



# eAgent User Guide

Agent Users

A.E.P. 2014

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# Introduction

## *What is eAgent?*

The eAgent portal is a HealthSpring tool designed to provide agents and agencies access to their Leads and Applications with Cigna-HealthSpring. HealthSpring has designed eAgent to allow agents to perform the following tasks:

- View and manage your leads in detail
- View your scheduled appointments
- View and Track applications
- Download reports

eAgent displays information to agents in real-time without delay. As leads or applications are entered and saved by Cigna-HealthSpring personnel, that data is immediately available for agents to view and use in eAgent.

**Note:** *Processing delays do exist between the time a paper application is received and the data is captured in our system. Once the electronic record is captured in our system, however, the data will be available to agents through eAgent.*

# Getting Started

eAgent is an internet application accessed through a web browser. You may use any browser of your choosing, but eAgent has only been fully tested on Internet Explorer 8.

## Launch the Website

Once you have opened your web browser, open a **Private Browsing** session or tab. This may be labeled differently depending on the browser used, so use the instructions below:

- [Mozilla Firefox - Private Browsing](#) (or shortcut **Ctrl + Shift + P**)
- [Chrome - Incognito](#) (or shortcut **Ctrl + Shift + N**)
- [Internet Explorer - InPrivate](#) (or shortcut **Ctrl + Shift + P**)

Private Browsing disables all add-ons, plug-ins, and toolbars for that browsing session. It also prevents the browser from tracking or saving any data like browsing history or cookies – all of which have been known to cause temporary incompatibility issues with eAgent.

Once a Private Browsing tab has been opened, use the tab to enter the following URL to view the eAgent login page:

<https://broker.cignahealthspring.com/>



Forgot password



User Name

Password  

This is a private computer

© 2012 CDC Software. All rights reserved.

## Logging In

Type in your user name and password, and press enter or click on the blue arrow to the right to log in. Checking the “This is a private computer” box below will save your username (but not password) for the next time you navigate to this site.

**Note:** *The first time New Agents login to eAgent, the system will force new agents to create a new Password. (See Creating a New Password in this section).*

## Don't Have Your User Name and Password?

This is usually the same as your AgentID or AgencyID number, and it should have been provided in your welcome email.

**Note:** *If you were not provided with a User Name and password, please contact your Sales Manager.*

## Creating Your New Password

The first time you access eAgent, the system will force you to create a new password. Enter the password of your choice using the following rules:

- Be between 8 and 20 characters, AND
- Contain at least one uppercase alphabet, AND
- Contain at least one lowercase alphabet, AND
- Contain at least one numeric character, AND
- Contain no spaces.

## Forget Your Password?

If you forget your password, use the **Forgot Password** link on the login page above the dialogue box.



This will prompt you to enter the User Name (Login Name) and Email Address that are on file in our database. BOTH have to be exact matches, but are not case sensitive.

**New : Thin Client User Details**

Login details

Please enter your login name and email address. Both must match our records.

Login name:

Email address:

Upon entering your User Name (Login Name) and Email Address, click **Submit** and eAgent will email a temporary password to the email address on file. Then, click **Logon** to return to the Login screen.

If you don't know either your User Name (Login Name) or Email Address on file, please contact your Sales Manager for help.

You are now ready to start using eAgent!



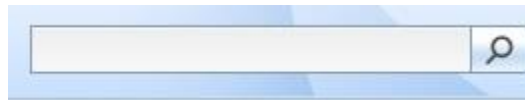
# Home Page / Main Menu

The home page consists of a search area (upper right corner), menu bar, scroll bars, and sometimes buttons to Save, Open records, or Refresh the current table.

Lead ID	First Name	Last Name	Lead Status	Address 1	Address 2	City	State	Zip	Phone	Cell	Consent Date
946.096	Tom	Matthews	Closed	1454 Miami Metro Blvd		Baltimore	MD	21211	+1 (410) 521-1897		9/29/2013
946.095	Joseph	Quinn	Pending	4045 Harrington st		Baltimore	MD	21217	+1 (410) 456-2861		9/4/2013
946.094	Sylvia	Prado	Pending	94845 Miguel St		Baltimore	MD	21217	+1 (410) 647-6881		7/17/2013
946.093	Lumen	Pierce	Pending	1096 Avenger Way		Baltimore	MD	21261	+1 (410) 647-6963		10/1/2013
946.092	Debra	Morgan	Closed	1417 Slice of Life		Baltimore	MD	21218	+1 (410) 533-2211		8/5/2013
946.091	Vince	Maulik	Pending	4090 Emeralds St		Baltimore	MD	21231	+1 (410) 298-2268		9/18/2013
946.090	Laura	Moser	Closed	17645 Container Dr		Baltimore	MD	21251	+1 (410) 982-2952		8/14/2013
946.089	Isaak	Sirko	Assigned	451 Koahka Ln		Baltimore	MD	21201	+1 (410) 806-3051		
946.088	Zach	Hamilton	Pending	176 Protegee Blvd		Baltimore	MD	21239	+1 (410) 518-8228		9/30/2013
946.087	Angel	Bekata	Pending	176 Juan Marcos Drive		Baltimore	MD	21202	+1 (410) 960-3010		9/29/2013
946.086	Maria	LaQueta	Pending	3215 Captains Way		Baltimore	MD	21205	+1 (410) 205-6228		9/14/2013
946.085	Brian	Moser	Assigned	488 68 Truck Cr		Baltimore	MD	21202	+1 (410) 755-8926		
946.084	Harry	Morgan	Closed	775 Imaginary Dr		Baltimore	MD	21215	+1 (410) 958-3073		8/5/2013
946.083	Oliver	Saxon	Assigned	5498 Pseudonym St		Baltimore	MD	21212	+1 (410) 724-5811		
946.082	Arthur	Mitchell	Assigned	1309 Trinity Cr		Baltimore	MD	21224	+1 (410) 155-2854		
946.081	Jacob	Elway	Assigned	9898 Private Dr		Baltimore	MD	21223	+1 (410) 284-7928		
946.080	Hannah	McKay	Closed	1330 Aconium St		Baltimore	MD	21229	+1 (410) 454-8884		9/5/2013
946.079	Evelyn	Vogel	Closed	275 Bayline Dr		Baltimore	MD	21210	+1 (410) 668-3810		10/1/2013
946.078	Rita	Bennett	Closed	3319 Meadow Ln		Baltimore	MD	21214	+1 (410) 245-2077		9/29/2013
946.077				8420 Palm Terrace							

## Search

The Search box is located in the top right-hand corner of every eAgent page. This function can be used to perform a quick search of select eAgent data.



To use, click in the empty search bar to see a drop-down list of searchable tables, and check the box next to your selection(s). Then, enter the name of the Lead whose record you want to find in a **LastName, FirstName** format. Press enter or click on the magnifying glass to have eAgent perform your search and return a list of all matching records for that Lead name, if any.

**Note:** This search bar *ONLY* searches for records by Lead name and will *NOT* search by any other criteria (e.g., Lead ID, Address, Lead Status, Date, Application ID, etc.). All queries *MUST* be in the **LastName, FirstName** format, though the entire name does not have to be entered.

For example: A search for John Smith could be done by looking up

- Smi
- Smith
- Smith, J
- Smith, John

## Menu Bar

The Menu bar is located across the top of every eAgent page. This is your main navigation tool allowing you access to the main functions within eAgent: Leads, Applications, Appointments, Reports, News, Site Links, and your Profile.

