

This document is designed to give a user of the Broker Portal a side-by-side look at where to find information in the new Ucare Broker Portal.

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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Old Broker Portal

Sign into Broker Portal

welcome brokers

Thank you for partnering with UCare and Aspirus Health to deliver great coverage to Medicare-eligible individuals throughout Minnesota and Wisconsin.

UCare is truly people-powered—and it's independent agents and brokers like you who help de-mystify Medicare so our members can find the right plan for their needs.

Customer Service Toll Free: 1-855-931-4850
Commission questions: brokerfinancialinquiries@ucare.org

New Broker Portal

Sign into Broker Portal

Welcome Back!
Please log in with your account to continue your application.



Username *
ucarebrokered1

Password *

Log In

Not Yet Registered?

Our not-for-profit status allows us to focus on our mission — caring more for our members than the bottom line.

Old Broker Portal	New Broker Portal
<p data-bbox="184 329 483 418">Portal Navigation Navigation Menu</p> <div data-bbox="176 540 1035 691"> Home Contacts Applications Commissions Members Tools & Resources Need Help</div>	<p data-bbox="1092 329 1390 418">Portal Navigation Navigation Menu</p> <p data-bbox="1073 443 1927 548">The blue top navigation bar represents the primary tool for accessing in the various pages the Broker will want to utilize in the portal. This navigation feature supports both single and multi-level navigation.</p> <div data-bbox="1064 631 1955 672"> Workbench Clients Quotes Applications Members Resource Center Commissions Contact Us Log Out</div>

Workbench / Home Page

The Home page gives brokers access to their *Members*, *Contacts* and *Applications*.

The five most recent items display in one of three lists. Each list also has a link to *Show All* items in the list.

The *Contacts* list also includes a button to *Create Contact*.

Member #	Member Name	Effective Date	Status
	DEBRA BARNES	7-1-2021	Active
	DEBRA KOENIG	1-1-2021	Inactive
	MATTHEW MILLEI	3-1-2021	Active
	MARK HYSER	1-1-2021	Active
	III I GALL AHFR	1-1-2021	Active

First Name	Last Name	Phone	Email
test1	prodtest		test+005@gmail
Michelle	Ebert		michelleebert08
Randi	Weaver		weav0022@um
Jim	Dulin	6127102423	

App. ID #	Subscriber Name	Req. Eff. Date	Status
50641600	RANDI WEAVER		Duplicate
48814988		8-1-2021	Not Yet Submitte
48609846	MICHELLE EBERT	6-1-2021	Enrolled
40054771	RANDI WEAVER	6-1-2021	Enrolled

Workbench

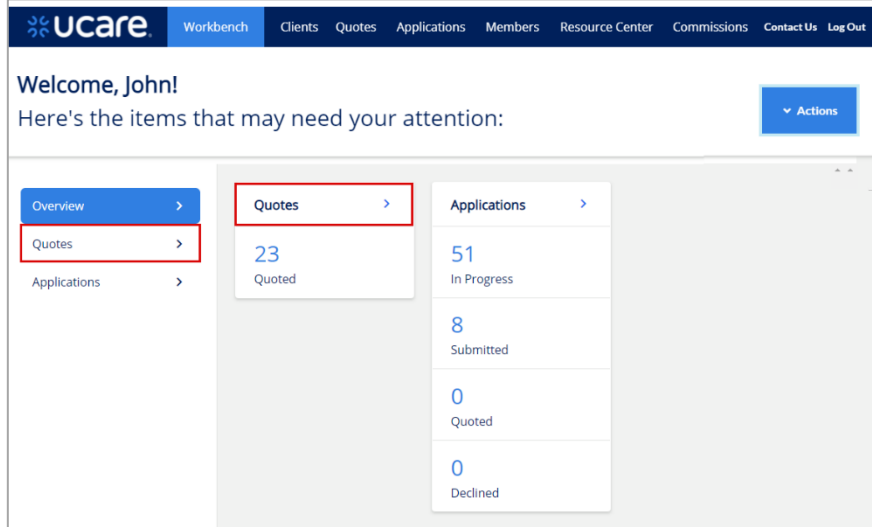
The Workbench is a central location for Brokers once they have successfully logged into their respective portal. The following sections describe the Workbench feature for each Broker group.

Broker Workbench - Overview

This feature allows a Broker to view a summary of records requiring action across multiple record types relevant to the Broker.

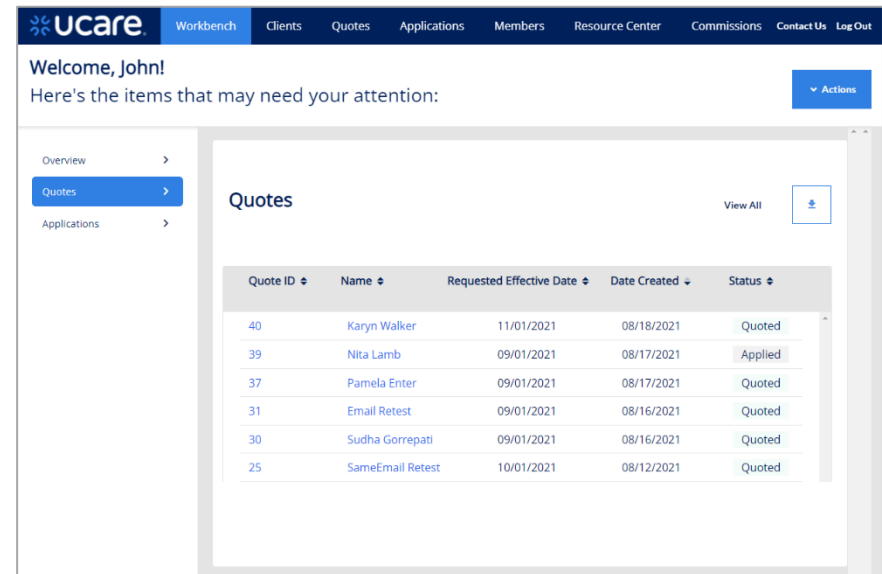
NOTE: The items found on the *Workbench* include Quotes and Applications that may require the Broker's attention.

ALSO NOTE: Links to Quotes and Applications on the blue navigation bar at the top will give access to all quotes and applications not only those that need attention.

Old Broker Portal	New Broker Portal
<p>Broker Portal – Quotes</p> <p>[Does not exist today]</p>	<p>Broker Workbench - Quotes</p> <p>The Broker may access a list of <i>Quotes</i> requiring action on their part by clicking <i>Quotes</i> in one of two places – the left navigation bar, and the main body of the portal interface.</p>  <p>NOTE: The <i>Quotes</i> link in the blue navigation bar at the top of the page will give access to ALL Quotes, not only those that require the Broker’s current attention.</p>

The following details can be viewed on the *Quotes* list:

- *Quote ID*
- *Name* (of the potential subscriber)
- *Requested Effective Date*
- *Date Created*
- *Status*



A Quote could have one of three statuses:

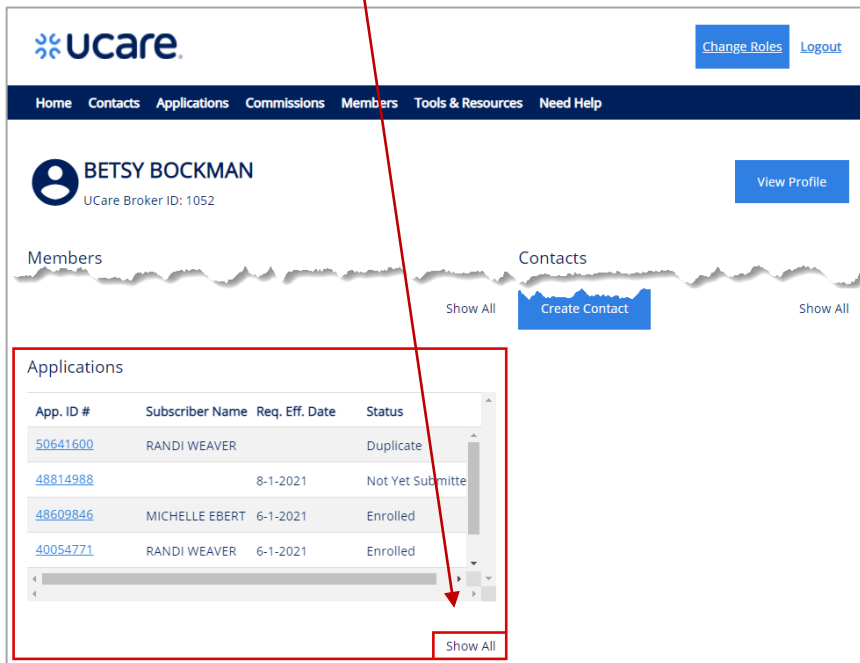
- *Quoted* – the quote has been successfully saved
- *Expired* – the Requested Effective Date has been exceeded
- *Applied* – the Broker has selected plans and initiated an application

Old Broker Portal

Broker Portal – Applications

The broker can view a list of Applications that require action on their part.

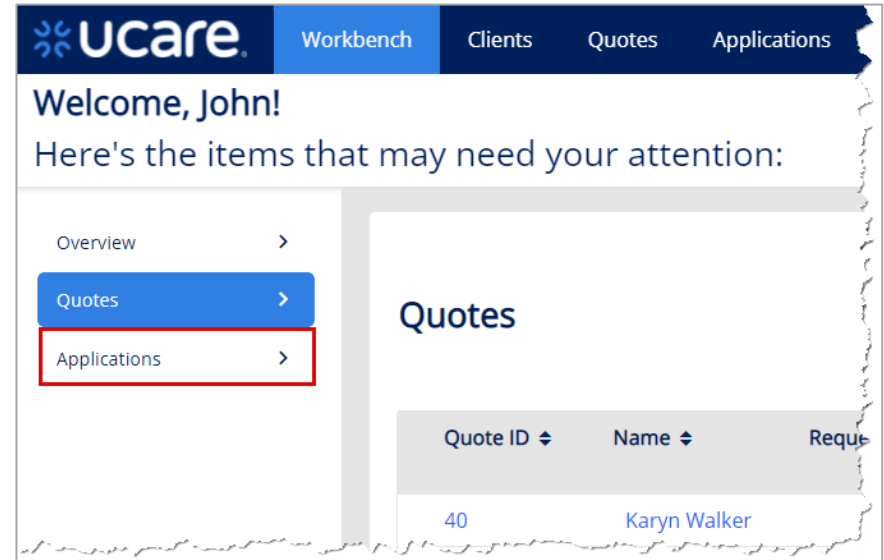
A snapshot of these applications can be seen on the Home page. To view the rest of the list, click **Show All** in the lower right corner of the section.



New Broker Portal

Broker Workbench - Applications

The Broker may access a list of Applications requiring action on their part by clicking **Applications** on the left navigation bar.



REMEMBER: Clicking *Applications* on the blue navigation bar at the top gives access to all applications, not only those currently needing your attention.

Old Broker Portal

The list of *Applications* displays. The Broker may filter the list by application (search by *Application ID*), *Status* or *Date* of submission.

