Ambetter BrokerOffice User Manual

Step-by-step Instructions on How to Use the Ambetter Enrollment Portal

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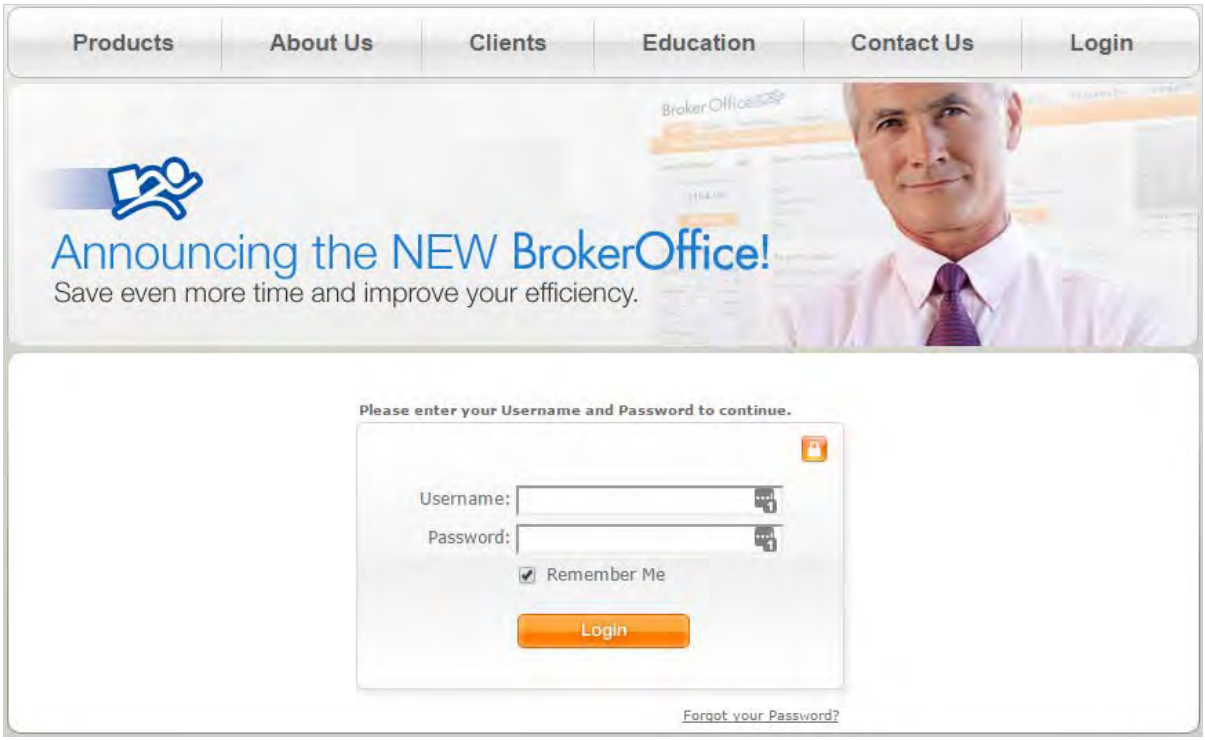
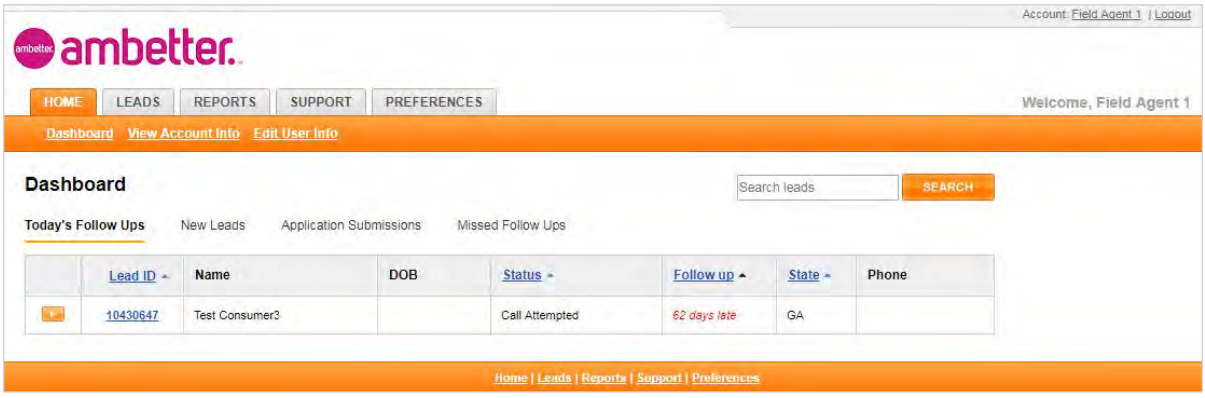
Using Ambetter BrokerOffice

Logging In

- Login to BrokerOffice using **"User Name"** and **"Password"**
- Click the "Login" button
  *Note: If password reset is needed, select the **"Forgot your Password?"** link and enter your username. An email will be sent to the email address on file with instructions how to reset your password.*

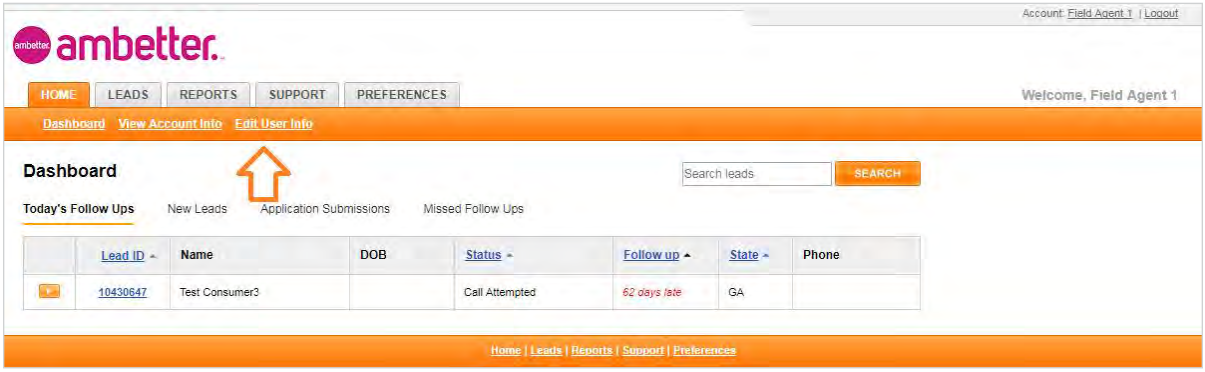


- After successful login, you will be taken to your BrokerOffice homepage called the **"Dashboard"**
  - On this page, you will be able to see any scheduled follow-ups that are scheduled today or in the past, any leads created that day (titled "New Leads"), and any submitted applications
    Note: Until a follow up is marked as complete, it will continue to appear in this view.

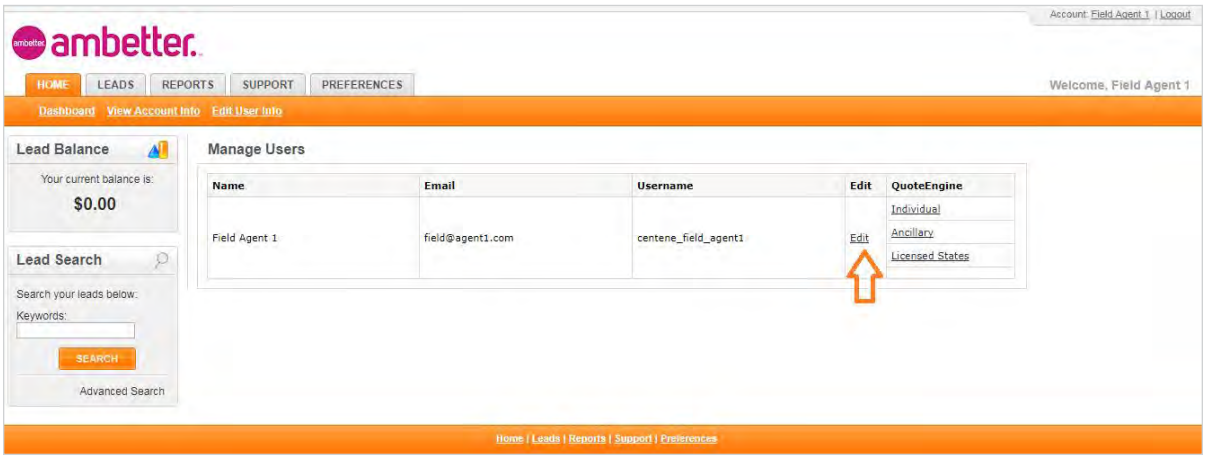


Updating Agent Information (including FFM ID)

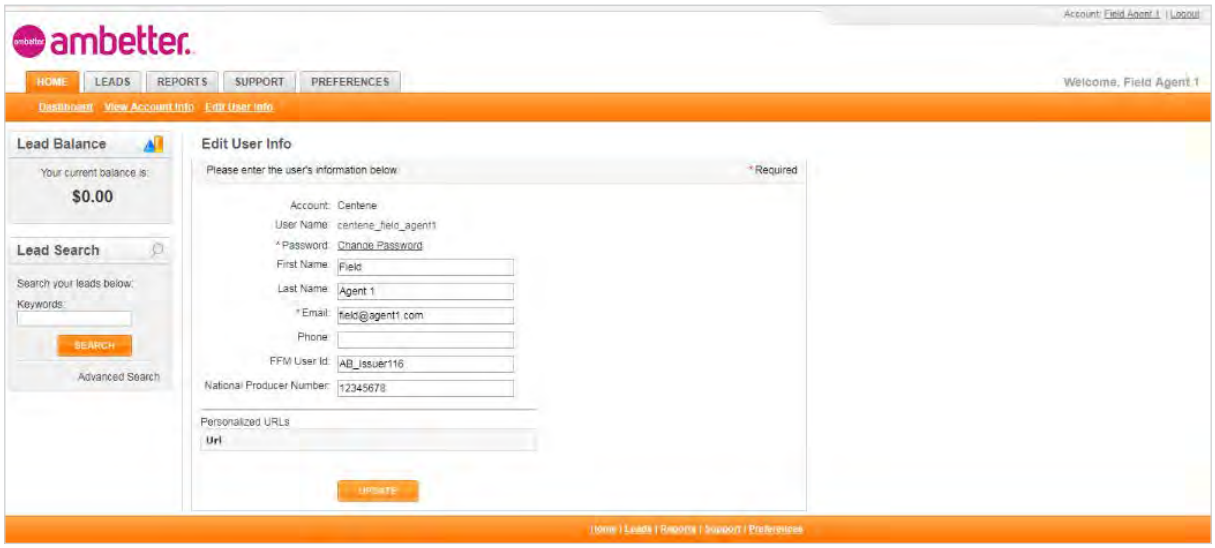
- Select **"Edit User Info"** link in the orange bar



