Broker Portal User Guide

This document is for users of the new UCare Broker Portal upgrade. It is meant to explain the features that are being implemented in October 2021.

Formatting in this document is as follows:

- *Italic font* – indicates something seen in the system. Things like headers, field names and titles on buttons.
- **Bold font** – indicates an action to be taken such as clicking, selecting, typing and so on.

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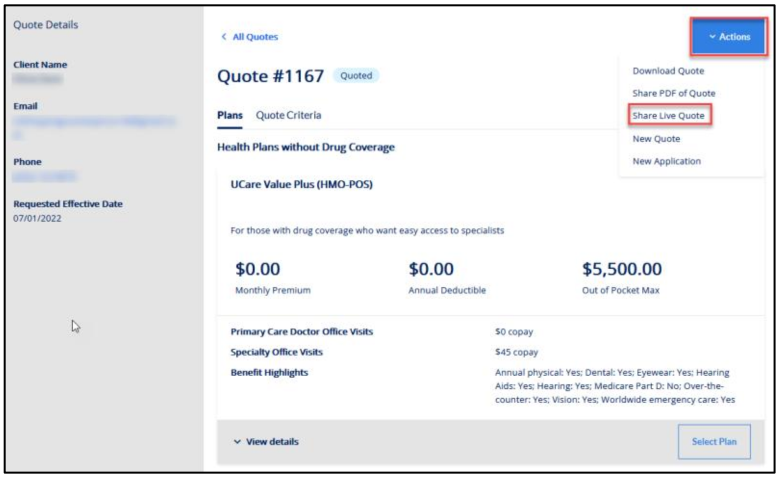
Share Live Quote

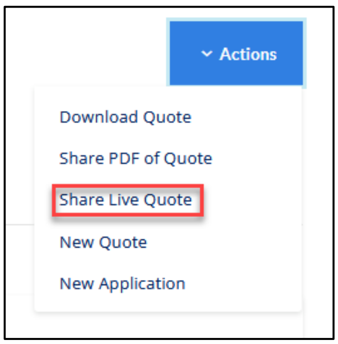
A Broker can share a Quote with a Client. The client is able to login and view that quote and take action in the UCare Enrollment Portal.

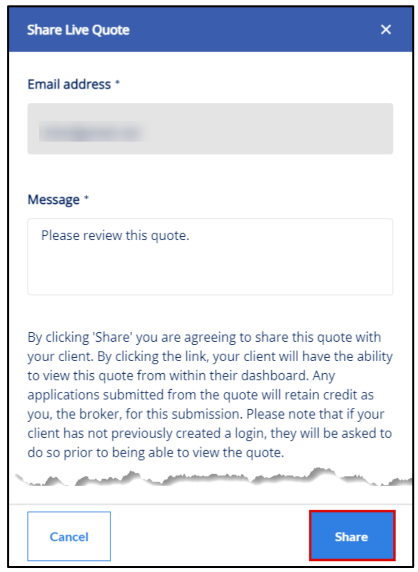
To share a quote:

- Click on the **Quote ID** from the Quote list page. This will open the Quote Details page.
- Click on **Actions**
- Select **Share Live Quote** from the actions dropdown