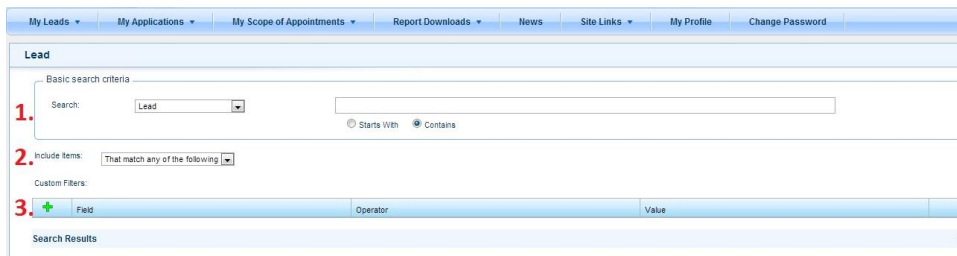


## Basic Table Navigation

Generally speaking, tables in eAgent have the same basic navigation features: Searching, Filtering, Grouping, and Sorting data. The Search and Filter options are only available from the Search pages (i.e., Search Leads, Search Applications, Search Scope of Appointments), while Grouping and Sorting is available in all tables.

## SEARCHING & FILTERING

There are several ways to conduct searches.



### 1. BASIC SEARCH CRITERIA:

- **Search:** You may select Agent, Agent activities, Applications, Leads, and Lead Appointment Scope.

**Note:** *Changing this field changes the table in which you are searching. For example, changing the search from “Lead” to “Applications” will cause you to search for Applications, NOT Leads, matching your search criteria.*

- **Starts with or Contains:** Searches by the name of the individual associated to the record ONLY; does NOT search by any other criteria (e.g., Lead ID, Address, State, Phone, etc.). Filters must be used to search for other special criteria.
  - **Starts With:** search must be for the Lead’s name in a **LastName, FirstName** format. Functions exactly as the Quick Search bar in the top right-hand side of eAgent (see the **Search** section on the previous page.)

- **Contains:** allows you to search by
  - First Name only (“John”) OR
  - Last Name (“Smith”) only OR
  - **LastName, FirstName** format (“Smith, John”).
  - Names formatted in any other manner (“John Smith”) will not return any results.

2. **INCLUDE ITEMS:** This applies **ONLY** to the Custom filters you can set below.

- **That match any of the following:** any results produced by the search must meet **AT LEAST ONE** of the filter criteria.
  - For Example: records in the state of “Texas” **OR** “Tennessee”
- **That match all of the following:** any results produced by the search must meet **ALL** of the filter criteria.
  - For Example: records in the state of “Texas” **AND** Lead Status is “Assigned”

3. **CUSTOM FILTERS:** This is an optional search criteria accessed by clicking the green plus under “Custom Filters. If filters are used, you must select the field, operator, and value that you want to filter by. Multiple filters can be added at once.

The screenshot shows a web application interface for a search function. At the top, there is a navigation bar with links: My Leads, My Applications, My Scope of Appointments, Report Downloads, News, Site Links, My Profile, and Change Password. Below this is the 'Basic Search' section. It includes a 'Basic search criteria' area with a search box containing 'Lead' and a dropdown menu. There are radio buttons for 'Starts With' and 'Contains'. Below that is an 'Include Items' section with a dropdown menu set to 'That match any of the following'. The 'Custom Filters' section features a table with columns for 'Field', 'Operator', and 'Value'. A green plus sign is circled in red next to the 'Field' column header. At the bottom, there is a 'Search Results' section and a 'Run Search' button.

Select your search criteria and click **Run Search** to initiate the search.

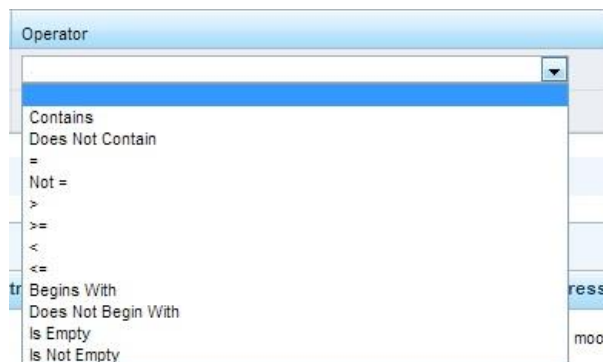
If any records match your search and filter criteria, they will be displayed in the search results screen. If **NO** records are displayed or you cannot find the record you are looking for, then check the search and filter criteria for accuracy.

## FILTER OPERATORS

When selecting Filters, there are three sections that must be completed:



1. **Field:** These are the column headings or fields you want to filter by
  - For Example: First Name, Last Name, Lead Status, State, etc.
2. **Operator:** This section defines the criteria for the Values you are looking for. Different **Operators** display depending on the **Field** you previously selected



- **Contains**
  - Table will ONLY display results where the **Field** CONTAINS the text typed into the **Value** section
  - For Example: Address Line 1 CONTAINS “Main St”
- **Does Not contain**
  - Table will ONLY display results where the **Field** DOES NOT CONTAIN the text typed into the **Value** section
  - For Example: Email DOES NOT CONTAIN “@yahoo”
- **=**
  - Table will ONLY display results where the **Field** EQUALS the **Value** section
  - For Example: Lead Status EQUALS “Pending”
- **Not =**
  - Table will ONLY display results where the **Field** DOES NOT EQUAL the **Value** section
  - For Example: Lead Status NOT EQUAL to “Closed”
- **>**
  - Table will ONLY display results where the **Field** is GREATER THAN the **Value** section, not including the Value entered
  - For Example: App Signed Date is GREATER THAN 10/01/2013

- **>=**
    - Table will ONLY display results where the **Field** is **GREATER THAN OR EQUAL TO** the **Value** section, including the value entered
    - For Example: App Signed Date is GREATER THAN OR EQUAL TO 10/01/2013
  - **<**
    - Table will ONLY display results where the **Field** is **LESS THAN** the **Value** section not including the value entered
    - For Example: App Signed Date is LESS THAN 10/01/2013
  - **<=**
    - Table will ONLY display results where the **Field** is **LESS THAN OR EQUAL TO** the **Value** section, including the value entered
    - For Example: App Signed Date is LESS THAN OR EQUAL TO 10/01/2013
  - **Begins With**
    - Table will ONLY display results where the **Field** **BEGINS WITH** the text in the **Value** section
    - For Example: Last Name BEGINS WITH “Smi”
  - **Does Not Begin With**
    - Table will ONLY display results where the **Field** **DOES NOT BEGIN WITH** the text in the **Value** section
    - For Example: Zip DOES NOT BEGIN WITH “75”
  - **Is Empty**
    - Table will ONLY display results where the **Field** **IS EMPTY** (i.e., contains no data)
    - For Example: Pending Follow-Up Date IS EMPTY
  - **Is Not Empty**
    - Table will ONLY display results where the **Field** **IS NOT EMPTY** (i.e., contains data of any kind)
    - For Example: Cell IS NOT EMPTY
3. **Value:** This is the value of the **Field** (above) you want to reference in your Filter.
- For Example: if **Field** is set to “Lead Status,” then a possible **Value** you could filter for is “Closed”

## TROUBLESHOOTING SEARCHES

If, when you run a search, you cannot find the record you are looking for, make sure that:

- The name in the Search box is formatted and spelled correctly
  - For Example: **LastName, FirstName** OR just **FirstName** OR just **LastName**

- Incorrect Filters are not blocking your search
  - o For Example: Setting **Include Items** to “That match all of the following” and adding two filters to find leads in “Texas” AND “Tennessee”
  - o For Example: Looking for leads in Tennessee, but setting the filter is for Texas
- Incorrect Filter Operators are not blocking your search
  - o For Example: Setting the **Operator** to “Not =” when you really want “=”
  - o For Example: Setting the **Operator** to “>=” (greater than or equal to) when you really want “<=” (less than or equal to)
- You are searching the correct table
  - o For Example: Looking for a Lead, but accidentally setting the Search to Applications

If you still cannot find the appropriate record, please manually search for the record in the All Leads table (click on the **My Leads** Menu Bar item) before contacting Support.

