
AGENT CONNECT TUTORIAL





CONTENTS

Book of Business	3
Expiring Policies	8
Medicare Applications	9
Policy Sales Over Time	10
Year to Date Policy Sales	13
Customer Sales	15
My Commission Statements.....	17
Commission Amount	20
Bonus Amount.....	22
Commissions and Members Count	24
Active and Expiring Insurance	26
Background Checks	27
Active and Expiring Licenses.....	28
Active and Expiring Appointments.....	29
Education	30
Producer Licenses	32
Quick Links.....	34
My Letters.....	35
Demographics.....	36
My Addresses	37
Banking/Tax Information	38
Tools & Resources	39
Producer Guide Download	42
Enrollment Portals.....	43
Producers Resource Access	44
Legal Disclaimers.....	46



To access your **Book of Business Details**:

-
- The screenshot shows the ConfSource dashboard with the following components:
- Header:** ConfSource logo and navigation links (Home, Reports, Settings, Users, Groups, Projects, Resources).
 - Left Sidebar:**
 - Book of Numbers:**
 - Active Members:** 157 (No Activity)
 - Scouting Parties:** 140 (None in 10 days)
 - Members Applications:** 0 (None)
 - Customer Sales:** 75, 112 (None, None)
 - Main Content Area:**
 - Policy Order Book View:** A line chart titled "Improving Productivity" showing a sharp increase in productivity starting around 2015.
 - Top 10 State Policy Sales:** A donut chart showing 187 sales in 10 days, with 100% completion.

The screenshot displays the SAP Customer Search interface for a Standard contract type. The search criteria are as follows:

- Customer Number: 1000000000
- Customer Name: SAP AG
- Party ID: 1000000000
- Organization Type: 1000000000
- Party Role: 1000000000

The results table shows three entries for SAP AG, all with a status of 'Discontinued'.

Customer Number	Customer Name	Party ID	Organization Type	Party Role	Status
1000000000	SAP AG	1000000000	1000000000	1000000000	Discontinued
1000000000	SAP AG	1000000000	1000000000	1000000000	Discontinued
1000000000	SAP AG	1000000000	1000000000	1000000000	Discontinued



To Export your **Book of Business**, click on the export icon in upper right.
This will allow you to export all active members to an Excel spreadsheet.

The screenshot shows the CapriSource web application interface. At the top, there is a search bar with fields for Subscriber Number, Subscriber Name, Policy ID, Termination Date, and Policy State. Below the search bar is a table of members. The table has columns for various fields including Policy ID, Subscriber Name, and Termination Date. An export icon (a small square with a right-pointing arrow) is highlighted in the top right corner of the table area.

Details will provide:

- Producer ID (NPN)
- Producer Name
- Subscriber (Member) ID
- Subscriber (Member) Name
- Members Date of Birth
- Policy State
- Members Zip Code
- Members Phone Number
- Product/Plan
- Policy ID
- Number of Dependents
- Effective Date
- Termination Date
- Policy Status

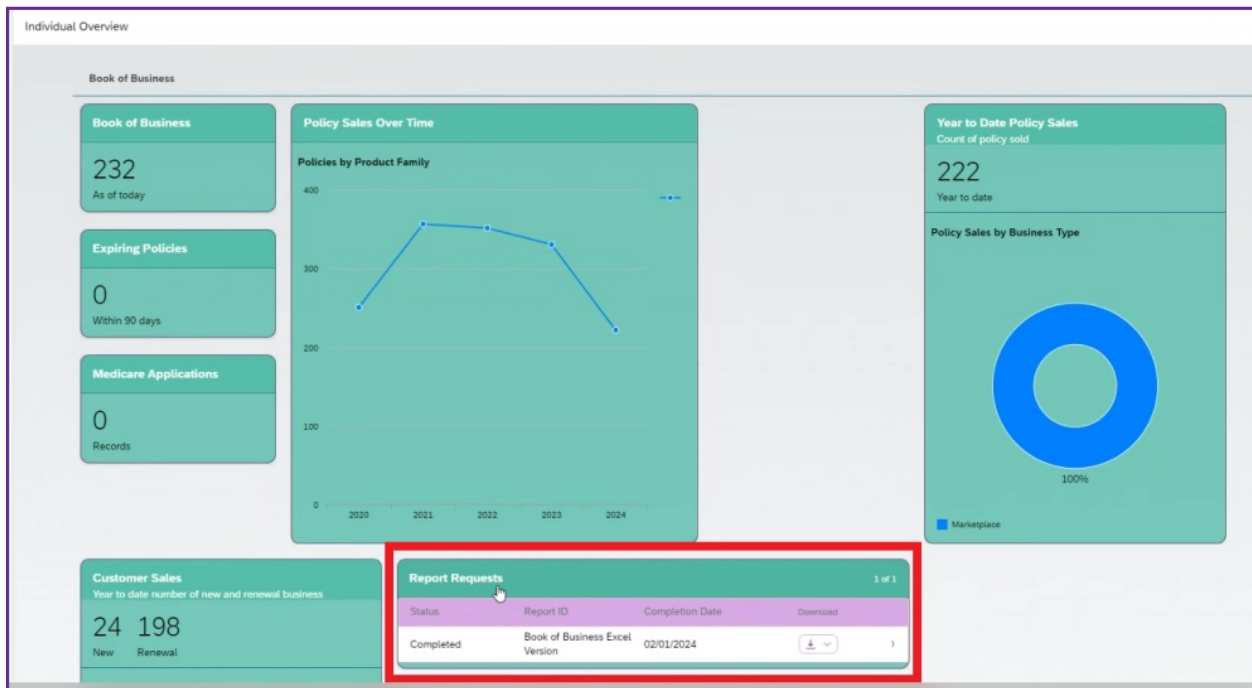
Clicking the arrow on far right of each **Members Line** will provide the following:

- Detail Dates: OED Date, Application Sign Date
- Product Information
- Member Demographics

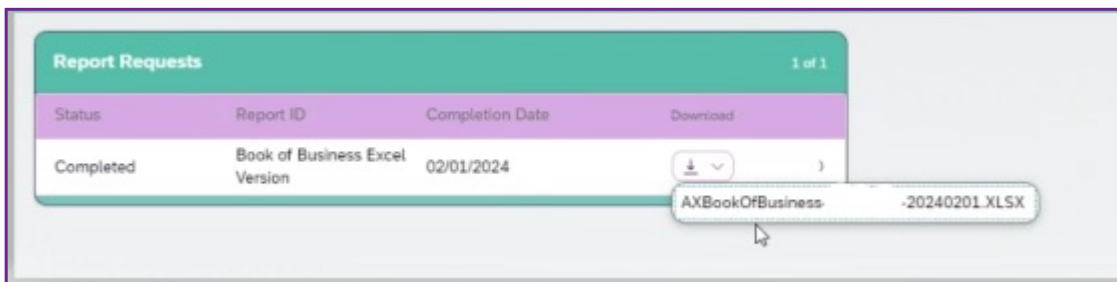


How to View/Download the entire **Book of Business** – including future effectuated members:

- In the **Book of Business** section, locate the **Report Requests** card:



- Click on the **Download** arrow, then the **AXBookofBusiness** link that appears on the screen.
- Click on the **AXBookofBusiness** link to create an Excel report:



- The Excel report will be sent to the downloads folder of your web browser.



