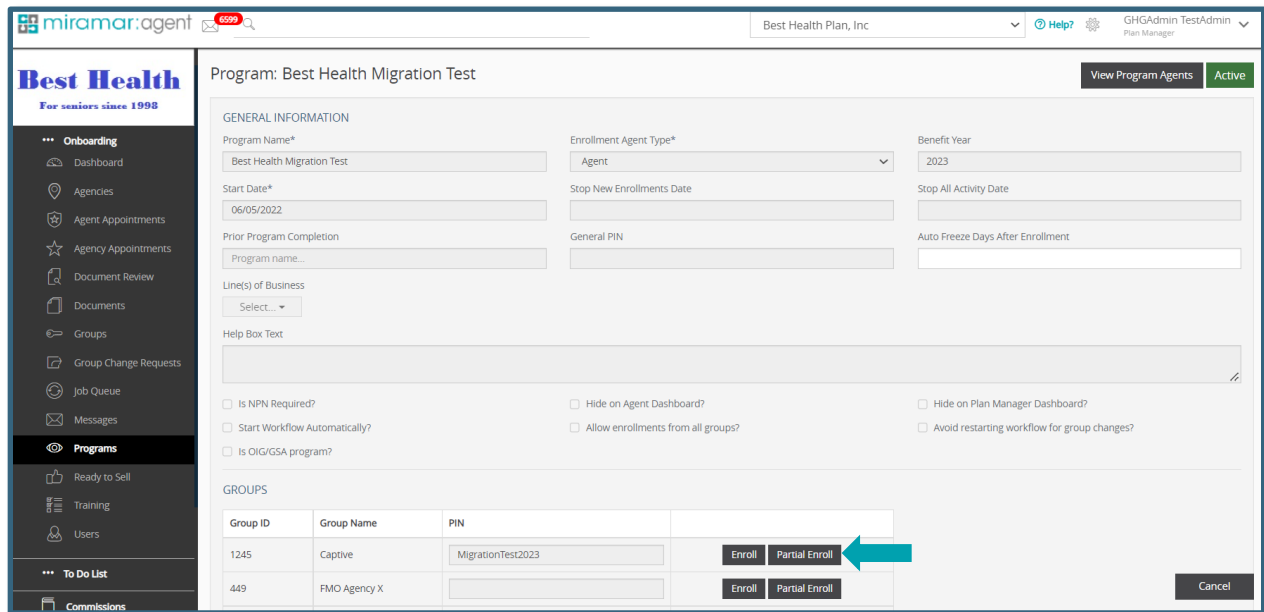


A pop-up will appear asking you to confirm you want to enroll all agents into the group.



## Partial Enrollment

To enroll only certain individuals from a group, select **Partial Enroll** next to the group name from which you wish to enroll agents.



Program: Best Health Migration Test

GENERAL INFORMATION

Program Name\*  
Best Health Migration Test

Enrollment Agent Type\*  
Agent

Benefit Year  
2023

Start Date\*  
06/05/2022

Stop New Enrollments Date

Stop All Activity Date

Prior Program Completion  
Program name...

General PIN

Auto Freeze Days After Enrollment

Line(s) of Business  
Select...

Help Box Text

☐ Is NPN Required?  
☐ Start Workflow Automatically?  
☐ Is OIG/GSA program?

☐ Hide on Agent Dashboard?  
☐ Allow enrollments from all groups?

☐ Hide on Plan Manager Dashboard?  
☐ Avoid restarting workflow for group changes?

GROUPS

Group ID	Group Name	PIN	Enroll	Partial Enroll
1245	Captive	MigrationTest2023	Enroll	Partial Enroll
449	FMO Agency X		Enroll	Partial Enroll

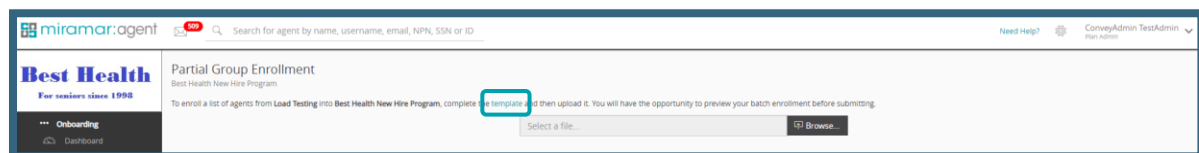
Cancel

After clicking into *Partial Enroll*, you will be prompted to upload a list of agents using the provided template, which can be downloaded by clicking into the **template** link.

The template will require you to provide SSN, and NPN is optional. Once you have completed the required information on the upload template, save the file to your documents, then upload it to Miramar:Agent by clicking **Browse**.



**NOTE:** The template format must be used, otherwise the file will error out. Files must also be saved in CSV (comma delimited) format in order to be uploaded.



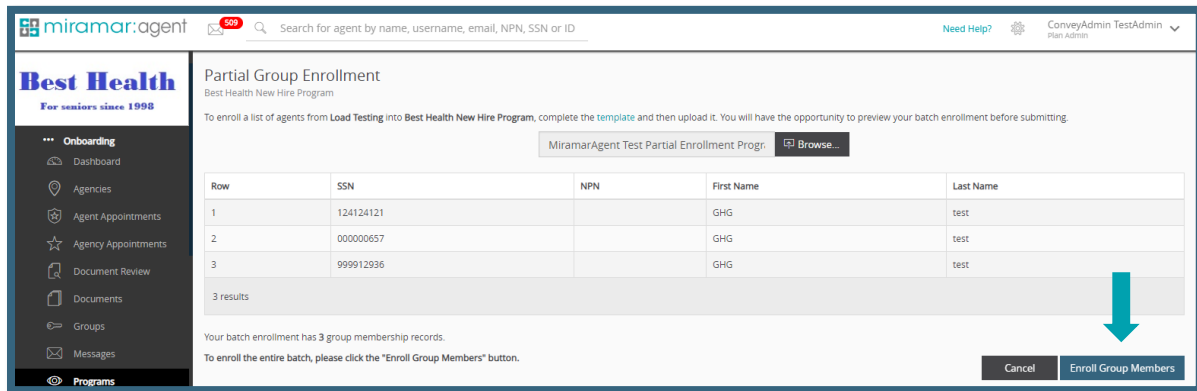
Partial Group Enrollment

Best Health New Hire Program

To enroll a list of agents from Load Testing into Best Health New Hire Program, complete the template and then upload it. You will have the opportunity to preview your batch enrollment before submitting.

Select a file... **Browse...**

Once you have selected the file, the agent's information will populate on the same screen. If the information you have uploaded looks correct and there are no errors, select **Enroll Group Members** at the bottom right.



**Partial Group Enrollment**  
Best Health New Hire Program

To enroll a list of agents from **Load Testing** into **Best Health New Hire Program**, complete the [template](#) and then upload it. You will have the opportunity to preview your batch enrollment before submitting.

MiramarAgent Test Partial Enrollment Progr. [Browse...](#)

Row	SSN	NPN	First Name	Last Name
1	124124121		GHG	test
2	000000657		GHG	test
3	999912936		GHG	test

3 results

Your batch enrollment has 3 group membership records.  
To enroll the entire batch, please click the "Enroll Group Members" button.

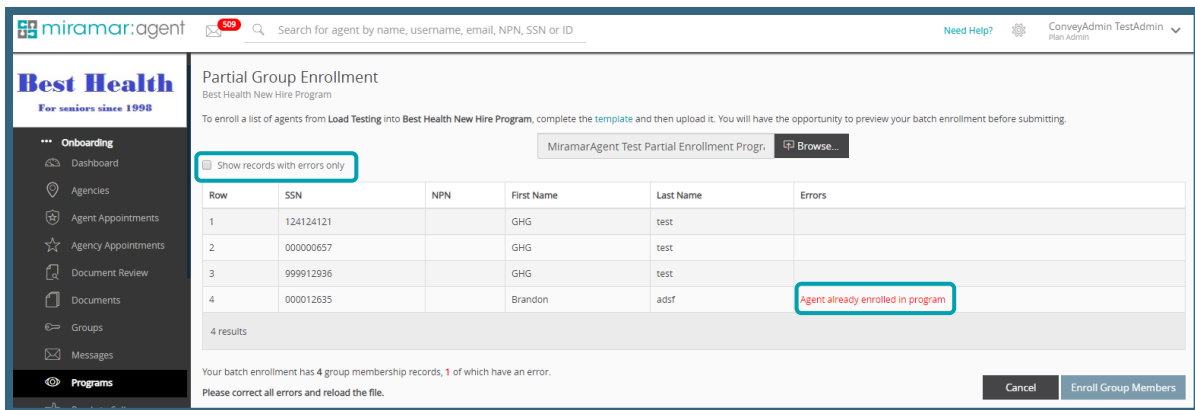
[Cancel](#) [Enroll Group Members](#)

### Upload Errors

If there are any errors in the file, you will not be able to upload it until they have been corrected.

You will be able to review any errors from this same page. To easily view only the agents who errored out, check the box next to **Show records with errors only**.

An explanation of the error will be in the last column in red font. Correct any issues in the file and re-upload.



**Partial Group Enrollment**  
Best Health New Hire Program

To enroll a list of agents from **Load Testing** into **Best Health New Hire Program**, complete the [template](#) and then upload it. You will have the opportunity to preview your batch enrollment before submitting.

☒ Show records with errors only

MiramarAgent Test Partial Enrollment Progr. [Browse...](#)

Row	SSN	NPN	First Name	Last Name	Errors
1	124124121		GHG	test	
2	000000657		GHG	test	
3	999912936		GHG	test	
4	000012635		Brandon	adsf	Agent already enrolled in program

4 results

Your batch enrollment has 4 group membership records, 1 of which have an error.  
Please correct all errors and reload the file.

[Cancel](#) [Enroll Group Members](#)

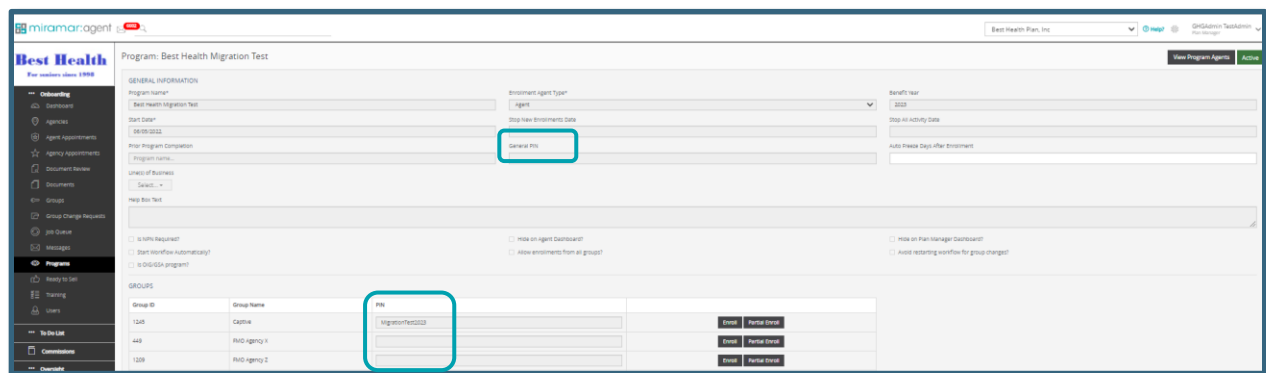


### Registration PIN Codes

If you do not elect to pre-enroll agents, you also have the option for the agent to enroll themselves using a registration PIN code.

New agents will need the group-specific PIN code when they register as an agent from the Miramar:Agent login page. The group-specific PIN code is required for new agents to register since an agent is required to be assigned a group upon initial registration.


Existing agents register for the program from their agent dashboard by using either the group-specific or general PIN code.

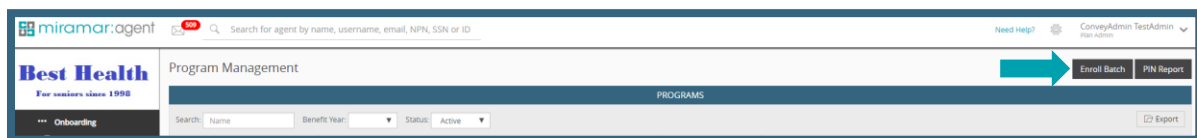


Group ID	Group Name	PIN
1248	Cosmo	MigrationTest003
448	ADD Agency 1	
1239	PHN Agency 2	

### Batch Program Enrollment

This option can be used if you have the need to enroll agents into multiple programs at one time.

 **NOTE:** This option should only be used for agents who are already enrolled into the system.

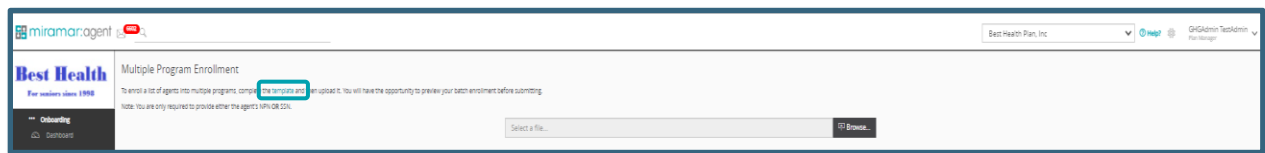


After clicking into **Enroll Batch**, you will be prompted to upload a list of agents using the provided template, which can be downloaded by clicking into the **template** link.

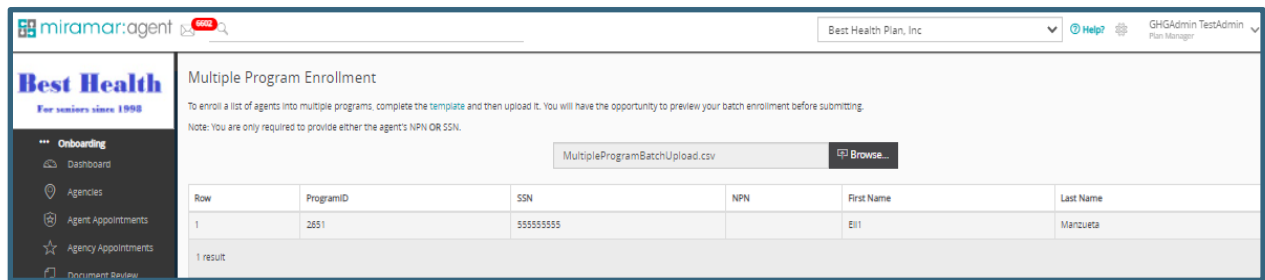
The template will require you to provide Program ID and SSN, and NPN is optional. Once you have completed the required information on the upload template, save the file to your documents, then upload it to Miramar:Agent by clicking **Browse**.



**NOTE:** The template format must be used, otherwise the file will error out. Files must also be saved in CSV (comma delimited) format in order to be uploaded.



Similar to the Partial Enrollment upload, once you have selected the file, the agent's information will populate on the same screen. If the information you have uploaded looks correct and there are no errors, select **Enroll Entire Batch** at the bottom right.



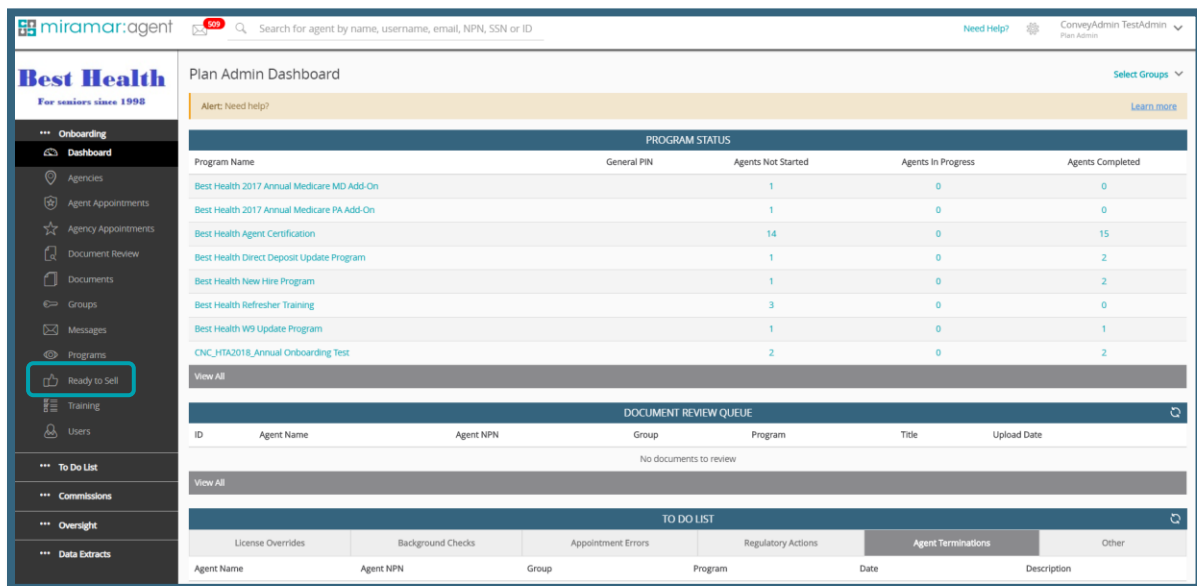
Row	ProgramID	SSN	NPN	First Name	Last Name
1	2651	555555555		Eli	Manzuela

1 result

## READY TO SELL

To manage agents who have been assigned a Ready to Sell (RTS) status, click **Ready to Sell** in the Onboarding Menu to the left of the screen; or from your dashboard, click **View All** under the *Ready to Sell* widget.

RTS is a static status assigned at the time the agent goes through his or her certification program, after he or she has completed all required steps determined by each individual plan. RTS most commonly includes the confirmation of an active license and appointment. Because RTS ties to license and appointment, an agent may have multiple RTS statuses per plan if he or she is licensed and appointed in multiple states.



**miramar:agent** Search for agent by name, username, email, NPN, SSN or ID

**Best Health**  
For seniors since 1998

**Onboarding**  
Dashboard  
Agencies  
Agent Appointments  
Agency Appointments  
Document Review  
Documents  
Groups  
Messages  
Programs  
**Ready to Sell**  
Training  
Users

**To Do List**  
Commissions  
Oversight  
Data Extracts

**Plan Admin Dashboard** Select Groups

Alert: Need help? [Learn more](#)

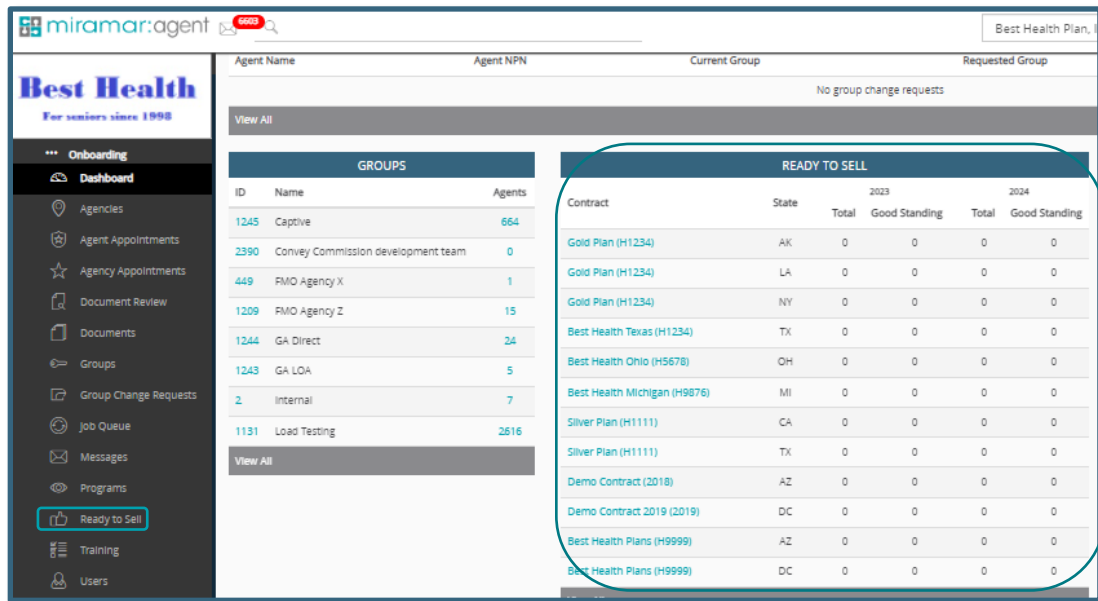
PROGRAM STATUS				
Program Name	General PIN	Agents Not Started	Agents In Progress	Agents Completed
Best Health 2017 Annual Medicare MD Add-On		1	0	0
Best Health 2017 Annual Medicare PA Add-On		1	0	0
Best Health Agent Certification		14	0	15
Best Health Direct Deposit Update Program		1	0	2
Best Health New Hire Program		1	0	2
Best Health Refresher Training		3	0	0
Best Health W9 Update Program		1	0	1
CNC_HTA2018_Annual Onboarding Test		2	0	2

[View All](#)

DOCUMENT REVIEW QUEUE						
ID	Agent Name	Agent NPN	Group	Program	Title	Upload Date
No documents to review						

[View All](#)

TO DO LIST						
License Overrides	Background Checks	Appointment Errors	Regulatory Actions	Agent Terminations	Other	
Agent Name	Agent NPN	Group	Program	Date	Description	

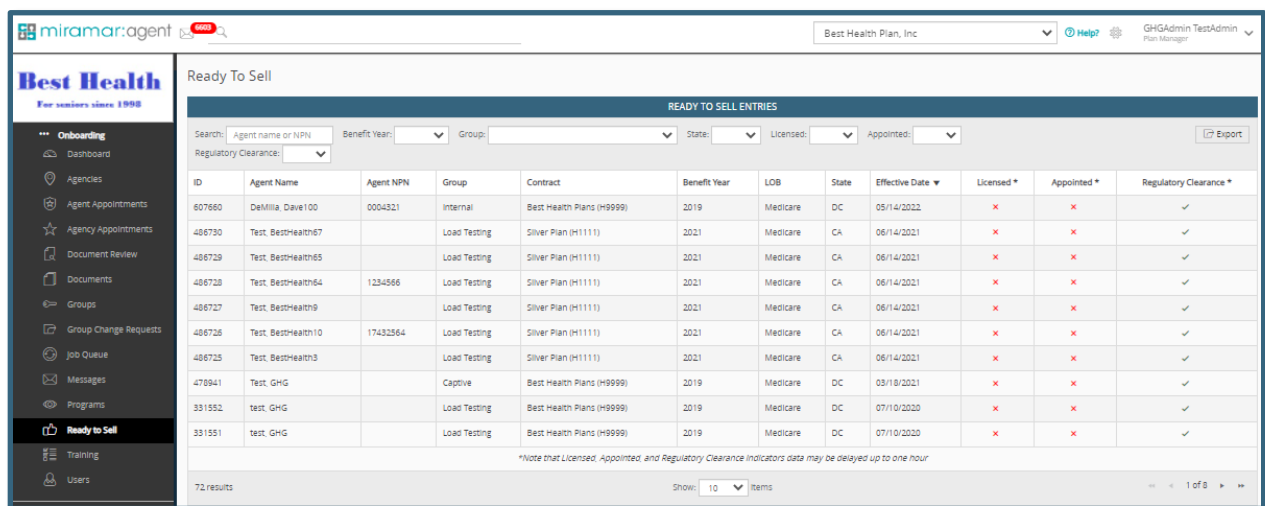


Contract	State	2023 Total	2023 Good Standing	2024 Total	2024 Good Standing
Gold Plan (H1234)	AK	0	0	0	0
Gold Plan (H1234)	LA	0	0	0	0
Gold Plan (H1234)	NY	0	0	0	0
Best Health Texas (H1234)	TX	0	0	0	0
Best Health Ohio (H5678)	OH	0	0	0	0
Best Health Michigan (H9876)	MI	0	0	0	0
Silver Plan (H1111)	CA	0	0	0	0
Silver Plan (H1111)	TX	0	0	0	0
Demo Contract (2018)	AZ	0	0	0	0
Demo Contract 2019 (2019)	DC	0	0	0	0
Best Health Plans (H9999)	AZ	0	0	0	0
Best Health Plans (H9999)	DC	0	0	0	0

Once you have clicked into Ready to Sell or View All, you will be taken to the Ready to Sell index. Here you will find all agents with a Ready to Sell status, including the contract, state, benefit year, and effective date of their status.