**Note:** *If a record is missing or inaccurate, please notify your sales manager.*

## GROUPING / SORTING

**SORTING:** In a table, you can click on the column headers (e.g., Lead ID, First Name, Last Name, etc.) and Sort the records by that column. You can only sort by one column at a time.

- *Clicking on the heading once will sort by ascending values (alpha-numerically 0-9, A-Z), and clicking on it a second time will sort by descending values (alphanumerically Z-A, 9-0).*

Lead ID	First Name	Last Name	Lead Status	Address 1	Address 2	City	State	Zip	Phone	Cell	Consent Date
940.087	Angel	Batista	Pending	176 Juan Marcos Dr		Baltimore	MD	21202	+1 (410) 962-3010		9/26/2013
940.078	Rita	Bennett	Closed	3318 Meadow Ln		Baltimore	MD	21214	+1 (410) 245-2077		9/29/2013
940.081	Jacob	Elvay	Assigned	9690 Private Dr		Baltimore	MD	21223	+1 (410) 264-7028		
940.088	Zach	Hambon	Pending	178 Protegee Blvd		Baltimore	MD	21239	+1 (410) 518-6268		9/30/2013
940.086	Maria	LaGunta	Pending	3215 Captains Way		Baltimore	MD	21205	+1 (410) 308-6230		9/14/2013
940.091	Vince	Masula	Pending	4099 Innuendo St		Baltimore	MD	21231	+1 (410) 296-2280		9/16/2013
940.096	Tom	Mathews	Closed	1454 Ilwaco Metro Blvd		Baltimore	MD	21211	+1 (410) 521-1887		9/29/2013
940.080	Hannah	McKey	Closed	1330 Acornum St		Baltimore	MD	21229	+1 (410) 454-0884		9/5/2013
940.082	Arthur	Mitchell	Assigned	1309 Trinky Cr		Baltimore	MD	21224	+1 (410) 162-2654		
940.077	Dexter	Morgan	Closed	8420 Palm Terrace #108		Baltimore	MD	21213	+1 (410) 126-2640		8/7/2013
940.084	Harry	Morgan	Closed	775 Imaginary Dr		Baltimore	MD	21215	+1 (410) 958-8072		8/5/2013
940.092	Debra	Morgan	Closed	1417 Stop of Life		Baltimore	MD	21216	+1 (410) 826-2411		8/5/2013
940.080	Brian	Moser	Assigned	486 Ica Truck Cr		Baltimore	MD	21202	+1 (410) 725-6688		
940.090	Laura	Moser	Closed	17645 Contender Dr		Baltimore	MD	21251	+1 (410) 397-2967		8/14/2013
940.093	Lumen	Pierce	Pending	1088 Avenger Way		Baltimore	MD	21251	+1 (410) 647-4963		10/1/2013
940.094	Sylvia	Prado	Pending	94845 Miquel St		Baltimore	MD	21217	+1 (410) 647-4661		7/17/2013
940.095	Joseph	Quinn	Pending	4045 Harrington st		Baltimore	MD	21217	+1 (410) 486-2061		9/4/2013
940.083	Oliver	Saxon	Assigned	5498 Pseudonym St		Baltimore	MD	21212	+1 (410) 724-5811		
940.089	Isaac	Sink	Assigned	451 Kasha Ln		Baltimore	MD	21201	+1 (410) 806-3051		

**GROUPING:** Records can also be Grouped by dragging the column name into the small space just above the column headers labeled “Drag a column header and drag it here to group by that column.”

- Dragging the **Lead Status** header into that space, for example, will group all records by State and place line breaks between the different groups of states for easy viewing.

The screenshot shows the 'My Leads' page in the Cigna HealthSpring system. The table is grouped by 'Lead Status'. The 'Assigned' group contains 5 records, and the 'Closed' group contains 6 records. All records are for Baltimore, MD. The table columns are: Lead Id, First Name, Last Name, Lead Status, Address 1, Address 2, City, State, Zip, Phone, Cell, and Consent Date.

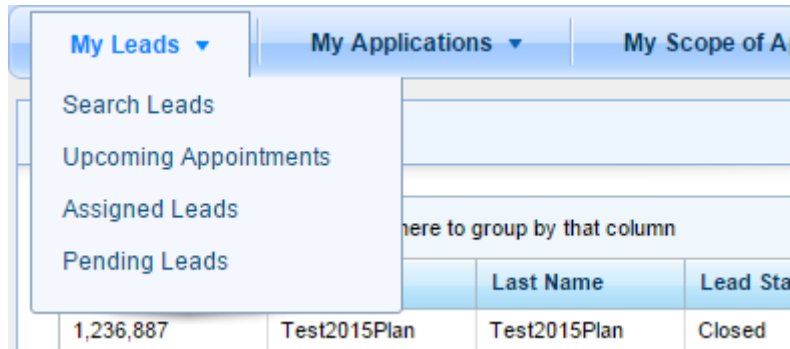
Lead Id	First Name	Last Name	Lead Status	Address 1	Address 2	City	State	Zip	Phone	Cell	Consent Date
▼ Lead Status: Assigned											
946.081	Jacob	Elvay	Assigned	9698 Private Cr		Baltimore	MD	21223	+1(410) 284-7028		
946.082	Arthur	Michel	Assigned	1309 Trinity Cr		Baltimore	MD	21224	+1(410) 355-2654		
946.083	Oliver	Saxon	Assigned	5488 Pseudonym St		Baltimore	MD	21212	+1(410) 724-6611		
946.085	Brian	Moser	Assigned	406 Ice Truck Cr		Baltimore	MD	21202	+1(410) 753-6626		
946.089	Isaak	Sirko	Assigned	451 Koshka Ln		Baltimore	MD	21201	+1(410) 865-2661		
▼ Lead Status: Closed											
946.077	Dexter	Morgan	Closed	8420 Pam Terrace #105		Baltimore	MD	21213	+1(410) 326-2650		9/7/2013
946.076	Ria	Bennett	Closed	3319 Meadow Ln		Baltimore	MD	21214	+1(410) 245-2672		9/29/2013
946.079	Evelyn	Vogel	Closed	275 Bayline Dr		Baltimore	MD	21210	+1(410) 868-3619		10/12/2013
946.080	Hannah	McKay	Closed	1330 Acornum St		Baltimore	MD	21229	+1(410) 454-0884		9/5/2013
946.084	Harry	Morgan	Closed	775 Imaginary Dr		Baltimore	MD	21215	+1(410) 868-8079		8/5/2013
946.090	Laura	Moser	Closed	17645 Contaner		Baltimore	MD	21251	+1(410) 867-2661		8/14/2013

Total Records: 20

# My Leads

This function allows you to access and search all your Leads in eAgent. You can view All Leads, Search Leads for a specific record or groups of records, see all Upcoming Appointments, view all Assigned Leads, or view all Pending Leads.

Hovering over the “My Leads” heading will display a dropdown of other selection items, while clicking on the “My Leads” heading will display ALL Leads associated to you.



## All Leads

To view all leads, click on the Menu Bar item titled **My Leads**. This will bring up a list of ALL Leads associated to you and their Lead details.

