Miramar:Agent
Agent User Guide

Rev. 4/2023

Ft. Lauderdale, FL | Chicago, IL | Port St. Lucie, FL | Miramar, FL | Pompano Beach, FL | Lenexa, KS | Yuma, AZ | Manila, PHL

1

Table of Contents

Ft. Lauderdale, FL | Chicago, IL | Port St. Lucie, FL | Miramar, FL | Pompano Beach, FL | Lenexa, KS | Yuma, AZ | Manila, PHL

© 2020 Convey Health Solutions

2

I.   INTRODUCTION

This document is housed on the Miramar:Agent Knowledge Base for Agents (https://miramar-agent.com/KnowledgeBase/Article?kb=5).

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.

Information in this User Guide covers all agent-facing functions and features of Miramar:Agent. Your available features and services may vary.
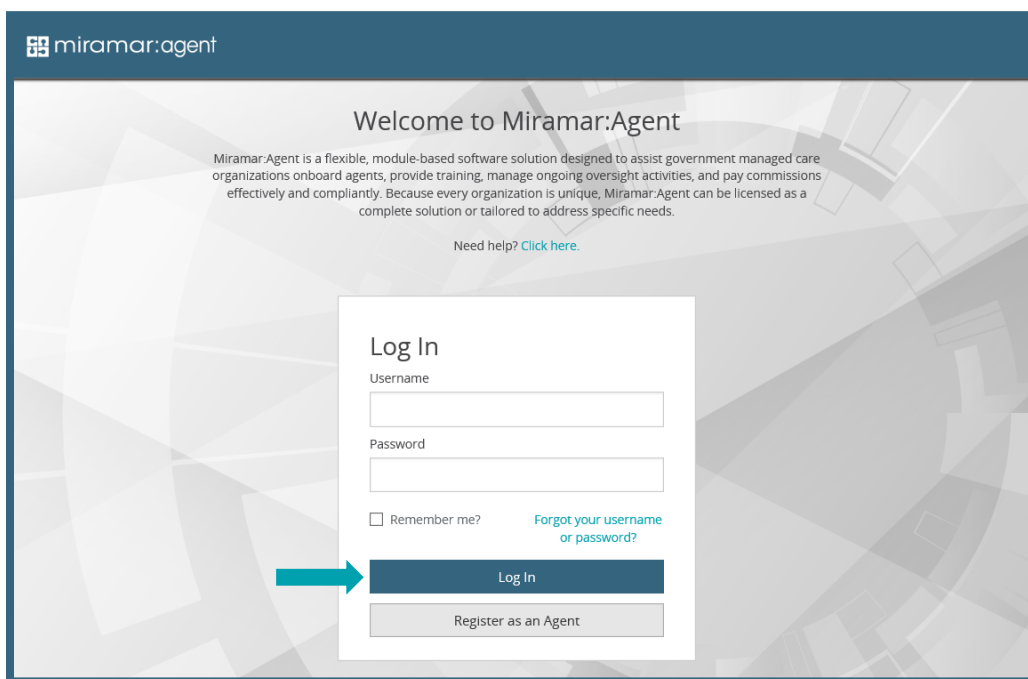
Ft. Lauderdale, FL | Chicago, IL | Port St. Lucie, FL | Miramar, FL | Pompano Beach, FL | Lenexa, KS | Yuma, AZ | Manila, PHL

© 2020 Convey Health Solutions

3

II. GETTING STARTED

ACCESSING THE SYSTEM

As a Miramar:Agent user, you will only ever need one set of login credentials from which you can access 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**.
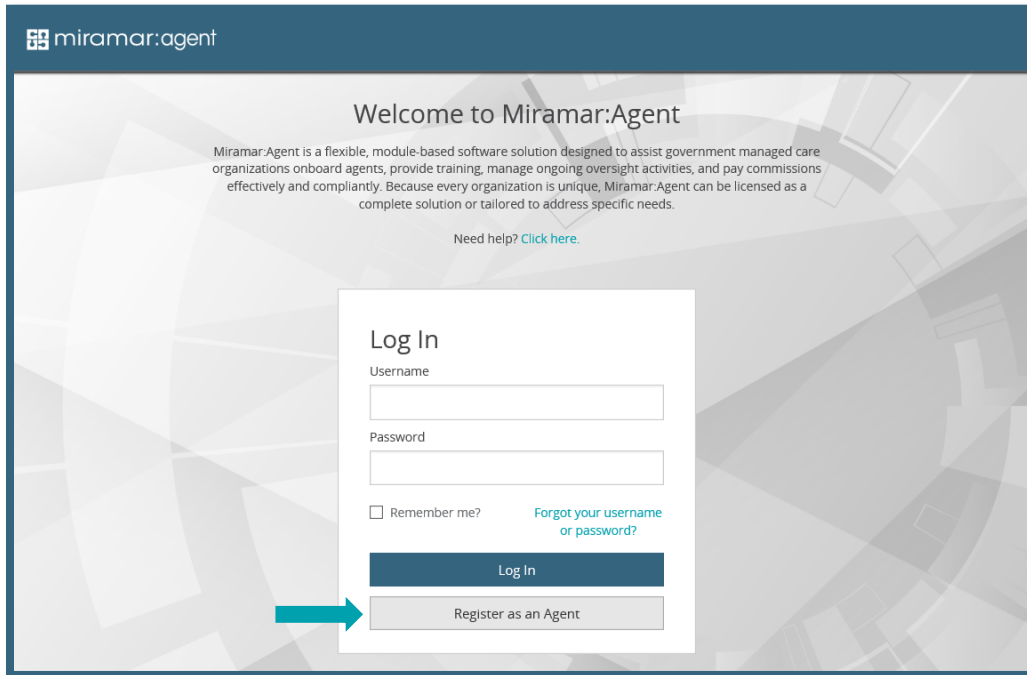
TEAM SUPPORT: Logins are NOT carrier/plan or program specific. Returning users will use their existing username and password to access any additional programs they need to complete.

Ft. Lauderdale, FL | Chicago, IL | Port St. Lucie, FL | Miramar, FL | Pompano Beach, FL | Lenexa, KS | Yuma, AZ | Manila, PHL

© 2020 Convey Health Solutions

4

How do I register as a new agent?

First-time users will need to register as an agent in the system. Click on **Register as an Agent**.
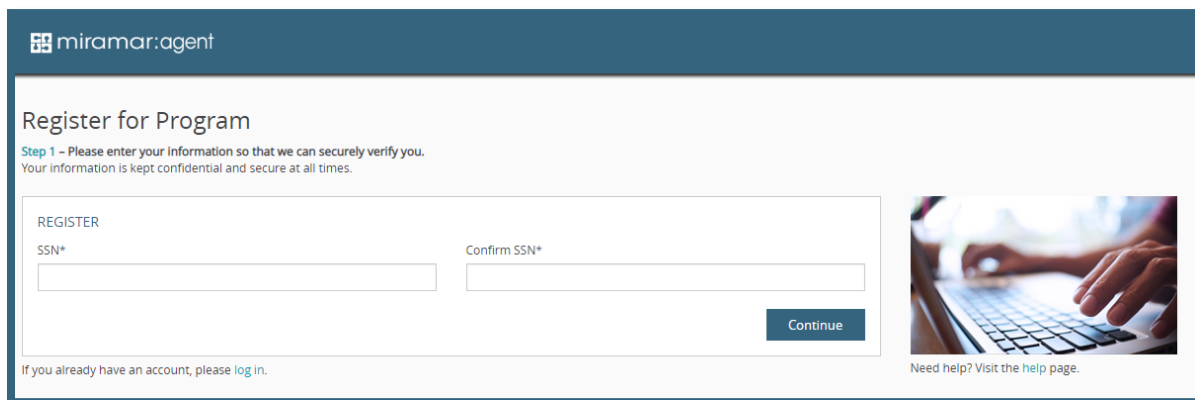
First, you will be asked to enter your Social Security Number (SSN). SSN is the unique identifier for users in the system. This step will check all existing users to verify the SSN entered does not already exist in a profile.

IMPORTANT NOTE: Failure to use a valid SSN could result in the inability to successfully complete a program, as the SSN is used for certain actions such as background checks.