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



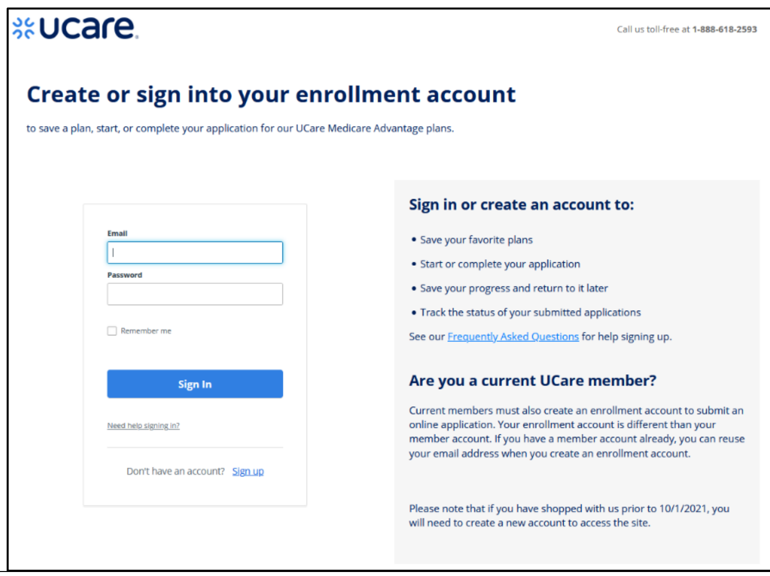




Share Live Quote – Client Experience

Email

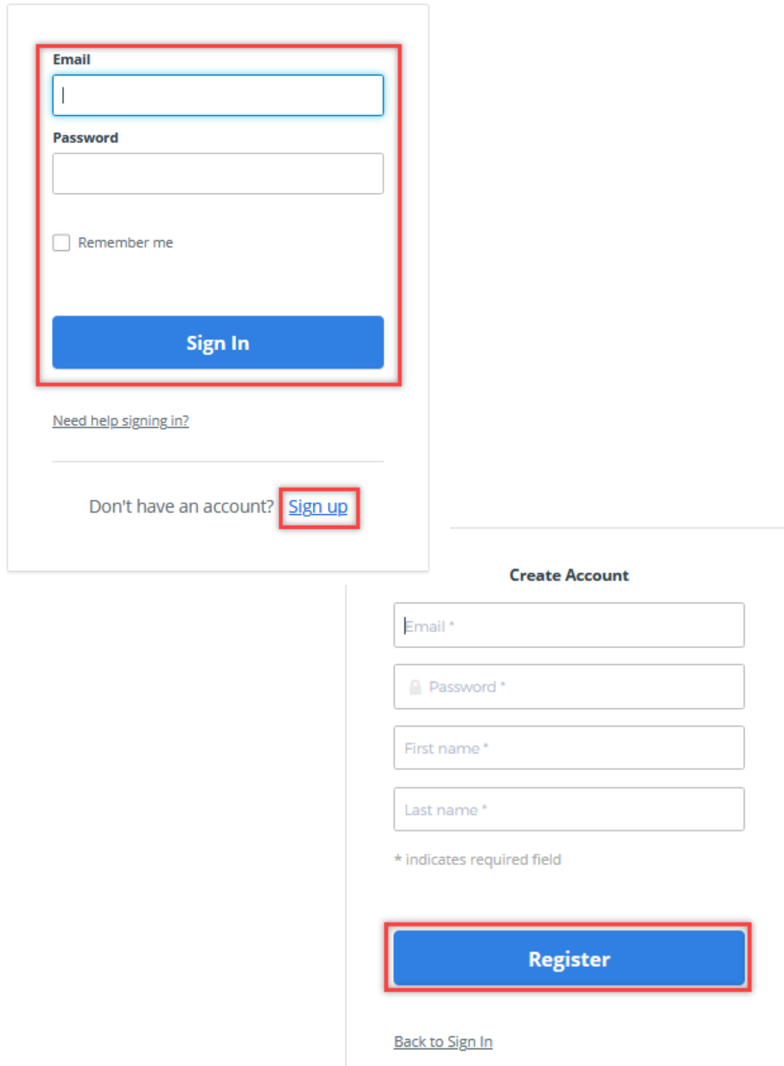
The client can now access the email in their inbox. Clients must **click on the hyperlink.** This will open the UCare enrollment account login page.