- Select **"Edit"**

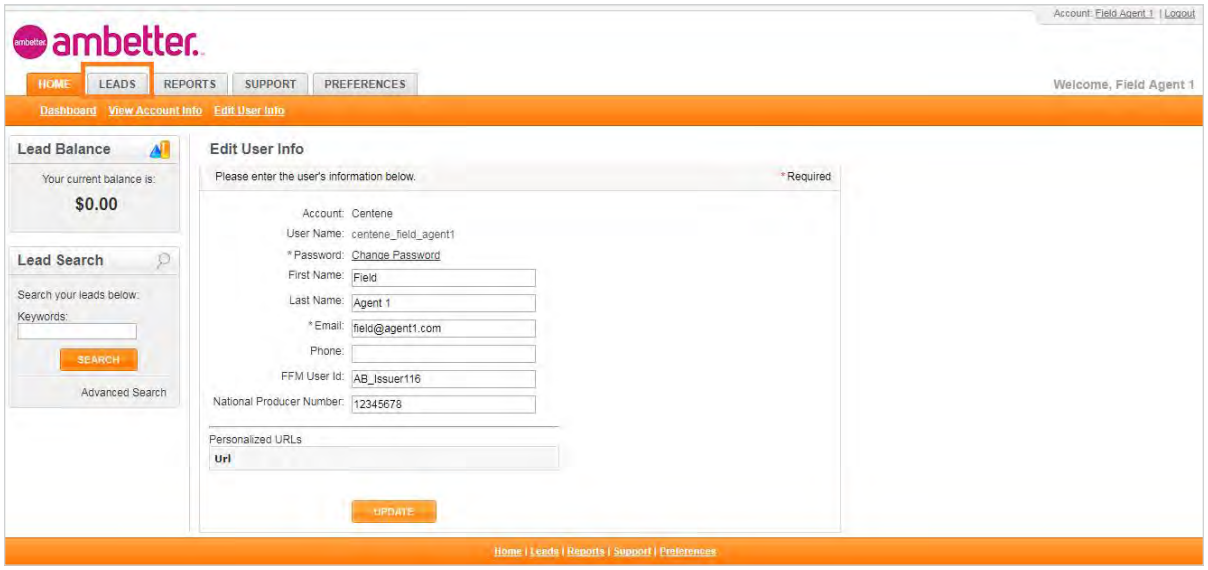


- You can then edit any of the below information:
  - User Name
  - Password
  - First/Last Name
  - Email
  - Phone Number
  - FFM User ID
  - NPN
- Once updates are made, click **"Update"** to save changes

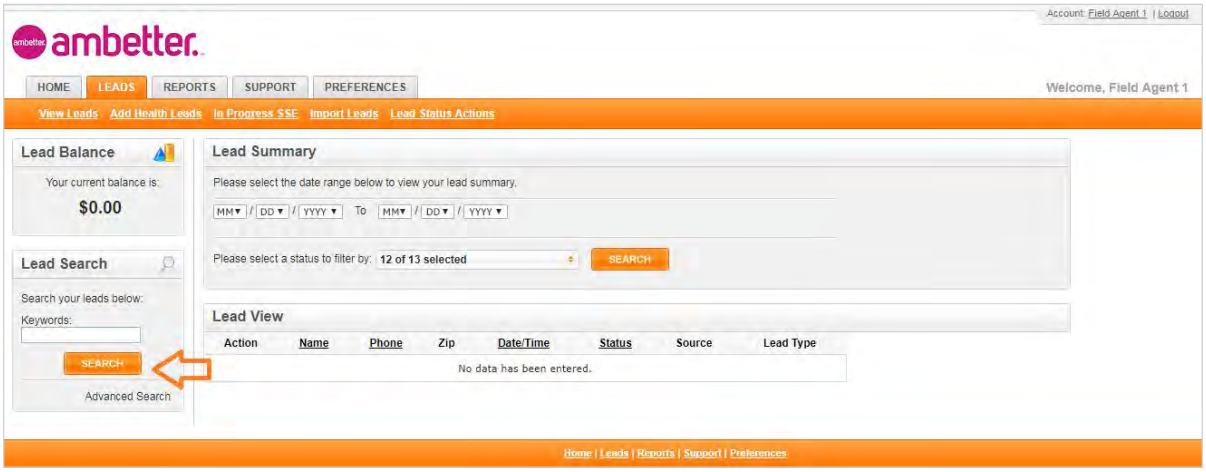


Search/Edit Existing Lead

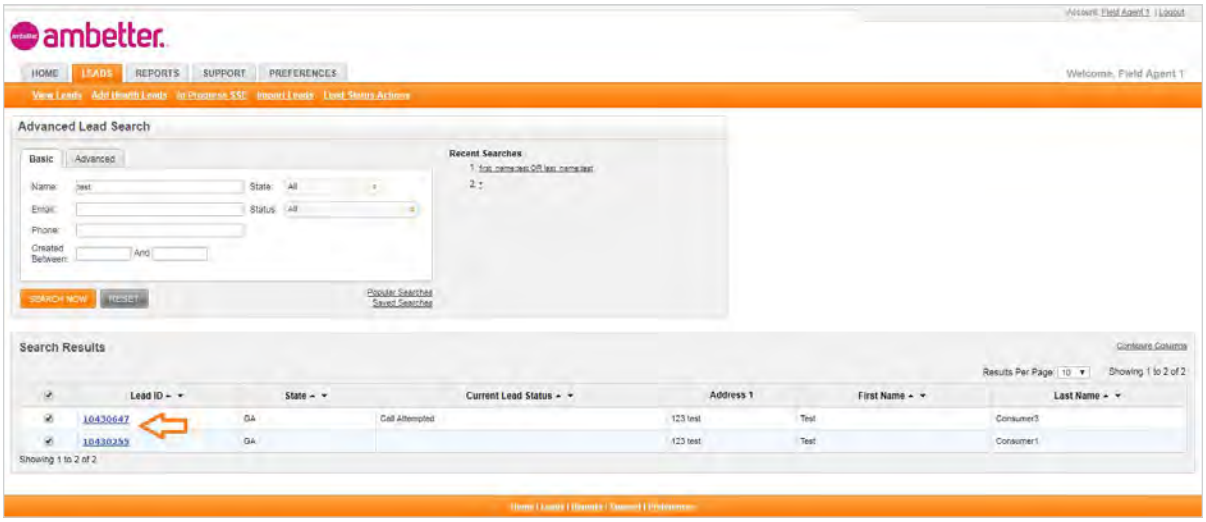
- Click **"Leads"** tab to access lead information



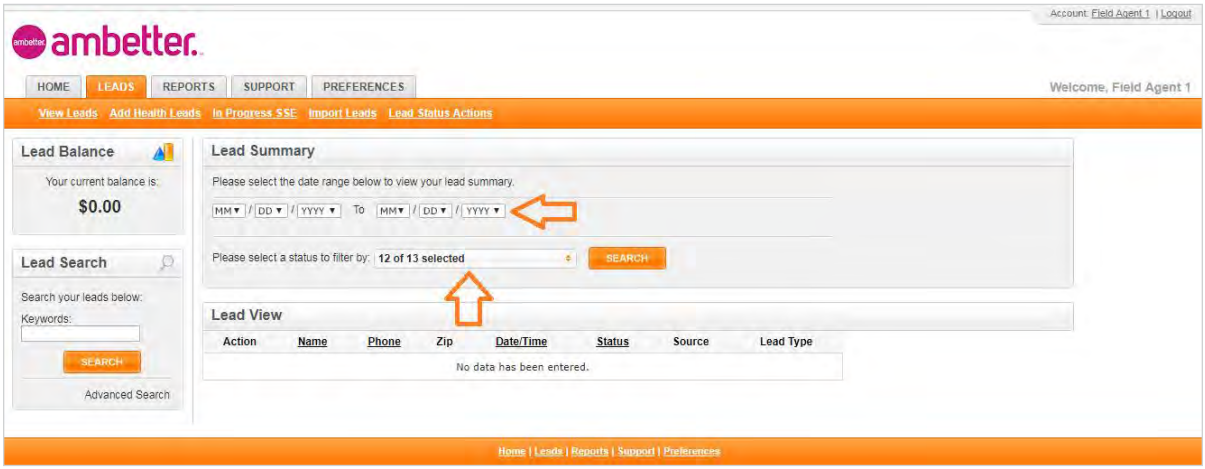
- You can search leads one of 2 ways:
  1. **"Quick Search"** for all of your leads by clicking **"Search"** button in the lead search box on the left side of the screen



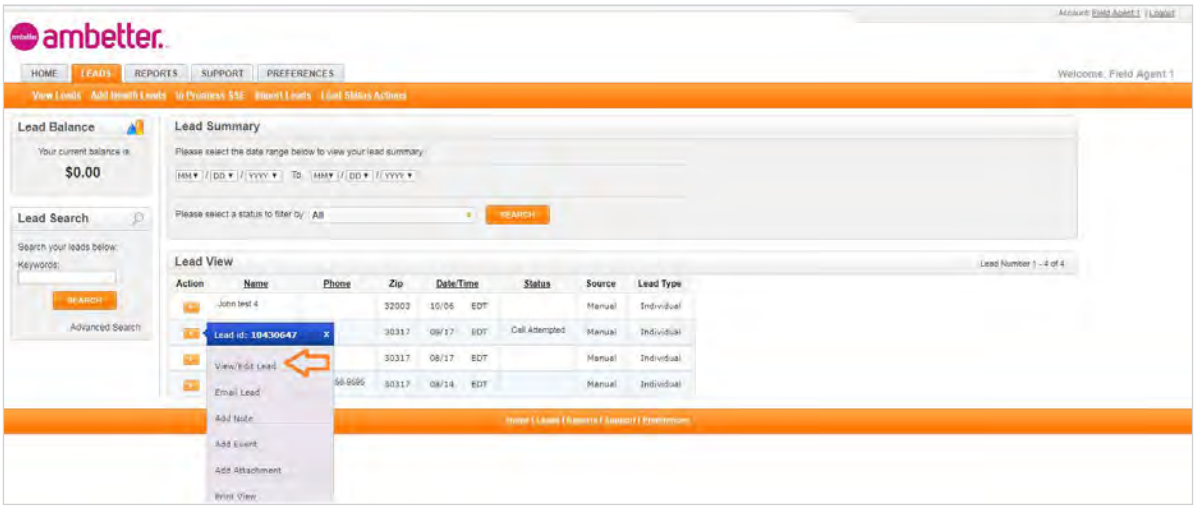
- If you want to enter a lead's page, you can do so by clicking the link in the **"Lead ID"** column