You can then select the specific Lead by making clicking on the line and selecting **Open** (you can also double-click the item to open).

Lead Id	First Name	Last Name	Lead Status	Address 1	Address 2	City	State	Zip
1,236,887	Test2015Plan	Test2015Plan	Closed	111	111111	Prattville	AL	36067
1,235,702	TestCitrix	TestCitrix	Closed	111111	CTX12345678901	Pikesville	MD	21208
1,229,035	TestClosedBRC	TestClosedBRC	Closed	111	222	Baltimore	MD	21224
1,227,588	DisasterTX	DisasterTX	Closed	11111	11	Dallas	TX	75231
1,227,171	TestIL	TestIL	Closed	111 Water		Joliet	IL	60435
1,221,749	testststs	testststs	Closed	11	222	Baltimore	MD	21224
1,220,348	TestprodBM812	TestprodBM812	Closed	111bb		Baltimore	MD	21224
1,215,550	TestNewForm	TestNewForm	Closed	111		Mobile	AL	36693
1,169,481	TestBkCICgg	TestBkCIC	Closed	11 TestBkCIC	11	Baltimore	MD	21224
1,042,922	TestIN	TestIN	Closed	111		Gary	IN	46403
1,021,963	Testtprod	Testtprod	Closed	111		Baltimore	MD	21209
1,021,962	testprodc	testprodc	Closed	111		baltimore	md	21208
1,015,200	testtprod	testtprod	Closed	111		baltimore	md	21202
1,008,639	testnewleadtc	testnewleadtc	Closed	1111		baltimore	md	21202
995,506	TestCarolinas	TestCarolinas	Closed	111		Concord	NC	28025
995,277	TestAZ	TestAZ	Pending	111		Phoenix	AZ	85001
994,809	TestBMM0822	TestBMM0822	Closed	1111		Baltimore	MD	21202



## Search Leads

Selecting the Search Leads option will open a page displaying various search options. To learn more about the various Searching features, please reference the section above called **Searching** (under the [Home Page / Main Menu](#) then [Basic Table Navigation](#) headings).

Clicking on **Run Search** without selecting any Search or filter criteria will display ALL Leads in the table below.

## Upcoming Appointments

This section displays all upcoming in-home appointments scheduled (i.e., all future appointments). Past appointments will not display here.

You can then select the specific appointment by making clicking on the line and selecting **Open** (you can also double-click the item to open).

Lead Id	Lead	Appt Date	Start Time	Address 1	Address 2	City	State	Zip
38,667		12/1/9864	6:00:00 AM			Mount Ranier	MD	20712

## Assigned Leads

This section displays all leads assigned to you that have a Lead Status of “Assigned.” Leads that have a “Closed” or “Pending” status will not display here.

You can then select the specific Lead by clicking on the line and selecting **Open** (you can also double-click the item to open).

Lead Id	First Name	Last Name	Lead Status	Address 1	Address 2	City	State	Zip	Phone	Cell	Consent Date
948,593			Assigned			Tyler	TX	75702			4/8/2013

Total Records: 1

## Pending Leads

This section displays all Leads assigned to you that have a Lead Status of “Pending.” Leads that have a “Closed” or “Assigned” status will not display here.

You can then select the specific Lead by clicking on the line and selecting **Open** (you can also double-click the item to open).

Lead Id	First Name	Last Name	Lead Status	Address 1	Address 2	City	State	Zip	Phone	Cell	Consent Date
197,338			Pending			Croaby	TX	77532			
112,471			Pending			San Antonio	TX	78222			2/12/2013

Total Records: 2

Buttons: Open, Open in new window, Refresh

## Lead Details

In the above tables, you can open a Lead by selecting the Lead and clicking the Open button at the bottom or by double-clicking on the record. This will display information about the Lead such as their Profile, their Disposition status, their Applications, and any past Activities.

## PROFILE

This section displays the Lead’s profile in a READ-ONLY view (i.e., information on this page cannot be edited or updated).

Lead : TestAZ, TestAZ

Profile | Disposition | Applications | Activities

Personal Information

Lead Id: 995,277 | First Name: TestAZ | Middle Initial: | Last Name: TestAZ | Suffix: |

Address 1: 111 | Address 2: | City: Phoenix | State: AZ | County: Maricopa (AZ) | Zip: 85001

Phone: +1 (111) 111-1111 | Cell: | Email: |

Birthdate: | Part A Effective Date: | Part B Effective Date: | LIS: |

Agent Information

Agency: Test Bravo Health FMO-GA | Agent: TestNew, TestNew

Consent to Contact Information

Consent to Contact: | Consent to Contact Date: |

## DISPOSITION

This section displays and allows you to change / update the Lead's current Disposition. Only ONE Disposition may be selected at a time, and changing the Disposition may change the Lead Status or require additional details below

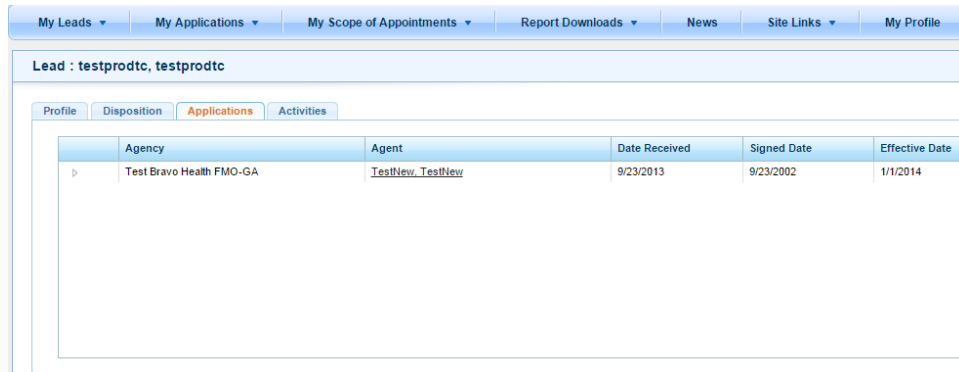
The screenshot shows a web application interface for managing a lead. At the top, there is a navigation bar with menu items: My Leads, My Applications, My Scope of Appointments, Report Downloads, News, Site Links, and My Profile. Below this, the page title is "Lead : TestAZ, TestAZ". The main content area has four tabs: Profile, Disposition (which is active), Applications, and Activities. The "Disposition" section contains a "Lead Status" dropdown menu currently set to "Pending". Below this are five radio buttons for selecting a disposition: "Enrolled", "Not Eligible", "Not Interested", "Unable to Contact", and "Pending". The "Pending" radio button is selected. Underneath, there are three dropdown menus for "Disposition Reasons and Dates": "Not Eligible Reason", "Not Interested Reason", and "Unable to Contact Reason". Below these are two more dropdown menus: "Pending Reason" (set to "Reviewing Plan Ir") and "Pending Follow-Up Date" (set to "11/20/2013"). At the bottom of the form is a "Notes" section with a text area.

### Disposition Types

- Enrolled:
  - o *changes the Lead Status to **Closed***
  - o *(no additional information required)*
- Not Eligible:
  - o *changes the Lead Status to **Closed***
  - o **Not Eligible Reason** required in the section below
- Not Interested:
  - o *changes the Lead Status to **Closed***
  - o **Not Interested Reason** required in the section below
- Unable to Contact:
  - o *changes the Lead Status to **Closed***
  - o **Unable to Contact Reason** required in the section below
- Pending:
  - o *changes the Lead Status to **Pending***
  - o **Pending Reason** and **Pending Follow-Up Date** required in the section below

## APPLICATIONS

This displays the Lead's list of Applications in a table. Clicking on the small arrow to the left of the Application will redirect you to that Application's details (also viewable by searching for the Application under the **My Applications** heading and opening the record).