Ft. Lauderdale, FL | Chicago, IL | Port St. Lucie, FL | Miramar, FL | Pompano Beach, FL | Lenexa, KS | Yuma, AZ | Manila, PHL

© 2020 Convey Health Solutions

5
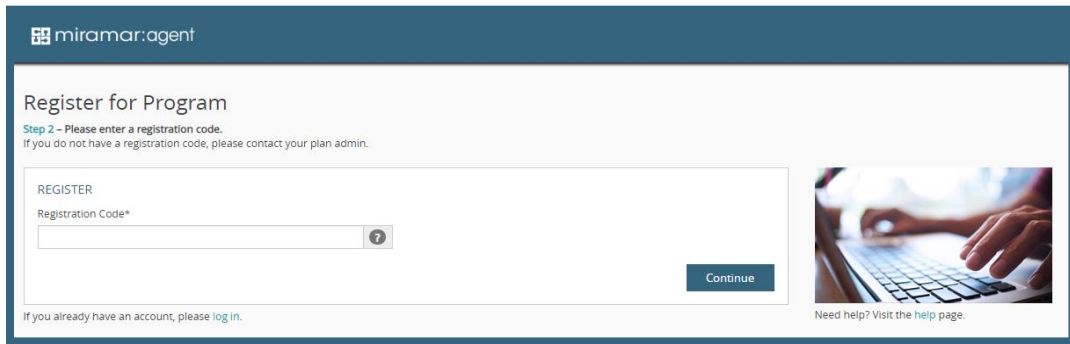
Agents who were given a Registration Code by their carrier or upline will enter the code immediately following the SSN validation. If you are not asked to enter a Registration Code, you were pre-enrolled into a program.
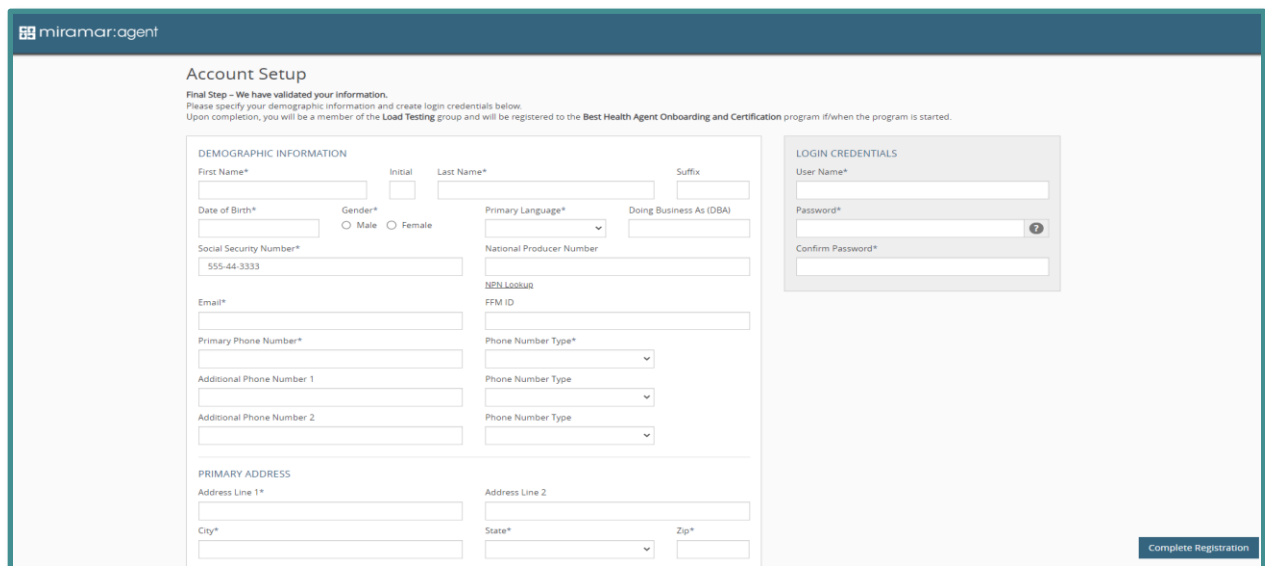

Enter your demographic information, a username and password. All fields marked with an asterisk (*) are required. Click **Complete Registration** once you have completed the form. Once you have completed registration, you will need to verify your email address prior to logging in.

IMPORTANT NOTE: For security purposes, your SSN may not be used as your username.
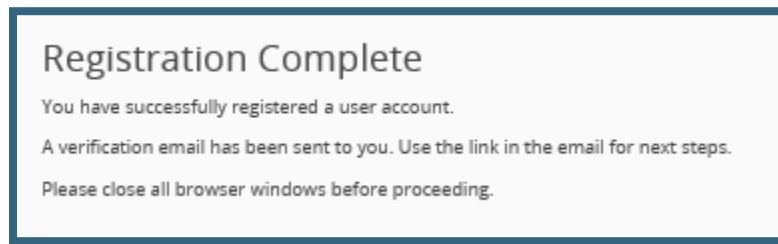
HINT: Passwords are required to contain a minimum of eight characters with at least one uppercase letter, one lowercase letter, one number, and one special character. Example: Password1#

Ft. Lauderdale, FL ǀ Chicago, IL ǀ Port St. Lucie, FL ǀ Miramar, FL ǀ Pompano Beach, FL ǀ Lenexa, KS ǀ Yuma, AZ ǀ Manila, PHL

© 2020 Convey Health Solutions

6

How do I verify my email address?

New users, and existing users who have not already done so, will need to verify their email address. Verifying an email address allows Miramar:Agent to communicate with users in the event that they forget their username or password. Upon completing registration or logging in for the first time since email verification has been required, you will see the following message.

Registration Complete

You have successfully registered a user account.

A verification email has been sent to you. Use the link in the email for next steps.

Please close all browser windows before proceeding.

IMPORTANT: Be sure to close all of your browser windows prior to opening the verification email. If you do not close your browser windows, you may receive an error message.

You will receive an email with a link to verify your email address within 30 minutes (generally this happens immediately). If you do not receive the email, please be sure to check your spam or junk folders.
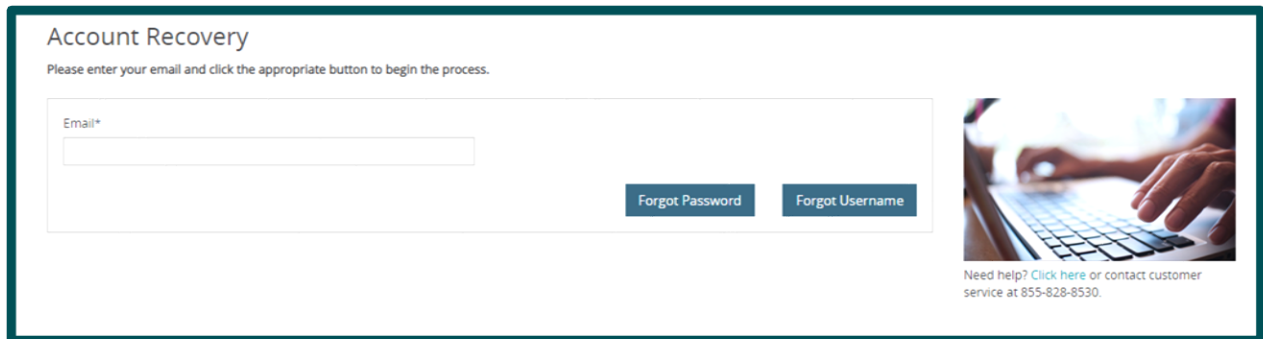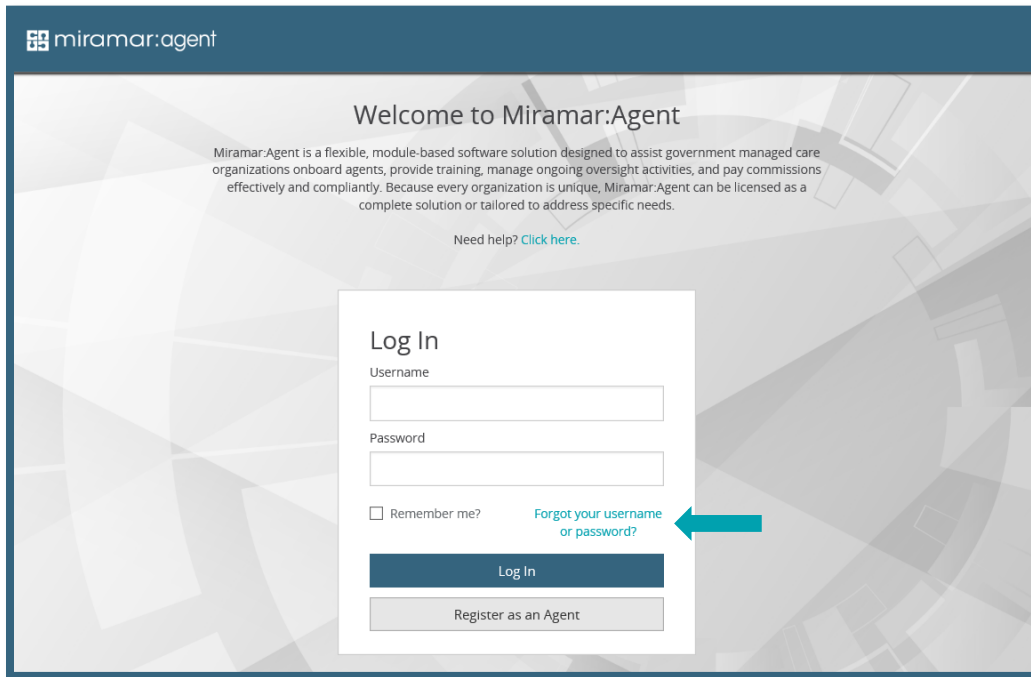
IMPORTANT: The link in the email is a one-time URL and will generally expire after 24 hours of receipt. If you received an error message after initially clicking the link, you will need to log in again to initiate a new verification email.

Once verified, click the **log in** link and you will be able to log in using your credentials on the Miramar:Agent homepage.

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. Verifying an email address allows Miramar:Agent to communicate with users in the event that they forget their username or password. 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.

Ft. Lauderdale, FL | Chicago, IL | Port St. Lucie, FL | Miramar, FL | Pompano Beach, FL | Lenexa, KS | Yuma, AZ | Manila, PHL

© 2020 Convey Health Solutions

7

IMPORTANT: If you have already verified your email address, you will receive an email with instructions for retrieving your password or username.

Forgot Username or Password

Enter your E-mail address and click **Continue**.

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.