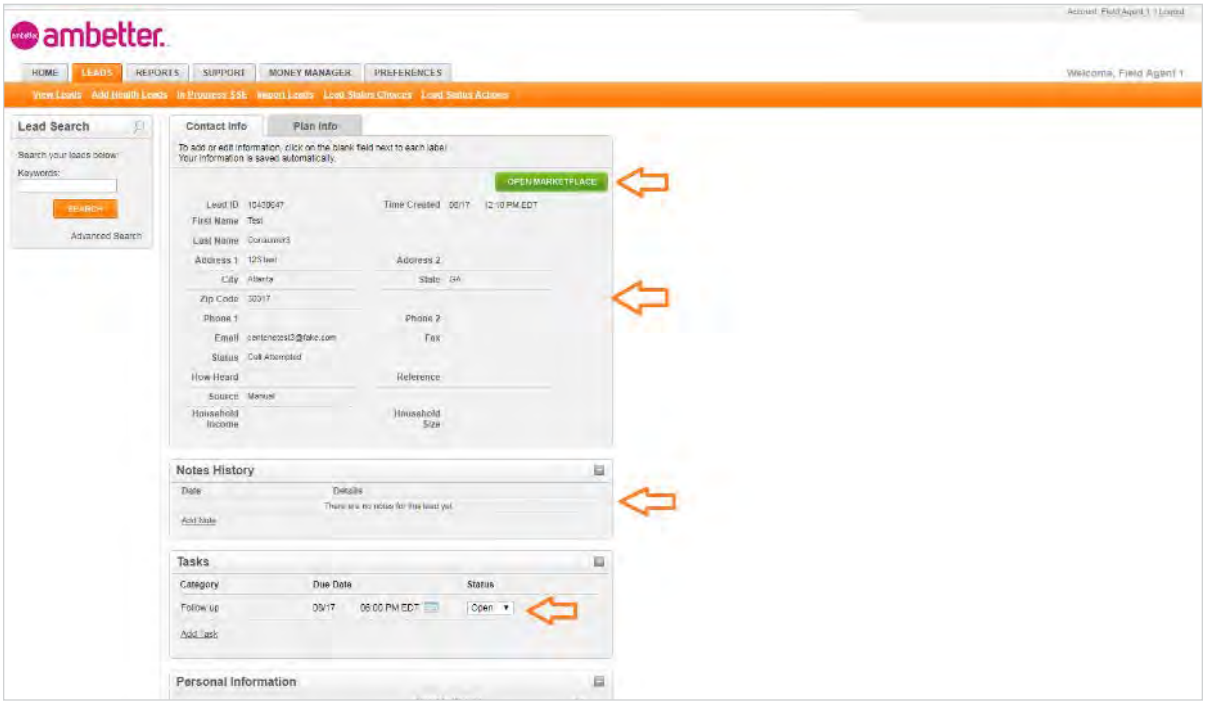
2. To search for leads in a specific status or set date range, by using the filter options in the **"Lead Summary"** section in the middle of the screen



- To enter a specific lead's page, click the orange **"Play"** button, then **"View/Edit Leads"**

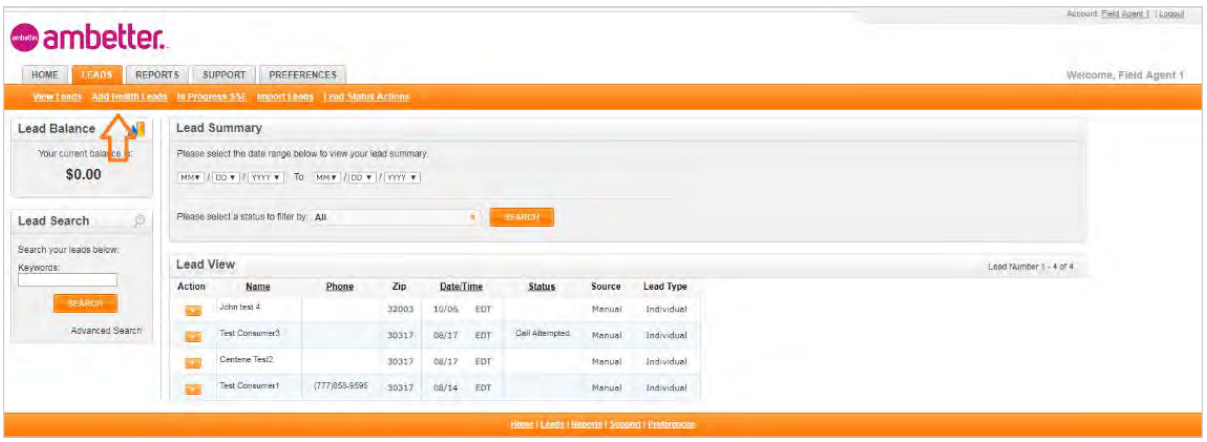


- You can do the following from the lead page:
  1. Edit any information about the lead
  2. Add/Edit Notes
  3. Set/Manage follow ups
  4. Launch the Quoting/Enrollment Marketplace by clicking on the green **"OPEN MARKETPLACE"** button

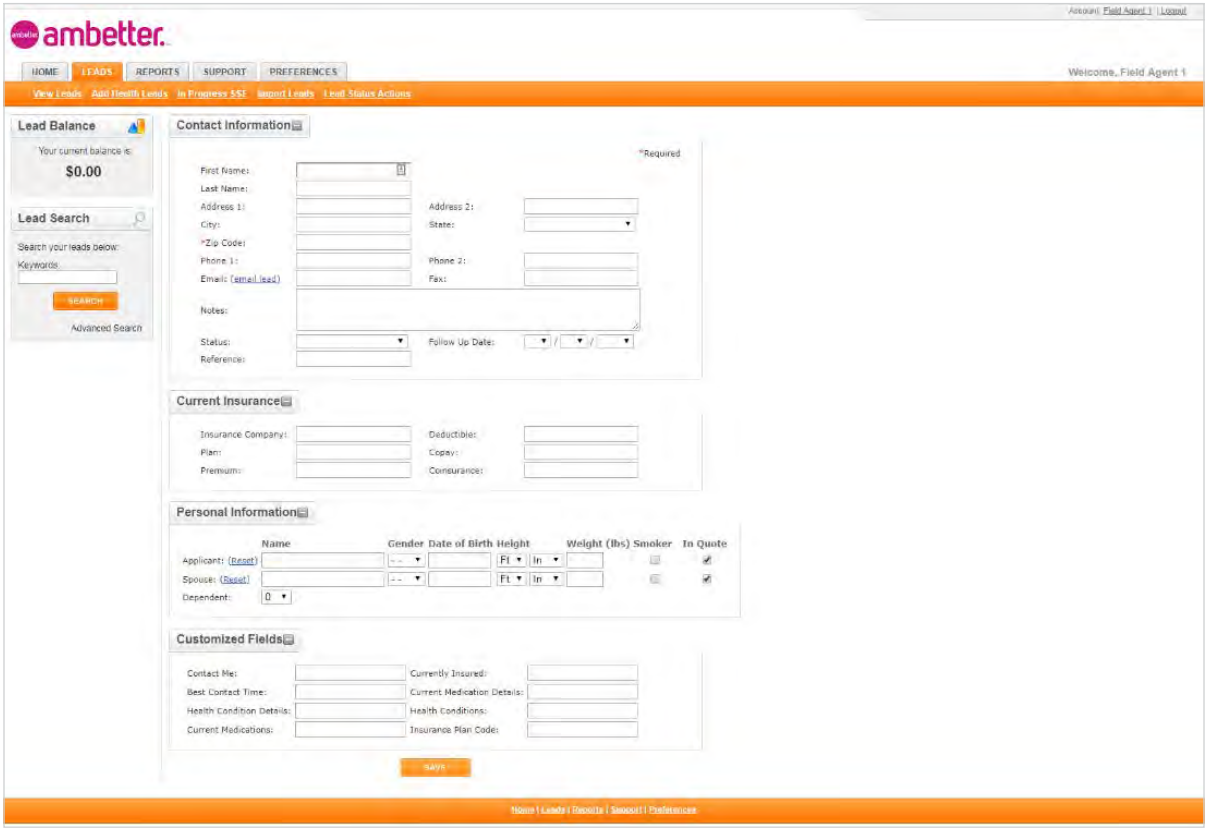


Adding New Leads

- Click on **"Add Health Leads"** button from the **"Leads"** page
- Click the **"Leads"** tab and then select **"Add Leads"** from the menu below the tabs

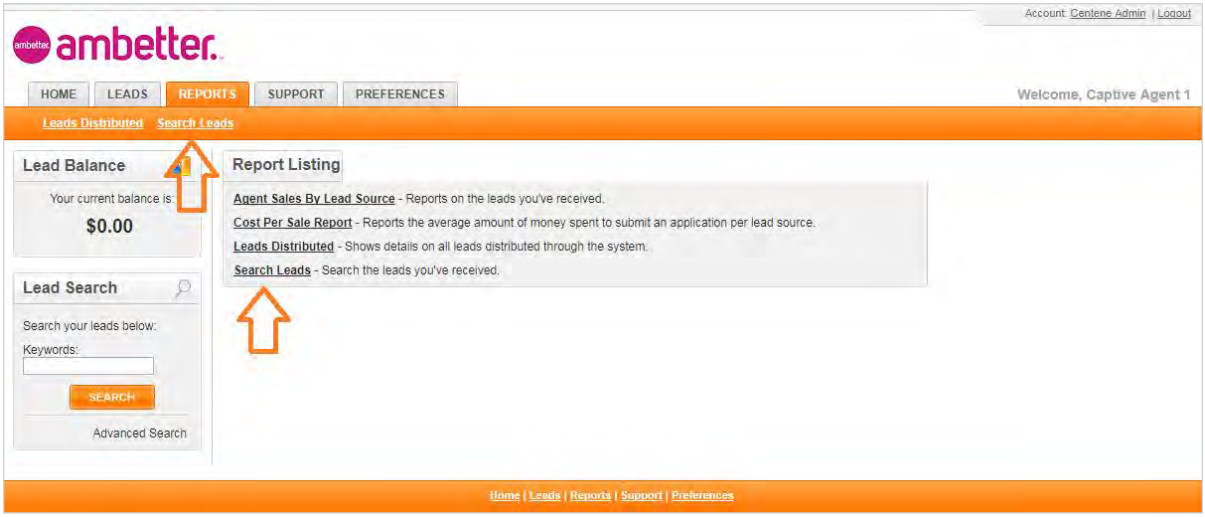


- Enter the information for the lead
- Make sure to enter information all required fields
  Note: In order to launch a lead into a Marketplace session to quote and shop for health plan, an email address and zip code is required
- Click **"Save"** when complete