Create an Account

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

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



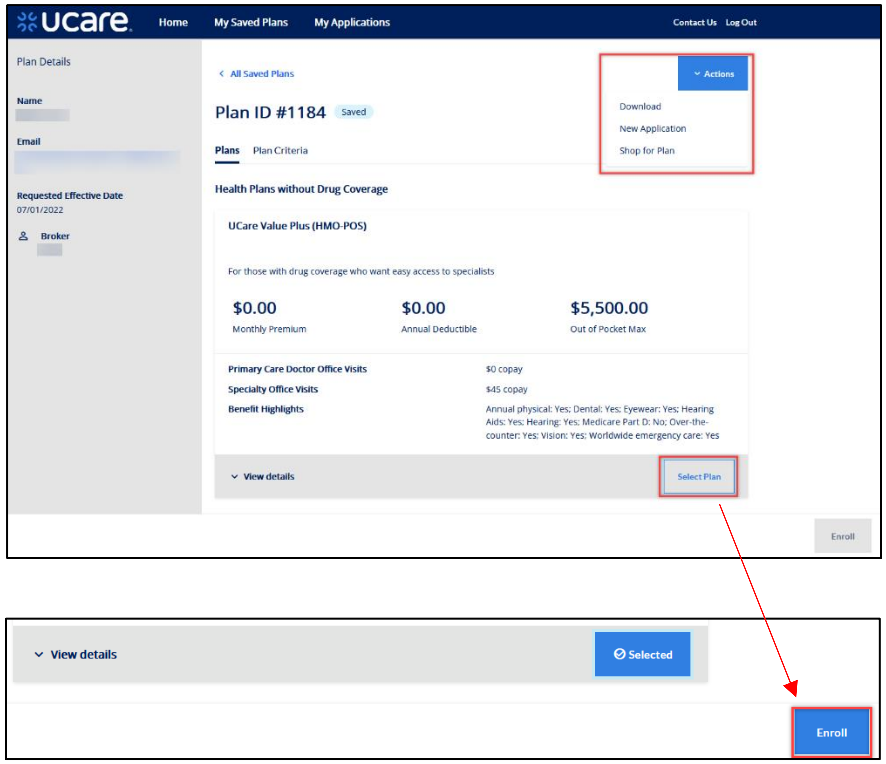
Client View/Options

When the client logs in, they will be directed to the plan details page with the shared quote information.

Clients can take action on the quote or start an application from the quote.

If the client chooses to start an application from the quote they will need to click **Select Plan.** Then Enroll button will turn blue and can now click on the enroll button to start the application.

NOTE: If a client starts an application from the shared quote, the Broker can track the application progress but cannot edit the application in the Broker Portal.
If the client wants the Broker to complete the application after it has been started, the Broker will need to start a new application.



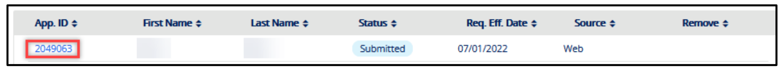
Share Application

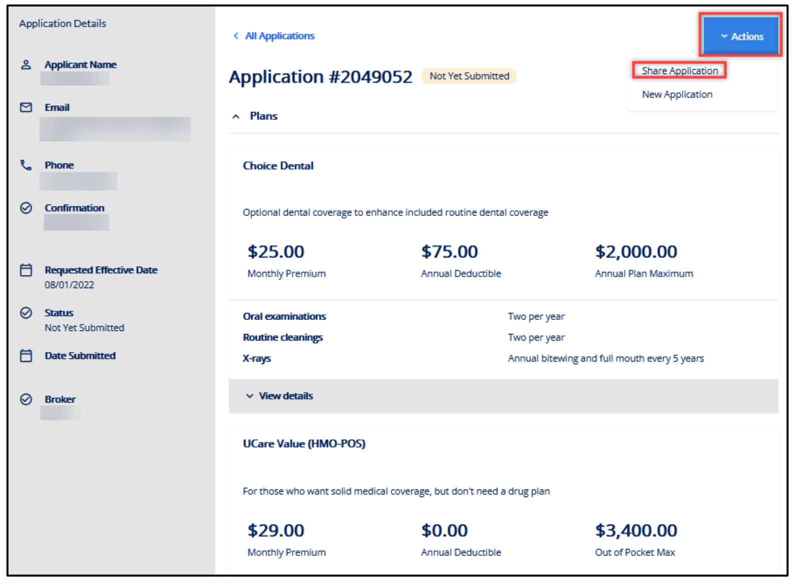
A Broker may share an Application with a client. The client can then log in to view or continue the application.

