Miramar:Agent
Plan Administrator User Guide

Rev. 7/2024

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INTRODUCTION

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*.

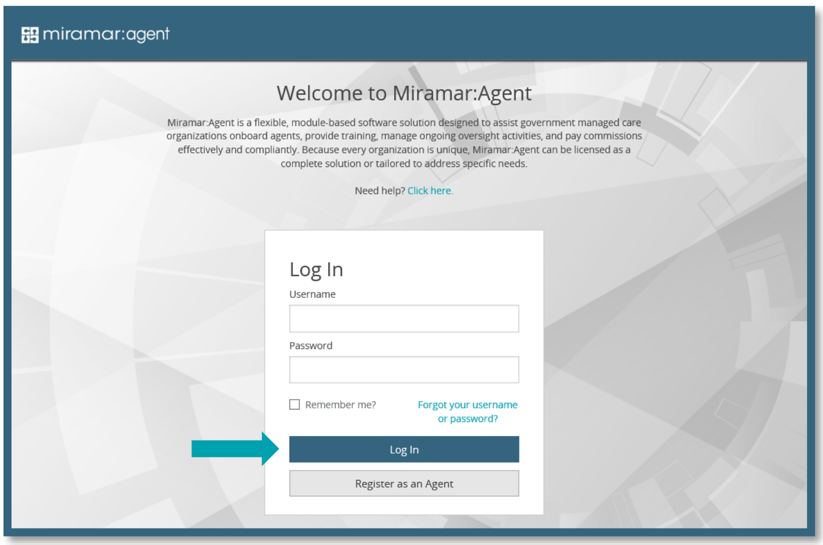
Information in this User Guide covers all functions and features of Miramar:Agent. Your available features and services may vary.

GETTING STARTED

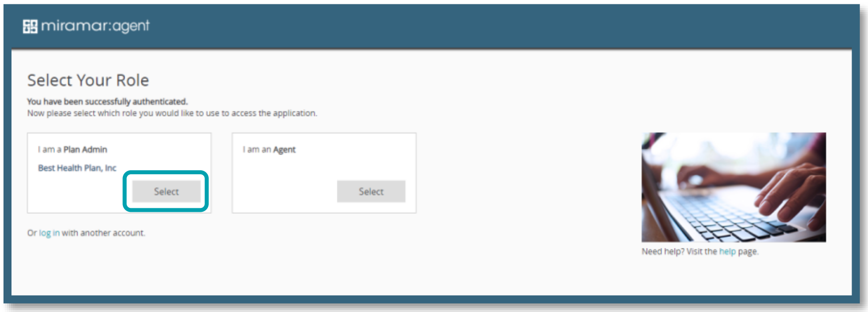
If you previously registered for an account as an agent and are a first-time administrator user, or if this is your first time accessing the system and you don't already have an account, contact your internal Miramar:Agent project manager to request plan administrator access.

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 and enter your username and password on the main landing screen. Click **Log In**.

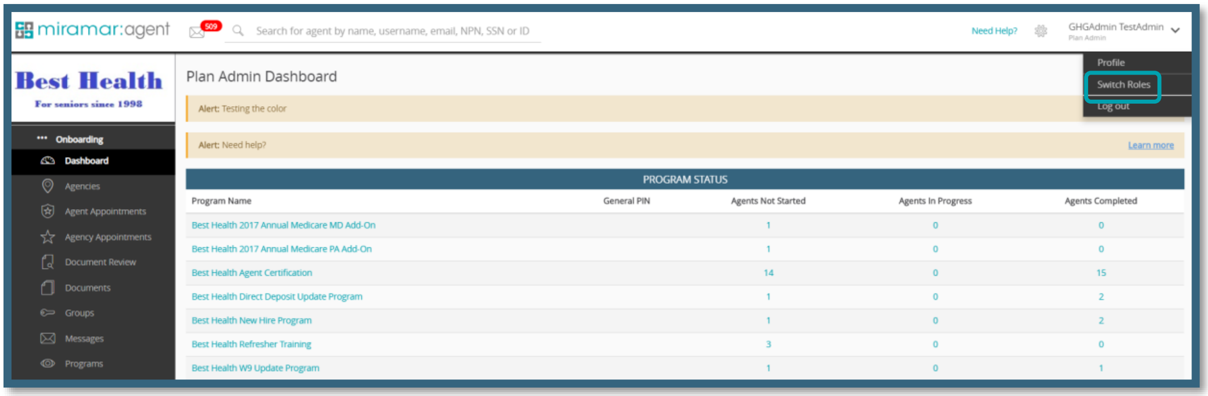


If you have both a plan administrator and an agent account, or you are a plan administrator for multiple plans, upon logging in, you will be asked to select which role you would like to use to access the system. Click **Select** next to the role you'd like to use.

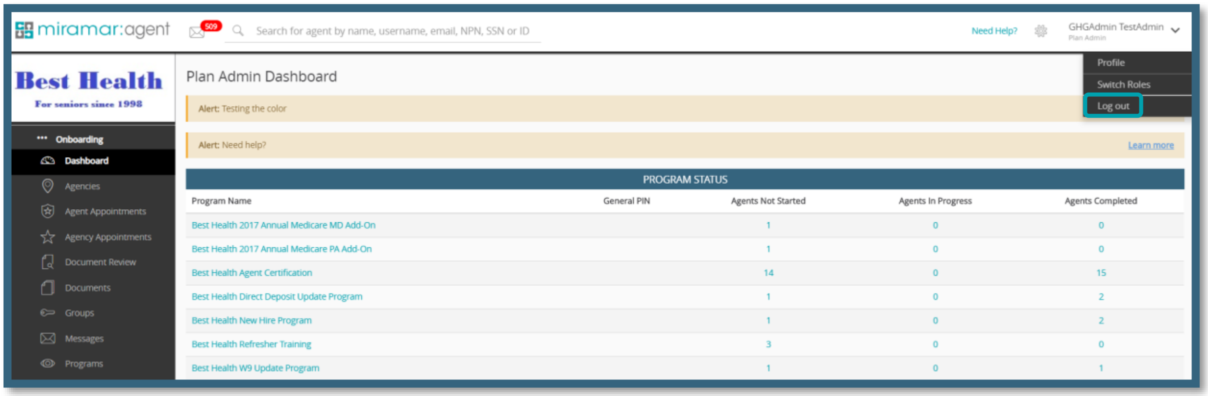


How do I switch roles?

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**.



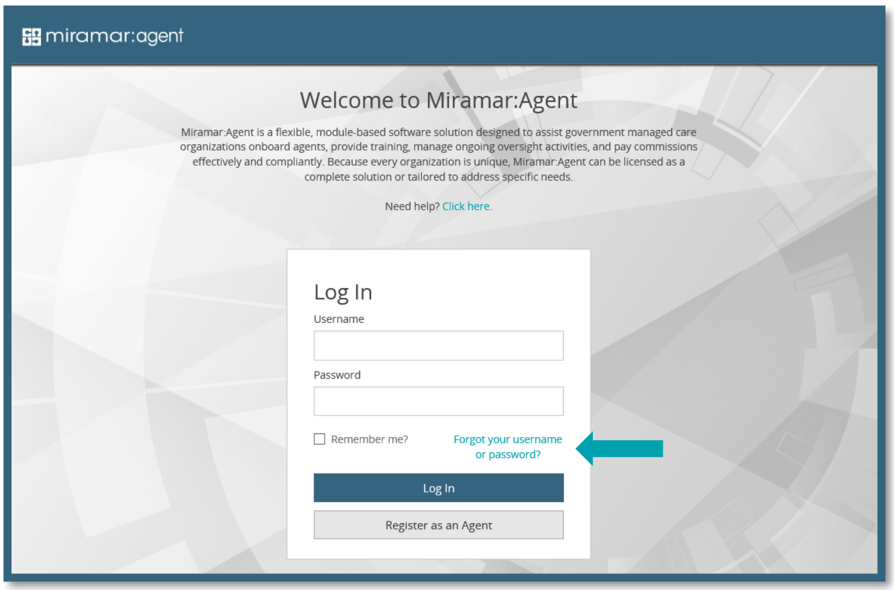
To log out of your account, place the cursor on your name in the upper right corner of the screen and click the down arrow to the right. Select **Log out** from the drop-down menu.

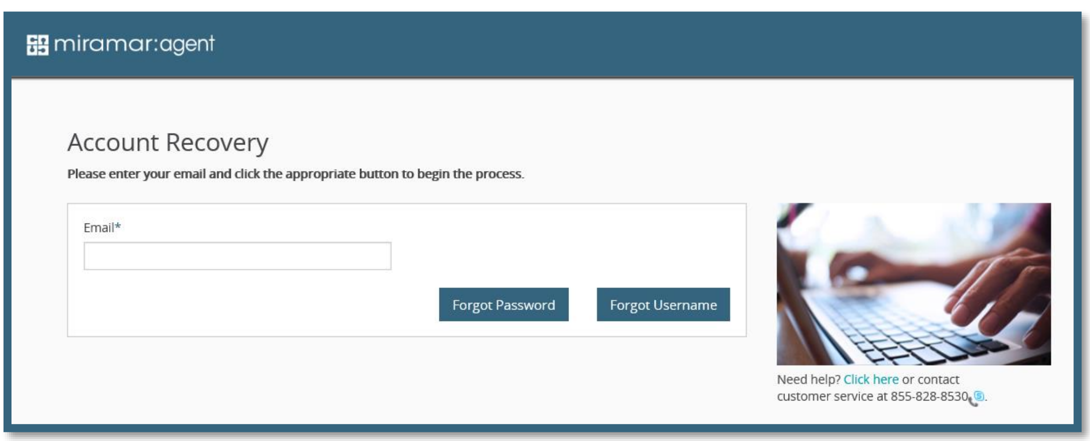


How do I retrieve my username or password?

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.



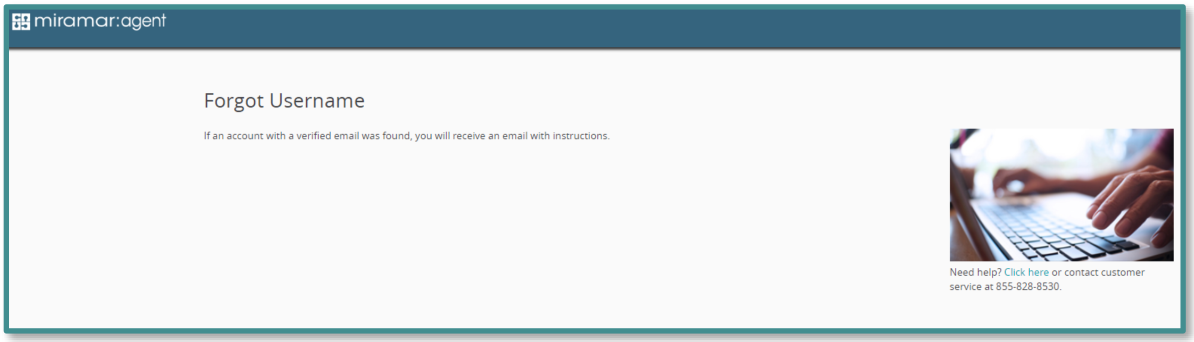


IMPORTANT: If you have already verified your email address, you will receive an email with instructions for retrieving your password or username. Otherwise, follow the instructions as prompted. If you have forgotten your password, you will need to know your username in order to retrieve it.

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.

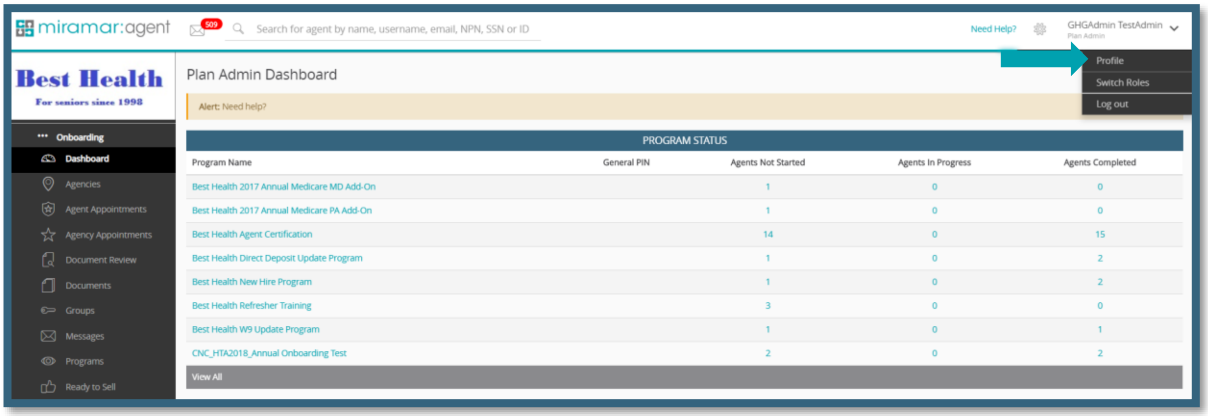


PROFILE MANAGEMENT

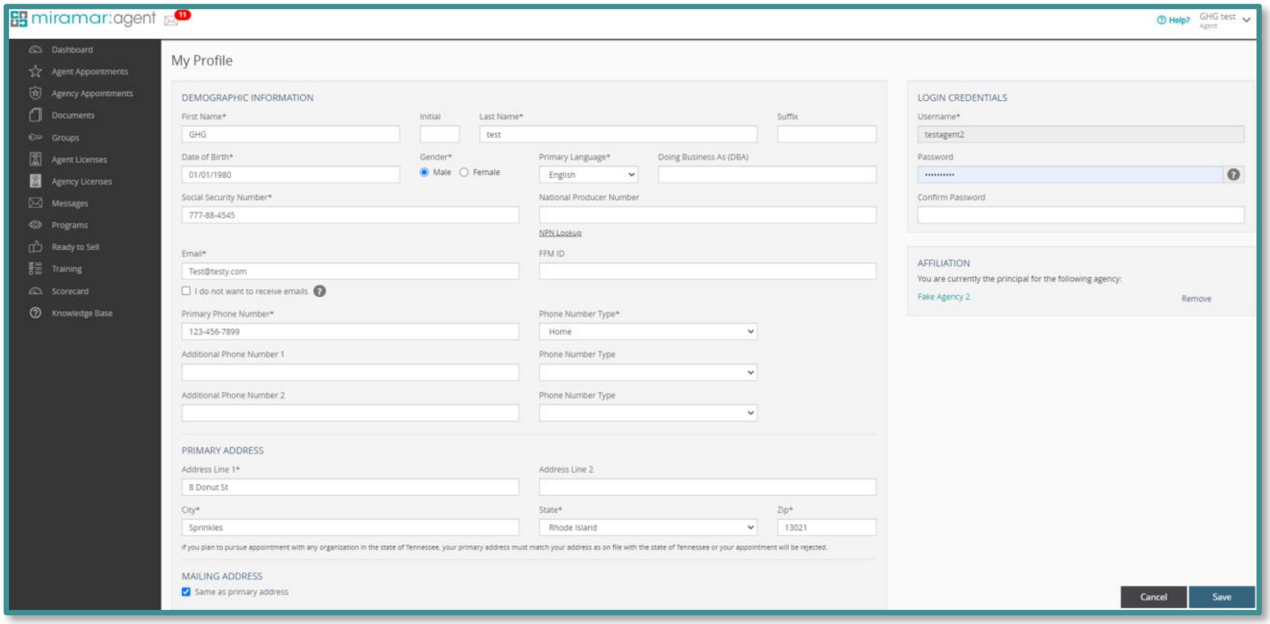
How do I update my profile information?

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**.

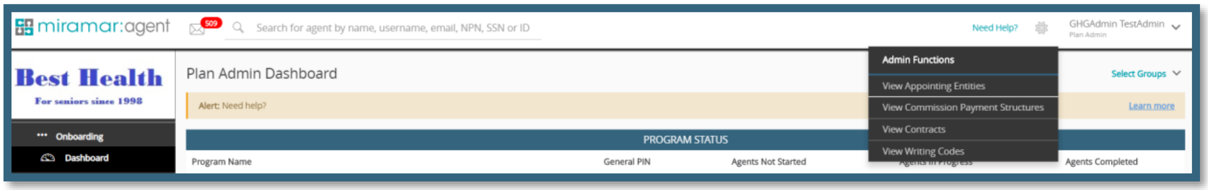


Once you've made the desired changes to your profile, be sure to click **Save** at the bottom of the screen before you leave the page.



ADMINISTRATOR FUNCTIONS

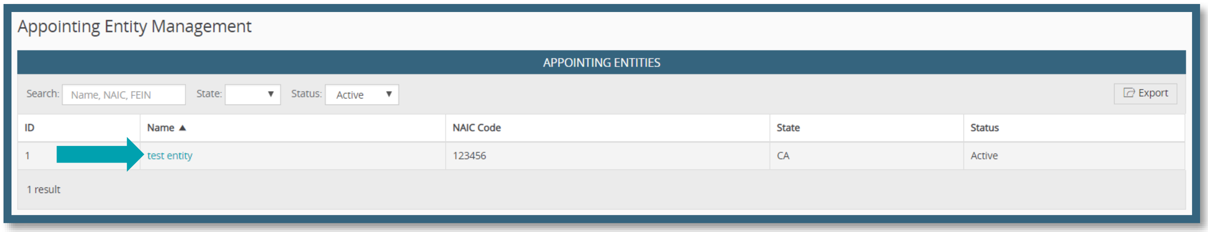
As a plan administrator, you're able to access many administrative functions using the gear icon located at the top right corner of the screen, directly to the left of your name. Click into any of the following to view more information on each of the administrative functions: Appointing Entities, Commission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



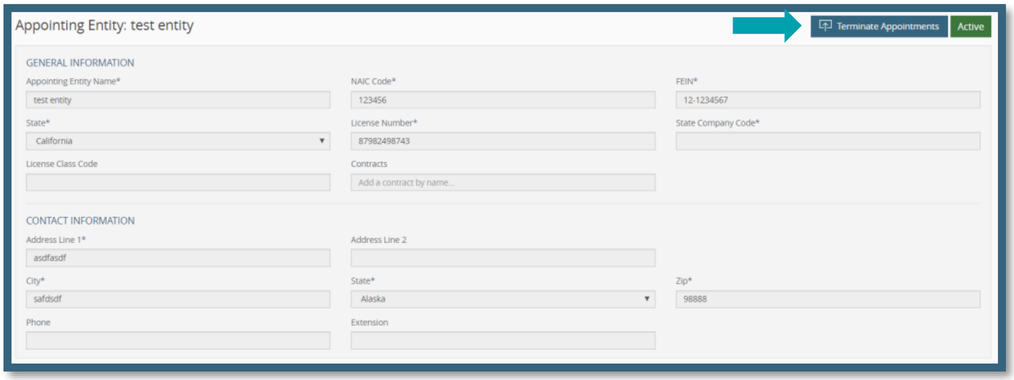
View Appointing Entities

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.

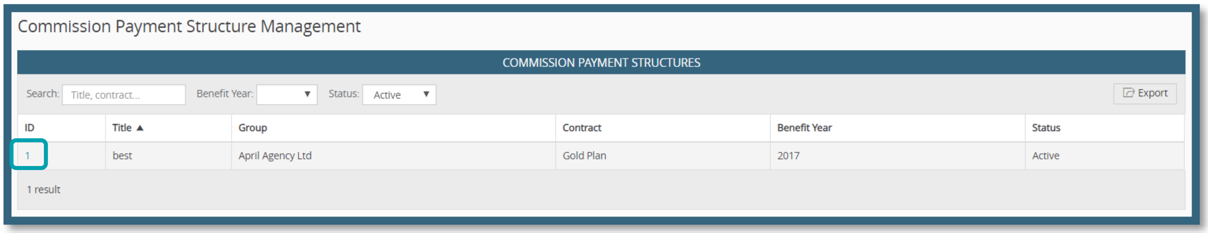


From this page, you will also have the option to do a batch termination of appointments by clicking into **Terminate Appointments.**

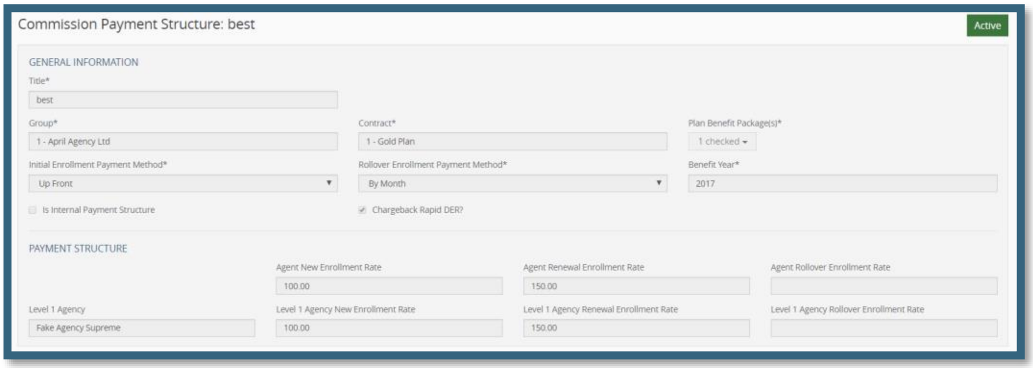
View Commission Payment Structures

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*.



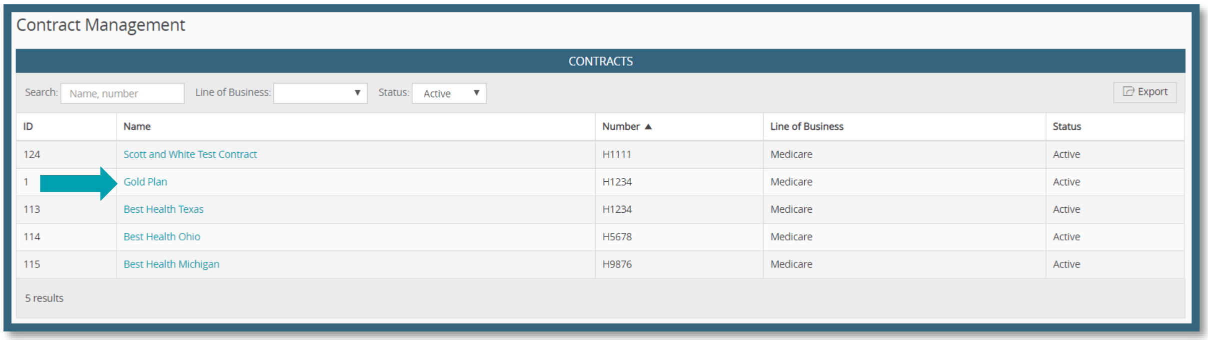
Once you have clicked into the *structure ID*, you will be able to view general information and payment structure information from this page.



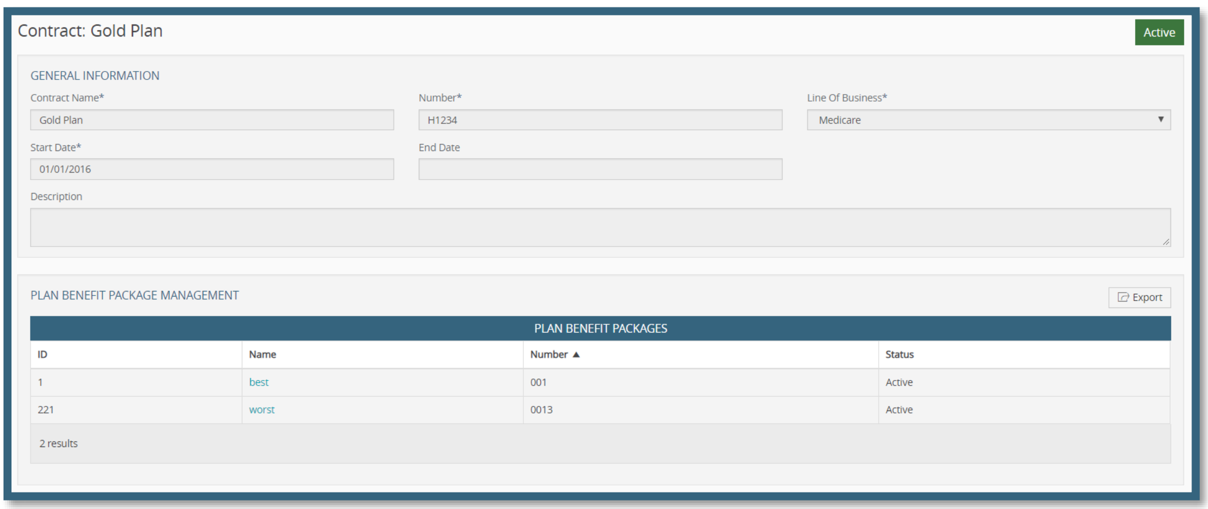
View Contracts

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*.



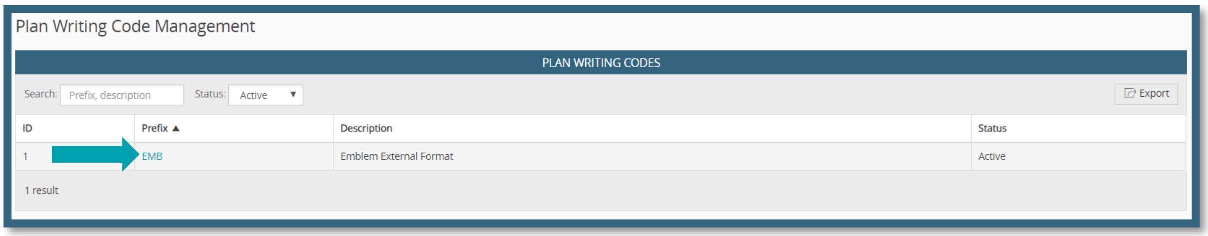
Once you have clicked into the *contract name*, you will be able to view general information and plan benefit packages.



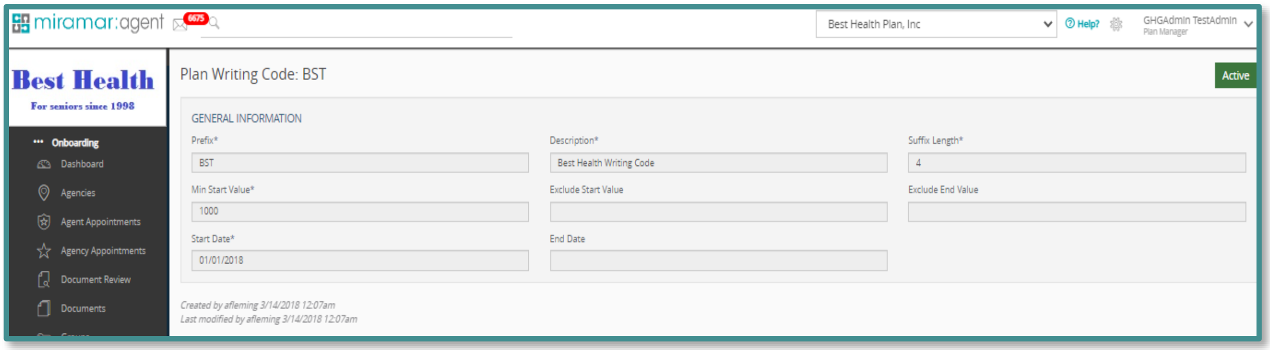
View Writing Codes

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*.



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



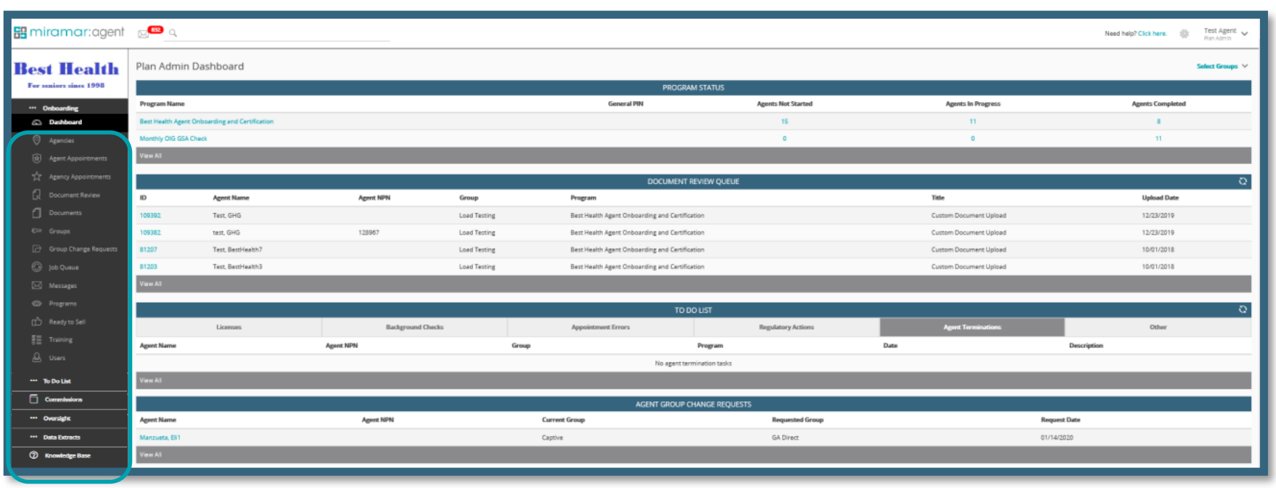
ONBOARDING

ONBOARDING DASHBOARD

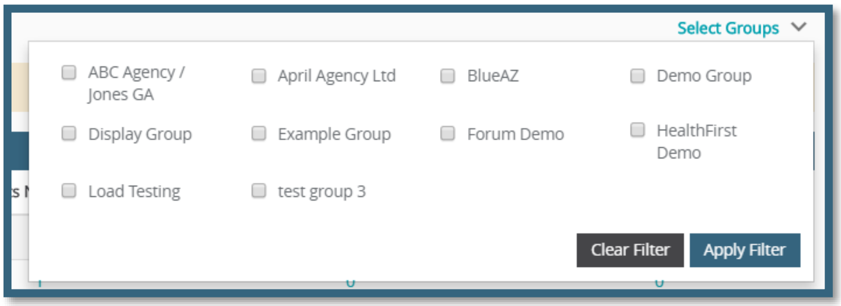
The Onboarding Module's Plan Administrator Dashboard is the main landing page when you log in to Miramar:Agent. This Dashboard provides a snapshot of your plan's activity in several categories, including *Program Status, Groups, Ready to Sell status, Training*, and New *Messages*. It also provides a 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.



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.



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.

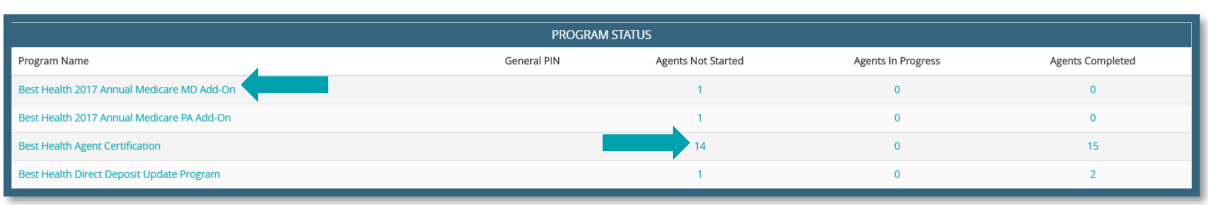
QUICK TIP: Clicking **View All** at the bottom of any widget will open the full index of information, also accessible by clicking into the category from the left side navigation panel as mentioned above.

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

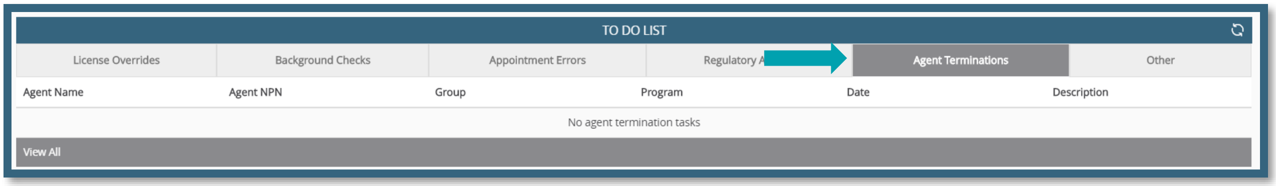
To Do List

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.