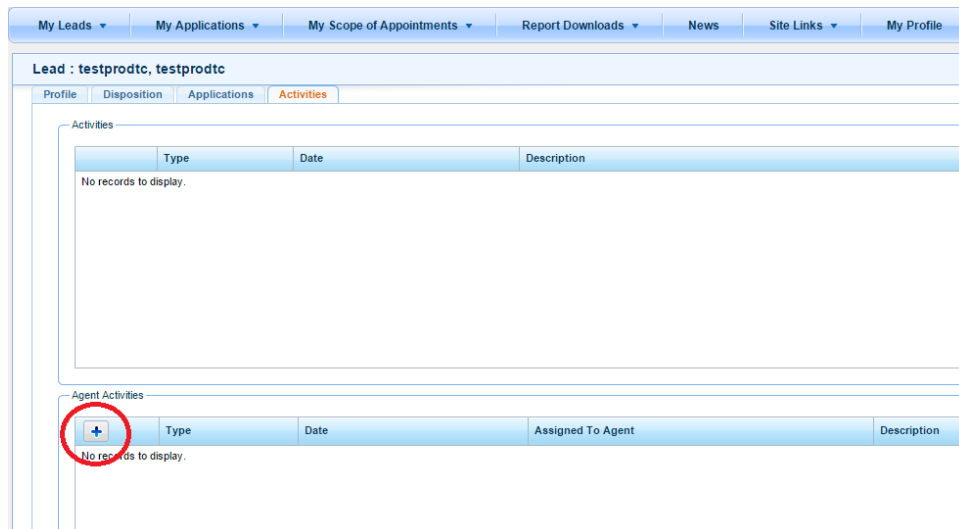


The screenshot shows the 'Applications' tab for a lead named 'testprodtc, testprodtc'. The table below lists one application record.

	Agency	Agent	Date Received	Signed Date	Effective Date
▶	Test Bravo Health FMO-GA	<a href="#">TestNew_TestNew</a>	9/23/2013	9/23/2002	1/1/2014

## ACTIVITIES

This displays a historical list of events or activities that have been entered for this Lead. The top section displays Fulfillment and BRC activities, and the bottom section lists all Appointments and other Agent-created Activities.



The screenshot shows the 'Activities' and 'Agent Activities' tabs for the same lead. The 'Activities' section is currently empty, and the 'Agent Activities' section has a '+' icon circled in red, indicating where to click to add a new activity.

Type	Date	Description
No records to display.		

+	Type	Date	Assigned To Agent	Description
No records to display.				

A new Activity can be entered by clicking on the + sign in the Agent Activities table (circled in red above). Once the appropriate information has been entered for the Activity, simply click **Save & Close**.

# My Applications

This function allows you to access to Lead Applications. You can view All Applications, Search Applications for a specific record or groups of records, see Applications that are Incomplete or have been Rejected in the last 30 days, see all Applications Submitted in the Last 30 days, and search Applications by a specific Effective Date

Hovering over the “My Applications” heading will display a dropdown of other selection items, while clicking on the “My Applications” heading will display ALL Applications associated to you.



## All Applications

To view All Applications, click on the Menu Bar item titled My Applications . This will bring up a list of ALL Applications associated to you.

You can then select the specific application by clicking on the line and selecting **Open** (you can also double-click the item to open).

Application Id	Lead	Application Status	Signed Date	Received Date	Date Entered	Effective Date	Plan	Agency	Agent
654.757	TestRMM08022 TestRMM08022	Void	9/27/2013	9/26/2013	9/26/2013	1/1/2014	Achieve - Maryland (1/1/2014)	Test Bravo Health FMO-GA	TestNew_TestNew
654.756	TestRMM08022 TestRMM08022	Void	9/27/2013	9/26/2013	9/26/2013	12/1/2013	Essential MD/DE (1/1/2013)	Test Bravo Health FMO-GA	TestNew_TestNew
653.963	TestR0000_TestR0000	Void	9/23/2013	9/23/2013	9/23/2013	1/1/2014	Select Mid-Atlantic (1/1/2013)	Test Bravo Health FMO-GA	TestNew_TestNew
596.320	Berger_Bubz	Void	1/11/2013	1/11/2013	1/11/2013	1/1/2013	HealthSpring Advantage TN (HMO) (1/1/2013)	Test Bravo Health FMO-GA	TestNew_TestNew
653.962	testprod0_testprod0	Void	9/23/2002	9/23/2013	9/23/2013	1/1/2014	Select Mid-Atlantic (1/1/2013)	Test Bravo Health FMO-GA	TestNew_TestNew
687.661	TEST_LINDA	Void	11/14/1999	11/14/2013	11/14/2013	11/1/1999	Prefered - MD/DE (1/1/2014)	Test Bravo Health FMO-GA	TestNew_TestNew

Total Records: 6

## Search Applications

Selecting the Search Applications option will open a page displaying various search options. To learn more about the various Searching features, please reference the section above called **Searching** (under the [Home Page / Main Menu](#) then [Basic Table Navigation](#) headings).

Clicking on **Run Search** without selecting any Search or filter criteria will display ALL Applications in the table below.

## Applications Incomplete & Rejected Last 30 days

This section displays all Applications that are either flagged as “Incomplete” or that have been rejected within the last 30 days. If records are found meeting those criteria, they will be listed on the screen.

Application Id	Lead	Application Status	Signed Date	Received Date	Date Entered	Effective Date	Plan	Agency	Agent
651,557	[REDACTED]	Incomplete - Invalid HIC Number	9/9/2013	9/9/2013	9/10/2013	10/1/2013	Classic New Jersey (1/1/2013)	[REDACTED]	[REDACTED]
651,192	[REDACTED]	RFI	9/7/2013	9/9/2013	9/9/2013	10/1/2013	HealthSpring Premier NGA (HMO-POS) (1/1/2013)	[REDACTED]	[REDACTED]
651,197	[REDACTED]	RFI	9/6/2013	9/7/2013	9/9/2013	10/1/2013	HealthSpring Preferred TH (HMO) (1/1/2013)	[REDACTED]	[REDACTED]
650,588	[REDACTED]	RFI	9/4/2013	9/4/2013	9/4/2013	10/1/2013	HealthSpring TotalCare TX H4513 (HMO SNP) (1/1/2013)	[REDACTED]	[REDACTED]
651,011	[REDACTED]	Incomplete - Other	9/4/2013	9/5/2013	9/8/2013	10/1/2013	Achieve Essential MD/DE (1/1/2013)	[REDACTED]	[REDACTED]
650,591	[REDACTED]	RFI	9/4/2013	9/4/2013	9/4/2013	12/1/2013	HealthSpring Preferred TX H4513 (HMO) (1/1/2013)	[REDACTED]	[REDACTED]
650,324	[REDACTED]	RFI	8/30/2013	8/30/2013	9/4/2013	9/1/2013	HealthSpring Preferred TX H4513 (HMO) (1/1/2013)	[REDACTED]	[REDACTED]

Total Records: 29

## Applications Last 30 Days

This section displays all Applications that have been submitted in the last 30 days. If records are found meeting those criteria, they will be listed on the screen.