**NOTE:** The last two columns show the status of the agent's license and appointment. A red **X** indicates an inactive status, and a green check mark (✓) indicates an active status. You also have the ability to filter on these statuses.

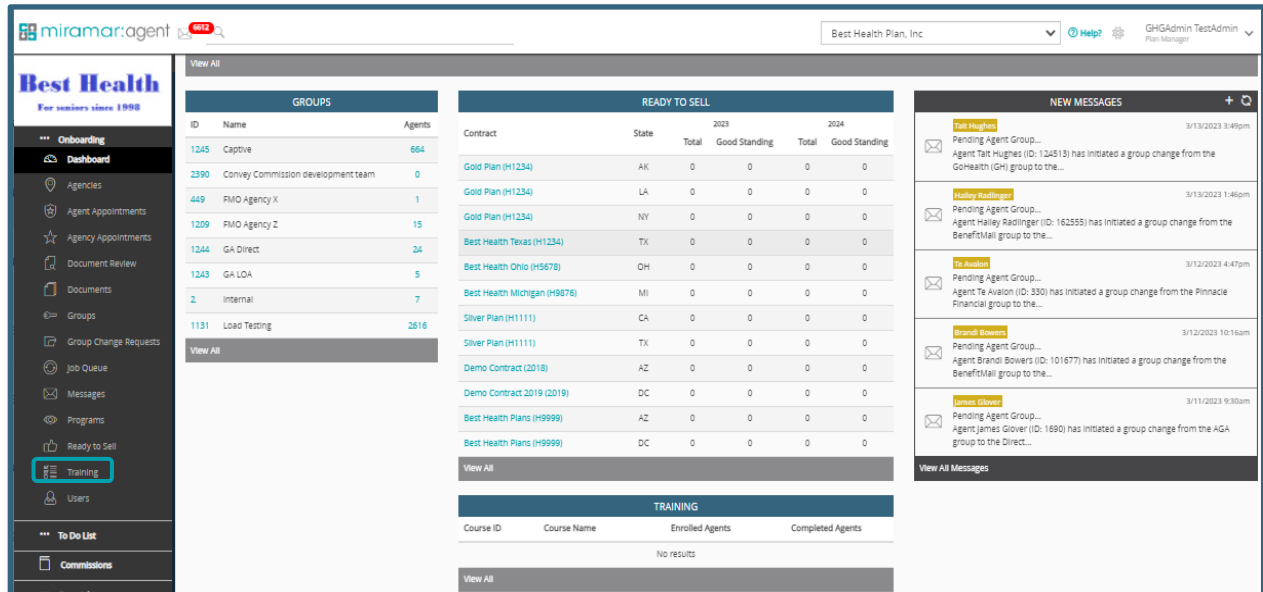


ID	Agent Name	Agent NPN	Group	Contract	Benefit Year	LOB	State	Effective Date	Licensed *	Appointed *	Regulatory Clearance *
607860	DeMilla, Dave100	0004321	Internal	Best Health Plans (H9999)	2019	Medicare	DC	05/14/2022	X	X	✓
486730	Test, BestHealth67		Load Testing	Silver Plan (H1111)	2021	Medicare	CA	06/14/2021	X	X	✓
486729	Test, BestHealth65		Load Testing	Silver Plan (H1111)	2021	Medicare	CA	06/14/2021	X	X	✓
486728	Test, BestHealth64	1234566	Load Testing	Silver Plan (H1111)	2021	Medicare	CA	06/14/2021	X	X	✓
486727	Test, BestHealth63		Load Testing	Silver Plan (H1111)	2021	Medicare	CA	06/14/2021	X	X	✓
486726	Test, BestHealth62	17432564	Load Testing	Silver Plan (H1111)	2021	Medicare	CA	06/14/2021	X	X	✓
486725	Test, BestHealth61		Load Testing	Silver Plan (H1111)	2021	Medicare	CA	06/14/2021	X	X	✓
478941	Test, GHG		Captive	Best Health Plans (H9999)	2019	Medicare	DC	03/18/2021	X	X	✓
331552	Test, GHG		Load Testing	Best Health Plans (H9999)	2019	Medicare	DC	07/10/2020	X	X	✓
331551	Test, GHG		Load Testing	Best Health Plans (H9999)	2019	Medicare	DC	07/10/2020	X	X	✓

\*Note that Licensed, Appointed, and Regulatory Clearance indicators data may be delayed up to one hour

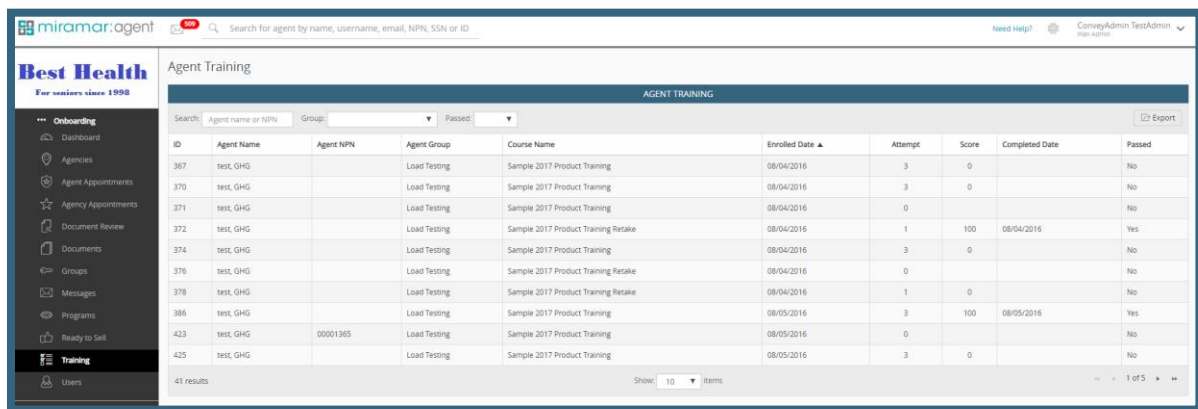
## TRAINING

To manage agents' training records, click **Training** in the Onboarding Menu to the left of the screen; or from your dashboard, click **View All** under the *Training* widget.



The screenshot shows the miramar:agent dashboard for Best Health Plan, Inc. The left sidebar contains the Onboarding menu with options: Dashboard, Agencies, Agent Appointments, Agency Appointments, Document Review, Documents, Groups, Group Change Requests, Job Queue, Messages, Programs, Ready to Sell, **Training** (highlighted), and Users. The main content area is divided into three sections: GROUPS, READY TO SELL, and NEW MESSAGES. The GROUPS section lists various agent groups with their IDs, names, and agent counts. The READY TO SELL section shows a table of contracts with columns for Contract, State, Total, and Good Standing for the years 2023 and 2024. The NEW MESSAGES section displays a list of pending agent group changes with details like agent names and IDs. At the bottom, there is a TRAINING section with a table of course enrollments, including Course ID, Course Name, Enrolled Agents, and Completed Agents.

Once you have clicked into *Training* or *View All*, you will be taken to the Agent Training index where you will be able to view course enrollment date, number of attempts, score, completion date, and status.

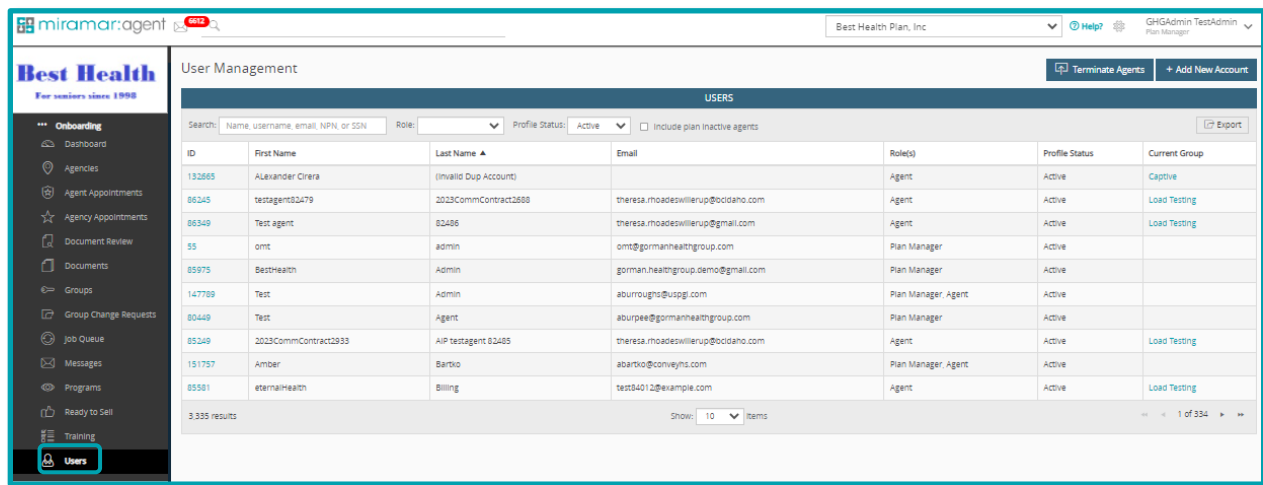


The screenshot shows the Agent Training index page. The top header includes the miramar:agent logo, a search bar, and user information. The main content area is titled "Agent Training" and features a table with columns: ID, Agent Name, Agent NPN, Agent Group, Course Name, Enrolled Date, Attempt, Score, Completed Date, and Passed. The table lists various training records for agents, including course names like "Sample 2017 Product Training" and "Sample 2017 Product Training Retake". The bottom of the page shows a summary of 41 results and a pagination control.

## USERS

To manage users, including agents and plan administrators, click **Users** from the Onboarding menu to the left side of the screen. Here you will see the User Management index where you can click into any of the *agent IDs* to view basic agent information and add/edit plan administrator permissions.

You can also terminate agents at a plan level and add new plan administrators from this page.



**User Management**

Search: Name, username, email, NPI, or SSN Role: Profile Status: Active ☐ Include plan inactive agents [Export](#)

ID	First Name	Last Name	Email	Role(s)	Profile Status	Current Group	
132665	Alexander	Cirera	(Invalid Dup Account)	Agent	Active	Captive	
06345	testagent	83479	2023CommContract2688	theresa.moadeswillerup@ocidaho.com	Agent	Active	Load Testing
06349	Test agent	83486	theresa.moadeswillerup@gmail.com	Agent	Active	Load Testing	
55	omt	admin	omt@gormanhealthgroup.com	Plan Manager	Active		
05975	BestHealth	Admin	gorman.healthgroup.demo@gmail.com	Plan Manager	Active		
147789	Test	Admin	aburroughs@uspgi.com	Plan Manager, Agent	Active		
00449	Test	Agent	aburpee@gormanhealthgroup.com	Plan Manager	Active		
05249	2023CommContract2833	AIP testagent	83485	theresa.moadeswillerup@ocidaho.com	Agent	Active	Load Testing
151757	Amber	Bartio	abartio@conveyhls.com	Plan Manager, Agent	Active		
05581	externalHealth	Billing	test84012@example.com	Agent	Active	Load Testing	

3,335 results Show: 10 items 1 of 334

## How do I add a new Plan Manager?

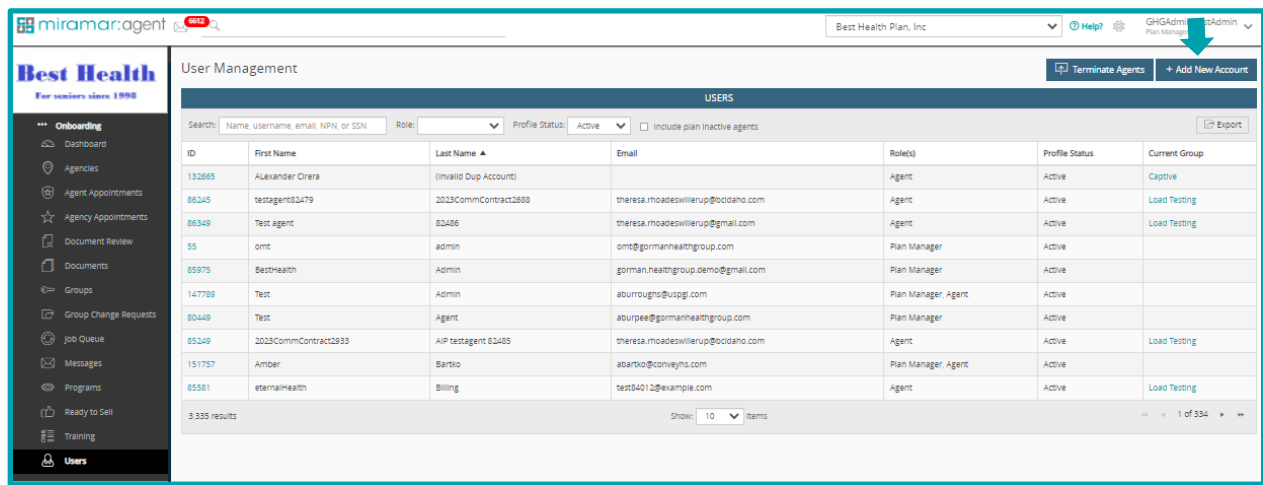
Managers can be added by creating a new account under the Plan Manager role or by adding the necessary admin permissions to an existing agent account.

### New Plan Manager

To create a new plan manager account, click **Add New Account** from the User Management index. The role of Plan Manager will be selected and below this, permissions can be selected individually for the Plan Manager role.



**QUICK TIP:** It is best practice to add plan administrator permissions to an existing agent account, as agent abilities cannot be added to a plan administrator account.



The screenshot shows the 'User Management' page in the 'miramar:agent' system. The 'Users' section is active, displaying a table of users. A red arrow points to the '+ Add New Account' button in the top right corner of the Users section.

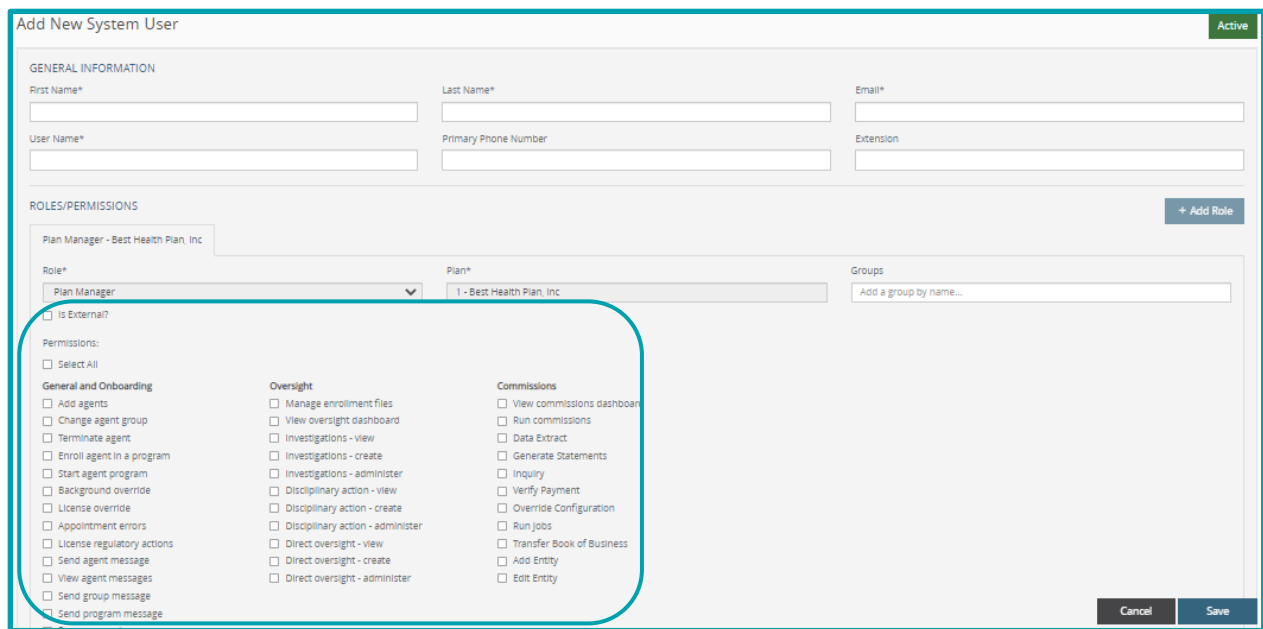
ID	First Name	Last Name	Email	Role(s)	Profile Status	Current Group
13265	Alexander Cirera	(Invalid Dup Account)		Agent	Active	Captive
86345	testagent32479	2023CommContract3288	theresa.moadeswillerup@ocidano.com	Agent	Active	Load Testing
86349	Test agent	82485	theresa.moadeswillerup@gmail.com	Agent	Active	Load Testing
55	omt	admin	omt@gormanhealthgroup.com	Plan Manager	Active	
85975	BestHealth	Admin	gorman.healthgroup.demo@gmail.com	Plan Manager	Active	
147789	Test	Admin	aburroughs@uspgi.com	Plan Manager, Agent	Active	
80449	Test	Agent	aburpee@gormanhealthgroup.com	Plan Manager	Active	
85249	2023CommContract3283	AIP testagent 82485	theresa.moadeswillerup@ocidano.com	Agent	Active	Load Testing
151757	Amber	Barrio	abarrio@conveyhds.com	Plan Manager, Agent	Active	
85581	eternalhealth	Billing	test84012@example.com	Agent	Active	Load Testing

3335 results | Show: 10 items | 1 of 334

Once you have clicked into Add New Account, you will be prompted to fill out basic agent information. First Name, Last Name, Email, and User Name are required to create a new account.

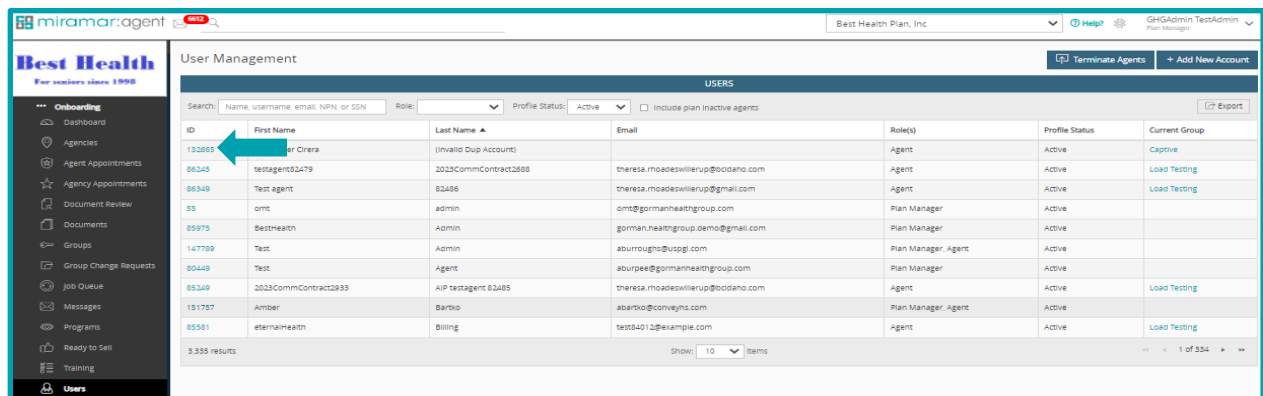
Select which permissions you want to give the plan manager. If they should only be able to view certain groups, be sure to select the group(s) by typing them into the text box under *Groups*. Once you have selected the permissions you wish to give them, click **Save**.

Click **Save** to create the plan administrator account. An email will be sent to the new plan administrator with temporary log in instructions.