To find a desired application, consider details such as:

- *Application ID*
- *Subscriber Name*
- *Proposed Effective Date*
- *Status*
- *Date Submitted*

Applications

Filter by Application: Search by Application ID or Subscri... Filter by Status: Filter by Apps Submitted: mm/dd/yyyy Search Clear Filters

Application ID	Subscriber Name	Proposed Effective Date	Status	Date Submitted
47853727	prod test	8-1-2021	Not Yet Submitted	
1355	Test Testerooni	11-1-2018	Not Yet Submitted	
180553	CAUMALIE YAJTEST		Pending	10/16/18
14046867	Peter Katz	2-1-2020	Submitted	11/4/19
13983173	sundar sarkar	1-1-2020	Submitted	10/15/19
13850815	Helen Tim	12-1-2019	Submitted	10/2/19
48814984	prod test	7-1-2021		
48814983		7-1-2021		

107 total 7 8 9 10 11 >>

New Broker Portal

The following details can be viewed on the *Applications* list:

- *Application ID*
- *Applicant Name*
- *Date Submitted*
- *Source*
- *Status*
- *Requested Effective Date*

Ucare Workbench Clients Quotes Applications Members Resource Center Commissions Contact Us Log Out

Welcome, John! Here's the items that may need your attention: Actions

Overview > Quotes > Applications >

Applications View All Applications

Status - All

Application ID	Applicant Name	Date Submitted	Source	Status	Requested Effective Date
140	Sudha Gorrepati	09/28/2021	web	Submitted	11/01/2021
139	Dan Miller	09/28/2021	web	Submitted	01/01/2022
138	James Parkar	09/28/2021	web	Submitted	10/01/2021
137	Dan Miller	09/28/2021	web	Submitted	11/01/2021
136	Dan Miller	09/28/2021	web	Submitted	10/01/2021
135	James Parkar	09/28/2021	web	Submitted	11/01/2021
134	Sudha Gorrepati	09/28/2021	web	Not Yet Submitted	11/01/2021
133	James Parkar	09/28/2021	web	Not Yet Submitted	10/01/2021
132	James Parkar	09/28/2021	web	Not Yet Submitted	10/01/2021
131	Sudha Gorrepati	09/28/2021	web	Submitted	12/01/2021

Showing 1 - 10 of 13 << < 1/2 > >>

Contact/Client Management

Contact Management allows brokers to manage their contacts including reviewing their contact list, adding new contacts, editing existing contacts and reviewing contact details.

Brokers may:

1. Search for a contact by name, phone, or email
2. Filter the contact list by those with policies, those with applications or those with no policies or applications
3. Access the contact record by clicking links for any of the record details = *First Name, Last Name, Phone, or Email*
4. Add a new contact by clicking the **New Contact** button

First Name	Last Name	Phone Number	Email	Created
deploynight	test		test1_2@gmail.com	8-5-2021
TEST	PRQD	4938549850	test+111@gmail.com	5-24-2021
prodtest1	QAtest		test+0001@gmail.com	5-13-2021
prod	test	6777345345	test+0011@gmail.com	5-13-2021
prod	test		test+001@gmail.com	5-6-2021
ProdTest	TestProd		pgzipari@gmail.com	5-6-2021
prodtest	prodtest		test00012@gmail.com	4-29-2021
Prod One	Test		pgzipari+46573@gmail.com	4-6-2021
prodtest	post_prod		test+1@gmail.com	3-30-2021
prod	testin	4848484844	pgzipari+3301prod@gmail.com	3-30-2021

Contact/Client Management

Client Management allows Brokers to manage their associated clients including reviewing their client list, adding new clients, editing existing clients and reviewing client details.

Brokers may:

1. Search for a client by typing all or part of the name
2. Access the client record by clicking the *Last Name* link
3. Add a new client by clicking the **Add New Client** button
4. Export the entire client list by clicking the export icon

Last Name	First Name	Phone Number	Address	Email	Date Created
Last1	Customer1	(435) 353-4534	500 stinson	v3shoppingucareaspirus@gmail.com	09/28/2021
Parkar	James	(222) 222-2222	500 Stinson Blvd S	v3shoppingucareaspirus+151@gmail.com	09/28/2021
Miller	Dan	(111) 111-1112	600 Stinson blvd s	v3shoppingucareaspirus+154@gmail.com	09/28/2021
Gorrepati	Sudha	(111) 111-1111	500 Stinson Blvd S	v3shoppingucareaspirus+150@gmail.com	09/28/2021
Parker	Susan	(444) 444-4444	600 Stinson Blvd S	v3shoppingucareaspirus+153@gmail.com	09/28/2021
Rich	Dennis	(333) 333-3333	500 Stinson Blvd S	v3shoppingucareaspirus+152@gmail.com	09/28/2021
LN	PITClient1	(123) 421-4424	203 NE Clark Dr	vgudoori@zipari.com	09/28/2021

NOTE: To locate clients who have already been enrolled, go to *Members* on the blue navigation bar at the top.

Create New Contact/Client

From the Broker Portal Home page, create a new contact by clicking the button labeled *Create Contact*, or from the *Contacts* list the button is labeled *New Contact*. Either button will open the New Contact window where required data may be entered.

First Name	Last Name	Phone	Email
TEST	PROD	4938549850	test+111@gmail.c
prodtest1	QAtest		test+0001@gmail
prod	test	6777345345	test+0011@gmail
prod	test		test+001@gmail.c

Create Contact

Show All

New Contact
✕

First Name*

Last Name*

Contact Information* (Required)

Email

OR

Phone

First Name	Created
deploynight	8-5-2021

Enter data in the following fields:

- *First Name*
- *Last Name*
- *Email*
- *Phone*

When all data has been entered, click **Create**.

Create New Client

The Broker can create a new client in several different ways and stages of their process. It can be done as a new “stand alone” Client as you are used to doing in the previous Broker portal, or it can be done at the time you are creating a new quote or application.

Here we show creating the new Client from the Workbench by clicking **Actions** and then **New Client**. One alternative is to click **Add New Client** from the *Clients* page.

Add New Client

New Client Details

First Name *

Last Name *

Email *

County *

Complete the required fields for the new client such as:

- *First and Last Name*
- *Email*
- *Phone Number*
- *Address including City, State, Zip Code and County*

When all data has been entered, click **Save**.

Old Broker Portal

On the *Contact Details* page, the broker can view demographic information, add *Notes* to the record, access *Applications* and *Policies* for this person, and *Create an Application* if needed.

Contact Details

Michelle Ebert

Email Address
michelleebert08@gmail...

Phone Number

Created
5-12-2021

[Edit](#)

Policies

Subscriber Name	Subscriber ID	Effective Date	Product Type	Status
No data to display				

0 total

Notes

Type your notes here

Save

Applications

Application ID	Subscriber Name	Proposed Effective	Application Type	Status	Date Submitted
48609846	MICHELLE EBERT	6-1-2021	WebApp	Enrolled	5/24/21

1 total

Create Application

New Broker Portal

On the *Client Details* page, the broker can view demographic information, as well as view any *Applications* or *Quotes* for this client. In addition, a *New Quote* or *New Application* can be initiated from this page.

ucare Workbench Clients Quotes Applications Members Resource Center Commissions Contact Us Log Out

< All Clients

Email
v3shoppingucareaspirus+151@g
mail.com

Phone
(222) 222-2222

Date Created
09/28/2021

Address
500 Stinson Blvd S Minneapolis,
MN 55413

[Edit Client Details](#)

James Parkar

New Quote

New Application

Applications

Quotes

Application ID	Applicant Name	Date Created	Requested Effective Date	Plan	Status
144	James Parkar	09/28/2021	10/01/2021	UCare Value Plus (HMO-POS)	Not Yet Submitted
138	James Parkar	09/28/2021	10/01/2021	UCare Complete (HMO-POS)	Submitted
135	James Parkar	09/28/2021	11/01/2021	UCare Classic (HMO-POS) Classic Choice Dental	Submitted
134	James Parkar	09/28/2021	11/01/2021	UCare Prime (HMO-POS) Choice Dental	Not Yet Submitted
130	James Parkar	09/28/2021	10/01/2021	UCare Essentials Rx (HMO-POS)	Submitted

Showing 1 - 5 of 5

Old Broker Portal

Contact/Client Details

Contact/Client Details - Application

The Broker may view details of the application by clicking the *Application ID* of the application they wish to examine.

Here, we click **Application ID 48609846**.

Contact Details

Michelle Ebert

Email Address
michelleebert08@gmail...

Phone Number

NOTES

Type your notes here

Save

Policies

Subscriber Name Subscriber ID

No data to display

Applications

Application ID	Subscriber Name
48609846	MICHELLE EBERT

New Broker Portal

Contact/Client Details

Contact/Client Details - Application

The Broker can view details for a client including personal and demographic information as well as associated quotes, applications, and policies.

< All Clients

James Parkar

New Quote New Application

Applications Quotes

Application ID	Applicant Name	Date Created	Requested Effective Date	Plan	Status
144	James Parkar	09/28/2021	10/01/2021	UCare Value Plus (HMO-POS)	Not Yet Submitted
138	James Parkar	09/28/2021	10/01/2021	UCare Complete (HMO-POS)	Submitted
135	James Parkar	09/28/2021	11/01/2021	UCare Classic (HMO-POS) Classic Choice Dental	Submitted
134	James Parkar	09/28/2021	11/01/2021	UCare Prime (HMO-POS) Choice Dental	Not Yet Submitted
130	James Parkar	09/28/2021	10/01/2021	UCare Essentials Rx (HMO-POS)	Submitted

Showing 1 - 5 of 5

When a Broker initiates a new application from the Client details page, a static text message displays to remind them the application will be associated with the client from whose page the application was launched.

< All Clients

James Parkar

New Quote New Application

To start an application for James Parkar select 'Continue'. To start an application for someone else select 'Cancel' and select a different client or create a new one.

Cancel Continue

Old Broker Portal

The application displays with categories of information for:

- Eligibility Information
- Subscriber Information
- Medicare Questionnaire
- Plan
- Primary Care Clinic
- Billing Method

Each of these categories can be expanded so the broker may browse more of the specifics of the application.

The screenshot shows a summary card for an application. On the left, it lists 'Application Details', 'Submitted On 5/24/21', and 'Confirmation 44368280419'. To the right, there are seven expandable sections: Eligibility Information, Subscriber Information, Medicare Questionnaire, Plan, Primary Care Clinic, and Billing Method. At the bottom, there are two blue buttons: 'Return to Contact Details' and 'Print Application Summary'.

Buttons at the bottom of the page allow the broker either to:

- Return to Contact Details, or
- Print Application Summary

New Broker Portal

To view an application, click the **Application ID**.

Application ID	Applicant Name	Date Submitted	Source	Status	Requested Effective Date
144	James Parkar	09/28/2021	web	Not Yet Submitted	10/01/2021

The status of this application is *Not Yet Submitted*, meaning the Broker is still working to enter all the information for this applicant. There is a progress bar which shows the step or stage this application is currently at – in this example it's the first step, *Applicant Information*.

The screenshot shows the 'Applicant Information' form. It includes a progress bar at the top with steps: Applicant Information (selected), Medicare Questions, Primary Care Clinic, Payment Method, Review Application, Sign and Complete, and Confirmation. The form fields include: 'What is your relationship to the enrollee?' (radio buttons for Self, Legal Guardian, Power of Attorney), 'Requested Effective Date' (calendar picker for 11/01/2021), 'Prefix', 'First Name' (James), 'Middle', and 'Last Name'. At the bottom right, there are 'Save & Exit' and 'Save & Continue' buttons.

If you are done viewing the application, click **Save & Exit** to go back to the Client record.

The screenshot shows the client record for 'James Parkar'. It has two tabs: 'Applications' and 'Quotes'. The 'Quotes' tab is selected and highlighted with a red box. Below the tabs is a table with columns for 'Application ID' and 'Applicant Name', showing one entry with ID '144' and name 'James Parkar'.

To view quotes for this same applicant/client, click the header link for **Quotes**.

Client Details - Quotes

Client Details - Quotes

This feature allows the Broker to view details for a client including personal and demographic information as well as associated quote, applications, and policies.