Application Id	Lead	Application Status	Signed Date	Received Date	Date Entered	Effective Date	Plan	Agency	Agent
652,321	[REDACTED]	Enrolled	9/13/2013	9/13/2013	9/13/2013	10/1/2013	HealthSpring Preferred TX H2165 (HMO) (1/1/2013)	[REDACTED]	[REDACTED]
651,962	[REDACTED]	Enrolled	9/12/2013	9/12/2013	9/12/2013	10/1/2013	HealthSpring TotalCare TX H4513 (HMO SNP) (1/1/2013)	[REDACTED]	[REDACTED]
652,103	[REDACTED]	Enrolled	9/12/2013	9/12/2013	9/12/2013	10/1/2013	HealthSpring TotalCare TX H4528 (HMO SNP) (1/1/2013)	[REDACTED]	[REDACTED]
652,104	[REDACTED]	Enrolled	9/12/2013	9/12/2013	9/12/2013	10/1/2013	HealthSpring TotalCare TX H4513 (HMO SNP) (1/1/2013)	[REDACTED]	[REDACTED]
652,105	[REDACTED]	Enrolled	9/12/2013	9/12/2013	9/12/2013	10/1/2013	HealthSpring Preferred TX H4528 (HMO) (1/1/2013)	[REDACTED]	[REDACTED]
652,124	[REDACTED]	Enrolled	9/12/2013	9/13/2013	9/13/2013	10/1/2013	HealthSpring TotalCare AL (HMO SNP) (1/1/2013)	[REDACTED]	[REDACTED]
652,123	[REDACTED]	Enrolled	9/12/2013	9/12/2013	9/12/2013	10/1/2013	HealthSpring TotalCare TX H4513 (HMO SNP) (1/1/2013)	[REDACTED]	[REDACTED]

Total Records: 233

## Applications by Effective Date

This section displays all Applications that have an Effective Date matching the one entered in the Effective Date search box. If records are found meeting those criteria, they will be listed on the screen. If no records are found, the system will open a screen similar to this:



## Application Details

In the above tables, you can open an Application by selecting the record and clicking the Open button at the bottom or by double-clicking on the record. This will display the Application details in a READ-ONLY format (i.e., information on this page cannot be edited or updated).

**Application: testprodtc, testprodtc**

**Lead Details**

Lead Id	HIC	Lead
1,021,962	5675677654	testprodtc, testprodtc

**Application Details**

Application Id	Plan	Plan Change?	
653,962	Select Mid-Atlantic (1/1/2013)	No	
Effective Date	Signed Date	Date Received	Date Entered
1/1/2014	9/23/2002	9/23/2013	9/23/2013
Election Period	Source	Status	
AEP	Telephonic	Void	

**Agent Details**

Agent	TestNew, TestNew	
General Agency	MGA	Test Bravo Health FMO-GA
SGA	FMO	

# My Scope of Appointments

This section allows you to manage your scheduled in-home appointments for your Leads. You can Search Scope of Appointments for all records or a specific record or a group of records, see all Upcoming Appointments, and search for a specific appointment by Confirmation Number.

Hovering over the “My Scope of Appointments” heading will display a dropdown of other selection items.

The screenshot shows a navigation menu with 'My Leads', 'My Applications', and 'My Scope of Appointments'. The 'My Scope of Appointments' dropdown is open, showing options: 'Search Scope of Appointments', 'Scopes for Upcoming Appointments', and 'Scope Confirmation Number'. Below the menu is a table titled 'Lead - My Leads' with columns: Lead Id, First Name, Last Name, Status, and Confirmation Number. The table contains three rows of data.

Lead Id	First Name	Last Name	Status	Confirmation Number
1,236,887	Test2015Plan	Test2015Plan	Closed	111
1,235,702	TestCitrix	TestCitrix	Closed	111111
1,229,035	TestClosedBRC	TestClosedBRC	Closed	111

## Search Scope of Appointments

Selecting the Search Scope of Appointments option will open a page displaying various search options. To learn more about the various Searching features, please reference the section above called **Searching** (under the [Home Page / Main Menu](#) then [Basic Table Navigation](#) headings).

Clicking on **Run Search** without selecting any Search or filter criteria will display ALL Scope of Appointments in the table below.

## Scope for Upcoming Appointments

This section displays all upcoming appointments for your assigned leads. If records are found meeting those criteria, they will be listed on the screen. If no records are found, the system will open a screen similar to this:

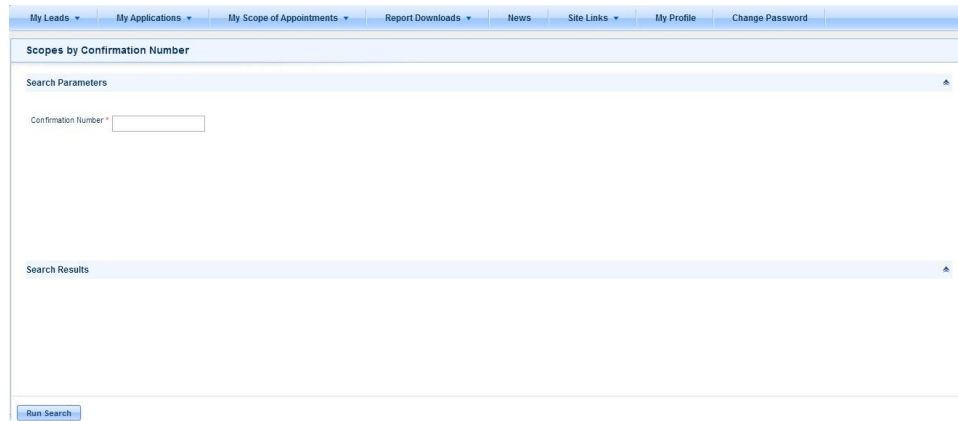
The screenshot shows a navigation menu with 'My Leads', 'My Applications', 'My Scope of Appointments', 'Report Downloads', 'News', 'Site Links', 'My Profile', and 'Change Password'. Below the menu is a message box with an information icon and the text: 'The requested Search was executed successfully but returned 0 records'.



## Scope Confirmation Number

This section displays all Scope of Appointments that have a Confirmation Number matching the one entered in the Confirmation Number search box. If records are found meeting those criteria, they will be listed on the screen. If no records are found, the system will open a screen similar to this:

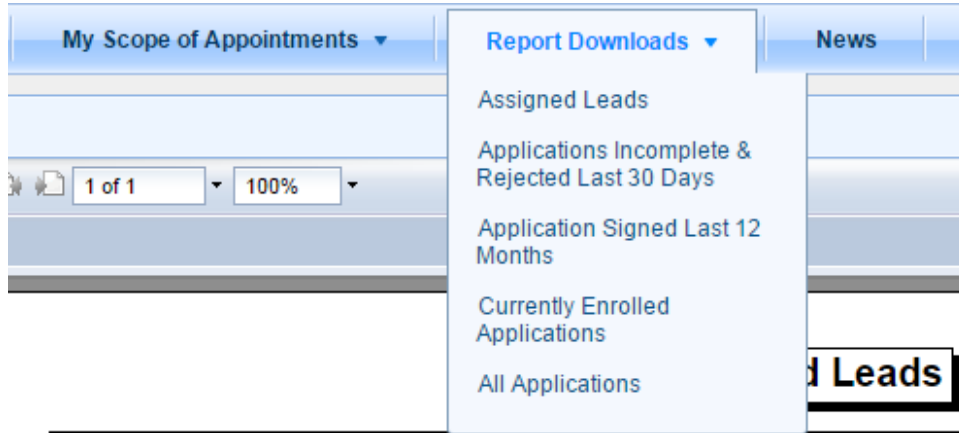
**Note:** *Be sure to type in a FULL confirmation number, the results must be an exact match. Partial confirmation numbers will return no results.*



The screenshot shows a web application interface with a navigation bar at the top containing links: My Leads, My Applications, My Scope of Appointments, Report Downloads, News, Site Links, My Profile, and Change Password. Below the navigation bar is a section titled "Scopes by Confirmation Number". This section contains a "Search Parameters" area with a "Confirmation Number" input field. Below the input field is a "Search Results" area, which is currently empty. At the bottom left of the search area is a "Run Search" button.