## Existing Agent

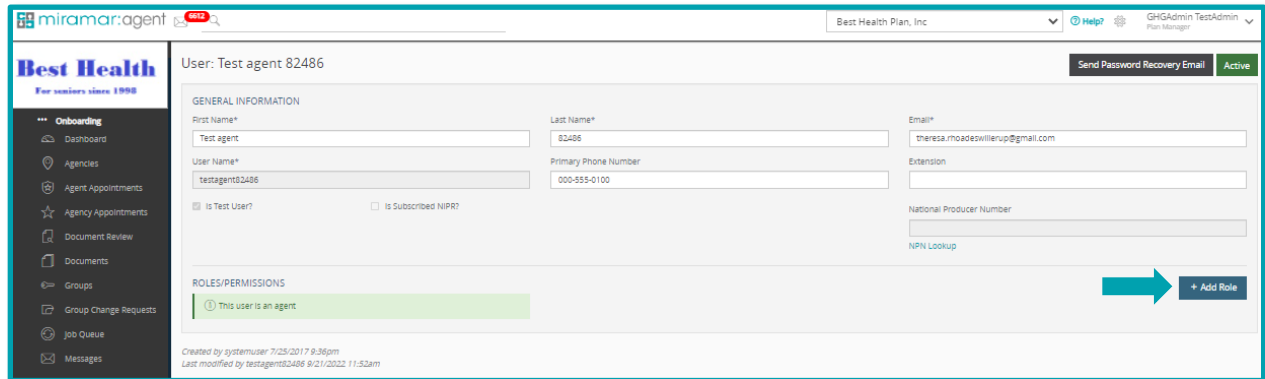
To add plan administrator permissions to an existing agent, start by searching for the agent under the User Management index. Click into the *agent's ID*.



ID	First Name	Last Name	Email	Role(s)	Profile Status	Current Group
132655	Ar Cirera	(Invalid Dup Account)		Agent	Active	Captive
86345	testagent82479	2023CommContract2688	theresa.moadeswillerup@ccidaho.com	Agent	Active	Load Testing
86349	Test agent	82486	theresa.moadeswillerup@gmail.com	Agent	Active	Load Testing
55	omt	admin	omt@gormanhealthgroup.com	Plan Manager	Active	
85975	BestHealth	Admin	gorman.healthgroup.demod@gmail.com	Plan Manager	Active	
147789	Test	Admin	aburroughs@uspgi.com	Plan Manager, Agent	Active	
80449	Test	Agent	aburpee@gormanhealthgroup.com	Plan Manager	Active	
86349	2023CommContract2833	AIP testagent 82485	theresa.moadeswillerup@ccidaho.com	Agent	Active	Load Testing
151797	Amber	Barbio	abarbio@conveyhls.com	Plan Manager, Agent	Active	
85581	eternalHealth	Billing	test04012@example.com	Agent	Active	Load Testing



Here you will see the individual agent's basic information, including username and his or her roles and permissions. To add administrator permissions, click **Add Role**.



User: Test agent 82486

**GENERAL INFORMATION**

First Name\*  
Test agent

Last Name\*  
82486

Email\*  
theresa.roadswillerup@gmail.com

User Name\*  
testagent0486

Primary Phone Number  
000-555-0100

Extension

National Producer Number

NPN Lookup

☐ Is Test User? ☐ Is Subscribed NIPR?

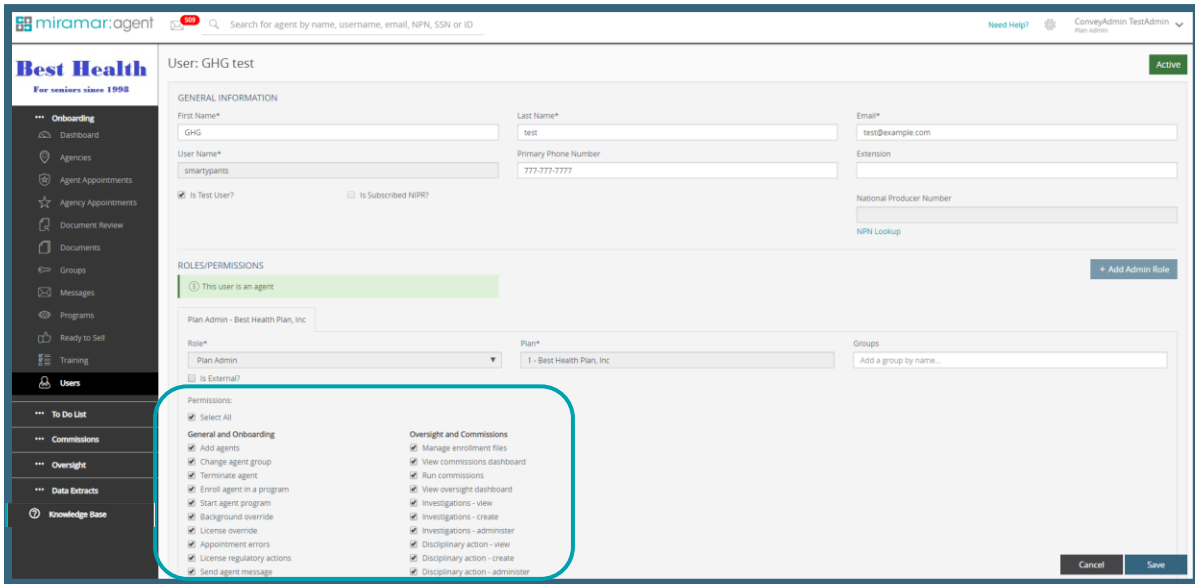
**ROLES/PERMISSIONS**

This user is an agent

+ Add Role

Created by systemuser 7/25/2017 9:36pm  
Last modified by testagent0486 9/21/2022 11:52am

Select which permissions you want to give the plan manager. If they should only be able to view certain groups, be sure to select the group(s) by typing them into the text box under *Groups*. Once you have selected the permissions you wish to give them, click **Save**.



User: GHG test

**GENERAL INFORMATION**

First Name\*  
GHG

Last Name\*  
test

Email\*  
test@example.com

User Name\*  
smartypants

Primary Phone Number  
777-777-7777

Extension

National Producer Number

NPN Lookup

☒ Is Test User? ☐ Is Subscribed NIPR?

**ROLES/PERMISSIONS**

This user is an agent

+ Add Admin Role

Plan Admin - Best Health Plan, Inc

Role\*  
Plan Admin

Plan\*  
1 - Best Health Plan, Inc

Groups  
Add a group by name...

Permissions:

- ☒ Select All
- ☒ General and Onboarding
- ☒ Add agents
- ☒ Change agent group
- ☒ Terminate agent
- ☒ Enroll agent in a program
- ☒ Start agent program
- ☒ Background override
- ☒ License override
- ☒ Appointment errors
- ☒ License regulatory actions
- ☒ Send agent message
- ☒ Oversight and Commissions
- ☒ Manage enrollment files
- ☒ View commissions dashboard
- ☒ Run commissions
- ☒ View oversight dashboard
- ☒ Investigations - view
- ☒ Investigations - create
- ☒ Investigations - administer
- ☒ Disciplinary action - view
- ☒ Disciplinary action - create
- ☒ Disciplinary action - administer

Cancel Save

## How do I terminate an agent at the plan level?

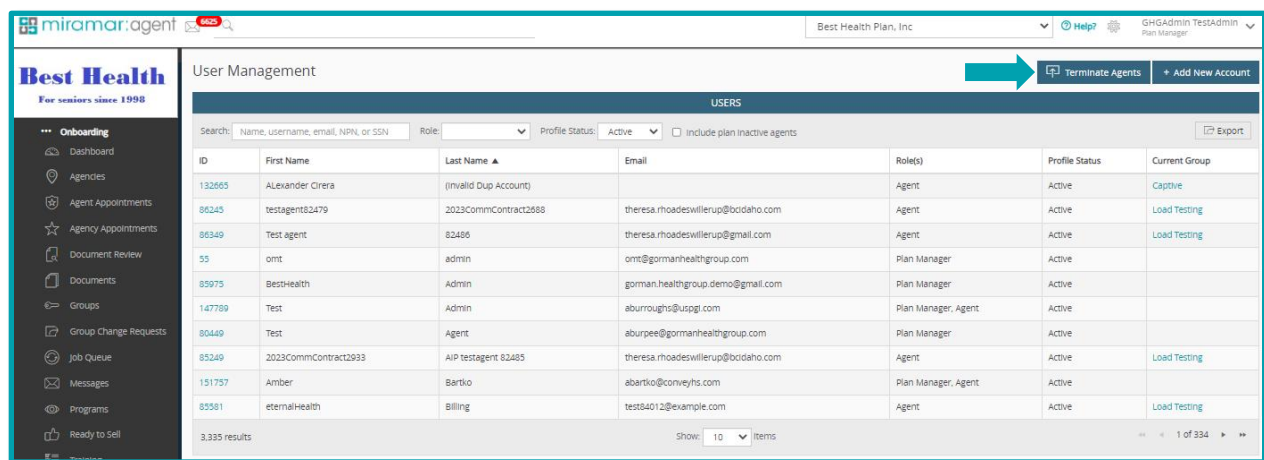
Terminating an agent at the plan level will disassociate the agent from the plan. When they log in to their agent dashboard, they will no longer see your plan information or be able to start or continue your plan's programs.



Agent appointments **MUST** be terminated prior to terminating that agent from their plan affiliation. Failure to do this will end your access to terminate that agent's appointments at a later time.

Terminating individual agent appointments can be done from Agent Appointments or can be done in batch via the Appointing Entity Management selection from the gear (⚙️) icon at the top right. Details to this process are referred to on Page 69 under **Agent Appointments**.

Enter the User Management Index to access your options regarding Agent addition or termination. To initiate an individual or batch termination, click **Terminate Agents**.



The screenshot shows the 'User Management' page in the Miramar:Agent system. The page has a sidebar on the left with navigation options like Dashboard, Agencies, Agent Appointments, etc. The main content area displays a table of users. At the top right of the table, there are buttons for 'Terminate Agents' and 'Add New Account'. A red arrow points to the 'Terminate Agents' button.

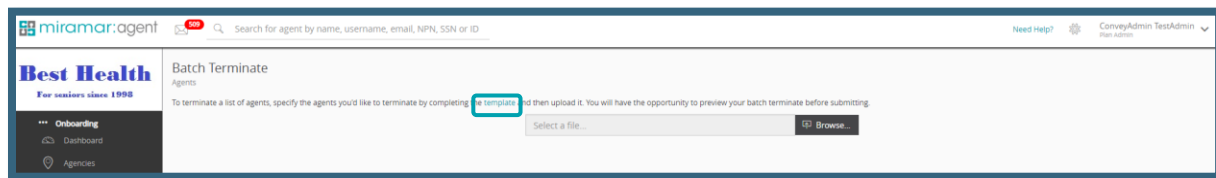
ID	First Name	Last Name	Email	Role(s)	Profile Status	Current Group
132655	Alexander	Cirera	(invalid Dup Account)	Agent	Active	Captive
86245	testagent82479	2023CommContract2688	theresa.rhoadeswilerup@bocdaho.com	Agent	Active	Load Testing
86349	Test agent	82486	theresa.rhoadeswilerup@gmail.com	Agent	Active	Load Testing
55	omt	admin	omt@gormanhealthgroup.com	Plan Manager	Active	
85975	BestHealth	Admin	gorman.healthgroup.demo@gmail.com	Plan Manager	Active	
147789	Test	Admin	aburroughs@uspgi.com	Plan Manager, Agent	Active	
80449	Test	Agent	aburpee@gormanhealthgroup.com	Plan Manager	Active	
85249	2023CommContract2993	AIP testagent 82485	theresa.rhoadeswilerup@bocdaho.com	Agent	Active	Load Testing
151757	Amber	Bartko	abartko@conveyhs.com	Plan Manager, Agent	Active	
85581	eternalHealth	Billing	test84012@example.com	Agent	Active	Load Testing

After clicking into *Terminate Agents*, you will be prompted to upload a list of agents using the provided template, which can be downloaded by clicking into the **template** link.

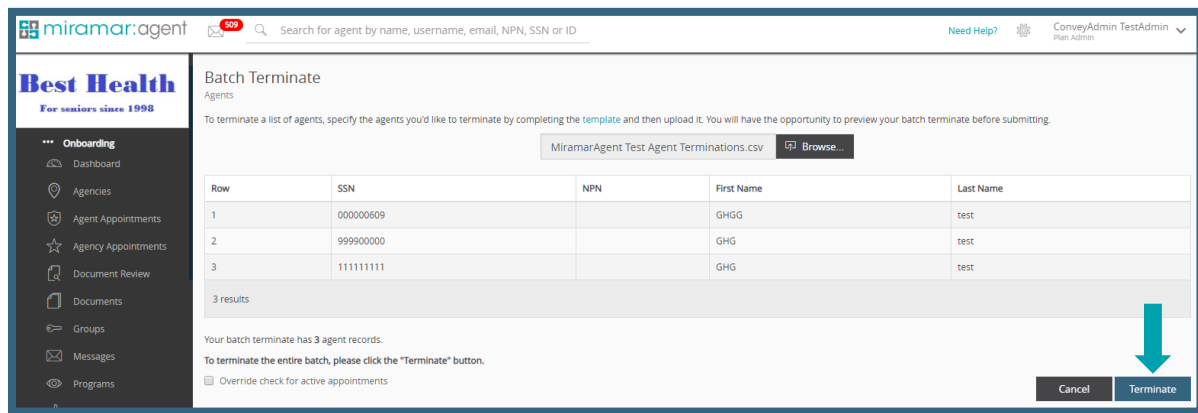
The template will require you to provide SSN, and NPN is optional. Once you have completed the required information on the upload template, save the file to your documents, then upload it to Miramar:Agent by clicking **Browse**.



**NOTE:** The template format must be used, otherwise the file will error out. Files must also be saved in CSV (comma delimited) format in order to be uploaded.



Once you have selected the file, the agent's information will populate on the same screen. If the information you have uploaded looks correct and there are no errors, select **Terminate** at the bottom right.



**Batch Terminate**  
Agents

To terminate a list of agents, specify the agents you'd like to terminate by completing the template and then upload it. You will have the opportunity to preview your batch terminate before submitting.

MiramarAgent Test Agent Terminations.csv [Browse...](#)

Row	SSN	NPN	First Name	Last Name
1	000000609		GHGG	test
2	999900000		GHG	test
3	111111111		GHG	test

3 results


Your batch terminate has 3 agent records.  
To terminate the entire batch, please click the "Terminate" button.

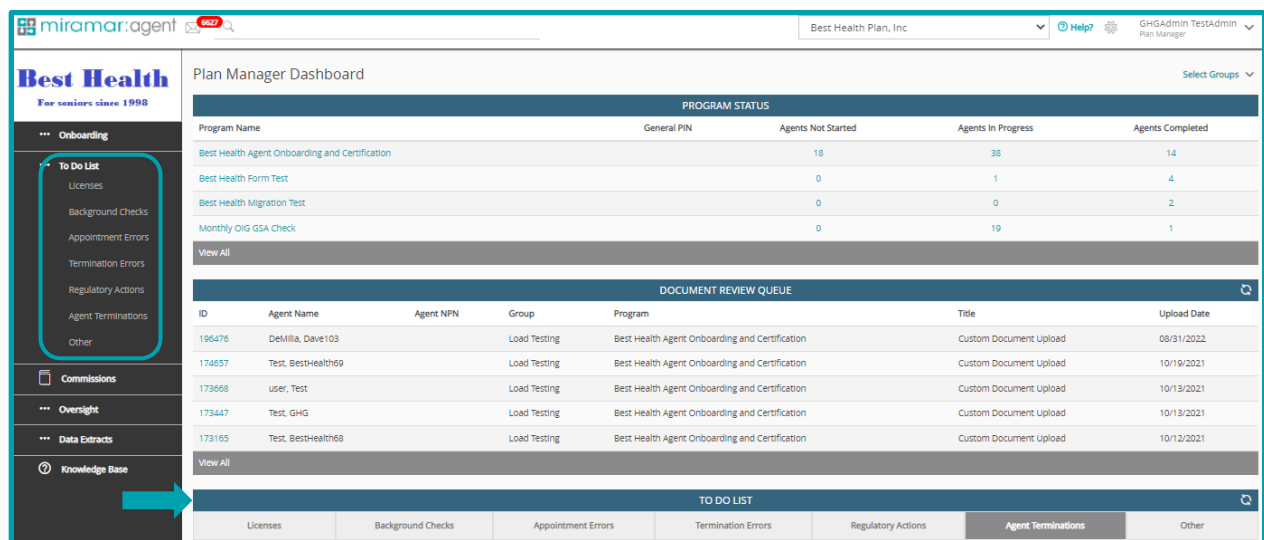
☐ Override check for active appointments

[Cancel](#) [Terminate](#)

## TO DO LIST

Actionable items for plan managers can be managed from the To Do List, which can be accessed by opening the **To Do List** in the Onboarding Menu and selecting one of the categories: *Licenses*, *Regulatory Actions*, *Background Checks*, *Appointment Errors*, *Agent Terminations*, *Termination Errors* or *Other*. You can also find the most recent actionable items under the To Do Queue widget on your dashboard.

 **IMPORTANT NOTE:** The To Do Queue is crucial to the management and success of your programs and should be reviewed daily by a plan administrator.



**Plan Manager Dashboard**

PROGRAM STATUS

Program Name	General PIN	Agents Not Started	Agents In Progress	Agents Completed
Best Health Agent Onboarding and Certification		18	38	14
Best Health Form Test		0	1	4
Best Health Migration Test		0	0	2
Monthly OIG GSA Check		0	19	1

View All

DOCUMENT REVIEW QUEUE

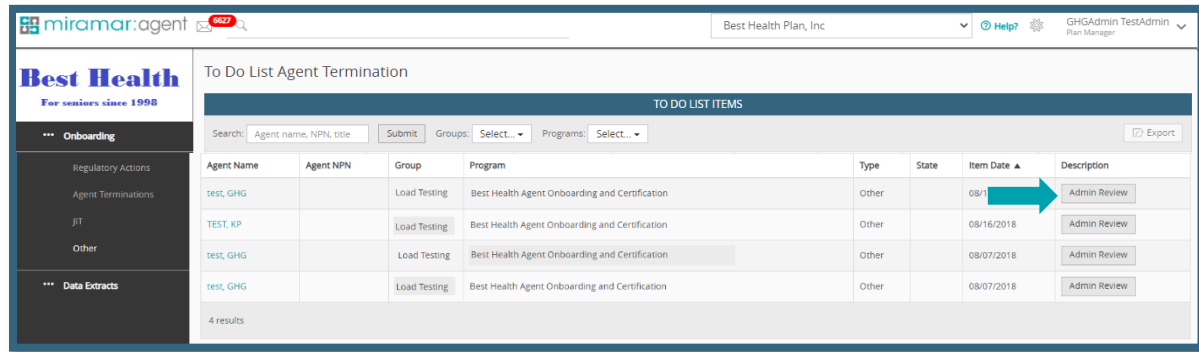
ID	Agent Name	Agent NPN	Group	Program	Title	Upload Date
190476	DeMilla, Dave103		Load Testing	Best Health Agent Onboarding and Certification	Custom Document Upload	08/31/2022
174657	Test, BestHealth69		Load Testing	Best Health Agent Onboarding and Certification	Custom Document Upload	10/19/2021
173668	user, Test		Load Testing	Best Health Agent Onboarding and Certification	Custom Document Upload	10/13/2021
173447	Test, GHG		Load Testing	Best Health Agent Onboarding and Certification	Custom Document Upload	10/13/2021
173165	Test, BestHealth68		Load Testing	Best Health Agent Onboarding and Certification	Custom Document Upload	10/12/2021

View All

TO DO LIST

Licenses	Background Checks	Appointment Errors	Termination Errors	Regulatory Actions	Agent Terminations	Other
----------	-------------------	--------------------	--------------------	--------------------	--------------------	-------

To manage each individual queue, click into the actionable button under the description of each queue.



**Best Health**  
For seniors since 1998

Onboarding  
Regulatory Actions  
Agent Terminations  
JIT  
Other

Data Extracts

To Do List Agent Termination

TO DO LIST ITEMS

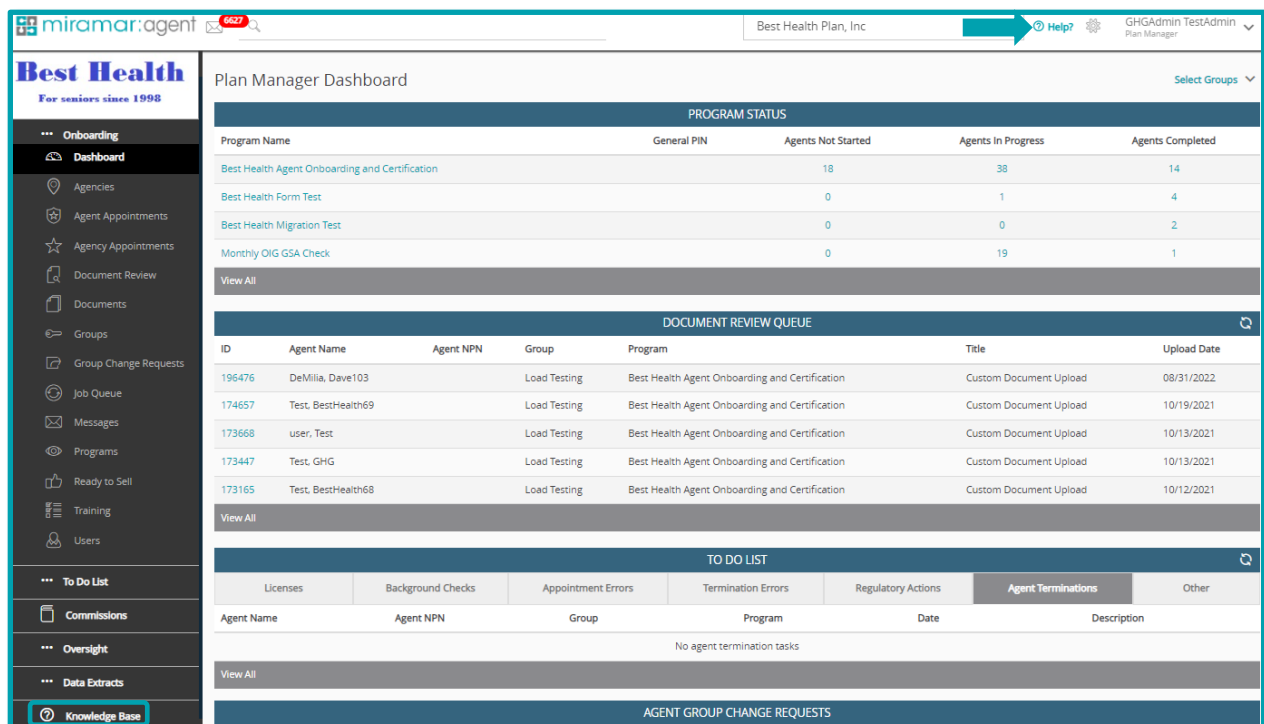
Search: Agent name, NPN, title Submit Groups: Select... Programs: Select... Export

Agent Name	Agent NPN	Group	Program	Type	State	Item Date	Description
test, GHG		Load Testing	Best Health Agent Onboarding and Certification	Other		08/16/2018	Admin Review
TEST, KP		Load Testing	Best Health Agent Onboarding and Certification	Other		08/16/2018	Admin Review
test, GHG		Load Testing	Best Health Agent Onboarding and Certification	Other		08/07/2018	Admin Review
test, GHG		Load Testing	Best Health Agent Onboarding and Certification	Other		08/07/2018	Admin Review

4 results

## KNOWLEDGE BASE

To access the Miramar:Agent Knowledge Base click **Help?** from the top of any Miramar:Agent page, or **Knowledge Base** from the *Onboarding* menu on the left side of your screen or from your dashboard.