How To Download a Member ID Card:

- Click into the **Book of Business** card:

Individual Overview

Book of Business Commission Compliance

Book of Business

Book of Business

232

As of today

- To Search for a member by name, go to the **Subscriber Name** box and click on the search box icon:

Standard

Subscriber Number: Subscriber Name:

[Search Icon]

- This screen will open.
 - Example shows searching for *Davis*:

Define Conditions: Subscriber Name

Subscriber Name

contains

david

Add

- Click OK
- Back to main page, click on OK again (far right):

Standard

Subscriber Number: Subscriber Name: Policy ID: Termination Date: Policy State:

[Search Icon] [OK] [Reset] [Apply Filters]

- All members containing the name *Davis* will populate:



Standard+ ~

Subscriber Number: [] Subscriber Name: [davis* x] Policy ID: [] Termination Date: [] Policy State: [] [OK] [Reset] [Adjust Filters (1)]

Customers (2)

Producer Id	Producer Name	Subscriber Number	Subscriber Name	Date of Birth	Policy State	ZIP	Phone	Email	Product	Policy ID	Number of Dependents	Effective Date	Termination Date
			Davis, M	05/23/1960	KENTUCKY (KY)				CareSource Marketplace Bronze First		2	01/01/2024	
Policy Status: Effectuated Aging Status: Current Premium Amount: 1,918.42 Tax Credit Amount: 991.00 Current Balance: 927.42 Current Balance Due Date: 03/06/2024 Paid Through Date: 02/29/2024 Last Paid Date: 01/25/2024 Auto-Pay: Y Link to Member Id Card: Member Id Card													
			Davis, S	06/01/1962	KENTUCKY (KY)	40299-5533			CareSource Marketplace Gold Dental, Vision, & Fitness		1	01/01/2024	
Policy Status: Effectuated Aging Status: Current Premium Amount: 1,324.89 Tax Credit Amount: 0.00													

- To Print the Member ID Card, click on the link:

Customers (2)

Producer Id	Producer Name	Subscriber Number	Subscriber Name	Date of Birth	Policy State	ZIP	Phone	Email	Product	Policy ID	Number of Dependents	Effective Date	Termination Date
			Davis, M	05/23/1960	KENTUCKY (KY)				CareSource Marketplace Bronze First		2	01/01/2024	
Policy Status: Effectuated Aging Status: Current Premium Amount: 1,918.42 Tax Credit Amount: 991.00 Current Balance: 927.42 Current Balance Due Date: 03/06/2024 Paid Through Date: 02/29/2024 Last Paid Date: 01/25/2024 Auto-Pay: Y Link to Member Id Card: Member Id Card													
					KENTUCKY				CareSource Marketplace				

- The card will then populate. Click on printable PDF:

CareSource

LOGGED IN AS:
Hannah Wilson
IN Marketplace Low Premium Silver 3
(94) D,V,& F

ID Card [] Logout [→]

Marketplace Low Premium Silver 3
Dental, Vision & Fitness

Member: [] Dependents: -01 IN 2023

Member ID: 1107 []-00

Health Plan: []

Payer ID: INCS1

Office: \$0 ER: \$300* Spec: \$15 UrgCare: \$25
*after \$600 Annual Deductible \$1,600 Out of Pocket Max

CareSource.com/marketplace
This card does not guarantee coverage. To verify benefits, view claims, or find a provider, visit the website or call Member Services.

Member Services: 1-833-230-2099
CareSource24* Nurse Advice Line: 1-800-743-3333 or 711
TTY Service for Hearing Impaired: 1-800-205-3945
Dental: 1-855-205-3945
Vision: 1-833-337-9129
Hearing: 1-866-202-2561
Fitness: 1-877-771-2746

Provider Services: 1-833-230-2101 | 855-1-800-431-7141
RPOB: 033038 | RPOC: A4 | RPOB: R00004
Medical Claims: P.O. Box 3607, Dayton, OH 45401-3607

Coverage provided through the Health Insurance Marketplace.

Printable PDF

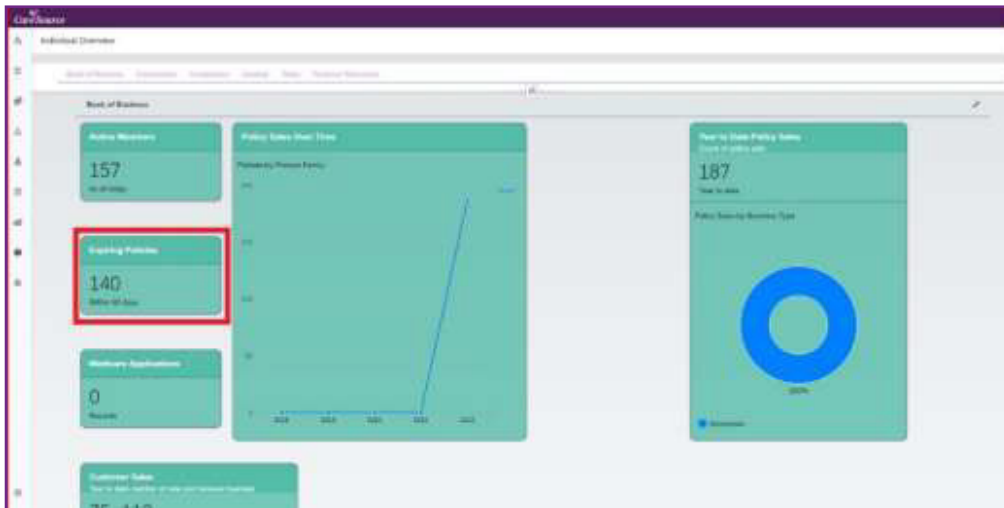


EXPIRING POLICIES

The Expiring Policies Card will list the total number of members with expiring policies within the next 90 days.

To Access your Expiring Policies Details:

- Click on the **Expiring Policies Details Card**. The example below shows 140 Expiring Policies



By clicking on the **Expiring Policies Card**, the system will allow you to view each member's detail. Example below shows the member detail.

The screenshot shows a table of expiring policies. The table has columns for Policy ID, Policy Name, Submitter Name, Policy ID, Termination Date, Policy Type, and Status. Three policies are listed, all with a termination date of 12/31/2022.

Policy ID	Policy Name	Submitter Name	Policy ID	Termination Date	Policy Type	Status
00281943	CardSource	Northwestern Life	00281943	12/31/2022	Effectuated	
00281944	CardSource	Northwestern Life	00281944	12/31/2022	Effectuated	
00281945	CardSource	Northwestern Life	00281945	12/31/2022	Effectuated	

In the above example, you can see policies expiring within 90 days of today's date (Dec 20, 2022). The three policies shown are expected to expire on 12/31/2022.

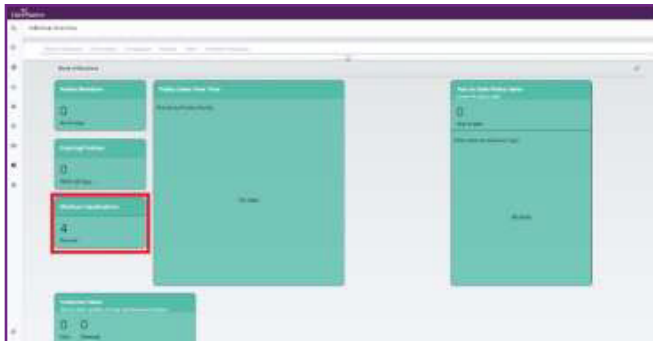


MEDICARE APPLICATIONS

The Medicare Applications Card will list the total number of current Medicare Applications.