The screenshot shows the Ucare Broker Portal interface. On the left, there is a sidebar with client contact information: Email (v3shoppingucareaspirus+151@gmail.com), Phone ((222) 222-2222), Date Created (09/28/2021), and Address (500 Stinson Blvd S, Minneapolis, MN 55413). The main content area displays the client name "James Parker" and two buttons: "New Quote" and "New Application". Below this, there are tabs for "Applications" and "Quotes", with "Quotes" selected. A table lists two quotes:

Quote ID	Date Created	Requested Effective Date	Plan	Status
73	09/28/2021	10/01/2021	Care Core: M Health Fairview & North Memorial (HMO-POS)	Quoted
71	09/28/2021	11/01/2021	UCare Value Plus (HMO-POS)	Quoted

At the bottom of the table, it says "Showing 1 - 2 of 2".

When a Broker initiates a new quote from the Client details page, a static text message displays to remind them the quote will be associated with the client from whose page the quote was launched.

This screenshot shows a close-up of the "New Quote" button on the client details page. A red box highlights the button, and a red arrow points from it to a confirmation dialog box. The dialog box contains the following text:

To start a quote for James Parker select 'Continue'.
To start a quote for someone else select 'Cancel' and select a different client or create a new one.

At the bottom of the dialog box, there are two buttons: "Cancel" and "Continue".

Client Details - Quotes

To view a quote for this client, click the **Quote ID**.

Quote ID	Date Created	Requested Effective Date	Plan	Status
73	09/28/2021	10/01/2021	Care Core: M Health Fairview & North Memorial (HMO-POS)	Quoted

The quote shows high-level details of any included *Plans*. The Broker may view *Quote Criteria* as well as, when ready, **Select Plan** and **Enroll** the client from this page.

Quote Number #73 Quoted

Plans Quote Criteria

Health & Drug Coverage

Care Core: M Health Fairview & North Memorial (HMO-POS)

\$44.00 Monthly Premium	\$0.00 Annual Deductible	\$5,000.00 Out of Pocket Max
-----------------------------------	------------------------------------	--

Primary Care Doctor Office Visits In Network Copay: \$0 copay
Specialty Office Visits In Network Copay: \$40 copay
Benefit Highlights Highlights: Annual physical: Yes; Dental: Yes; Eyewear: Yes; Hearing Aids: Yes; Hearing: Yes; Medicare Part D: Yes; Over-the-counter: Yes; Vision: Yes; Worldwide emergency care: Yes

View details Select Plan Enroll

Edit Contact/Client

The Broker may edit *Contact Details* by clicking **Edit** and then making updates to the information in the *Update Contact* window.

Fields that may be updated are:

- *First Name*
- *Last Name*
- *Email*
- *Phone*

When all changes have been made, click **Update**.

Edit Contact/Client

The Broker may make edits to client information by clicking **Edit Client Details**.

In the *Edit Client* window, these are the fields that may be updated:

- *First Name*
- *Last Name*
- *Email*
- *Phone Number*
- *Address (Lines 1 & 2)*
- *City*
- *State*
- *Zip*
- *County*

Once all edits have been made, click **Save**.

On the next page we begin focusing on functionality that is new in the Broker Portal being implemented October 2021. Since this functionality does not exist in the old version of the Broker Portal UCare, there is no comparison to be set side-by-side with images of the new system. Therefore, for the next several pages we will only be showing and discussing one version, the new UCare Broker Portal.

Medicare Quoting

Medicare Quoting allows Brokers to obtain a Medicare quote for Medicare Advantage, Medicare Supplement and Medicare Part D plans.

On the Workbench (Home page) of the Broker Portal there are several access points for the new Medicare Quoting functionality.

Create Medicare Quoting

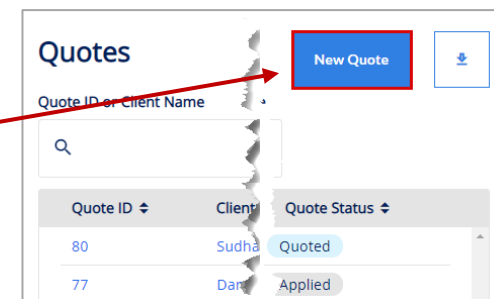
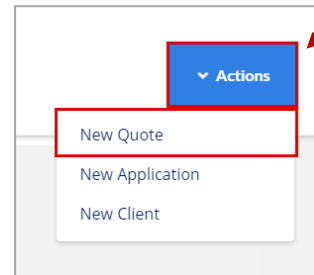
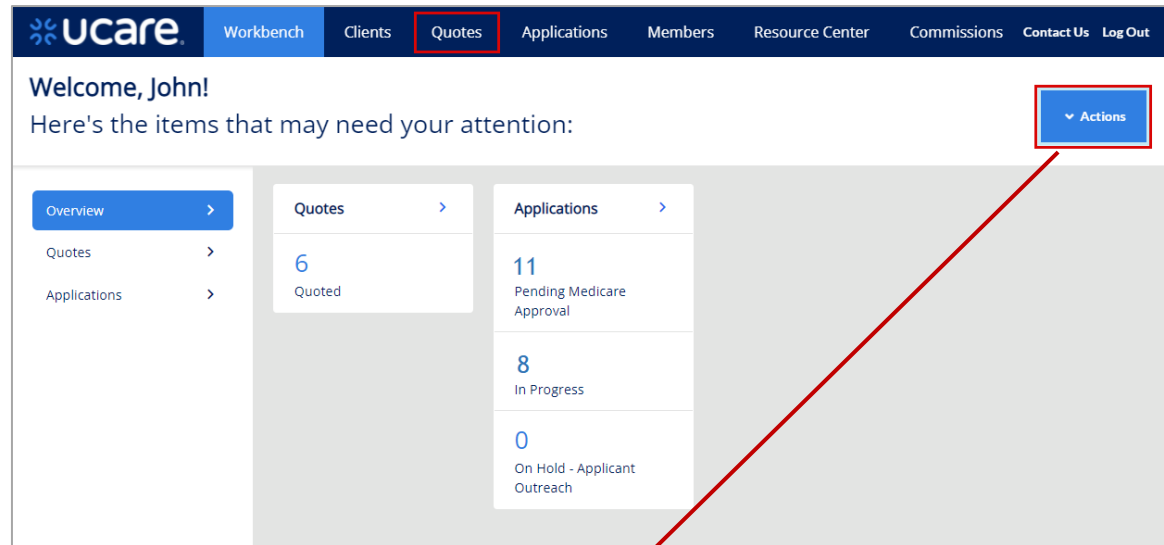
Brokers generate a new Medicare quote using the 'Create New Quote' feature.

The feature consists of the following workflow steps:

1. Medicare Shopping Home
2. Select Medicare Plans
3. Select Ancillary Plans (separate Dental plans)
4. Review Medicare Quote

From the Workbench, click the **Actions** button and choose **New Quote** to begin creating a new Medicare quote.

It is also possible to initiate a new quote from the Quotes page. Click the **New Quote** button to begin.



Medicare Shopping Home

This feature serves as the landing page of the Medicare Shopping Portal as well as the start of Quoting for Brokers.

Depending on a client's configuration, different features are available within this page.

This new quote tool simplifies how the Broker will present plan options to their clients.

To use the tool, the Broker follows these 3 steps:

1. Enter the clients **Zip Code, County** and **Coverage Effective Date**
2. Compare key benefits to the clients in a side-by-side format
3. Share plan information with their client

Ucare. Workbench Clients Quotes Applications Members Resource Center Commissions Contact Us Log Out

Let's Get Started. Be a de-complicator – use the quote tool to match clients needs with UCare health plans

- ✓ Fill in your client's zip code, county and coverage start date to see the plans available in their area
- ✓ Compare key benefits side-by-side
- ✓ Share plan information with your client

ZIP Code * County * Coverage Effective Date *

55406 Hennepin October 1, 2021

View Plans

Select Medicare Plans

Select Health Plans without Drug Coverage Tab

When the *View and Compare Health Plans* window first displays, the plans that are visible are those that include drug coverage.

To view plan options that do not include drug coverage, click the tab labeled **Health Plans without Drug Coverage**.

Select Health & Drug Coverage Tab

Once you have viewed the plan options that do not include drug coverage, you may wish to review plans that do include drug coverage.

Click the tab labeled **Health & Drug Coverage**.

View and Compare Health Plans

All our health plans (with or without drug coverage) bundle all Medicare health benefits plus extra services - like vision, hearing, dental, and more.

Note: health plans without drug coverage cannot be combined with a stand alone Part D plan.

Health & Drug Coverage **Health Plans without Drug Coverage 2**

UCare Value Plus (HMO-POS)

\$0.00	\$0.00	\$5,500.00
Monthly Premium	Annual Deductible	Out of Pocket Max

Primary Care Doctor Office Visits In Network Copay: \$0 copay
Specialty Office Visits In Network Copay: \$45 copay
Benefit Highlights Highlights: Annual physical: Yes; Dental: Yes; Eyewear: Yes; Hearing Aids: Yes; Hearing: Yes; Medicare Part D: No; Over-the-counter: Yes; Vision: Yes; Worldwide emergency care: Yes

View details Compare **Select Plan**

UCare Value (HMO-POS)

... ..

[Back](#) [Continue](#)

Compare Medicare Plans

This feature allows Brokers to review plans benefits side by side for comparison.

As noted in the section to *Compare*, up to 4 plans may be selected and compared.

To select a plan to be included in the comparison exercise, check the **box** labeled **Compare** in the plan details area.

By checking the boxes, the plans are added to the *Compare* panel. When the Broker is satisfied with their selections, they will click the box to **Compare Plans**.

NOTE: The comparison results can be sorted in one of four possible ways:

- Lowest Monthly Premium
- Lowest Deductible
- Plan Name A – Z
- Plan Name Z – A

Compare

Select up to 4 plans to compare

Compare

UCare Essentials Rx (HMO-POS) ×

UCare Complete (HMO-POS) ×

add plan to compare

add plan to compare

Compare Plans

Sort

Sort by

Lowest Monthly Premium

Lowest Deductible

Plan Name A - Z

Plan Name Z - A

Filters

UCare Essentials Rx (HMO-POS)

\$56.00	\$0.00	\$3,800.00
Monthly Premium	Annual Deductible	Out of Pocket Max

Primary Care Doctor Office Visits	In Network Copay: \$0 copay
Specialty Office Visits	In Network Copay: \$45 copay
Benefit Highlights	Highlights: Annual physical: Yes; Dental: Yes; Eyewear: Yes; Hearing Aids: Yes; Hearing: Yes; Medicare Part D: Yes; Over-the-counter: Yes; Vision: Yes; Worldwide emergency care: Yes

View details

Compare

Select Plan

UCare Complete (HMO-POS)

\$99.00	\$0.00	\$3,000.00
Monthly Premium	Annual Deductible	Out of Pocket Max

Primary Care Doctor Office Visits	In Network Copay: \$0 copay
Specialty Office Visits	In Network Copay: \$30 copay
Benefit Highlights	Highlights: Annual physical: Yes; Dental: Yes; Eyewear: Yes; Hearing Aids: Yes; Hearing: Yes; Medicare Part D: Yes; Over-the-counter: Yes; Vision: Yes; Worldwide emergency care: Yes

View details

Compare

Select Plan

Seeing the selected plans side by side is helpful in comparing things like costs for office and specialist visits, out of pocket maximum amounts, and dental, vision, and pharmacy coverage levels.

When finished examining and analyzing the plans, you may return to the previous page and see all plans by clicking **Back to All Plans**.