**Best Health**  
For seniors since 1998

Onboarding  
Dashboard  
Agencies  
Agent Appointments  
Agency Appointments  
Document Review  
Documents  
Groups  
Group Change Requests  
Job Queue  
Messages  
Programs  
Ready to Sell  
Training  
Users

To Do List  
Commissions  
Oversight  
Data Extracts  
Knowledge Base

Plan Manager Dashboard

PROGRAM STATUS

Program Name	General PIN	Agents Not Started	Agents In Progress	Agents Completed
Best Health Agent Onboarding and Certification		18	38	14
Best Health Form Test		0	1	4
Best Health Migration Test		0	0	2
Monthly OIG GSA Check		0	19	1

View All

DOCUMENT REVIEW QUEUE

ID	Agent Name	Agent NPN	Group	Program	Title	Upload Date
196476	DeMilla, Dave103		Load Testing	Best Health Agent Onboarding and Certification	Custom Document Upload	08/31/2022
174657	Test, BestHealth69		Load Testing	Best Health Agent Onboarding and Certification	Custom Document Upload	10/19/2021
173668	user, Test		Load Testing	Best Health Agent Onboarding and Certification	Custom Document Upload	10/13/2021
173447	Test, GHG		Load Testing	Best Health Agent Onboarding and Certification	Custom Document Upload	10/13/2021
173165	Test, BestHealth68		Load Testing	Best Health Agent Onboarding and Certification	Custom Document Upload	10/12/2021

View All

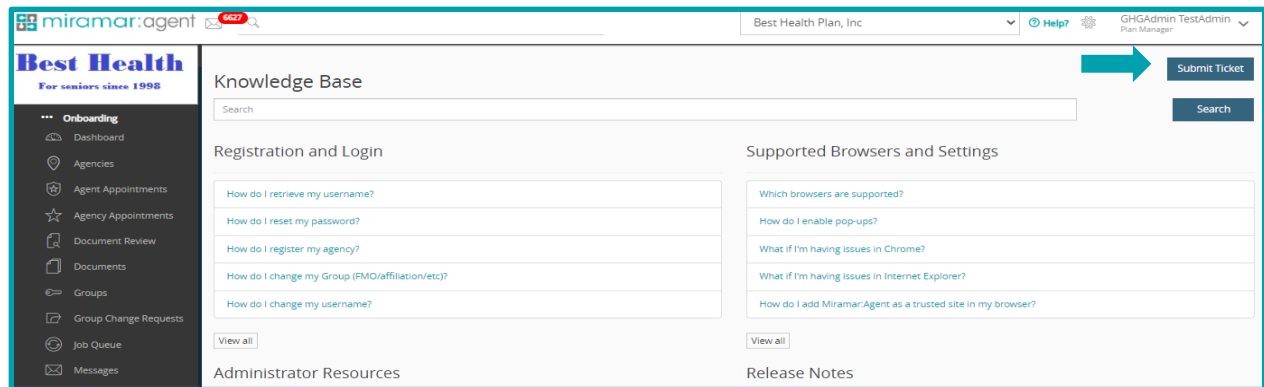
TO DO LIST

Licenses	Background Checks	Appointment Errors	Termination Errors	Regulatory Actions	Agent Terminations	Other
Agent Name	Agent NPN	Group	Program	Date	Description	
No agent termination tasks						

View All

AGENT GROUP CHANGE REQUESTS

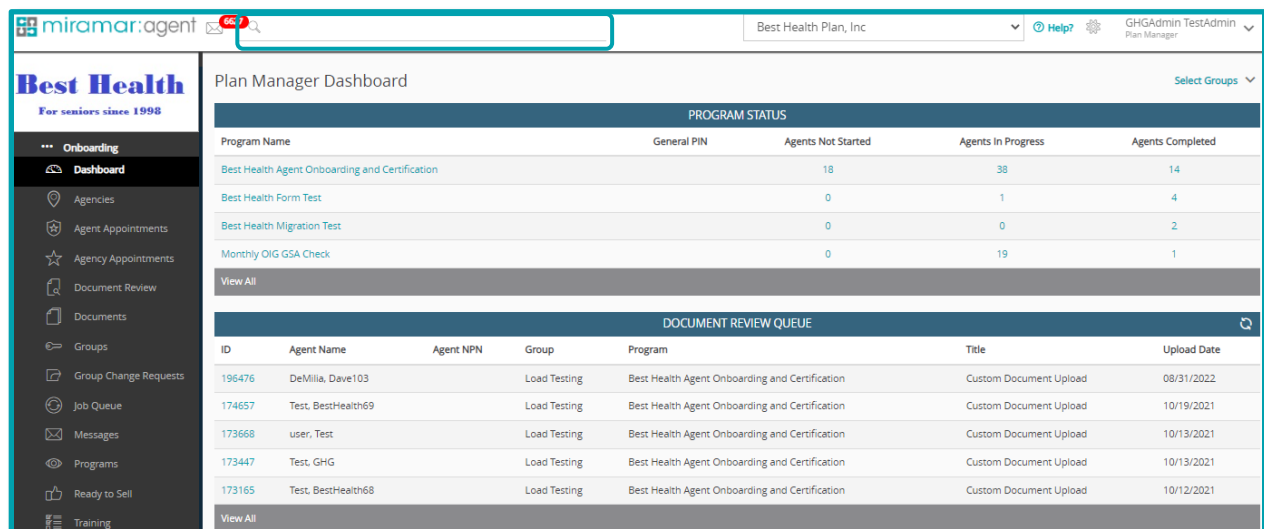
Frequently asked questions and helpful training tips are easily available from the Knowledge Base, including this user guide. Frequently asked questions and helpful training tips for agents can be found on the Knowledge Base homepage. If you need assistance, you can log a ticket by clicking **Submit Ticket** and a representative from our support center will respond within 24 hours.



## IMPERSONATING AN AGENT

### SEARCHING FOR AN AGENT

Miramar:Agent has a robust search engine. You can search for an agent, principal of an agency, or plan administrator by entering a name, username, email, NPN, SSN, or user ID in the search field at the top of the screen next to the magnifying glass. The search feature uses predictive text, so as you type, suggested search results will populate in a menu below from which you can select.





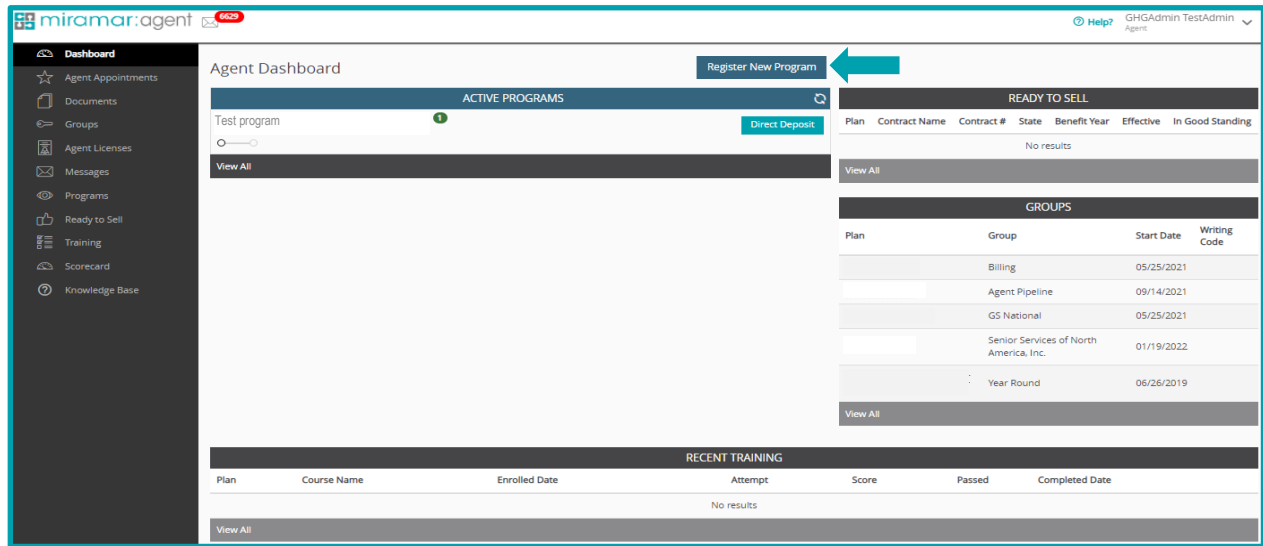
**QUICK TIP:** Searching with the most unique piece of information will narrow your results. For example, when searching for John Smith NPN# 12345, entering only the NPN# 12345 will provide the most concise search.

## AGENT DASHBOARD

Once you have located an agent's account, you will see his or her dashboard as he or she would see it when logged in to the system. However, as an administrator, you will have some additional functionality as well. You will only be able to see agents' accounts within your specific plan.

### How do I register an agent for a program?

You can register for a new program from the Agent Dashboard by clicking the **Register New** button at the top right of the *Programs* section near the top of the page.



The screenshot shows the 'miramar:agent' dashboard. On the left is a sidebar with navigation links: Dashboard, Agent Appointments, Documents, Groups, Agent Licenses, Messages, Programs, Ready to Sell, Training, Scorecard, and Knowledge Base. The main content area is titled 'Agent Dashboard' and includes a 'Register New Program' button at the top right. Below this are three main sections: 'ACTIVE PROGRAMS' (with a search bar and 'Direct Deposit' button), 'READY TO SELL' (with a table of plans), and 'GROUPS' (with a table of groups). At the bottom is a 'RECENT TRAINING' section with a table of training records. A blue arrow points to the 'Register New Program' button.

Once you click the button, you will be prompted to enter the program registration PIN code, found under the *Program Setup*, and click **Submit**. PIN codes are not case sensitive.

Agent Dashboard
Register New

ACTIVE PROGRAMS

Register for a new program  
Enter a valid registration code\*  
  
Cancel Submit

View All

The following screen will pop up to show you have registered successfully. After clicking **OK**, you can click the *refresh icon* in the top right corner of the Programs widget to see the new program on your dashboard.

Success

You were successfully registered in the **Best Health Certification Demo** program and were also added to the **Direct** group!  
The program will appear in the In-Progress programs tab on your dashboard shortly.

OK

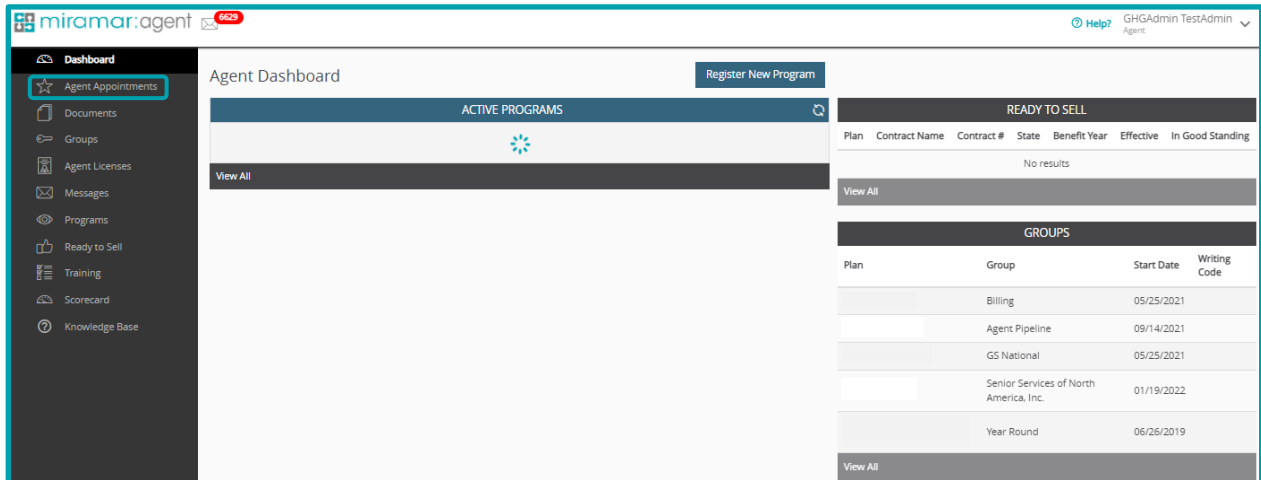
Agent Dashboard
Register New

ACTIVE PROGRAMS



## AGENT APPOINTMENTS

To view an agent's appointments, click **Agent Appointments** in the Agent Dashboard menu to the left of the screen.



The screenshot shows the 'miramar:agent' dashboard. On the left is a sidebar menu with options: Dashboard, Agent Appointments (highlighted), Documents, Groups, Agent Licenses, Messages, Programs, Ready to Sell, Training, Scorecard, and Knowledge Base. The main area is titled 'Agent Dashboard' and includes a 'Register New Program' button. It features three sections: 'ACTIVE PROGRAMS' with a 'View All' link, 'READY TO SELL' with a table of plans and a 'View All' link, and 'GROUPS' with a table of groups and a 'View All' link.

Once on the *Agent Appointments* screen, you can filter by appointment status and state.



**NOTE:** Appointments for plans shown under the agent's Groups tab of his or her dashboard are the only appointments that will display in the system.

How do I terminate an agent's appointment?

From the *Agent Appointments* index, you have the ability to terminate the agent's appointments. Click **Terminate** next to the appointment you wish to terminate.

Plan(s)	Appointing Entity ▲	State	LOA Code	Start Date	End Date	Status	PDB LOA Description	PDB Effective Date	LOA Issue Date	LOA Renewal Date	
		TX	411	03/17/2023		Pending					Delete
		LA	36	03/17/2023		Pending					Delete
		AL	935	03/13/2023		Appointed	Accident & Health or Sickness	2023-03-13T00:00:00		2023-12-31T00:00:00	Terminate
		GA	0	03/13/2023		Appointed		2023-03-13T00:00:00			Terminate
		LA	36	03/13/2023		Appointed	Life, Accident & Health	2023-03-13T00:00:00		2023-12-31T00:00:00	Terminate
		MS	236	03/13/2023		Appointed	No LOA Needed	2023-03-13T00:00:00			Terminate

Once you have selected *Terminate*, a confirmation box will pop up. Select the Termination Reason from the drop-down menu. Termination Reasons vary based on state. To confirm the termination, click **Terminate**. To cancel the termination and return to the Agent Appointments index, click **Cancel**.

Confirm

×

Are you sure you want to terminate this agent's appointment?  
If so, please specify the reason for termination and click "Terminate".

Termination Reason\*

▼

Cancel

Terminate

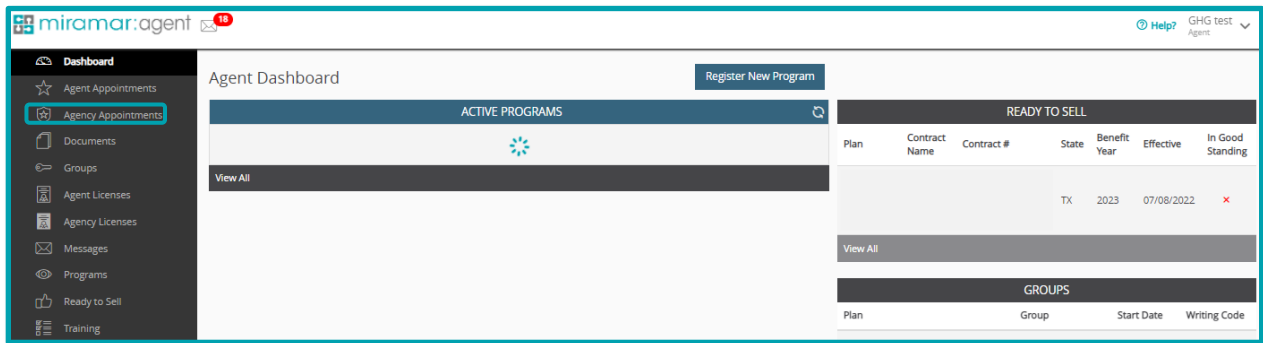


Once the termination has been successfully submitted, you will see the green banner below at the bottom of your browser screen.

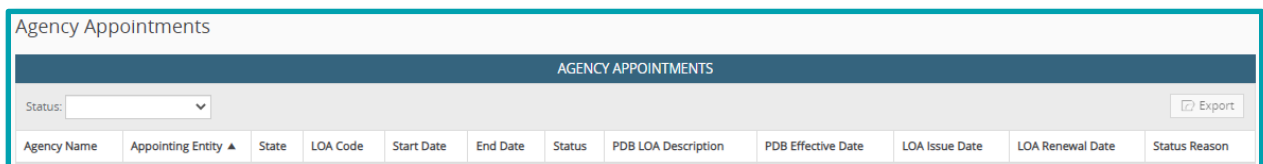


## AGENCY APPOINTMENTS

If an agent is registered as the Principal Agent of an agency, the agency's appointments will be available to view under the *Agency Appointment* index. Click **Agency Appointments** from the Agent Dashboard menu.

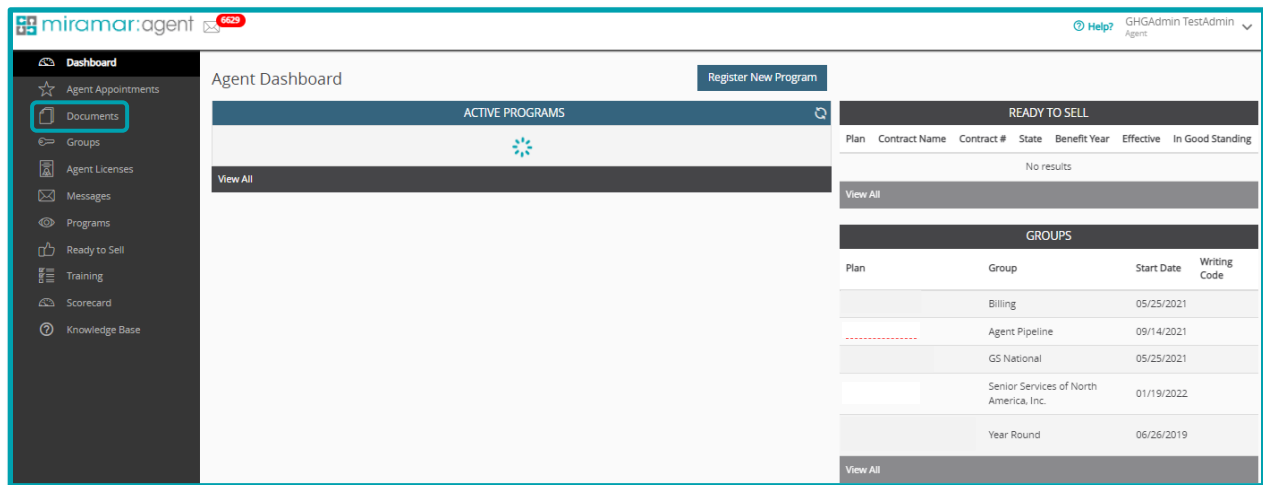


Appointment information is refreshed on a daily basis. Once you are in the agent's Agency Appointment index, you can filter by status.



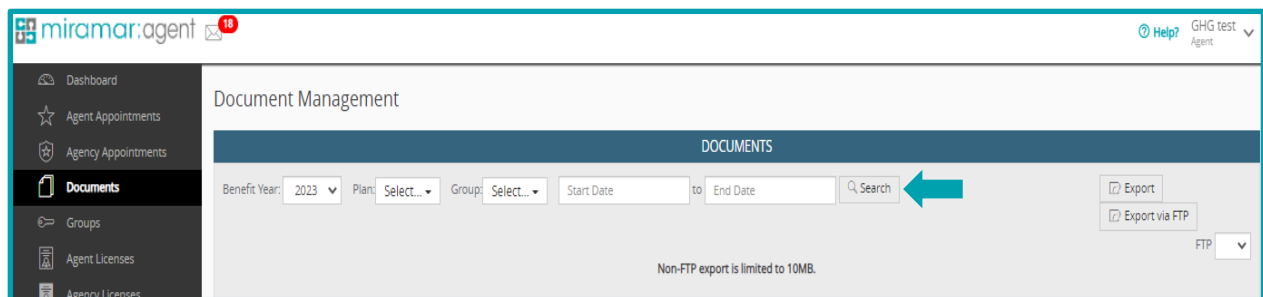
## DOCUMENTS

To view an agent's *Documents*, click into **Documents** in the Agent Dashboard menu to the left of the screen.