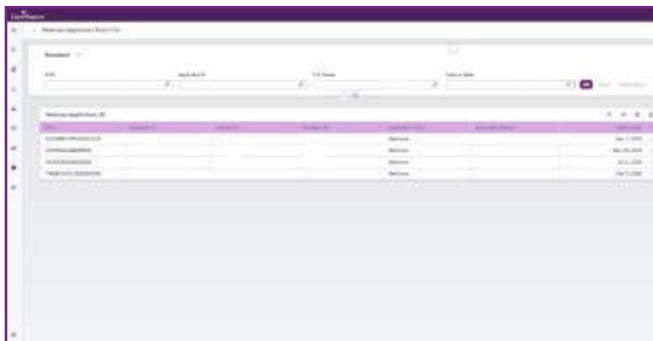
To access your Medicare Applications Details:

- Click on the **Medicare Applications**. The example below shows 4 Medicare Applications.



By clicking on the **Medicare Applications Card**, the system will allow you to view each member's detail.

Example below shows the Medicare member detail.



To view the details of any specific applicant, click anywhere within the desired applicant line.

Example below shows details after clicking on the first applicant.

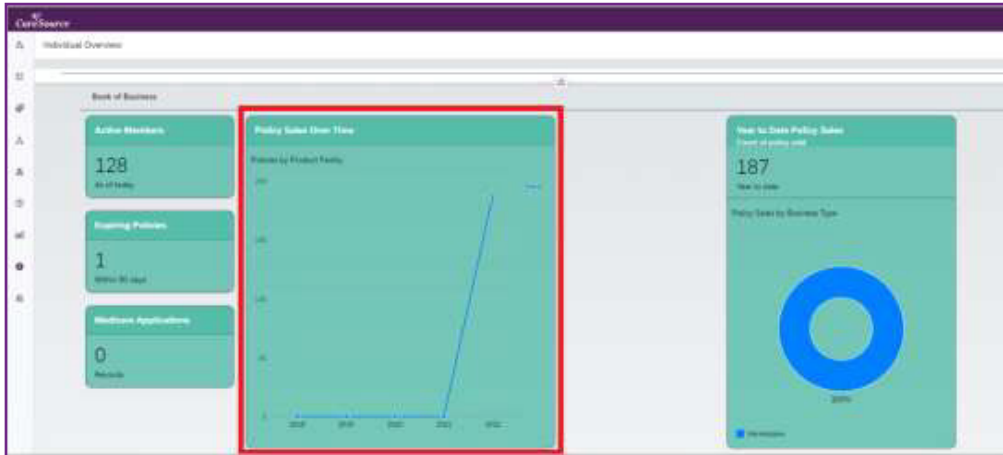




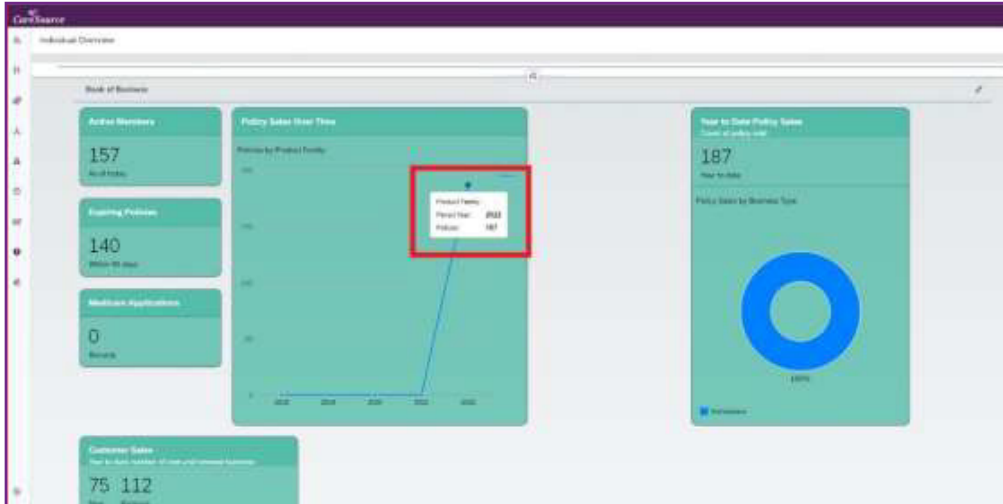
POLICY SALES OVER TIME

The Policy Sales Over Time Card provides policy sales per year.

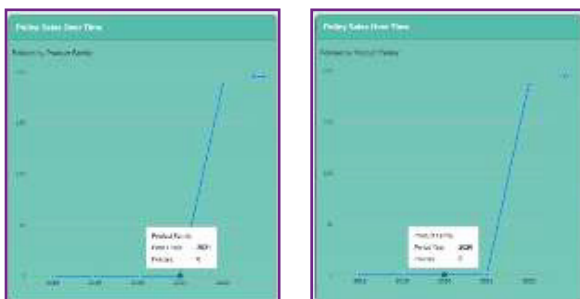
To access your Policy Sales Over Time, click on the card.



By hovering over the Policy Sales Over Time Card, the system will allow you to view number of policies for each calendar year.



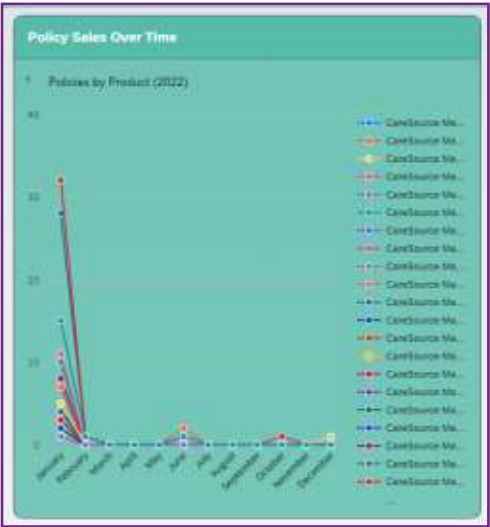
Examples below shows the policies for the calendar years 2021 and 2020.





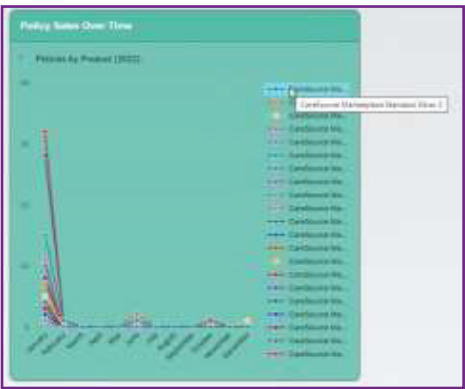
Click on the specific year to provide further details for that year.

The example below shows plan details for 2022.



By hovering over each entity on far right of card, the system will display the **Marketplace Plan**.

Example below shows CareSource Marketplace Standard Silver 2.



By clicking on the **Policy Sales Over Time Card**, the system will allow you to view each member's plan detail.

Example below shows the member plan detail.

The screenshot shows the "CareSource" member plan detail page. It includes a search bar at the top and a table of plan details. The table has columns for "Plan Name", "Plan Type", "Plan Status", "Plan Start Date", "Plan End Date", "Plan Cost", "Plan Coverage", and "Plan Description". The first row shows a plan named "CareSource Marketplace Standard Silver 2" with a status of "Active" and a start date of "01/01/2022".

Plan Name	Plan Type	Plan Status	Plan Start Date	Plan End Date	Plan Cost	Plan Coverage	Plan Description
CareSource Marketplace Standard Silver 2	Marketplace	Active	01/01/2022	12/31/2022	\$1000.00	Medical, Prescription, Dental, Vision, Hearing, and Wellness	Marketplace Standard Silver 2



To filter and view specific plans, you may filter by product.