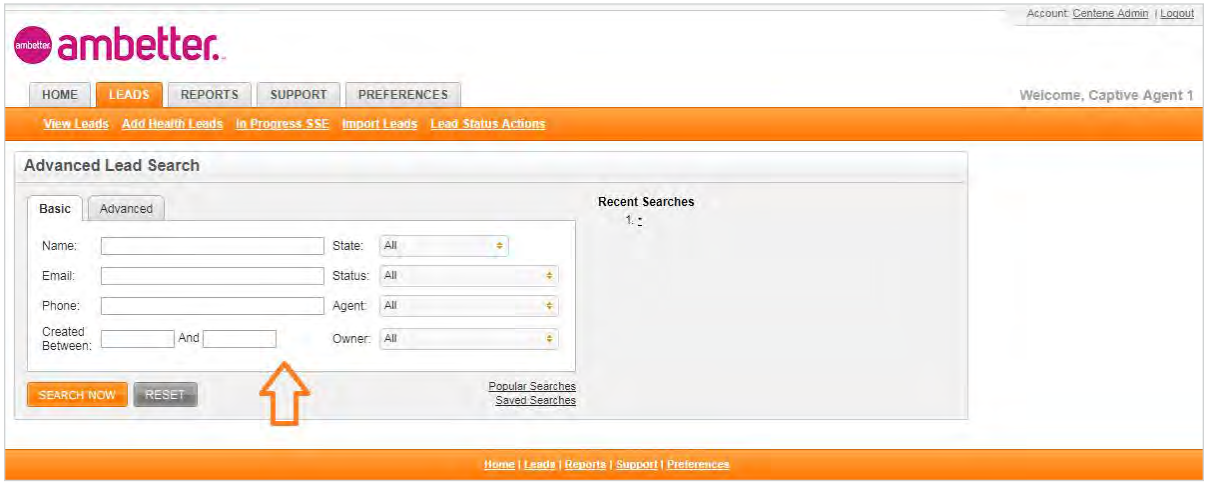


Reporting

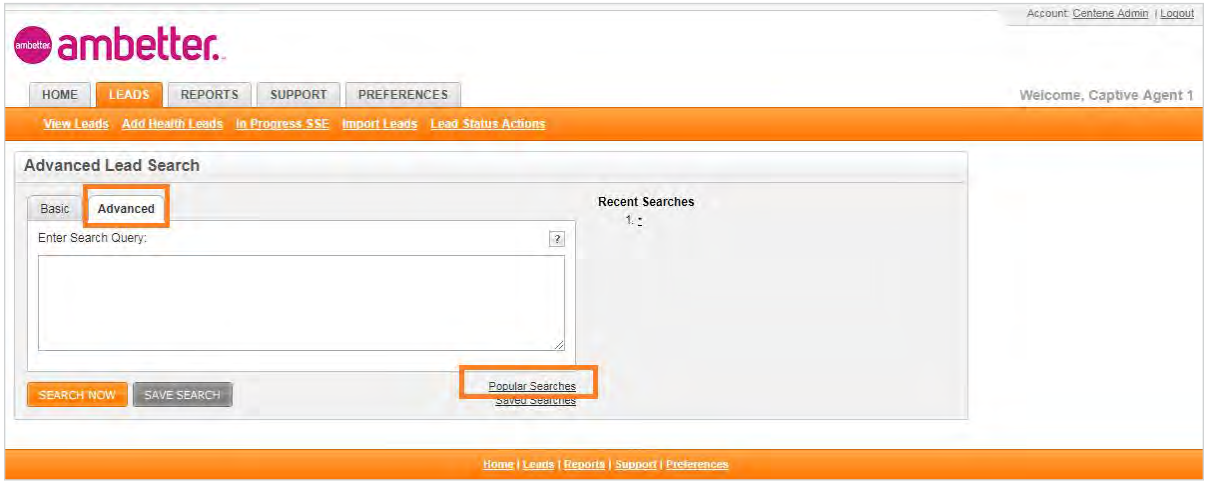
- Click the **"Reports"** tab to view report listing
- To run additional reports, select **"Search Lead"**



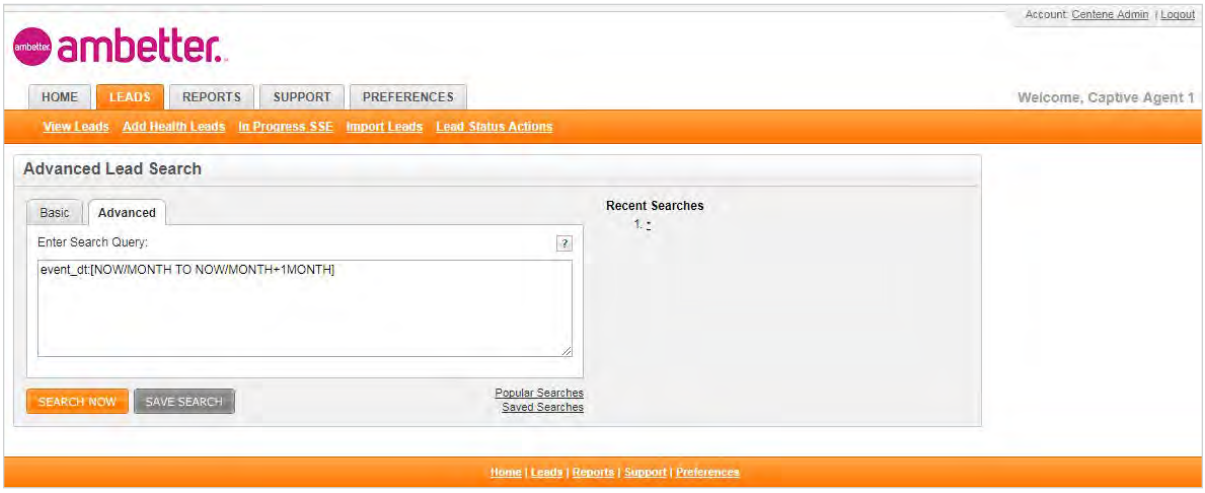
- If the **"Search Lead"** button is clicked, you can run basic queries based on:
  - Name of consumer
  - Email address of consumer
  - Phone number of consumer
  - Created date of the lead
  - Status of the lead



- Click on **"Advanced"** if you would like to run more advanced queries
- Click on **"Popular Searches"** to pull up a list of popular advanced searches



- If you are comfortable coding your own advanced search query, enter it in the field below the **"Advanced"** tab



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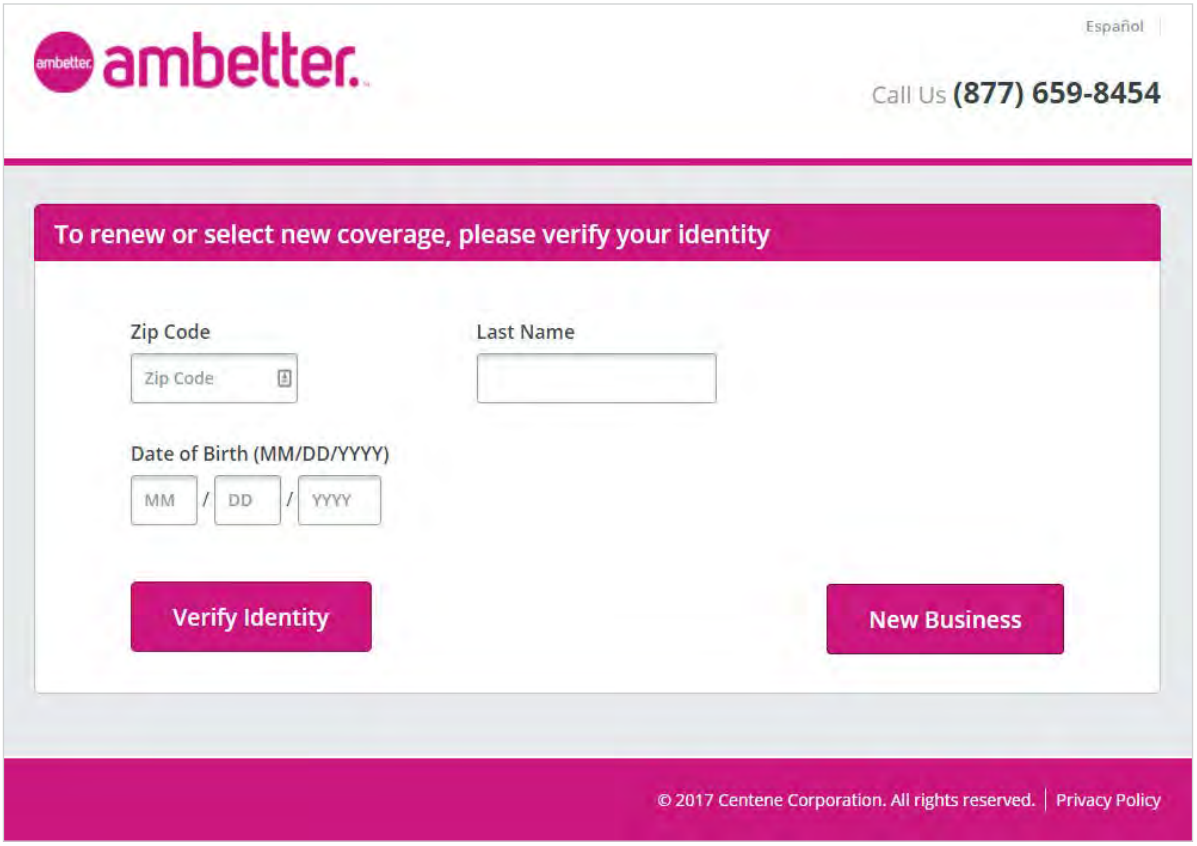
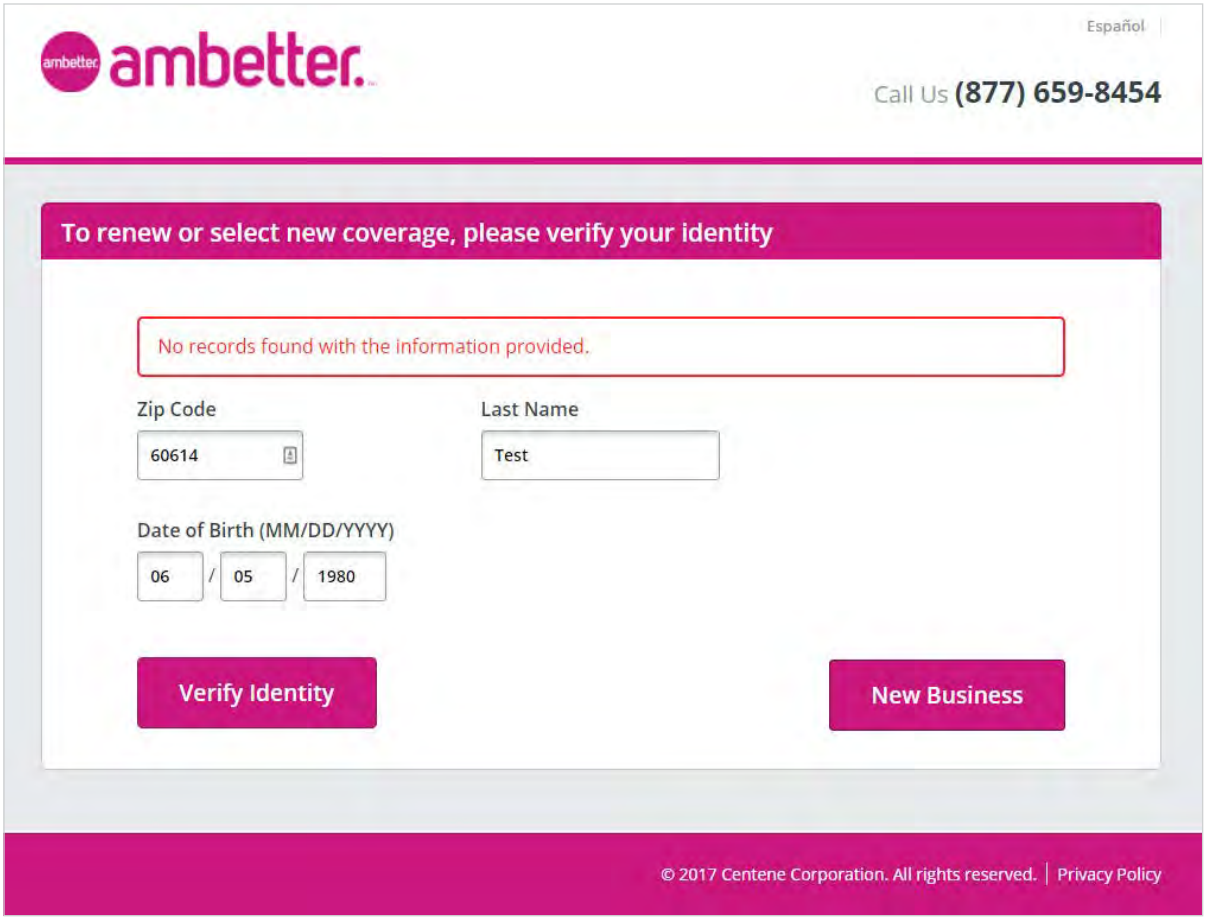
Quoting/Enrollment: Renewal Flow