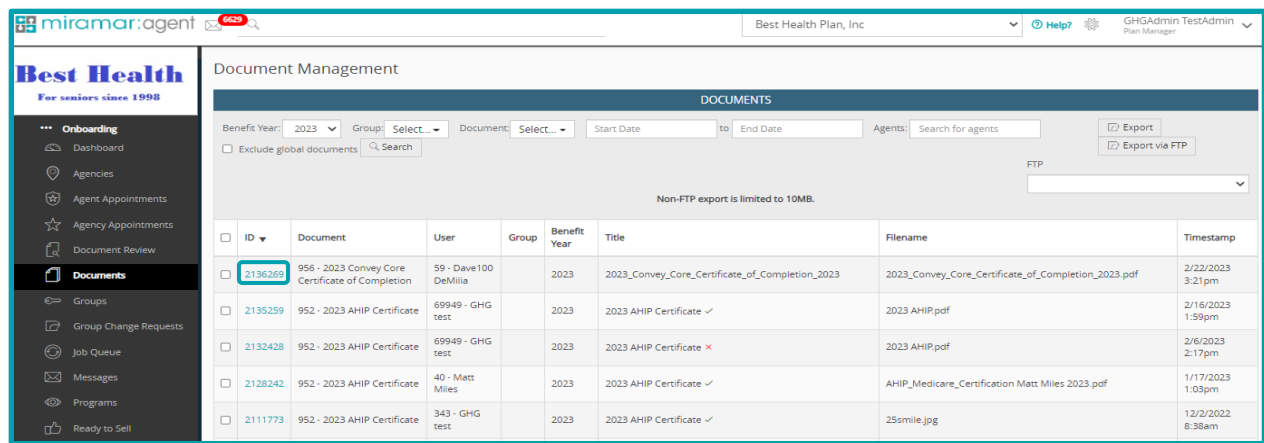


Documents you will find here include training completion certificates, forms that were saved within your plan's onboarding program, or any other document the agents uploaded themselves into their Documents section.

Upon initially clicking into the Documents section, no documents will be viewable. To view all of the agents documents, click **Search**. You can also narrow your search by filtering on Benefit Year, Group, Document Type, and date range.



You can view the individual document by clicking into the *document ID*.



ID	Document	User	Group	Benefit Year	Title	Filename	Timestamp
2136269	956 - 2023 Convey Core Certificate of Completion	59 - Dave100 DeMilia		2023	2023_Convey_Core_Certificate_of_Completion_2023	2023_Convey_Core_Certificate_of_Completion_2023.pdf	2/22/2023 3:21pm
2135259	952 - 2023 AHIP Certificate	69949 - GHG test		2023	2023 AHIP Certificate ✓	2023 AHIP.pdf	2/16/2023 1:59pm
2132428	952 - 2023 AHIP Certificate	69949 - GHG test		2023	2023 AHIP Certificate ✗	2023 AHIP.pdf	2/6/2023 2:17pm
2128242	952 - 2023 AHIP Certificate	40 - Matt Miles		2023	2023 AHIP Certificate ✓	AHIP_Medicare_Certification Matt Miles 2023.pdf	1/17/2023 1:03pm
2111773	952 - 2023 AHIP Certificate	343 - GHG test		2023	2023 AHIP Certificate ✓	25smile.jpg	12/2/2022 8:38am

Additionally, the status of an uploaded document will appear next to the document title.

- A grey ellipses (...) indicates the review is in progress.
- A green check mark (✓) indicates the certificate was accepted.
- A red ✗ indicates the certificate was rejected.

### How do I upload a document to an agent's profile?

Document uploads generally take place within programs. Programs will prompt agents to upload documents as needed for verification within the program.



**IMPORTANT NOTE:** Documents you upload in a program are stored to a system that does not accept the below characters. If your file has one of these characters, rename before uploading. If your document has an extremely long name, you may also want to shorten it, as very long file paths may result in errors.

- Tilde (~)
- Number sign (#)
- Percent (%)
- Ampersand (&)
- Apostrophe (')
- Plus sign (+)
- Quotation mark (")
- Braces ({ })
- Backslash (\)

## How do I export an agents documents?

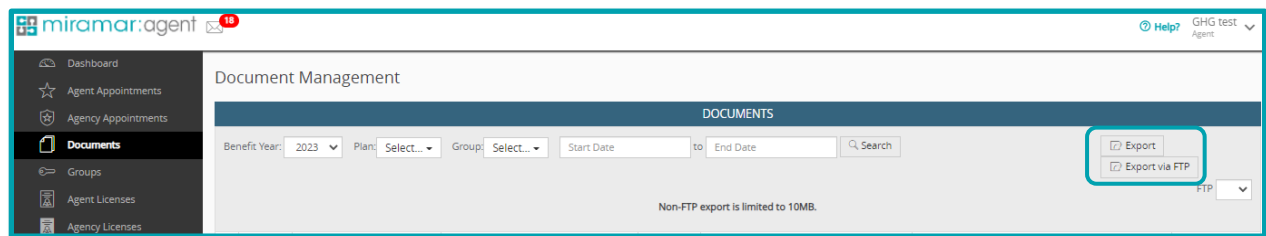
You have the ability to export an individual document by clicking into the documents ID number.

To export documents in bulk, you can export a limited amount of documents locally to the browser by checking off the boxes next to the report ID and clicking **Export**. This is limited by the size of reports, so you may only be able to download a few at a time.

You can also export an unlimited amount of reports by checking off the boxes next to the report ID, selecting the FTP that you want it to deliver to and clicking **Export via FTP**.

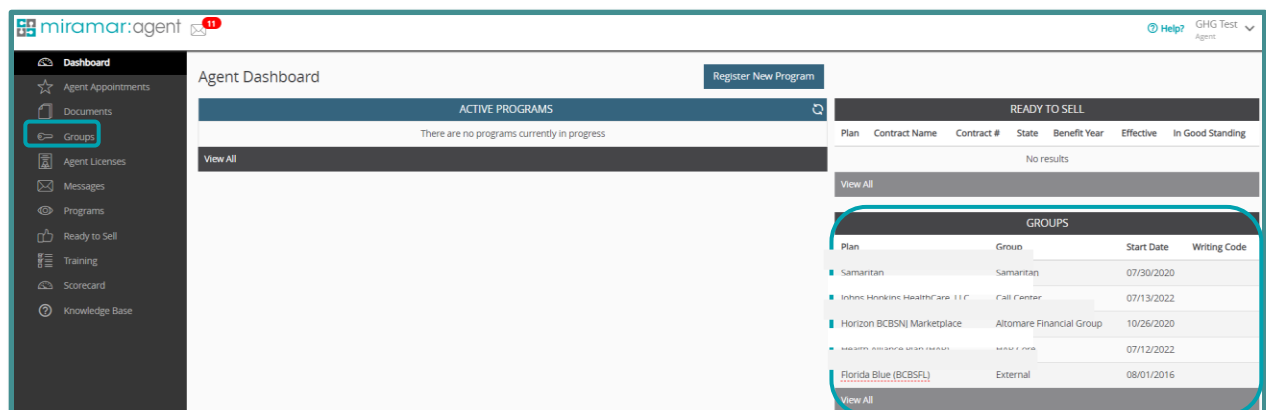


**IMPORTANT NOTE:** If you do not have an FTP set up for delivery of reports and documents within Miramar:Agent, please reach out to your designated Client Services Manager.



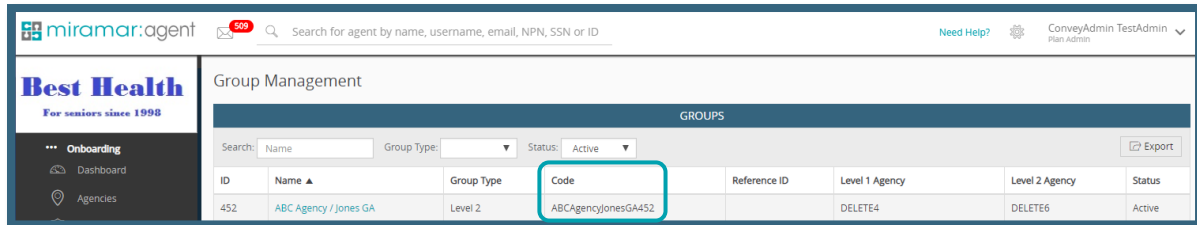
## GROUPS

To view an agent's full group history, including spans of previously associated groups, click **Groups** in the Agent Dashboard menu. To view the agent's current group affiliation, you can view the *Groups* widget on the Agent Dashboard.

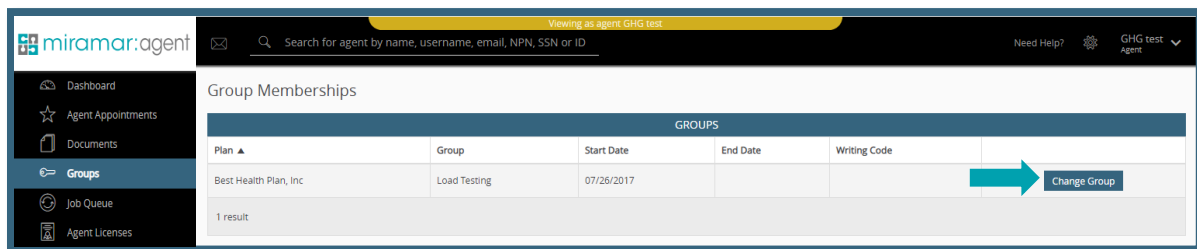


## How do I initiate a group change?

In order to change an agent's group, you will need the specific Group Code for the individual Group to which they are changing. This code can be found on the *Groups* index on your Plan Administrator dashboard.

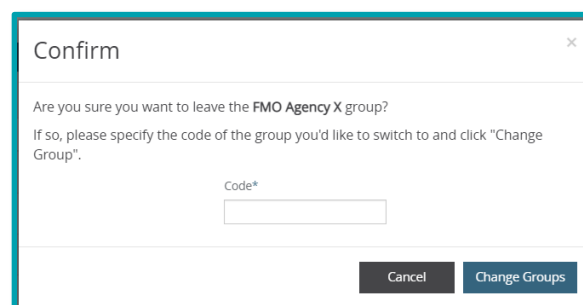


From the agents *Group Memberships* index, you can initiate a group change for an agent by clicking **Change Group** next to the agent's current group.



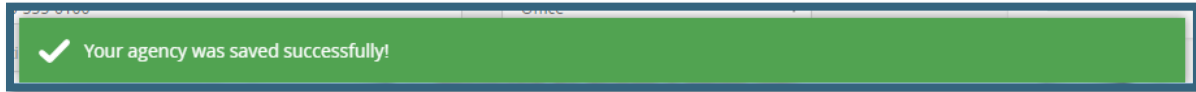
Once you have clicked Change Group, a confirmation box will pop up on the screen. You will need to enter the *Group Code* for the group to which you are wanting to change. This is found on the Group Management index.

Enter the Group Code and click **Search**.



Click **Cancel** at any time to return to the agent information page.

If the group code you entered is valid, you will get the confirmation in green.



If the group code you entered is invalid, you will get the error message in red below. Refer to the Group Management index to confirm the group code.

Confirm

Are you sure you want to leave the **FMO Agency X** group?

If so, please specify the code of the group you'd like to switch to and click "Change Group".

Code\*

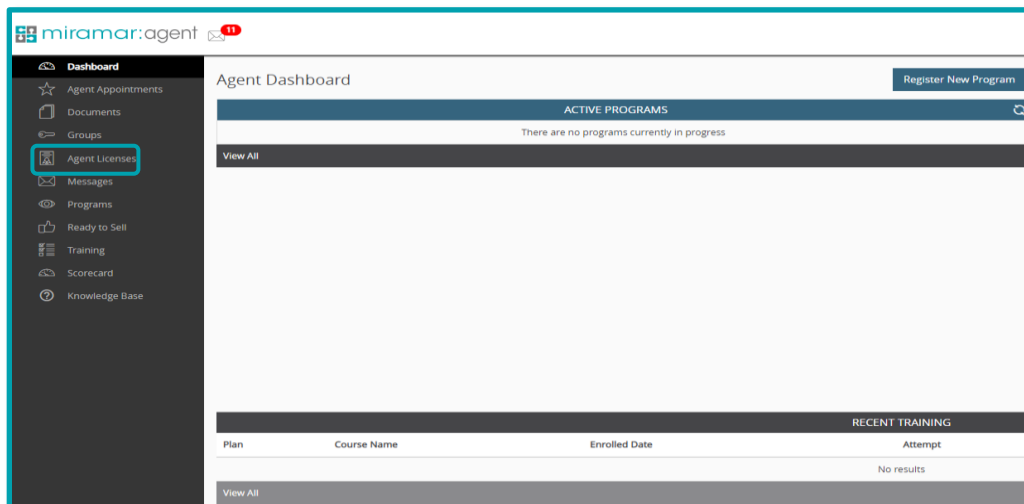
Could not find the group associated with the specified code.

Cancel

Change Groups

## LICENSES

To view an agent's licenses, click **Licenses** in the Agent Dashboard menu to the left of the screen.





License information is refreshed on a daily basis.

Agent License Management						
AGENT LICENSES						
<a href="#">Export</a>						
State ▲	License #	License Class	Line of Authority	Effective Date	Expiration Date	Status
AL	3000710366	3 - Insurance Producer	935 - Accident & Health or Sickness	11/05/2019	02/28/2025	✓ Active
AR	19227076	3 - Insurance Producer	935 - Accident & Health or Sickness	09/11/2019	02/28/2025	✓ Active
AZ	19227076	89 - Insurance Producer	935 - Accident & Health or Sickness	09/11/2019	02/28/2027	✓ Active
CA	4002033	9354 - NON RESIDENT INSURANCE PRODUCER	3773 - ACCIDENT AND HEALTH AGENT	09/06/2019	09/30/2023	✗ Expired
CA	4002033	3 - Insurance Producer	935 - Accident & Health or Sickness	09/06/2019	09/30/2023	✓ Active
CO	617669	3 - Insurance Producer	823 - Accident and Health	09/12/2019	02/28/2025	✓ Active
CT	19227076	3 - Insurance Producer	935 - Accident & Health or Sickness	09/11/2019	02/28/2025	✓ Active
DC	3002123010	3 - Insurance Producer	935 - Accident & Health or Sickness	09/02/2022	02/29/2024	✓ Active
DE	3000645699	3 - Insurance Producer	39 - Health	09/12/2019	02/28/2025	✓ Active
FL	W597278	1 - Agent	39 - Health	09/19/2019		✓ Active
39 results						
Show: 10 items				1 of 4		

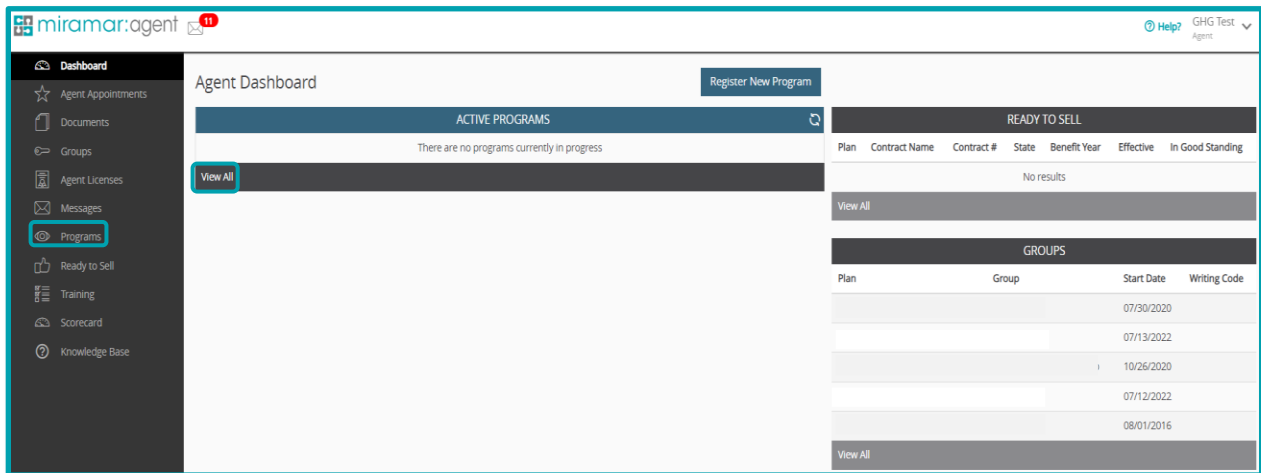
## MESSAGES

To view an agent's messages sent to or from your plan, click into **Messages** on the Agent Dashboard menu or into the *envelope icon* at the top of the page.

miramar:agent		Agent Dashboard		Register New Program	
Dashboard		ACTIVE PROGRAMS		READY TO SELL	
Agent Appointments		There are no programs currently in progress		Plan Contract Name Contract # State Benefit Year Effective In Good Standing	
Documents		View All		No results	
Groups				View All	
Agent Licenses				GROUPS	
Messages				Plan Group Start Date Writing Code	
Programs					
Ready to Sell				07/30/2020	
Training				07/13/2022	
Scorecard				10/26/2020	
Knowledge Base				07/12/2022	
				08/01/2016	
				View All	

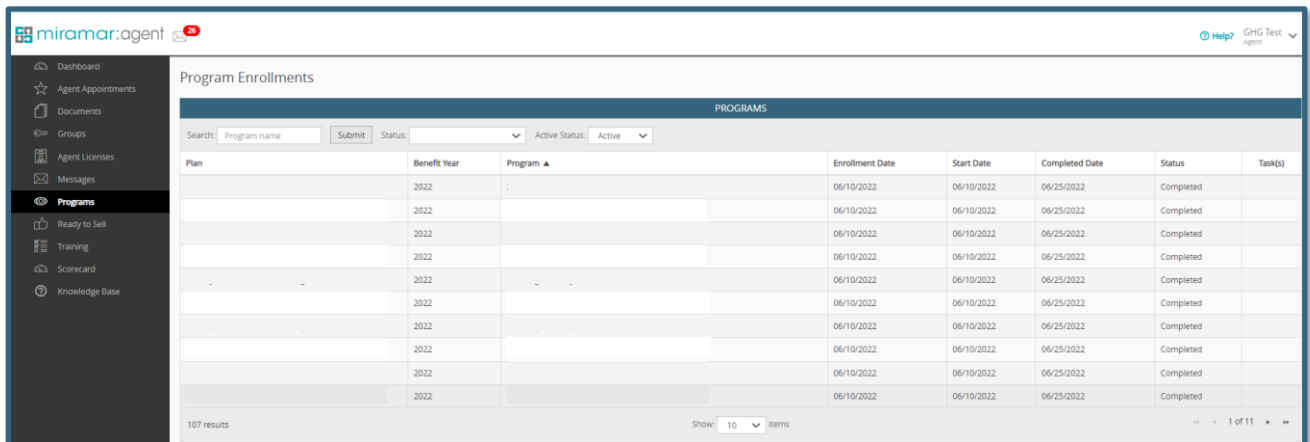
## PROGRAMS

The agent's active, not started, or in-progress programs will appear on the Agent Dashboard under *Active Programs*. To view all programs, including completed or frozen programs, click **View All** under the Active Programs widget or **Programs** from the Agent Dashboard menu.



The screenshot shows the 'miramar:agent' dashboard. On the left is a sidebar menu with options: Dashboard, Agent Appointments, Documents, Groups, Agent Licenses, Messages, **Programs** (highlighted), Ready to Sell, Training, Scorecard, and Knowledge Base. The main content area is titled 'Agent Dashboard' and includes a 'Register New Program' button. It features three widgets: 'ACTIVE PROGRAMS' (showing 'There are no programs currently in progress' and a 'View All' button), 'READY TO SELL' (a table with columns: Plan, Contract Name, Contract #, State, Benefit Year, Effective, In Good Standing, and a 'View All' button), and 'GROUPS' (a table with columns: Plan, Group, Start Date, Writing Code, and a 'View All' button).

From the *Program Enrollments* index, you can search by program name and filter by program status. From this index, you have insight into when the agent was enrolled, when they started, when they completed, and if they are in progress, and what their current tasks are.



The screenshot shows the 'Program Enrollments' index in the 'miramar:agent' system. It includes a search bar for 'Program name' and a filter for 'Active Status' set to 'Active'. The table displays the following data:

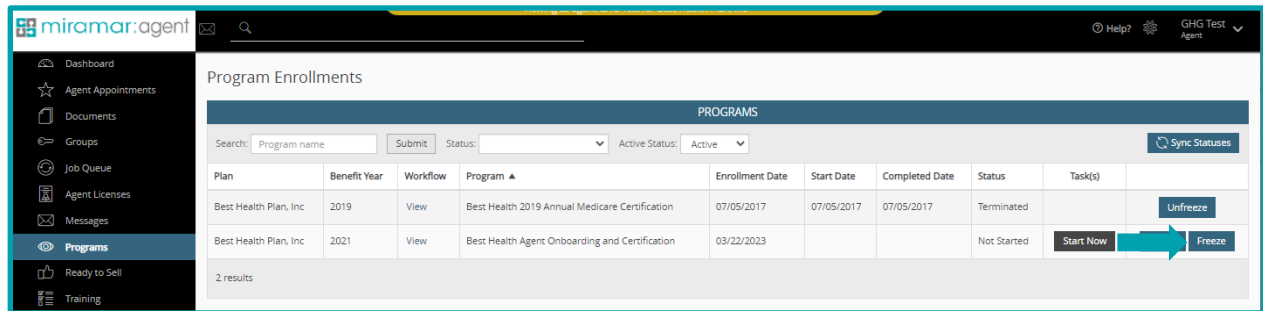
Plan	Benefit Year	Program	Enrollment Date	Start Date	Completed Date	Status	Task(s)
	2022		06/10/2022	06/10/2022	06/25/2022	Completed	
	2022		06/10/2022	06/10/2022	06/25/2022	Completed	
	2022		06/10/2022	06/10/2022	06/25/2022	Completed	
	2022		06/10/2022	06/10/2022	06/25/2022	Completed	
	2022		06/10/2022	06/10/2022	06/25/2022	Completed	
	2022		06/10/2022	06/10/2022	06/25/2022	Completed	
	2022		06/10/2022	06/10/2022	06/25/2022	Completed	
	2022		06/10/2022	06/10/2022	06/25/2022	Completed	
	2022		06/10/2022	06/10/2022	06/25/2022	Completed	
	2022		06/10/2022	06/10/2022	06/25/2022	Completed	

At the bottom, it indicates '107 results' and a 'Show: 10 items' option.