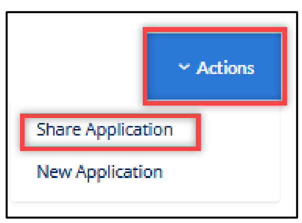
To share an application:

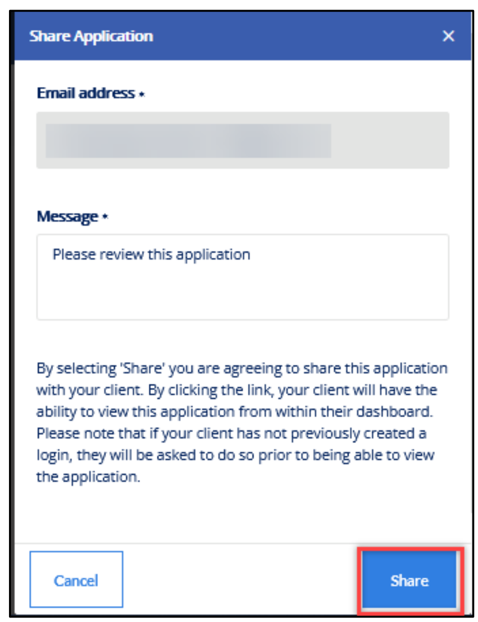
- Click on the **App ID** from the Application list page. This will open the Application Details page.
- Click **Actions**
- Select **Share Application**