## Report Downloads

This section allows you to view and download reports for Assigned Leads, Application that are Incomplete or have been Rejected in the Last 30 Days, Applications Signed within the Last 12 Months, and your Currently Enrolled Applications Book of Business. Once a report has been generated, it can be printed or exported into a format of your choosing such as PDF or Excel file.



### Assigned Leads

Selecting **Assigned leads** will generate a report listing all Leads assigned to you regardless of Lead Status.

Lead ID	Lead Status	MaxAge	IntAppID	Consen	it to Contact Date	First Name	Last Name	Address 1	Address 2	City	State	Zip	Phone
995,277	Pending					TestAZ	TestAZ	111		Phoenix	AZ	85001	+1 (111) 111-1111

## Applications Incomplete & Rejected last 30 days

Selecting **Applications Incomplete and Rejected Last 30 Days** will generate a report listing all applications marked as incomplete or that have been rejected within the last 30 days.

Fir st Na me	La st Na me	Ad dres s 1	Ad dres s 2	Cit y	Sta te	Zip	Pho ne	EH Le ad ID	Ap pli cat ion Sta tus	EH Le ad ID	Ap pli cat ion ID	Ap pli cat ion Int	Ap p Dat e Re cei ve d	Ap p Eff ec tive Date	Ap p Dat e En tere d	Ag ent Na me	EH Ag ent Na me	GA A Na me	MG A Na me	SG A Na me	FM O Na me	

## Applications Signed Last 12 Months

Selecting **Applications Signed Last 12 Months** will generate a report listing all applications marked as complete in the last 365 days.

Fir st Na me	La st Na me	HI C	Da te of Bir th	Me m be r ID	Ad dres s 1	Ad dres s 2	Cit y	St ate	Zip	Pho ne	EH Le ad ID	Ap pli cat ion ID	Ap pli cat ion Sta tus	Ap p Sig ned Date	Ap p Dat e Re cei ve d	Ap p Eff ec tive Date	Ap p Dat e En tere d	Ag ent Na me	EH Ag ent Na me	GA A Na me	MG A Na me	SG A Na me	FM O Na me	
Te st cpr od	st t cpr od	00 00 00 0X	1/1/1940	11			Bal tim ore	M D 9	21 20 9	1-963-963-963	EH	Ap pli cat ion ID	roll ed	3/8/2013	2012/01/23	2012/01/23	2012/01/23	Te ct Mi d- Ant ic	A2 Ne w, Te st Ne w	Te st 00 Br av o He alt h FM O				Te st Br av o He alt h FM O

## Currently Enrolled Applications

This report shows all active enrollments.

First Name	Last Name	Date of Birth	Address 1	Address 2	City	State	Zip	Phone	Application Status	Member ID	Lead ID	Application ID	Application Signed Date	Effective Date	Application Date Entered	Plan Name	Agent Name	EH Agent Name	GA Agent Name	MA Agent Name	SG Agent Name	FMO Name	HI C
------------	-----------	---------------	-----------	-----------	------	-------	-----	-------	--------------------	-----------	---------	----------------	-------------------------	----------------	--------------------------	-----------	------------	---------------	---------------	---------------	---------------	----------	------

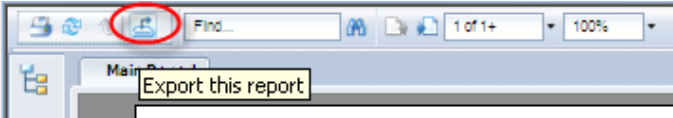
## All Applications

This report shows all applications regardless of Application Status.

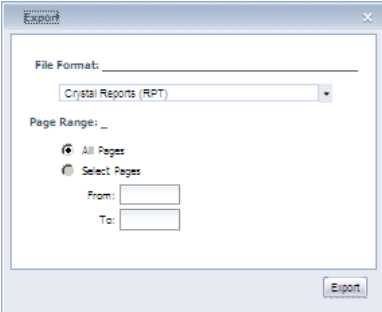
First Name	Last Name	HI C	Individual Date of Birth	Member ID	Address 1	Address 2	City	State	Zip	Phone	Lead ID	Application ID	Application Signed Date	Effective Date	Application Date Entered	Application Status	Plan Name	Agent Name	EH Agent Name	Name	Name	Name	
LI	TE	pp	11/1/2001	TE	BA	M	21	1228.3687.661	11/14/11	9911094/26113	Pr	Te	A2	Te	Te	Te	Te	Te	Te	Te	Te	Te	
ND	ST	pp		ST	LTI	D	20	22															
A		pp		RE	M	OR	1	33															
		pp		ET	E			34															
		pp						44															
		pp						4															

# Exporting Reports

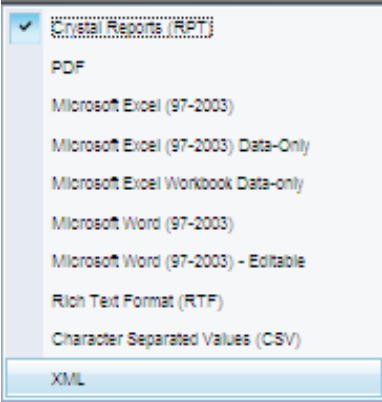
You can export any of the reports by running the report, then clicking on the Export the Report button.



Once you click the Export the Report button, you will be given this screen to select your file format and page ranges.



The default is Crystal Reports, but you can choose any of the formats in this list.



Once you have chosen the preferred format, click on **Export** and a raw data file will be exported like the one below (The example shown below is Excel).

	A	B	C	D	E	F	G	H	I	J	K
1	First Name	Last Name	HIC	Individual Date of Birth	MemberId	Address line 1	Address line 2	City	State	Zip	Phone
2	LINDA	TEST	pppppppppppp	1/1/2001		TEST STREET		BALTIMORE	MD	21201	1222334444
3	testprodc	testprodc	5675677654	1/1/1940		111		baltimore	md	21208	+1 () -
4	Ruby	Berger	123456789a	3/17/1925		831 Walnut St		Madison	TN	37115	16158684187
5	Testtccprod	Testtccprod	000000000X	1/1/1940		111		Baltimore	MD	21209	+1 () -
6	TestBMM0822	TestBMM0822	4564564567	1/1/1940		1111		Baltimore	MD	21202	11111111111
7	TestBMM0822	TestBMM0822	4564564567	1/1/1940		1111		Baltimore	MD	21202	11111111111
8	dvd54407		1								
9											
10											

# News

This function allows you to view the latest news shared from Cigna-HealthSpring. These items are usually CMS driven or compliance driven to ensure you are aware of changes to business requirements or to processes.

Short Description
CMS has released new guidance concerning appearances at put

To select an item, click on the line to highlight and click **Open** (or you can double-click the item to perform the same function).

**News: 10/25/2007: Press Release - New CMS Guidance on Public Appearances**

**Title:**  
New CMS Guidance on Public Appearances

**Description:**

To our Valued Agents,

Please review the following information regarding CMS guidance on public appearances in such venues as talk shows, conferences, assisting charitable organizations, etc. It is very important you adhere to the following guidance:

- If Bravo Health Sales staff will be present at a public appearance and representing the company, then Bravo Health needs to follow CMS guidance in terms of sales and marketing practices, sales events and marketing material.
- Anyone representing Bravo Health needs to make it clear that they represent the company and not the Federal Government for the Medicare program.