The example below shows filtering for CareSource Marketplace Bronze and Bronze DVF.

The screenshot shows the CareSource Customer Sales Search interface. The 'Product' dropdown menu is open, displaying a list of plans. The 'Standard' (default) filter is selected. The search results table shows two rows of data, each with a 'Product' column that is highlighted in blue. The first row is for 'CareSource Marketplace Bronze' and the second row is for 'CareSource Marketplace Bronze DVF, Vision, & Fitness'. The table also includes columns for 'Subscriber Number', 'Subscriber Name', 'Date of Birth', 'Policy ID', 'Policy Status', 'Policy Type', 'Number of Dependents', 'Effective Date', 'Termination Date', and 'Policy Status'.

Subscriber Number	Subscriber Name	Date of Birth	Policy ID	Policy Status	Policy Type	Number of Dependents	Effective Date	Termination Date	Policy Status
07231969	INDIAN	07/23/1969	INDIAN	48032	CareSource Marketplace Bronze	1	01/01/2022	12/31/2022	Effectuated
09231065	INDIAN	09/23/1065	INDIAN	48032	CareSource Marketplace Bronze DVF, Vision, & Fitness	1	01/01/2022	12/31/2022	Effectuated

The example below shows the results of filtering for CareSource Marketplace Bronze and Bronze DVF.

The screenshot shows the CareSource Customer Sales Search interface with the 'Product' dropdown menu set to 'CareSource Marketplace Bronze and Bronze DVF'. The search results table displays three rows of data, each with a 'Product' column that is highlighted in blue. The table also includes columns for 'Subscriber Number', 'Subscriber Name', 'Date of Birth', 'Policy ID', 'Policy Status', 'Policy Type', 'Number of Dependents', 'Effective Date', 'Termination Date', and 'Policy Status'.

Subscriber Number	Subscriber Name	Date of Birth	Policy ID	Policy Status	Policy Type	Number of Dependents	Effective Date	Termination Date	Policy Status
03021976	INDIAN (IN)	03/02/1976	INDIAN (IN)	48032	CareSource Marketplace Bronze DVF, Vision, & Fitness	1	01/01/2022	12/31/2022	Effectuated
04061903	OHIO (OH)	04/06/1903	OHIO (OH)	48305	CareSource Marketplace Bronze DVF, Vision, & Fitness	1	01/01/2022	12/31/2022	Effectuated
07181963	INDIAN (IN)	07/18/1963	INDIAN (IN)	48205	CareSource Marketplace Bronze	1	01/01/2022	12/31/2022	Effectuated

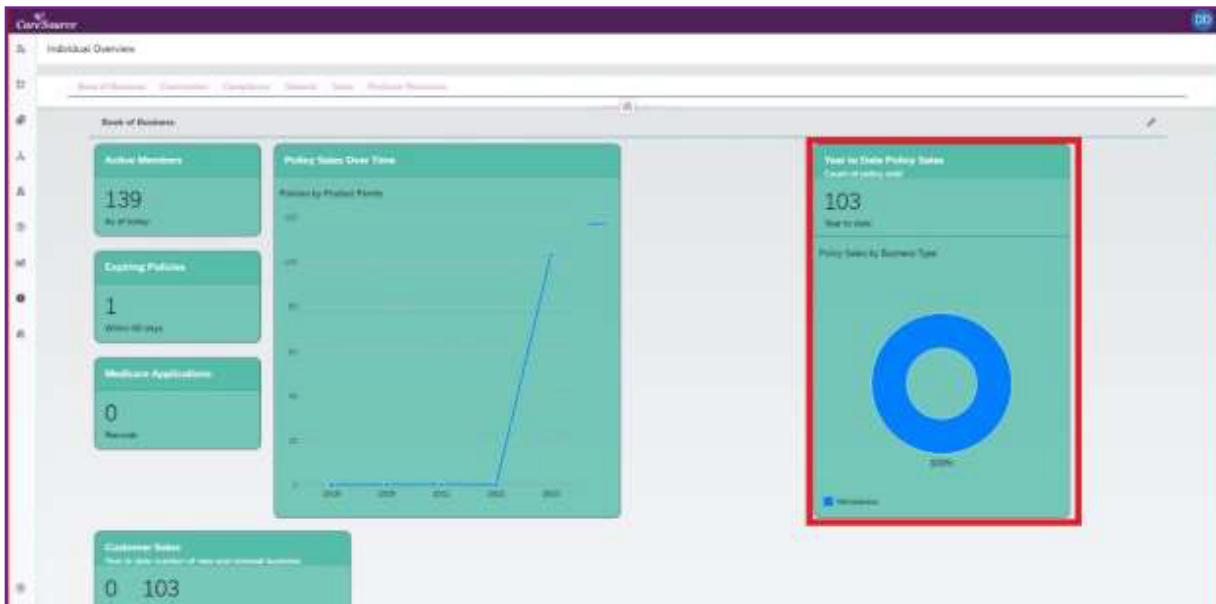


YEAR TO DATE POLICY SALES

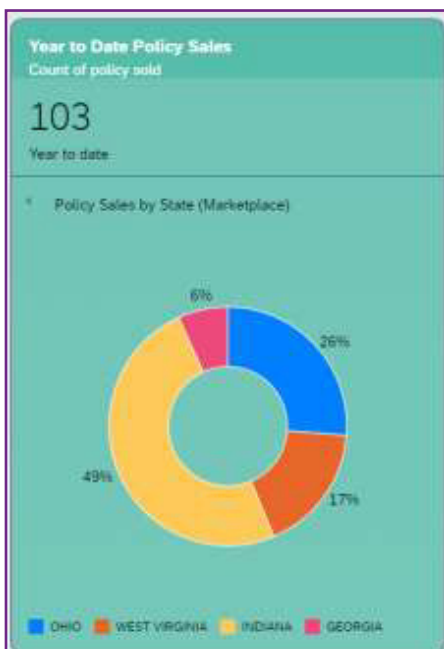
The Year to Date Policy Sales card will list your policy count for the current year.

To access your Year to Date Policy Sales:

- Click on the Year to Date Policy Sales. The example below shows 103 policies sold.



By clicking on either the blue pie chart, or the word “Marketplace”, you can see the Year to Date Policy Sales by state:





By clicking on the **Year to Date Policy Sales Card**, the system will allow you to view each member's detail.

Example below shows the member detail.

The screenshot shows the 'Customer Sales Search' interface. At the top, there are search filters: Subscriber Number, Subscriber Name, Policy ID, Product, Period Month, Period Year (set to 2023), Policy State, and Policy Type. Below the filters is a table titled 'Customer Sales (00)' with columns: Product ID, Product Name, Subscriber Number, Subscriber Name, Start of Bill, Policy Year, ZIP, Plans, Product, Policy ID, Number of Dependents, Effective Date, Termination Date, and Policy Status. Two rows of results are visible, each with a detailed view on the left showing 'Aging Status: Current', 'Premium Amount', 'Tax Credit Amount', 'Current Balance', 'Paid Through Date', and 'Last Paid Date'.

By using the provided dropdowns along the top of the screen, you may filter by Product, Period Month, Period Year, Policy State and Policy Type.

The example below shows the filter option for Products.