[← Back to All Plans](#)

Workbench Clients Quotes Applications Members Resource Center Commissions Contact Us Log Out			
← Back to All Plans			
	UCare Essentials Rx (HMO-POS) \$56	UCare Complete (HMO-POS) \$99	
Primary Care Doctor Office Visits	In Network Copay: \$0 copay	In Network Copay: \$0 copay	
Specialty Office Visits	In Network Copay: \$45 copay	In Network Copay: \$30 copay	
Benefit Highlights	Highlights: Annual physical: Yes; Dental: Yes; Eyewear: Yes; Hearing Aids: Yes; Hearing: Yes; Medicare Part D: Yes; Over-the-counter: Yes; Vision: Yes; Worldwide emergency care: Yes	Highlights: Annual physical: Yes; Dental: Yes; Eyewear: Yes; Hearing Aids: Yes; Hearing: Yes; Medicare Part D: Yes; Over-the-counter: Yes; Vision: Yes; Worldwide emergency care: Yes	
Urgent Care	In Network Copay: \$50 copay	In Network Copay: \$50 copay	
Ambulance	In Network Copay: \$250 copay	In Network Copay: \$275 copay	
Annual Physical	Routine Copay: \$0 copay	Routine Copay: \$0 copay	
Emergency Care	Emergency Care Copay: \$90 copay (waived if admitted within 24 hours)	Emergency Care Copay: \$90 copay (waived if admitted within 24 hours)	
Routine Hearing Exam	Routine Copay: 1 per year, \$0 copay	Routine Copay: 1 per year, \$0 copay	
Inpatient Hospital Care	In Network Copay: \$400 copay per stay (not per day), then 100% coverage	In Network Copay: \$125 copay per stay (not per day), then 100% coverage	
Lab Services	Copay/Coinsurance: \$0 copay	Copay/Coinsurance: \$0 copay	
Medicare Part D	Prescription Drug Coverage: Copays based on drug tiers	Prescription Drug Coverage: Copays based on drug tiers	
Primary Care Doctor Office Visits	In Network Copay: \$0 copay	In Network Copay: \$0 copay	
Skilled Nursing Facility	In Network Copay: \$0 copay per day (days 1 - 20), \$184 copay per day (days 21 - 100), no prior hospital stay required	In Network Copay: \$0 copay per day (days 1 - 20), \$184 copay per day (days 21 - 100), no prior hospital stay required	

After returning to the plans under review, if the Broker is ready to proceed, they click **Continue** to move to the next page.

UCare Value (HMO-POS)

\$29.00 Monthly Premium	\$0.00 Annual Deductible	\$3,400.00 Out of Pocket Max
-----------------------------------	------------------------------------	--

Primary Care Doctor Office Visits In Network Copay: \$0 copay
Specialty Office Visits In Network Copay: \$35 copay
Benefit Highlights Highlights: Annual physical: Yes; Dental: Yes; Eyewear: Yes; Hearing Aids: Yes; Hearing: Yes; Medicare Part D: No; Over-the-counter: Yes; Vision: Yes; Worldwide emergency care: Yes

View details Compare Selected

Showing 1-2 of 2 Results << < 1 / 1 > >>

Back You've selected **1** Health Plans without Drug Coverage Continue

Select Dental Plans

Brokers may review and select separate, *Comprehensive Dental* plans that can be added to the quote based on their Medicare plan selections

This step is an optional step within the Medicare quoting workflow and is only available if the carrier offers *Comprehensive Dental* plans that can be purchased alongside the Medicare plans selected in the preceding step.

When ready to move on, click **Continue**.

Add Dental Plans

Workbench
Clients
Quotes
Applications
Members
Resource Center
Commissions
Contact Us
Log Out

Comprehensive Dental

Select an optional comprehensive dental plan to enhance your health plan

Choice Dental

\$25.00 <small>Monthly Premium</small>	\$75.00 <small>Annual Deductible</small>	\$2,000.00 <small>Annual Plan Maximum</small>
--	--	---

Oral examinations	Dental: Two per year
Routine cleanings	Dental: Two per year
X-rays	Dental: Annual bitewing and full mouth every 5 years

∨ View details
Select Plan (Optional)

Classic Choice Dental

\$25.00 <small>Monthly Premium</small>	\$50.00 <small>Annual Deductible</small>	\$2,500.00 <small>Annual Plan Maximum</small>
--	--	---

Oral examinations	Dental: Two per year
Routine cleanings	Dental: Three per year
X-rays	Dental: Annual bitewing and full mouth every 5 years

∨ View details
Select Plan (Optional)

Showing 1-2 of 2 Results

 << < 1 / 1 > >>

Back
Continue

Latest update date: 10/4/2021

26

Review Medicare Quote

This feature allows Brokers to review the quote criteria used to generate the quote along with the Broker's plan selections.

From here, Brokers can save the quote, begin the enrollment process, or create a proposal.

In this example, click **Save Quote**.

Review Quote

Please review your quote before saving. You can find your saved quotes on your Workbench or under Quotes.

Quote Criteria ✎

ZIP Code 55407

County Hennepin

Requested Effective Date 10/01/2021

Plan Selected ✎

Classic Choice Dental 🗑️

\$25.00 <small>Monthly Premium</small>	\$50.00 <small>Annual Deductible</small>	\$2,500.00 <small>Annual Plan Maximum</small>
--	--	---

Oral examinations	Dental: Two per year
Routine cleanings	Dental: Three per year
X-rays	Dental: Annual bitewing and full mouth every 5 years

⌵ View details
Select for Enrollment

UCare Value (HMO-POS)

\$29.00 <small>Monthly Premium</small>	\$0.00 <small>Annual Deductible</small>	\$3,400.00 <small>Out of Pocket Max</small>
--	---	---


Primary Care Doctor Office Visits	In Network Copay: \$0 copay
Specialty Office Visits	In Network Copay: \$35 copay
Benefit Highlights	Highlights: Annual physical: Yes; Dental: Yes; Eyewear: Yes; Hearing Aids: Yes; Hearing: Yes; Medicare Part D: No; Over-the-counter: Yes; Vision: Yes; Worldwide emergency care: Yes

⌵ View details
Select for Enrollment

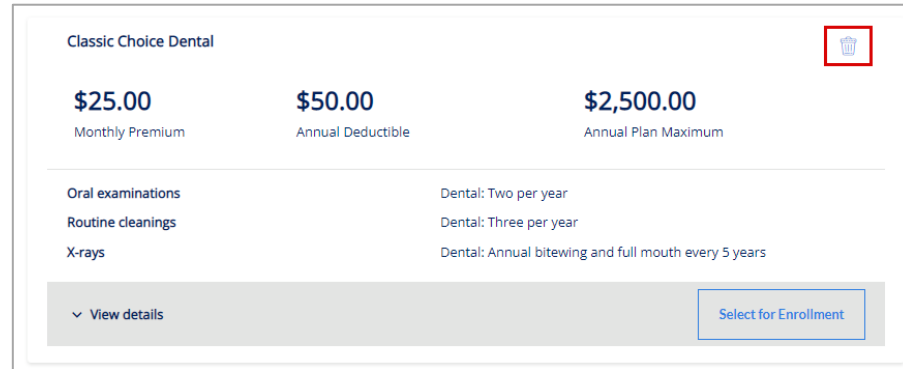
Back
Enroll
Save Quote


Remove Plan Confirmation

When a Broker tries to remove a plan from the quote, they will be asked to confirm their intent to remove the selected plan from their Medicare quote.

To remove one of the plans, click the **trash can icon**  .

When asked “Are you sure you want to remove this plan?” click either **Cancel** or **Remove** as is appropriate for your choice.

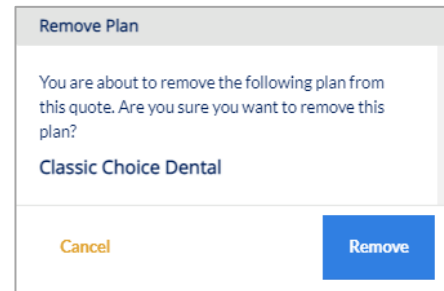


Classic Choice Dental 

\$25.00 Monthly Premium	\$50.00 Annual Deductible	\$2,500.00 Annual Plan Maximum
-----------------------------------	-------------------------------------	--

Oral examinations	Dental: Two per year
Routine cleanings	Dental: Three per year
X-rays	Dental: Annual bitewing and full mouth every 5 years

[View details](#) [Select for Enrollment](#)



Remove Plan

You are about to remove the following plan from this quote. Are you sure you want to remove this plan?

Classic Choice Dental

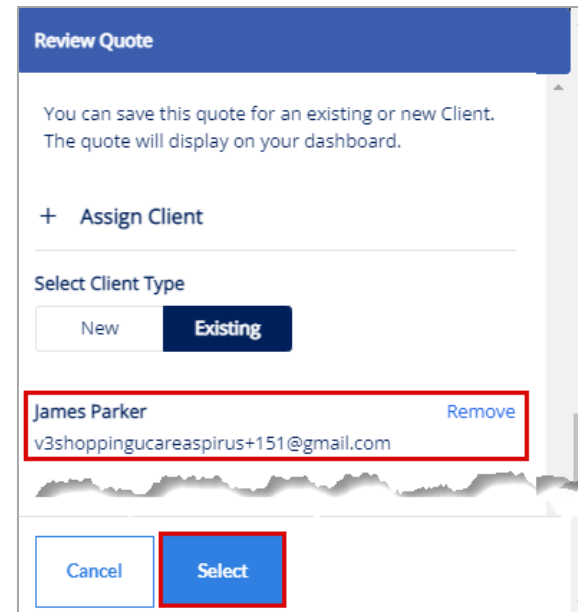
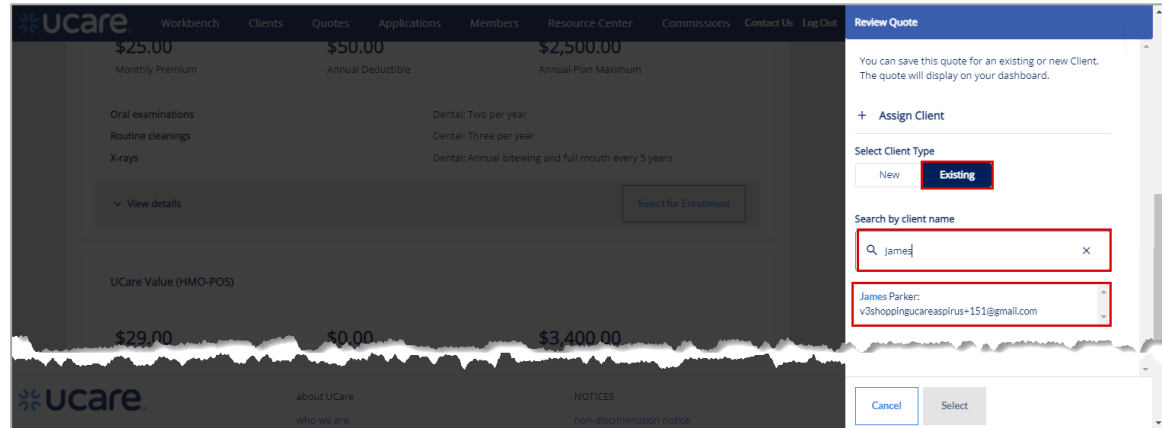
[Cancel](#) [Remove](#)

Assign Client

When saving the Quote, the Broker can either search for an existing Client and associate the quote to that person, or they can create a new Client to whom the quote will be associated.

Click the name of the client for whom you want to save this quote. Then click **Select**.

Search for the Client:



Create New Client

The Broker can create a new client at the time of reviewing and assigning a quote.

Create a New Client by clicking the **New** button under *Select Client Type*, and completing the information fields for the new client such as:

- *First Name*
- *Last Name*
- *Email*
- *Phone Number*
- *Address including City, State, Zip Code and County*

Click **Confirm** to create the new Client and assign this Quote to them.

The screenshot displays the 'Review Quote' page in the Ucare Broker Portal. The main content area shows quote criteria (ZIP Code: 55407, County: Hennepin, Requested Effective Date: 11/01/2021) and plan details for 'Classic Choice Dental' with a monthly premium of \$25.00, an annual deductible of \$50.00, and an annual plan maximum of \$2,500.00. Below the plan details are service frequency options for oral examinations, routine cleanings, and X-rays. A 'View details' button is visible at the bottom left of the plan section.