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	ency 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 is 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	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

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

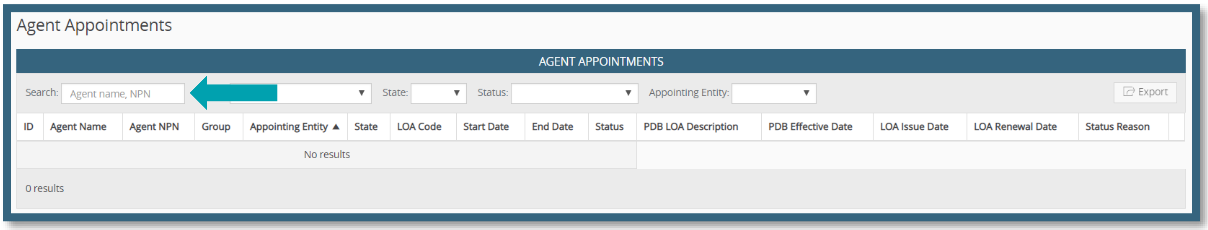
Messages

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

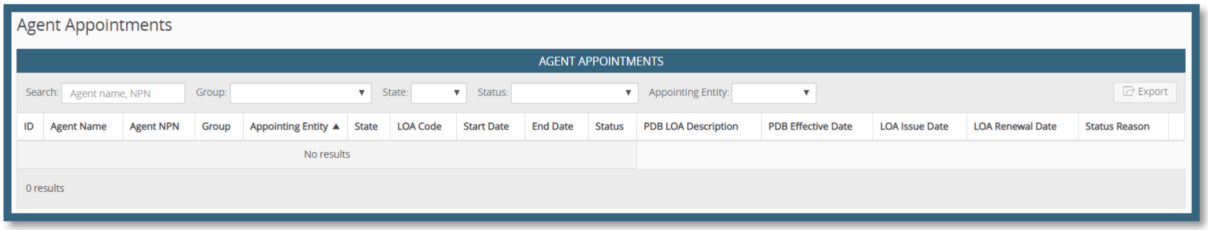
You have the ability to search within an index. Search criteria will differ depending on the index you are currently accessing. The search bar, found at the top left of each index, will tell you which search options are available.



Filtering within Dashboard Indexes

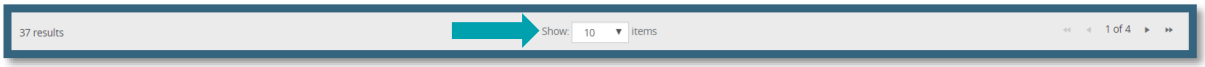
In addition to search, you can also filter the index to locate specific information. Similarly, each index has unique filtering options based on the information they contain.

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.



Expand Results

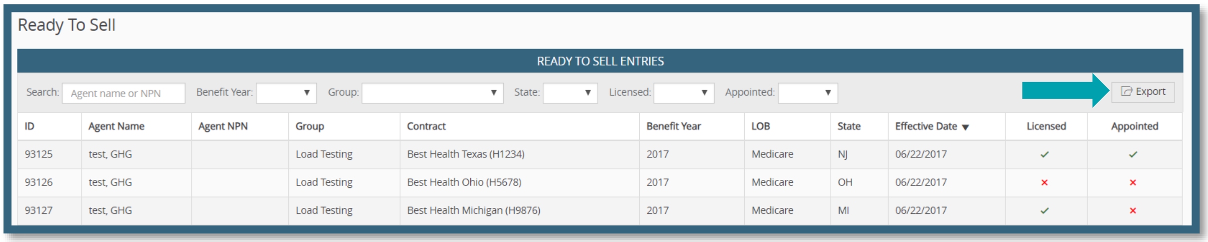
All indexes are defaulted to only show 10 items at a time. At the bottom of the index, select the drop-down to change to 10, 25, 50, or all records.



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.

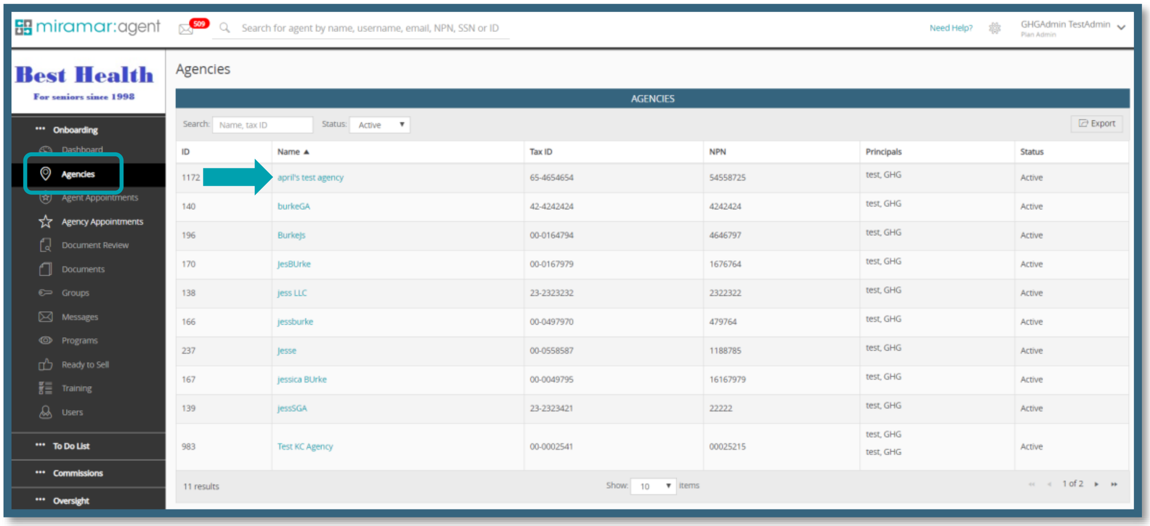
Be sure to apply any filters you want prior to running the export. Click **Export** at the top right corner of each index to run the report.



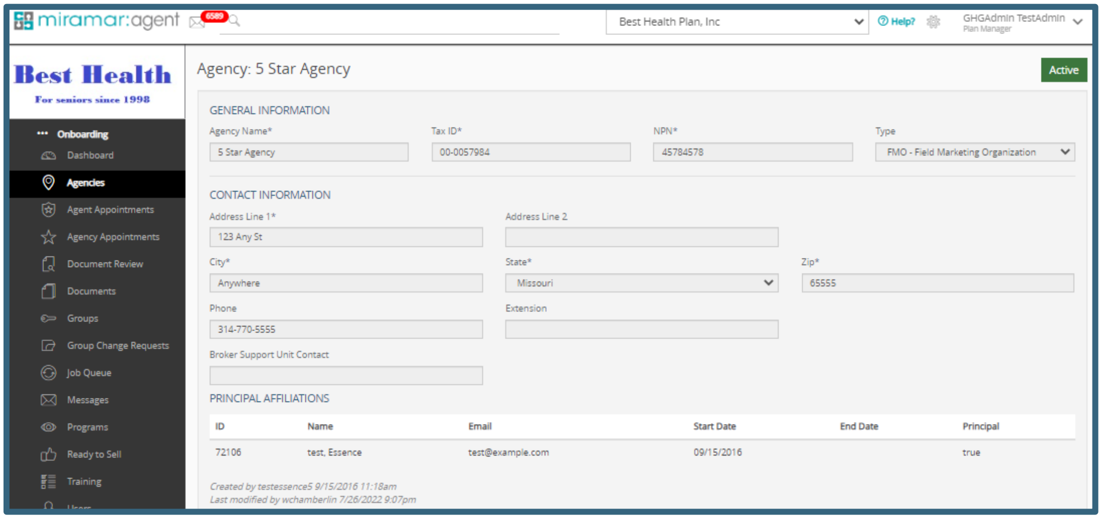
AGENCIES

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.

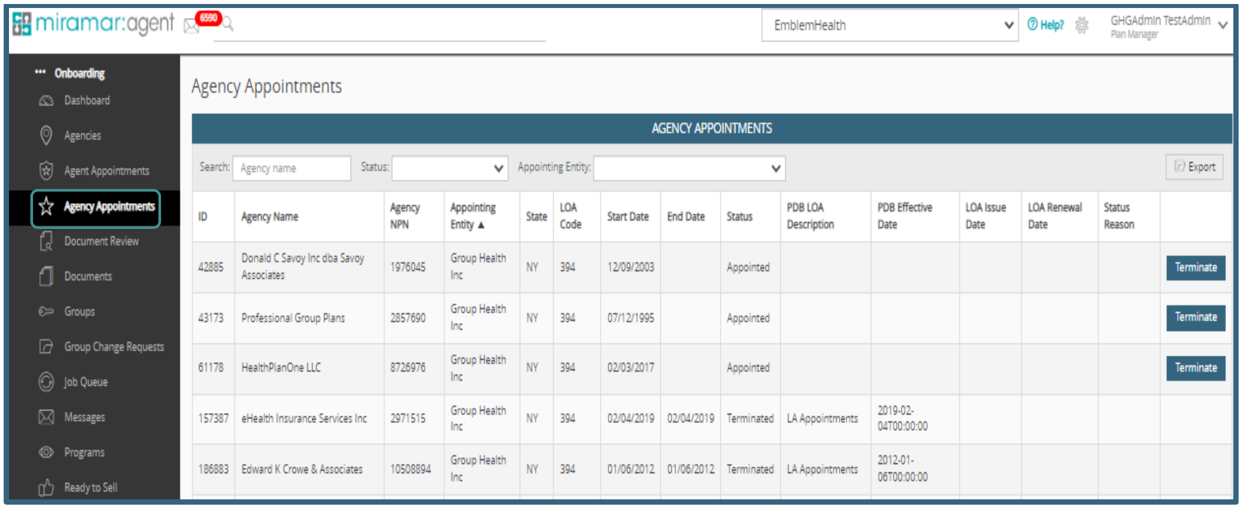


On the Agency page, you will find general information, contact information, and principal agent information for the specific agency. Click **Cancel** at the bottom of the agency information page to return to the Agencies Index.



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).



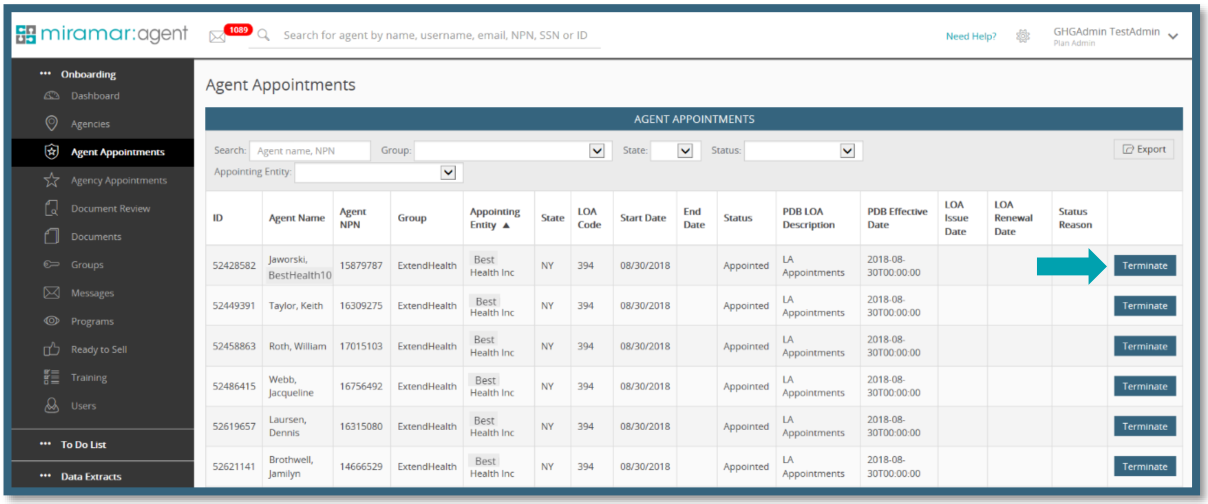
QUICK TIP: It is important to note the different appointment statuses as they provide more detail than the typical active/inactive filter. Knowing what each status indicates will make it easier to quickly research individual agent's progress or status in Miramar:Agent.

Status	Definition
Appointed	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.
Terminated	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.
Pending	The agent's appointment request passed technical validation with NIPR but has not yet been processed. This status is provided by NIPR. **NOTE:** A Pending appointment can still be rejected for reasons such as agent standing, name mismatch, address mismatch, etc.
Confirmed Pending	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.
Submitted to State	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). **NOTE:** A Submitted to State appointment can still be rejected for reasons such as agent standing, name mismatch, address mismatch, etc.
Requested Termination	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?

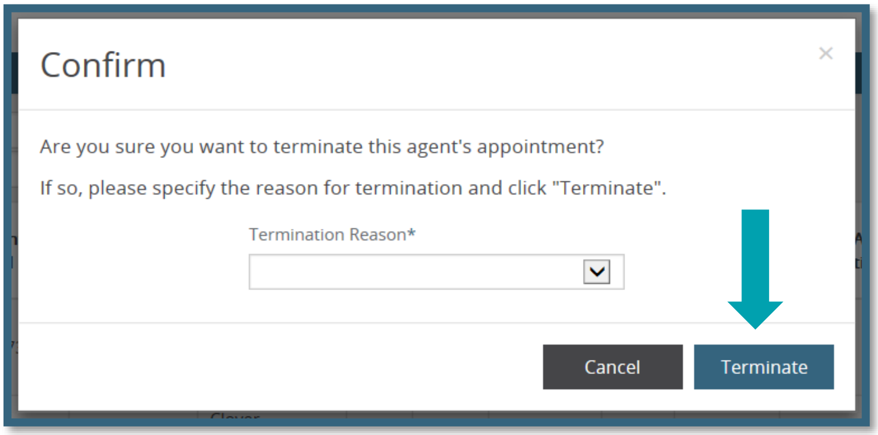
Terminating an agent's appointment can be done from the Agent Appointments index or from the individual agent's appointment page.

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

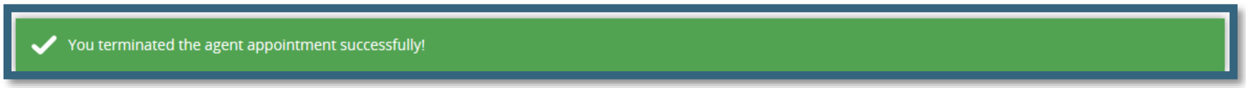


Once you have selected to terminate, a confirmation box will pop up. Select the *Termination Reason* from the drop-down menu. Termination reasons vary based on state. To confirm the termination, click **Terminate**. To cancel the termination and return to the Agent Appointments index, click **Cancel**.

NOTE: Not all states will require a termination reason.



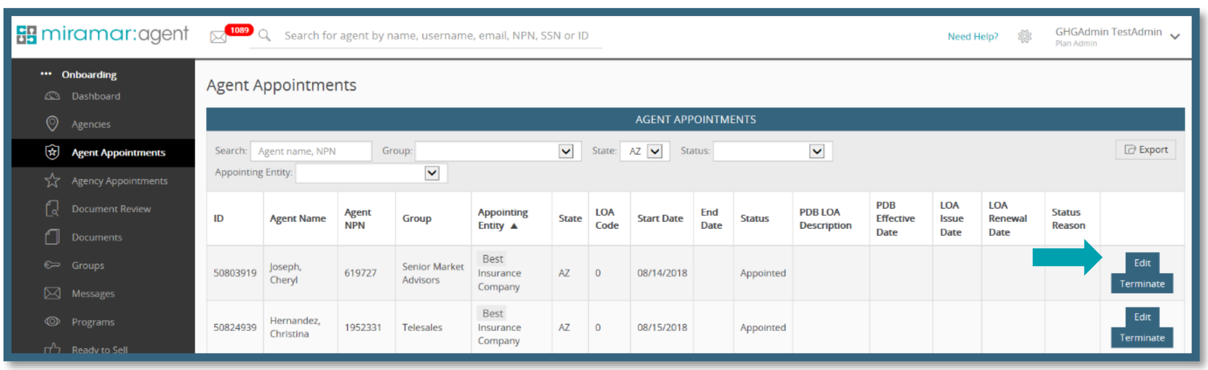
Once the termination has been successfully submitted, you will see the green banner below at the bottom of your browser screen.



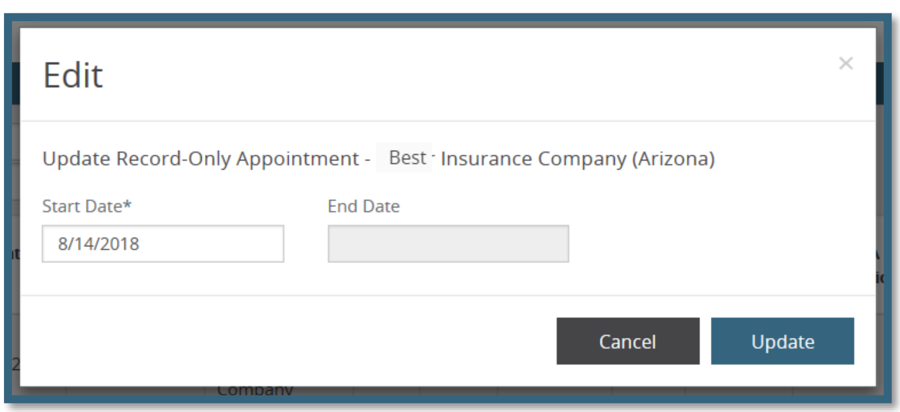
How do I edit an agent's record-only appointment date?

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.

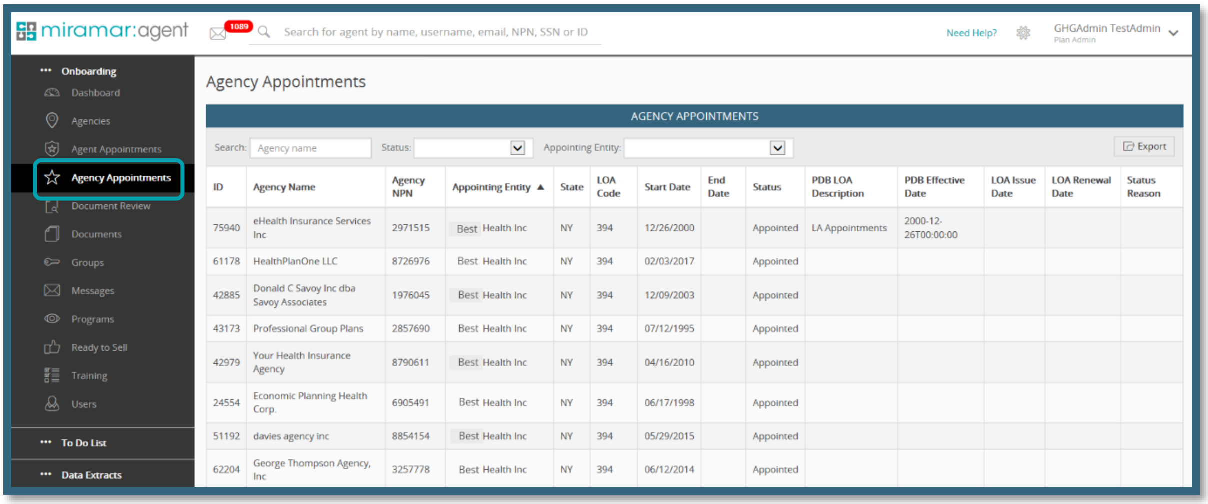


Enter the date you want the effective date to reflect and click **Update** to finalize the change. End dates can only be edited on terminated records.



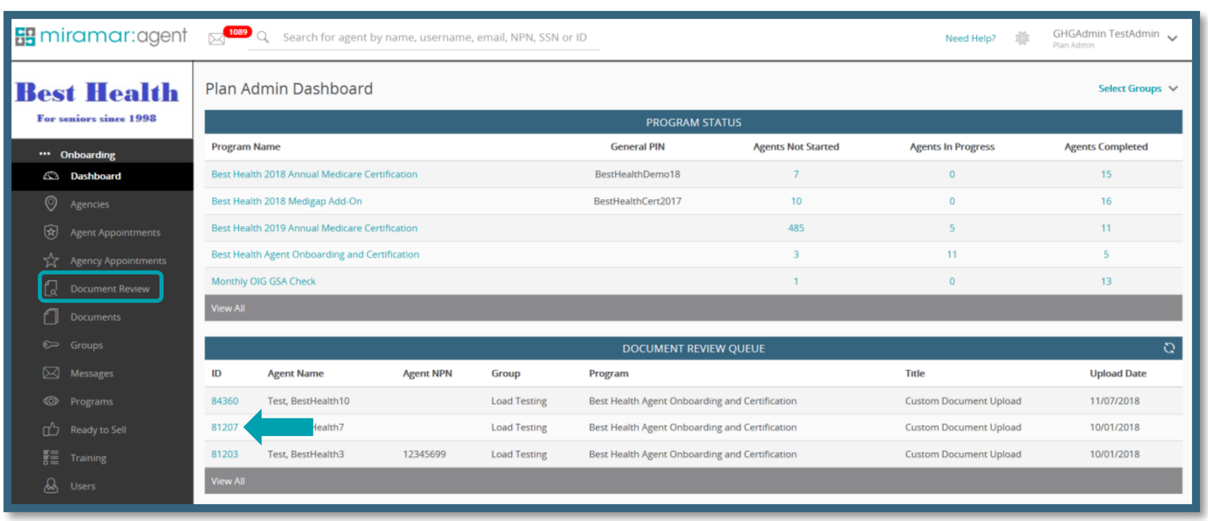
AGENCY APPOINTMENTS

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).



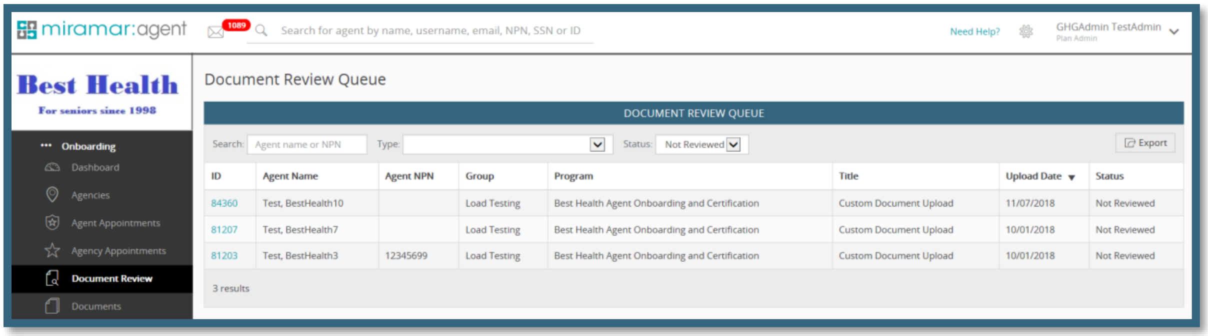
DOCUMENT REVIEW

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*.



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

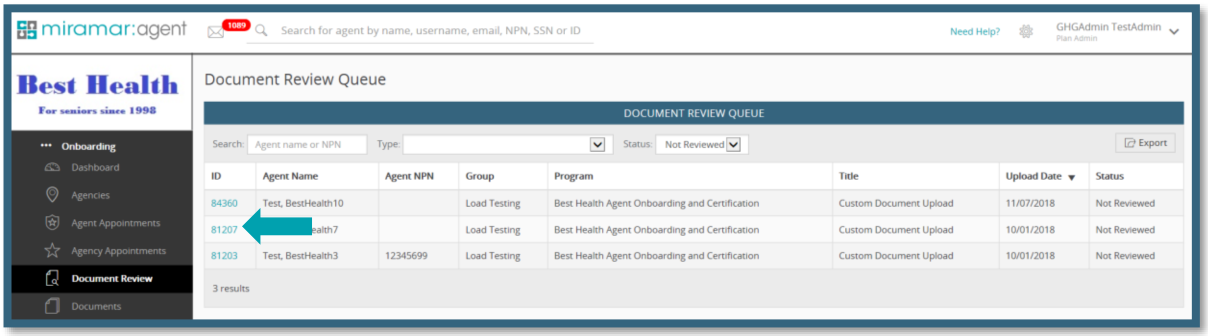
QUICK TIP: The Document Review Queue is automatically filtered to Not Reviewed. If you want to see documents that have already been reviewed, make sure you filter accordingly.



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.

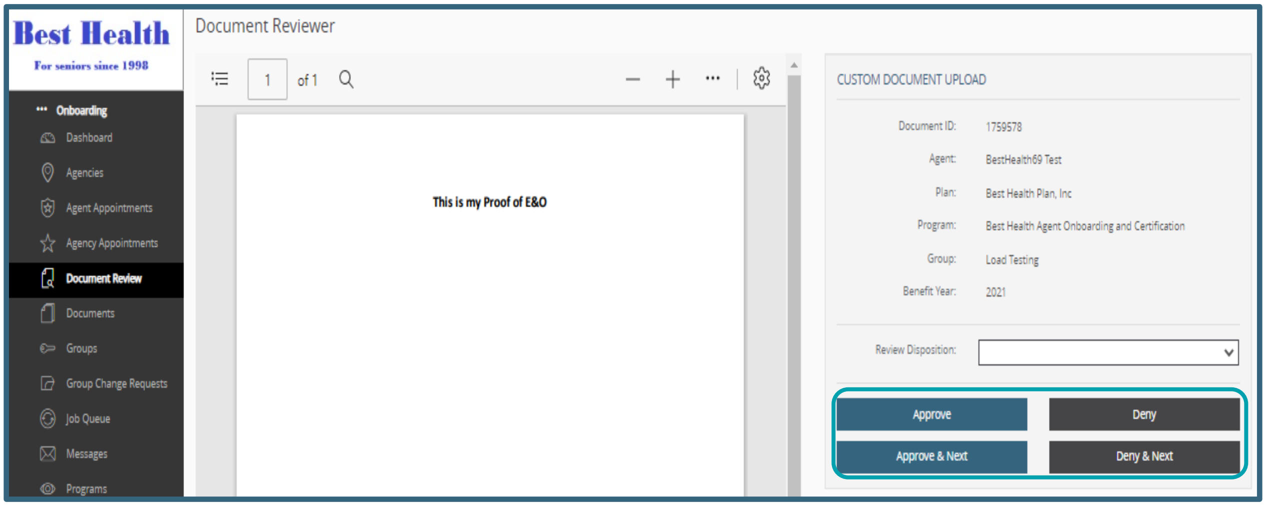


Once you have clicked into the ID number of the document you want to review, you will be presented with the screen below. After reviewing the document, you have the option to either approve or deny the document.

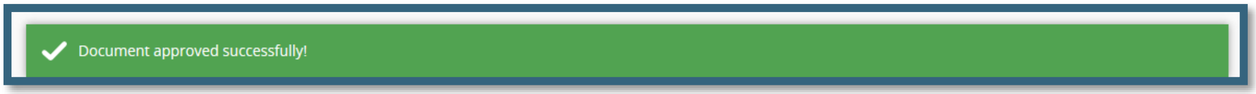
Approving the document will mark the agent as complete for his or her corresponding document upload step within his or her program. To approve the document and return to the Document Review Queue index, click **Approve**. To approve the document and go to the next document review page, click **Approve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

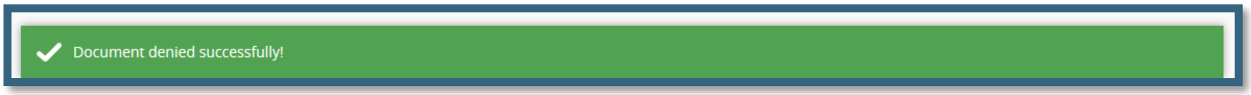
Denying the document will return the agent to the document upload step to give him or her another opportunity to upload the document. To deny the document and return to the Document Review Queue index, click **Deny**. To deny the document and go to the next document review page, click **Deny & Next**. 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**.



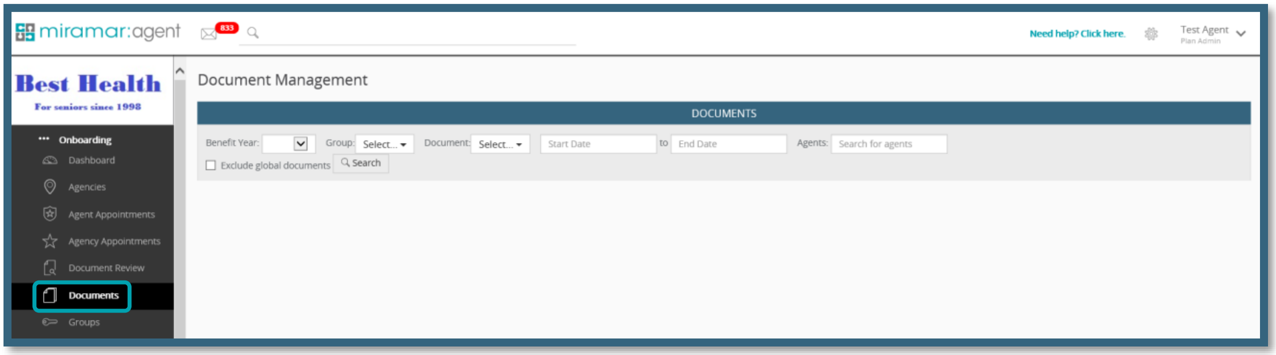
After selecting one of the approved or denied options, and the document has successfully registered as such, you will see a confirmation banner at the bottom of your browser's screen.





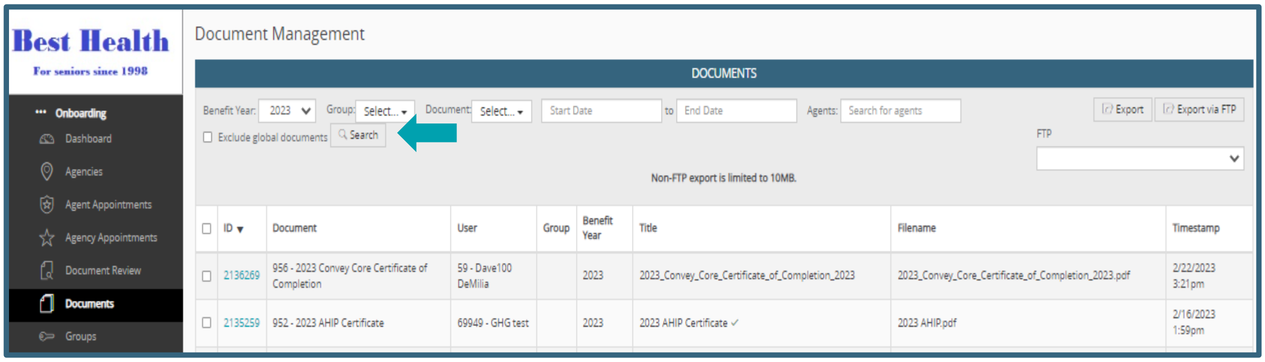
DOCUMENTS

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.

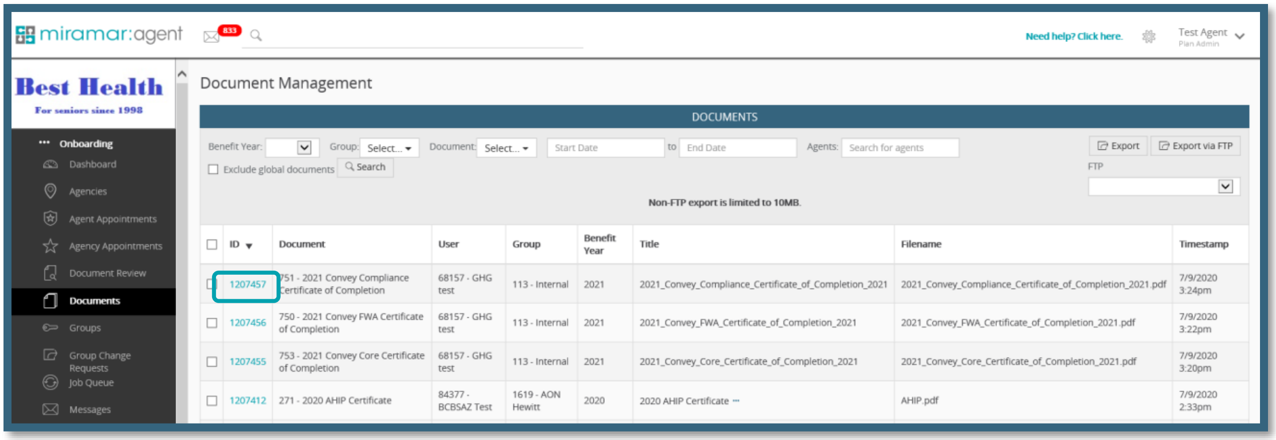


Documents you will find here include training completion certificates, W-9 forms, or any other forms that are specific to your plan's onboarding program such as agent agreements, code of conducts, or direct deposit forms.

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*.



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.

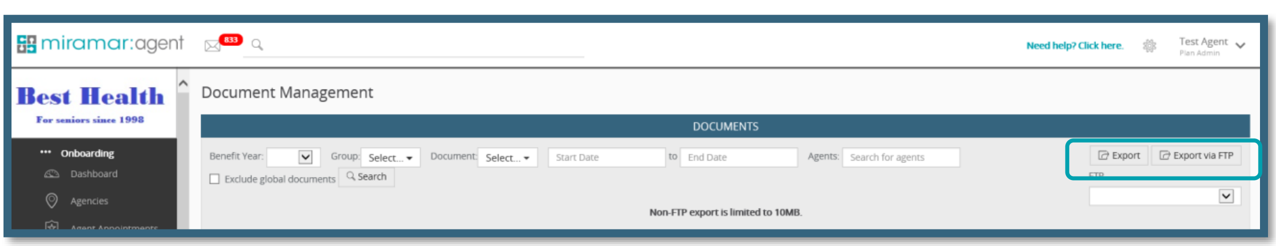
How do I export documents?