### How do I freeze/unfreeze an agent's program?

As a plan manager, you have the ability to freeze or unfreeze an agent's program. To freeze a program means you are no longer allowing the agent to action the program, and you can unfreeze at any time.

Click **Freeze** to the right of the appropriate program. This change will be immediate, however, it can be reversed at any time by clicking **Unfreeze** next to a frozen program.



**Program Enrollments**

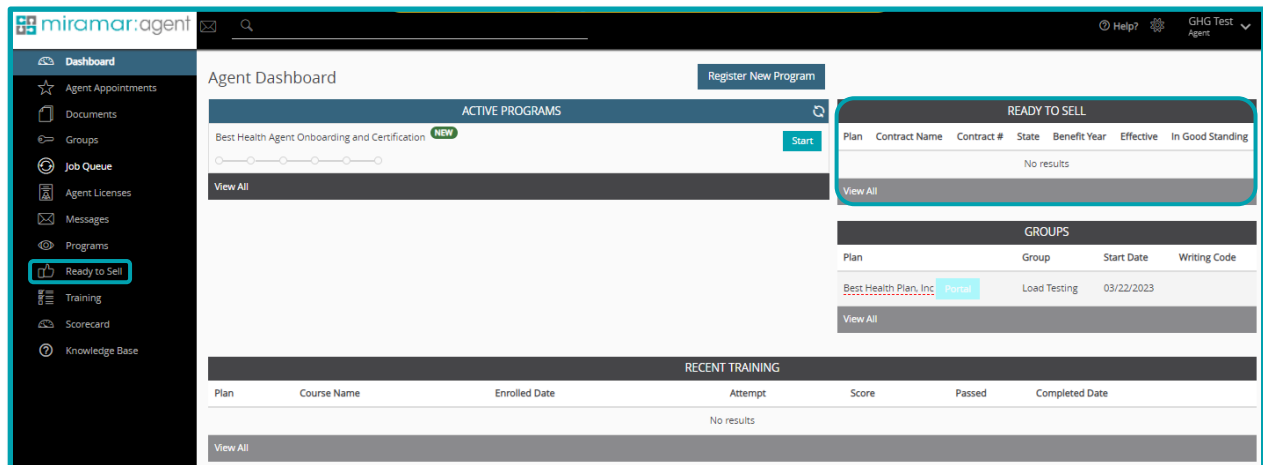
Search:  Program name  Status:  Active Status:

Plan	Benefit Year	Workflow	Program	Enrollment Date	Start Date	Completed Date	Status	Task(s)	
Best Health Plan, Inc.	2019	View	Best Health 2019 Annual Medicare Certification	07/05/2017	07/05/2017	07/05/2017	Terminated		<input type="button" value="Unfreeze"/>
Best Health Plan, Inc.	2021	View	Best Health Agent Onboarding and Certification	03/22/2023			Not Started		<input type="button" value="Start Now"/> <input type="button" value="Freeze"/>

2 results

## READY TO SELL

To view the agent's most current RTS status, view the *Ready to Sell* widget on the right side of the Agent Dashboard. To view a full history of the agent's RTS status, click into **View All** from the Ready to Sell widget or **Ready to Sell** from the Agent Dashboard menu.



**Agent Dashboard**

**ACTIVE PROGRAMS**

Best Health Agent Onboarding and Certification NEW

**READY TO SELL**

Plan	Contract Name	Contract #	State	Benefit Year	Effective	In Good Standing
No results						

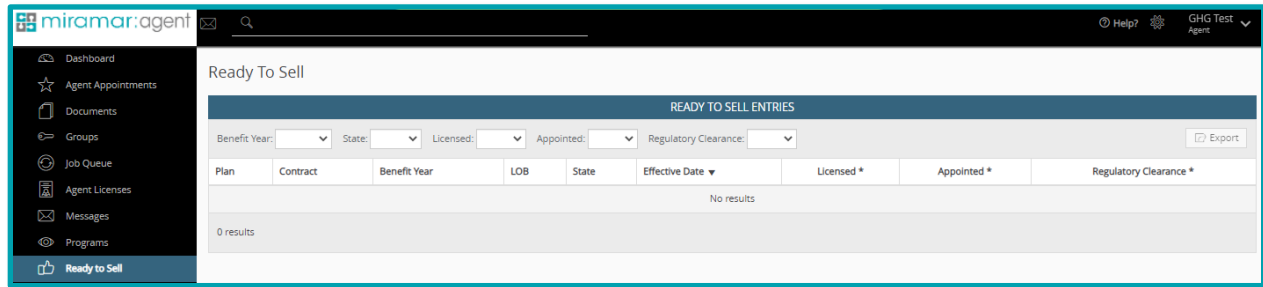
**GROUPS**

Plan	Group	Start Date	Writing Code
Best Health Plan, Inc.	Partial	Load Testing	03/22/2023

**RECENT TRAINING**

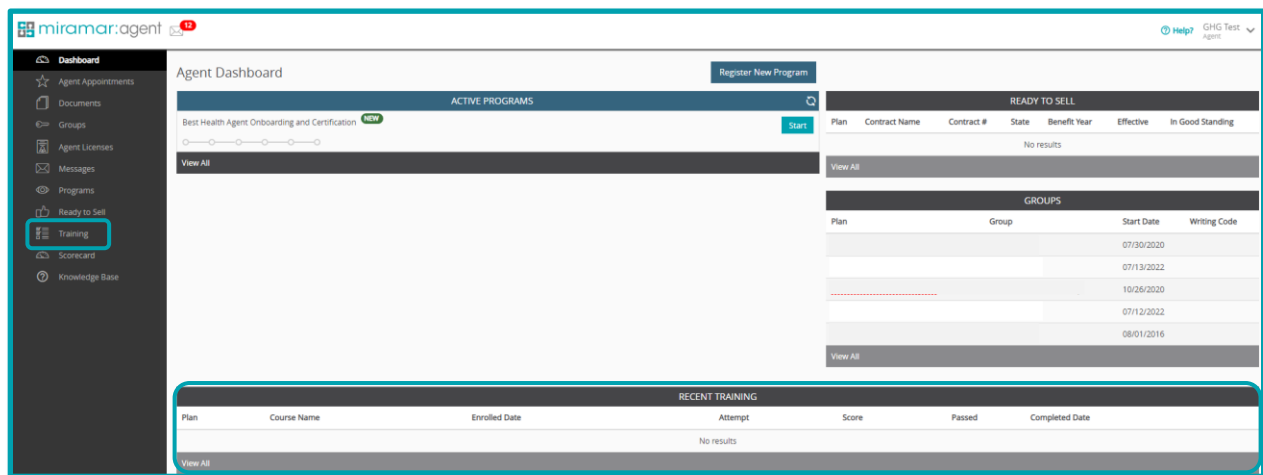
Plan	Course Name	Enrolled Date	Attempt	Score	Passed	Completed Date
No results						

From the Ready to Sell index, you can filter by Benefit Year and State.



## AGENT TRAINING

To view the agent's most recent training information, view the *Recent Training* widget on the bottom of the Agent Dashboard. To view a full history of the agent's training information, click into **View All** from the Training widget or **Training** from the Agent Dashboard menu.



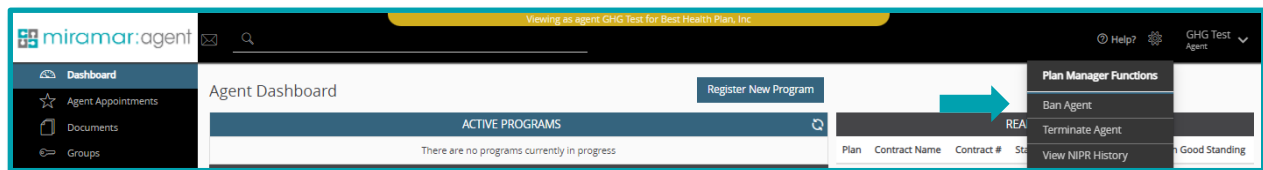
From the Agent Training index, you can search by course name or filter by benefit year or passed status.

AGENT TRAINING									
<div> <div>Search: <input type="text" value="Course name"/></div> <div>Plan: <input type="text"/></div> <div>Benefit Year: <input type="text"/></div> <div>Passed: <input type="text"/></div> <div>Export</div> </div>									
ID	Plan	Benefit Year	Course ID	Course Name	Enrolled Date ▲	Attempts Used	Score	Completed Date	Passed
468107		2022	1936	TEST 2023 Core Medicare Training	05/24/2022	1	100	05/24/2022	Yes
468108		2022	1972	TEST Fraud Waste and Abuse Training	05/24/2022	1	100	05/25/2022	Yes
468130		2022	1970	TEST Compliance Training	05/25/2022	1	100	05/25/2022	Yes

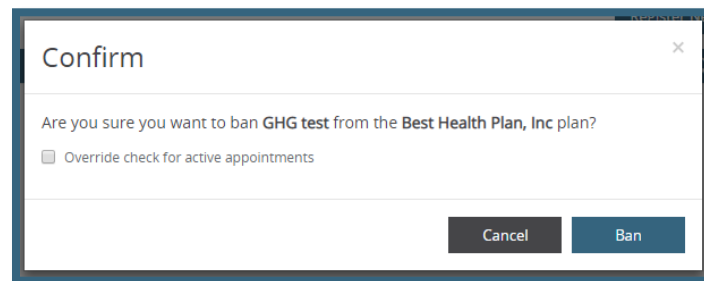
## BANNING AN AGENT

Plan managers have the ability to ban an agent. Banning an agent will prevent the agent from registering for the plan or completing any of the plan's active certification programs. It will also end the agent's group affiliation and writing codes with your plan.

To ban an agent, click on the gear icon  and select **Ban Agent**.




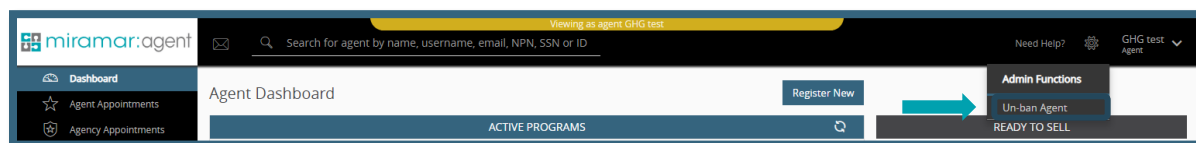
A pop-up will ask you to confirm you want to ban the agent.



You have the option to override the check for active appointments. If you choose to override the check and continue to ban the agent, you will no longer have the ability to process appointment terminations in Miramar:Agent for this agent while he or she remains banned.

Once you click **Ban**, the system will process your request. Banned agents are no longer affiliated with your plan and will not be permitted to register for your programs.

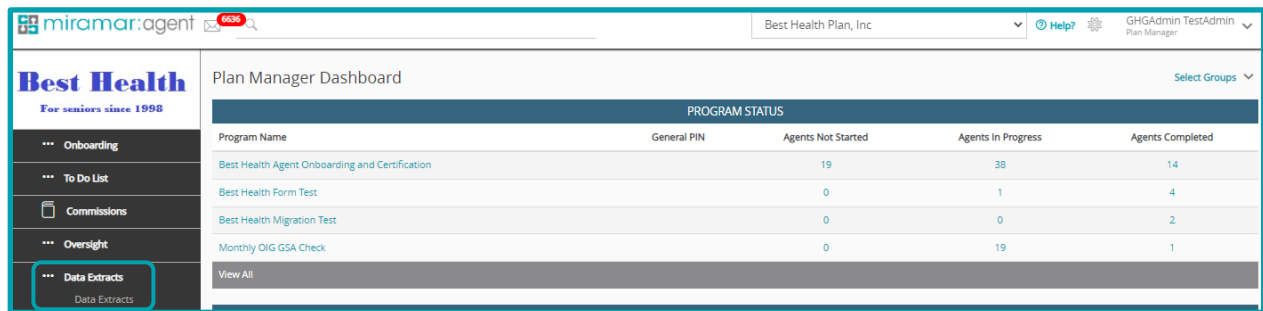
You can also undo the ban. To do so, click on the gear icon  and select **Un-ban Agent**.



## DATA EXTRACTS

## REPORT MANAGEMENT

Miramar:Agent offers a robust reporting engine where you are able to build and customize your own reports. To manage data extracts or reports, click **Data Extracts** in the Onboarding menu to the left of the Dashboard. Once you have clicked into *Data Extracts*, you will be able to view the Data Extract Management index.

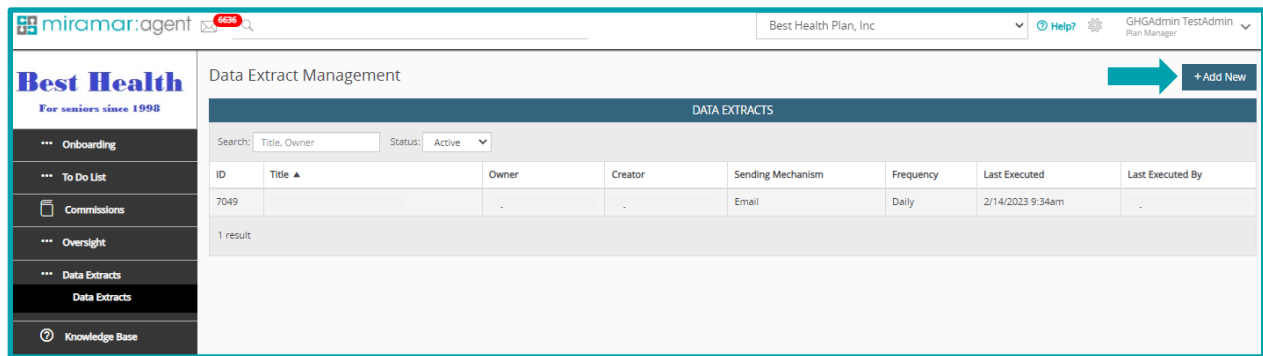


Plan Manager Dashboard

PROGRAM STATUS				
Program Name	General PIN	Agents Not Started	Agents In Progress	Agents Completed
Best Health Agent Onboarding and Certification		19	38	14
Best Health Form Test		0	1	4
Best Health Migration Test		0	0	2
Monthly OIG GSA Check		0	19	1
View All				

### How do I create a new report?

To create a new report, from the Data Extract Management index, click **Add New**.



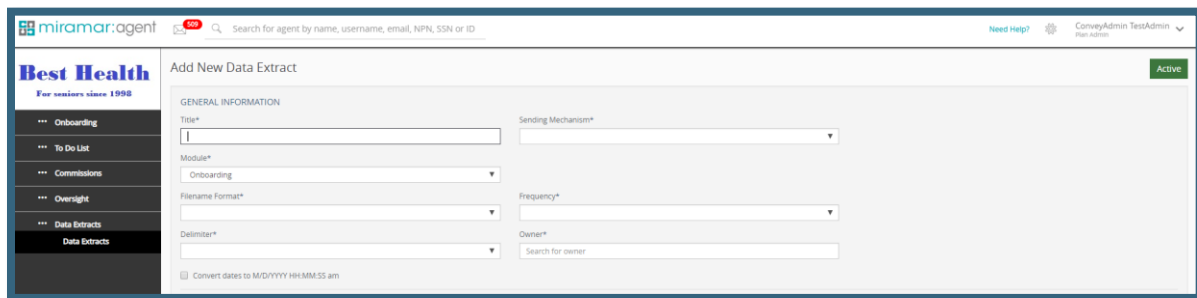
Data Extract Management

+ Add New

DATA EXTRACTS							
ID	Title ▲	Owner	Creator	Sending Mechanism	Frequency	Last Executed	Last Executed By
7049		-	-	Email	Daily	2/14/2023 9:34am	-

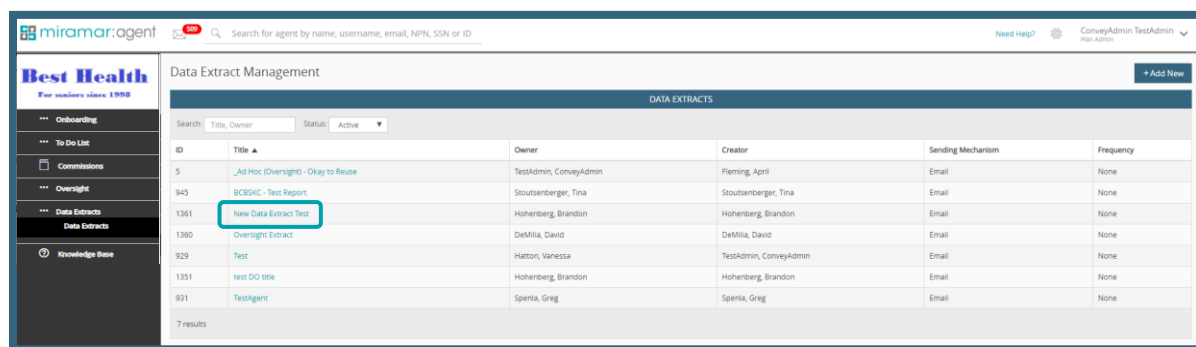
1 result

First, you will be required to fill out the information shown below. Once you have selected the delivery type and a frequency, you will be asked to add email recipients or select the FTP site from a pre-populated drop-down menu.



## How do I edit an existing report?

To edit an existing report, from the Data Extract Management index, click the title of the report to access the report setup screen.



ID	Title	Owner	Creator	Sending Mechanism	Frequency
5	Ad Hoc (Oversight) - Okay to Reuse	TestAdmin, ConveyAdmin	Fleming, April	Email	None
945	BCSBC - Test Report	Stoutenberg, Tina	Stoutenberg, Tina	Email	None
1361	New Data Extract Test	Hohenberg, Brandon	Hohenberg, Brandon	Email	None
1360	Oversight Extract	DeMilla, David	DeMilla, David	Email	None
929	Test	Hatton, Vanessa	TestAdmin, ConveyAdmin	Email	None
1351	test DO title	Hohenberg, Brandon	Hohenberg, Brandon	Email	None
931	TestAgent	Sparks, Greg	Sparks, Greg	Email	None

## ADDING FIELDS

Now that we have the general setup of the report complete, you will need to select the fields you want included in the report. To view the fields available under each category, click the category name to open.

To add a field to your report, double click the field from the Available Fields list, and it will add to the Included Fields list.

The title of the column will default to the field name, however, if you would like to name it something else, you are able to add a custom title by typing it in the blank text field next to the included field name.

Select fields from the Available Fields section by double-clicking them. You can then specify a label for each or select if you want to include the field in the data extract output (by clicking the checkbox) or only using it in a filter.

AVAILABLE FIELDS	INCLUDED FIELDS
<div>Agency Affiliation Info</div> <div>Agency Appointment Info</div> <div>Agency Banking Info</div> <div>Agency Info</div> <div>ID</div> <div>Agency Name</div> <div>Tax ID</div> <div>NPI</div> <div>Address Line 1</div> <div>Address Line 2</div> <div>City</div> <div>State</div> <div>Zip</div> <div>Phone</div> <div>Extension</div> <div>Broker Support Unit</div> <div>Agency Type</div> <div>Agency License</div> <div>Agency Marketplace</div>	<div>1. <input checked="" type="checkbox"/> Program Info - ProgramID</div>

## Configurable Fields

You have the ability to customize your reports with four available configurable fields.

The *Blank Field* will populate no data in that column. This may be used if you are adding in additional data from other sources after running the report.

The *Static Field* will populate with whatever value you enter in the text column to the right. Each line of data will contain the same value in that column.

The *Calculation Field* is used to concatenate certain fields together. For example, if you wanted one column to contain both first and last name, you would enter the following text: [Agent Profile – First Name] [Agent Profile – Last Name]

The *Logical Field* allows you to create a logical equation based on existing fields in the report.

When entering the field names into the text boxes, enter them with brackets surrounding each individual field title.



INCLUDED FIELDS

<input checked="" type="checkbox"/> Configurable Fields - Blank Field	<input type="text"/>	
<input checked="" type="checkbox"/> Configurable Fields - Static Field	<input type="text"/>	
<input type="text" value="Enter a literal value to be used in each row"/>		
<input checked="" type="checkbox"/> Configurable Fields - Calculation Field	<input type="text"/>	
Eg. [Agent Appointment Info - NAIC Code] - [Agent Appointment Info - State]		
<input checked="" type="checkbox"/> Configurable Fields - Logical Field	<input type="text"/>	
Eg. IF [Agent Appointment Info - State] = "PA" THEN "Pennsylvania" ELSE NULL		

## Custom Fields

Upon initial program setup, you may have requested certain data to be reportable within your programs. Any fields specific to your plan will appear under custom fields.