On the right side, a 'Review Quote' sidebar is open, showing a message: 'You can save this quote for an existing or new Client. The quote will display on your dashboard.' Below this is the '+ Assign Client' section. Under 'Select Client Type', the 'New' button is highlighted with a red box, while the 'Existing' button is not. The form fields for the new client are:

- First Name *: Thoemel
- Last Name *: Client
- Email Address *: tclient@email.com
- Phone Number *: 555-555-5555
- Address Line 1 *: 123456 Street St
- Address Line 2: (empty)

 At the bottom of the sidebar, there are 'Cancel' and 'Confirm' buttons. The 'Confirm' button is highlighted with a red box.

Save Quote Confirmation

You receive confirmation the quote has been saved.

You may view details of the quote by clicking *Quote Details*. You may also use the *Download Quote* button to download them to your device.

Manage Quotes

Quote Status

This table explains the statuses that are used to 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 affective date if no application has been submitted.
Applied	The user has selected plans and initiated an application.

Quotes List

The Broker can view a list of Quotes across all Clients on the *Quotes* list page.

They may search for a quote by entering the *Quote ID*, the *Client Name* and/or the *Requested Effective Date*.

It is also possible to filter the Quotes list by *Status*.

Quotes

Quote ID or Client Name: Status: Requested Effective Date:

Quote ID	Client Name	Products Quoted	Requested Effective Date	Date Created	Quote Status
81	Thoemel Client	Medicare Advantage Dental	11/01/2021	09/29/2021	Quoted
80	Sudha Gorrepati	MAPD	12/01/2021	09/28/2021	Quoted
77	Dan Miller	Medicare Advantage	10/01/2021	09/28/2021	Applied
76	Dan Miller	MAPD	12/01/2021	09/28/2021	Quoted
75	Dan Miller	MAPD	10/01/2021	09/28/2021	Applied
74	Dan Miller	MAPD	10/01/2021	09/28/2021	Quoted
73	James Parker	MAPD	10/01/2021	09/28/2021	Quoted
72	Sudha Gorrepati	MAPD	10/01/2021	09/28/2021	Quoted
71	James Parker	Medicare Advantage	11/01/2021	09/28/2021	Quoted
69	Sudha Gorrepati	Medicare Advantage	10/01/2021	09/28/2021	Applied

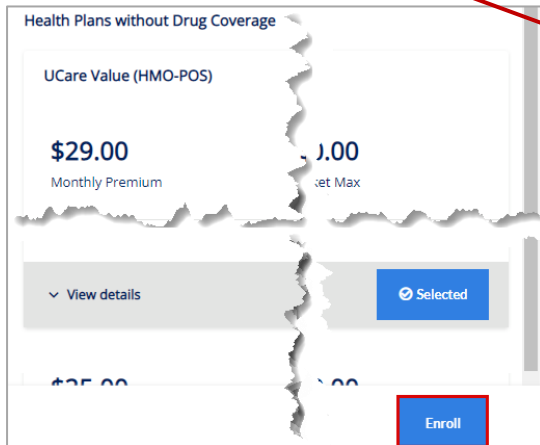
Showing 1 - 10 of 10

Quote Details

To view the details of a Quote, click the **Quote ID**.

It is possible to enroll the client in the plans included in this quote.

To enroll, the Broker clicks the **Select Plan button** for the desired plans. The **Enroll** button then becomes active.



The Broker clicks **Enroll** to finish signing the client up for these plans.

Quote ID	Client Name	Products Quoted	Requested Effective Date	Date Created	Quote Status
81	Thoemel Client	Medicare Advantage Dental	11/01/2021	09/29/2021	Quoted

This screenshot shows the Ucare Workbench interface for 'Quote Number #81'. The quote is in 'Quoted' status. The client is 'Thoemel Client' with email 'tclient@email.com' and phone '(555) 555-5555'. The requested effective date is 11/01/2021. The plan details for 'UCare Value (HMO-POS)' are shown: Monthly Premium \$29.00, Annual Deductible \$0.00, and Out of Pocket Max \$3,400.00. The 'Select Plan' button is highlighted in red.

Share Quote – Live and PDF

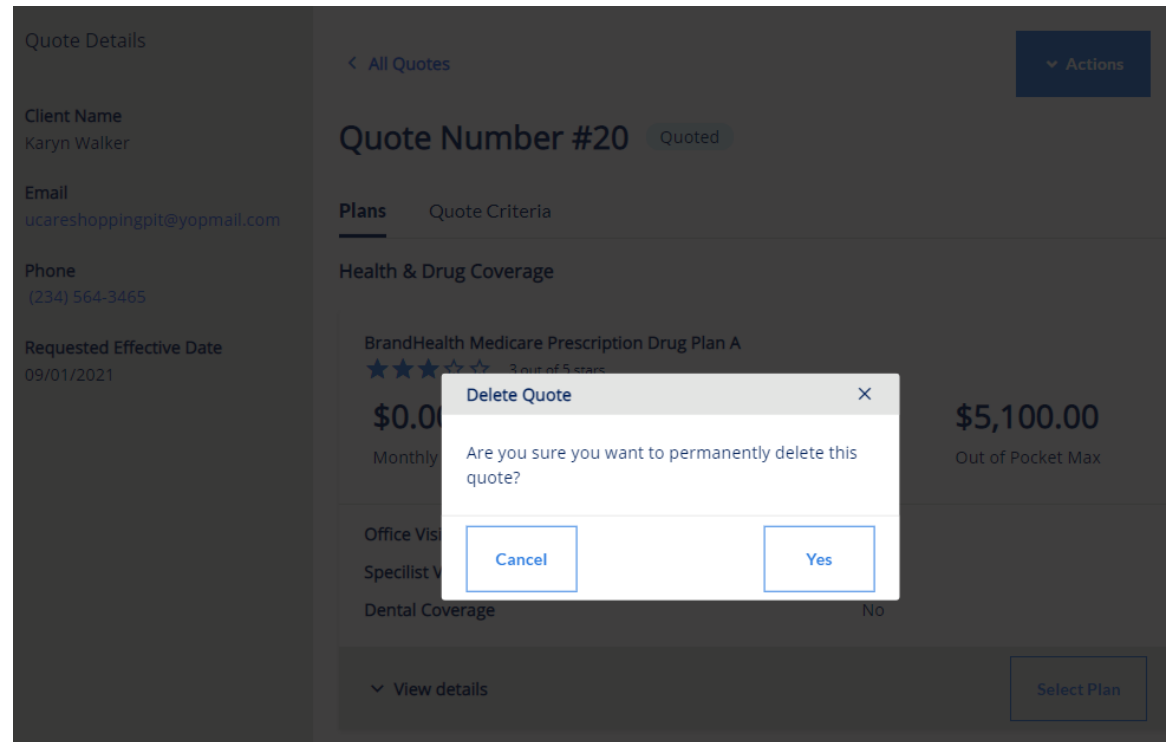
A Broker may share a Quote with a Client. The client is then able to login and view/edit that quote.

This feature is only available if both Shopping and Broker Portal have been purchased and are live in production.

Delete Quote Confirmation

When deleting a quote, the Broker will be asked to confirm they do, indeed wish to permanently delete a saved quote.

NOTE: Quotes can only be deleted when they are in an expired status.



On the next page we return to a side-by-side look that compares where to find information and how to employ functionality that exists in both the older Ucare Broker Portal and the new Broker Portal being implemented October 2021.

Current, Existing Broker Portal

Workflow Stepper

The workflow stepper tracks the steps of enrollment from *Eligibility Information* through *Complete*. The current step in the process displays in bold text.

The workflow stepper is situated to the left of the main workspace / interface in a vertical arrangement.

The screenshot shows the 'Eligibility Information' step of a Medicare enrollment process. On the left, a vertical list of steps is shown: 1. Eligibility Information (bolded and highlighted with a red box), 2. Subscriber Information, 3. Medicare Questions, 4. Choose Plan, 5. Choose Primary Care Clinic, 6. Choose Billing Method, 7. Review Enrollment, and 8. Complete. The main workspace contains a 'Coverage Effective Date*' dropdown menu, a question 'Is the contact also the subscriber?*' with 'YES' and 'NO' buttons, and 'Save & Exit' and 'Next' buttons. A 'Feedback' button is visible on the right side of the workspace.

New, Future Broker Portal

Workflow Stepper

The workflow stepper tracks the steps of creating or completing the application from *Applicant Information* through *Confirmation*. The current step in the process displays in bold text.

The workflow stepper is situated above the main workspace / interface in a horizontal arrangement.

The screenshot shows the 'Applicant Information' step of a new health plan application process. At the top, a horizontal list of steps is shown: Applicant Information (bolded and highlighted with a red box), Medicare Questions, Provider Search, PCC Search, Review Application, Sign and Complete, Payment Method, and Confirmation. The main workspace contains a 'Profile' section with a radio button for 'Self' (selected), and options for 'Legal Guardian' and 'Power of Attorney'. It also includes a 'Requested Effective Date*' field with a calendar icon showing '10/01/2021', a 'Prefix' field, and 'First Name' and 'Middle' fields with the name 'Riley' entered. 'Save & Exit' and 'Save & Continue' buttons are at the bottom right.

Current, Existing Broker Portal	New, Future Broker Portal

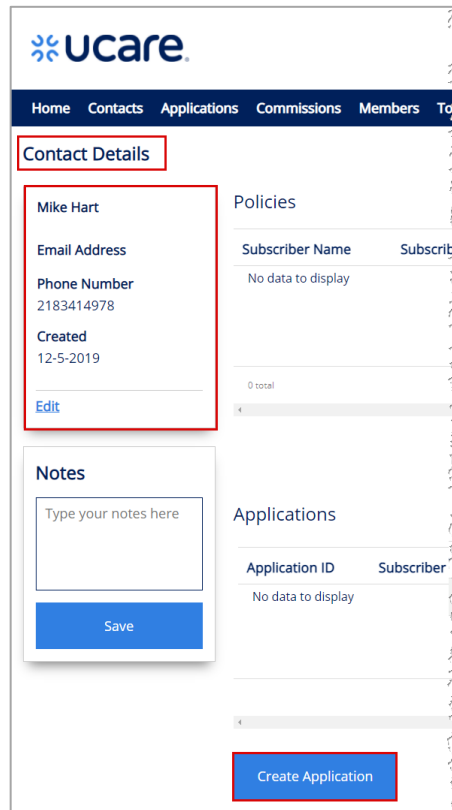
Medicare Applications

Create New Medicare Application

Start Applications

To start an application the Broker must begin with an existing Contact.

On the *Contact Details* page, click **Create Application**.