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.

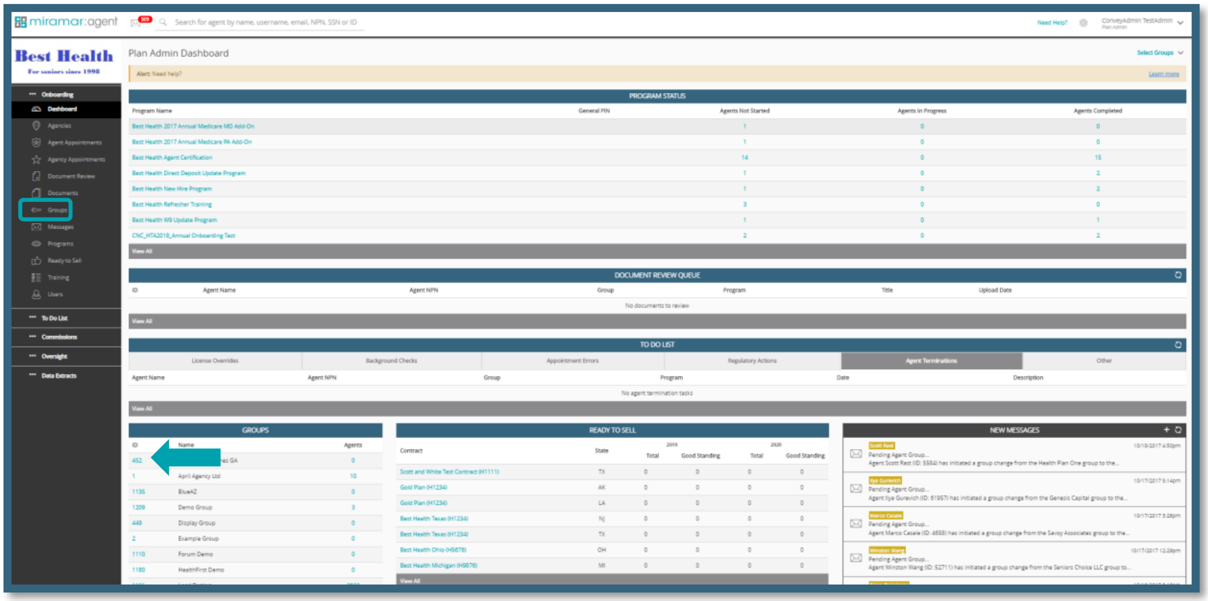


GROUPS

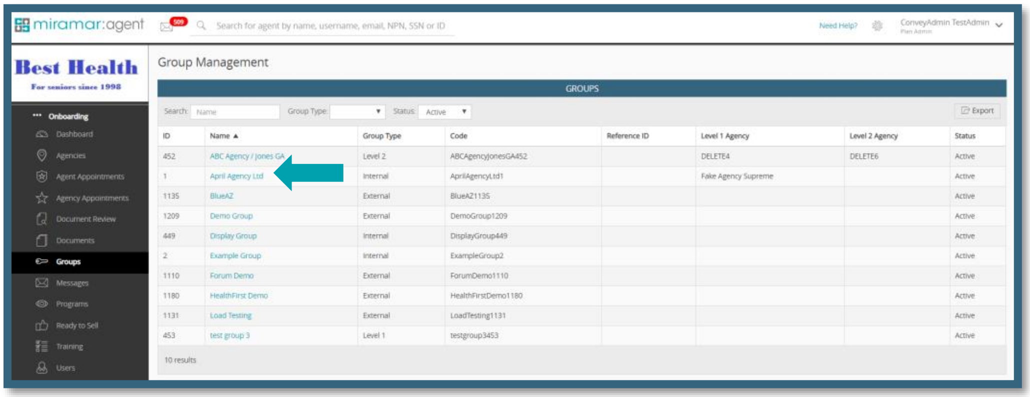
Groups are the way you categorize your agents, and every agent associated with your plan must be assigned a group. Groups are important because they can help determine different pathways in your plan's onboarding programs.

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.



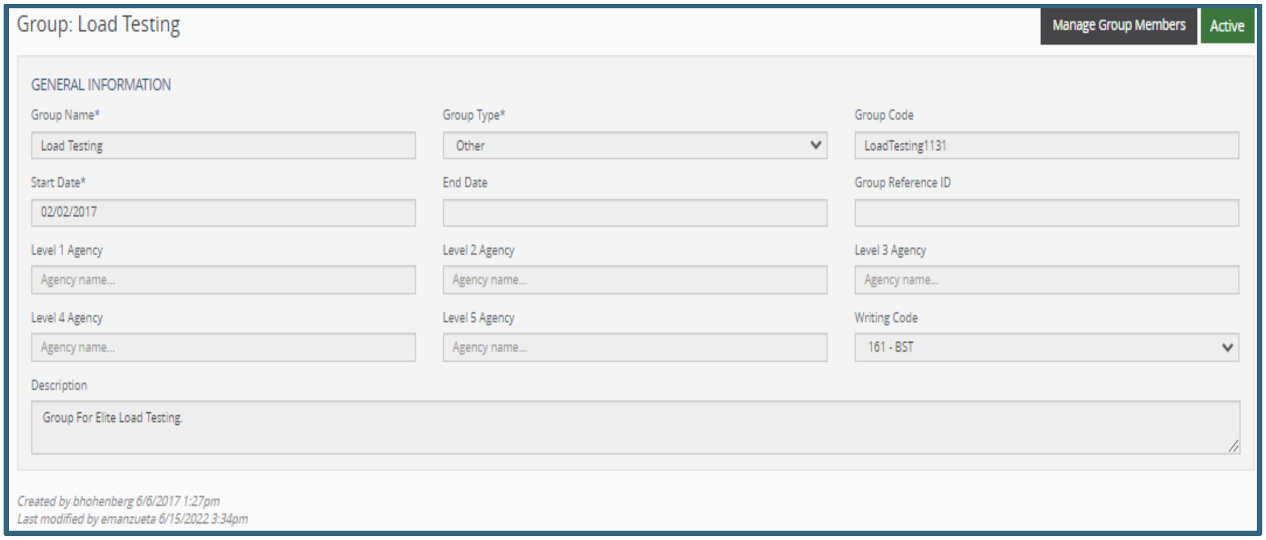
From the Group Management index, you're able to open individual records to view specific group setup information. To open a group, click on the *group name*.



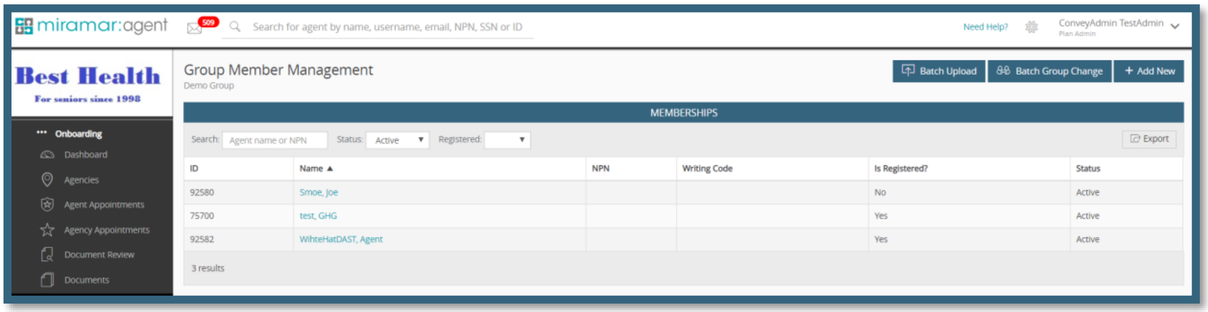
QUICK TIP: *Group Code* is used for initiating group changes for an individual. If you are planning on initiating an individual group change, make sure to copy the code from the Group Management index or export it for easy reference.

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**.



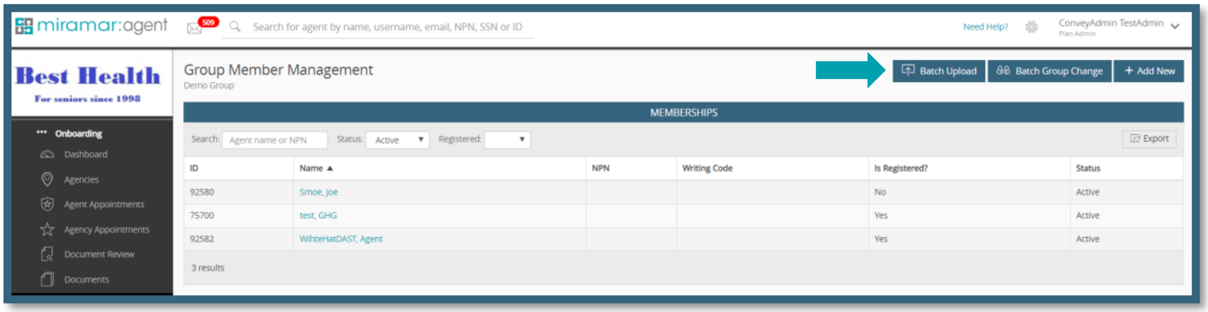
From the Group Member Management index for a group, you are able to view basic agent information and initiate an individual group change, initiate batch upload, batch group change, or add a new, single agent.



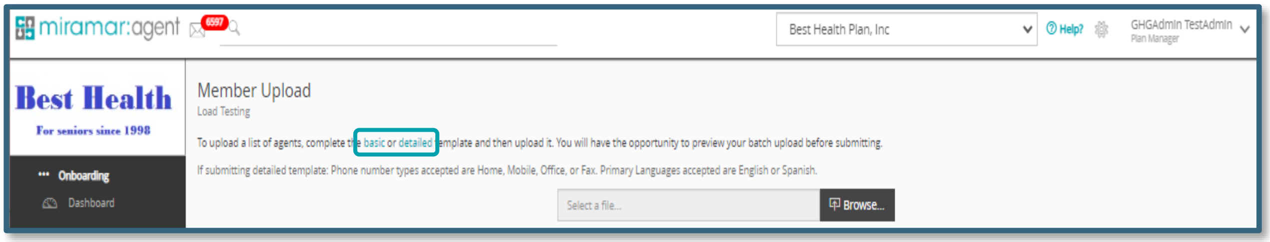
How do I load an agent to a group?

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				

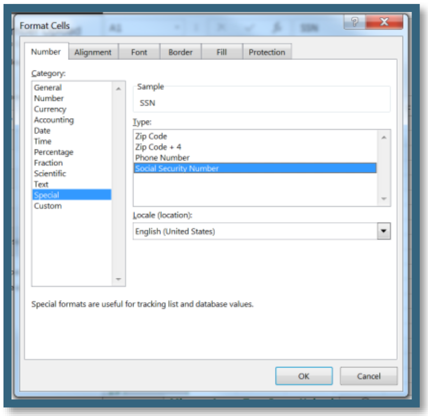
The ***Detailed Template*** will require you to provide the SSN, First Name, and Last Name of the individuals you wish to add to the group. NPN, Address Line 1, Address Line 2, City, State, Zip, Phone Number, and Email may also be included but are optional.

	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											

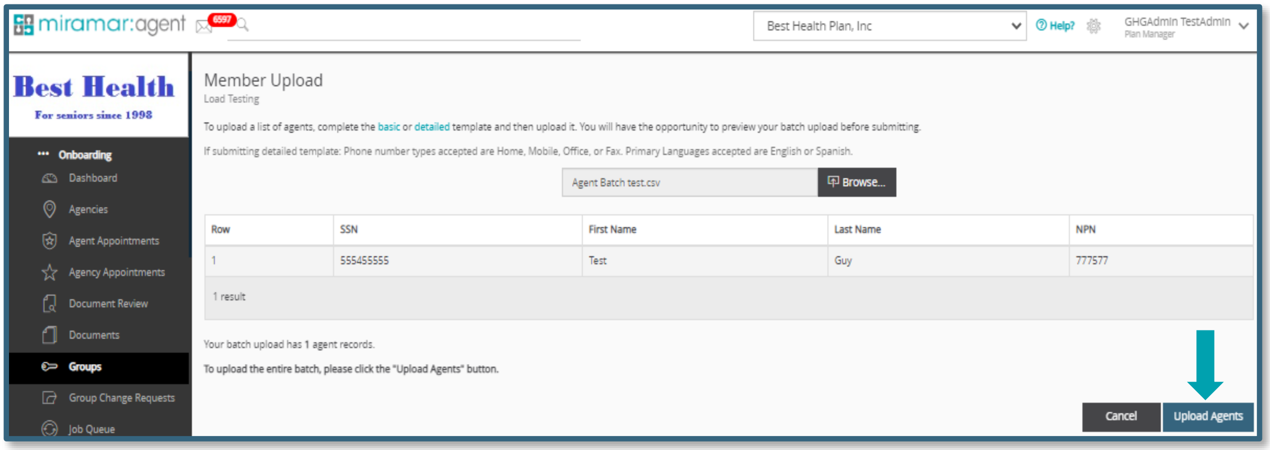
Once you have completed the required information on either the basic or detailed template, save the file to your documents, then upload it to Miramar:Agent by clicking **Browse**, selecting the file you just saved, and clicking **Open**.

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.

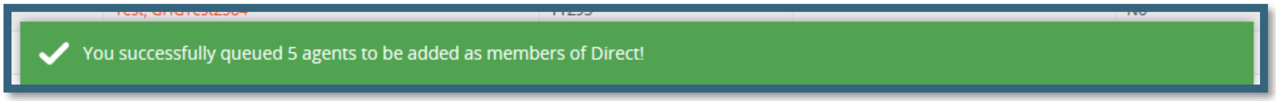
NOTE: SSNs must be saved in SSN format. To format, highlight the column, right click, click **Format Cells**, then select **Special** under category. Click **OK** to save.



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.



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

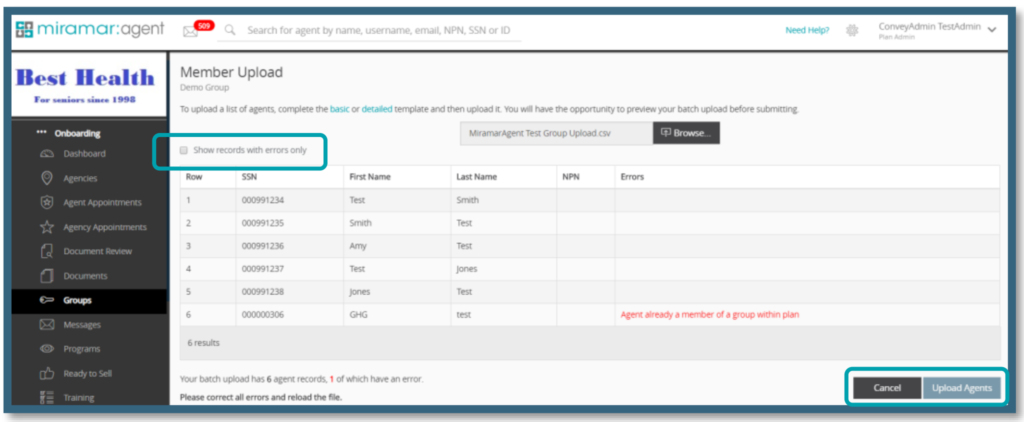


Upload Errors

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

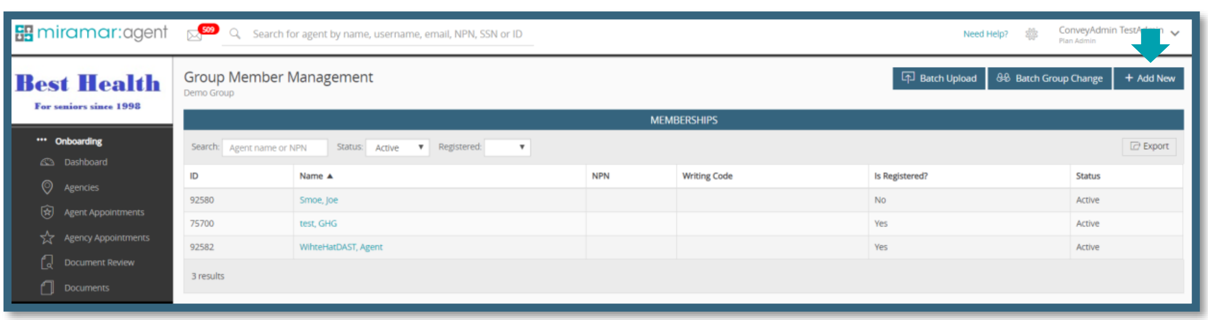
You will be able to review any errors from this same page. To easily view only the agents who were effected by errors, check the box next to **Show records with errors only**.

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

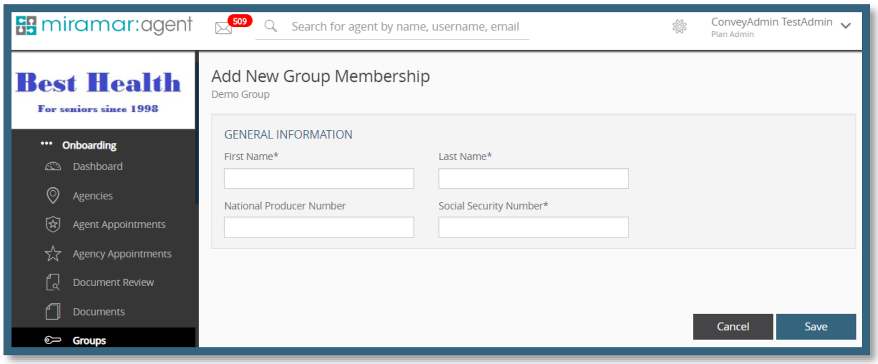


Single Agent Add

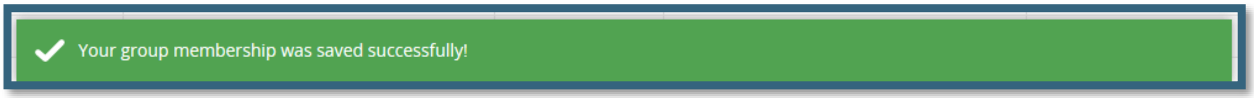
To add a single agent to a group, click **Add New** at the top of the Group Member Management index.



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.



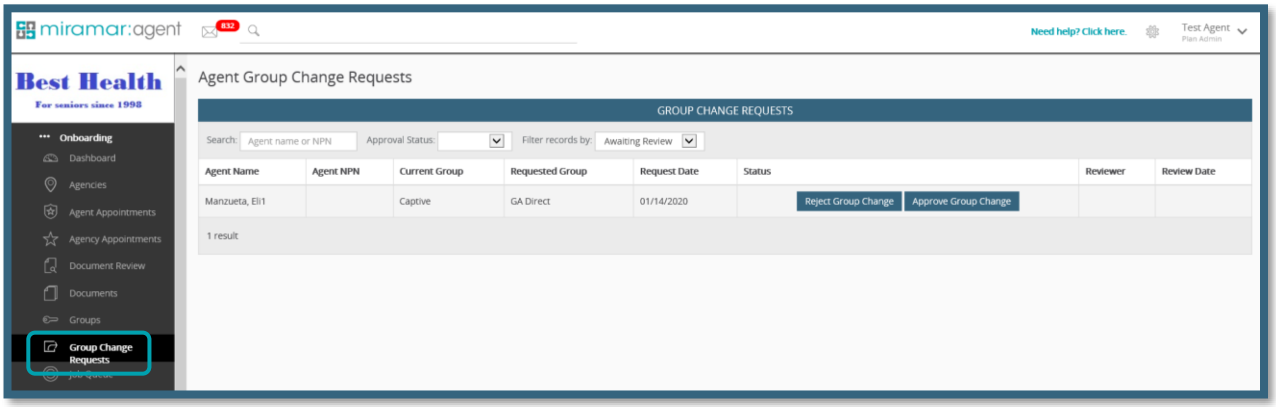
Upon successful enrollment of the agent to the group, you will see a confirmation banner at the bottom of your browser screen.



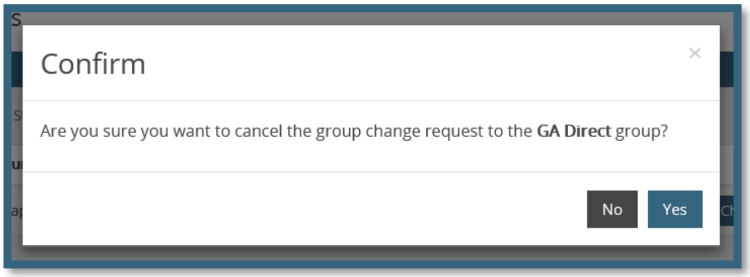
How do I change an agent's group?

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 individuals name from the Group Change Request widget or click **View All.**



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

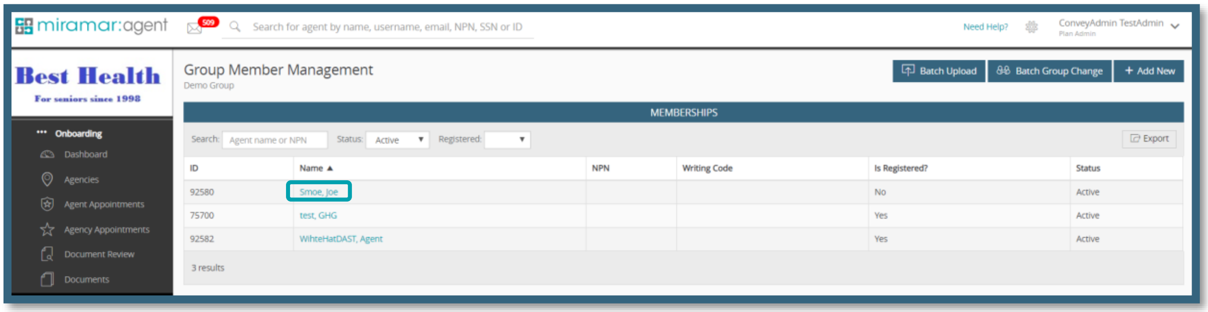


If you want to allow the agent to change groups, click **Approve Group Change**. You will be prompted to confirm the approval by clicking **Finalize**. If you have a different Writing Code structure for the new group, then click the checkbox next to *Issue New Writing Code*? If the writing code should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

Individual Group Change

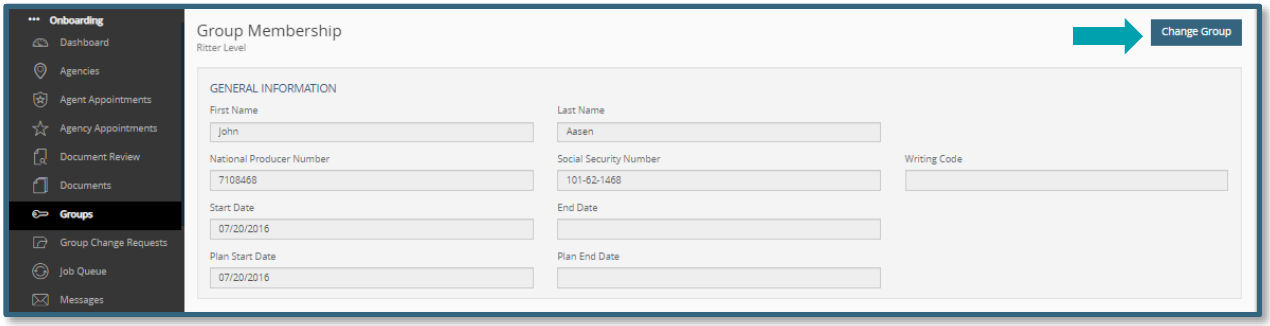
To view basic agent information and/or initiate an individual group change, click into the *agent's name* from the Group Member Management index.

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.

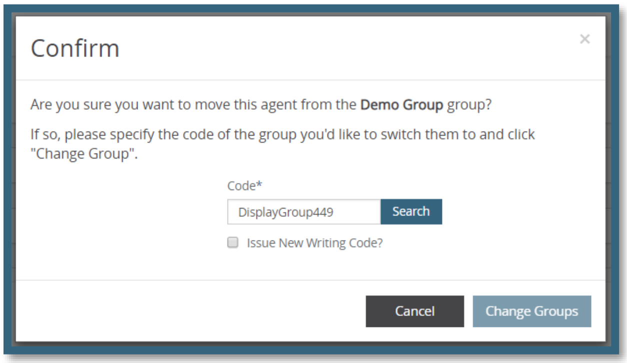


Once you have clicked *Change Group*, a confirmation box will pop up on the screen. You will need to enter the *Group Code* for the group to which you are wanting to change. This is found on the Group Management index.

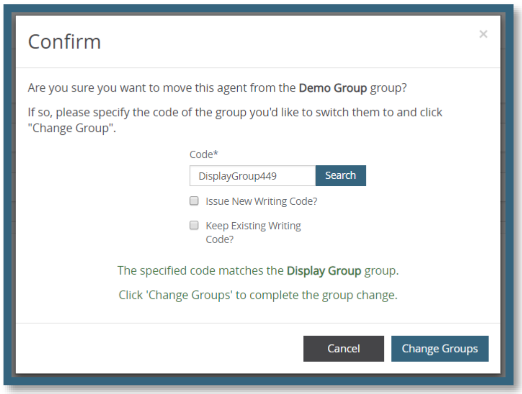
You have the option to issue a new writing code by checking the box next to **Issue new writing code?** If writing codes are group specific and you want to issue a new writing code, check this box. If all groups use the same prefix, then you may not want to issue a new writing code.

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

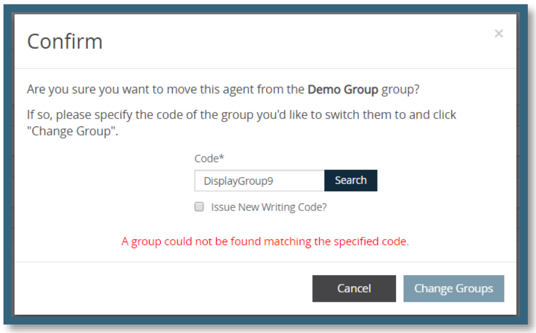
Click **Cancel** at any time to return to the agent information page.



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

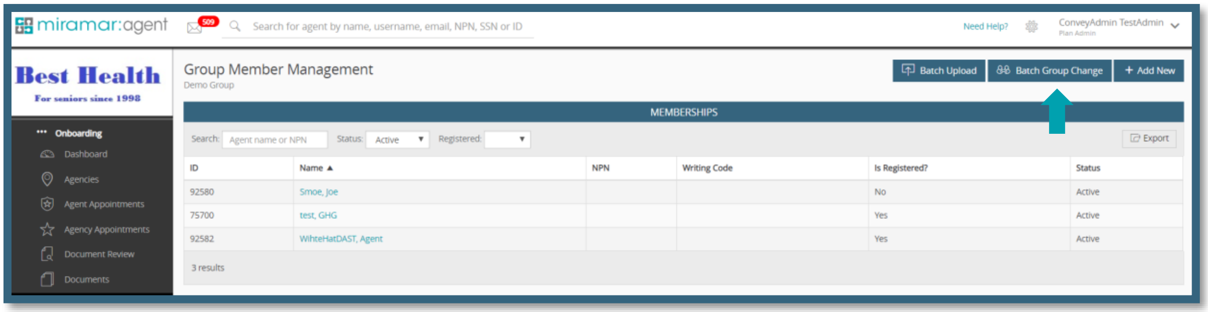


If the group code you entered is invalid, you will get the error message in red below. Refer to the Group Management index to confirm the group code.

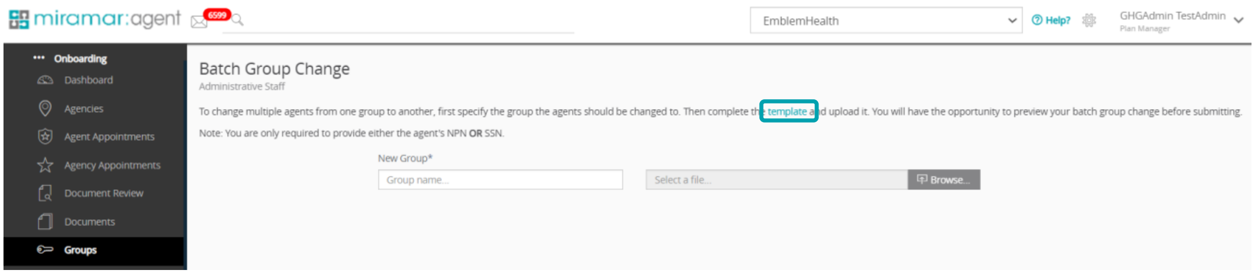


Batch Group Change

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



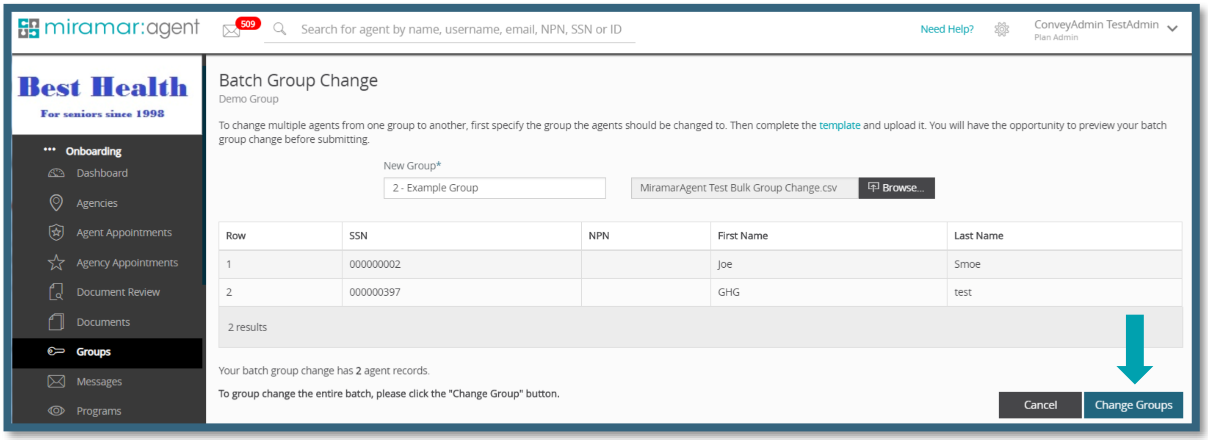
After clicking into *Batch Group Change*, you will be prompted to upload a list of agents using the provided template, which can be downloaded by clicking into the **template** link. You will also need to select the group to which you wish to change. Start typing the group's name under *New Group*, and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

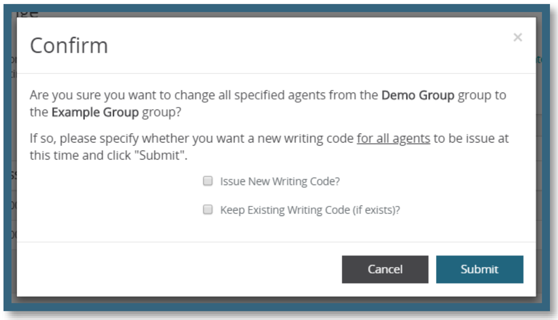
Once you have selected the file, the agent's information will populate on the same screen. If the information you have uploaded looks correct and there are no errors, select **Change Groups** at the bottom right.



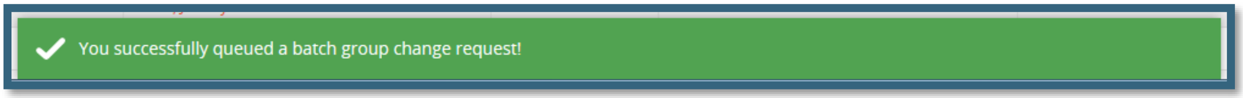
Once you have clicked *Change Group*, a confirmation box will pop up on the screen. You will have the option to issue a new writing code to all agents by checking the box next to **Issue New Writing Code?**

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**.