NOTE: Passwords are required to contain a minimum of eight characters with at least one uppercase letter, one lowercase letter, one number, and one special character. Example: Password1#

Once you have successfully reset your password, click **log in** to return to the login page.
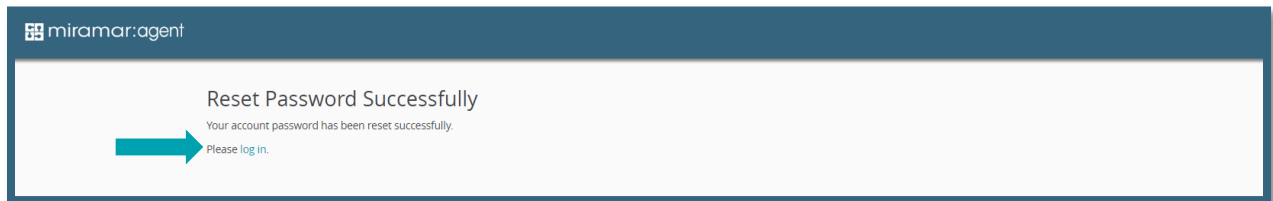
OPTIMIZING YOUR EXPERIENCE

In order to optimize your certification experience in Miramar:Agent, please ensure you are using one of our suggested browsers and have enabled pop-ups in your browser settings.

Suggested Browsers

Compatibility for Miramar:Agent is tested with the following browsers:

- Google Chrome
- Mozilla Firefox
- Microsoft Edge
- Safari

Our team uses **Microsoft Edge**. It is important you have enabled pop-ups before you access Miramar:Agent.

QUICK TIP: Restrictive security software can interfere with the ability to communicate training results to the learning management system from your browser. Click here for more information about what sites to set as secure.

- https://*.teamsupport.com
- https://*miramar-agent.com
- https://lms.gormanhealthgroup.com

Enabling Pop-Ups

It is important you have enabled pop-ups before you access Miramar:Agent, as trainings will pop up in a second tab or window.

Ft. Lauderdale, FL | Chicago, IL | Port St. Lucie, FL | Miramar, FL | Pompano Beach, FL | Lenexa, KS | Yuma, AZ | Manila, PHL

© 2020 Convey Health Solutions

9

TEAM SUPPORT: Click here for more information on how to enable pop-ups in FireFox, Google, and Chrome.

Ft. Lauderdale, FL | Chicago, IL | Port St. Lucie, FL | Miramar, FL | Pompano Beach, FL | Lenexa, KS | Yuma, AZ | Manila, PHL
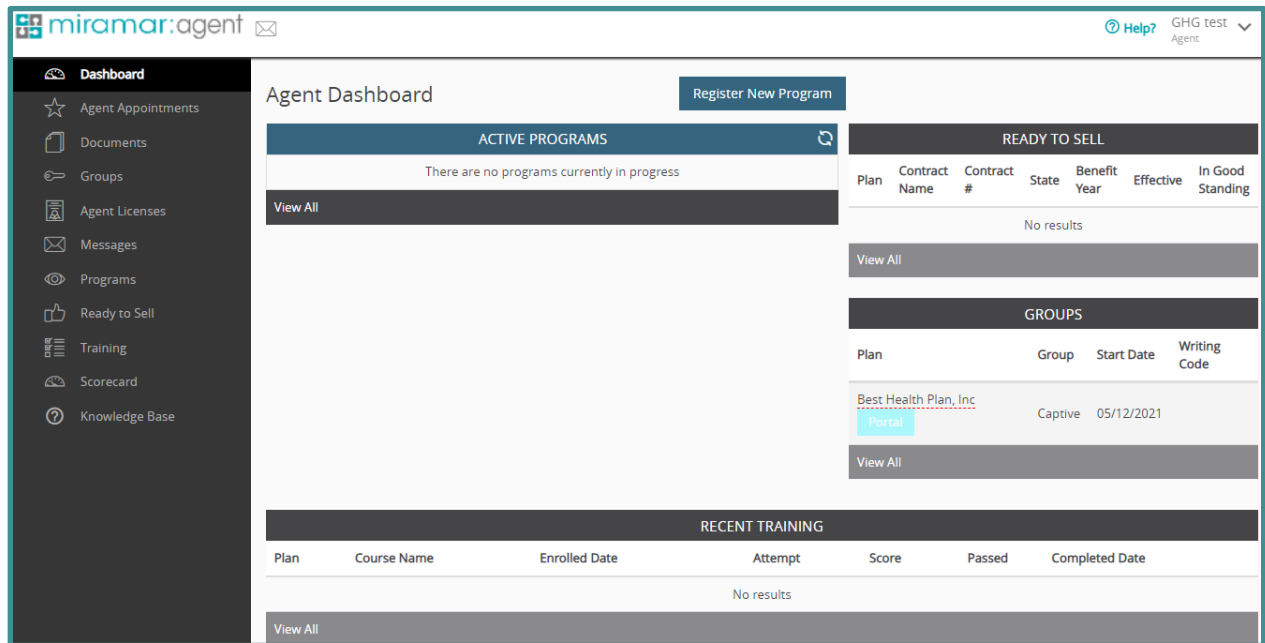
© 2020 Convey Health Solutions

10

III.   AGENT DASHBOARD

The Agent Dashboard is the hub of Miramar:Agent while also providing a snapshot of your current activity in the system. On your dashboard, you will see widgets for the following current information:

- Active programs
- Ready to sell information (current and previous benefit years)
- Group affiliations
- Recent training information

To view the full index of any of the dashboard widgets, click **View All**. From the individual index, you will be able to search and filter the available information.

From the dashboard, you can action any active program steps, edit your profile information, and access any of the tabs from your left side navigation menu.
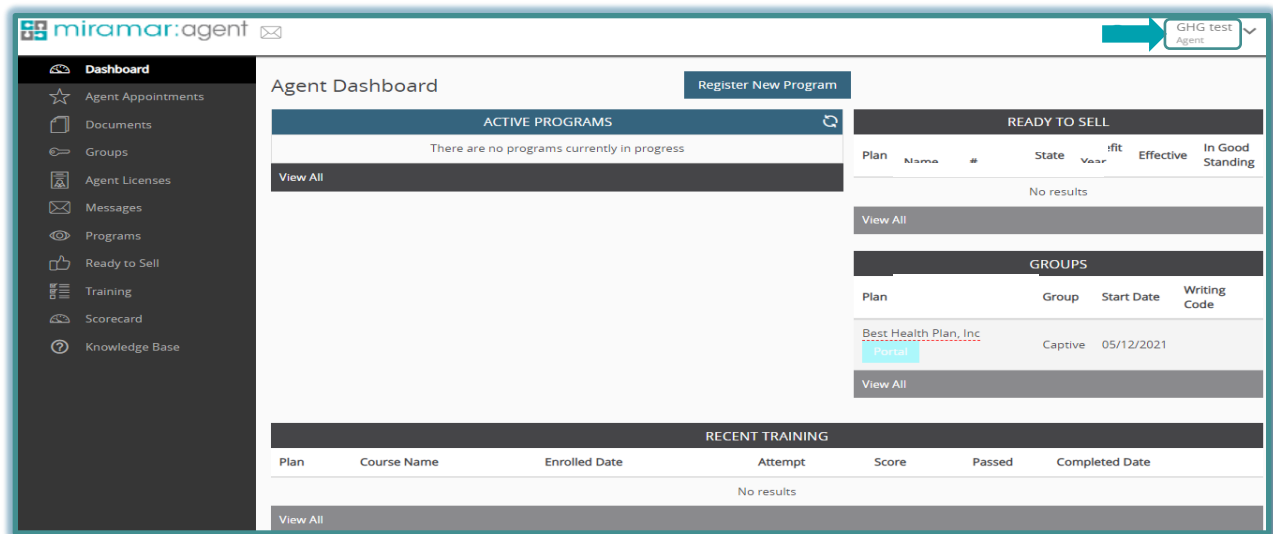

Ft. Lauderdale, FL | Chicago, IL | Port St. Lucie, FL | Miramar, FL | Pompano Beach, FL | Lenexa, KS | Yuma, AZ | Manila, PHL

© 2020 Convey Health Solutions

11

PROFILE MANAGEMENT

How do I update my profile information?

You can update your profile demographic information, change your account password, and answer 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**.
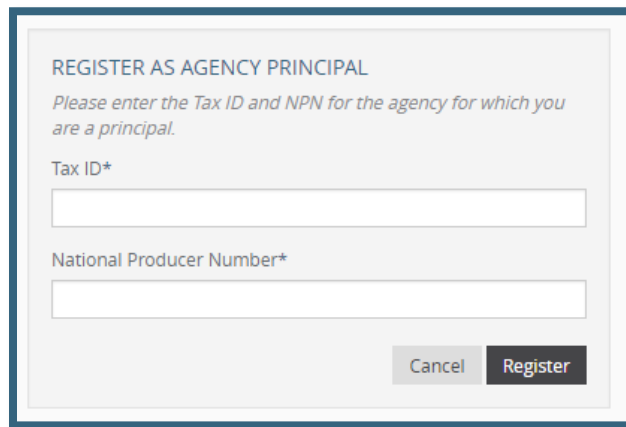

Once you've made the desired changes to your profile, be sure to click **Save** at the bottom of the screen before you leave the page.

Ft. Lauderdale, FL | Chicago, IL | Port St. Lucie, FL | Miramar, FL | Pompano Beach, FL | Lenexa, KS | Yuma, AZ | Manila, PHL

© 2020 Convey Health Solutions

12

How do I register as the principal of an agency?