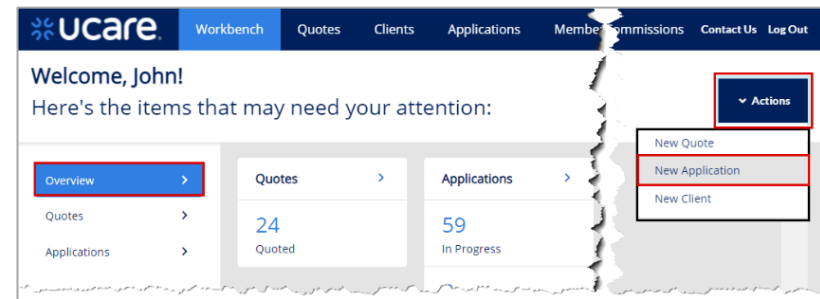
Medicare Applications

Create New Medicare Application

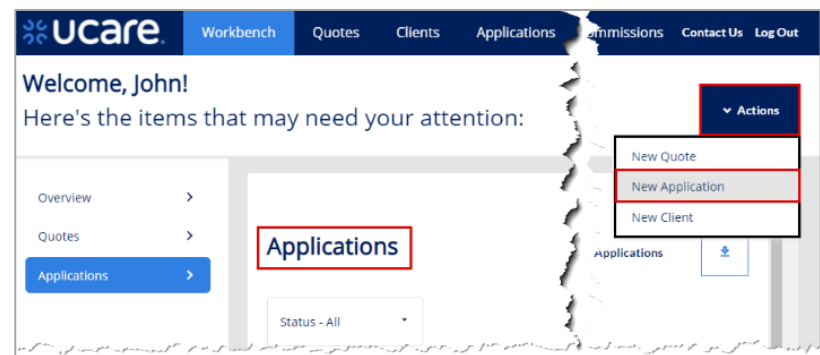
Start Applications (without Quote)

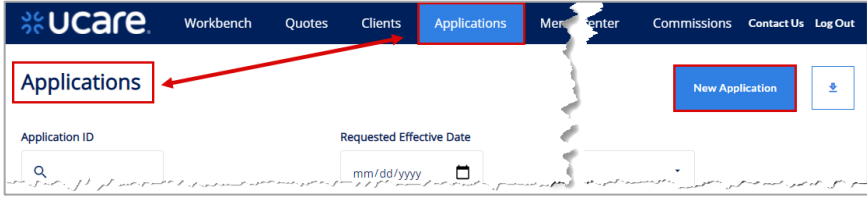
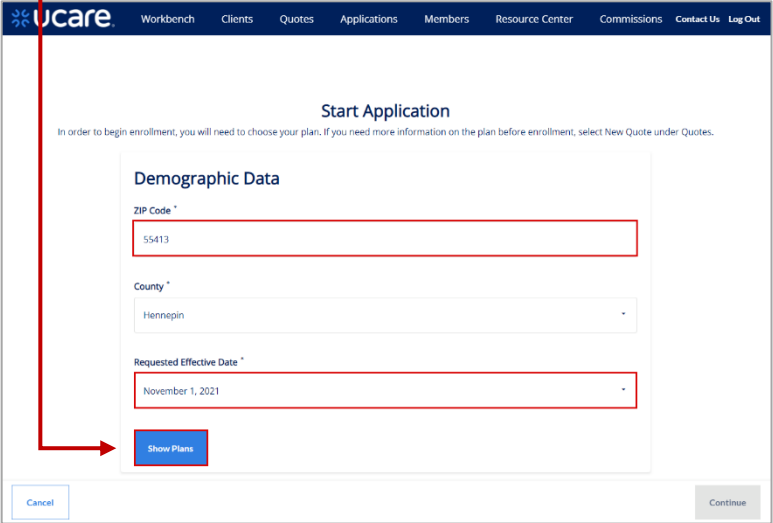
There are several ways to start an application, either associated to an existing Client, or not. The examples that follow show initiating the application without an associated client or quote.

The first method is from the *Overview* page of the *Workbench*, click **Actions**, then choose **New Application**.



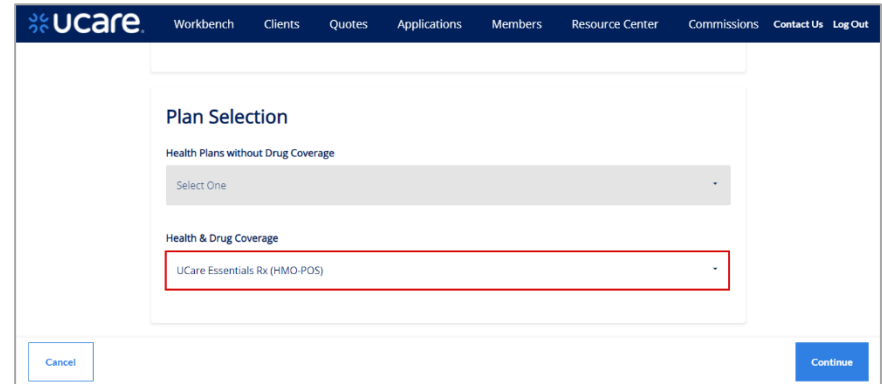
The second method is from the *Applications* page of the *Workbench*, click **Actions** then choose **New Application**.



Current, Existing Broker Portal	New, Future Broker Portal
	<p>The third method is to begin on the <i>Applications</i> page, then click the New Application button.</p> 
<p>Not currently used</p>	<p>On the <i>Start Application</i> page, enter ZIP Code, and Requested Effective Date (County will fill in from the corresponding ZIP Code). Click Show Plans.</p> 

Current, Existing Broker Portal

New, Future Broker Portal



The screenshot displays the 'Plan Selection' interface of the new Ucare Broker Portal. At the top, a navigation bar includes the Ucare logo and links for Workbench, Clients, Quotes, Applications, Members, Resource Center, Commissions, Contact Us, and Log Out. The main content area is titled 'Plan Selection' and contains two dropdown menus. The first dropdown, labeled 'Health Plans without Drug Coverage', has 'Select One' as its current selection. The second dropdown, labeled 'Health & Drug Coverage', has 'UCare Essentials Rx (HMO-POS)' selected and is highlighted with a red border. At the bottom of the form, there are 'Cancel' and 'Continue' buttons.

Current, Existing Broker Portal

You're Ready to Enroll
Not currently used

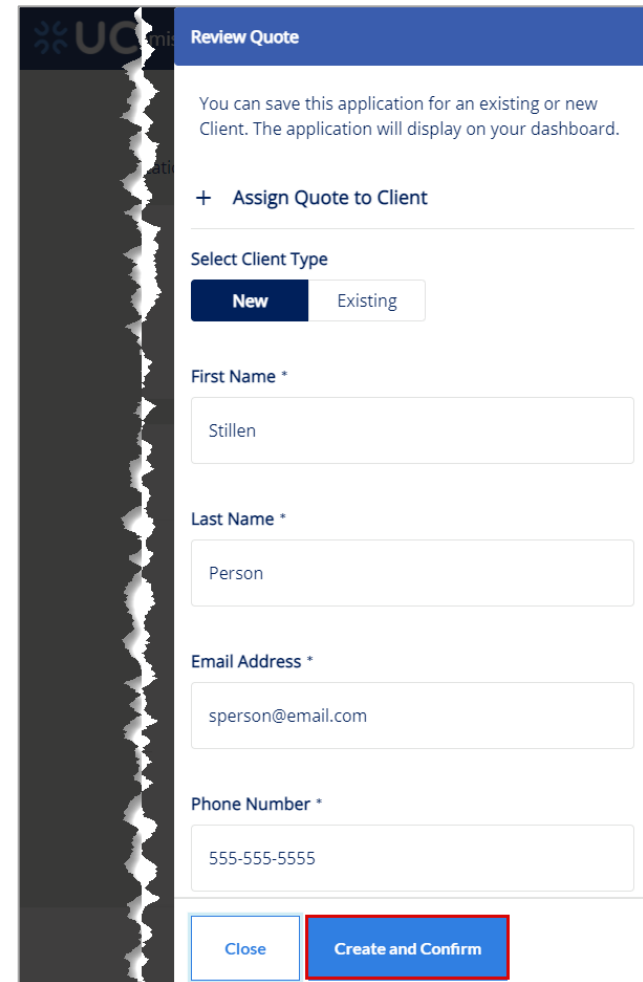
New, Future Broker Portal

You're Ready to Enroll

The screenshot shows the 'Ready to Enroll!' page in the Ucare portal. At the top is a navigation bar with links for Workbench, Clients, Quotes, Applications, Members, Resource Center, Commissions, Contact Us, and Log Out. The main heading is 'Ready to Enroll!' with a sub-heading: 'We will walk you through it every step of the way. Make sure you've selected the correct plan before starting your application'. Below this is a section titled 'How Do You Want To Apply?' with a radio button selected for 'Apply online'. The next section is 'Plan Selection(s)' featuring the 'UCare Essentials Rx (HMO-POS)' plan. Key financial details are displayed: Monthly Premium of \$56.00, Annual Deductible of \$0.00, and Out of Pocket Max of \$3,800.00. A table of benefits follows, including Primary Care Doctor Office Visits, Specialty Office Visits, and Benefit Highlights such as In Network Copay (\$0), Annual physical, Dental, Eyewear, Hearing Aids, Medicare Part D, and Worldwide emergency care. A 'View details' link is at the bottom of the plan card. At the very bottom of the page are 'Back' and 'Start Application' buttons.

Current, Existing Broker Portal

New, Future Broker Portal



Review Quote

You can save this application for an existing or new Client. The application will display on your dashboard.

+ Assign Quote to Client

Select Client Type

First Name *

Last Name *

Email Address *

Phone Number *

Before You Start
Not currently used

Before You Start

Current, Existing Broker Portal	New, Future Broker Portal
Medicare Advantage	Medicare Advantage

Current, Existing Broker Portal

Medicare Eligibility

The screenshot shows the 'Medicare Eligibility' form in the current portal. At the top left is the 'ucare' logo, and at the top right are 'Change Roles' and 'Logout' buttons. Below this is a navigation bar with links: Home, Contacts, Applications, Commissions, Members, Tools & Resources, and Need Help. The main content area is titled 'MEDICARE ENROLLMENT Eligibility Information'. On the left is a 'Contact' sidebar for Jimmy Testor (763) 555-5669, agent1ucare@gmail.com, with a progress list: 1 Eligibility Information (selected), 2 Subscriber Information, 3 Medicare Questions, 4 Choose Plan, 5 Choose Primary Care Clinic, 6 Choose Billing Method, 7 Review Enrollment, and 8 Complete. The main form has a 'Coverage Effective Date*' dropdown menu set to '11/1/2021'. Below this is a question 'Is the contact also the subscriber?*' with 'YES' and 'NO' radio buttons. At the bottom right are 'Save & Exit' and 'Next' buttons.

New, Future Broker Portal

Medicare Eligibility

Current, Existing Broker Portal

Applicant Information

The current portal form is titled "MEDICARE ENROLLMENT Subscriber Information". It features a left-hand navigation menu with steps: 1. Eligibility Information, 2. Subscriber Information (active), 3. Medicare Questions, 4. Choose Plan, 5. Choose Primary Care Clinic, 6. Choose Billing Method, 7. Review Enrollment, and 8. Complete. The form fields include: Title (Please Select), First Name* (Abby), Last Name* (Appic), Middle Initial, Date of Birth* (02/10/1975), Primary Language (Please Select), Medicare Number, Gender* (M, F), Race, City* (Plainwood), State* (MN), Zip Code* (55104), and County* (24610). Navigation buttons at the bottom include "back", "Save & Exit", and "Next: Enroll at this time".

New, Future Broker Portal

Applicant Information

The new portal form is titled "Applicant Information" with the subtext "To enroll your client into a new health plan, we need just a little more information." It features a top navigation bar with links: Workbench, Clients, Quotes, Applications, Members, Resource Center, Commissions, Contact Us, and Log Out. A progress bar shows steps: 1. Applicant Information (active), 2. Medicare Questions, 3. Primary Care Clinic, 4. Payment Method, 5. Review Application, 6. Sign and Complete, and 7. Co. The main form area is titled "Profile" and includes: "What is your relationship to the enrollee?" with radio buttons for Self (selected), Legal Guardian, and Power of Attorney; "Requested Effective Date*" with a date picker set to 11/01/2021; "Prefix" with a dropdown; and "First Name*" and "Middle" fields. Navigation buttons at the bottom right are "Save & Exit" and "Save & Continue".