This screenshot shows the same 'Customer Sales Search' interface, but with the 'Product' dropdown menu open. The dropdown lists various product options, including 'CareSource Marketplace', 'CareSource Marketplace Bronze', 'CareSource Marketplace Bronze Dental, Vision, & Fitness', 'CareSource Marketplace Bronze First', 'CareSource Marketplace Bronze First Dental, Vision, & Fitness', 'CareSource Marketplace Bronze First Limited', 'CareSource Marketplace Bronze First Limited Dental, Vision, & Fitness', 'CareSource Marketplace Bronze First Zero', 'CareSource Marketplace Bronze First Zero Dental, Vision, & Fitness', 'CareSource Marketplace Bronze H Zero', 'CareSource Marketplace Bronze Limited', 'CareSource Marketplace Bronze Limited Dental, Vision, & Fitness', 'CareSource Marketplace Bronze Zero', 'CareSource Marketplace Bronze Zero Dental, Vision, & Fitness', 'CareSource Marketplace Catastrophic', 'CareSource Marketplace Gold', 'CareSource Marketplace Gold Dental, Vision, & Fitness', 'CareSource Marketplace Gold Limited', 'CareSource Marketplace HSA Eligible Bronze', and 'CareSource Marketplace Low Deductible Silver'. The background table shows the same data as the previous screenshot.



CUSTOMER SALES

The Customer Sales Card will list the number of New and Renewal business by month.

To access your **Customer Sales Detail**:

- Click on the **Customer Sales Card**. The example below shows 75 New and 112 Renewal. This will show all New and Renewal business detail for the calendar year.



By clicking on any of the highlighted areas you can filter your search results.

In the example below, we are searching for New only.





When clicking on **New**, the details are provided for all New Sales.

Customer Sales Search

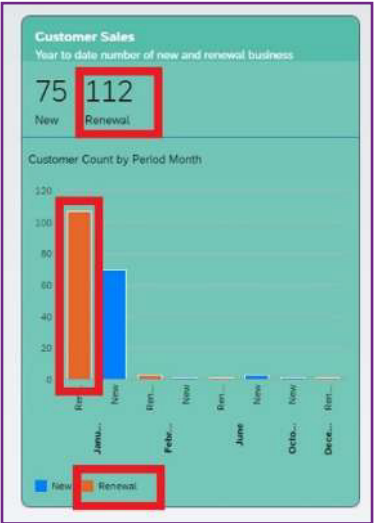
Standard: Standard

Subscriber Number: Subscriber Name: Policy ID: Product: Product Description: Product Code: Policy Status: Status Type: **New**

Customer Sales (2)

Customer ID	Subscriber Name	Subscriber Address	Subscriber Email	Policy ID	Product	Product Description	Product Code	Policy Status	Policy Type	Policy Date	Policy End Date	Policy Status
100000001	John Doe	123 Main St	john.doe@abc.com	100000001	Life Insurance	Life Insurance	100000001	Active	New	1/1/2020	12/31/2020	Active
100000002	Jane Smith	456 Main St	jane.smith@abc.com	100000002	Life Insurance	Life Insurance	100000002	Active	New	1/1/2020	12/31/2020	Active
100000003	John Doe	123 Main St	john.doe@abc.com	100000003	Life Insurance	Life Insurance	100000003	Active	New	1/1/2020	12/31/2020	Active

In the example below, we are searching for Renewal only.



When clicking on **Renewal**, the details are provided for all Renewal Sales.

Customer Sales Search

Standard: Standard

Subscriber Number: Subscriber Name: Policy ID: Product: Product Description: Product Code: Policy Status: Status Type: **Renewal**

Customer Sales (2)

Customer ID	Subscriber Name	Subscriber Address	Subscriber Email	Policy ID	Product	Product Description	Product Code	Policy Status	Policy Type	Policy Date	Policy End Date	Policy Status
100000001	John Doe	123 Main St	john.doe@abc.com	100000001	Life Insurance	Life Insurance	100000001	Active	Renewal	1/1/2020	12/31/2020	Active
100000002	Jane Smith	456 Main St	jane.smith@abc.com	100000002	Life Insurance	Life Insurance	100000002	Active	Renewal	1/1/2020	12/31/2020	Active
100000003	John Doe	123 Main St	john.doe@abc.com	100000003	Life Insurance	Life Insurance	100000003	Active	Renewal	1/1/2020	12/31/2020	Active

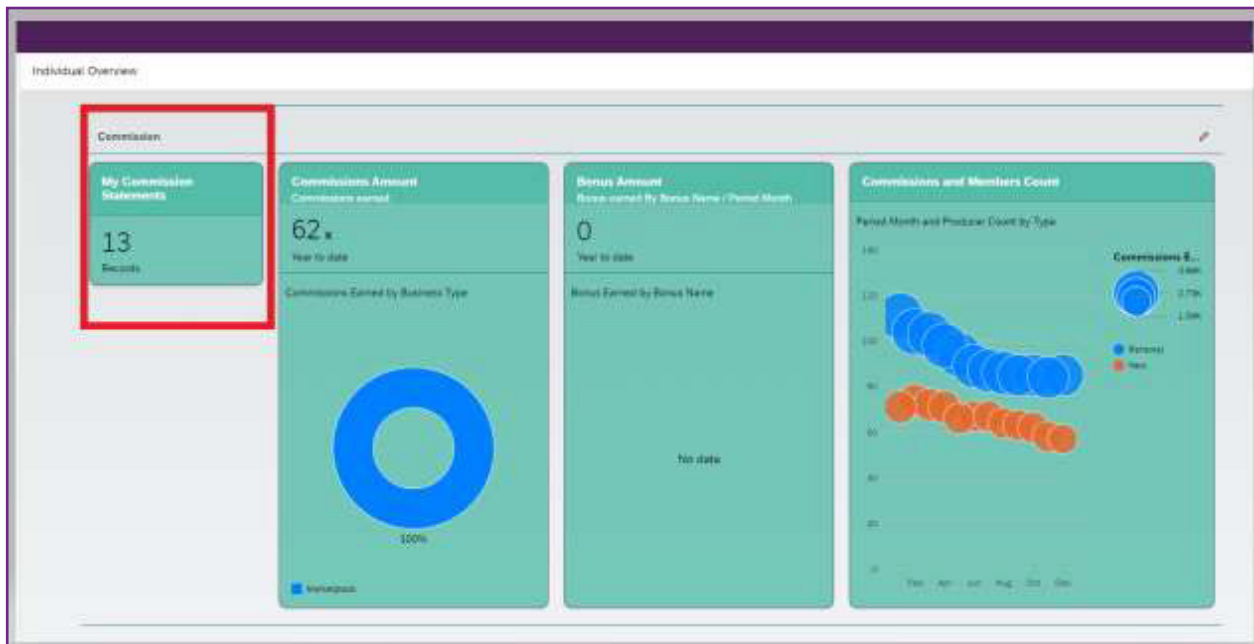


MY COMMISSION STATEMENTS

The Commission Statements Card will list the number of statements available to view.

To access your Commission Statements Details:

- Click on the **My Commission Statements Card**. The example below shows 13 records.



By clicking on the **My Commission Statements Card**, the system will allow you to view each commission statement.

Example below shows the commission statements by month.