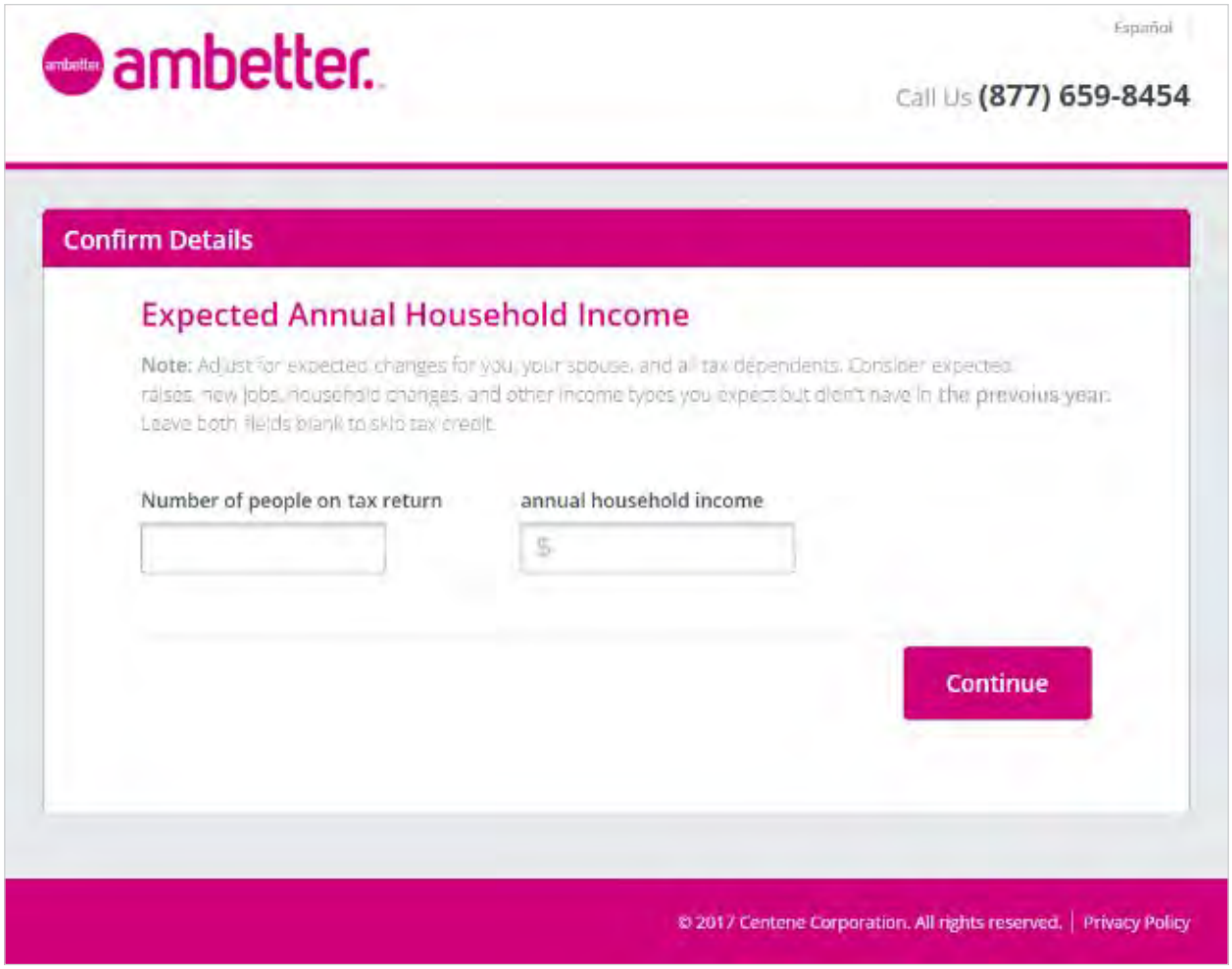
Once you launch the quoting/enrollment Marketplace from BrokerOffice, you will be taken to the below page:



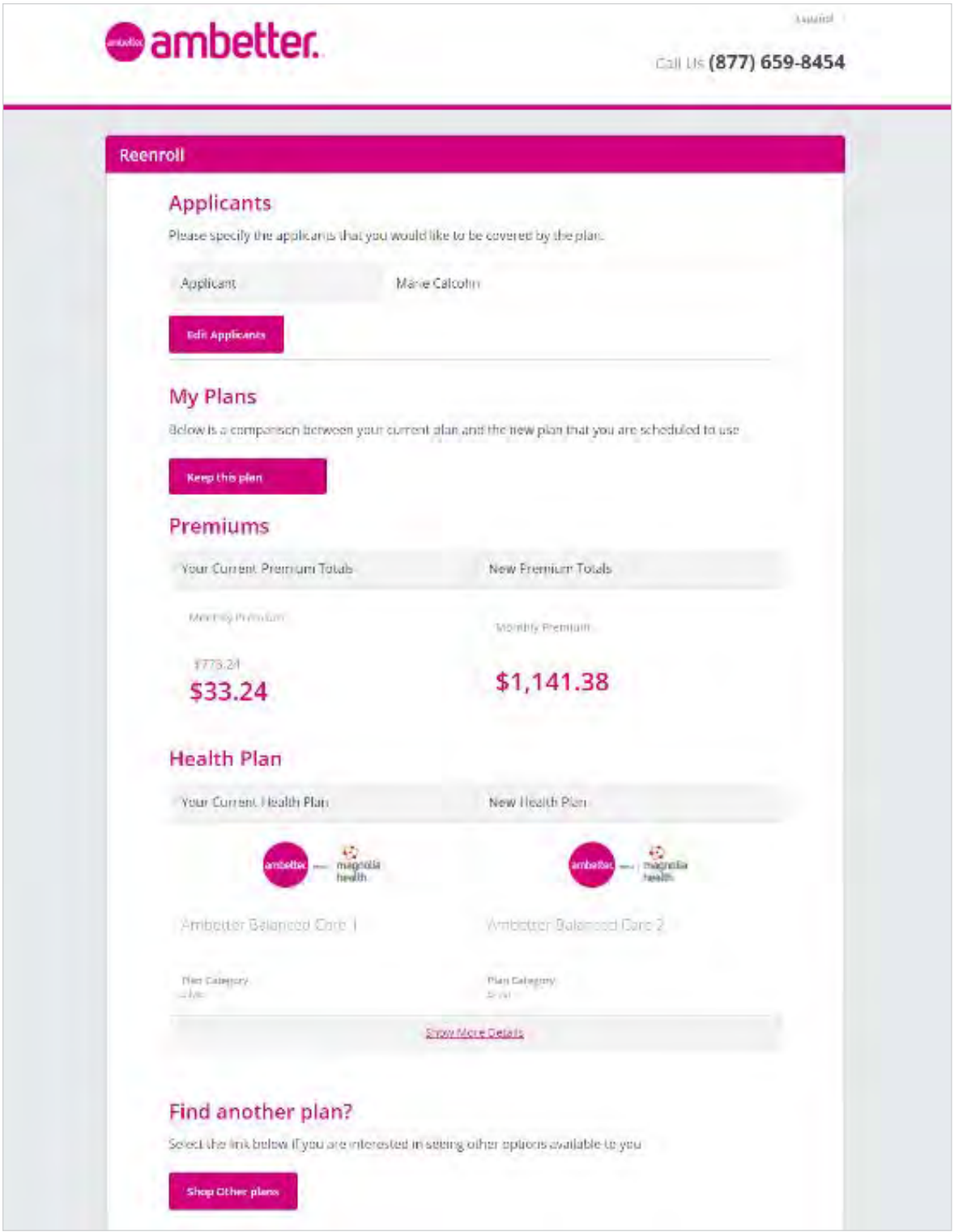
- To quote/enroll an existing member (aka "Renewal"), enter the consumer's zip code, last name, and date of birth
- Click **"Verify Identity"**
  *Note: If a record cannot be found using the information entered, you will receive an error message at the top of the screen. At any point, you may advance to quote the consumer by clicking the **"New Business"** button*