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

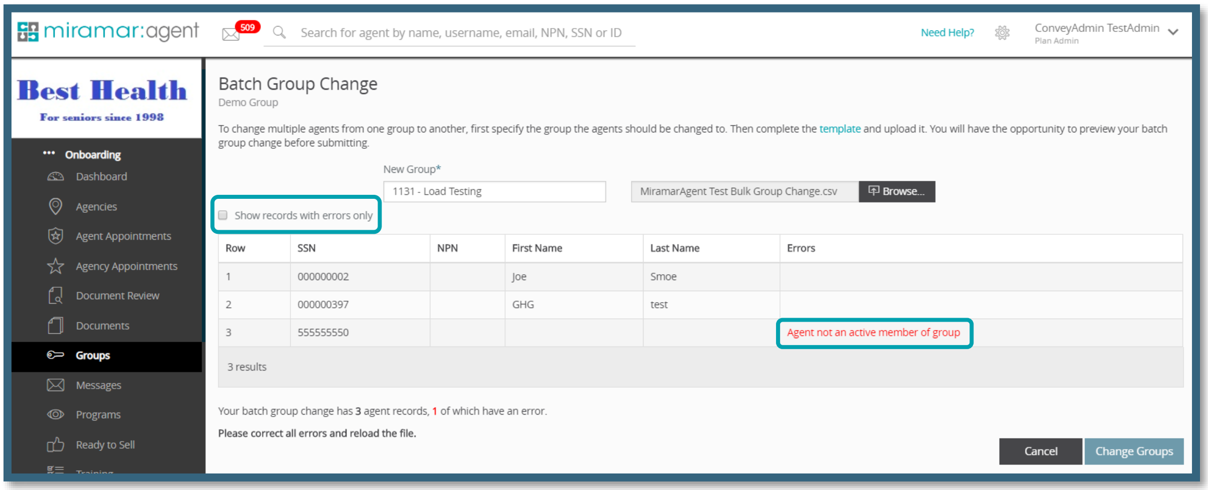


Upload Errors

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.

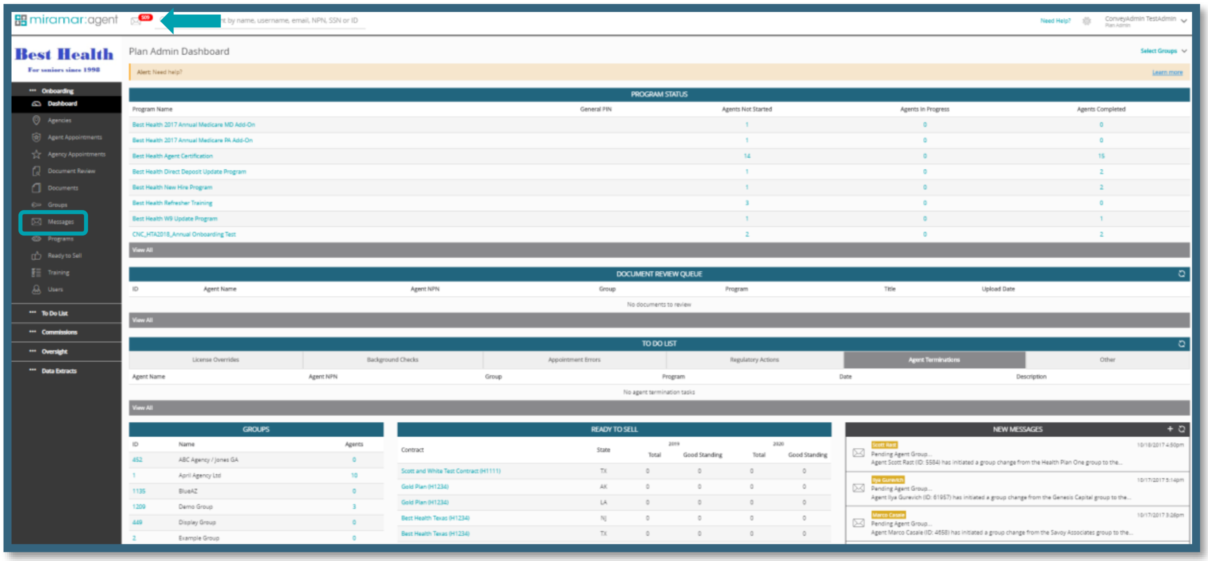


MESSAGES

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.

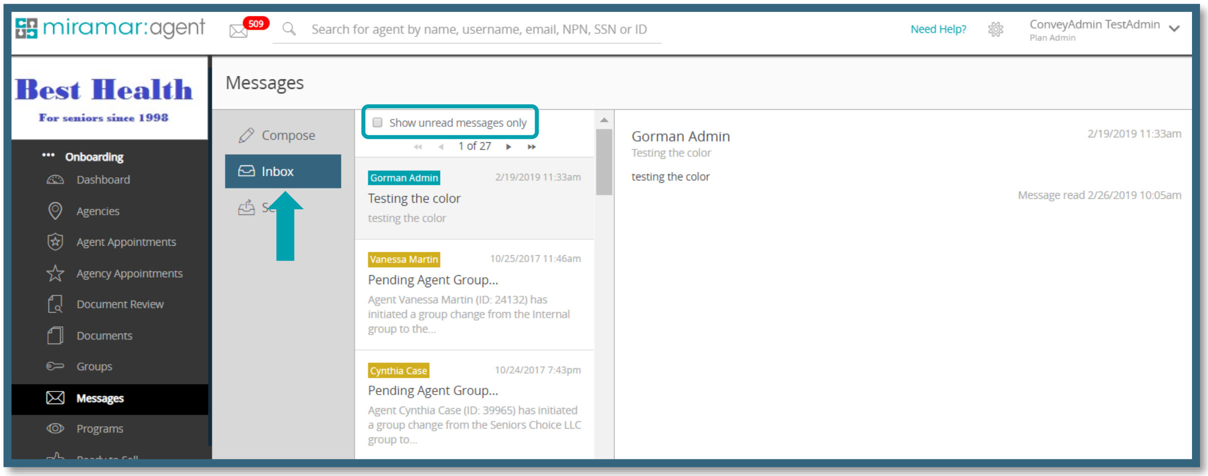
If you have new or unread messages in your inbox, a red indicator will display next to the *envelope icon* at the top of your dashboard next to the agent search bar.

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.



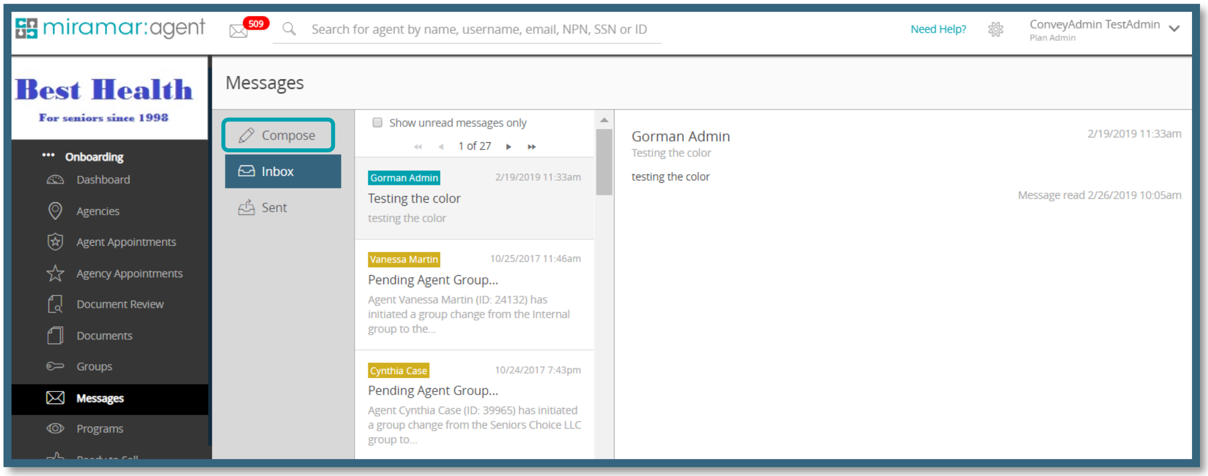
Once you have opened the messaging center, you will view your Inbox. Unread messages will be marked with a red flag in the top left corner of the message summary. To view only unread messages, check the box next to **Show unread messages only**.

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.



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.

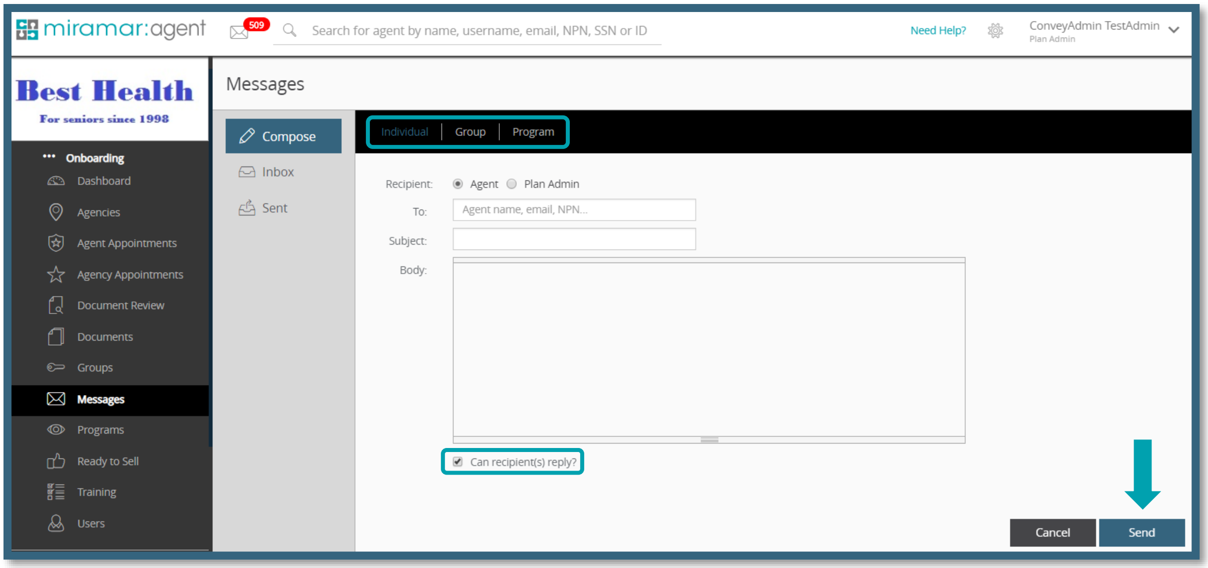
If you select *Individual,* you will need to choose whether the recipient is an agent or plan administrator. From there, you may search by name, email address, or NPN.

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.

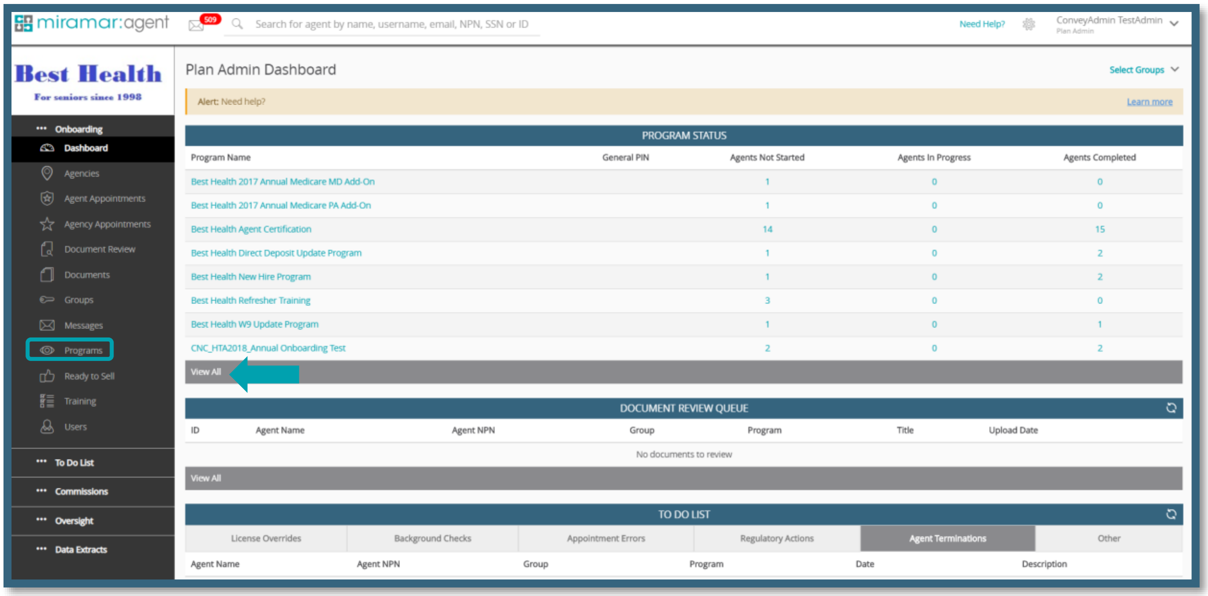
QUICK TIP: The system default allows recipients to reply to your messages. To send a message and prevent replies, deselect **Can recipient(s) reply?** at the bottom left of the message.

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



PROGRAMS

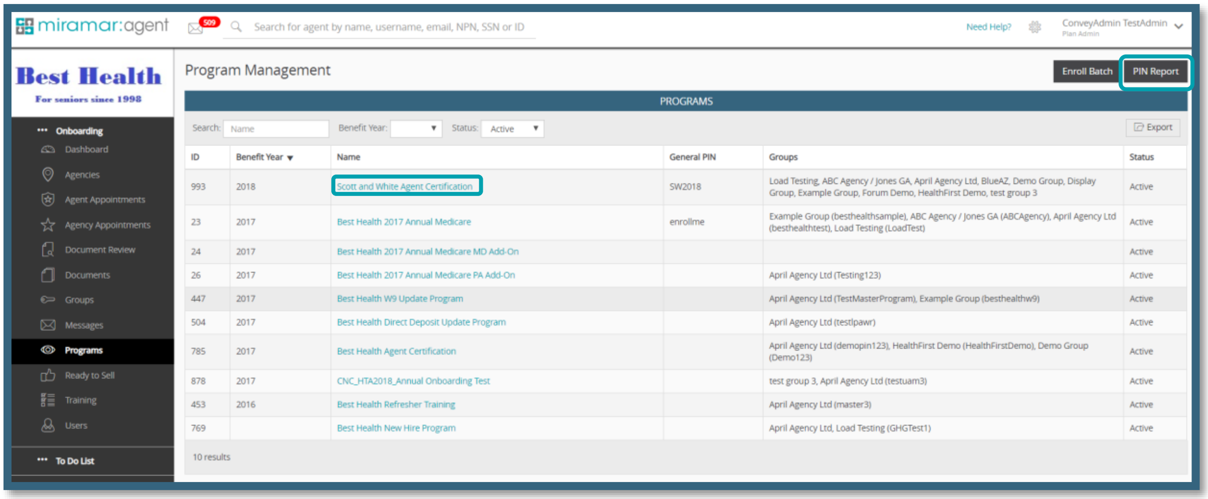
To manage your Programs, click the **Programs** icon in the Onboarding Menu to the left of the screen; or from your dashboard, click **View All** under the *Program Status* widget.



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.

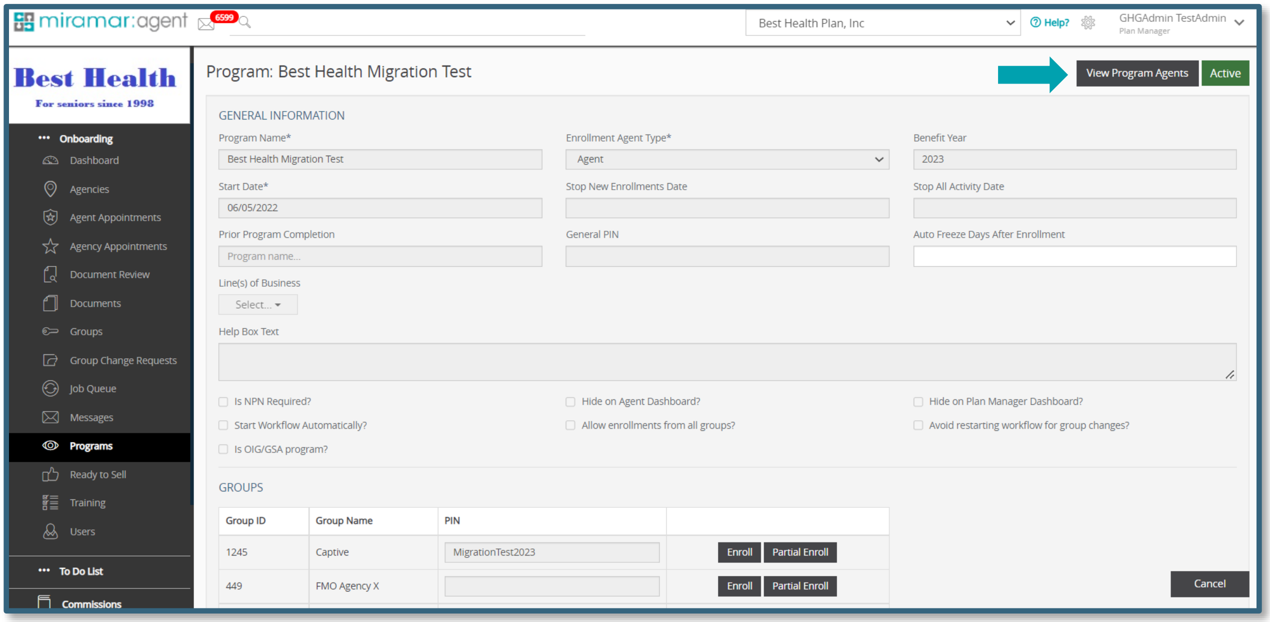
To view specific program information, including group-specific PIN codes and notification settings, or to view program agents or enroll agents, click into the *program name*.



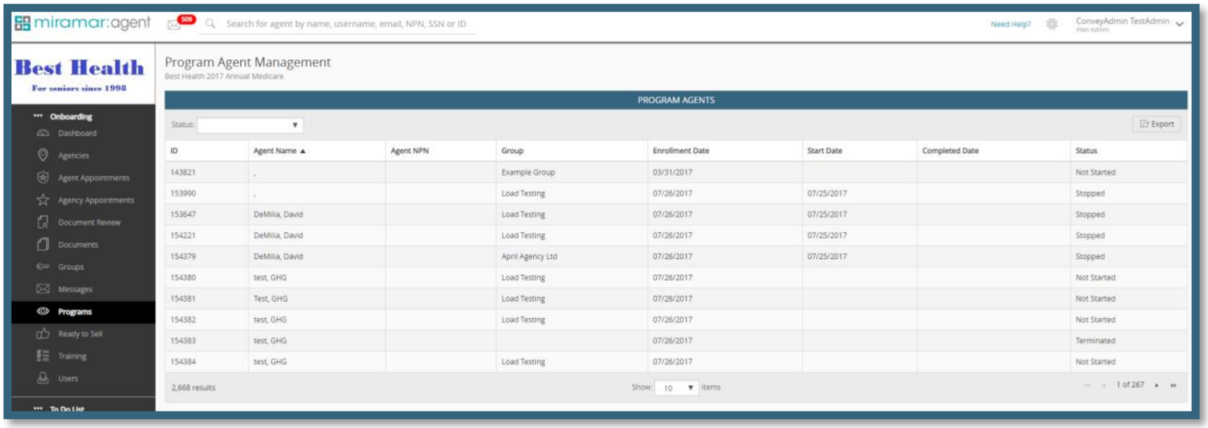
Here you will be able to view general program setup information, including groups and their specific PIN codes, and notification settings. Programs are set up during your annual configuration with your PM. To add a new program or edit an existing program, reach out to your assigned PM.

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.



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.



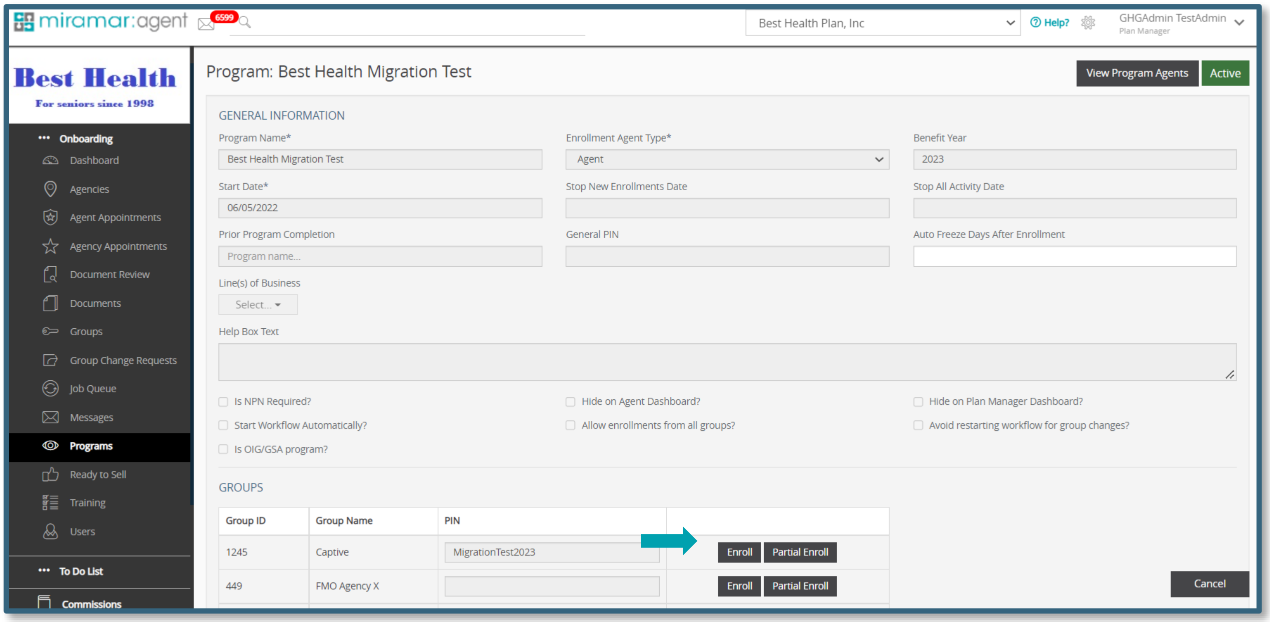
How do I enroll agents into a program?

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.

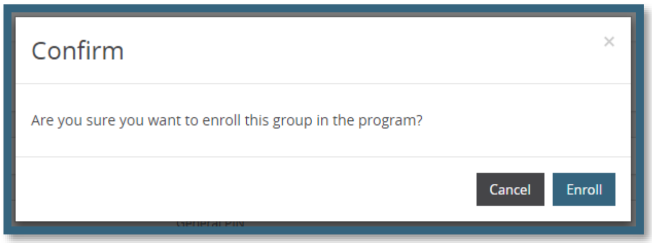
Full Group Enrollment

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.

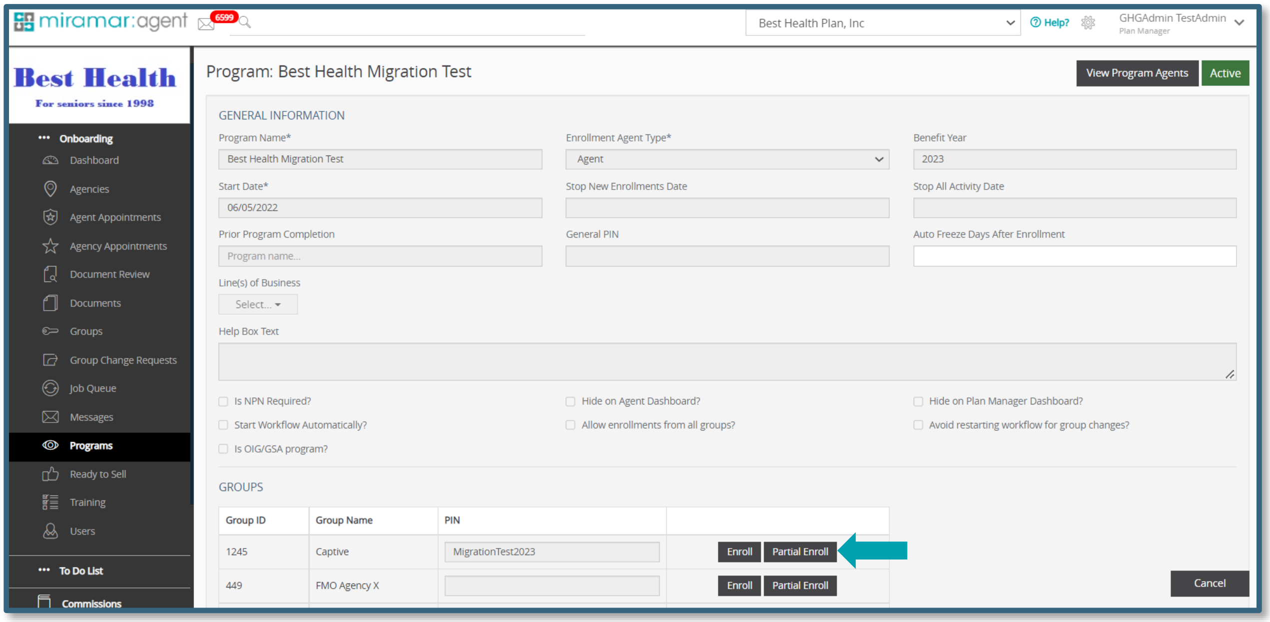


A pop-up will appear asking you to confirm you want to enroll all agents into the group.



Partial Enrollment

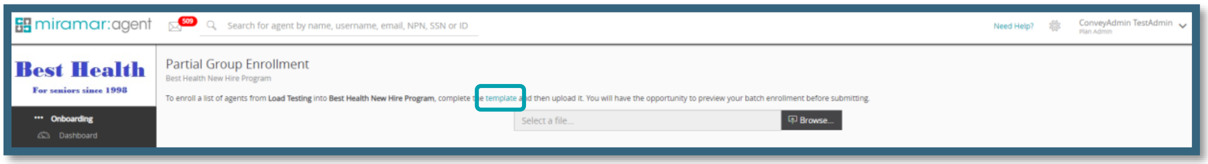
To enroll only certain individuals from a group, select **Partial Enroll** next to the group name from which you wish to enroll agents.



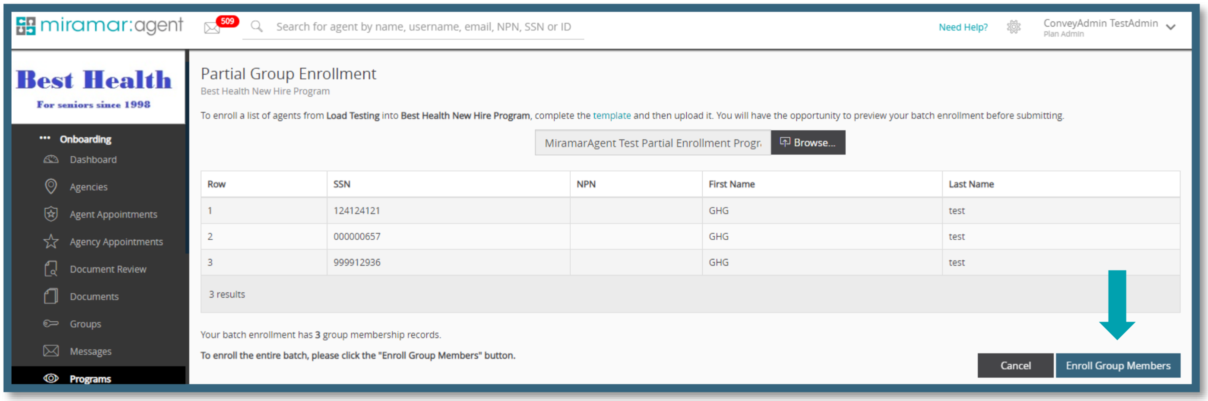
After clicking into *Partial Enroll*, you will be prompted to upload a list of agents using the provided template, which can be downloaded by clicking into the **template** link.

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.



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.

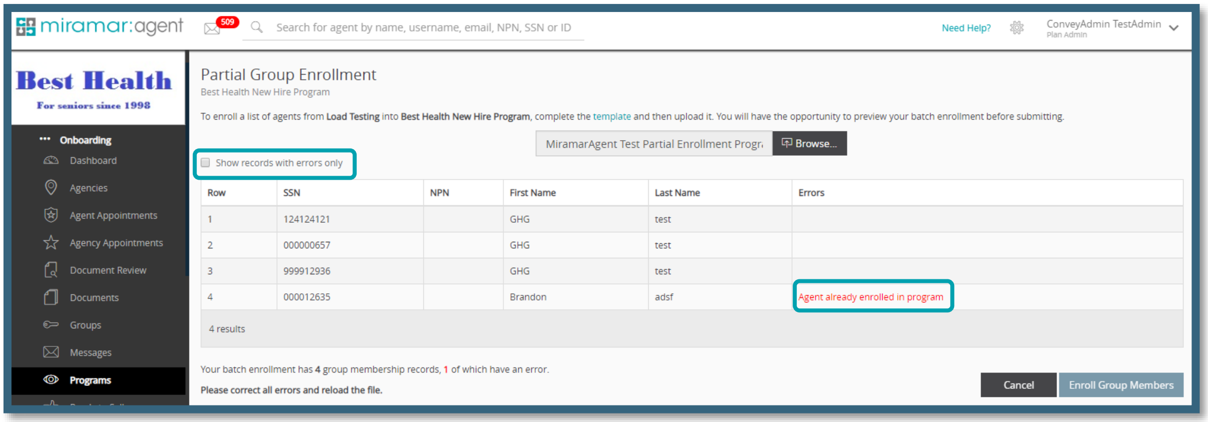


Upload Errors

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.

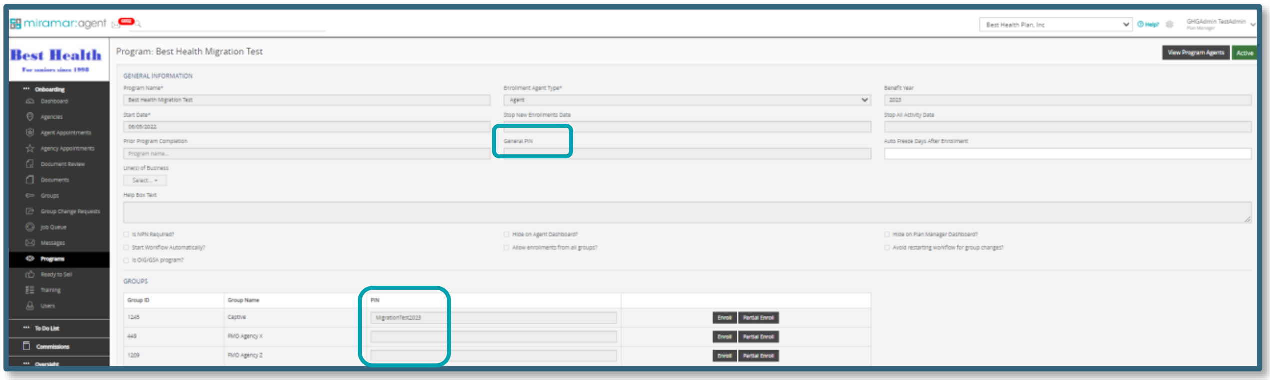


Registration PIN Codes

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.

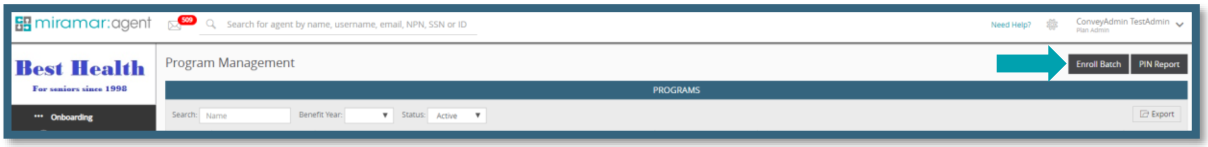
Existing agents register for the program from their agent dashboard by using either the group-specific or general PIN code.



Batch Program Enrollment

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

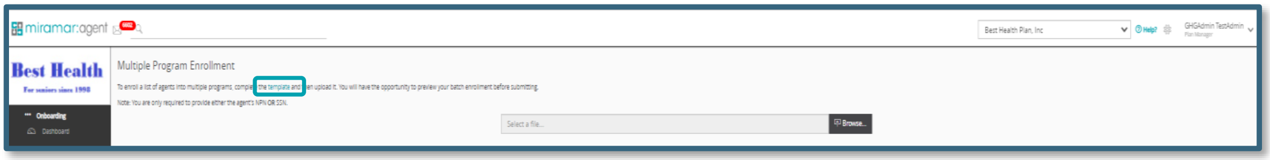
NOTE: This option should only be used for agents who are already enrolled into the system.