The screenshot shows the 'Commission Statement Search' interface. It includes search filters for 'Payee Entity ID', 'Payee Name', 'Payee Type', 'Process Year' (set to 2022), 'Process Month', and 'Date Generated'. Below the filters, a table titled 'Commission Statements (28)' displays the following data:

Payee Entity ID	Payee Name	Payee Type	Process Year	Process Month	Date Generated	Amount	Count
		External Payroll	2022	January	Jan 15, 2022	1	1
		External Payroll	2022	February	Feb 15, 2022	1	1
		External Payroll	2022	March	Mar 7, 2022	1	1
		External Payroll	2022	April	Apr 12, 2022	1	1
		External Payroll	2022	May	May 12, 2022	1	1
		External Payroll	2022	June	Jun 14, 2022	1	1
		External Payroll	2022	July	Jul 8, 2022	1	1
		External Payroll	2022	August	Aug 12, 2022	1	1
		External Payroll	2022	September	Sep 15, 2022	1	1
		External Payroll	2022	October	Oct 20, 2022	1	1
		External Payroll	2022	November	Nov 14, 2022	1	1
		External Payroll	2022	December	Dec 9, 2022	1	1
		External Payroll	2022	December	Dec 15, 2022	1	1



You may filter for a specific year by selecting the **Process Year** from the dropdown.

Standard

Payee Entity ID: Payee Name: Payout Type: Process Year:

2024
2023
2022
2021

Commission Statements (13)

Payee Entity ID	Payee Name	Payout Type	Process Year
			2021

To **Export a Commission Statement**, click on the down arrow under attachments column.

This will allow you to export a specific month's statement.

Process Month	Date Generated	Attachments	
January	Jan 10, 2022		
February	Feb 11, 2022		
March	Mar 7, 2022		
April	Apr 11, 2022		
May	May 10, 2022		
June	Jun 14, 2022		
July	Jul 8, 2022		
August	Aug 11, 2022		
September	Sep 10, 2022		
October	Oct 10, 2022		
November	Nov 14, 2022		
December	Dec 9, 2022		
December	Dec 14, 2022		

By clicking anywhere on a specific line/month, the system will open that statements detail.

Commission Statement Detail

Commission Statement - January - 2022

Date Generated: Jan 10, 2022

Statement Number: 1041341400170000

File Type: PDF

Attachments

Attachments

No data found. Try adjusting the filter settings.

Statement Commissions

Statement Commissions (134)

Employee ID	Commission Type	Amount	Date Generated	Commission Amount				
04	Commission Marketable Stock Deriv Vested & Payout	Dec 25, 2021 7:00:00 PM	Dec 30, 2022 7:00:00 PM	11/2022 11/2022	Yes	1	25.00	25.00
04	Commission Marketable Stock Deriv	Dec 31, 2021 7:00:00 PM	Dec 31, 2022 7:00:00 PM	11/2022 11/2022	Yes	1	25.00	25.00
04	Commission Marketable Stock Deriv	Dec 31, 2021 7:00:00 PM	Dec 30, 2022 7:00:00 PM	11/2022 11/2022	Yes	1	25.00	25.00
04	Commission Marketable Stock Deriv	Dec 31, 2021 7:00:00 PM	Mar 30, 2022 8:00:00 PM	11/2022 11/2022	Yes	1	25.00	25.00
04	Commission Marketable Stock Deriv	Dec 31, 2020 7:00:00 PM	Dec 30, 2021 7:00:00 PM	11/2022 11/2022	Yes	1	25.00	25.00



To Export the **Commission Statement** to an Excel file:

- Click on grey area to the right of **STATEMENT COMMISSIONS (239)**: Red Box in example.

Commission Statement - May - 2023

Statement Number: 16430000

Detail Information

System Status: Active Process Year: 2023

Date Generated: May 9, 2023 Statement Number: 16836871296430000

Attachments

Attachments

Date Generated	Attachment File Type	Record Type	Process Year	Email Attachment	Voucher Number
No data found. Try adjusting the filter settings.					

Statement Commissions

Statement Commissions (239)

ProducerID	ProducerName	MemberID	MemberName	StateCd	ProductDescription	EffectiveDate	TermDate	AppSignedDate	PremPeriod	BillPeriod	NewRenew
			IN		CareSource Marketplace Bronze First	Dec 31, 2022, 7:00:00 PM	May 30, 2023, 8:00:00 PM		05/2023	05/2023	New
			IN		CareSource Marketplace Low Premium Silver 2, Dental, Vision, & Fitness	Dec 31, 2022, 7:00:00 PM			05/2023	05/2023	New

- That entire statement will open.
- Click on the CVS icon (FAR RIGHT OF SCREEN):

OK **Reset** **Adapt Filters**

BillPeriod **NewRenewal** **CycleYear** **Retro**

05/2023 New

- Screen will pop up - Click on **EXPORT** (bottom):

Export As

File Name: *

Statement Commissions

Select Format:

Comma Delimited (.csv)

☒ Include displayed columns only

☐ Include all columns

☒ Include header row

☐ Include filter settings

Export **Cancel**

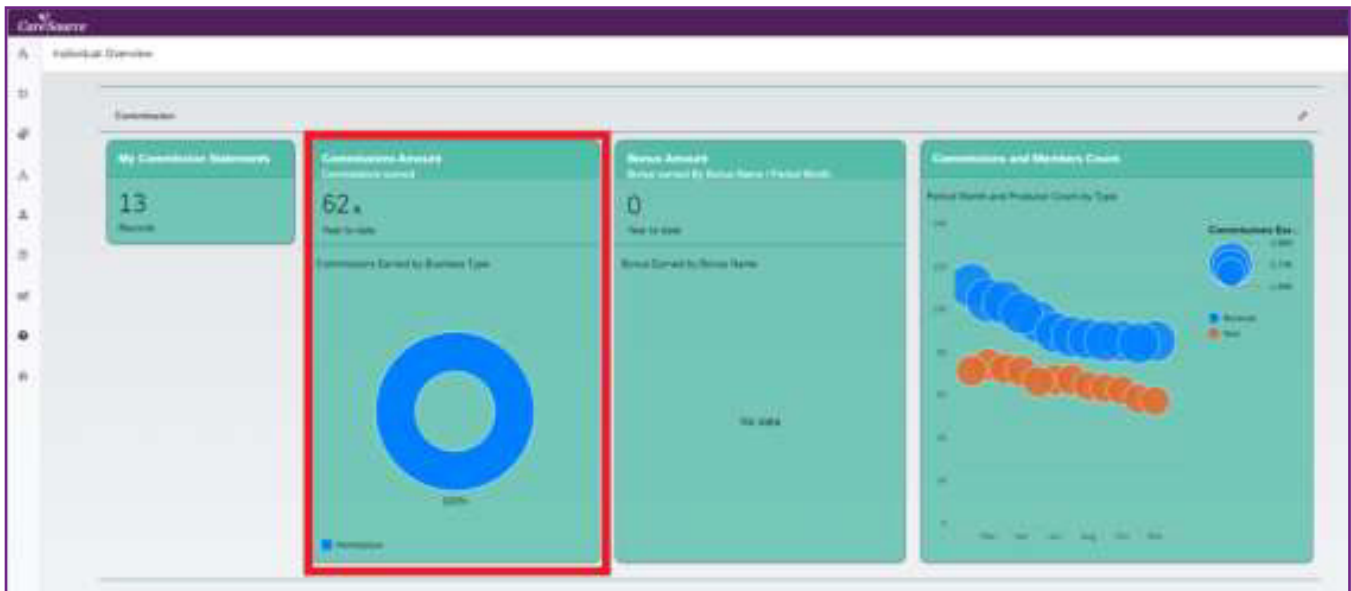


COMMISSION AMOUNT

The Commission Amount Card will list the total of current Commissions earned.