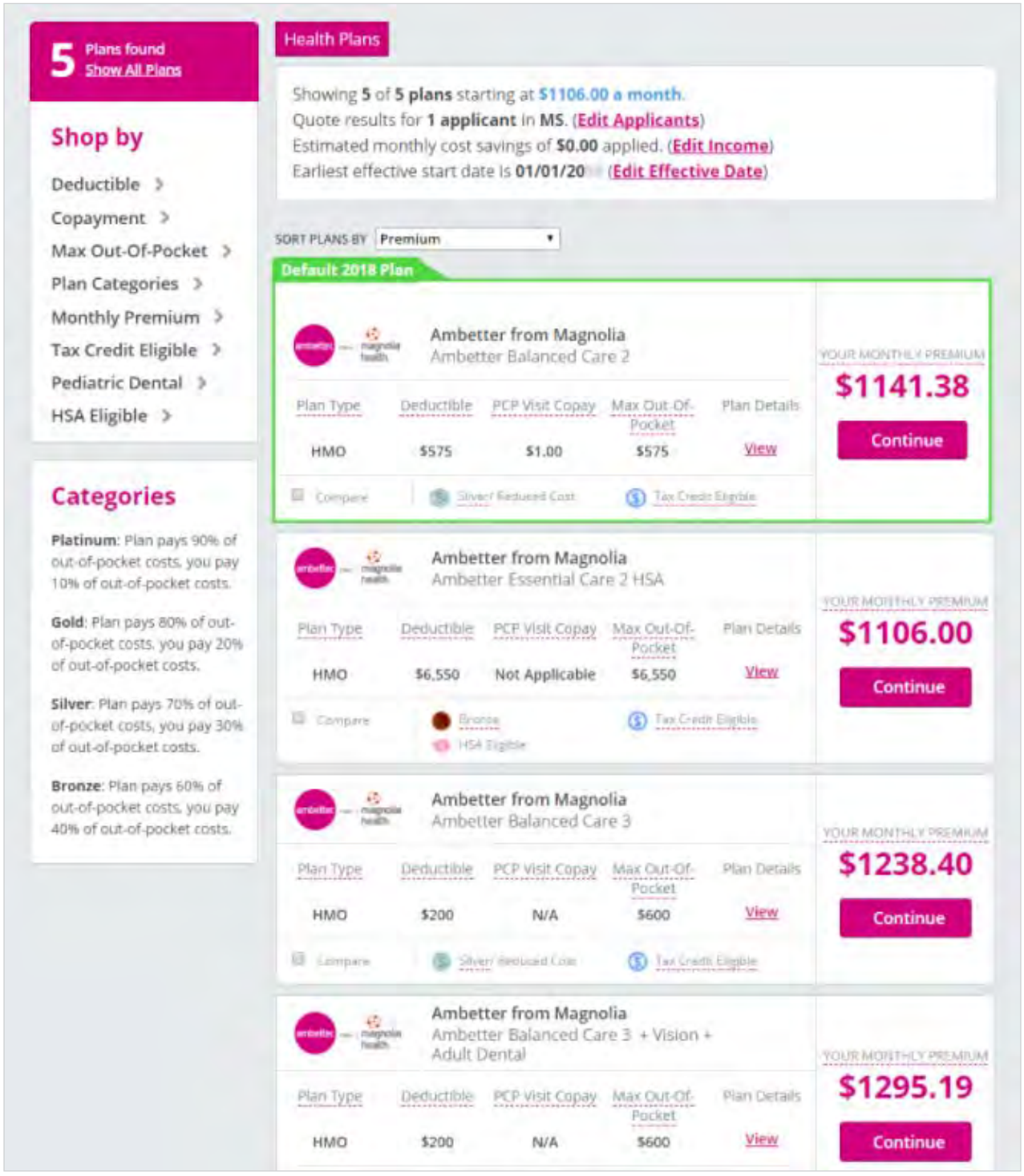
- Once the member is verified, you will be prompted to enter information needed to estimate the 2018 subsidy
  Note: The estimated savings are not final. The actual subsidy amount will be determined after the application is submitted to the FFM.
- Once entered, click **"Continue"**



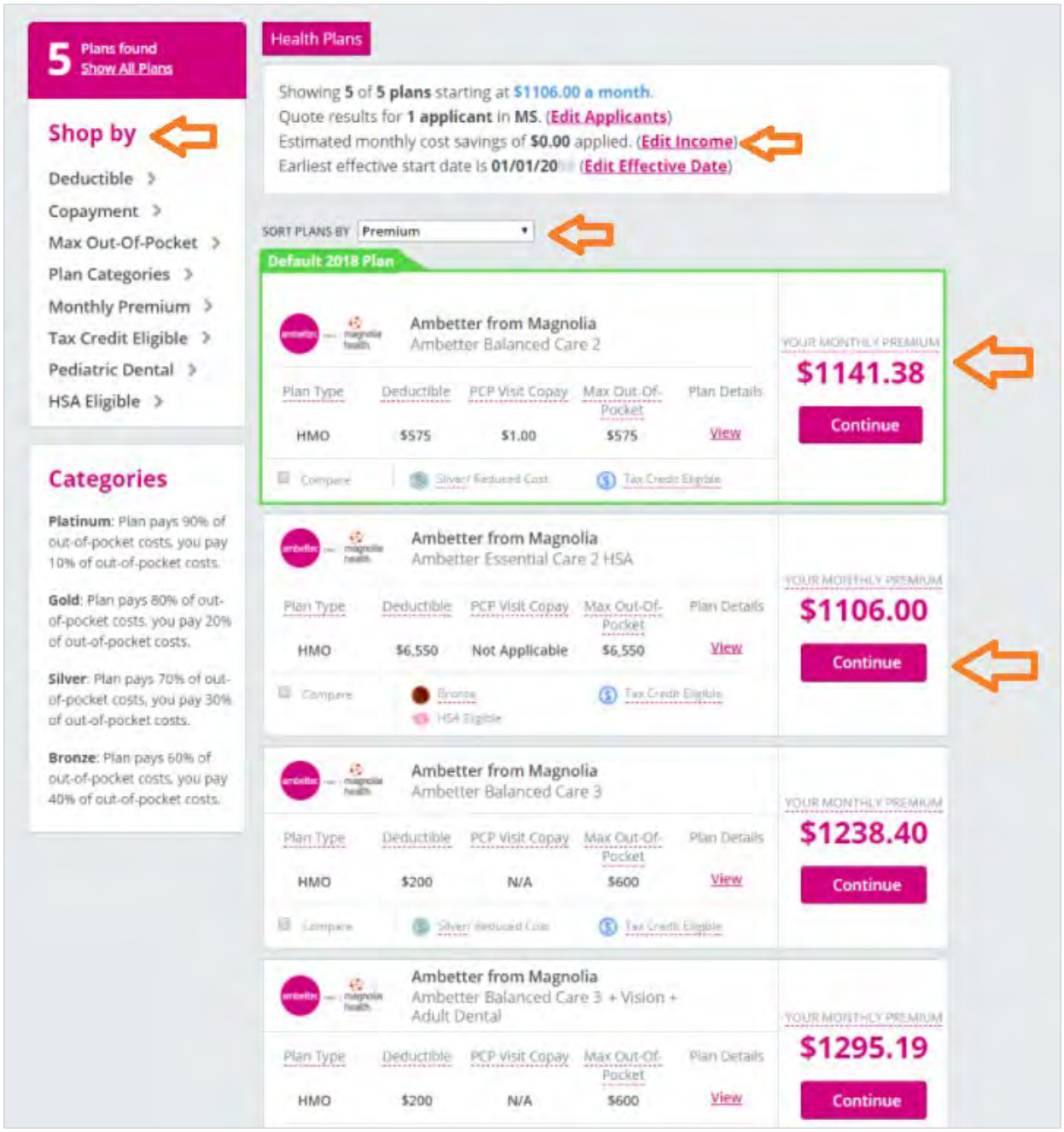
- You will then be taken to the **"Plan Renewal"** page where you will be able to take the following actions:
  1. Edit applicants on the plan
  2. Compare current plan to a recommended plan
  3. Select to keep current plan
  4. Shop other available plans


ambetter.
Call Us (877) 659-8454
Reenroll
Applicants
Please specify the applicants that you would like to be covered by the plan.
Applicant
Marie Calcohn
Edit Applicants
My Plans
Below is a comparison between your current plan and the new plan that you are scheduled to use
Keep this plan
Premiums
Your Current Premium Totals
New Premium Totals
Monthly Premium
$33.24
Monthly Premium
$1,141.38
Health Plan
Your Current Health Plan
New Health Plan
Ambetter Balanced Care 1
Ambetter Balanced Care 2
Plan Category
Silver
Plan Category
Silver
Show More Details
Find another plan?
Select the link below if you are interested in seeing other options available to you
Shop Other plans

- Select **"Keep this Plan"** to proceed straight to enrollment, or **"Shop Other Plans"** to proceed to compare other plan options (shown below)



- If the applicant's subsidy eligibility information needs to be revised, you can do so by clicking by clicking the **"Edit Income"** link
- Plans can be sorted using the **"Sort Plans By"** dropdown menu which appears right above the first available plan to select from
- Plans can also by filtered using the options available in the **"Shop by"** menu on the left side of the screen.
- If the applicant qualifies for subsidized health insurance, then an estimate of the subsidy amount that will be applied is available in the white box above the plans.
- To select a plan, click **"Continue"** next to the plan desired to move to the **"Shopping Cart"** page and advance to the application