You must read this information before you enroll in UCare Medicare, EssentiaCare, or UCare Medicare with M Health Fairview & North Memorial Health:

- UCare Minnesota is an HMO-POS plan with a Medicare contract. Enrollment in UCare Minnesota depends on contract renewal.
- EssentiaCare is a PPO plan with a Medicare contract. Enrollment in EssentiaCare depends on contract renewal.
- UCare Health, Inc. is an HMO-POS plan with a Medicare contract. Enrollment in UCare Health depends on contract renewal.
- Out-of-network/non-contracted providers are under no obligation to treat UCare Medicare, EssentiaCare and UCare Medicare with M Health Fairview & North Memorial Health members, except in emergency situations. Please call our customer service number or see your Evidence of Coverage for more information, including the cost-sharing that applies to out-of-network services.
- Medicare beneficiaries may also enroll in UCare Medicare, EssentiaCare and UCare Medicare with M Health Fairview & North Memorial Health through the CMS Medicare Online Enrollment Center located at <http://www.medicare.gov/> (external site).
- You must continue to pay your Medicare Part B premium.
- This information is not a complete description of benefits. Please call UCare Medicare, or UCare Medicare with M Health Fairview & North Memorial Health at 1-877-523-1518, or EssentiaCare at 1-855-432-7027 toll free, TTY users should call 1-800-688-2534 toll free for more information.
- This information is available in alternate formats or languages. Please call UCare Medicare, or UCare Medicare with M Health Fairview & North Memorial Health at 1-877-523-1518, or EssentiaCare at 1-855-432-7027 toll free, TTY users should call 1-800-688-2534 toll free to request this information in other formats or languages.

SELECTED PLAN

UCare Essentials Rx (HMO-POS) \$56.00

CLEAR

Back

Save & Exit

Next

Important Questions

Contact
Abby Apple
pgriparr+4121@gmail.com

- Eligibility Information
- Subscriber Information
- Medicare Questions**
- Choose Plan
- Choose Primary Care Clinic
- Choose Billing Method
- Review Enrollment
- Complete

MEDICARE ENROLLMENT
Medicare Questionnaire

Answering the below questions will not affect your ability or eligibility to join our plan.

Other than Medicare, will you continue to have any other medical coverage?*

YES NO

Will you have other prescription drug coverage?*

YES NO

Is our plan a new option for you because you moved in the past three months?*

YES NO

Are you a resident in a nursing home?*

YES NO

Or, are you a resident of an assisted living or memory care facility who is receiving nursing home level of care?*

Are you losing or leaving coverage you had from an employer or union, or did you recently lose or leave such coverage (includes COBRA and/or retiree coverage)?*

YES NO

If yes, what is the last date of coverage?*

Are you enrolled in a Medicare plan that is ending its Medicare contract or choosing to make a change during the MA Open Enrollment Period (Jan. 1 - March 31)?*

YES NO

Important Questions

- Workbench
- Clients
- Quotes
- Applications
- Members
- Resource Center
- Commissions
- Contact Us
- Log Out

Applicant Information **Medicare Questions** Primary Care Clinic Payment Method Review Application Sign and Complete Co

Medicare Questions

These questions help identify the types of care you need and clarifies your eligibility status.

Answering the below questions will not affect your ability or eligibility to join our plan.

Other than Medicare, will you continue to have any other medical coverage? *

Yes No

Will you have other prescription drug coverage? *

Yes No

Is our plan a new option for you because you moved in the past three months? *

Yes No

Are you a resident in a nursing home? *

Yes No

Or, are you a resident of an assisted living or memory care facility who is receiving nursing home level of care? *

Current, Existing Broker Portal

New, Future Broker Portal

The screenshot displays the 'MEDICARE ENROLLMENT Choose Plan' page. On the left, there is a contact sidebar for Jimmy Testor and a progress indicator with steps: Eligibility Information, Subscriber Information, Medicare Questions, Choose Plan (active), Choose Primary Care Clinic, Choose Billing Method, Review Enrollment, and Complete. The main content area includes a search bar for plan names, filters for Monthly Premium (\$0 to \$350) and Max Out of Pocket (\$1,000 to \$7,000), and a list of plan options. Two plans are visible: 'UCare Prime (HMO-POS)' with a \$0.00 monthly premium and 'UCare Essentials Rx (HMO-POS)' with a \$56.00 monthly premium. The second plan is marked as 'Selected'.

Current, Existing Broker Portal	New, Future Broker Portal
<p>You must read this information before you enroll in UCare Medicare, EssentiaCare, or UCare Medicare with M Health Fairview & North Memorial Health:</p> <ul style="list-style-type: none"> • UCare Minnesota is an HMO-POS plan with a Medicare contract. Enrollment in UCare Minnesota depends on contract renewal. • EssentiaCare is a PPO plan with a Medicare contract. Enrollment in EssentiaCare depends on contract renewal. • UCare Health, Inc. is an HMO-POS plan with a Medicare contract. Enrollment in UCare Health depends on contract renewal. • Out-of-network/non-contracted providers are under no obligation to treat UCare Medicare, EssentiaCare and UCare Medicare with M Health Fairview & North Memorial Health members, except in emergency situations. Please call our customer service number or see your Evidence of Coverage for more information, including the cost-sharing that applies to out-of-network services. • Medicare beneficiaries may also enroll in UCare Medicare, EssentiaCare and UCare Medicare with M Health Fairview & North Memorial Health through the CMS Medicare Online Enrollment Center located at http://www.medicare.gov/ (external site). • You must continue to pay your Medicare Part B premium. • This information is not a complete description of benefits. Please call UCare Medicare, or UCare Medicare with M Health Fairview & North Memorial Health at 1-877-523-1518, or EssentiaCare at 1-855-432-7027 toll free, TTY users should call 1-800-688-2534 toll free for more information. • This information is available in alternate formats or languages. Please call UCare Medicare, or UCare Medicare with M Health Fairview & North Memorial Health at 1-877-523-1518, or EssentiaCare at 1-855-432-7027 toll free, TTY users should call 1-800-688-2534 toll free to request this information in other formats or languages. <div data-bbox="201 1109 1026 1206" style="border: 1px solid black; padding: 5px;"> <p>SELECTED PLAN</p> <p>UCare Essentials Rx (HMO-POS) + Choice Dental \$81.00 CLEAR</p> </div> <div data-bbox="764 1276 1026 1336" style="display: flex; justify-content: flex-end; gap: 10px;"> Save & Exit Next </div>	

Current, Existing Broker Portal	New, Future Broker Portal

Preferred Provider Selection

Preferred Provider Selection

Payment Information

Contact
Jimmy Testor
(763) 555-5669
agent1ucare@gmail.com

Eligibility Information
 Subscriber Information
 Medicare Questions
 Choose Plan
 Choose Primary Care Clinic
 6 Choose Billing Method
 7 Review Enrollment
 8 Complete

MEDICARE ENROLLMENT
Choose Billing Method

Your premium plan options:

You can choose to pay your premium (including any late enrollment penalty that you currently have or may owe) in the following ways. Choose one of the options below.

I choose monthly billing (you will receive a paper bill each month).
 I choose monthly Electronic Funds Transfer (EFT from a checking or savings account).
 I choose automatic deduction from my monthly Social Security Administration (SSA) or Railroad Retirement Board (RRB) benefit check. The deduction may take two or more months to begin. In most cases, the first deduction from your benefit check will include all premiums due from your enrollment effective date up to the point withholding begins. If SSA or RRB does not approve your request for automatic deductions, we will send you a paper bill for your monthly premiums.

Note: We are not able to accept credit or debit cards.

If you do not select a payment option, you will get a bill each month. If you are assessed a Part D Income Related Monthly Adjustment Amount (IRMAA), you will be notified by the Social Security Administration. You will be responsible for paying this extra amount in addition to your plan premium. You will either have the amount withheld from you SSA benefit check or be billed directly by Medicare or the RRB. DO NOT pay Ucare the Part D-IRMAA.

Payment Information

This feature requires Brokers to indicate how they would like to pay their monthly premiums.

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Applicant Information
 Medicare Questions
 Primary Care Clinic
 4 Payment Method
 Review Application
 Sign and Complete
 Co

Make a Payment

You can choose to pay your premium (including any late enrollment penalty that you currently have or may owe) in the following ways (please select one). If you are assessed a Part D Income Related Monthly Adjustment Amount (IRMAA), you will be notified by the Social Security Administration. You will be responsible for paying this extra amount in addition to your plan premium. You will either have the amount withheld from you SSA benefit check or be billed directly by Medicare or the RRB. DO NOT pay Ucare the Part D-IRMAA.

Summary	
UCare Essentials Rx (HMO-POS)	\$56.00
Total Monthly Premium	\$56.00

Payment Method

Allowable Payment Methods

Electronic Funds Transfer (EFT)
 Monthly Billing
 Social Security Administration (SSA) benefit deduction
 Railroad Retirement Board (RRB) benefit deduction

You will receive a paper bill each month that you can choose to pay by mail, phone or via credit/debit card through the online member portal.

Review Application

Change Roles Logout

[Home](#) [Contacts](#) [Applications](#) [Commissions](#) [Members](#) [Tools & Resources](#) [Need Help](#)

Contact
Jimmy Testor
(763) 555-5669
agent@ucare@gmail.com

- Eligibility Information
- Subscriber Information
- Medicare Questions
- Choose Plan
- Choose Primary Care Clinic
- Choose Billing Method
- Review Enrollment**
- Complete

MEDICARE ENROLLMENT
Review Enrollment

-
-
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Attestation

By completing this enrollment form, I agree to the following: UCare Medicare, EssentialCare and UCare Medicare with Fairview & North Memorial Health are Medicare Advantage plans and have a contract with the federal government. I will need to keep my Medicare Part A and Part B. I can only be in one Medicare Advantage plan at a time and I understand that my enrollment in this plan will automatically end my enrollment in another Medicare health plan or prescription drug plan. It is my responsibility to inform you of any prescription drug coverage that I have or may get in the future. I understand that if I don't have Medicare prescription drug coverage, or creditable prescription drug coverage (as good as Medicare), I may have to pay a late enrollment penalty if I enroll in Medicare prescription drug coverage in the future. Enrollment in this plan is generally for the entire year. Once I enroll, I may leave this plan or make changes only on certain dates of the year when an enrollment period is available (e.g., October 15 - December 7 of every year) or under certain special circumstances.

UCare Medicare, EssentialCare and UCare Medicare with Fairview & North Memorial Health serves a specific service area. If I move out of the area that UCare Medicare, EssentialCare and UCare Medicare with Fairview & North Memorial Health serves, I need to notify the plan so I can dis enroll and find a new plan in my new area. Once I am a member of UCare Medicare, EssentialCare and UCare Medicare with Fairview & North Memorial Health, I have the right to appeal plan decisions about premium or services if I disagree. I will keep the Evidence of Coverage document from UCare Medicare, EssentialCare and UCare Medicare with Fairview & North Memorial Health when I go to know which rules I must follow to get coverage with this Medicare Advantage plan. I understand that people with Medicare aren't usually covered under Medicare when out of the country except for limited coverage when the U.S. traveler. However, Medicare includes worldwide emergency care.

Electronic signature (self or authorized representative only)

I, the enrollee, agree to be a member of UCare Essentials Rx (HMO-POS) *

Back
Save & Exit
Submit

Review Application

Workbench Clients Quotes Applications Members Resource Center Commissions Contact Us Log Out

Applicant Information Medicare Questions Primary Care Clinic Payment Method Review Application Sign and Complete

Please Review Your Application

Plan Selection

UCare Essentials Rx (HMO-POS)

\$56.00	\$0.00	\$3,800.00
Monthly Premium	Annual Deductible	Out of Pocket Max

Primary Care Doctor Office Visits In Network Copay: \$0 copay
Specialty Office Visits In Network Copay: \$15 copay
Benefit Plan Year: 1/1/2021 - 12/31/2021 Annual Renewal Cycle

[View details](#)

Applicant Information

Profile

What is your relationship to the enrollee?
Requested Effective Date: 11/01/2021

Prefix
First Name:
Last Name:
Primary Phone Number:
Secondary Phone Number:

Medicare Information

Medicare Number:

Medicare Questions

Other than Medicare, will you continue to have any other medical coverage?