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





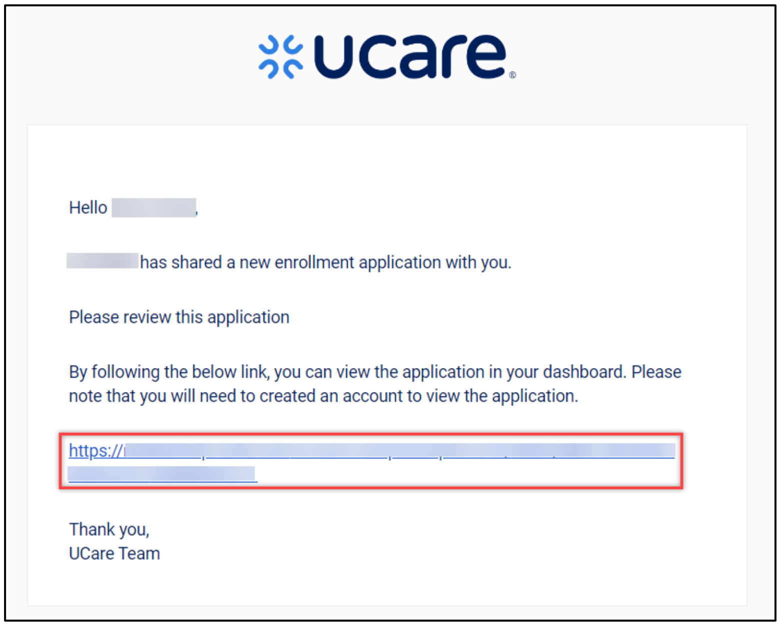


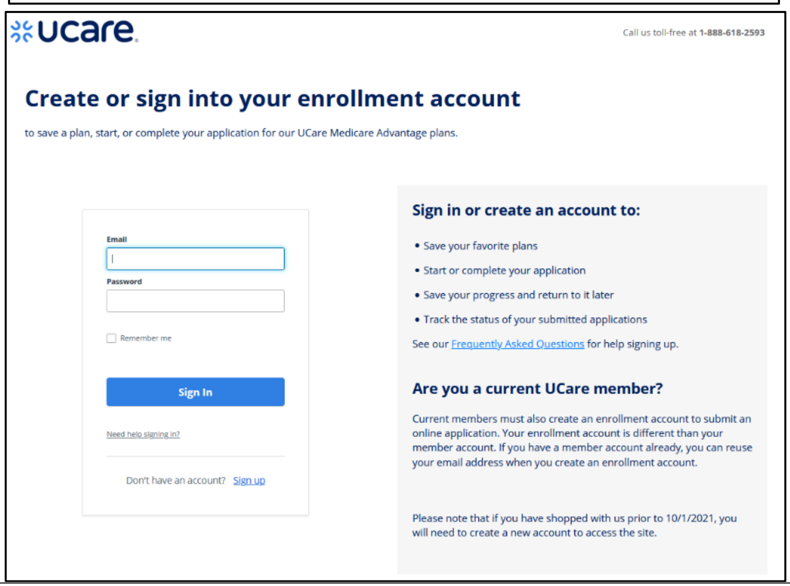


Share Live Application – Client Experience

Email

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

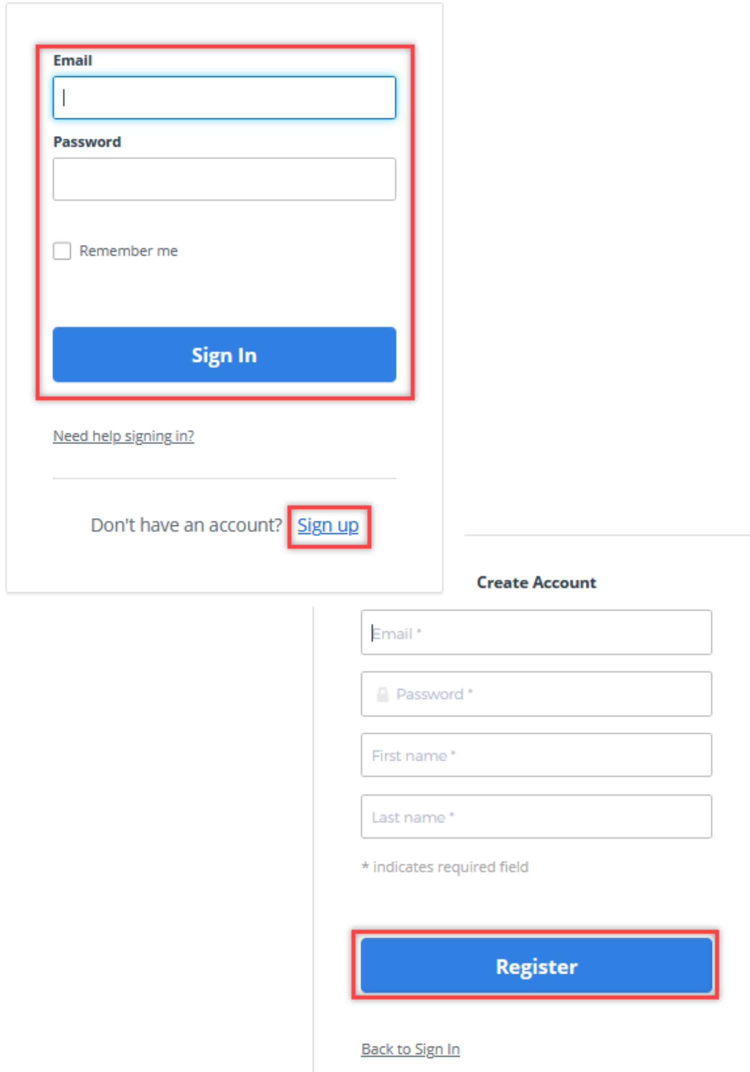




Create Account

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

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



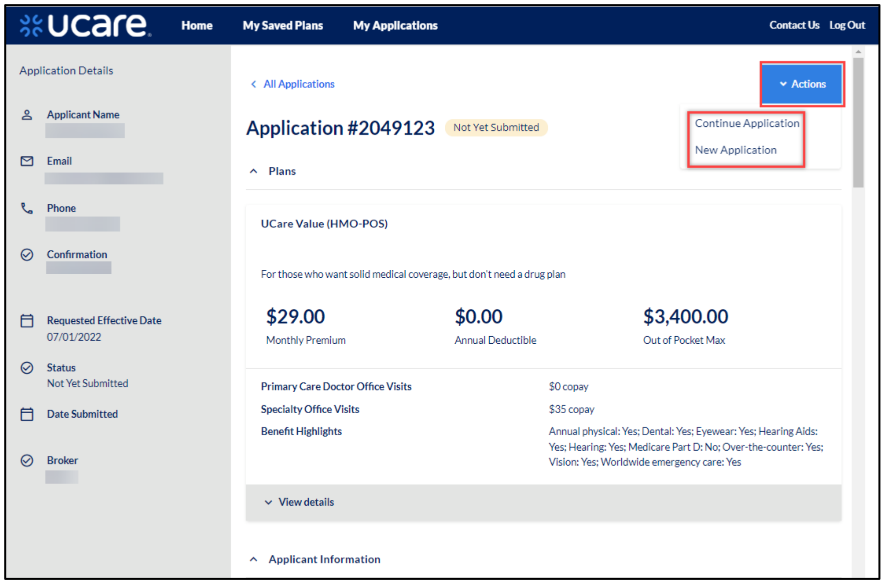
Client View/Options

After logging in, the shared application will display.

The client has a choice of actions. They can continue the Application or start a new Application.

The enrollment application process in the enrollment portal follows the same flow as in the Broker Portal.

NOTE: Once the client logs into the account to see the shared application the Broker can track the progress but will not be able to make any changes. If the client wants the Broker to complete the application after it has been shared, the Broker will need to start a new application.



Action and Status

Share Live Quote – Action and Status

When a…	*The status the Broker will see is…*	*The actions a Broker can take are…*	*The status the client will see is…*	*The actions a client can take are…*
Quote is created by Broker	Quoted	Download Quote Share PDF of Quote Share Live Quote New Quote New Application	N/A	N/A
Quote is shared by Broker	Quoted	Download Quote Share PDF of Quote Share Live Quote New Quote New Application	N/A	N/A
Client logs in to view the shared quote.	Quoted	Download Quote Share PDF of Quote Share Live Quote New Quote New Application	Saved	Download New Application Shop for Plan
Client saves the application created from a shared quote	Quote Status: Applied Application Status: Not Yet Submitted	Share Application New Application	Quote Status: Applied Application Status: Not Yet Submitted	Continue Application New Application
Client submits application created from a shared quote	Quote Status: Applied Applications Status: Submitted	Download Application Share Application New Application	Quote Status: Applied Application Status: Submitted	Download Application New Application

Note: After the application has been submitted, the Broker and client will be able to track the status on their respective Broker and enrollment portals.

Quote Statuses

Status terms that track the lifecycle of a quote