## FILTERING

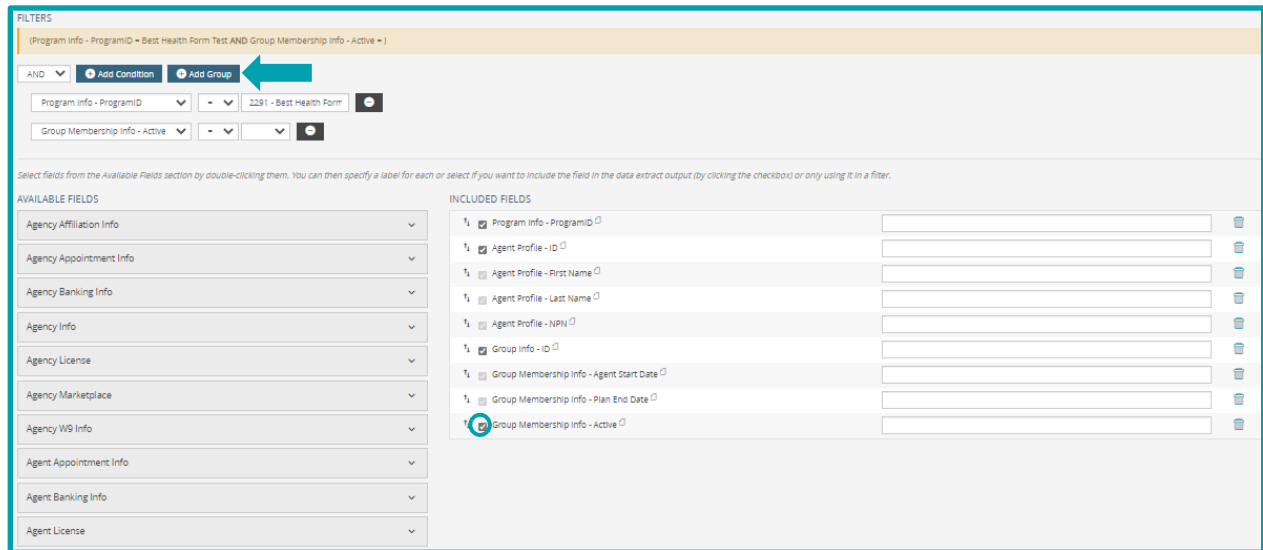
Certain fields within the data extract builder are filterable. After you have added your fields, if any are available to filter by, you will be able to select them from the filtering drop-down menu.

First, you will need to click **Add Condition**. Three drop-down lists will appear. The first list will give you your filterable field options. Select the one you would like to filter.

The second list will default to “equals,” however, depending on the field type, you may be able to select other options.

The last list will give you the options to which you will want to filter. Some are yes/no, and others you may need to type in what you wish to filter to (program name, group name, etc.).

Filterable fields do not necessarily need to appear on the report. If you do not wish a field to appear as a column on the report, simply uncheck the box next to the field name under Included Fields.



**FILTERS**  
(Program Info - ProgramID = Best Health Form Test AND Group Membership Info - Active =)

AND

Program Info - ProgramID  ☒

Group Membership Info - Active  ☒

Select fields from the Available Fields section by double-clicking them. You can then specify a label for each or select if you want to include the field in the data extract output (by clicking the checkbox) or only using it in a filter.

AVAILABLE FIELDS	INCLUDED FIELDS
Agency Affiliation Info	<input checked="" type="checkbox"/> Program Info - ProgramID
Agency Appointment Info	<input checked="" type="checkbox"/> Agent Profile - ID
Agency Banking Info	<input checked="" type="checkbox"/> Agent Profile - First Name
Agency Info	<input checked="" type="checkbox"/> Agent Profile - Last Name
Agency License	<input checked="" type="checkbox"/> Agent Profile - NPI
Agency Marketplace	<input checked="" type="checkbox"/> Group Info - ID
Agency WS Info	<input checked="" type="checkbox"/> Group Membership Info - Agent Start Date
Agent Appointment Info	<input checked="" type="checkbox"/> Group Membership Info - Plan End Date
Agent Banking Info	<input checked="" type="checkbox"/> Group Membership Info - Active
Agent License	

Conditions can also be grouped. For each group, you will need to define whether the logic is “And” or “Or”. Defining the group as “And” will require each row of data to contain only those elements.

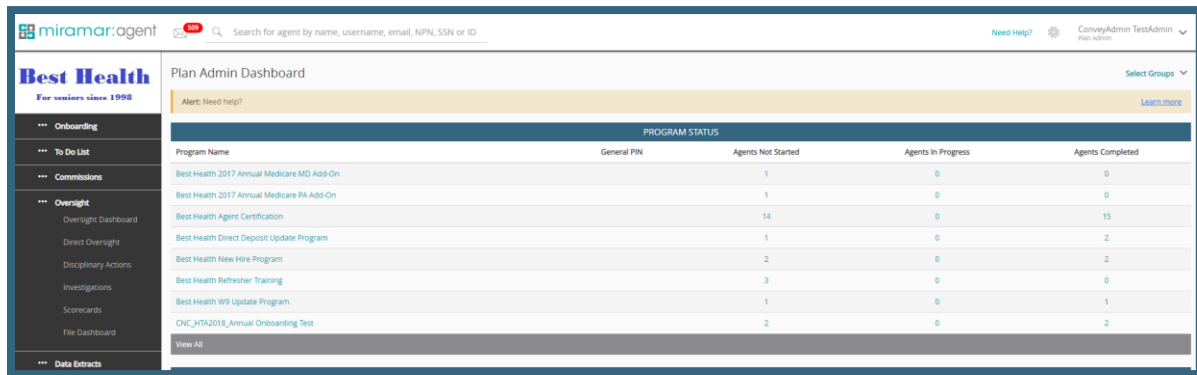
Let’s take, for example, the group of filters in the above screenshot. If we define the filters “Agent Profile – Test Users = No” and “Group Membership Info – Active = Yes” and have it defined as “And”, then we will only see agents who are not test users and have an active group.

If we define it as “Or”, then we would see any agent who is not a test user OR has an active group membership.

Defining a group as “Or” would most likely be used if you want to see multiple programs, trainings, or RTS selling states.

## OVERSIGHT

To manage agent oversight, click **Oversight** from the Onboarding menu to the left side of the screen, then click into one of the following categories: *Oversight Dashboard*, *Direct Oversight*, *Disciplinary Actions*, *Investigations*, or *Scorecards*.



PROGRAM STATUS				
Program Name	General PIN	Agents Not Started	Agents In Progress	Agents Completed
Best Health 2017 Annual Medicare MD Add-On		1	0	0
Best Health 2017 Annual Medicare PA Add-On		1	0	0
Best Health Agent Certification		14	0	15
Best Health Direct Deposit Update Program		1	0	2
Best Health New Hire Program		2	0	2
Best Health Refresher Training		3	0	0
Best Health W9 Update Program		1	0	1
CNC_HTA2018_Annual Onboarding Test		2	0	2
View All				

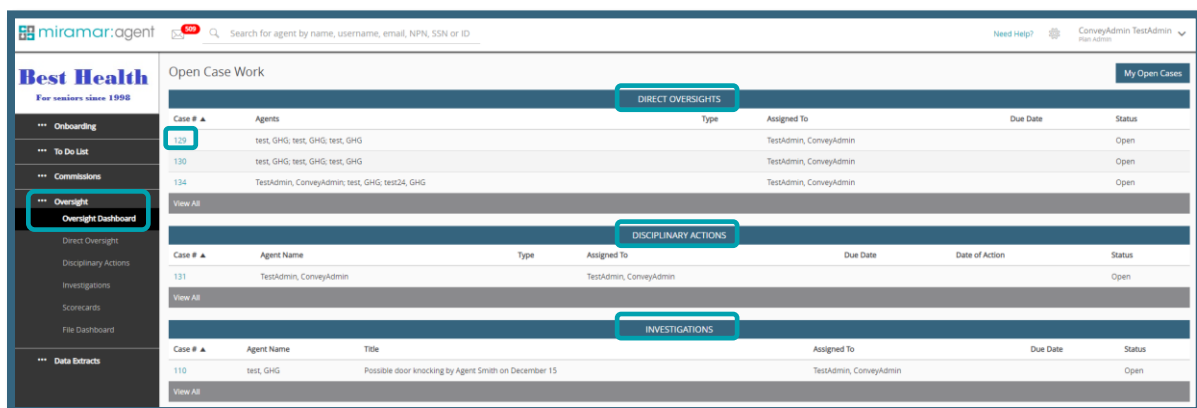


**NOTE:** Not all functionality may be available to all users. Individual access may be limited depending on the rights your organization has assigned each user.

## OVERSIGHT DASHBOARD

The *Oversight Dashboard* will provide a snapshot of your *Open Cases* for *Direct Oversight*, *Disciplinary Actions*, or *Investigations*.

To view all *Direct Oversight*, *Disciplinary Actions*, or *Investigations* cases, you may select a case from the *Oversight Dashboard* by clicking on the *Case #*, or you may select View All in the gray bar below each of the sections. The *Direct Oversight*, *Disciplinary Actions*, or *Investigations* options may also be selected from the *Oversight Dashboard* menu to the left of the screen.



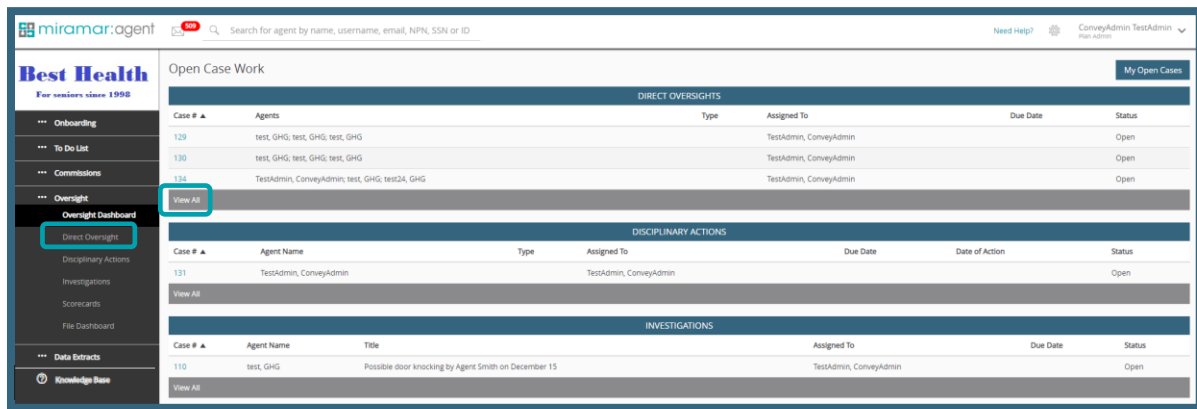
DIRECT OVERSIGHTS					
Case #	Agents	Type	Assigned To	Due Date	Status
129	test, GHG, test, GHG, test, GHG		TestAdmin, ConveyAdmin		Open
130	test, GHG, test, GHG, test, GHG		TestAdmin, ConveyAdmin		Open
134	TestAdmin, ConveyAdmin; test, GHG, test24, GHG		TestAdmin, ConveyAdmin		Open
View All					

DISCIPLINARY ACTIONS						
Case #	Agent Name	Type	Assigned To	Due Date	Date of Action	Status
131	TestAdmin, ConveyAdmin		TestAdmin, ConveyAdmin			Open
View All						

INVESTIGATIONS					
Case #	Agent Name	Title	Assigned To	Due Date	Status
110	test, GHG	Possible door knocking by Agent Smith on December 15	TestAdmin, ConveyAdmin		Open
View All					

## DIRECT OVERSIGHT

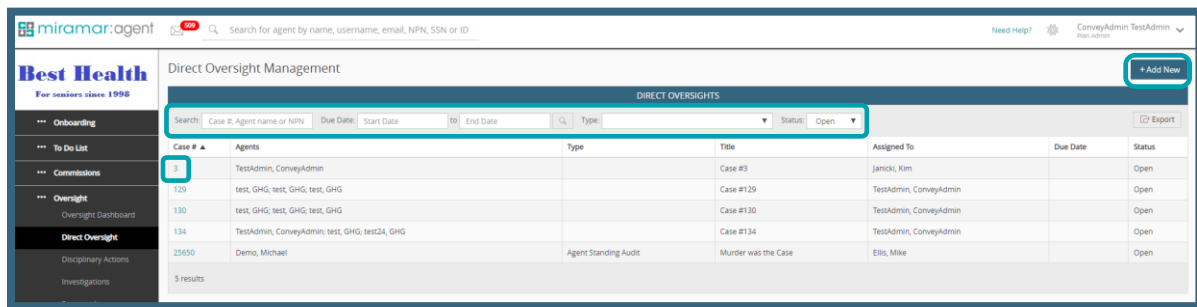
To manage Direct Oversight, proceed to the *Direct Oversight* section located on the Oversight Dashboard in the top center of the screen. Initially, the Direct Oversight will display a snapshot of your Direct Oversight cases. To see all of your Direct Oversight cases, click *View All* in the gray bar below the displayed cases. You may also click **Direct Oversight** in the Oversight Dashboard menu to the left of the screen to access your Direct Oversight cases.



You will then see all of your Direct Oversight cases. You may search by Case #, Agent Name, or NPN.

You may also filter by Due Date, Type (Plan Defined), or Status (Open or Closed).

To select a specific case to review or edit, click on the Case # on the left side of the screen.

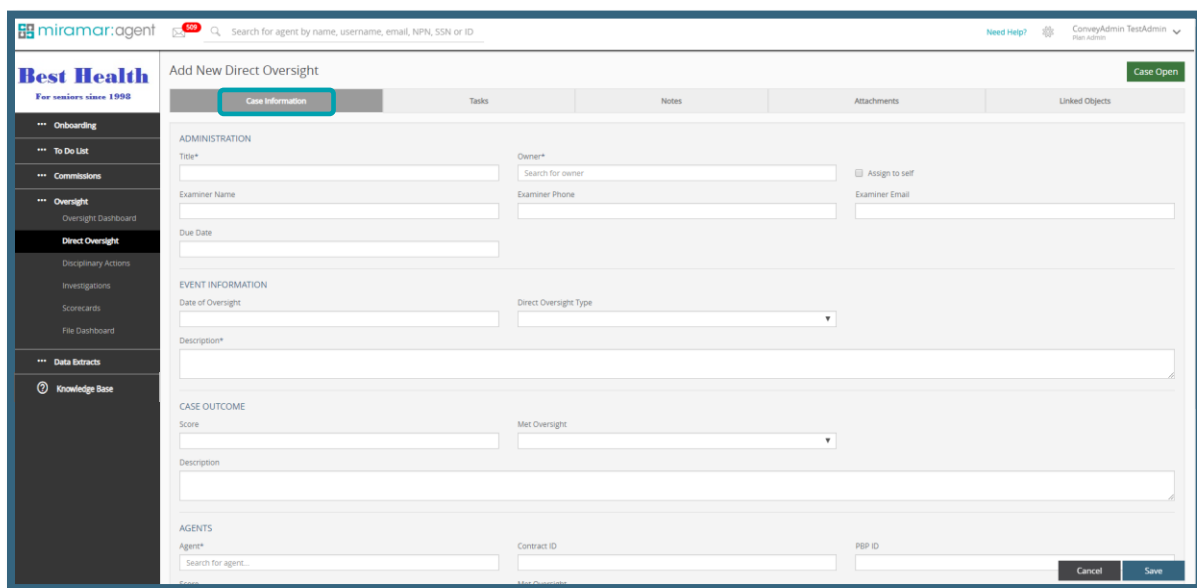



From this page, you may also add a new Direct Oversight case. To do so, click on **Add New** in the upper right corner of the screen. You will then be brought to the *Add New Direct Oversight* screen.

## Adding a New Direct Oversight

Once on the Add New Direct Oversight screen, you will be prompted to add the details of the case. To begin, enter the details of the case in the *Case Information* tab. The *Owner* and *Agent* fields will prefill as you begin typing, and you may select from the prefilled drop-down box. Once you have completed the details on the Case Information tab, click **Save** in the bottom right of the screen to assign a Case #, or click **Cancel** if you do not wish to save the changes.

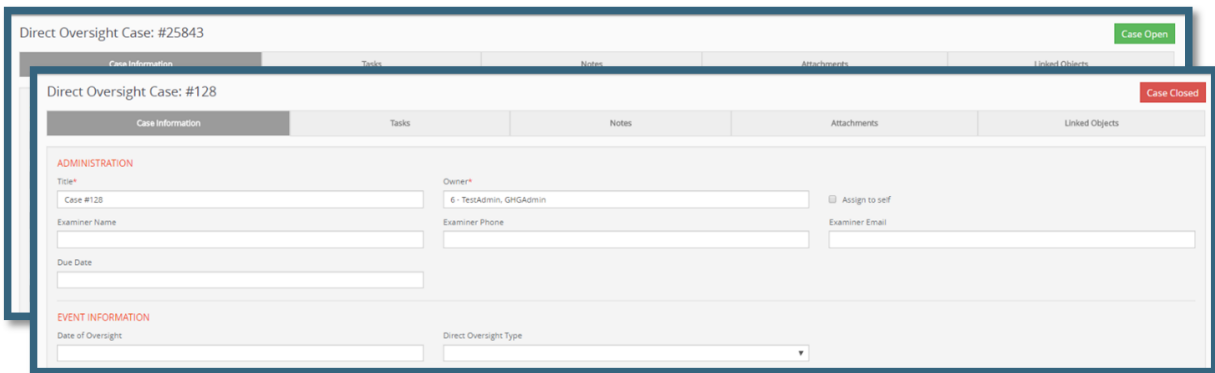
Please note the Tasks, Notes, Attachments, and Linked Objects tabs will not open until a Case # has been assigned. Once the Case Information tab has been completed and saved, you will be able to add additional information in these tabs.



 **QUICK TIP:** Required fields are identified with an asterisk (\*) throughout Miramar:Agent.

## Opening/Closing Cases

To open or close an existing case, simply click **Case Open** or **Case Closed** once in the case. The status of the case will be displayed at the top right corner.



Direct Oversight Case: #128

Case Information | Tasks | Notes | Attachments | Linked Objects

**ADMINISTRATION**

Title\* Case #128 Owner\* 6 - TestAdmin, GHGAdmin ☐ Assign to self

Examiner Name Examiner Phone Examiner Email

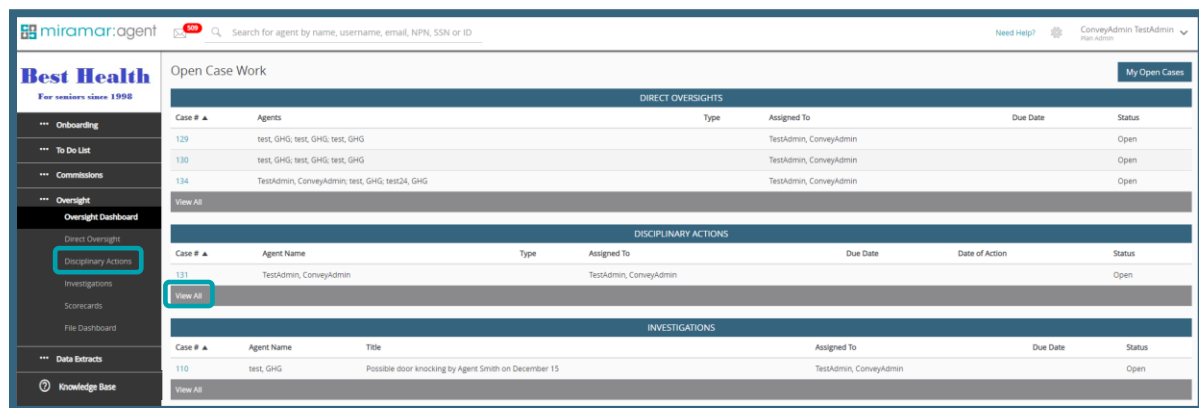
Due Date

**EVENT INFORMATION**

Date of Oversight Direct Oversight Type

## DISCIPLINARY ACTIONS

To manage *Disciplinary Actions*, proceed to the *Disciplinary Actions* section located on the Oversight Dashboard in the center of the screen. Initially, the *Disciplinary Actions* will display a snapshot of your *Disciplinary Action* cases. To see all of your *Disciplinary Actions* cases, click **View All** in the gray bar below the displayed cases. You may also click **Disciplinary Actions** in the Oversight Dashboard menu to the left of the screen to access your *Disciplinary Action* cases.



miramar:agent

Search for agent by name, username, email, NPN, SSN or ID

Need Help? ConveyAdmin TestAdmin

**Best Health**  
For members since 1998

Onboarding  
To Do List  
Commissions  
Oversight  
Oversight Dashboard  
Disciplinary Actions  
Investigations  
Scorecards  
File Dashboard  
Data Extracts  
Knowledge Base

Open Case Work

My Open Cases

**DIRECT OVERSIGHTS**

Case #	Agents	Type	Assigned To	Due Date	Status
129	test, GHG, test, GHG, test, GHG		TestAdmin, ConveyAdmin		Open
130	test, GHG, test, GHG, test, GHG		TestAdmin, ConveyAdmin		Open
134	TestAdmin, ConveyAdmin, test, GHG, test24, GHG		TestAdmin, ConveyAdmin		Open

View All

**DISCIPLINARY ACTIONS**

Case #	Agent Name	Type	Assigned To	Due Date	Date of Action	Status
131	TestAdmin, ConveyAdmin		TestAdmin, ConveyAdmin			Open

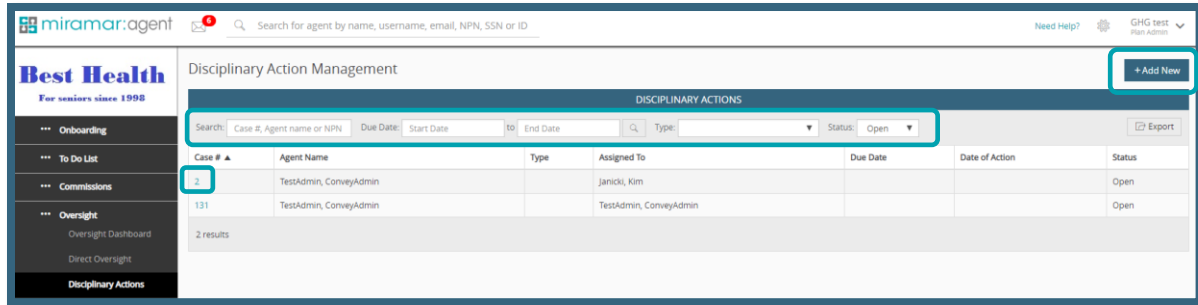
View All

**INVESTIGATIONS**

Case #	Agent Name	Title	Assigned To	Due Date	Status
110	test, GHG	Possible door knocking by Agent Smith on December 15	TestAdmin, ConveyAdmin		Open

View All

You will now see all of your *Disciplinary Action* cases. You may search by *Case #*, *Agent Name*, or *NPN*. You may also filter by *Due Date*, *Type* (Plan Defined), or *Status* (Open or Closed).