If you are an agency principal, you must register as an individual before you will be allowed to register as the principal of an agency. Once you have completed your individual profile, proceed to the *My Profile* page and click **Principal for an agency?**

Ft. Lauderdale, FL | Chicago, IL | Port St. Lucie, FL | Miramar, FL | Pompano Beach, FL | Lenexa, KS | Yuma, AZ | Manila, PHL

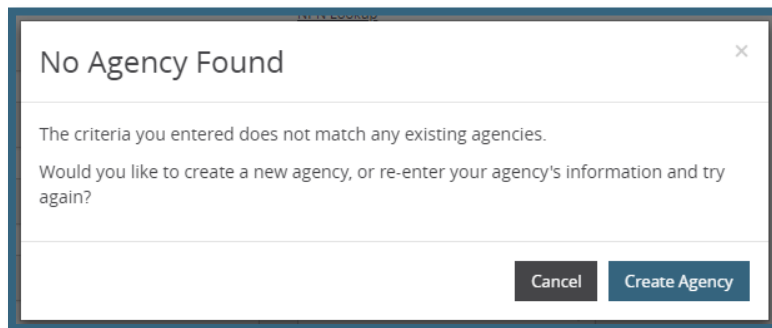*© 2020 Convey Health Solutions*

13

Enter the required agency information (Tax ID and National Producer Number (NPN)). Click **Register**.

IMPORTANT NOTE: You must provide the *agency* NPN and *agency* Federal Employer Identification Number (FEIN). Both are validated during the initial license check. If they do not match the values provided by the National Producer Insurance Registry (NIPR), no data will be imported, and you will not be able to proceed in your program without intervention.
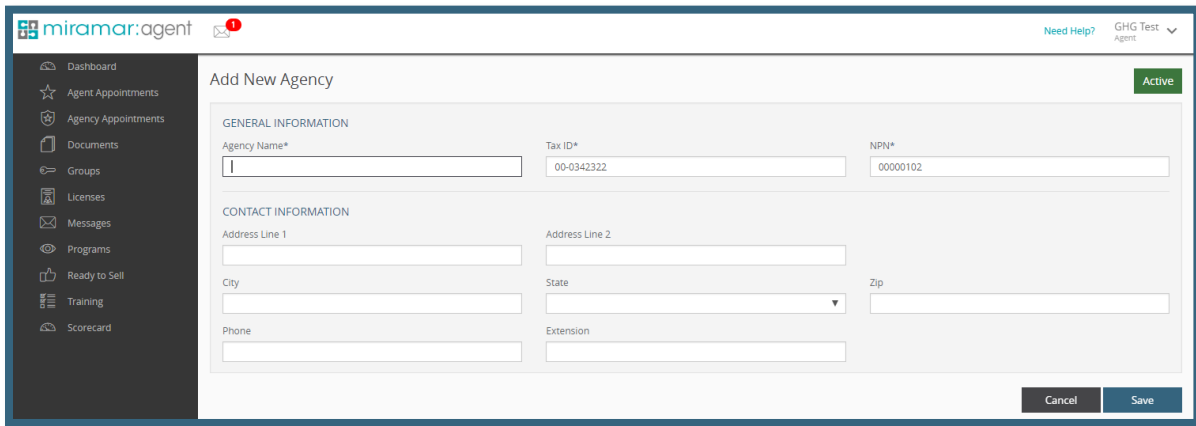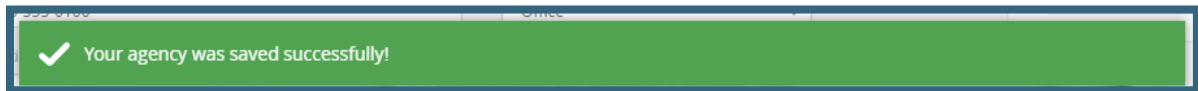

New agency in Miramar:Agent

If the agency does not already exist in Miramar:Agent, a new agency will need to be created. Click **Create Agency**.

You will be prompted to fill in the name of the agency as well as option contact information. Click **Save** once you have completed the required fields.
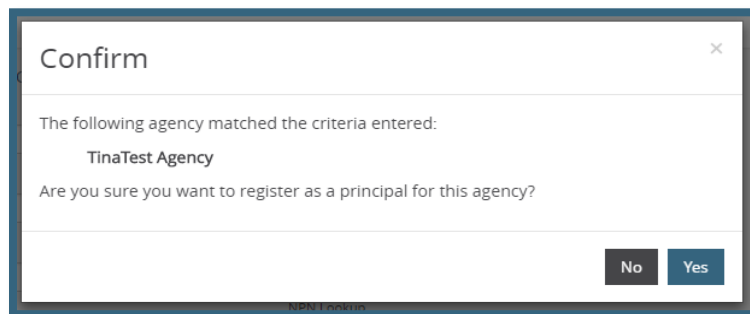
Once the agency has successfully saved, you will see the message below at the bottom of your screen.
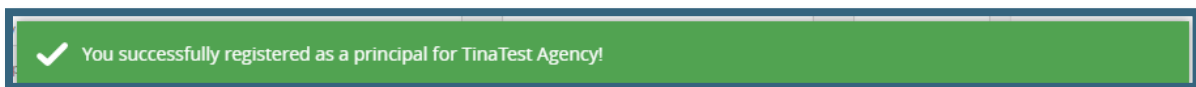

✔ Your agency was saved successfully!

Existing agency in Miramar:Agent

If the agency has already been established in Miramar:Agent, you will see the confirmation pop-up below. Once you have confirmed the name showing on the form matches the agency you are attempting to register, click **Yes**.
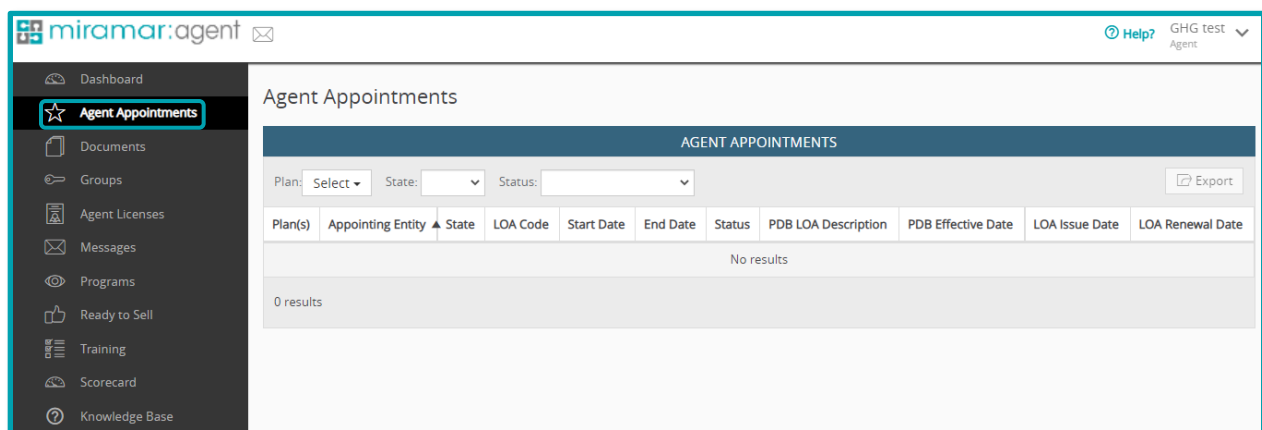

Confirm   ×

The following agency matched the criteria entered:

TinaTest Agency

Are you sure you want to register as a principal for this agency?

No   Yes

Once you have confirmed, you will see the message below at the bottom of your screen.

✔ You successfully registered as a principal for TinaTest Agency!

AGENT APPOINTMENTS

To view your agent appointments, click **Agent Appointments** in the Dashboard menu to the left of the screen. This will provide a snapshot of your appointments. To see all of your appointments, click **View All** in the gray bar below the displayed appointments.
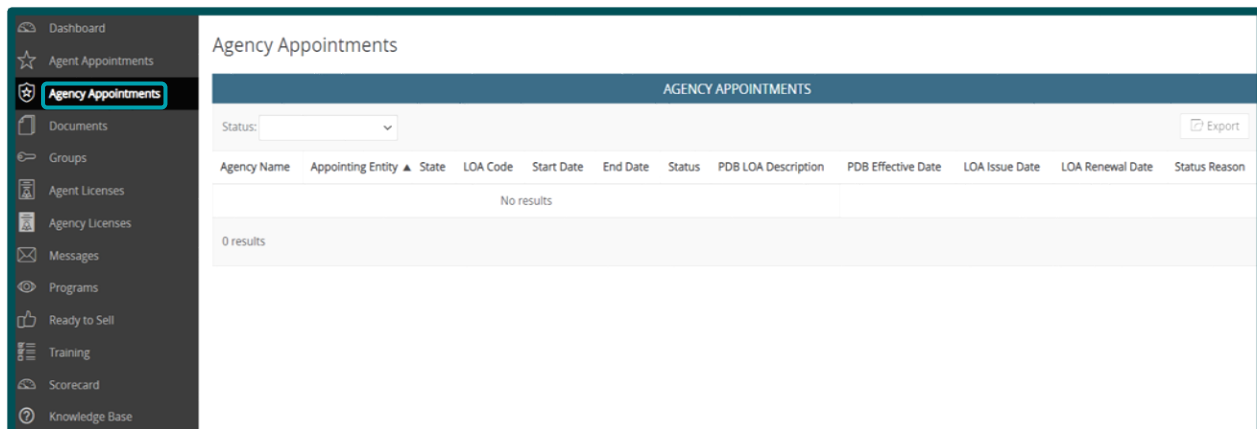
IMPORTANT NOTE: Appointment information is refreshed on a daily basis from NIPR.