To access your Commission Amount Details:

- Click on the **Commission Amount Card**. The example below shows 62k year to date.



By hovering over the graph, you can see the **Business Type** and the total commission amount.





By clicking on the **Commission Amount Card**, the system will allow you to view commission detail.
Example below shows the commission detail.

Standard (00/00/00)

Policy ID: [Example] Member ID: [] Member Name: [] Period Year: 2022 Period Month: [] Policy Issue State: [] Product: [] SubType: []

Policy Type: [] Member Number: [] Product: []

OK Cancel Refresh Filter

Product Commissions (198)

Policy ID	Member ID	Member Name	Period Year	Period Month	Policy Issue State	Product	SubType	Policy Type	Member Number	Product	Commission Amount
10001100	12345		2022	January	OHIO (OH)	CareSource Marketplace Low Premium Silver 2	Marketplace	Renewal	10410412	Yes	20.00
10000402	23456		2022	January	INDIANA (IN)	CareSource Marketplace Bronze First Dental, Vision, & Fitness	Marketplace	Renewal	10410412	Yes	21.00
10102000	34567		2022	January	INDIANA (IN)	CareSource Marketplace Bronze First Dental, Vision, & Fitness	Marketplace	Renewal	10410412	Yes	21.00
10000402	45678		2022	January	OHIO (OH)	CareSource Marketplace Bronze First	Marketplace	Renewal	10410412	Yes	20.00
10100007	56789		2022	January	OHIO (OH)	CareSource Marketplace Low Premium Silver Dental, Vision, & Fitness	Marketplace	Renewal	10410412	Yes	43.00
10401572	67890		2022	January	INDIANA (IN)	CareSource Marketplace Bronze First Dental, Vision, & Fitness	Marketplace	Renewal	10410412	Yes	21.00

The example below shows the filtering option for Period Month April.

Standard (00/00/00)

Policy ID: [Example] Member ID: [] Member Name: [] Period Year: 2022 Period Month: April Policy Issue State: [] Product: [] SubType: []

Policy Type: [] Member Number: [] Product: []

OK Cancel Refresh Filter

Product Commissions (176)

Policy ID	Member ID	Member Name	Period Year	Period Month	Policy Issue State	Product	SubType	Policy Type	Member Number	Product	Commission Amount
10001100			2022	April	OHIO (OH)	CareSource Marketplace Low Premium Silver 2	Marketplace	Renewal		Yes	20.00
10000402			2022	April	INDIANA (IN)	CareSource Marketplace Bronze First Dental, Vision, & Fitness	Marketplace	Renewal		Yes	21.00
10100100			2022	April	GEORGIA (GA)	CareSource Marketplace Low Premium Silver Dental, Vision, & Fitness	Marketplace	Renewal		Yes	0.00
10100007			2022	April	OHIO (OH)	CareSource Marketplace Low Premium Silver Dental, Vision, & Fitness	Marketplace	Renewal		Yes	43.00
10401572			2022	April	INDIANA (IN)	CareSource Marketplace Bronze First Dental, Vision, & Fitness	Marketplace	Renewal		Yes	21.00

PHI has been removed.

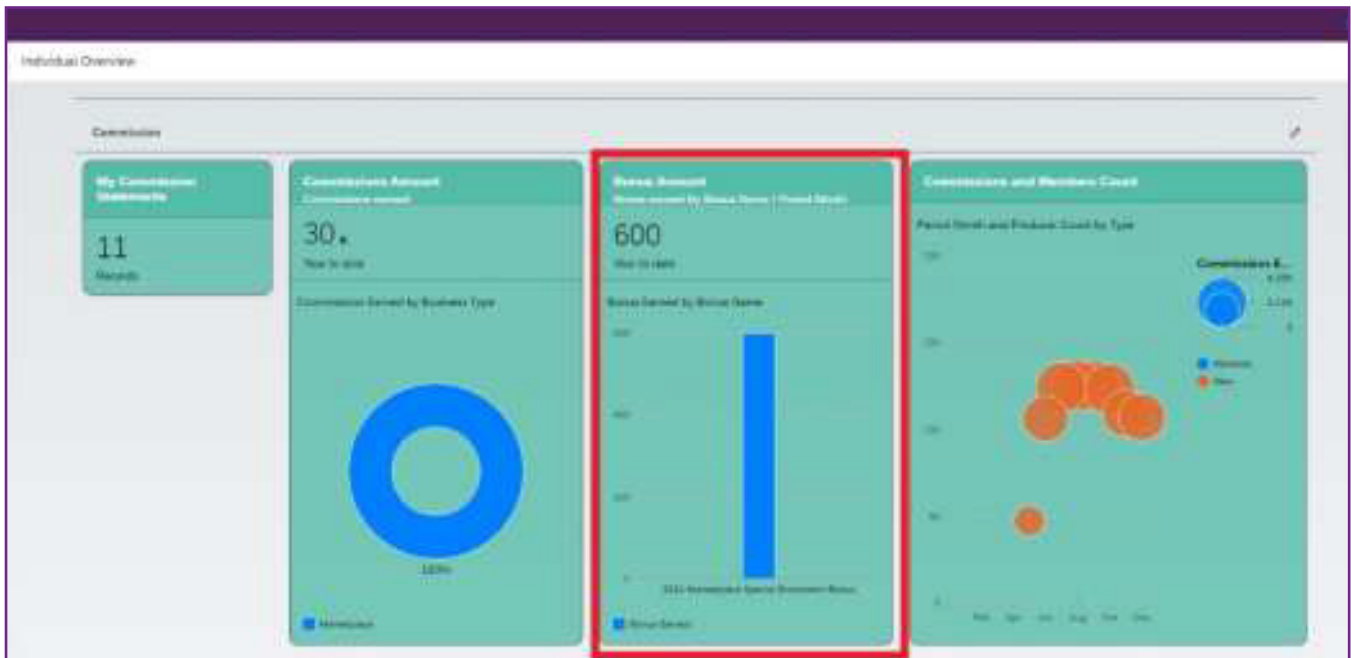


BONUS AMOUNT

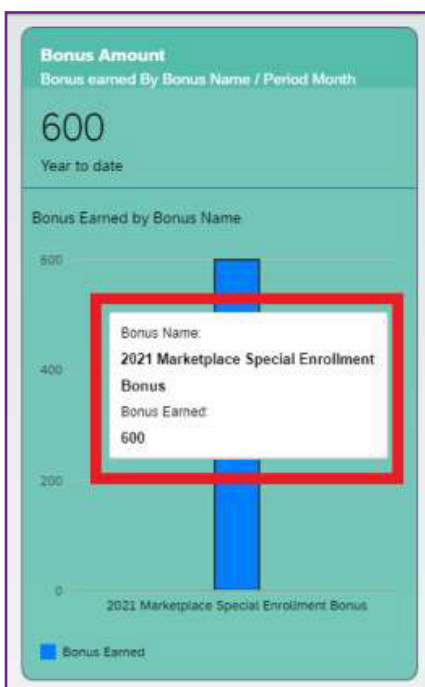
The Bonus Amount Card will provide Bonus earned by Bonus Name and Period Month.

To access your Bonus Amount Details:

- Click on the Bonus Amount Card. The example below shows 600.



By hovering over the graph, the system will provide the current Bonus name and Bonus Earned.





By clicking on the **Bonus Amount Card**, the system will allow you to view each Bonus.

Example below shows the Bonus History.

