

Shared Client Details Instructions

We have identified an issue when trying to submit an application on the broker portal for two people who share an email address and/or phone number (e.g., husband and wife). The page will say “there was an error processing your request” and below that it will also say “email field must be unique” and/or “phone number field must be unique.”

We have created a work around for this scenario, but please be aware that **this will only work if the two applicants live in the same zip code and county.**

1. Under the “clients” tab in the broker portal you will need to create a client profile under one person (e.g., the wife).
2. Start an application from that profile and complete it as usual.
3. After submitting the first application, start another application from the same profile.
 - a. Once you are in the application, you can change the information in the boxes to match the second applicant’s (e.g., the husband’s).
 - i. **The only information that cannot be changed is zip code and county.**

Please see below for the same process, but with screenshots:

Under the “clients” tab in the broker portal, create a client profile for one of the applicants.

The screenshot shows the UCare broker portal interface. At the top is a dark blue navigation bar with the UCare logo and menu items: Workbench, Clients, Quotes, Applications, Members, Resource Center, Commissions, Contact Us, and Log Out. Below the navigation bar is a client profile page for 'Spouse Test'. On the left is a sidebar with client details: Email (redacted), Phone (redacted), Date Created (10/20/2023), and Address (500 Stinson Blvd S, Minneapolis, MN 55413). There is an 'Edit Client Details' link. On the right, there are 'New Quote' and 'New Application' buttons. Below these is a table with columns: Application ID, Plan, Applicant Name, Requested Effective Date, and Action. The table currently shows 'No data found.' At the bottom of the page, there is a footer with the UCare logo and links for 'about UCare', 'who we are', 'notices', and 'non-discrimination'.

Under client profile, select “new application”, then start and submit the application for the applicant the client profile was created under.

< All Clients

Spouse Test

New Quote New Application

Applications Quotes

Application ID	Plan	Applicant Name	Requested Effective Date	Action
2055483	UCare Classic (HMO-POS) Classic Choice Dental	Spouse Test	01/01/2024	

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Email
[Redacted]

Phone
[Redacted]

Date Created
10/20/2023

Address
500 Stinson Blvd S
Minneapolis, MN 55413

[Edit Client Details](#)

Then under the same client profile, select “new application” again, then during the application you can change all the details (except zip code and county).

Application one under the client with client details prepopulated:

Profile

What is your relationship to the enrollee? *

Self
 Legal Guardian
 Power of Attorney

Requested Effective Date *

01/01/2024

Prefix

[Empty field]

First Name * Middle

Spouse [Empty field]

Last Name *

Test

Date of Birth * Age

mm/dd/yyyy [Empty field]

Gender *

Male Female

Application 2 under the client where we edited the prepopulated values to the 2nd applicant’s information.

Profile

What is your relationship to the enrollee? *

Self
 Legal Guardian
 Power of Attorney

Requested Effective Date *

12/01/2023

Prefix

First Name * Middle

Spouse-Wife

Last Name *

Test

Date of Birth * Age

 58

Gender *

Male Female

How the applications will display under the client profile:

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

Email

Phone

Date Created
10/20/2023

Address
500 Stinson Blvd S
Minneapolis, MN 55413

Edit Client Details

< All Clients

Spouse Test

Applications Quotes

Application ID	Plan	Applicant Name	Requested Effective Date	Action
2055484	UCare Classic (HMO-POS) Classic Choice Dental	Spouse-Wife Test	12/01/2023	
2055483	UCare Classic (HMO-POS) Classic Choice Dental	Spouse Test	01/01/2024	

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