AGENCY APPOINTMENTS

If you are registered as a principal of an agency and have gone through an agency program that included a license check step, you will be able to view any appointments associated with that agency. Click **Agency Appointments** in the Dashboard menu to the left of the screen to view your agency appointments.
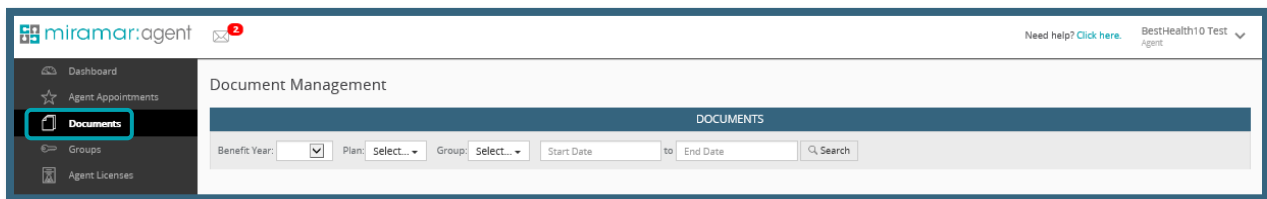
DOCUMENTS

Documents can include training certificates, completed forms, uploaded E&O, or any other documents your plan saved during your program completion or requested to be uploaded. To view your uploaded and saved documents, click into [Documents] in the Dashboard menu to the left of the screen.

Upon initially clicking into the Documents section, you will not see any documents available. To view all available documents, click **Search**. You can also search by various fields, including Benefit Year, Plan, Group, and date.

To view a document, click into the Document ID. You can also check off multiple documents to export at one time, by clicking **Export** in the top right corner.

NOTE: If a document requires review, you will see an icon next to the document title indicating its status. A green checkmark (✓), a red (**X**) indicates that it has been denied, and not yet reviewed will show no icon. If a document is denied users will receive a reason in refeence to the denial in order to prompt them on what may need to be updated. You can hover over the icon to view the status description.
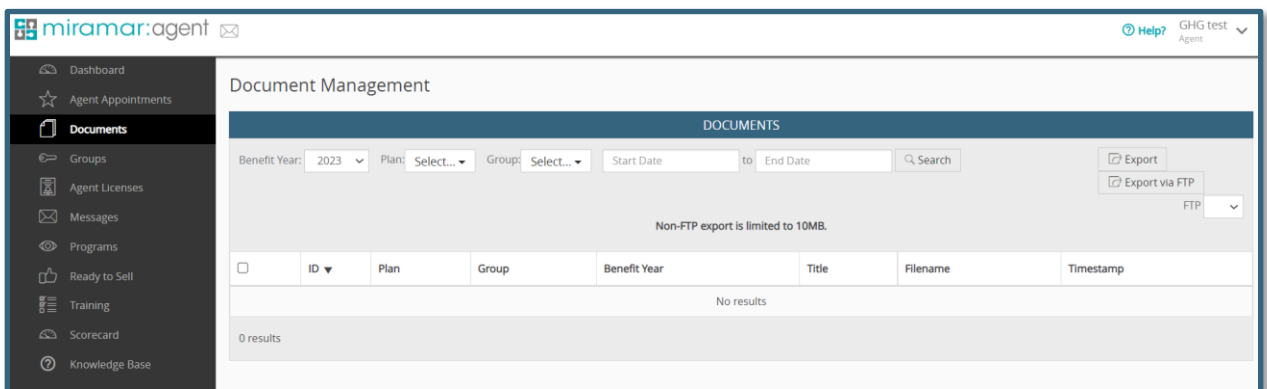
How do I upload a certificate or document?

Document uploads generally take place within programs. Programs will prompt agents to upload documents as needed for verification within the program.
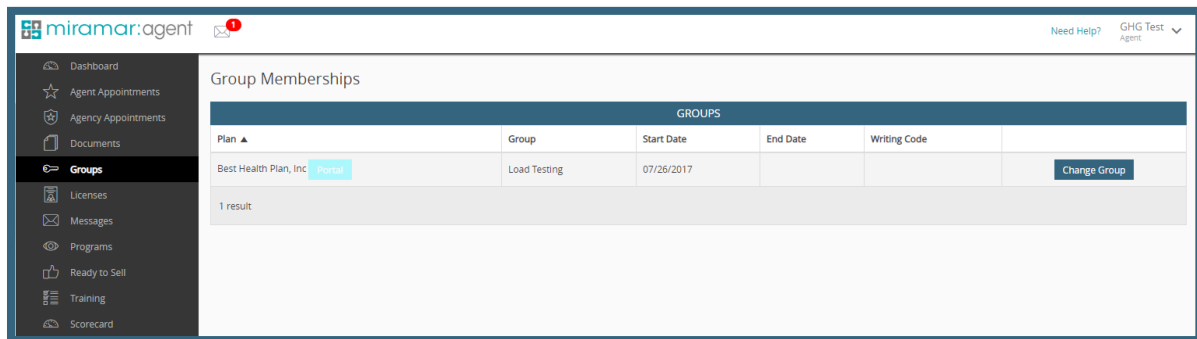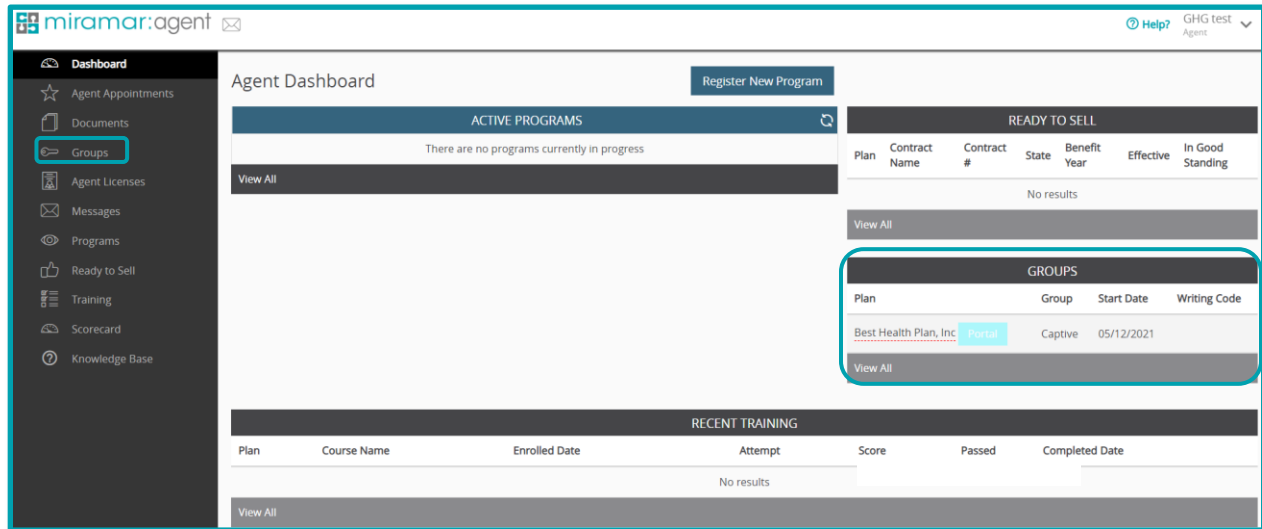
IMPORTANT NOTE: Documents you upload in a program are stored to a system that does not accept the below characters. If your file has one of these characters, rename before uploading. If your document has an extremely long name, you may also want to shorten it, as very long file paths may result in errors.

- Tilde (~)
- Number sign (#)
- Percent (%)
- Ampersand (&)
- Apostrophe (')
- Plus sign (+)

- Quotation mark (")
- Braces ({ })
- Backslash (\)

GROUPS

Groups are used to categorize agents under different Plans. Groups are important because they can help determine different pathways in a plan's onboarding programs. Every agent associated with a Plan must belong to a group. Agents can be a part of more than one group.

To view a full history of your group affiliations for your plans, click **Groups** in the Dashboard menu to the left of the screen. The widget on your Dashboard will provide a snapshot of the groups with which you are currently associated.

Ft. Lauderdale, FL | Chicago, IL | Port St. Lucie, FL | Miramar, FL | Pompano Beach, FL | Lenexa, KS | Yuma, AZ | Manila, PHL

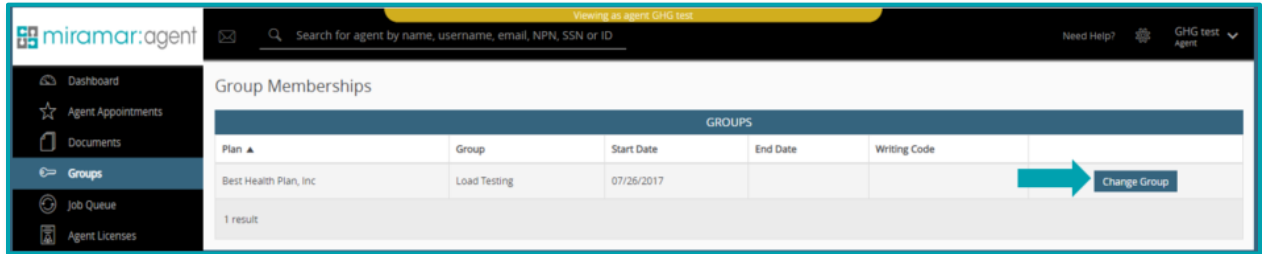© 2020 Convey Health Solutions

18

How do I request a group change?