Quote Status	Definition
Quoted	The quote has been successfully saved.
Expired	The quote has expired. A quote will expire on the requested effective date if no application has been submitted.
Applied	The user has selected plans and initiated an application.

Share Live Application – Action and Status

When a…	*The status the Broker will see is…*	*The actions a Broker can take are…*	*The status the client will see is…*	*The actions a client can take are…*
Application is started by Broker	Not Yet Submitted	Save & Exit Save & Continue	N/A	N/A
Application is saved by Broker	Not Yet Submitted	Continue Application Share Application New Application	N/A	N/A
Application is shared by Broker	Not Yet Submitted	Continue Application Share Application New Application	N/A	N/A
Client logs in to view or start the shared application	Not Yet Submitted	Share Application New Application	Not Yet Submitted	Continue Application New Application
Client saves the shared application	Not Yet Submitted	Share Application New Application	Not Yet Submitted	Continue Application New Application
Client submits the shared application	Submitted	Download Application Share Application New Application	Submitted	Download Application New Application

Note: After the application has been submitted, the Broker and client will be able to track the status on their respective Broker and enrollment portals.

Application Statuses

Status terms that track the lifecycle of an application

STATUS	MEANS
Not Yet Submitted	The application was started but has not been submitted.
Submitted	The application was submitted. This status will display for up to two hours, then change to "In Progress".
In Progress	The application has been submitted and is being processed.
Pending Medicare Approval	The application has been sent to Medicare for review.
On Hold - Applicant Outreach	The application is being processed but it is incomplete and requires additional information. We will reach out to the applicant for additional details.
Rejected	The application was rejected either because one or more required documents were not received, or CMS rejected the application due to other reasons.
Cancelled	The application was cancelled by request.
Denied	The application was denied due to non-receipt of required information.
Enrolled	The application has been approved by CMS.