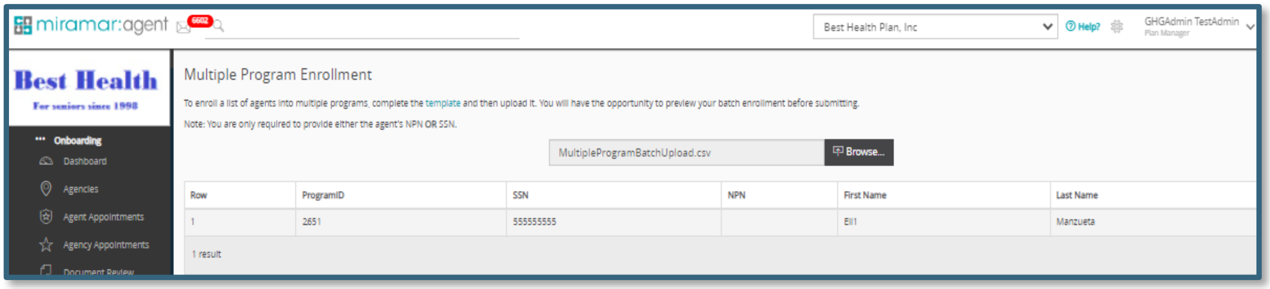
After clicking into **Enroll Batch**, you will be prompted to upload a list of agents using the provided template, which can be downloaded by clicking into the **template** link.

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.



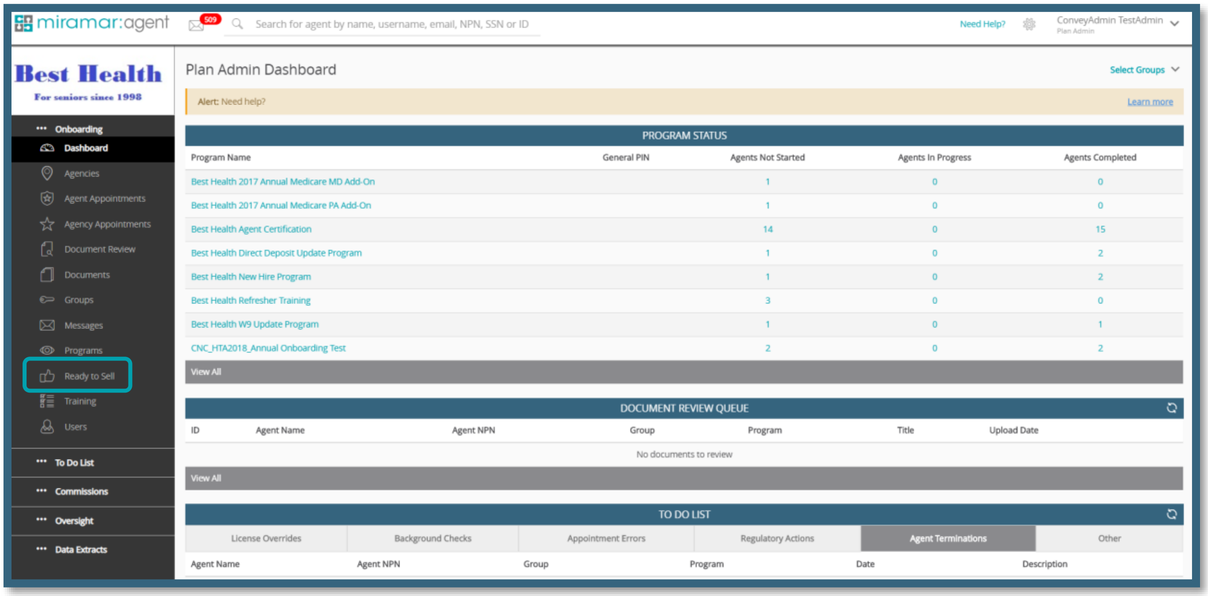
Similar to the Partial Enrollment upload, once you have selected the file, the agent's information will populate on the same screen. If the information you have uploaded looks correct and there are no errors, select **Enroll Entire Batch** at the bottom right.

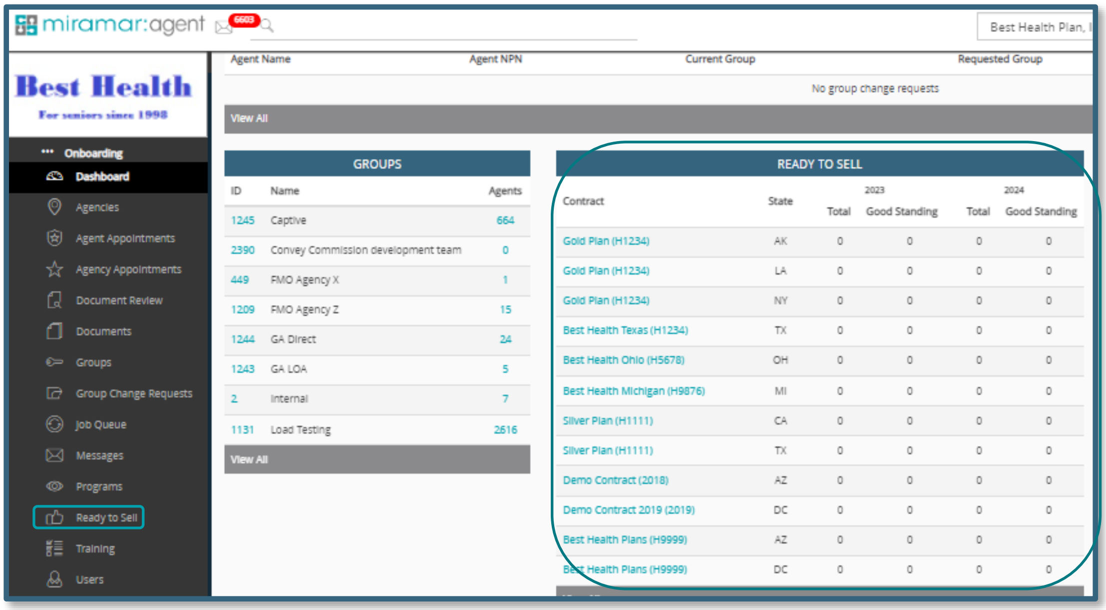


READY TO SELL

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.

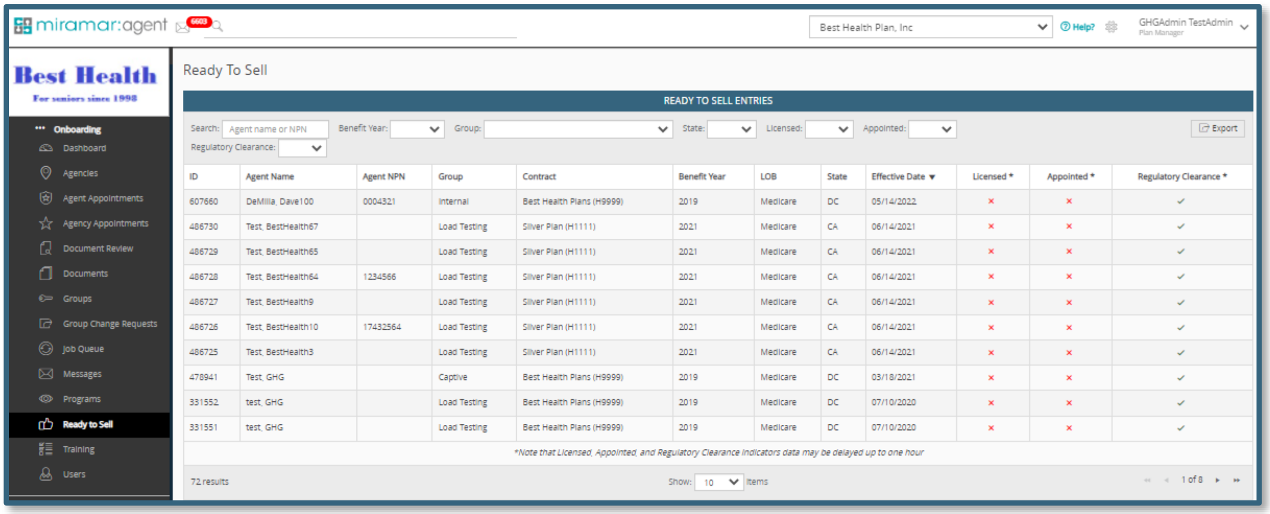
RTS is a static status assigned at the time the agent goes through his or her certification program, after he or she has completed all required steps determined by each individual plan. RTS most commonly includes the confirmation of an active license and appointment. Because RTS ties to license and appointment,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





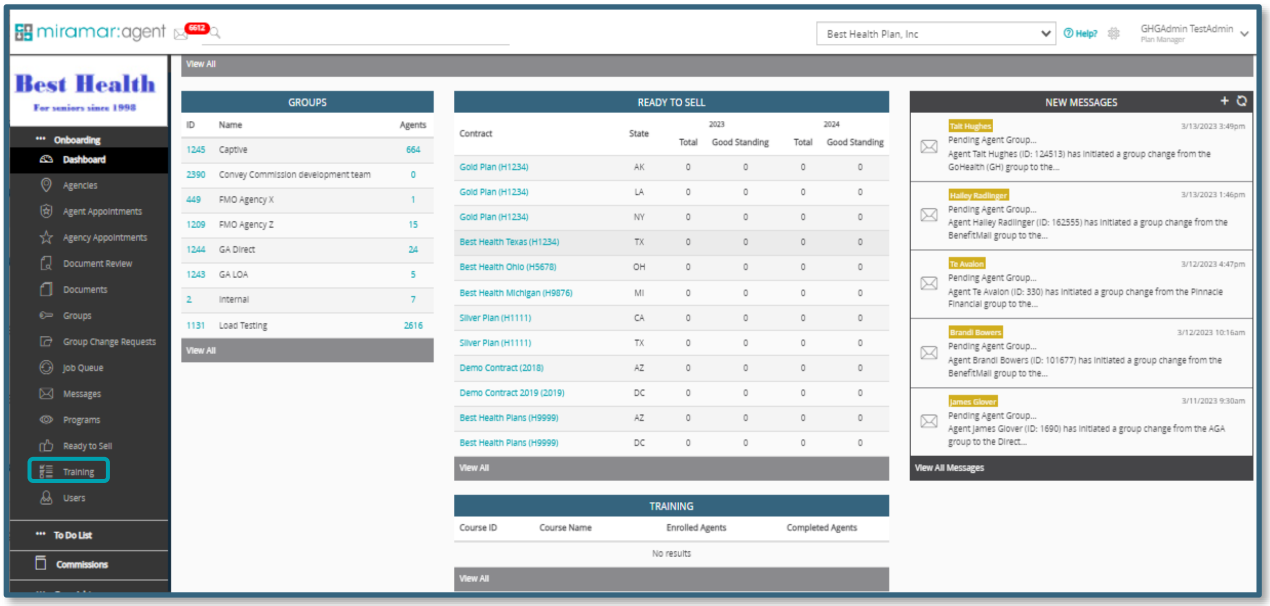
Once you have clicked into Ready to Sell or View All, you will be taken to the Ready to Sell index. Here you will find all agents with a Ready to Sell status, including the contract, state, benefit year, and effective date of their status.

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.

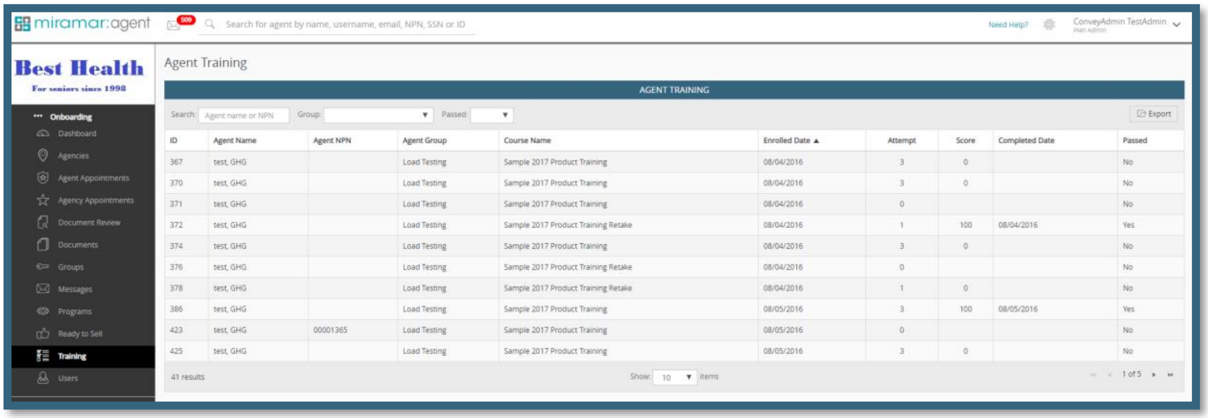


TRAINING

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.



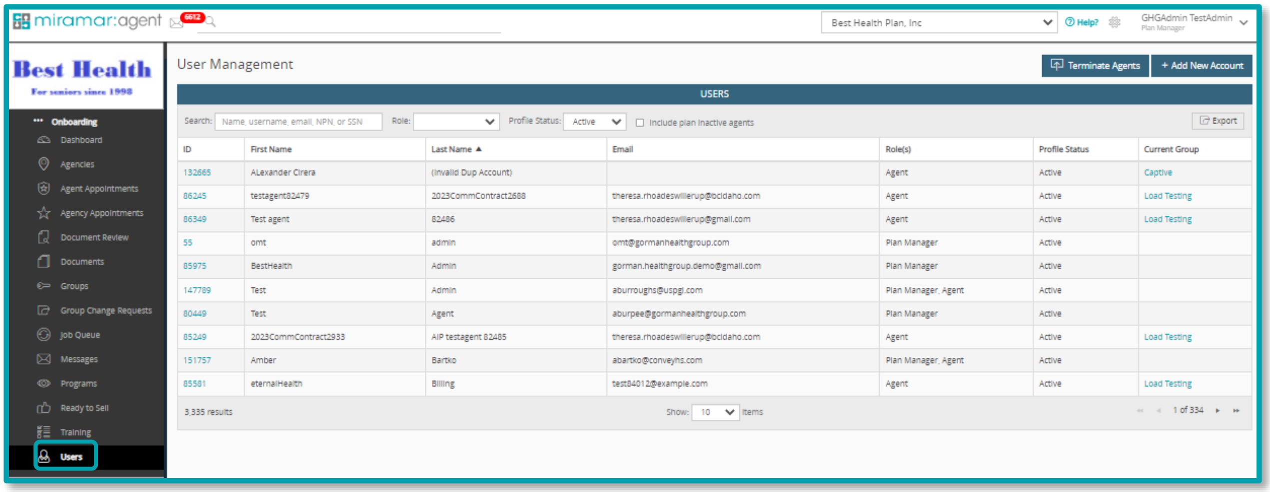
Once you have clicked into *Training* or *View All*, you will be taken to the Agent Training index where you will be able to view course enrollment date, number of attempts, score, completion date, and status.



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.



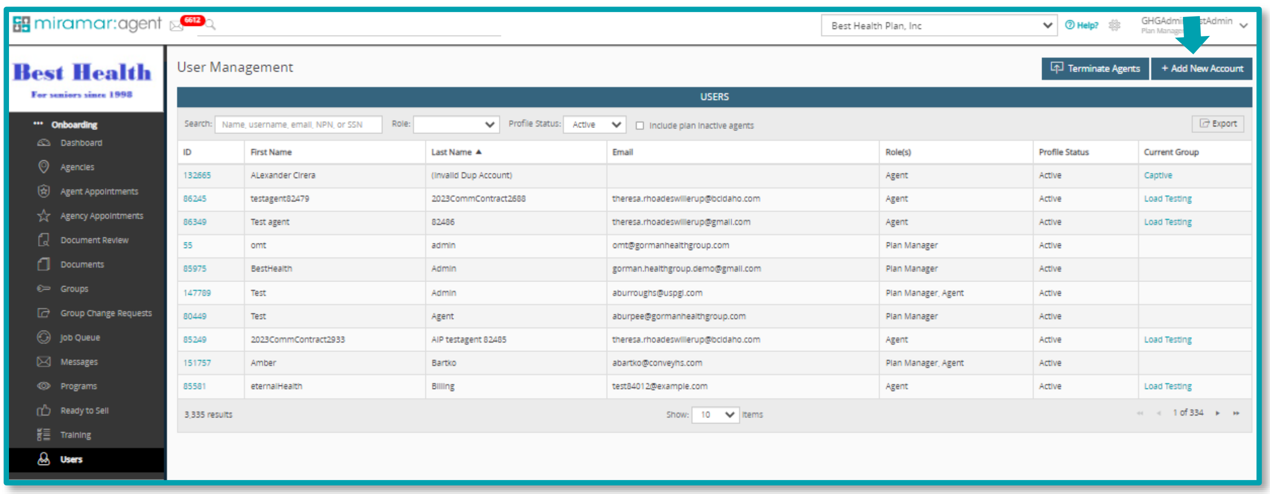
How do I add a new Plan Manager?

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.

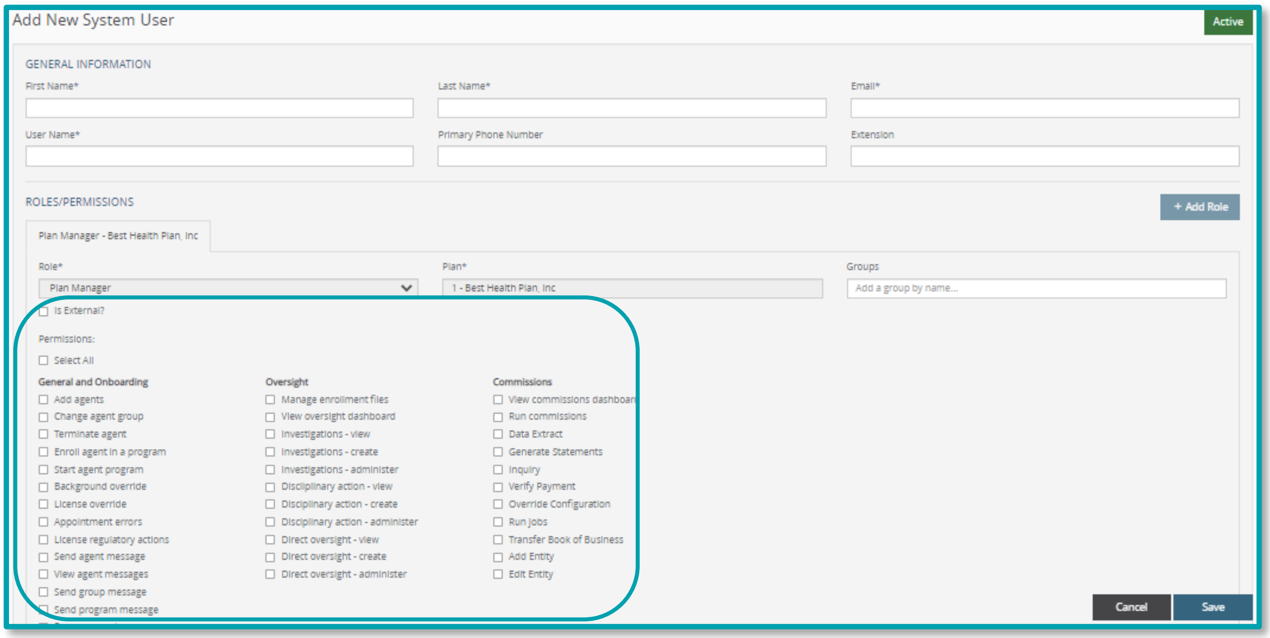
QUICK TIP: It is best practice to add plan administrator permissions to an existing agent account, as agent abilities cannot be added to a plan administrator account.



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.

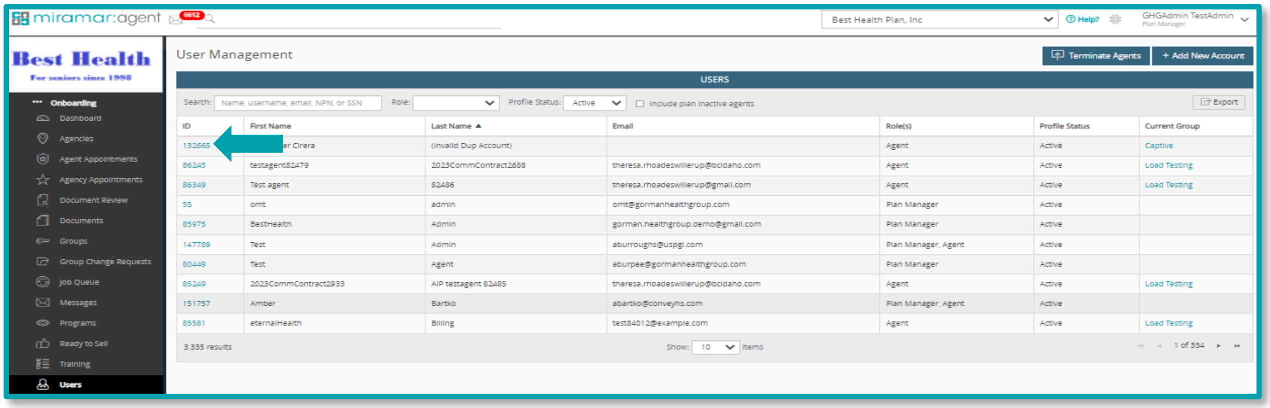
Select which permissions you want to give the plan manager. If they should only be able to view certain groups, be sure to select the group(s) by typing them into the text box under *Groups.* Once you have selected the permissions you wish to give them, click **Save.**

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

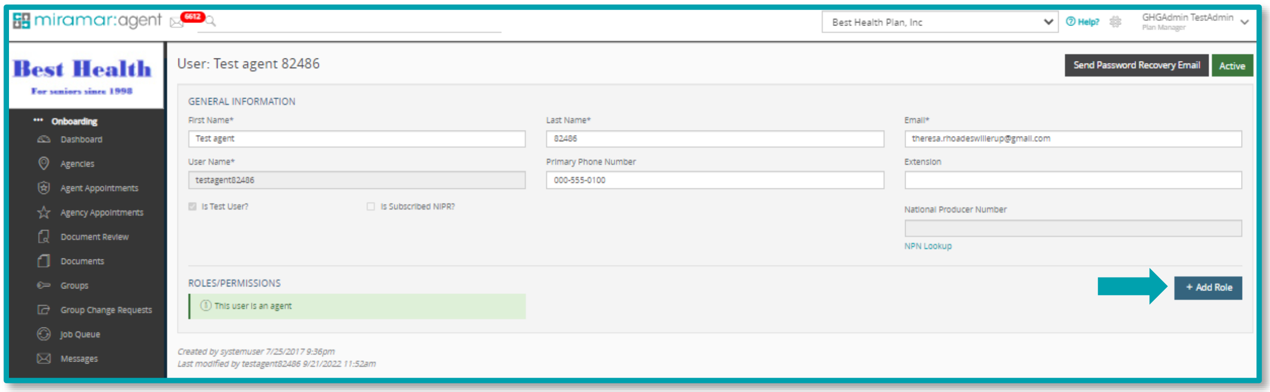


Existing Agent

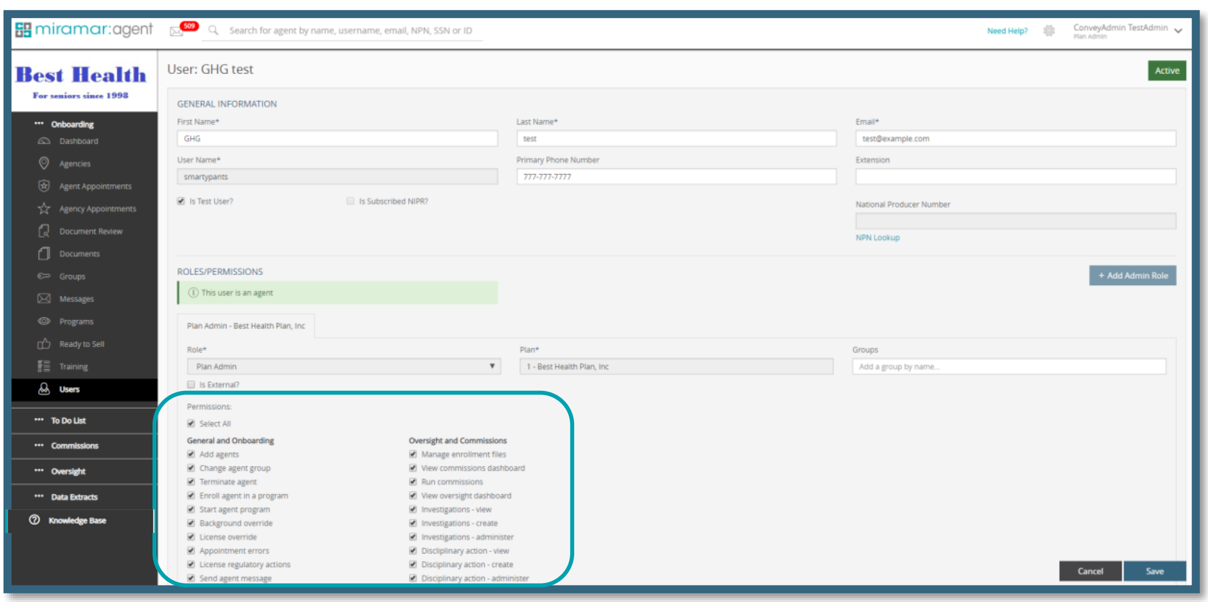
To add plan administrator permissions to an existing agent, start by searching for the agent under the User Management index. Click into the *agent's ID*.



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**.



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.**



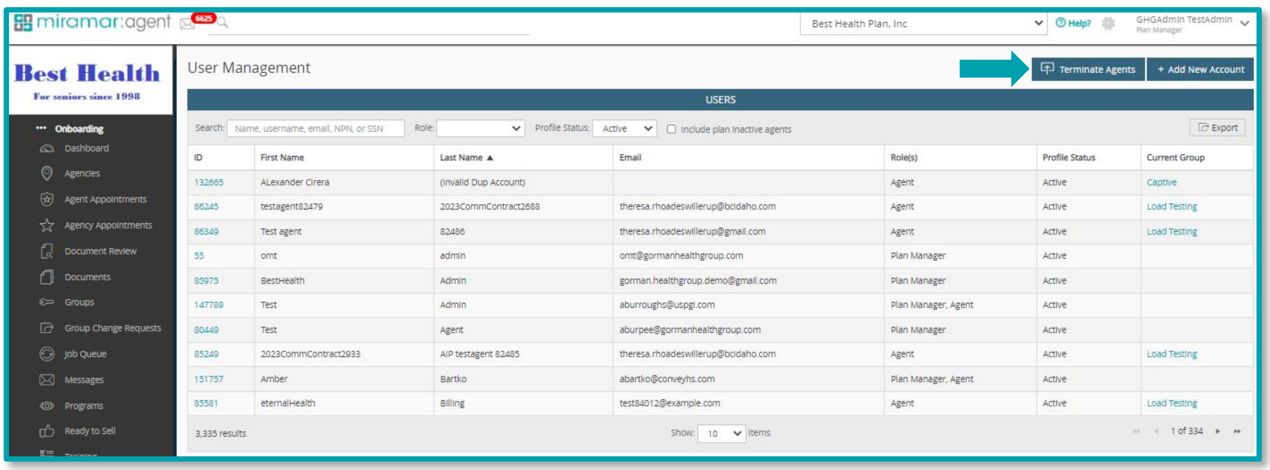
How do I terminate an agent at the plan level?

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**.

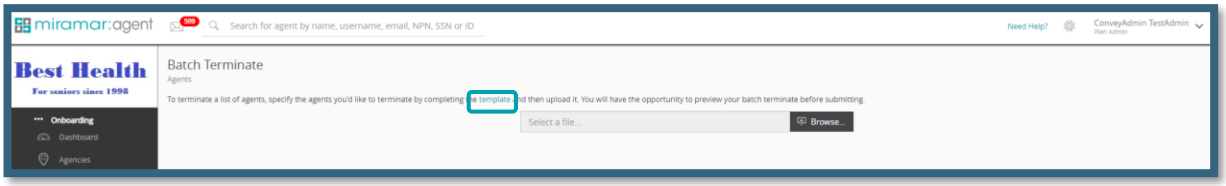
Enter the User Management Index to access your options regarding Agent addition or termination. To initiate an individual or batch termination, click **Terminate Agents**.



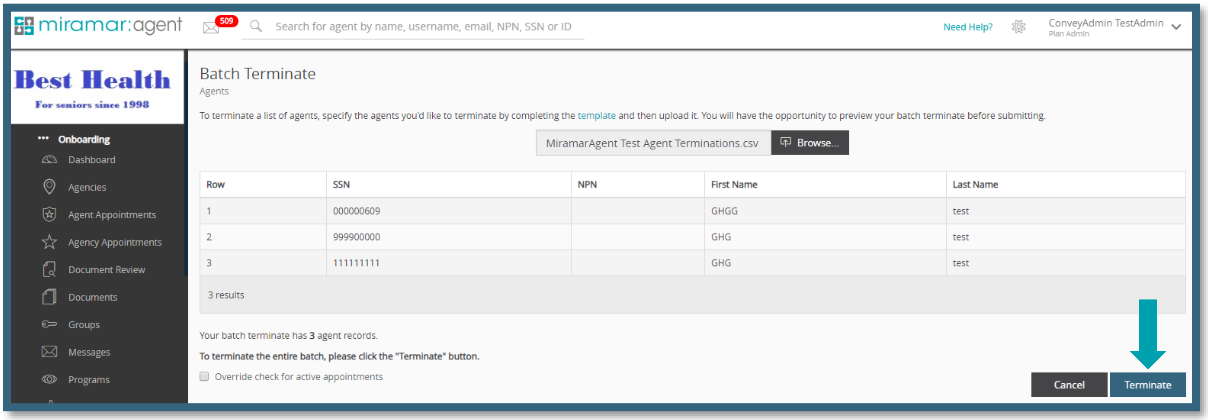
After clicking into *Terminate Agents*, you will be prompted to upload a list of agents using the provided template, which can be downloaded by clicking into the **template** link.

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.


miramar:agent
509
Search for agent by name, username, email, NPN, SSN or ID
Need Help?
ConveyAdmin TestAdmin
Plan Admin
Best Health
For seniors since 1998
Onboarding
Dashboard
Agencies
Batch Terminate
Agents
To terminate a list of agents, specify the agents you'd like to terminate by completing
template
nd then upload it. You will have the opportunity to preview your batch terminate before submitting.
Select a file...
Browse...

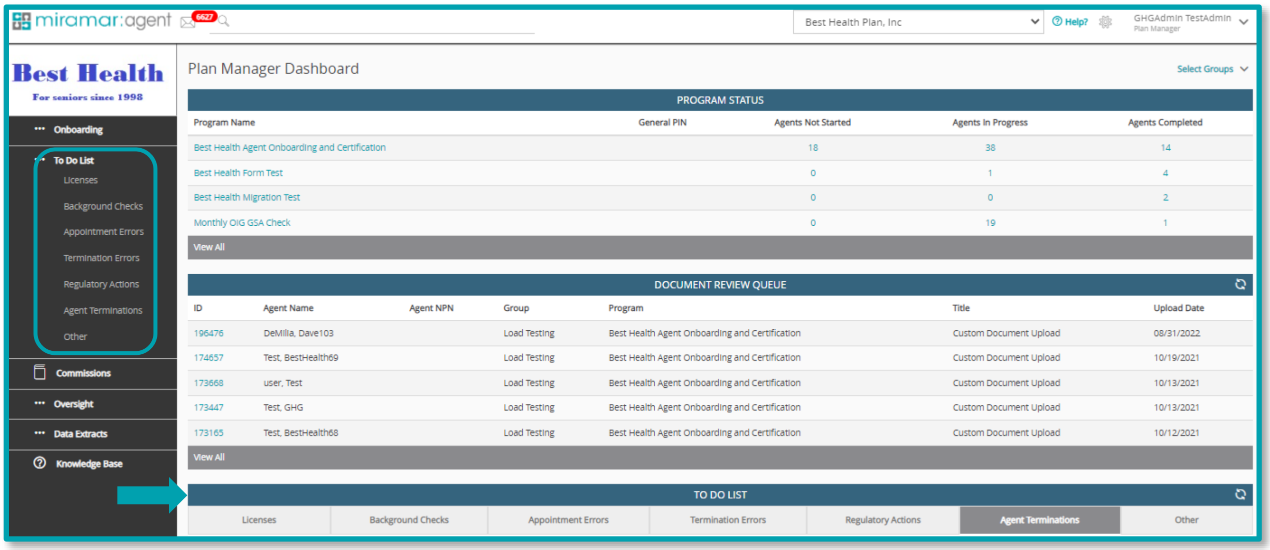
Once you have selected the file, the agent's information will populate on the same screen. If the information you have uploaded looks correct and there are no errors, select **Terminate** at the bottom right.