If the group listed for a plan is incorrect and you want to request a group change, you will need to get the Group Code from a plan administrator. Please reach out to your plan and not Miramar:Agent support as the plan has to approve this change.
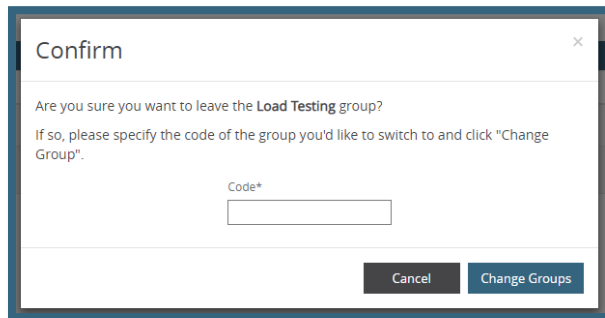
NOTE: The group code is NOT the same as a program registration PIN code. A PIN code is associated with a particular program and group, but a group code can be used to request a group change at any time and is static for that group.

Once you have the Group Code, click **Change Group** next to the group you wish to update.

Ft. Lauderdale, FL | Chicago, IL | Port St. Lucie, FL | Miramar, FL | Pompano Beach, FL | Lenexa, KS | Yuma, AZ | Manila, PHL

© 2020 Convey Health Solutions

19

Once you have clicked Change Group, a confirmation box will pop up on the screen, and you will be required to enter the Group Code. Click **Change Groups** to finalize the request. A green confirmation banner will appear at the bottom of your screen once you have completed the request.

IMPORTANT NOTE: Your request will be sent to a Plan Administrator to process. The group change will only be finalized once the Plan Administrator has approved the request.

Ft. Lauderdale, FL | Chicago, IL | Port St. Lucie, FL | Miramar, FL | Pompano Beach, FL | Lenexa, KS | Yuma, AZ | Manila, PHL
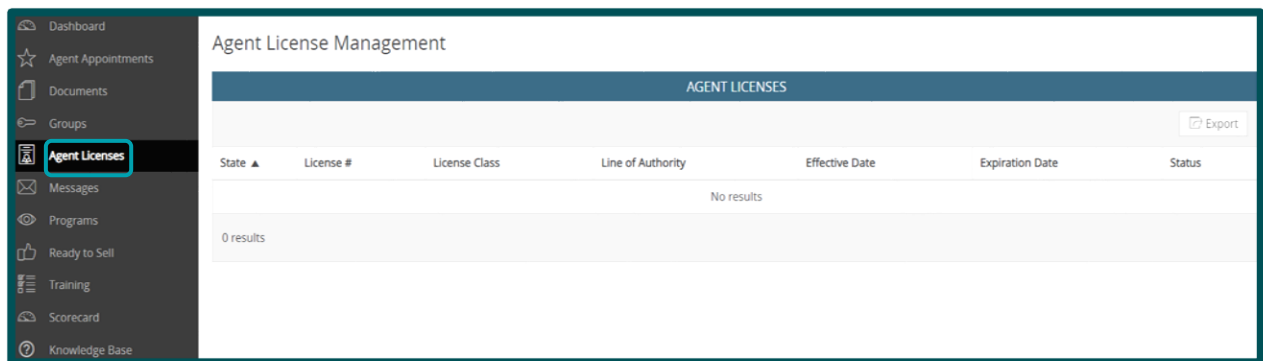
© 2020 Convey Health Solutions

20

LICENSES

To view your licenses, click **Agent Licenses** in the Dashboard menu to the left of the screen.

IMPORTANT NOTE: License information is refreshed on a daily basis from NIPR.

You may utilize this index to monitor your licenses and track licenses with upcoming expiration dates. Licenses will show one of the following three statuses:

- Active
- Due Soon
- Expired

Ft. Lauderdale, FL | Chicago, IL | Port St. Lucie, FL | Miramar, FL | Pompano Beach, FL | Lenexa, KS | Yuma, AZ | Manila, PHL

© 2020 Convey Health Solutions
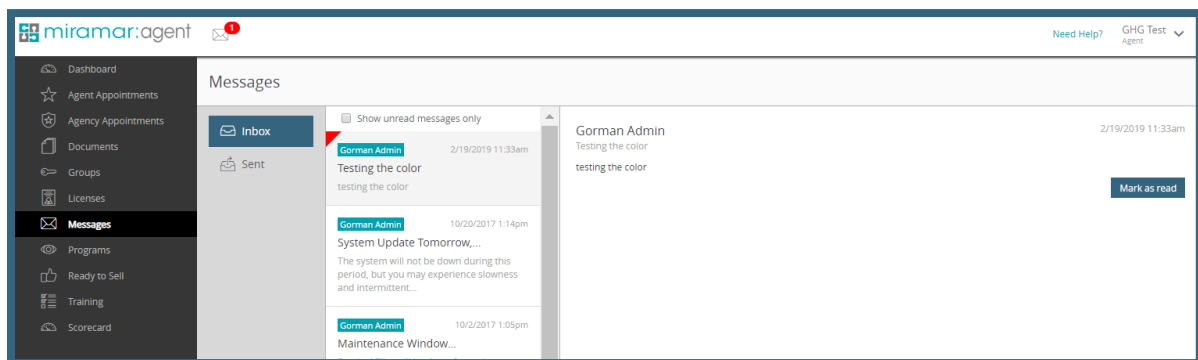
21

MESSAGES

The Messaging Center will be activated when you receive a message. To view your messages that have been sent to or from your plan, click into **Messages** on the Dashboard menu or into the *envelope icon* ✉ at the top of the page.

The envelope icon at the top left of the Agent Dashboard will display in a red bubble how many unread messages you have.
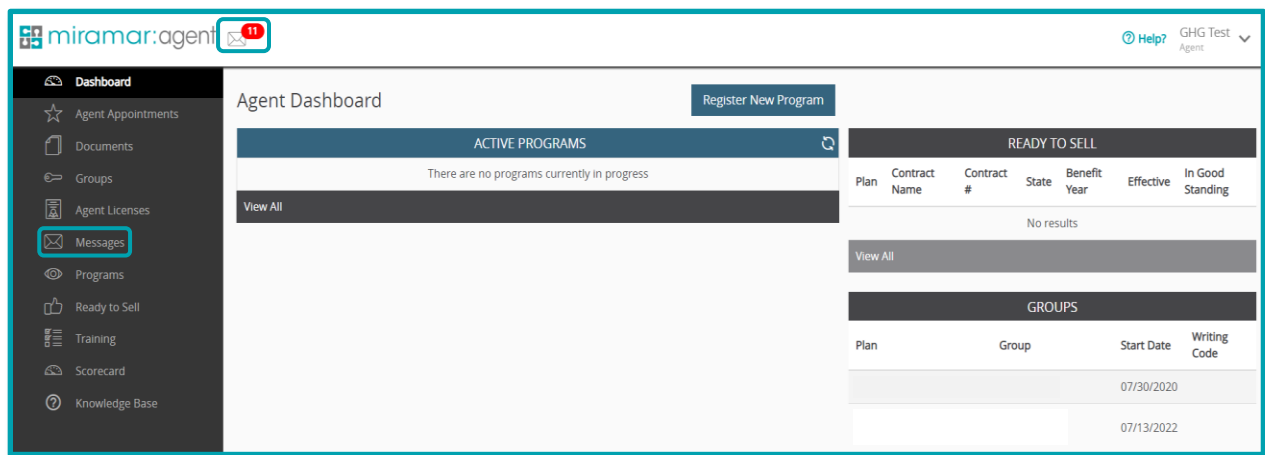
From your messaging center, you can mark messages as read by clicking **Mark as read**. You can also sort to only see your unread messages or view your sent messages.
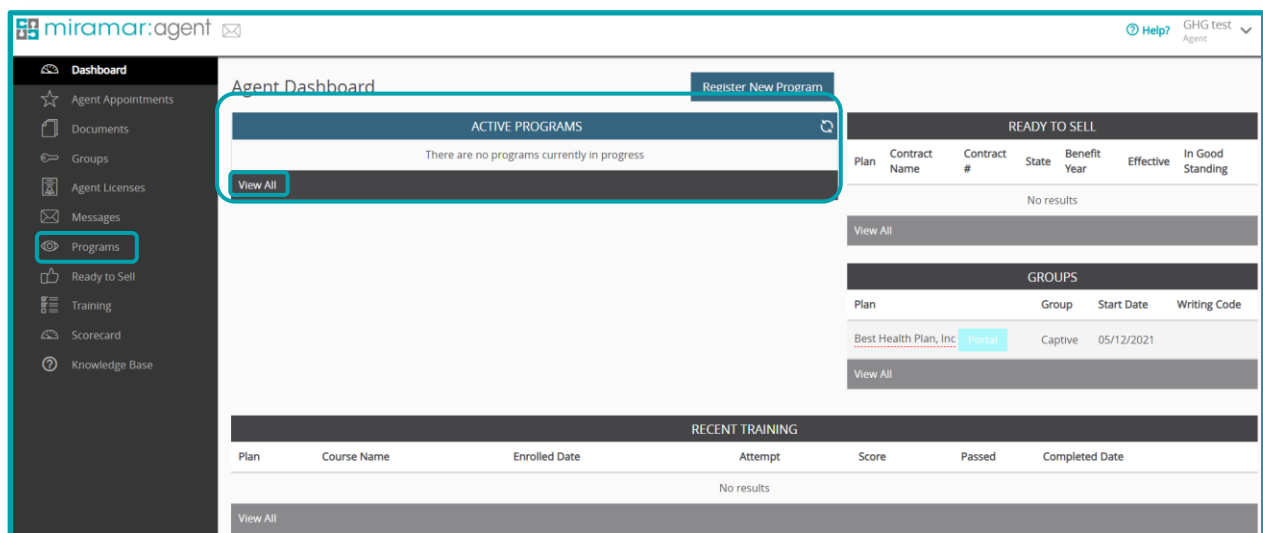
NOTE: Some messages are sent as informational only and will not allow a reply.