Also, please remember, that Bravo Health has to notify CMS 30 days in advance of any sales events or meetings. Again, this includes group meetings, seminars, health fairs and sales events for Medicare Advantage being done for PFFS, PDP, MA and MAPD. This communication was distributed in a prior alert. If Bravo has not received notification of a sales event, then Bravo CANNOT be marketed at the meeting.

As an agent for Bravo Health, it is also very important that when you are marketing Bravo Medicare Advantage plans in any capacity, you must make it clear to the beneficiary that you represent Bravo Health. You cannot state that you represent the Federal Government for the Medicare program. Again, this is a violation of CMS marketing guidelines.

There are no exceptions to any of these policies, and if CMS and/or Bravo are notified of any violations, there could be possible suspension or termination of your appointment with Bravo Health.

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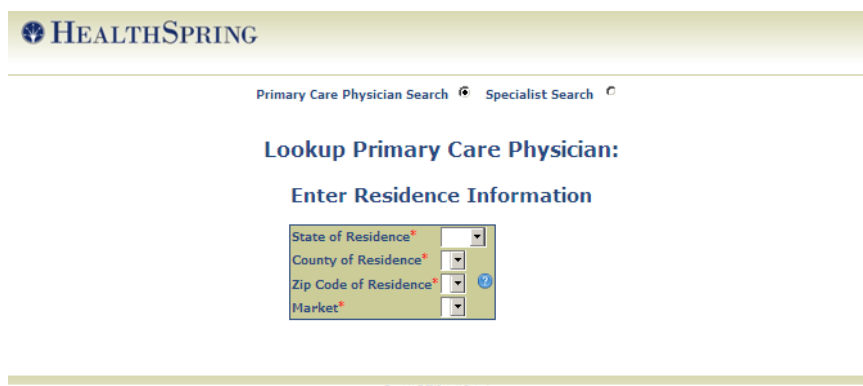
## Site Links

This function allows access to the most recent Cigna-HealthSpring released PCP (Primary Care Physician) provider directory, links to AHIP test exams, and PinPoint – Cigna-HealthSpring’s training website.



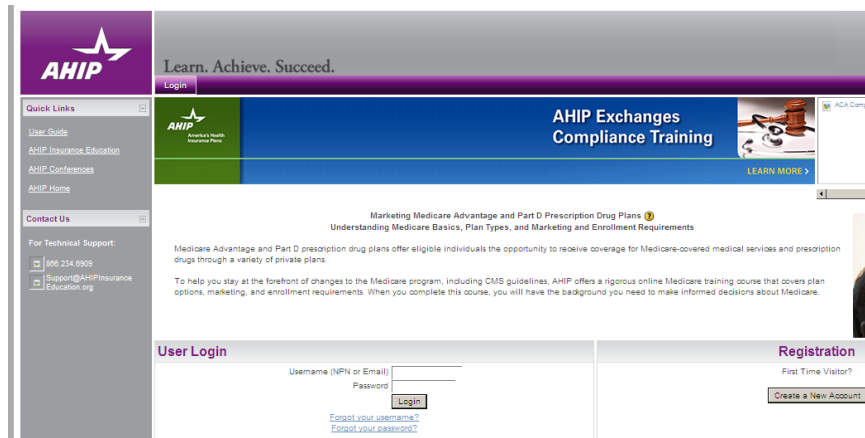
## Provider Directory

This URL links you to the most recent PCP (Primary Care Physician) list. To access the list, click on **Provider Directory**, and you will be linked to Cigna/HealthSpring website.




## AHIP

Clicking on this link will take you to the AHIP website, where you can take test exams to ensure AHIP compliance.



## PinPoint

Clicking on the PinPoint link will take you to the Cigna-HealthSpring's training website. From there, you can login and take the recommended courses, refresher courses, etc.



First time visitors  
[Click here to register](#)

Returning users  
Username:

Password:

[Log In](#)

[Forgot password?](#)  
[Forgot username?](#)

### Welcome to Cigna-HealthSpring's Online Certification Training!

Cigna-HealthSpring is excited to offer this comprehensive education tool. This is the first at Advantage plans. With this knowledge and your commitment to always sell with integrity, y

If you are experiencing issues with your training, please contact us at [Help Desk](#)



# My Profile

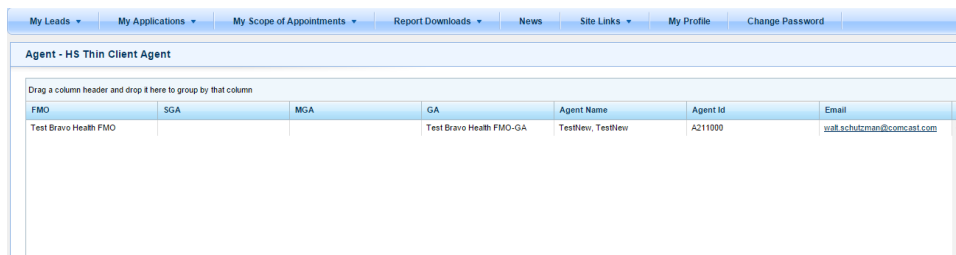
This section allows gives you access to your profile used for system administrative changes. You can make changes based on your level of access rights. Some Users may have no access to update / edit their profile information.

**Note:** *If something is inaccurate or out-of-date on your profile, please contact your Sales Manager and inform them of the necessary changes or updates.*



## View My Profile

To open your profile, click on the line to highlight and click **Open** (you can also double-click to perform the same function).



Agent - HS Thin Client Agent

Drag a column header and drop it here to group by that column

FMO	SGA	MGA	GA	Agent Name	Agent Id	Email
Test Bravo Health FMO			Test Bravo Health FMO-GA	TestNew, TestNew	A211000	<a href="mailto:walt.schitzman@cignaast.com">walt.schitzman@cignaast.com</a>

This will bring up the profile screen. If you have access rights, you can make any necessary changes and click on **Save and Close** to record those changes.

# Change Password

This section allows you to change your password at will, so long as it complies with the minimum security requirements.



Selecting Change Password will bring up this screen:



There are 4 steps for creating a new password:

1. Type your current password
2. Enter New Password
3. Confirm New Password
4. Click Save

**Note:** If you need to change your password, please use the **Change Password** option on the Menu Navigation bar. If you need additional assistance, Call HAAL at **1-866-442-7516**

## Password Rules

Passwords must:

- Be between 8 and 20 characters
- Contain at least one uppercase alphabet
- Contain at least one lowercase alphabet
- Contain at least one numeric character
- Contain no spaces

## Forget your password?

If you forget your password, please use the **Forgot Password** option on the main Login screen. If you need further assistance, call the HHealthSpring Agent Assistance Line to obtain a new password.

**HAAL: 1-866-442-7516**

# System Functions

## Sign Off

When you need to step away or no longer need access to the eAgent system, you can choose to sign off. This will force a user name and password to be entered again before allowing access to eAgent.

## Inactivity

eAgent has a built in security features that automatically logs users out after prolonged inactivity. After 5 minutes of inactivity, eAgent will give the user a warning prompt with options to Continue or Logout



If no selection is made within 25 seconds, eAgent automatically logs the user out and any unsaved information is lost.

## Save your work

Because of the inactivity feature, it is best to save your work frequently to prevent losing changes you have made to records, reports, or views.