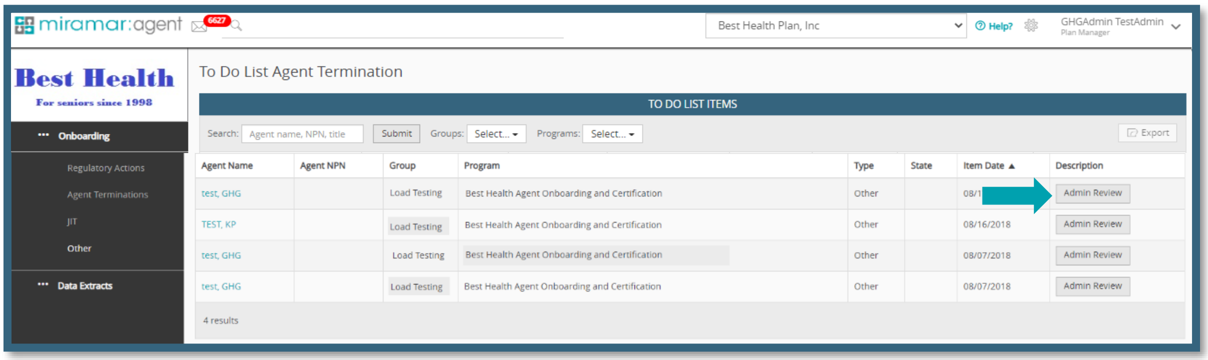
TO DO LIST

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.

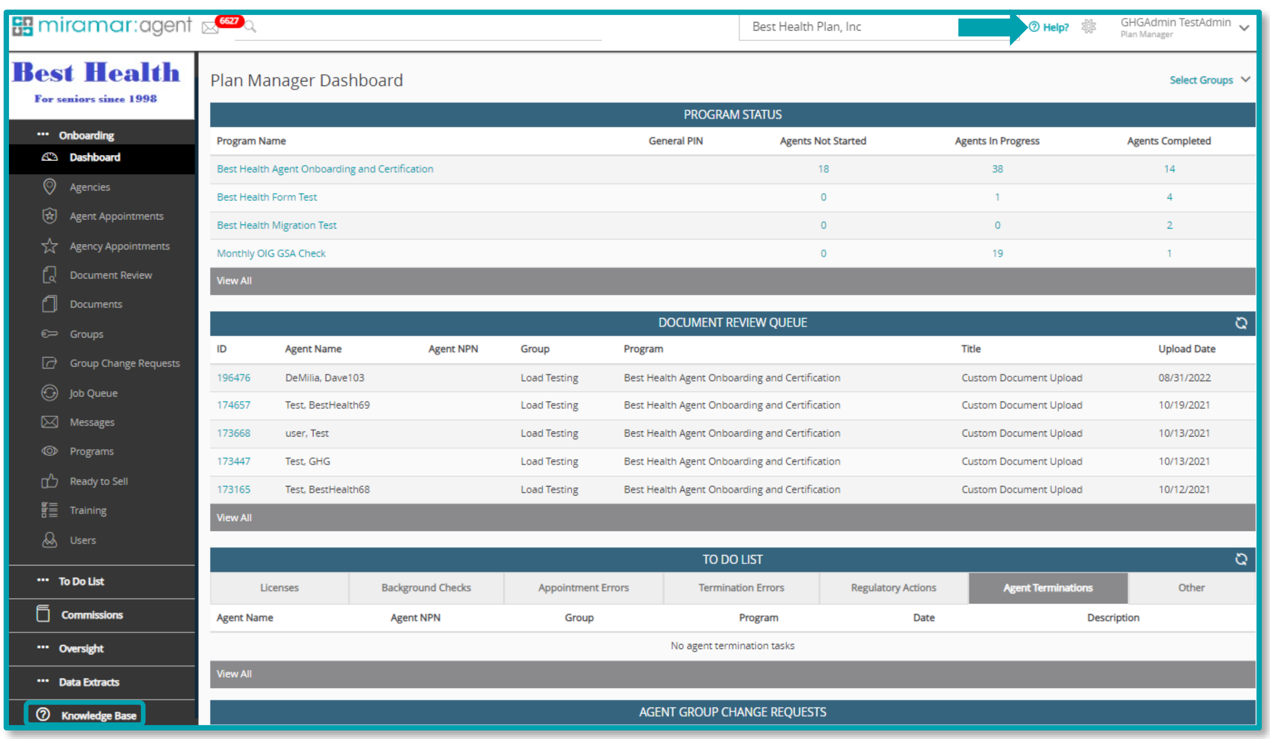


To manage each individual queue, click into the actionable button under the description of each queue.

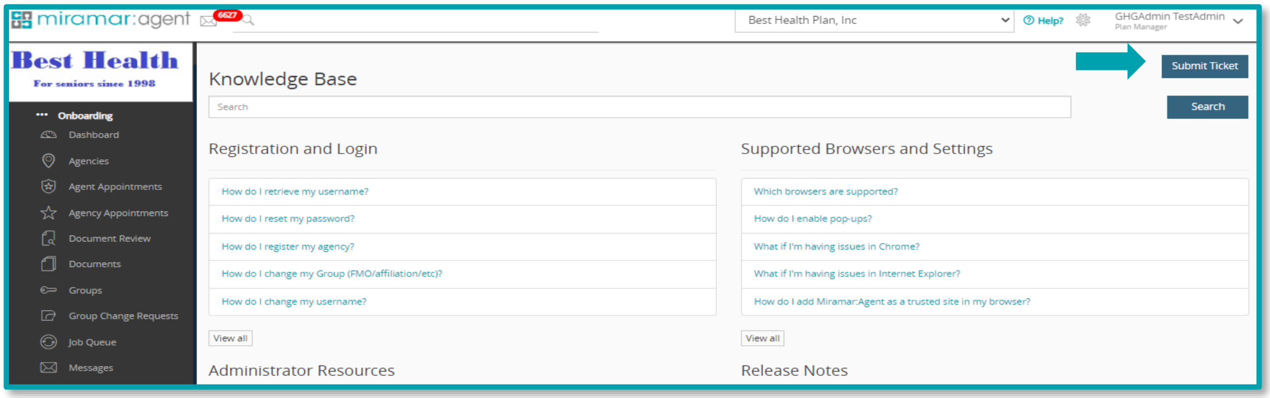


KNOWLEDGE BASE

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.



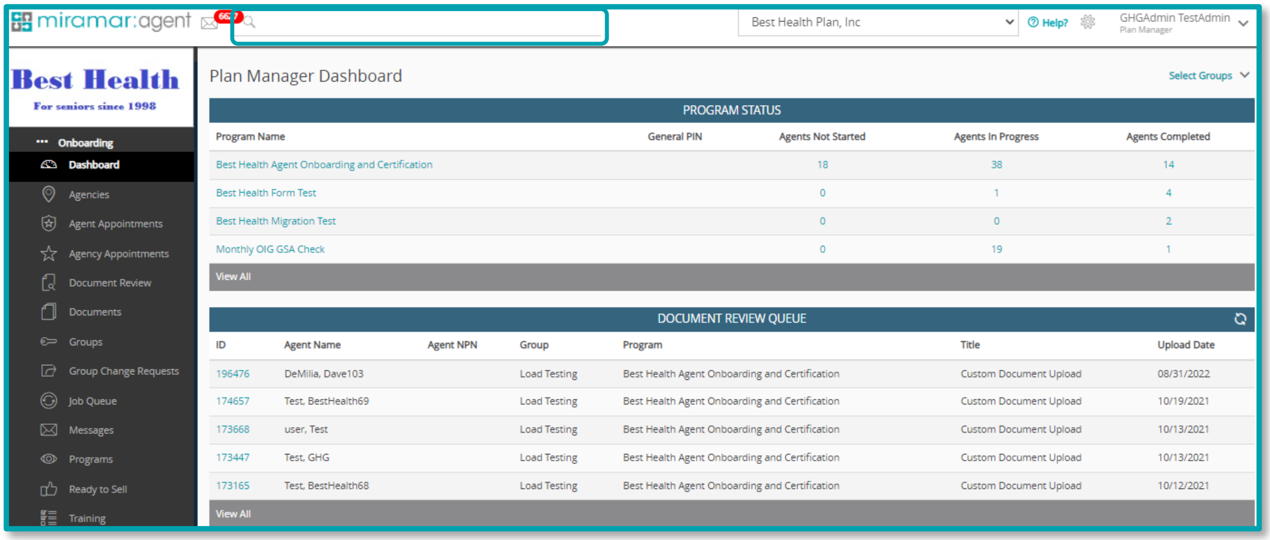
Frequently asked questions and helpful training tips are easily available from the Knowledge Base, including this user guide. Frequently asked questions and helpful training tips for agents can be found on the Knowledge Base homepage. If you need assistance, you can log a ticket by clicking **Submit 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.



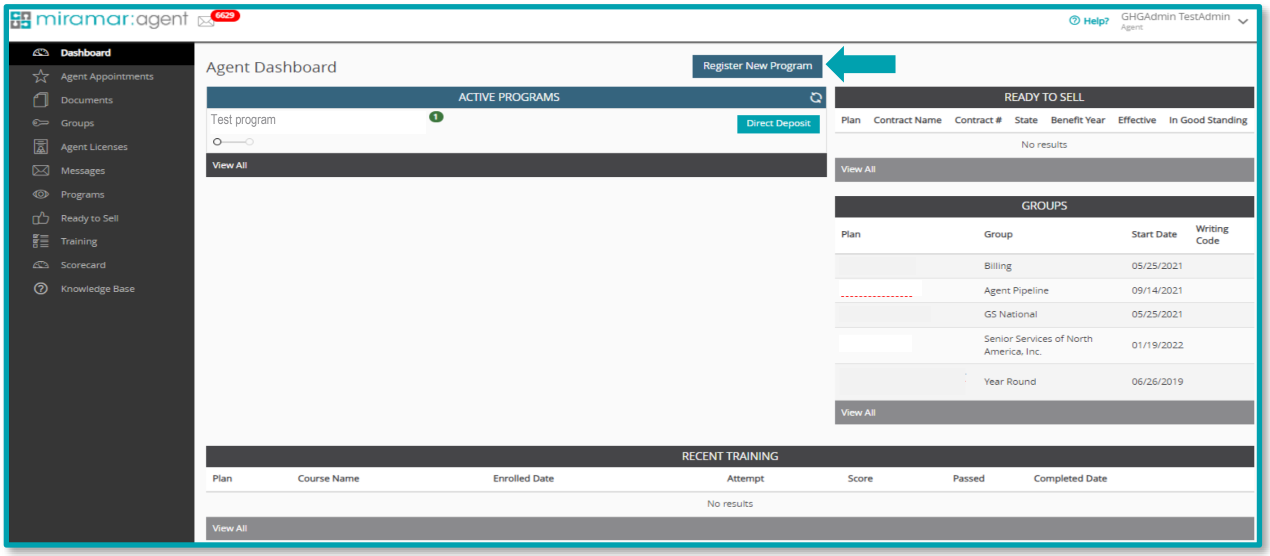
QUICK TIP: Searching with the most unique piece of information will narrow your results. For example, when searching for John Smith NPN# 12345, entering only the NPN# 12345 will provide the most concise search.

AGENT DASHBOARD

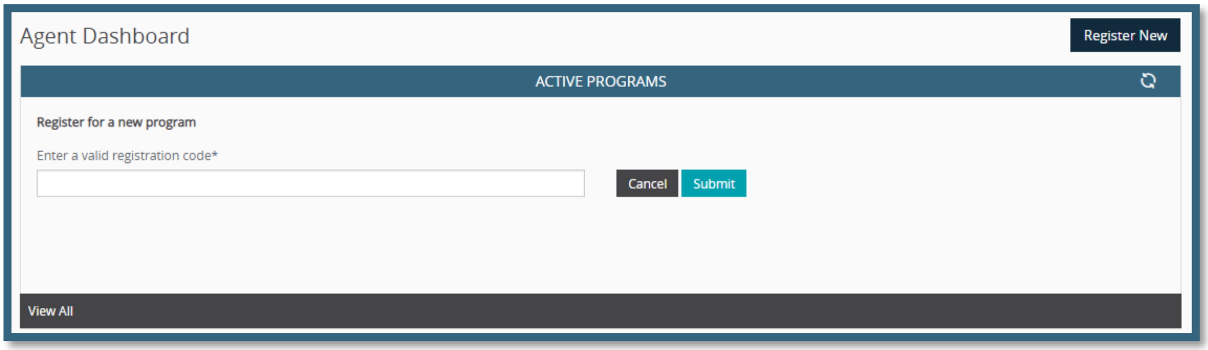
Once you have located an agent's account, you will see his or her dashboard as he or she would see it when logged in to the system. However, as an administrator, you will have some additional functionality as well. You will only be able to see agents' accounts within your specific plan.

How do I register an agent for a program?

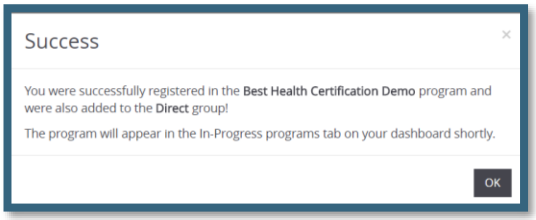
You can register for a new program from the Agent Dashboard by clicking the **Register New** button at the top right of the *Programs* section near the top of the page.

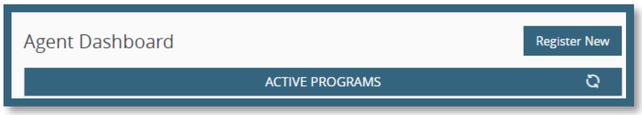


Once you click the button, you will be prompted to enter the program registration PIN code, found under the *Program Setup,* and click **Submit**. PIN codes are not case sensitive.



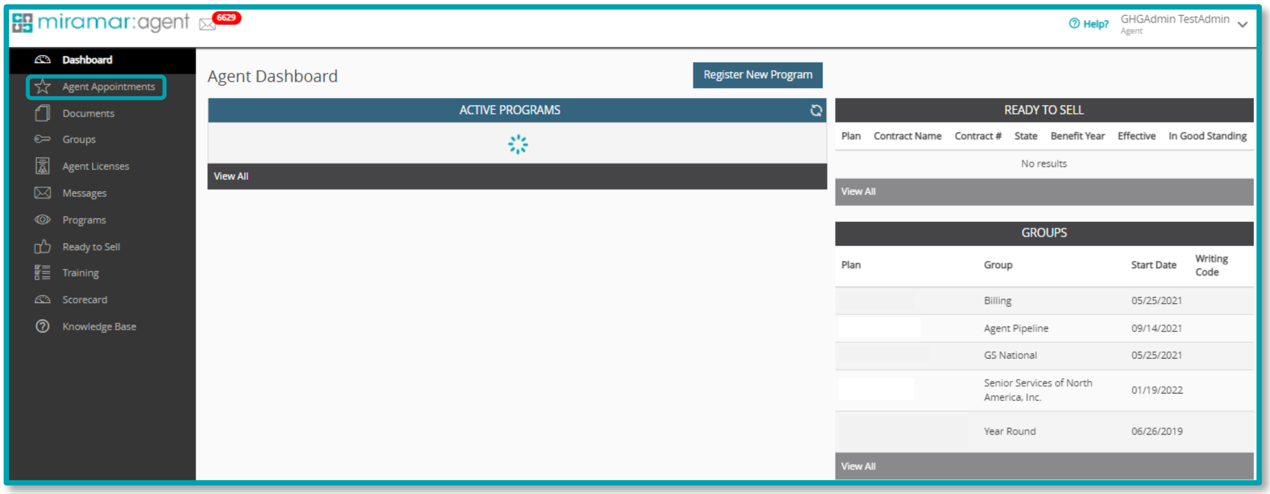
The following screen will pop up to show you have registered successfully. After clicking **OK**, you can click the *refresh icon* in the top right corner of the Programs widget to see the new program on your dashboard.





AGENT APPOINTMENTS

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

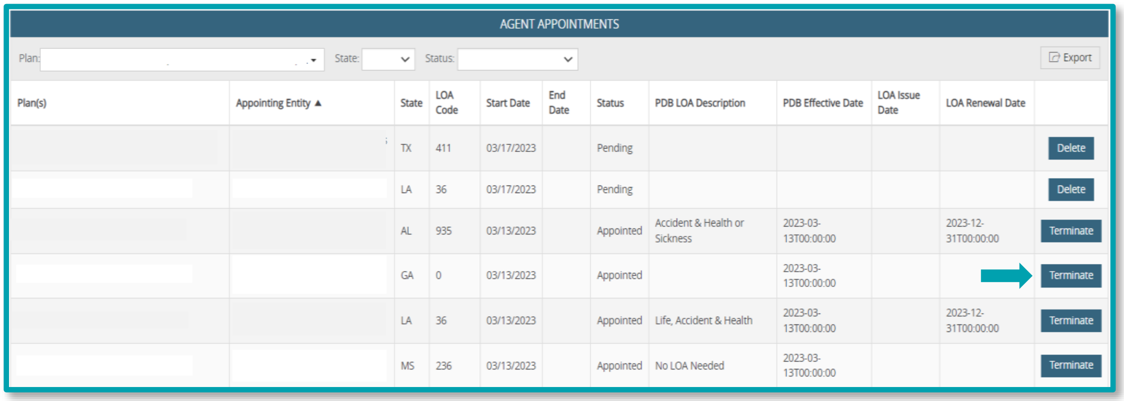


Once on the *Agent Appointments* screen, you can filter by appointment status and state.

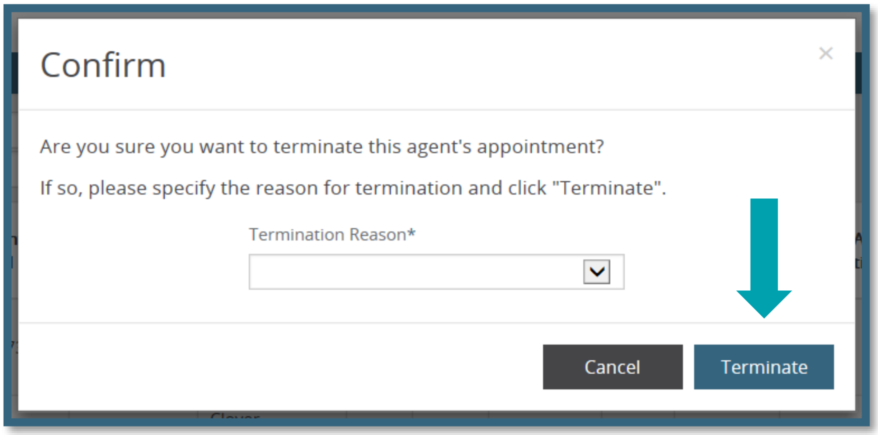
NOTE: Appointments for plans shown under the agent's Groups tab of his or her dashboard are the only appointments that will display in the system.

How do I terminate an agent's appointment?

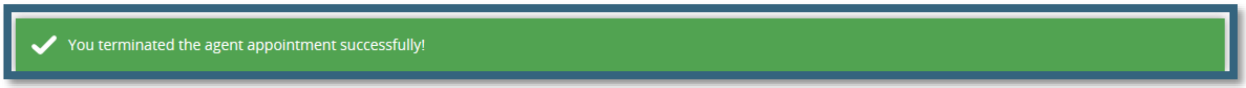
From the *Agent Appointments* index, you have the ability to terminate the agent's appointments. Click **Terminate** next to the appointment you wish to terminate.



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**.

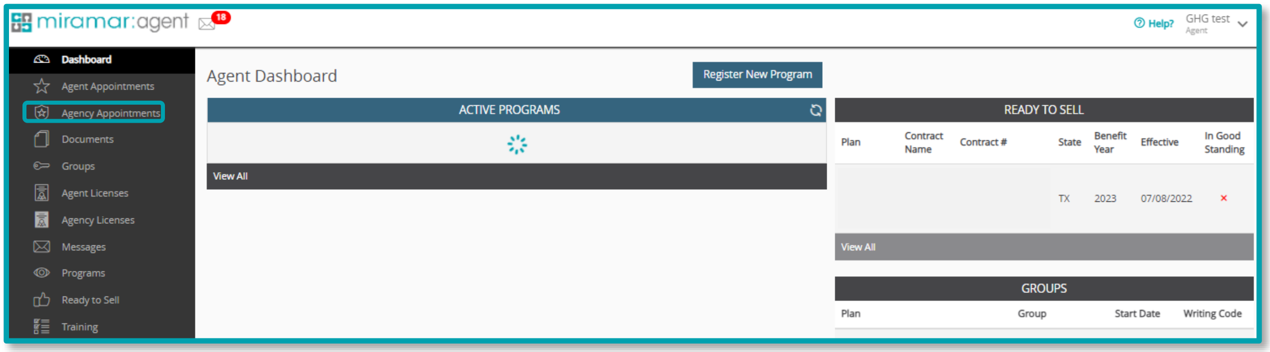

Confirm
Are you sure you want to terminate this agent's appointment?
If so, please specify the reason for termination and click "Terminate".
Termination Reason*
Cancel
Terminate

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

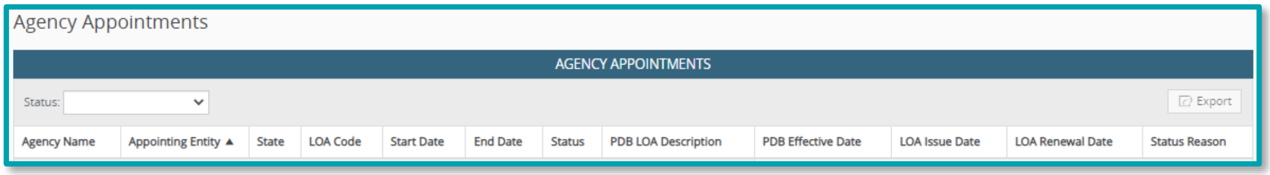


AGENCY APPOINTMENTS

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.

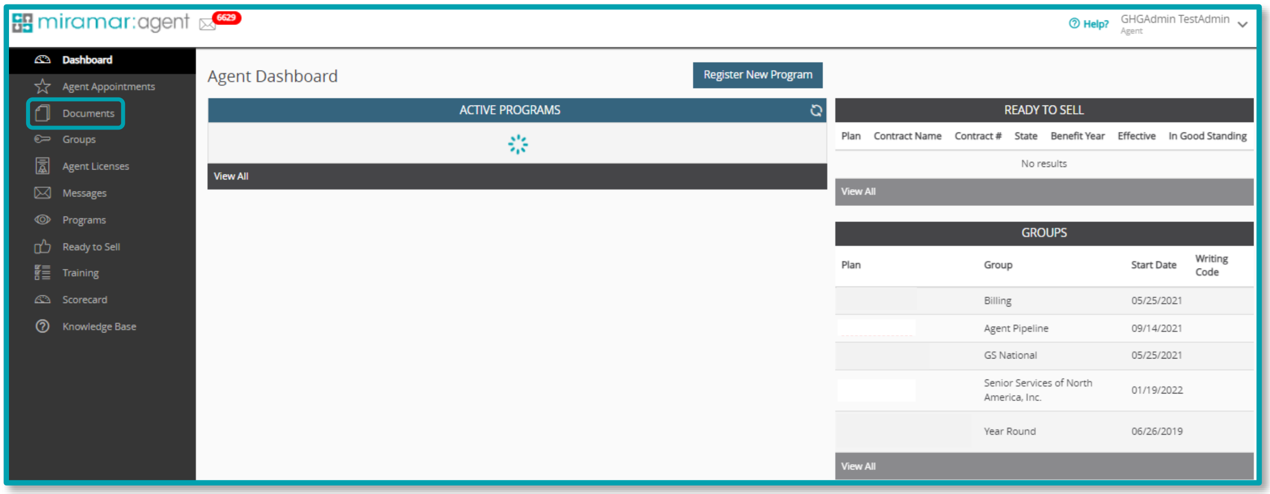


Appointment information is refreshed on a daily basis. Once you are in the agent's Agency Appointment index, you can filter by status.



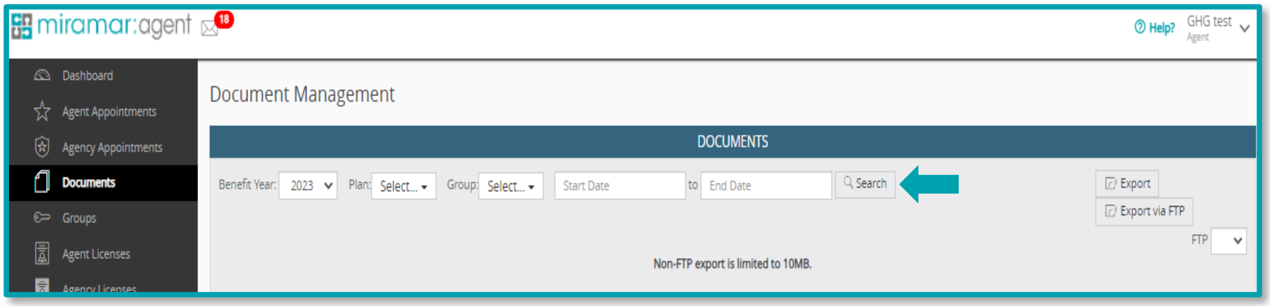
DOCUMENTS

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

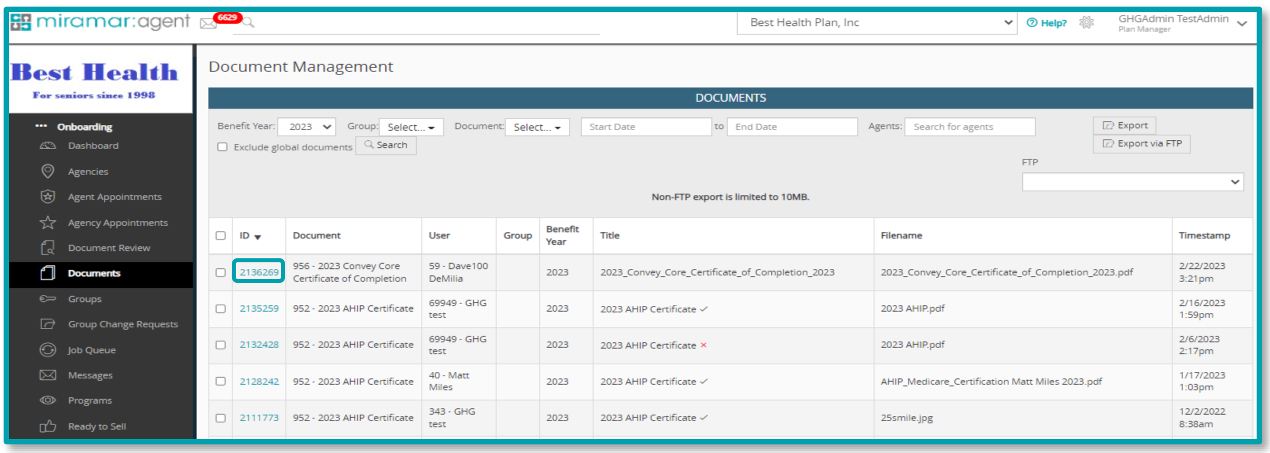


Documents you will find here include training completion certificates, forms that were saved within your plan's onboarding program, or any other document the agents uploaded themselves into their Documents section.

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*.



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 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 (\)

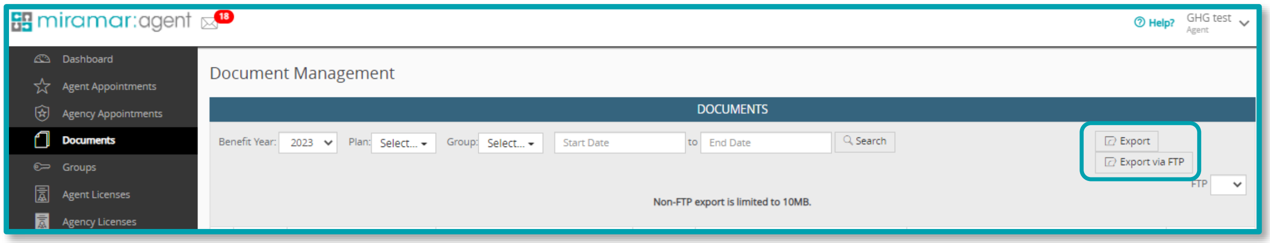
How do I export an agents documents?

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.

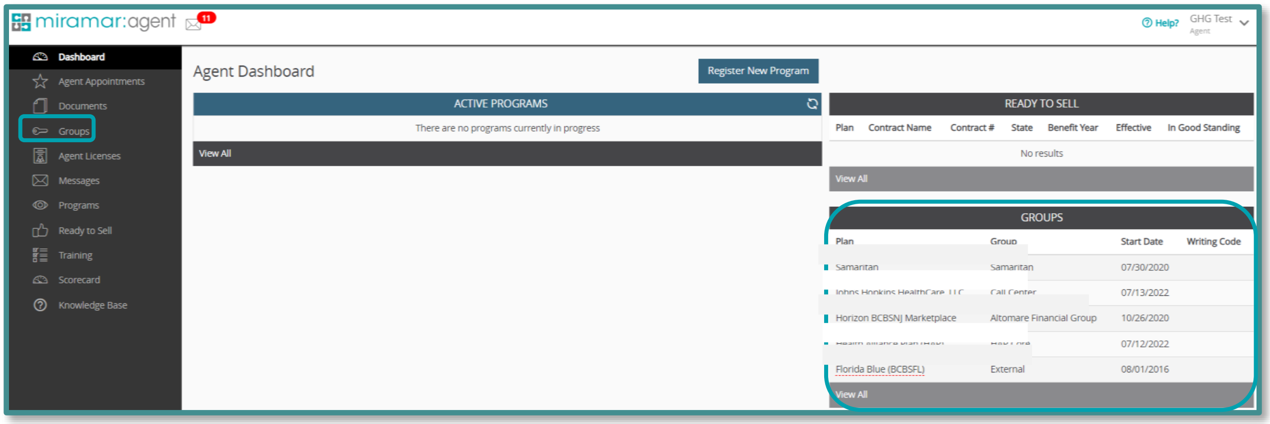
You can also export an unlimited amount of reports by checking off the boxes next to the report ID, selecting the FTP that you want it to deliver to and clicking **Export via FTP**.

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.



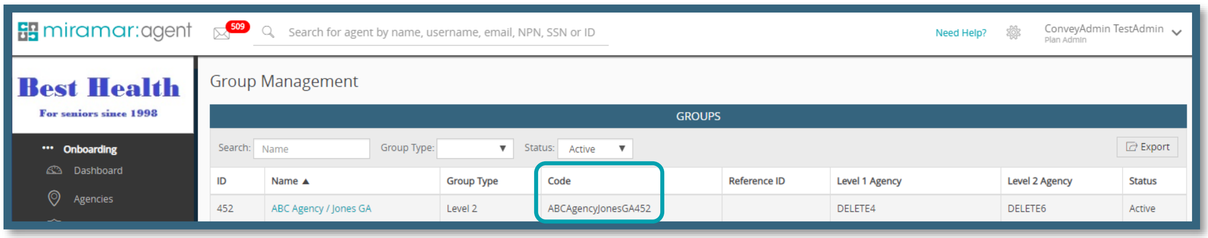
GROUPS

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.

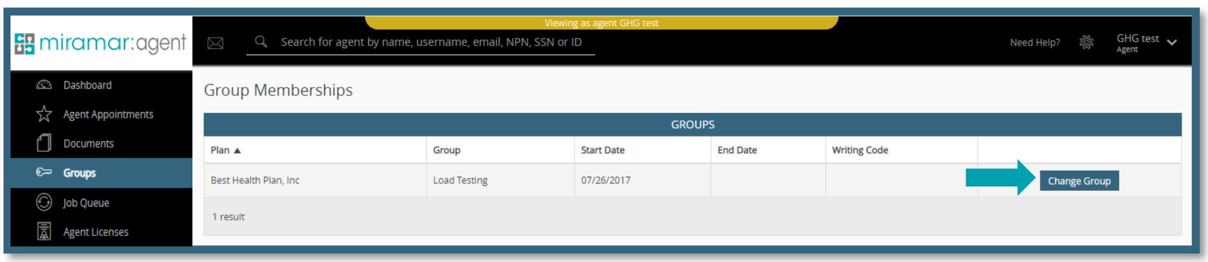


How do I initiate a group change?

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.

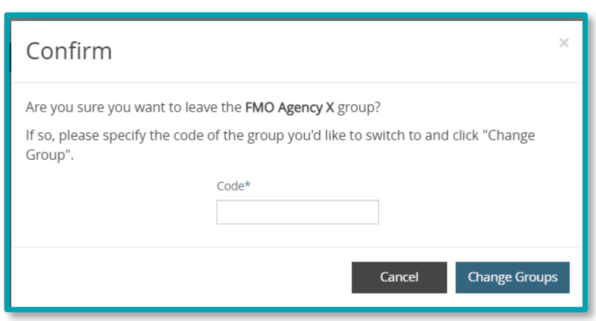


From the agents *Group Memberships* index, you can initiate a group change for an agent by clicking **Change Group** next to the agent's current group.