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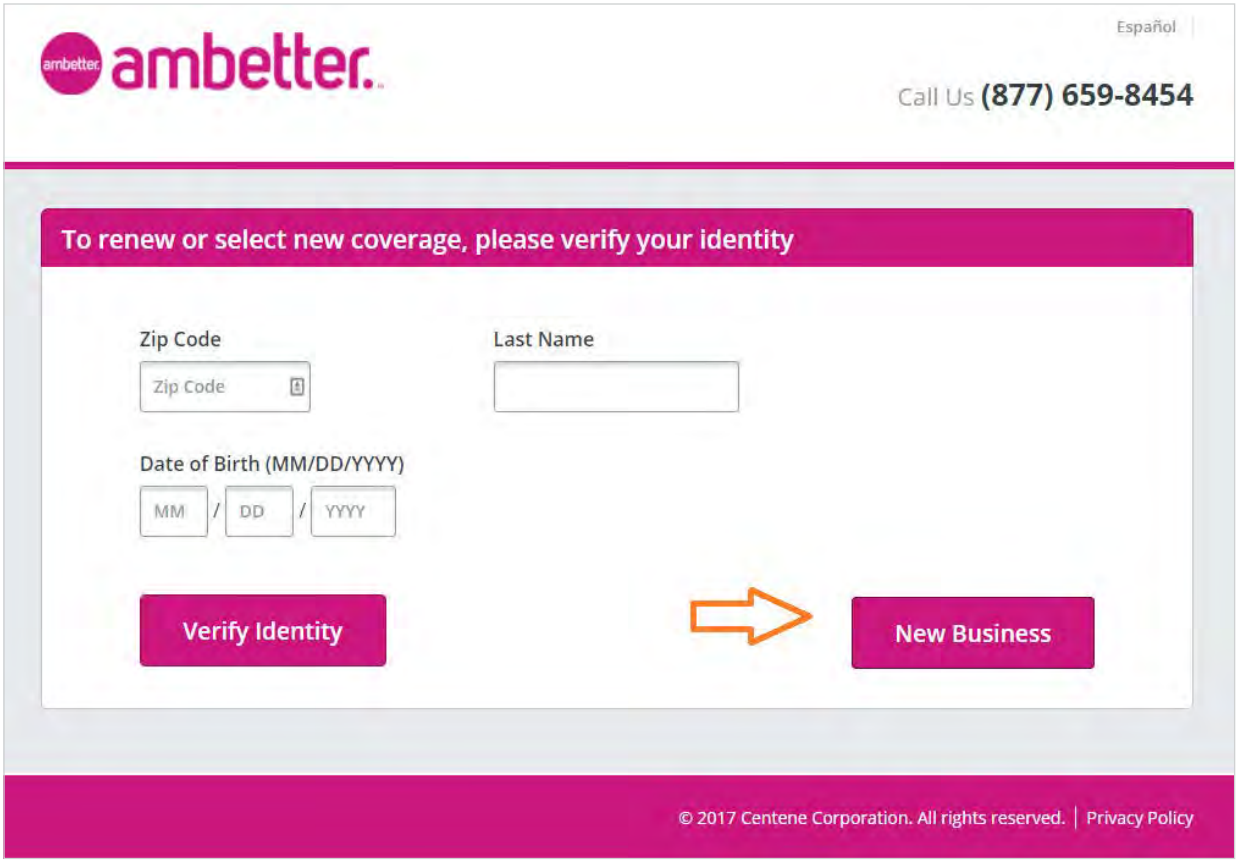
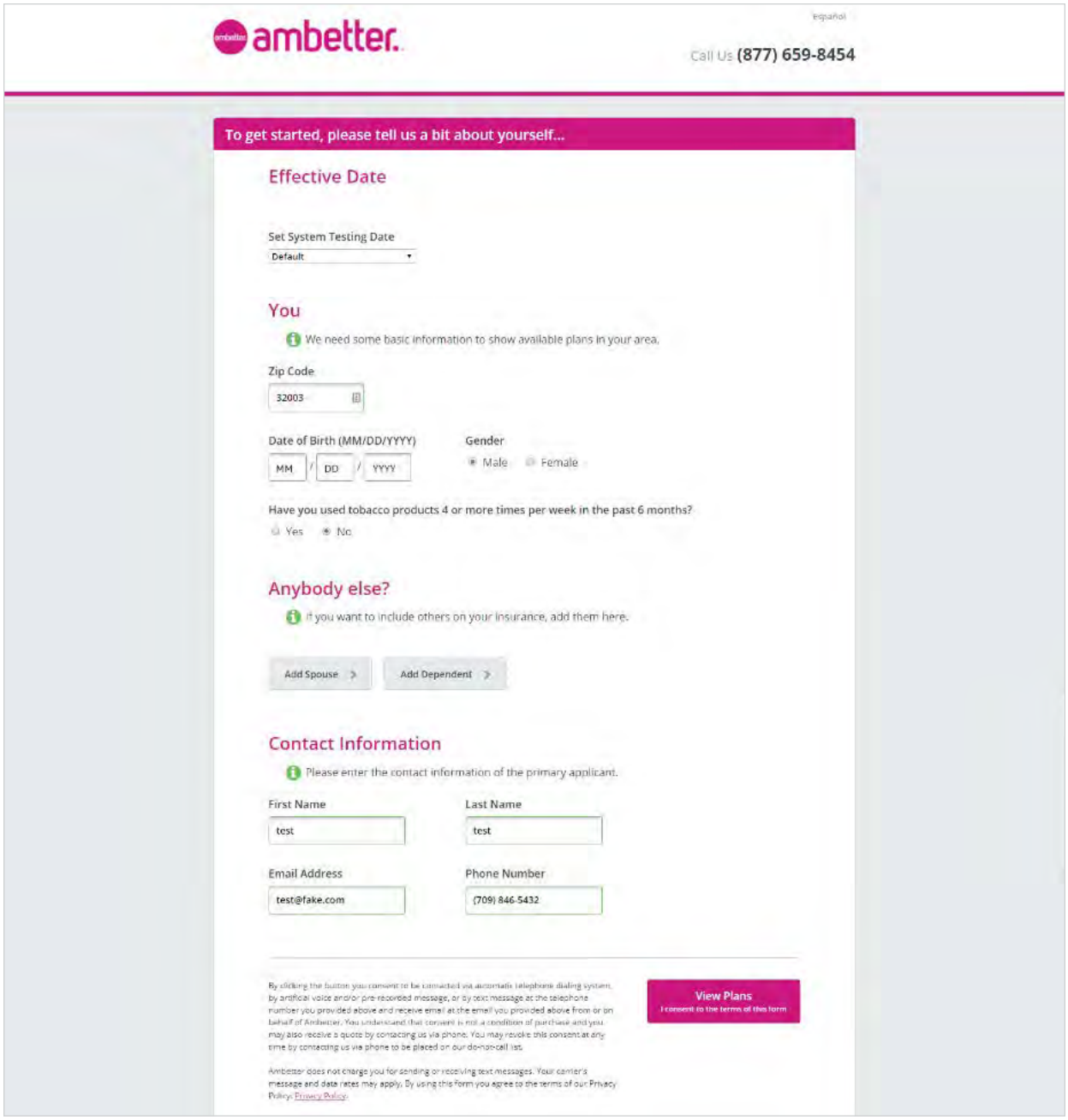
Quoting/Enrollment: New Business Flow

- To quote a consumer who is not an existing member, click **"New Business"** to advance to the quotes

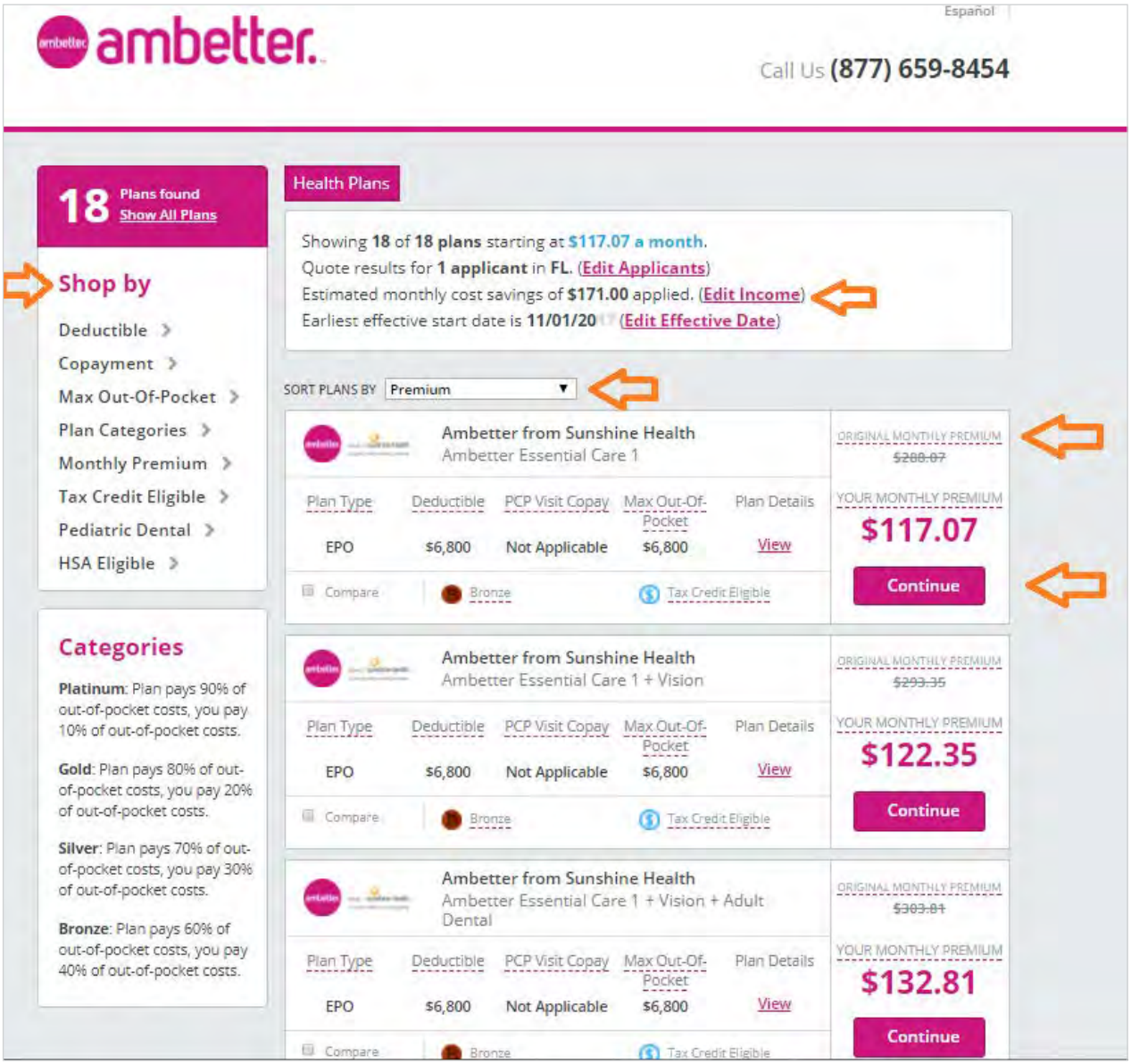


- You will be taken to a page requiring the following information:
  - Enter **"Date of Birth"** (if not passed from BrokerOffice)
  - Select **"Gender"**
  - Enter smoking status
  - Click **"Continue"**
  - If you would like to add a spouse or dependent to the application, click **"Add Spouse"** or the **"Add Dependent"** button
  - Once you click **"Continue"** you will be prompted for the applicant's Contact Information
  - Click **"View Plans"** to begin shopping