Ft. Lauderdale, FL | Chicago, IL | Port St. Lucie, FL | Miramar, FL | Pompano Beach, FL | Lenexa, KS | Yuma, AZ | Manila, PHL
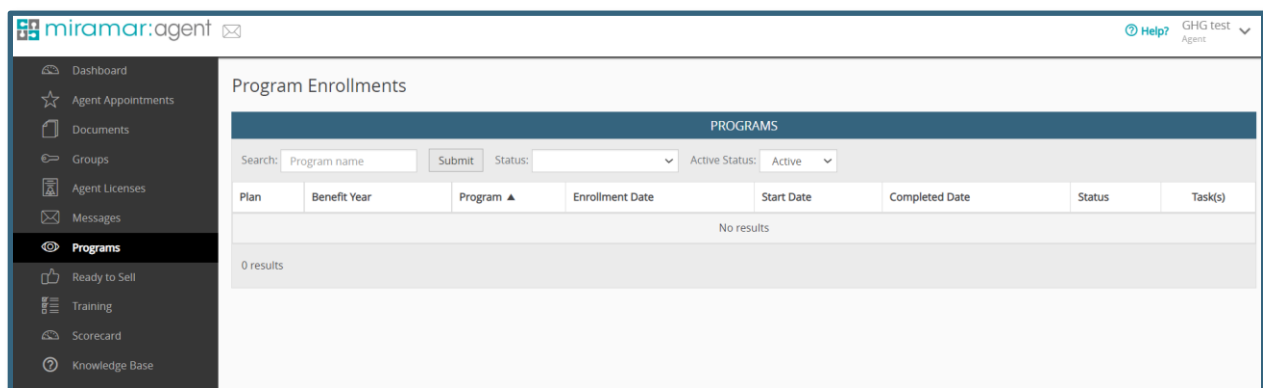
© 2020 Convey Health Solutions

22

PROGRAMS

The not started and in-progress programs will appear on the Dashboard under *Active Programs.* This is where you will be able to action your program steps.

To view all programs, including completed or frozen programs, click **View All** under the Active Programs widget or **Programs** from the 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 you were enrolled in the program, when you started and completed the program, as well as what your current status is within the program. Additionally, you can action the program by clicking into what is listed in the *Tasks* column.

Ft. Lauderdale, FL | Chicago, IL | Port St. Lucie, FL | Miramar, FL | Pompano Beach, FL | Lenexa, KS | Yuma, AZ | Manila, PHL

© 2020 Convey Health Solutions

23

NOTE: For more information on how to navigate within a program, see the section on *Program Navigation.*
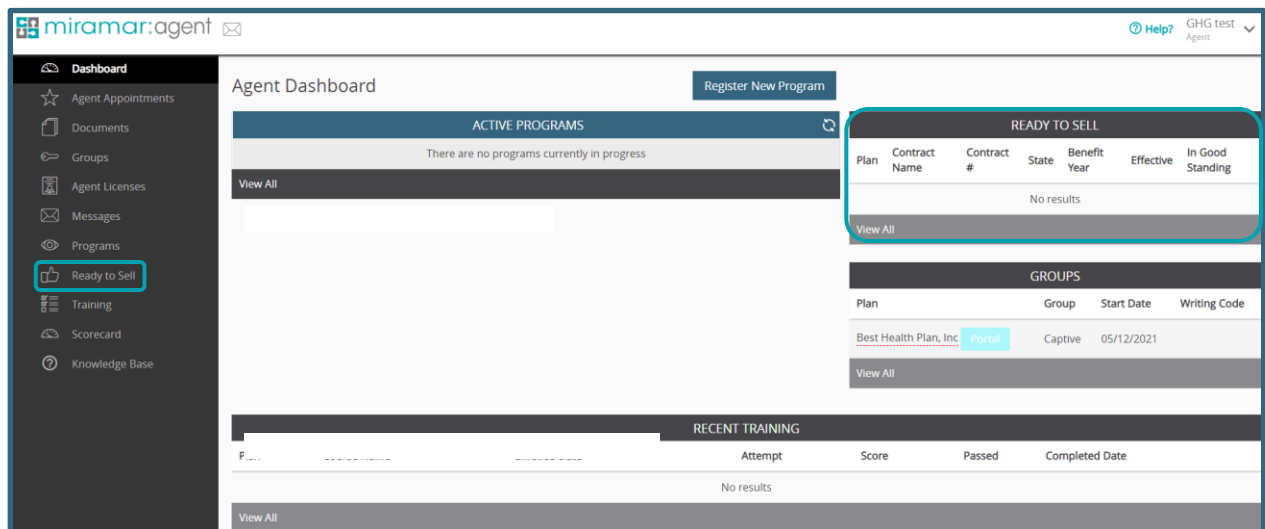
READY TO SELL

Agents who have been granted Ready to Sell (RTS) status have been deemed eligible to produce by the Plan in question by completing all prerequisite steps for the Plan's program. Not all Plans utilize Ready to Sell status within Miramar:Agent.

To view a snapshot of the contracts for which you are Ready to Sell (RTS) for the current and upcoming benefit, view the *Ready to Sell* widget on the right side of the Dashboard. To view a full RTS history, click into **View All** from the RTS widget or **Ready to Sell** from the Dashboard menu. Accepted RTS status (Good Standing) is displayed with a green check mark (✓), while declined status is displayed with a red x mark (**X**), status can also display as N/A for not available.

The RTS date is assigned within a program at the point at which required steps are completed as determined by the plan. RTS status is unique for each of the following:

- Plan / Contract
- State
- Benefit Year
- Effective Date

NOTE: Not all plans use the RTS functionality in Miramar:Agent. If this is the case for the plan(s) whose program(s) you have completed, this section of the Agent Dashboard will not have any records.

When viewing the RTS page, you are able to search by Benefit Year or State or sort by Plan, Contract, Benefit Year, LOB, State, or Effective Date by clicking the column headings.
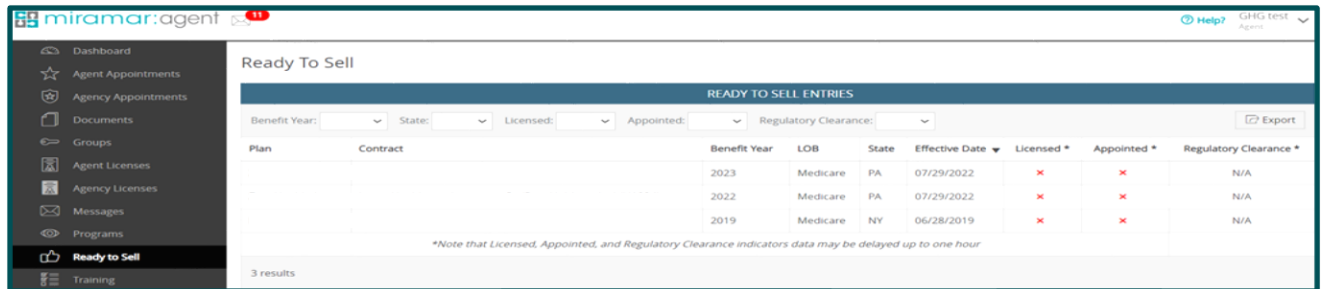
TRAINING

To view trainings completed within the last year, view the *Recent Training* widget on the bottom of the Dashboard. To view a full history of your training information, click **View All** from the Training widget or **Training** from the Dashboard menu.
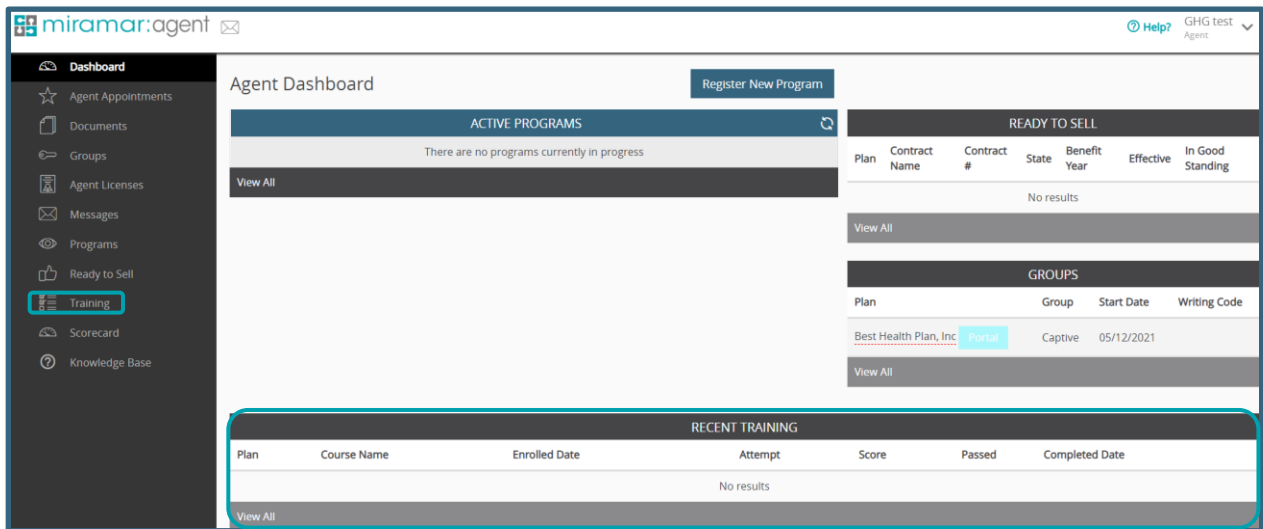
From the Training index, you can search by course name or filter by benefit year or passed status.