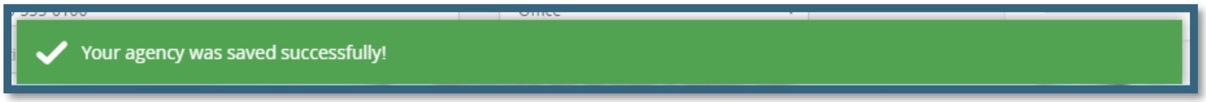
Once you have clicked Change Group, a confirmation box will pop up on the screen. You will need to enter the *Group Code* for the group to which you are wanting to change. This is found on the Group Management index.

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

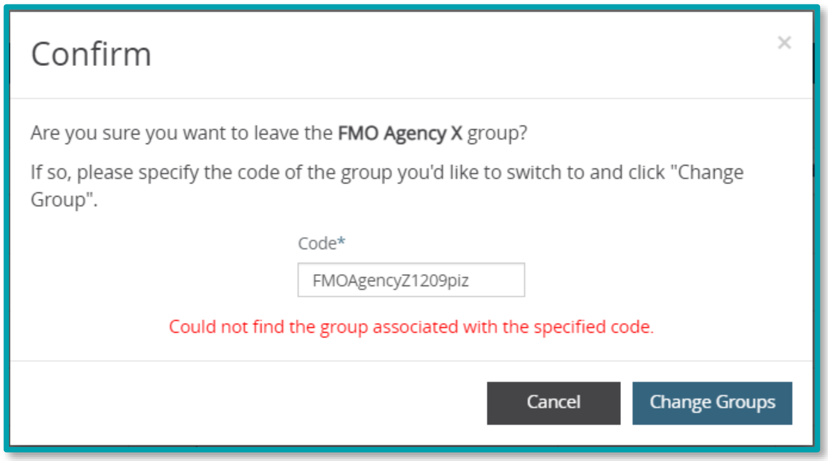


Click **Cancel** at any time to return to the agent information page.

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

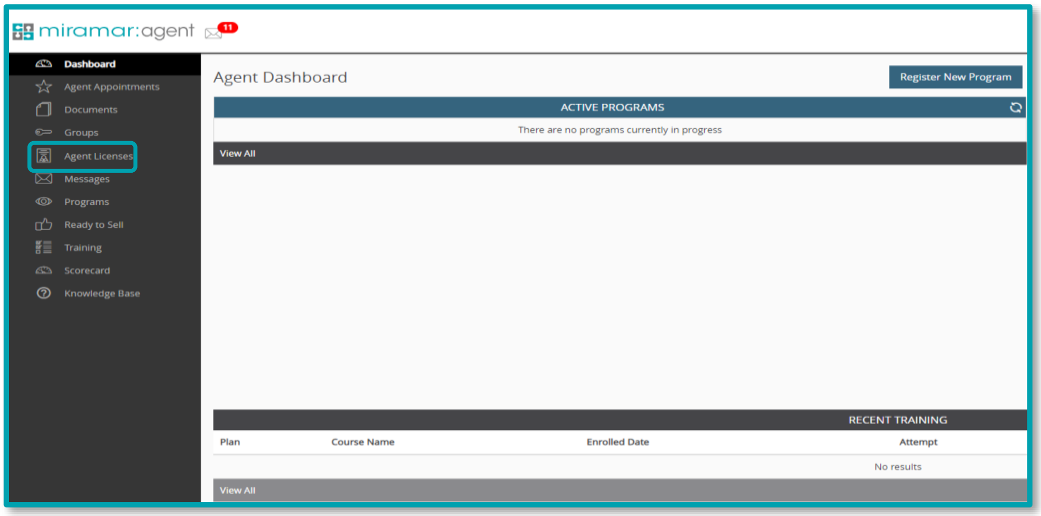


If the group code you entered is invalid, you will get the error message in red below. Refer to the Group Management index to confirm the group code.



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

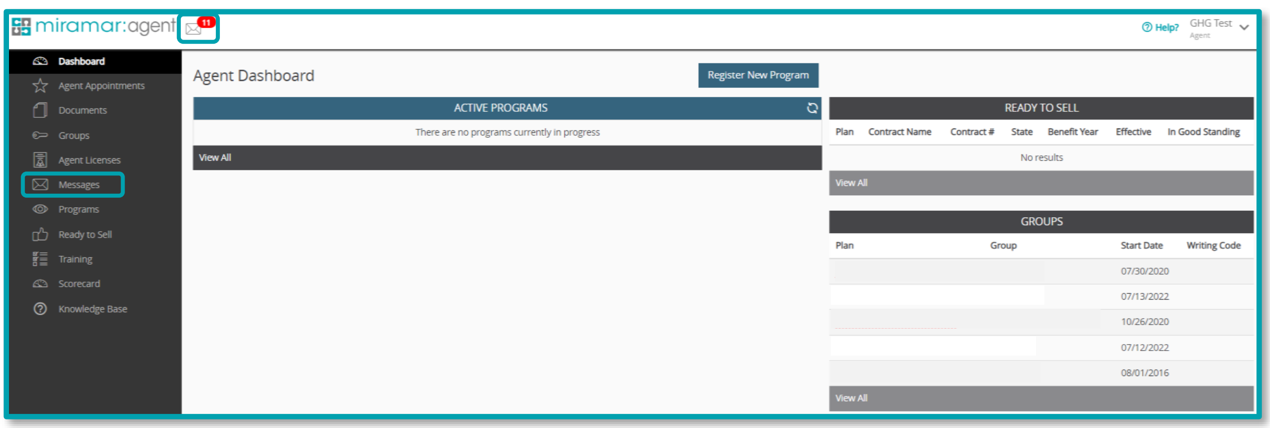
Export

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

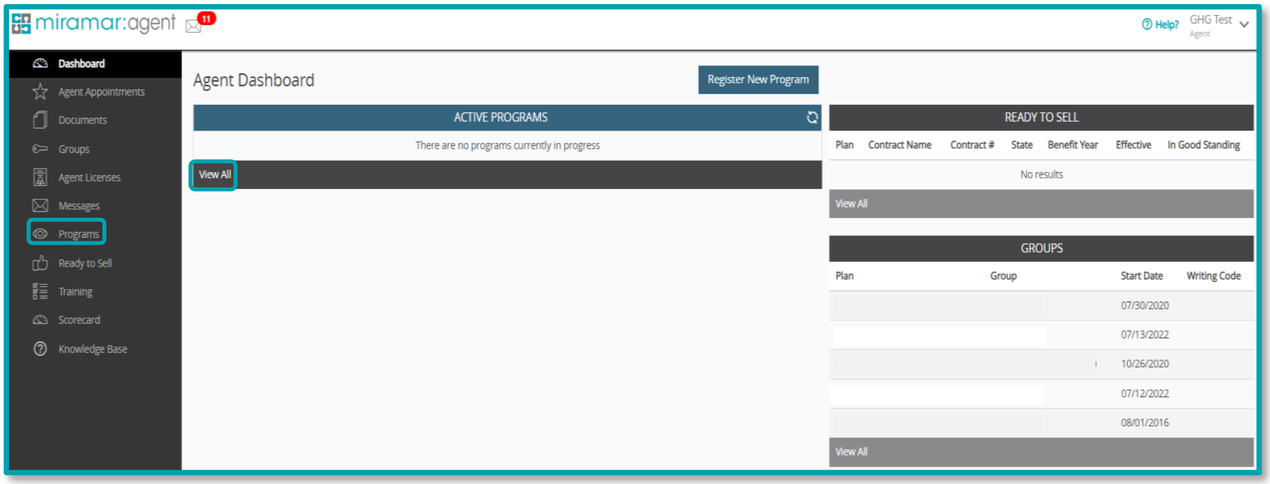
MESSAGES

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.

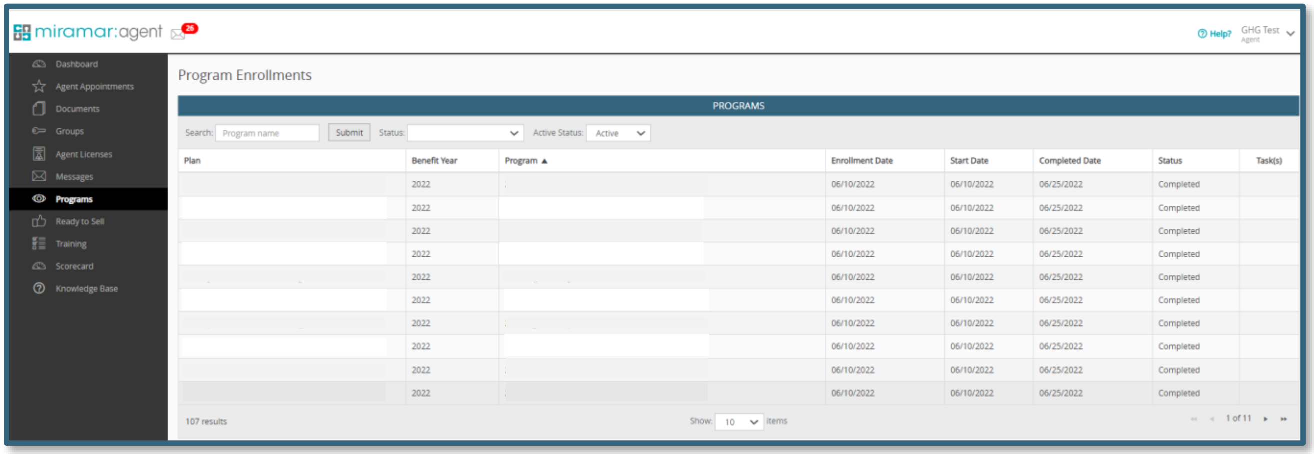


PROGRAMS

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.



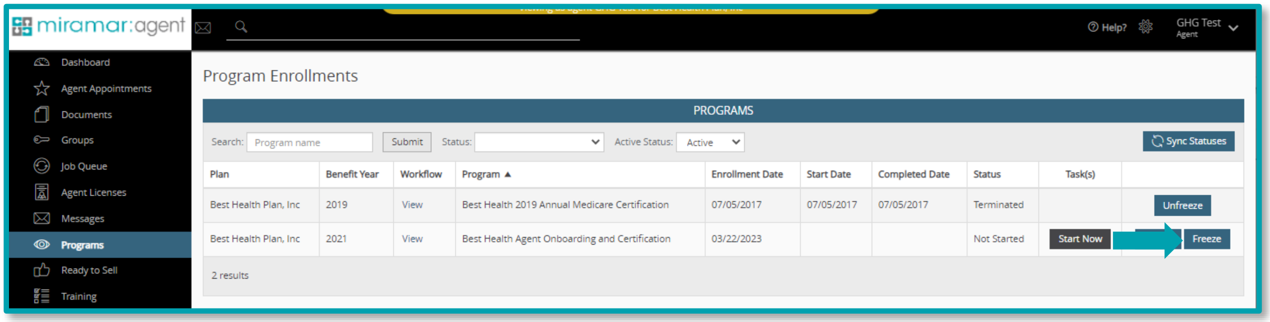
From the *Program Enrollments* index, you can search by program name and filter by program status. From this index, you have insight into when the agent was enrolled, when they started, when they completed, and if they are in progress, and what their current tasks are.



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

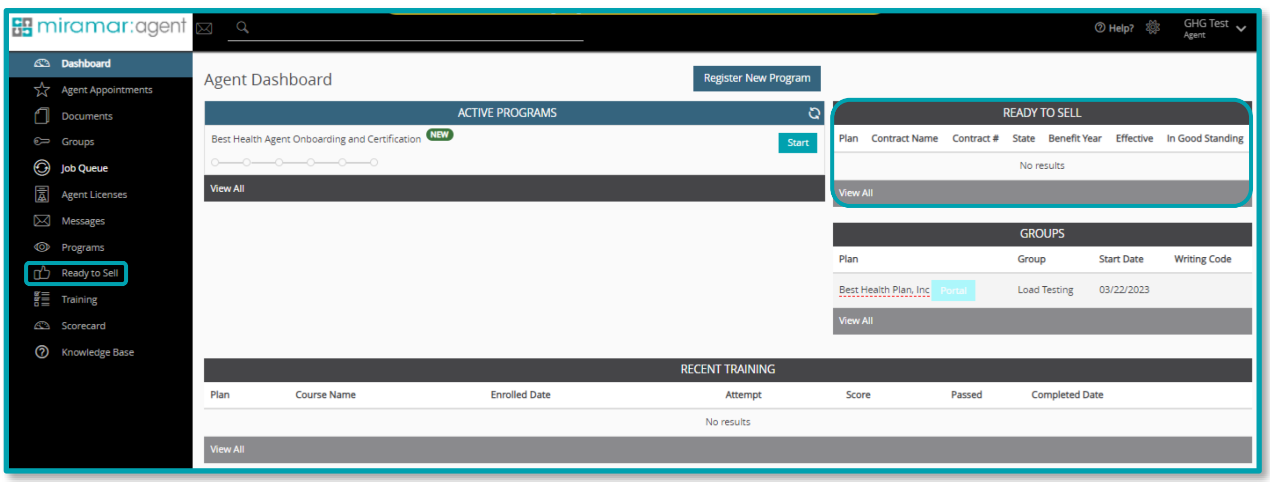
As a plan manager, you have the ability to freeze or unfreeze an agent's program. To freeze a program means you are no longer allowing the agent to action the program, and you can unfreeze at any time.

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.

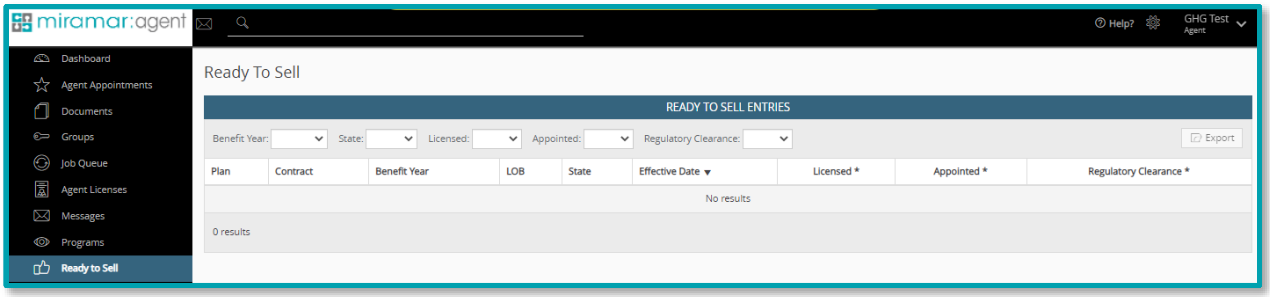


READY TO SELL

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.

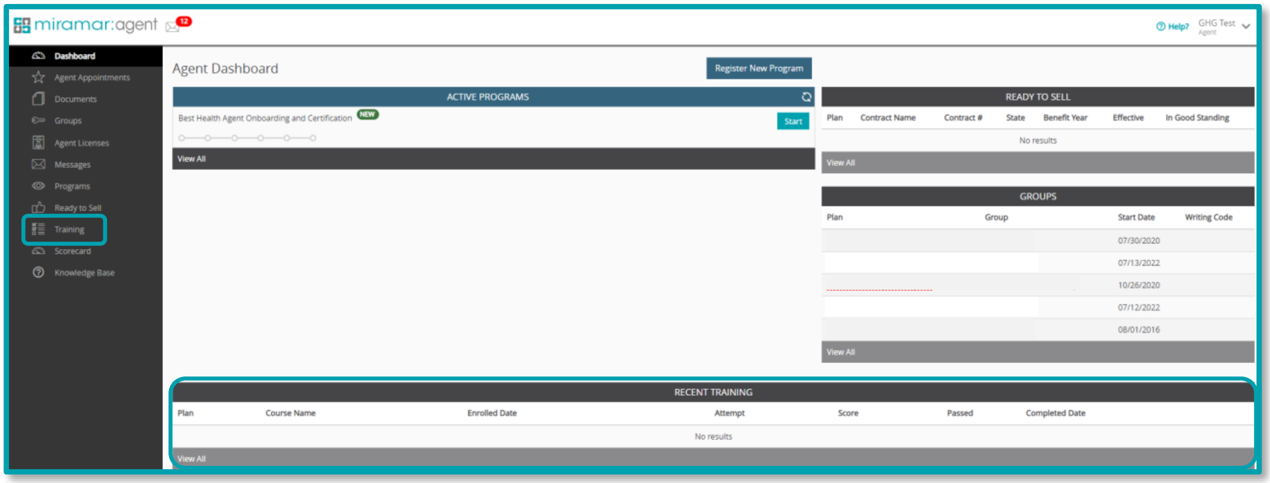


From the Ready to Sell index, you can filter by Benefit Year and State.

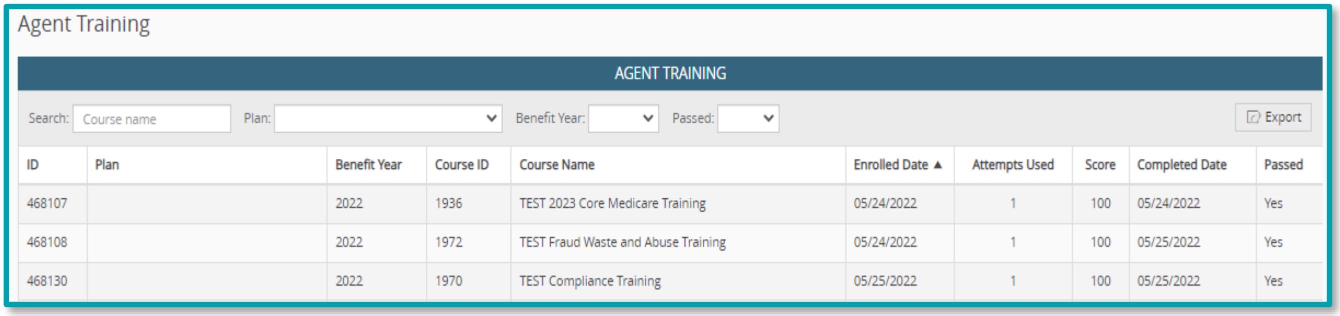


AGENT TRAINING

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

AGENT TRAINING

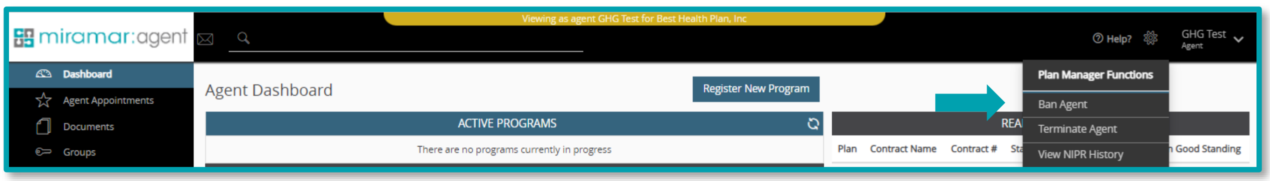
Search: Course name Plan: Benefit Year: Passed: Export

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

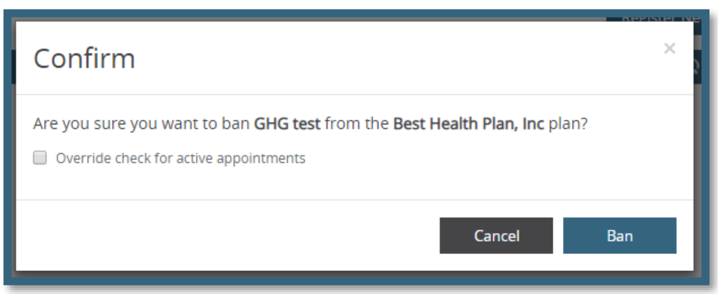
BANNING AN AGENT

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**.



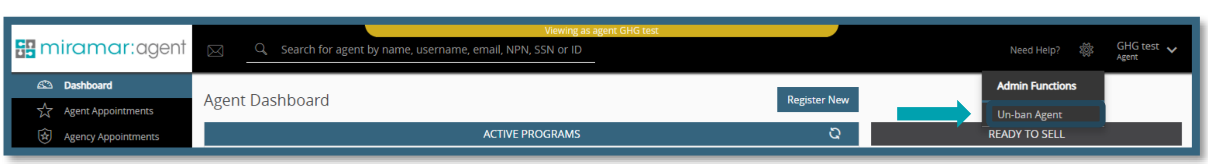
A pop-up will ask you to confirm you want to ban the agent.



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**.

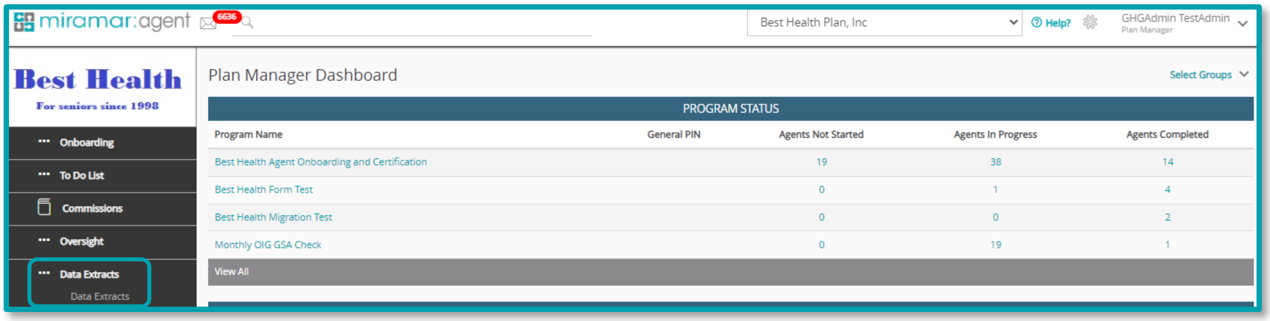


DATA EXTRACTS

convey™

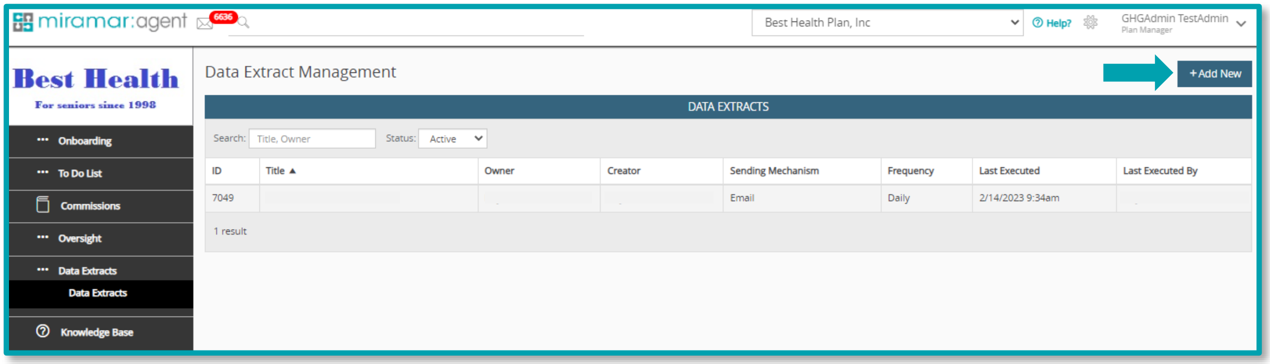
REPORT MANAGEMENT

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.

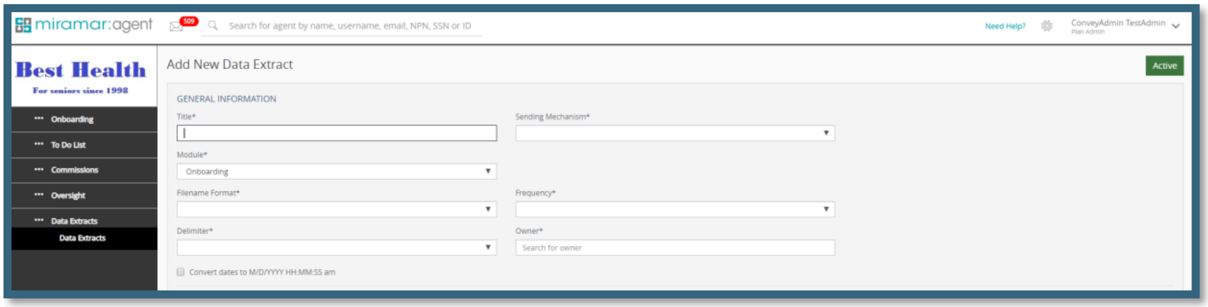


How do I create a new report?

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

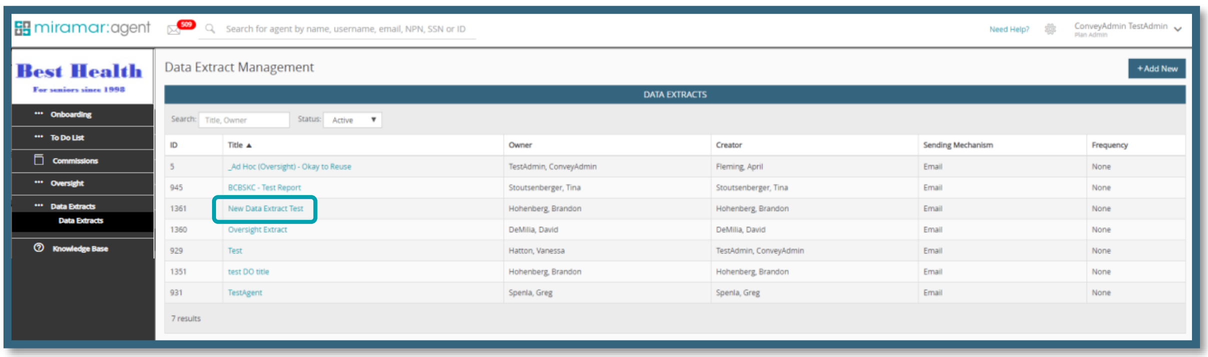


First, you will be required to fill out the information shown below. Once you have selected the delivery type and a frequency, you will be asked to add email recipients or select the FTP site from a pre-populated drop-down menu.



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.

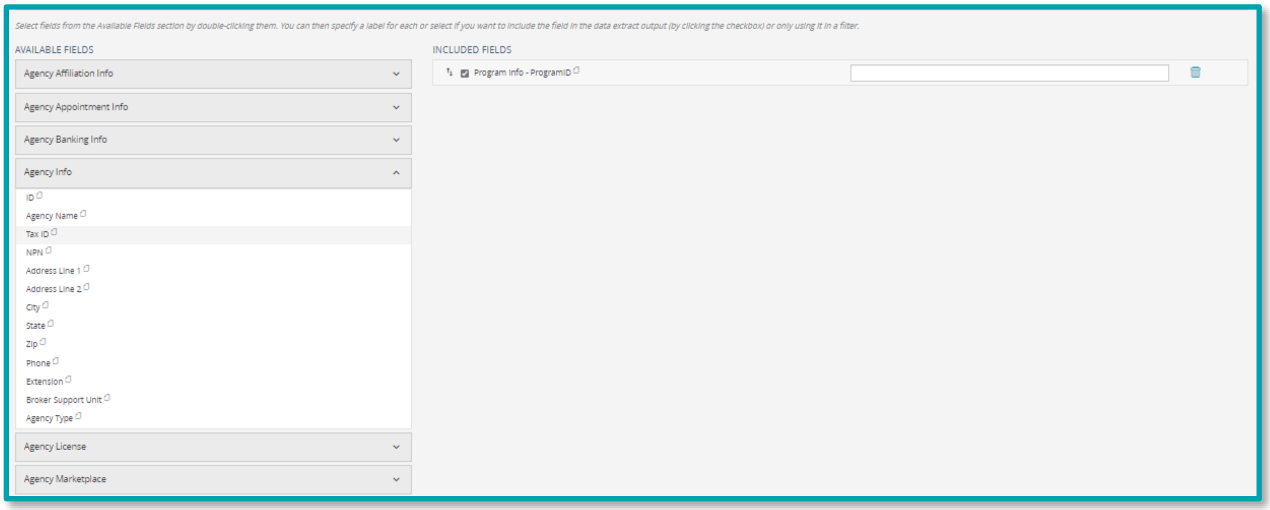


ADDING FIELDS

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.



Configurable Fields

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

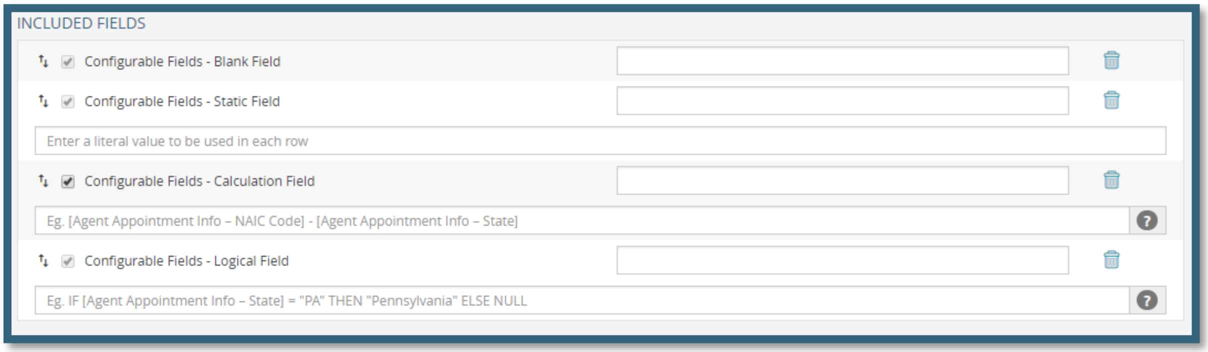
The *Blank Field* will populate no data in that column. This may be used if you are adding in additional data from other sources after running the report.

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.



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

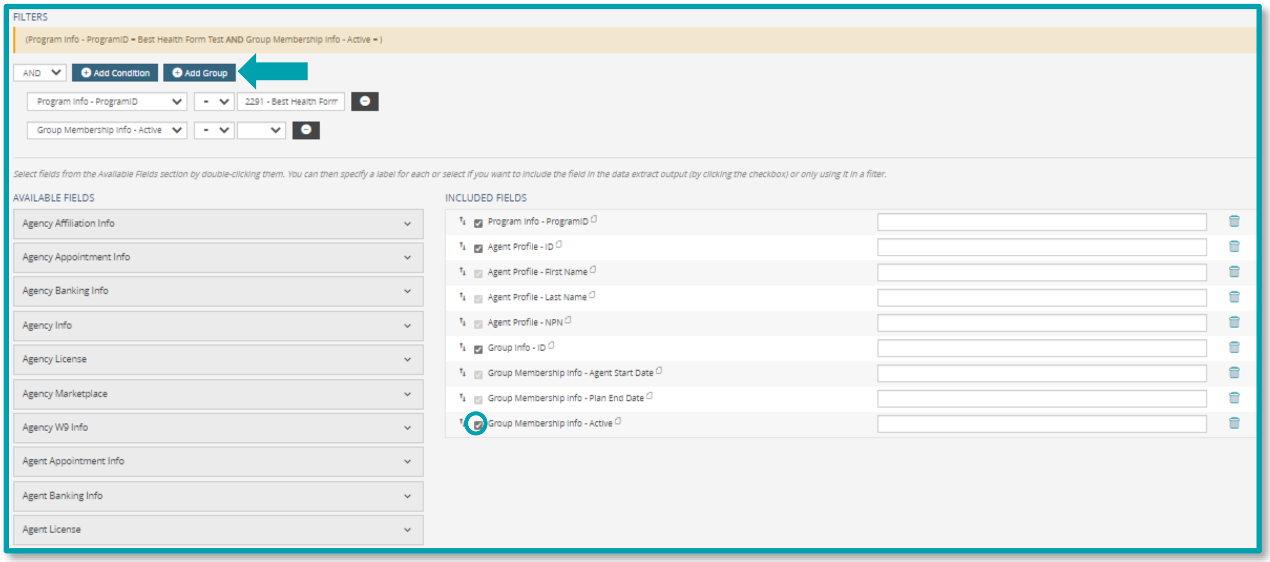
Certain fields within the data extract builder are filterable. After you have added your fields, if any are available to filter by, you will be able to select them from the filtering drop-down menu.

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.



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.