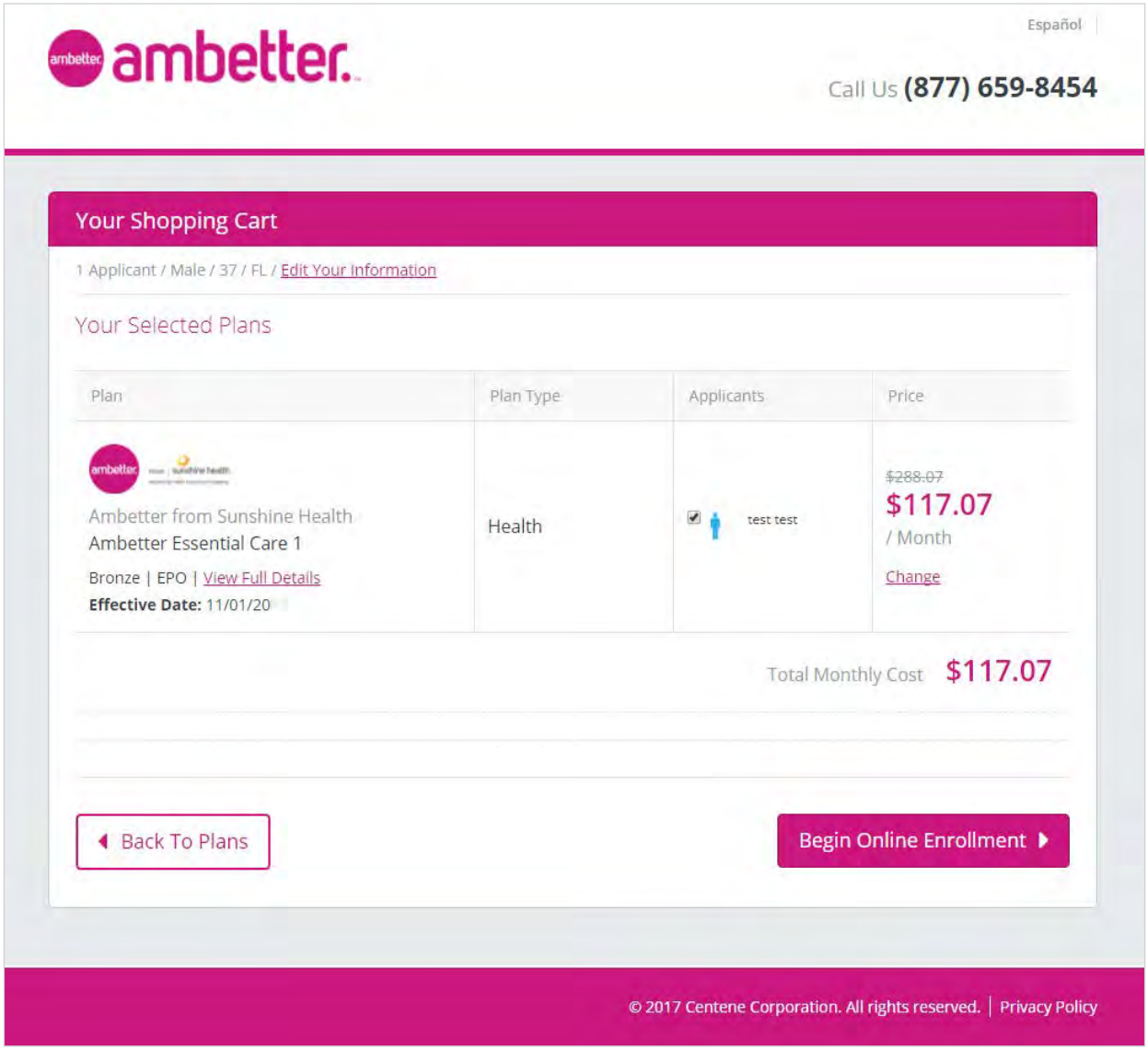


- Once the quoting platform initiates, you will be asked to provide the applicant's household size and yearly income to determine eligibility for subsidized health insurance.
- Enter the total number of individuals living in the household
  Note: Even if the application is on behalf of one individual, household size provided in this screen should be inclusive of everyone who will be reported on the applicant's tax return.
- Enter total yearly income
  Note: This income should be inclusive of all members of the household.
  Note: The estimated savings are not final. The actual subsidy amount will be determined after the application is submitted to the FFM.

- If the applicant's subsidy eligibility information needs to be revised, you can do so by clicking by clicking the **"Edit Income"** link
- Plans can be sorted using the **"Sort Plans By"** dropdown menu which appears right above the first available plan to select from
- Plans can also by filtered using the options available in the **"Shop by"** menu on the left side of the screen.
- If the applicant qualifies for subsidized health insurance, then an estimate of the subsidy amount that will be applied is available in the white box above the plans.
- To select a plan, click **"Continue"** next to the plan desired to move to the **"Shopping Cart"** page and advance to the application



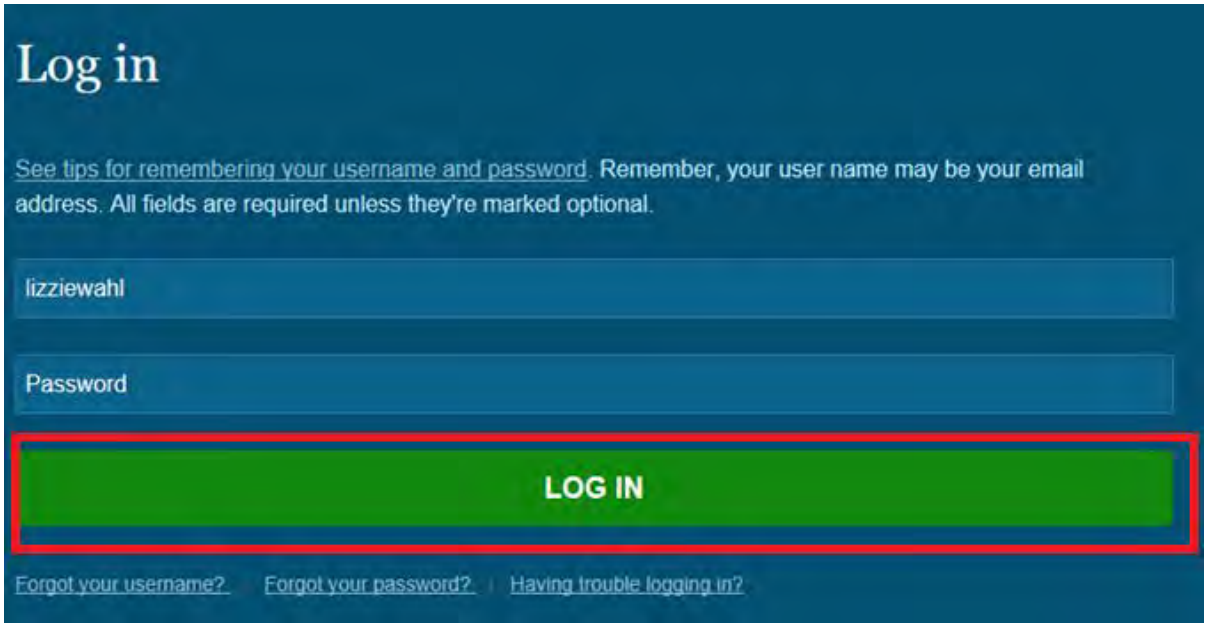
- Review the selected plan info
- To select a different plan, click on the **"Change"** link or click select the **"Back to Plans"** button to go back to the plans page
- If dental is not included in the Medical plan, a Dental policy will automatically be added. To change the dental plan selected, or remove it entirely, click **"Change"** or **"Remove"**
- To begin the application click **"Begin Online Enrollment"**



Please Note: *Before proceeding to the FFM application, agents should be sure to verify their FFM ID and password at https://portal.cms.gov. A few important notes regarding FFM passwords:*

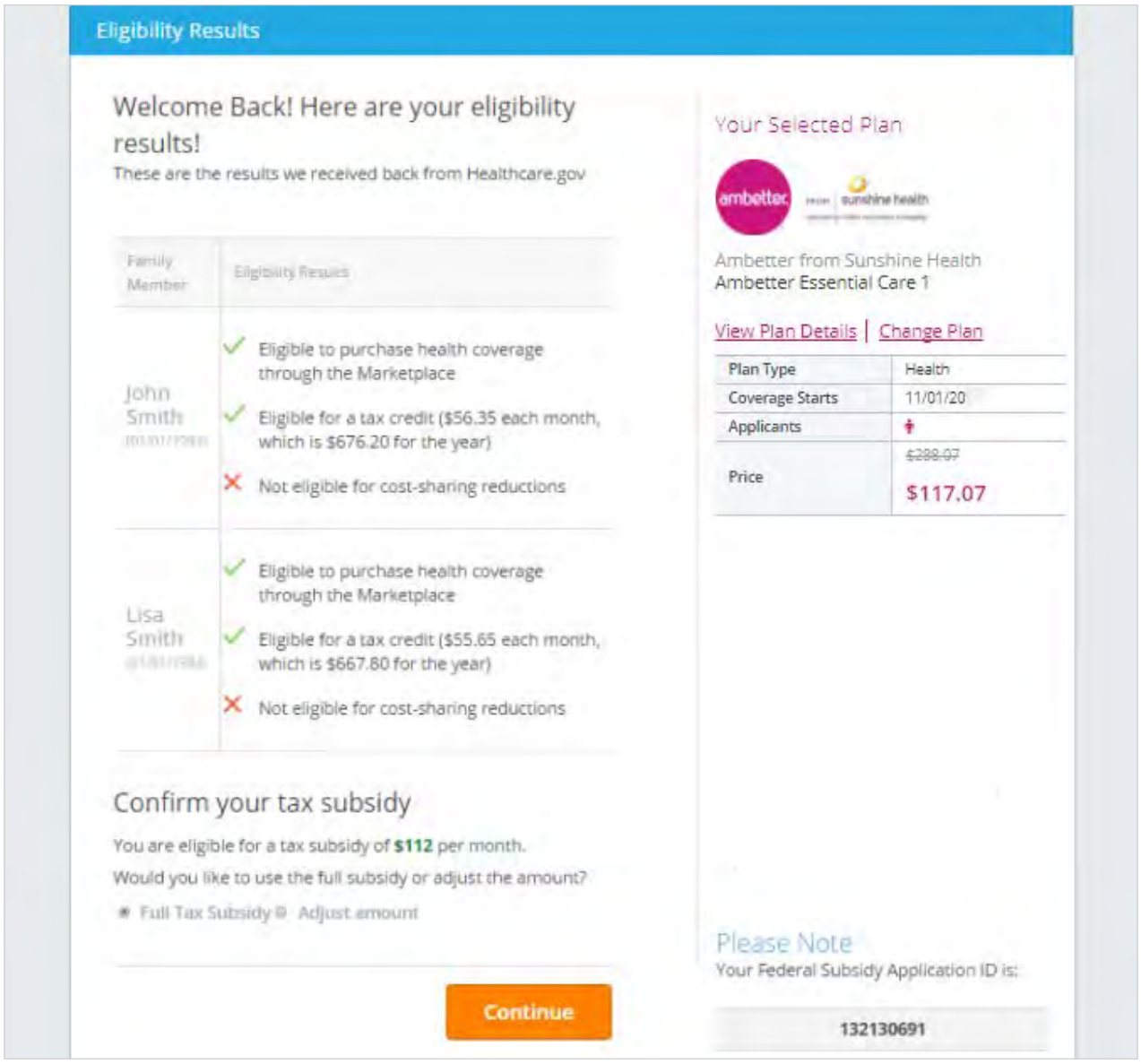
- Your FFM password resets every 60 days. Make sure to update it to sell on-exchange plans.
- The password can only be changed once a day. If you have already changed your password in a given day, you must wait twenty-four (24) hours to reset it again.
- Review plan information one more time, then select **"Continue"**

- FFM Username should pre-populate, you should only need to enter password.
- When password is entered, select **"Log In"**
  Note: If username does not pre-populate, do not attempt to enter it. Exit the tab and re-launch from BrokerOffice



- Proceed to answering all required questions in the Marketplace application and read all required disclaimers.
- Once all questions are answered and disclaimers read, select **"View Eligibility Results"** to bring up PDF of customer's official tax credit
- Once viewed, click **"Return to Enrollment Website"**, to exit the Marketplace and return to the enrollment tool

- To complete the application submission process, you will need to verify how much of the tax credit the consumer would like to apply to the plan's premium on the left side of the screen
- Once the tax credit amount is verified, review the plan details. If you would like to change the plan selection, click **"Change"**
- When the correct plan is showing click, **"Complete Enrollment"** to finish the application submission



Ambetter Health
www.ambetterhealth.com