Ft. Lauderdale, FL | Chicago, IL | Port St. Lucie, FL | Miramar, FL | Pompano Beach, FL | Lenexa, KS | Yuma, AZ | Manila, PHL

25

Ft. Lauderdale, FL | Chicago, IL | Port St. Lucie, FL | Miramar, FL | Pompano Beach, FL | Lenexa, KS | Yuma, AZ | Manila, PHL

© 2020 Convey Health Solutions

26

IV. PROGRAM NAVIGATION

To take action in an active program, go to the Active Programs widget located at the top of the Agent Dashboard.

To the right of the program name, you will see a green button indicating the next action required. If you have not yet started the program, click the green **Start** button to begin the program.

 NOTE: If there are actions listed but no green button, this means there are no agent-facing steps for you to complete. The program is waiting for outside information such as plan administrator action, document review, appointment confirmation, background check results, etc. Please check back regularly to see if you have any actionable steps until the program is complete.

Ft. Lauderdale, FL ¦ Chicago, IL ¦ Port St. Lucie, FL ¦ Miramar, FL ¦ Pompano Beach, FL ¦ Lenexa, KS ¦ Yuma, AZ ¦ Manila, PHL

© 2020 Convey Health Solutions

27

How do I register for a program using a registration PIN code?
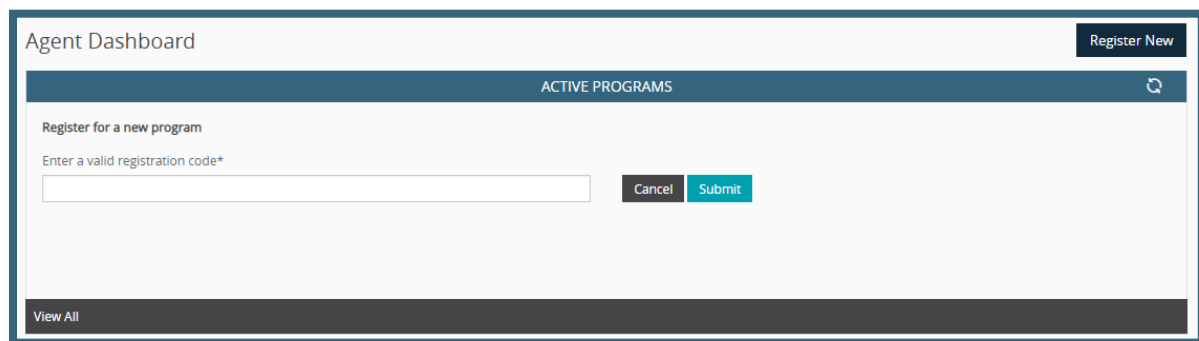
Some organizations may pre-enroll you in programs, in which case you will see the program in your active programs list with a *Start* button.

If you were provided a program registration PIN code by your plan or upline, you can register by clicking the **Register New** button at the top of your screen.
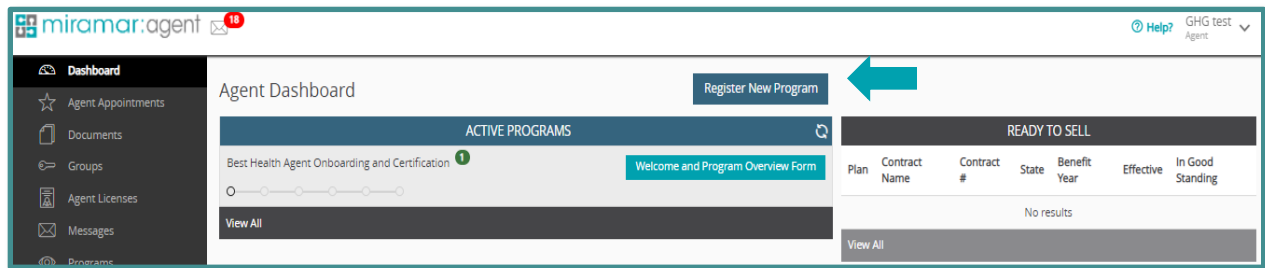

Once you click *Register New*, you will be prompted to enter the program registration PIN code provided by your plan or upline. Click **Submit** to complete the registration. PIN codes are not case sensitive.

IMPORTANT NOTE: If you do not have the registration PIN code for the program you need to complete, please contact your plan or direct upline to obtain one. Miramar:Agent customer support does not provide registration codes.

Ft. Lauderdale, FL | Chicago, IL | Port St. Lucie, FL | Miramar, FL | Pompano Beach, FL | Lenexa, KS | Yuma, AZ | Manila, PHL

© 2020 Convey Health Solutions

28

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 Active Programs widget to see the new program on your dashboard.
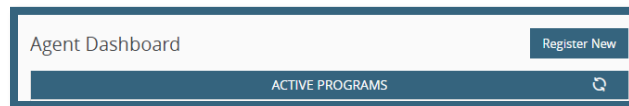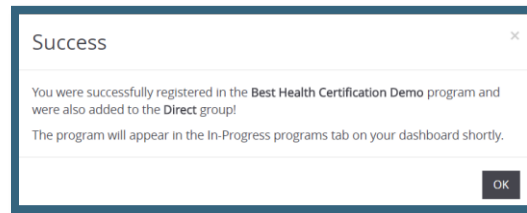

How do I know if I have completed a program?

You may find that when you log in to your agent dashboard, a program you had previously been working on is now no longer showing on the dashboard. This most likely means you have completed the program. To verify, click **Programs** from your dashboard menu to see the status of your program.
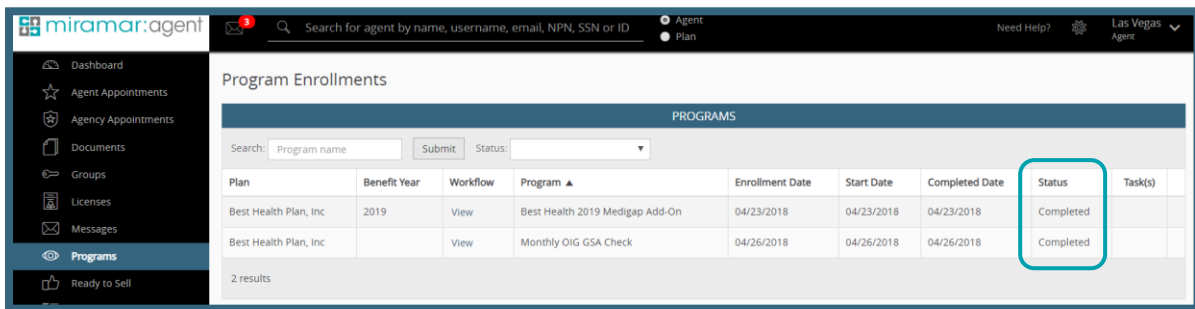
V. Knowledge Base

To access the Miramar:Agent Knowledge Base, go to https://miramar-agent.com/KnowledgeBase or click **Need Help? Click here** from the top of any Miramar:Agent page.
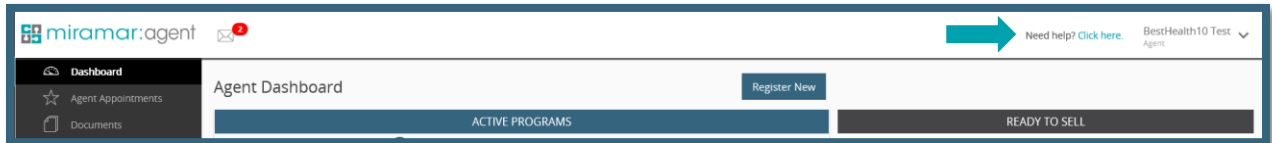
Frequently asked questions and helpful training tips for agents can be found on the Knowledge Base homepage. If you need assistance, you can log a ticket by clicking **Submit Ticket** and a representative from our support center will respond within 24 hours.

Ft. Lauderdale, FL | Chicago, IL | Port St. Lucie, FL | Miramar, FL | Pompano Beach, FL | Lenexa, KS | Yuma, AZ | Manila, PHL

© 2020 Convey Health Solutions

30