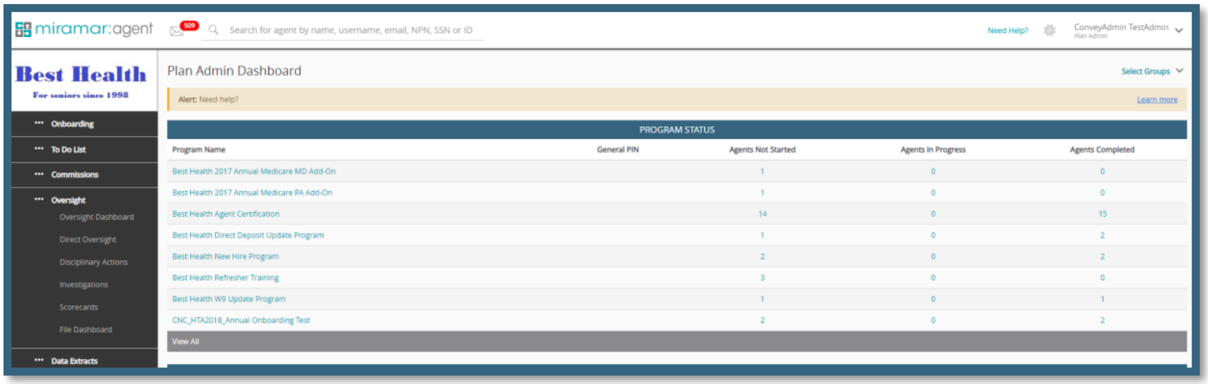
Let’s take, for example, the group of filters in the above screenshot. If we define the filters “Agent Profile – Test Users = No” and “Group Membership Info – Active = Yes” and have it defined as “And”, then we will only see agents who are not test users and have an active group.

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.*

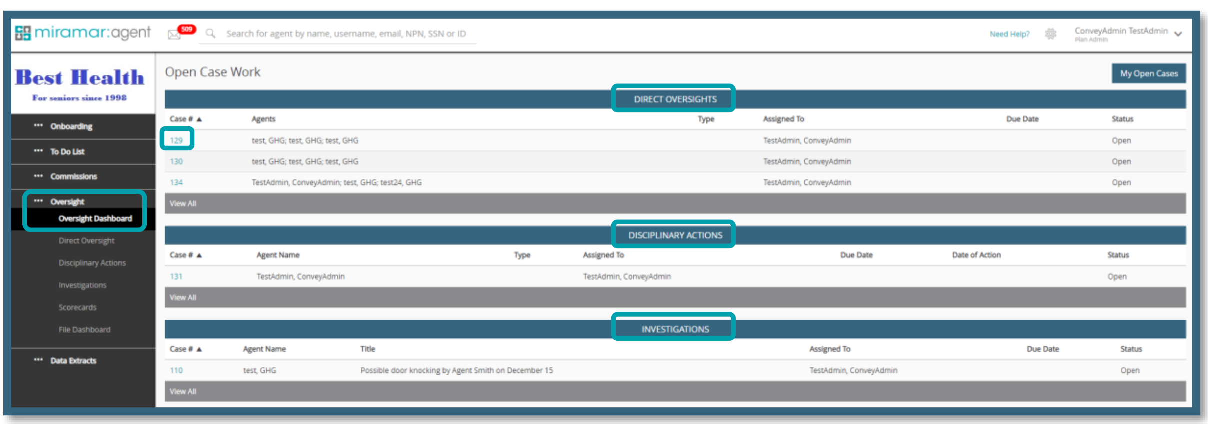


NOTE: Not all functionality may be available to all users. Individual access may be limited depending on the rights your organization has assigned each user.

OVERSIGHT DASHBOARD

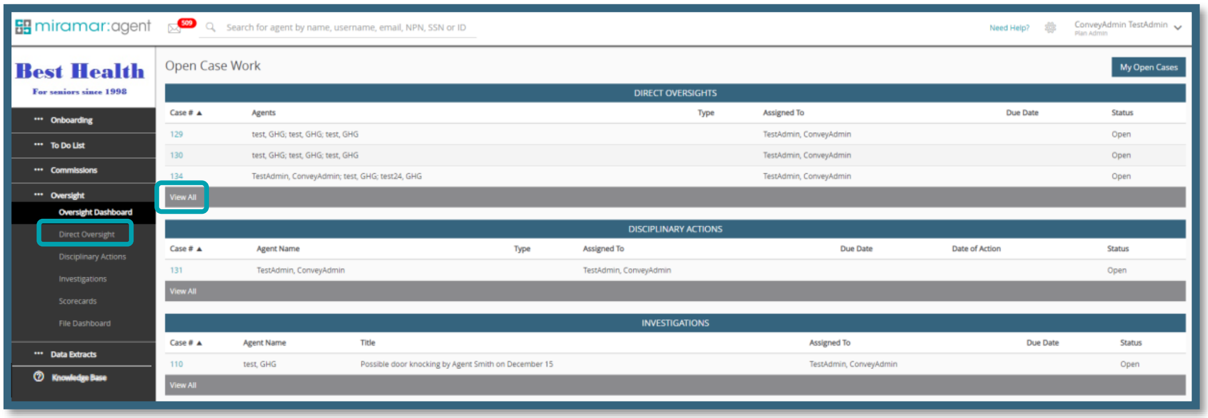
The *Oversight Dashboard* will provide a snapshot of your *Open Cases* for *Direct Oversight*, *Disciplinary Actions*, or *Investigations.*

To view all *Direct Oversights*, *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 Oversights*, *Disciplinary Actions*, or *Investigations* options may also be selected from the *Oversight Dashboard* menu to the left of the screen.



DIRECT OVERSIGHT

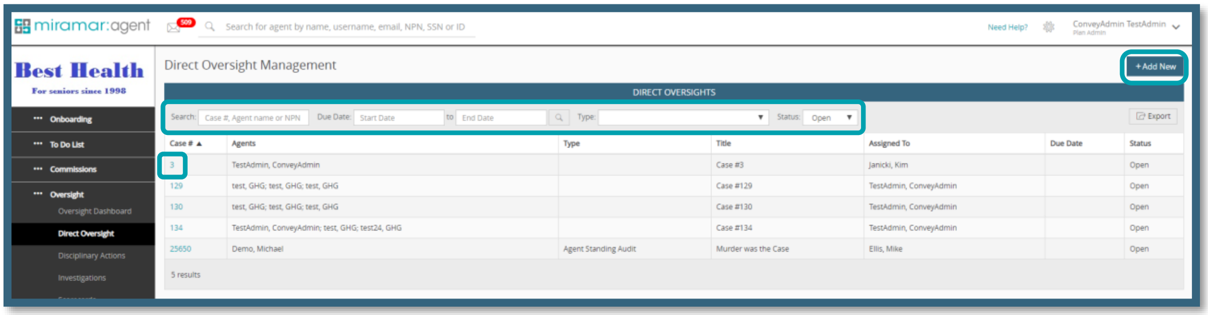
To manage Direct Oversight, proceed to the *Direct Oversight* section located on the Oversight Dashboard in the top center of the screen. Initially, the Direct Oversight will display a snapshot of your Direct Oversight cases. To see all of your Direct Oversight cases, click *View All* in the gray bar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

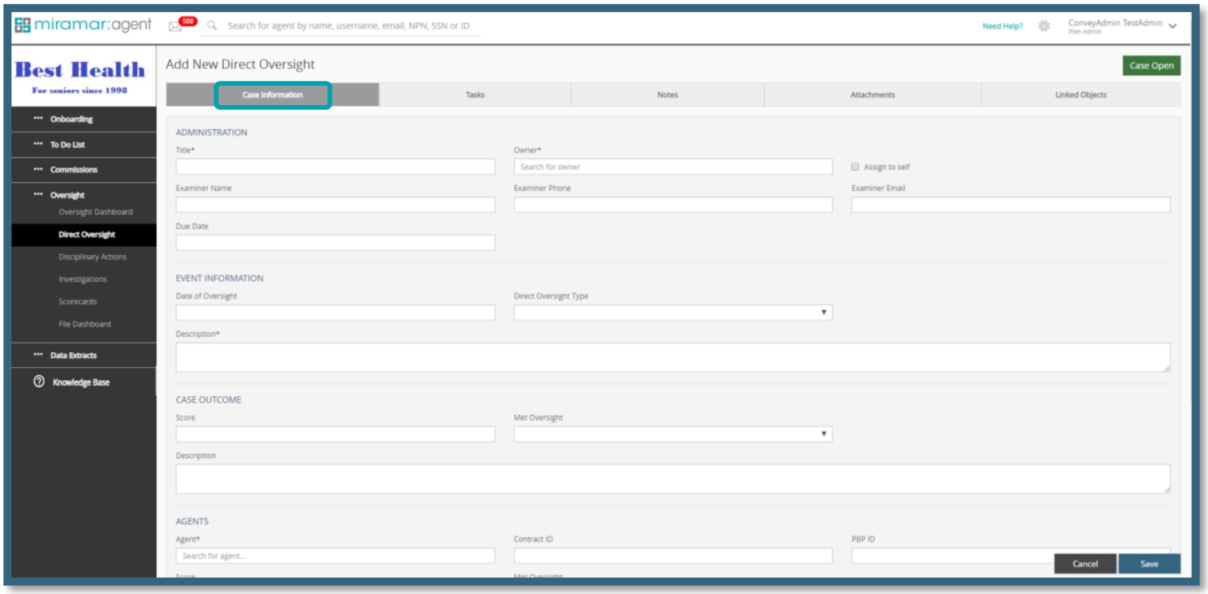


From this page, you may also add a new Direct Oversight case. To do so, click on **Add New** in the upper right corner of the screen. You will then be brought to the *Add New Direct Oversight* screen.

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.

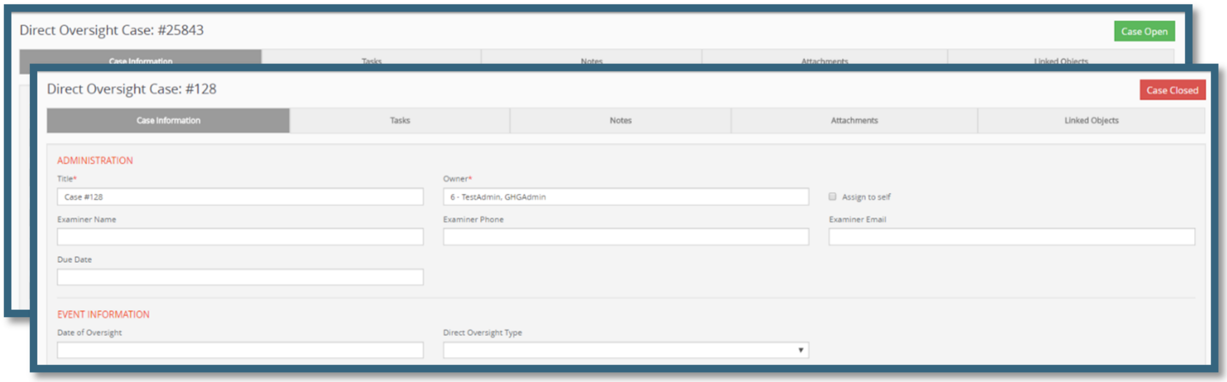
Please note the Tasks, Notes, Attachments, and Linked Objects tabs will not open until a Case # has been assigned. Once the Case Information tab has been completed and saved, you will be able to add additional information in these tabs.



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

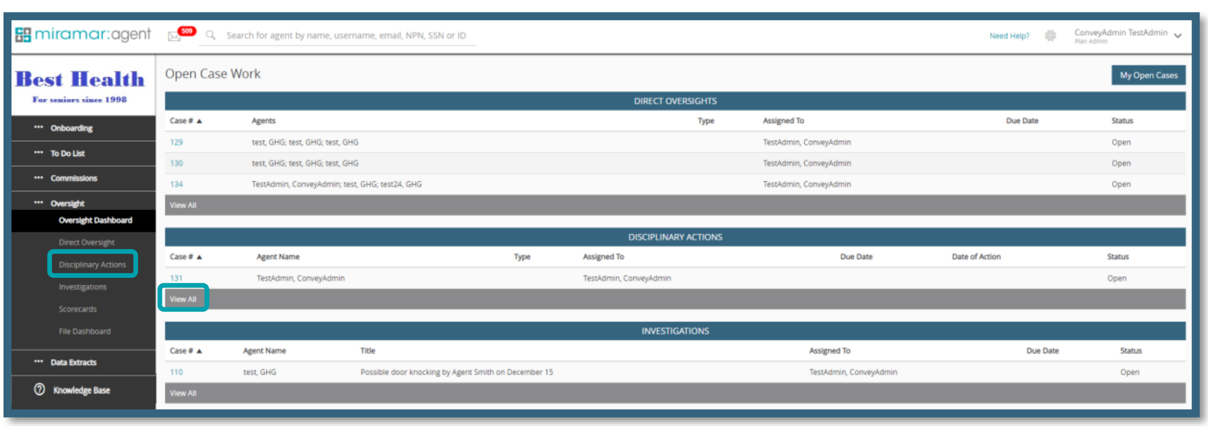
Opening/Closing Cases

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.

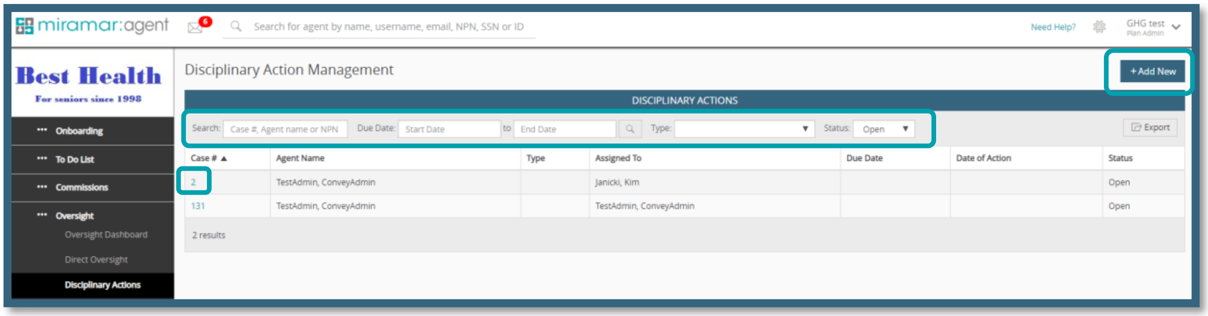


DISCIPLINARY ACTIONS

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.



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).



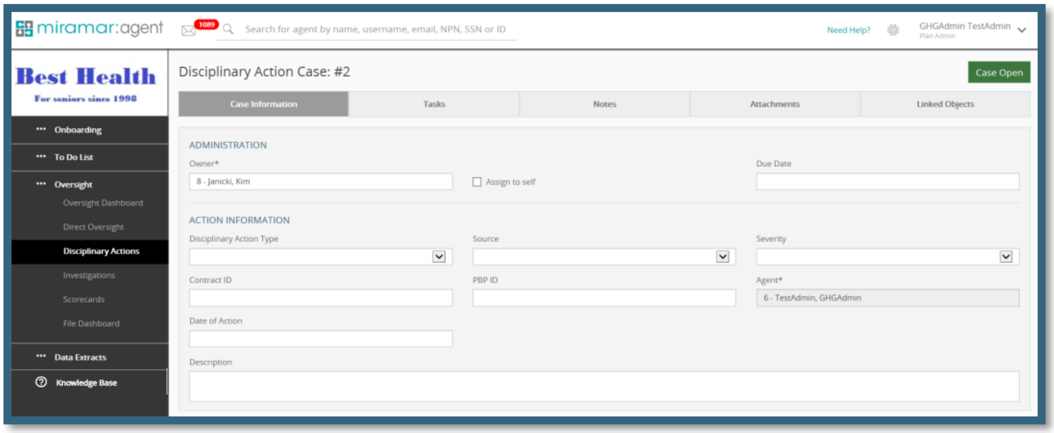
To select a specific case to review or edit, click on the *Case #* on the left side of the screen.

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

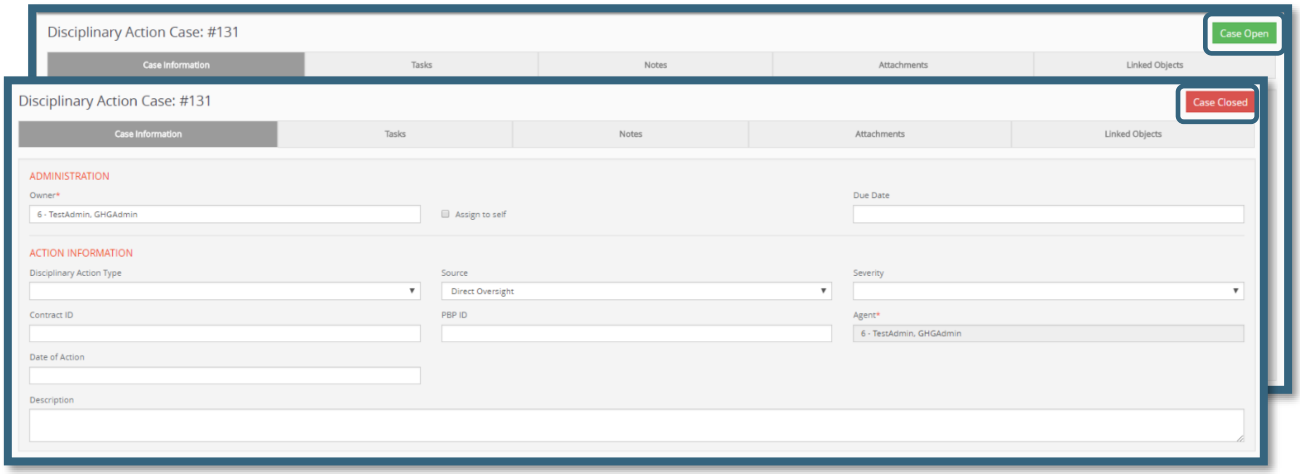
Once on the Add New Disciplinary Action screen, you will be prompted to add the details of the case. To begin, enter the details of the case in the *Case Information* tab. The *Owner* and *Agent* fields will prefill as you begin typing, and you may select from the drop-down box. Once you have completed 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

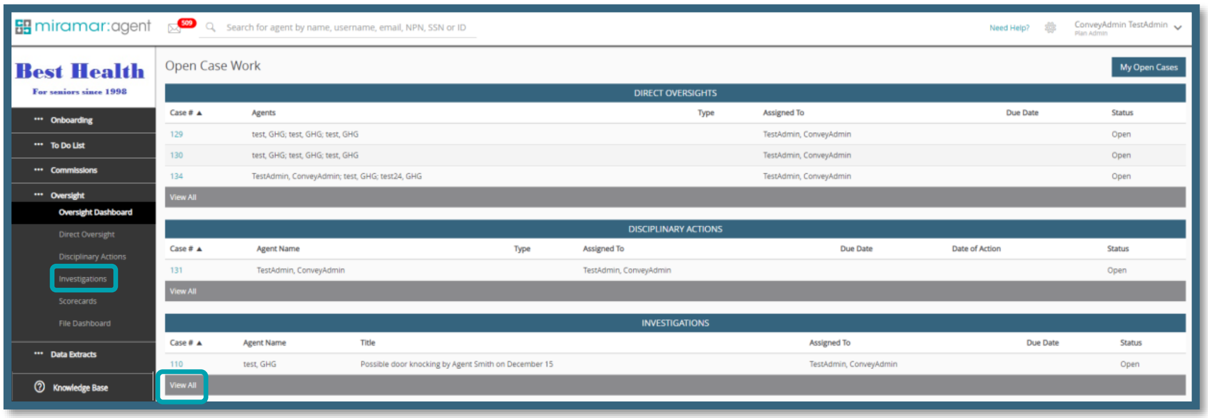
To open or close an existing case, simply click **Case Open** or **Case Closed** once in the case. The status of the case will be displayed at the top right corner.



INVESTIGATIONS

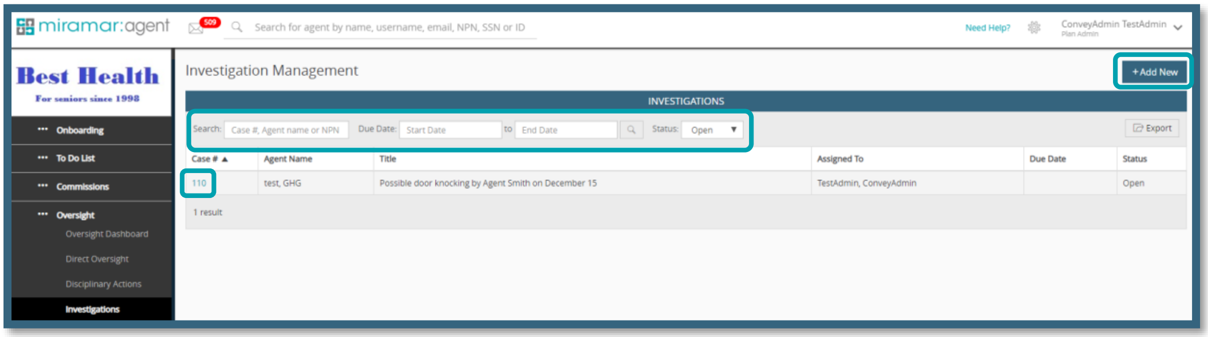
To manage *Investigations*, proceed to the *Investigations* section located on the Oversight Dashboard in the bottom center of the screen. Initially, the *Investigations* will display a snapshot of your *Investigation* cases. To see all your *Investigation* cases, click **View All** in the gray bar below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



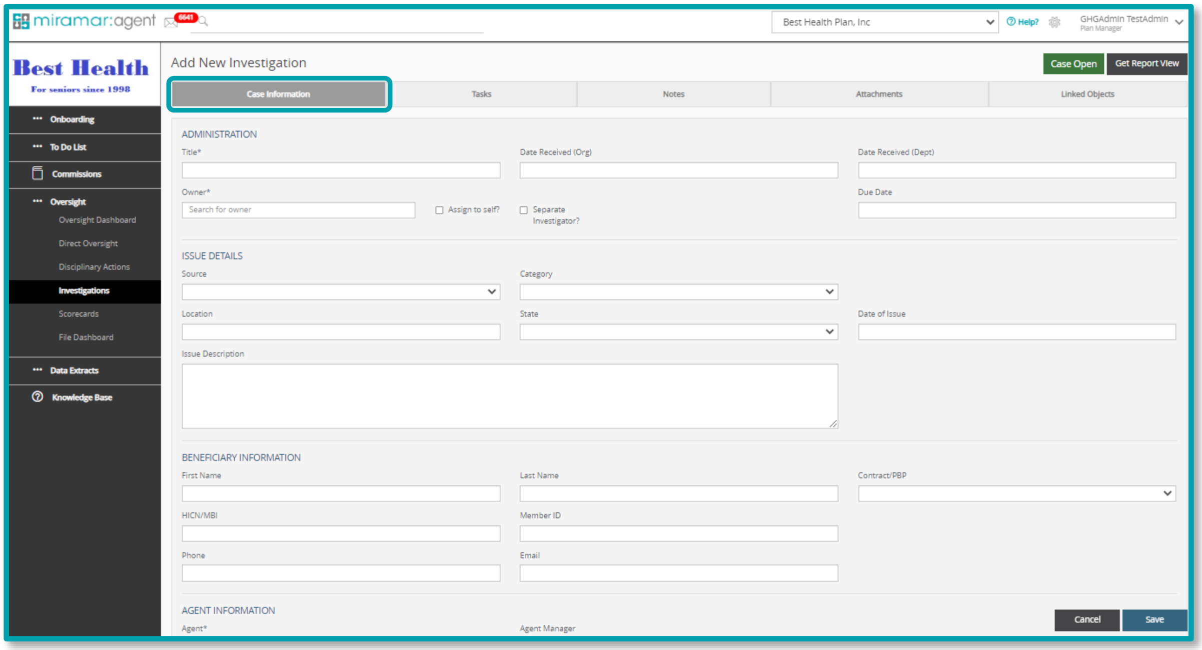
To select a specific case to review or edit, click on the *Case #* on the left side of the screen.

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

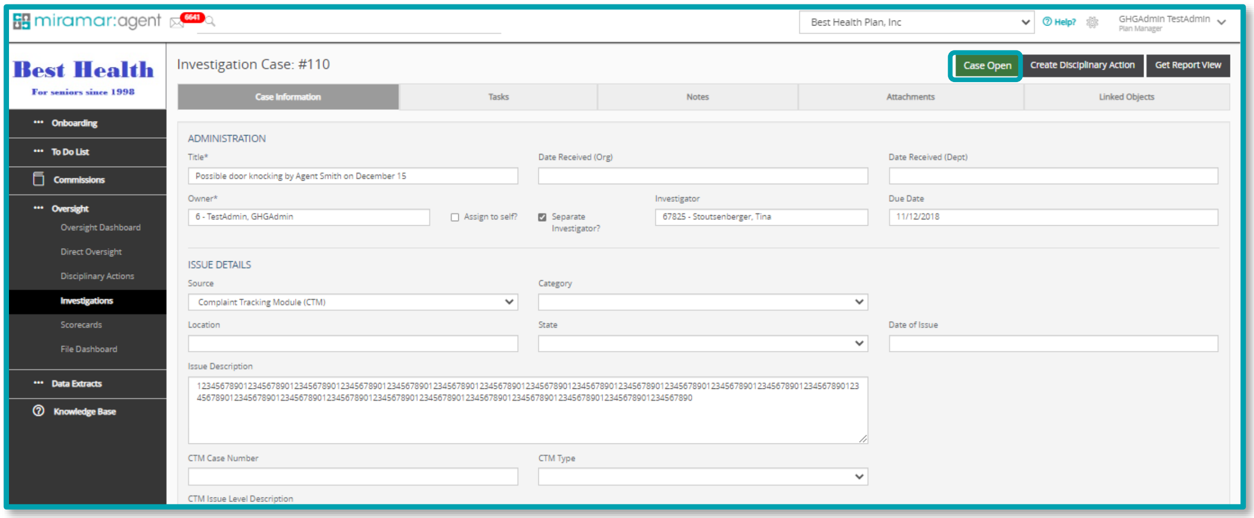
Once on the *Add New Investigation* screen, you will be prompted to add the details of the case. To begin, enter the details of the case in the *Case Information* tab. The *Owner* and *Agent* fields will prefill as you begin typing, and you may select from the drop-down box. Once you have completed the 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

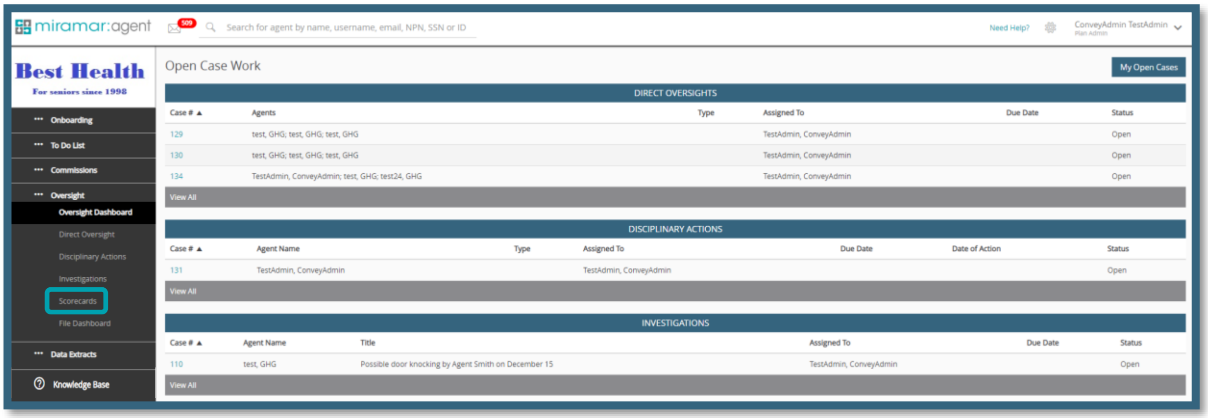
To open or close an existing case, simply click **Case Open** or **Case Closed** once in the case. The status of the case will be displayed at the top right corner.



SCORECARDS

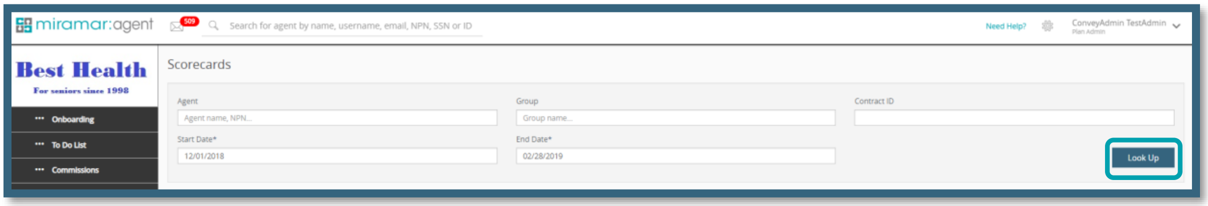
Scorecard Management

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

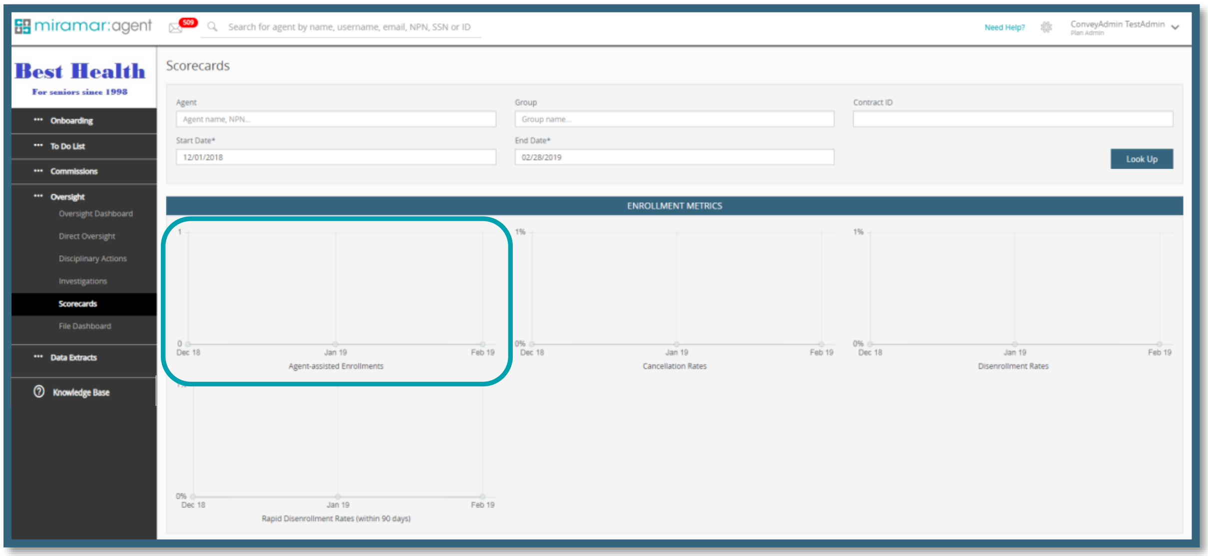


You may now search *Scorecards* by *Agent Name*, *Group Name*, and/or *Contract ID*. The *Agent* and *Group* fields will prefill as you begin typing, and you may select from the drop-down box.

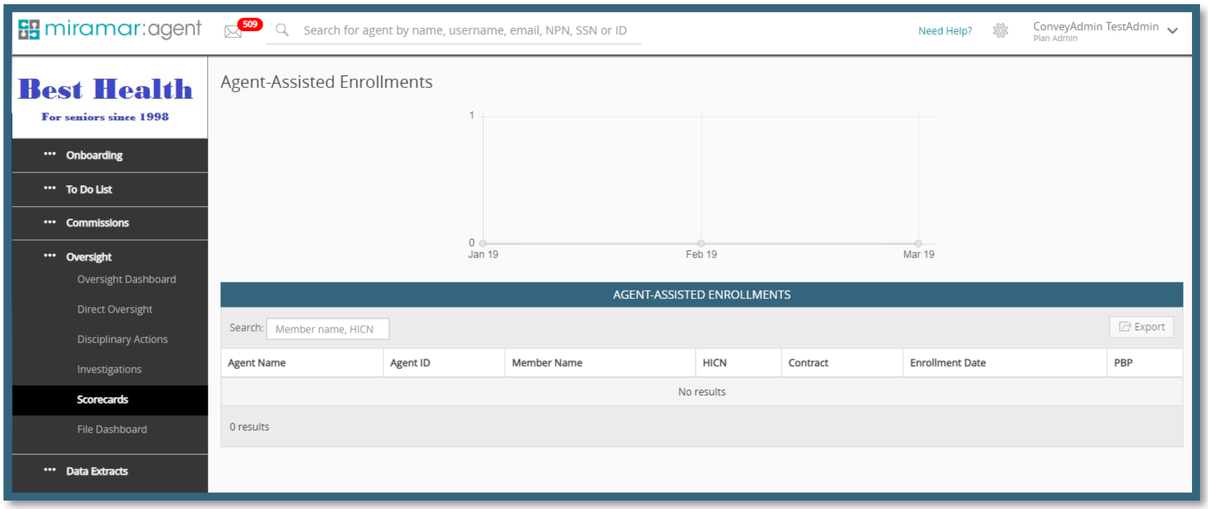
You must include a *Start Da*te and *End Date* when searching for a *Scorecard*. Once you have entered the desired information, click **Look Up** to begin your search.



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.