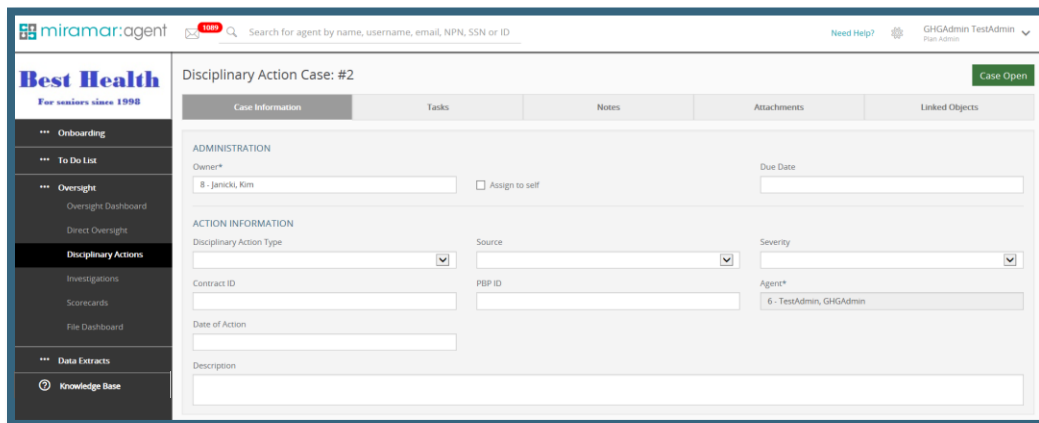
To select a specific case to review or edit, click on the *Case #* on the left side of the screen.

From this page, you may also add a new Disciplinary Action case. To do so, click on **Add New** in the upper right corner of the screen. You will then be brought to the *Add New Disciplinary Action* screen.

### Adding a New Disciplinary Action

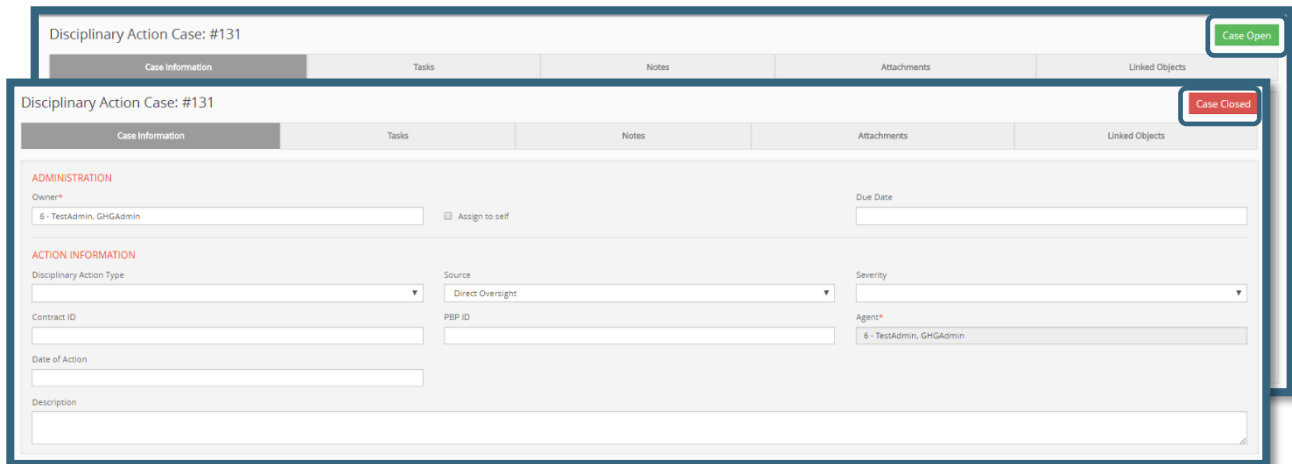
Once on the Add New Disciplinary Action screen, you will be prompted to add the details of the case. To begin, enter the details of the case in the *Case Information* tab. The *Owner* and *Agent* fields will prefill as you begin typing, and you may select from the drop-down box. Once you have completed the details on the *Case Information* tab, click **Save** in the bottom right of the screen to assign a Case #, or click **Cancel** if you do not wish to save your changes.

Please note the *Tasks*, *Notes*, *Attachments*, and *Linked Objects* tabs will not open until a Case # has been assigned. Once the *Case Information* tab has been completed and saved, you will be able to add additional information to these tabs.



## Opening/Closing Cases

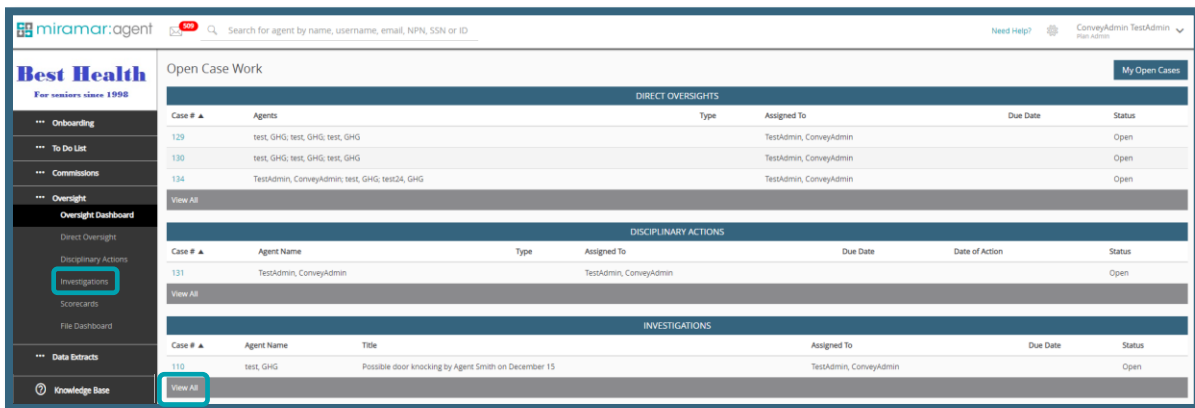
To open or close an existing case, simply click **Case Open** or **Case Closed** once in the case. The status of the case will be displayed at the top right corner.



## INVESTIGATIONS

To manage *Investigations*, proceed to the *Investigations* section located on the Oversight Dashboard in the bottom center of the screen. Initially, the *Investigations* will display a snapshot of your *Investigation* cases. To see all your *Investigation* cases, click **View All** in the gray bar below the displayed cases. You may also click **Investigations** in the Oversight Dashboard menu to the left of the screen to access your *Investigation* cases.

You will now see all of your *Investigation* cases. You may search by *Case #*, *Agent Name*, or *NPN*. You may also filter by Due Date or Status (Open or Closed).



Case #	Agents	Type	Assigned To	Due Date	Status
129	test, GHG, test, GHG, test, GHG		TestAdmin, ConveyAdmin		Open
130	test, GHG, test, GHG, test, GHG		TestAdmin, ConveyAdmin		Open
134	TestAdmin, ConveyAdmin; test, GHG; test24, GHG		TestAdmin, ConveyAdmin		Open

Case #	Agent Name	Type	Assigned To	Due Date	Date of Action	Status
131	TestAdmin, ConveyAdmin		TestAdmin, ConveyAdmin			Open

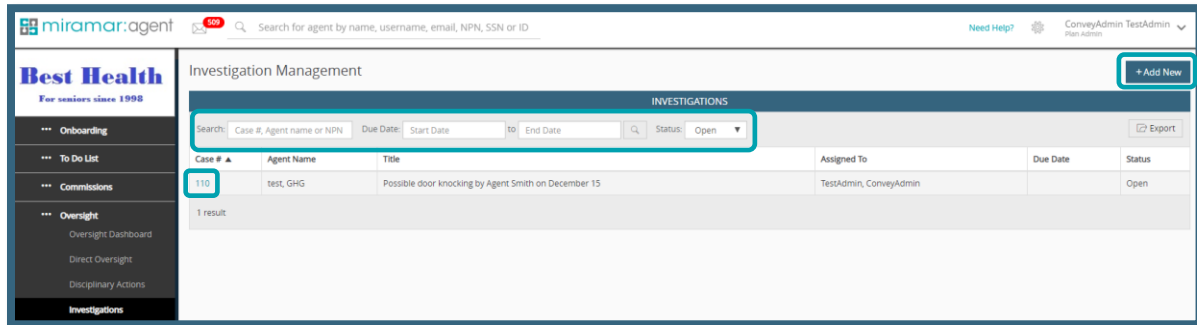
  

Case #	Agent Name	Title	Assigned To	Due Date	Status
110	test, GHG	Possible door knocking by Agent Smith on December 15	TestAdmin, ConveyAdmin		Open



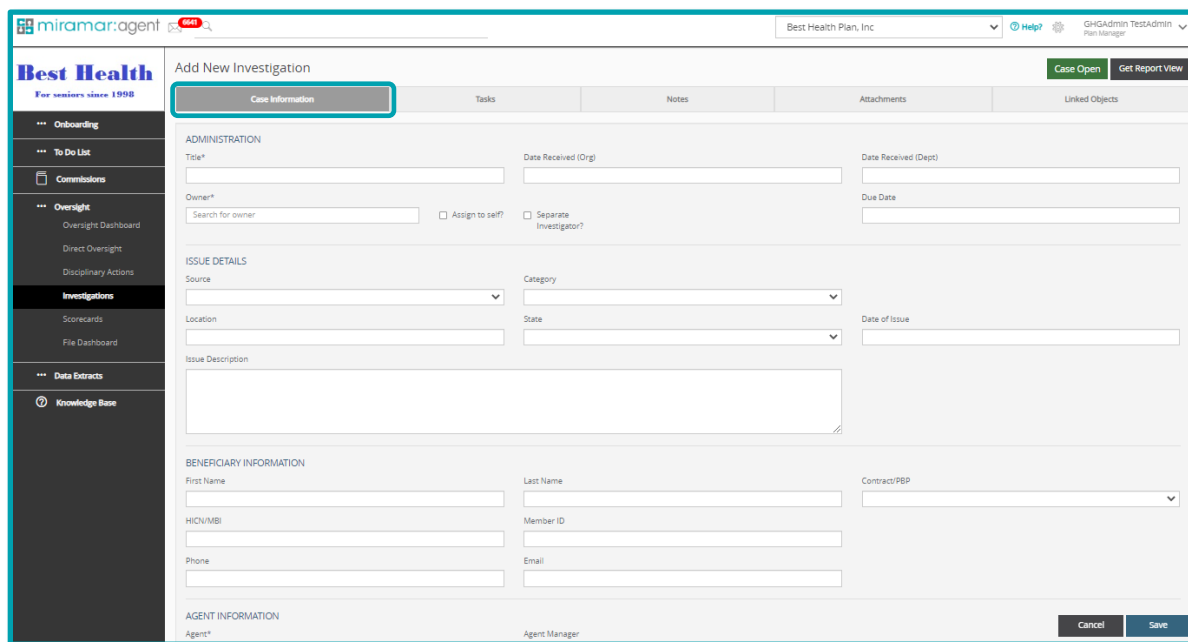
To select a specific case to review or edit, click on the *Case #* on the left side of the screen.

From this page, you may also add a new Investigation case. To do so, click on **Add New** in the upper right corner of the screen. You will then be brought to the Add New Investigation screen.



## Adding a New Investigation

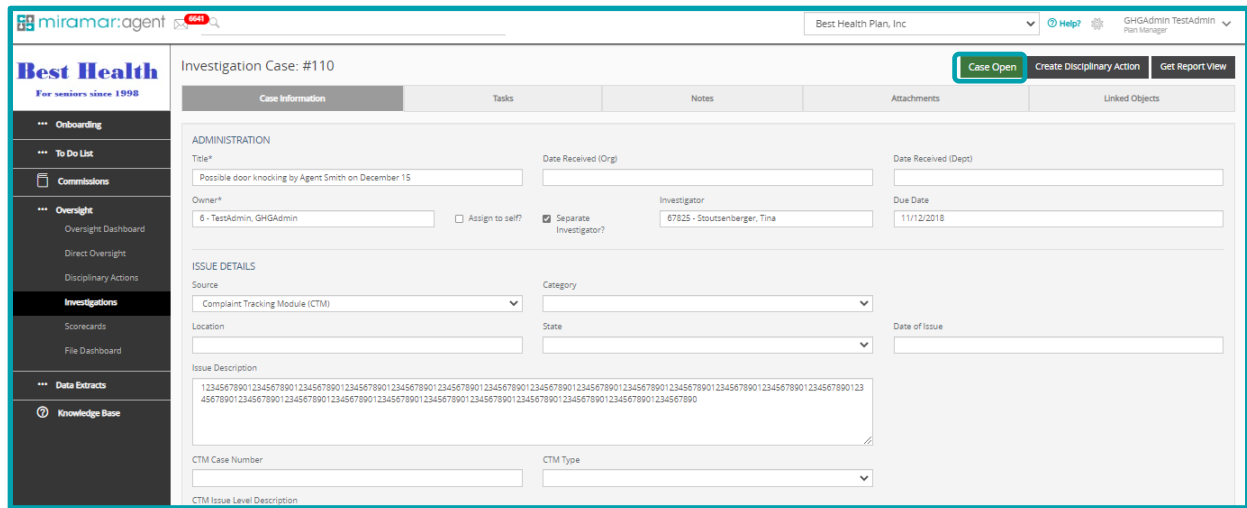
Once on the *Add New Investigation* screen, you will be prompted to add the details of the case. To begin, enter the details of the case in the *Case Information* tab. The *Owner* and *Agent* fields will prefill as you begin typing, and you may select from the drop-down box. Once you have completed the details on the *Case Information* tab, click **Save** in the bottom right of the screen to assign a Case #, or click **Cancel** if you do not wish to save your changes.



Please note the *Tasks*, *Notes*, *Attachments*, and *Linked Objects* tabs will not open until a Case # has been assigned. Once the *Case Information* tab has been completed and saved, you will be able to add additional information to these tabs.

## Opening/Closing Cases

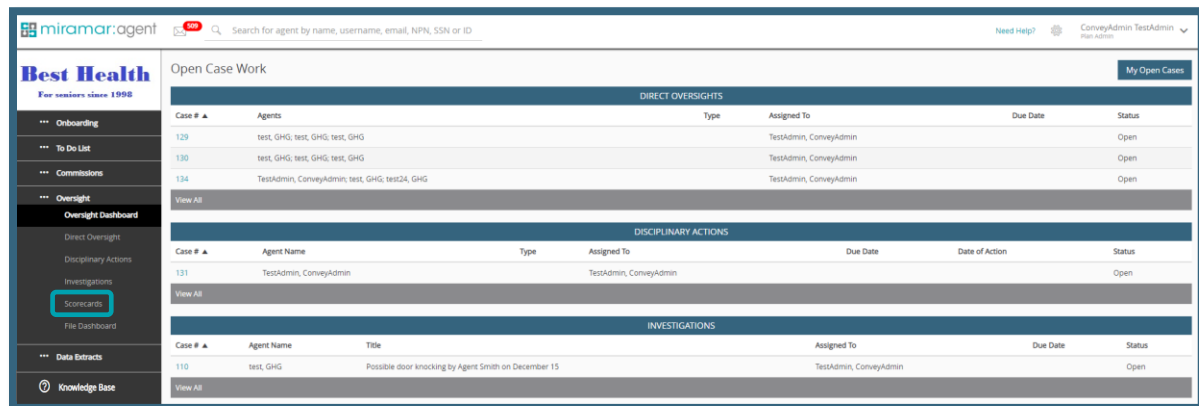
To open or close an existing case, simply click **Case Open** or **Case Closed** once in the case. The status of the case will be displayed at the top right corner.



## SCORECARDS

### Scorecard Management

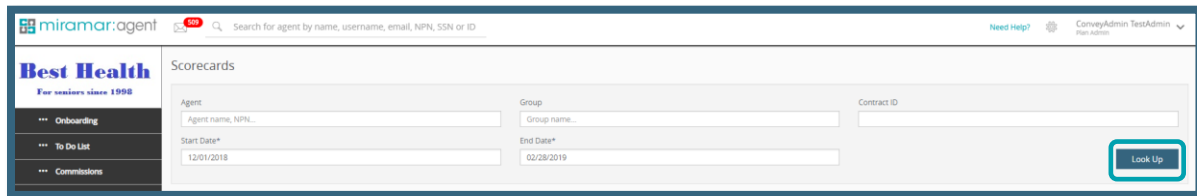
To view and manage Scorecards, click **Scorecards** in the Oversight Dashboard menu to the left of the screen.



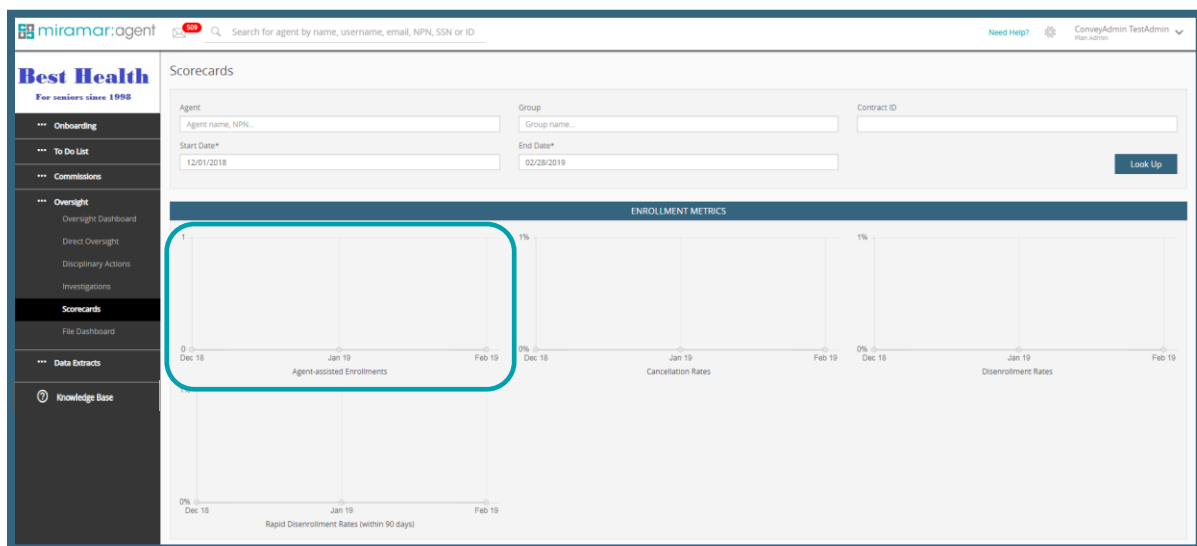
DIRECT OVERSIGHTS					
Case #	Agents	Type	Assigned To	Due Date	Status
129	test, GHG, test, GHG, test, GHG		TestAdmin, ConveyAdmin		Open
130	test, GHG, test, GHG, test, GHG		TestAdmin, ConveyAdmin		Open
134	TestAdmin, ConveyAdmin, test, GHG, test24, GHG		TestAdmin, ConveyAdmin		Open
View All					
DISCIPLINARY ACTIONS					
Case #	Agent Name	Type	Assigned To	Due Date	Date of Action
131	TestAdmin, ConveyAdmin		TestAdmin, ConveyAdmin		Open
View All					
INVESTIGATIONS					
Case #	Agent Name	Title	Assigned To	Due Date	Status
110	test, GHG	Possible door knocking by Agent Smith on December 15	TestAdmin, ConveyAdmin		Open
View All					

You may now search *Scorecards* by *Agent Name*, *Group Name*, and/or *Contract ID*. The *Agent* and *Group* fields will prefill as you begin typing, and you may select from the drop-down box.

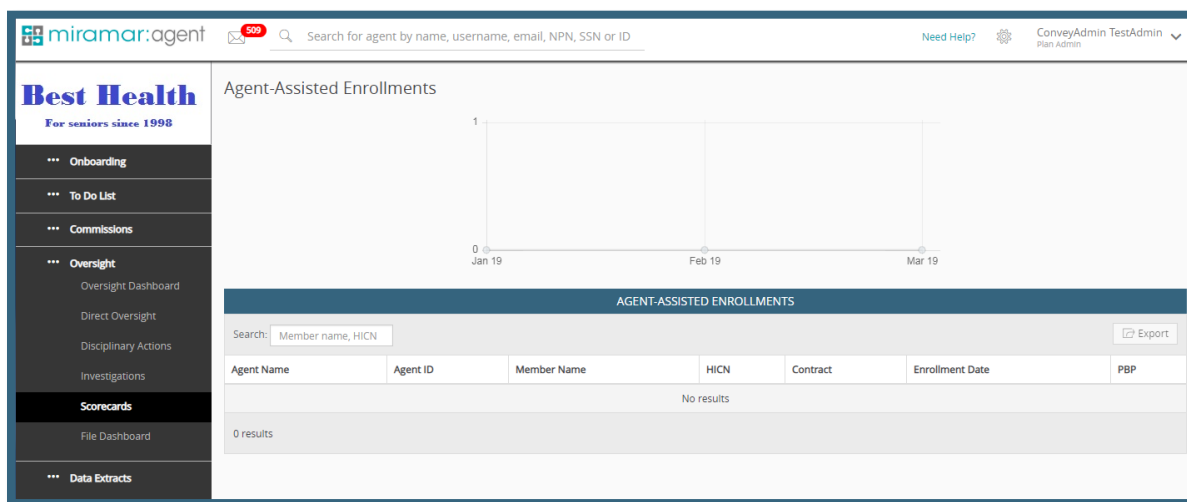
You must include a *Start Date* and *End Date* when searching for a *Scorecard*. Once you have entered the desired information, click **Look Up** to begin your search.



Once the data has been retrieved, you will be able to view a snapshot of the agent's details for both *Enrollment Metrics* and *Oversight Metrics* from the *Scorecards* screen.



You may also view additional details and/or export the data in a specific category of either the *Enrollment Metrics* or *Oversight Metrics* by clicking on that section.



From here, you may export the data by clicking **Export** on the far right of the screen. To return to the *Scorecard*, click **Cancel**.



**QUICK TIP:** For Enrollment metrics, *Application Date* is used for filtering. For Direct Oversight/Disciplinary Actions/Investigations records, *Created Date* is used for filtering.