Will you have other prescription drug coverage?

Are you currently enrolled in a Medicare contract or choosing to make a change during the MA Open Enrollment Period (Jan. 1 - March 31)?

Payment

Summary

UCare Essentials Rx (HMO-POS)	\$56.00
Total Monthly Premium	\$56.00

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Save & Exit
Save & Continue

Authorization & Signature

Attestation

By completing this enrollment form, I agree to the following: UCare Medicare, EssentiaCare and UCare Medicare with Fairview & North Memorial Health are Medicare Advantage plans and have a contract with the Federal government. I will need to keep my Medicare Part A and Part B. I can only be in one Medicare Advantage plan at a time and I understand that my enrollment in this plan will automatically end my enrollment in another Medicare health plan or prescription drug plan. It is my responsibility to inform you of any prescription drug coverage that I have or may get in the future. I understand that if I don't have Medicare prescription drug coverage, or creditable prescription drug coverage (as good as Medicare's), I may have to pay a late enrollment penalty if I enroll in Medicare prescription drug coverage in the future. Enrollment in this plan is generally for the entire year. Once I enroll, I may leave this plan or make changes only at certain times of the year when an enrollment period is available (e.g., October 15 - December 7 of every year), or under certain special circumstances.

UCare Medicare, EssentiaCare and UCare Medicare with Fairview & North Memorial Health serves a specific service area. If I move out of the area that UCare Medicare, EssentiaCare and UCare Medicare with Fairview & North Memorial Health serves, I need to notify the plan so I can disenroll and find a new plan in my new area. Once I am a member of UCare Medicare, EssentiaCare and UCare Medicare with Fairview & North Memorial Health, I have the right to appeal plan decisions about payment or services if I disagree. I will read the Evidence of Coverage document from UCare Medicare, EssentiaCare and UCare Medicare with Fairview & North Memorial Health when I get it to know which rules I must follow to get coverage with this Medicare Advantage plan. I understand that people with Medicare aren't usually covered under Medicare while out of the country (even for limited trips) near the U.S. border. However, this plan provides worldwide emergency care.

Electronic signature (self or authorized representative only)

I, the enrollee, agree to be a member of UCare Essentials Rx (HMO-POS) *

[Back](#) [Save & Exit](#) [Submit](#)

Authorization & Signature

Ucare Workbench Clients Quotes Applications Members Resource Center Commitments Contact Us Log Out

Applicant Information Medicare Questions Primary Care Clinic Payment Method Review Application Sign and Complete Co

Attestation

Please review the following attestation and sign to complete your application

Authorization for Release of Information

By completing this enrollment form, I agree to the following:

UCare Medicare, EssentiaCare and UCare Medicare with Fairview & North Memorial Health are Medicare Advantage plans and have a contract with the Federal government. I will need to keep my Medicare Part A and Part B. I can only be in one Medicare Advantage plan at a time and I understand that my enrollment in this plan will automatically end my enrollment in another Medicare health plan or prescription drug plan. It is my responsibility to inform you of any prescription drug coverage that I have or may get in the future. I understand that if I don't have Medicare prescription drug coverage, or creditable prescription drug coverage (as good as Medicare's), I may have to pay a late enrollment penalty if I enroll in Medicare prescription drug coverage in the future. Enrollment in this plan is generally for the entire year. Once I enroll, I may leave this plan or make changes only at certain times of the year when an enrollment period is available (e.g., October 15 - December 7 of every year), or under certain special circumstances.

UCare Medicare, EssentiaCare and UCare Medicare with Fairview & North Memorial Health serves a specific service area. If I move out of the area that UCare Medicare, EssentiaCare and UCare Medicare with Fairview & North Memorial Health serves, I need to notify the plan so I can disenroll and find a new plan in my new area.

Please upload the Scope of Appointment document. If submitting the application on behalf of a Power of Attorney or Legal Guardian, please upload a POA agreement or other legal document.

Scope of Appointment [+](#)

Power of Attorney or other legal document [+](#)

Electronic Signature

First name *

Last name *

Signature Date

I verify that this is my electronic signature made with the intent to sign this application.

Send applicant a confirmation email

[Back](#) [Save & Exit](#) [Save & Continue](#)

Current, Existing Broker Portal

New, Future Broker Portal

The screenshot displays the Ucare Broker Portal interface. At the top, a dark blue navigation bar contains the Ucare logo and menu items: Workbench, Clients, Quotes, Applications, Members, Resource Center, Commissions, Contact Us, and Log Out. The main content area has a light gray background and features a central heading: "Your Application Was Successfully Submitted". Below this heading is a sub-message: "You will receive updates to keep you informed. In the meantime, you can always check the application status by logging into your account." The page contains four data cards in a row, each with an icon and text: "2045686 Application ID" (ID card icon), "11/01/2021 Requested Effective Date" (clock icon), "Stilen Person Subscriber" (person icon), and "Submitted Status" (checklist icon). Below these cards is a white box with a heart icon and the text "UCare Essentials Rx (HMO-POS) Submitted Plans". At the bottom right, there are two buttons: "Print Application" and "Client Details".

Resource Center

Change Roles Logout

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Tools and Resources - UCare

Documents

Plan Documents

Member Documents

Broker Marketing Tools

UCare Broker Information

Resources

- [Search Tool](#)
- [2021 Prescription Drug Calculator](#)
- [Order UCare Materials](#)
- [Customize Print on Demand Materials - Click on Brokers](#)
- [Broker Portal - Overview](#)
- [Broker Portal - How to compare, select, and enroll Medicare plans online](#)
- [Broker Portal FAQ](#)
- [Broker Buzz newsletter](#)
- [Subscribe to the Broker Buzz newsletter](#)
- [Social Security Administration](#)
- [Medicare.gov](#)
- [CMS.gov](#)

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Resource Center

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Resource Center

Folder	Description
Plan Materials	Includes SBCs, Provider Directories, Drug Formularies, and other plan related materials.
Enrollment Materials	Includes applications, supplemental documents, waivers, and other enrollment related materials.
Agent Materials	Includes documents related to appointment and compensation.
Marketing Materials	Includes marketing communications about Items such as value add benefits and services and special events

Showing 1 - 4 of 4

Policies List

Is this the Members list? Or Applications with an Enrolled status?

Members List

This feature allows the Broker to view a list of their associated policies.

Policies

Policy ID: Subscriber Name: Product Type: Status:

Policy	Subscriber Name	Product Type	Eff. Date	Status
840939	Amber Morioka	Medical	10/01/2018	Active
284744	Jimmy Hogan	Medical	11/06/2019	Active
760006	Ethel Lindsey	Medical	01/10/2019	Active
692857	Ora Vargas	Dental	10/28/2019	Active
976934	Lilly Sutton	Medical	06/20/2019	Active
310196	Elsie Perkins	Dental	09/10/2019	Active
135742	Janie Powell	Medical	09/04/2019	Active
580216	Ada Romero	Dental	02/26/2019	Active
249421	Corey Sandoval	Dental	11/02/2019	Active

Showing 1 - 10 of 100 Policies Rows Per Page: 10 << < 1/10 > >>

Current, Existing Broker Portal	New, Future Broker Portal

Policy Details

Policy Details

This feature allows the Broker to view the details of a specific policy.

Plan information:

Benefits information:

The screenshot shows the 'brand health solutions' interface. The top navigation bar includes 'Workbench', 'Clients', 'Leads', 'Quotes', 'Applications', 'Policies', and 'Tools'. The main content area is titled 'Policies' and shows 'Policy #840939' with an 'Active' status. A 'Plans' tab is selected, and a 'Benefits' sub-tab is highlighted with a red box. The benefits table is as follows:

Benefit	In Network	Out of Network
Annual Deductible	\$300.00 Individual \$600.00 Family	\$300.00 Individual \$600.00 Family
Annual Out of Pocket Maximum	\$5,000.00 Individual \$10,000.00 Family	N/A
Emergency Room Visits	You pay \$35.00 (no deductible applies)	You pay \$35.00 (no deductible applies)
Hospitalizations	You pay nothing after deductible	You pay 30% after deductible
Office Visits	PCP: \$20.00 Specialist: \$50.00	You pay 30% after deductible
Outpatient Surgery	You pay nothing after deductible	You pay 30% after deductible
Preventative Care	You pay nothing after deductible	You pay 30% after deductible

Current, Existing Broker Portal	New, Future Broker Portal

Commissions

Period	Amnt
Year: 2021	\$8,498.00
Q3 - July	\$2,782.00
Q2 - March	\$3,134.00
Q1 - January	\$2,582.00
Year: 2020	\$19,224.67
Year: 2019	\$19,312.00

Payment Period	Amount Paid	Member First Name	Member Last Name	Payment Type	Member #
Q3 - July	\$55.00	MARK	AFFELDT	2021 Q3 RENEWAL	3267612
Q3 - July	\$67.50	LAVERN	ANDERSON	2021 Q3 RENEWAL	3159956
Q3 - July	\$67.50	LOIS	ANDERSON	2021 Q3 RENEWAL	3159944
Q3 - July	\$67.50	BARBARA	ARETZ	2021 Q3 RENEWAL	4039106
Q3 - July	\$60.00	DENNIS	BIRNSTIHL	2021 Q3 RENEWAL	4035833

Commissions

The Commissions Report allows Brokers to review a list of their commission statements and access their details.

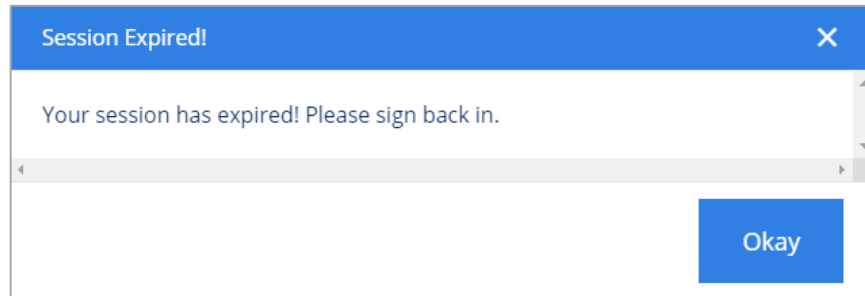
Report Name	Creation Date	Market Segment	Agency ID	Agency Name
Commission Report - Mar 2020	04/01/2020	Group	940385722	-
Commission Report - Feb 2020	03/01/2020	Ind & Family	447273285	-
Commission Report - Jan 2020	02/01/2020	Group	235758344	-
Commission Report - Dec 2020	01/01/2020	Medicare	246447574	-
Commission Report - Nov 2020	12/01/2020	Ind & Family	855427545	-
Commission Report - Oct 2020	11/01/2020	Group	224788542	-
Commission Report - Sep 2020	10/01/2020	Ind & Family	111774743	-
Commission Report - Aug 2020	09/01/2020	Group	275437889	-

Current, Existing Broker Portal	New, Future Broker Portal

Current, Existing Broker Portal

Session Inactivity

Brokers are logged out after a period of inactivity. There is no warning other than this message which indicates your session has expired.

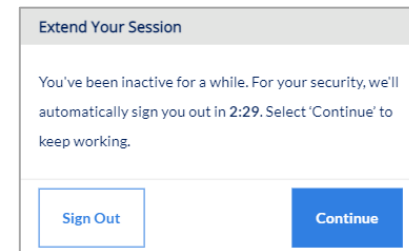


New, Future Broker Portal

Session Inactivity

Brokers will automatically be logged out of the Portal during an inactive session.

A warning that you are about to be logged out displays giving you a chance to extend the session or logout.



If you do nothing, you will be logged out after approximately 30 minutes of inactivity.