Bonus Name	Period Year	Period Month	Commission Amount	System Status	Date Generated	Finalized
2021 Marketplace Special Enrollment Bonus	2021	December	100.00	Posted	Dec 13, 2021	Yes
2021 Marketplace Special Enrollment Bonus	2021	September	-100.00	Posted	Nov 10, 2021	Yes
2021 Marketplace Special Enrollment Bonus	2021	August	100.00	Posted	Oct 13, 2021	Yes
2021 Marketplace Special Enrollment Bonus	2021	August	100.00	Posted	Oct 13, 2021	Yes
2021 Marketplace Special Enrollment Bonus	2021	August	100.00	Posted	Oct 13, 2021	Yes
2021 Marketplace Special Enrollment Bonus	2021	September	100.00	Posted	Oct 13, 2021	Yes
2021 Marketplace Special Enrollment Bonus	2021	October	200.00	Posted	Oct 13, 2021	Yes

To export a specific month, click on the export icon on upper right of screen.

Bonus Name	Period Year	Period Month	Commission Amount	System Status	Date Generated	Finalized
2021 Marketplace Special Enrollment Bonus	2021	December	100.00	Posted	Dec 13, 2021	Yes
2021 Marketplace Special Enrollment Bonus	2021	September	-100.00	Posted	Nov 10, 2021	Yes
2021 Marketplace Special Enrollment Bonus	2021	August	100.00	Posted	Oct 13, 2021	Yes
2021 Marketplace Special Enrollment Bonus	2021	August	100.00	Posted	Oct 13, 2021	Yes
2021 Marketplace Special Enrollment Bonus	2021	August	100.00	Posted	Oct 13, 2021	Yes
2021 Marketplace Special Enrollment Bonus	2021	September	100.00	Posted	Oct 13, 2021	Yes
2021 Marketplace Special Enrollment Bonus	2021	October	200.00	Posted	Oct 13, 2021	Yes

A CVS file will be generated.

	A	B	C	D	E	F	G
1	Bonus Name	Period Year	Period Month	Commission Amount	System Status	Date Generated	Finalized
2	2021 Marketplace	2021	December	100	Posted	Dec 13 2021	Yes
3	2021 Marketplace	2021	September	-100	Posted	Nov 10 2021	Yes
4	2021 Marketplace	2021	August	100	Posted	Oct 13 2021	Yes
5	2021 Marketplace	2021	August	100	Posted	Oct 13 2021	Yes
6	2021 Marketplace	2021	August	100	Posted	Oct 13 2021	Yes
7	2021 Marketplace	2021	September	100	Posted	Oct 13 2021	Yes
8	2021 Marketplace	2021	October	200	Posted	Oct 13 2021	Yes
9							

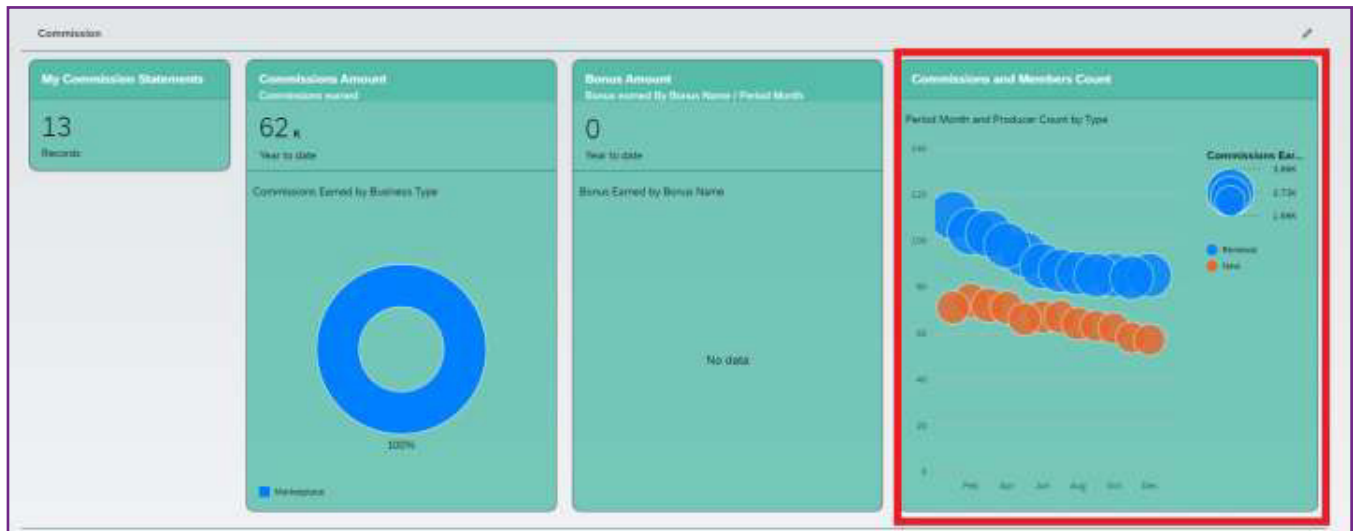


COMMISSIONS AND MEMBERS COUNT

The Commissions and Members Count Card will list the Commissions and Members Count per month by plan type.

To access your Commissions and Members Count Details:

- Click on the Commissions and Members Count Card.

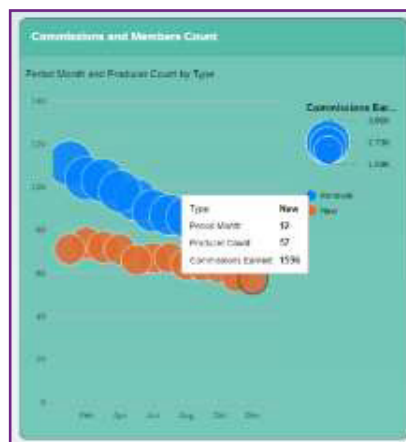
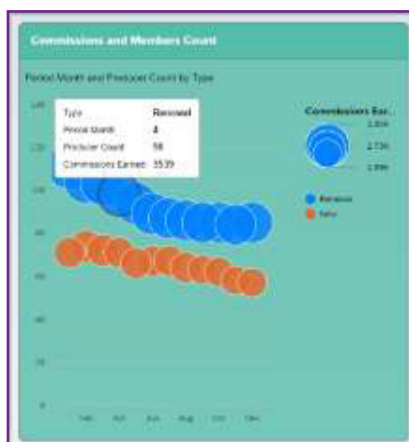


By hovering over the card, you can view specific month information at a glance.

Blue = Renewal

Orange = New

The examples below show a Renewal Member Count for April and a New Member count for December.





By clicking on the **Commissions and Members Count Card**, the system will allow you to view Commissions and Member Count detail.

Example below shows the Commissions and Member Count detail. It has been filtered for OHIO only.

- If no specific month is selected in the dropdown box, it will include every month starting at January.

Standard (3/3/2022)

Policy ID: [empty] Member ID: [empty] Member Name: [empty] Period Year: 2022 Period Month: [empty] Policy Issue State: OHIO (OH) Product: [empty] SubType: [empty]

Policy Type: [empty] Voucher Number: [empty] Finalized: [empty]

OK Cancel Refresh (2)

Product Commissions (100)

Policy ID	Member ID	Member Name	Period Year	Period Month	Policy Issue State	Product	SubType	Policy Type	Voucher Number	Finalized	Commission Amount
			2022	January	OHIO (OH)	CareSource Marketplace Low Premium Silver 1	Marketplace	Renewal		Yes	20.00
			2022	January	OHIO (OH)	CareSource Marketplace Bronze Gold	Marketplace	Renewal		Yes	20.00
			2022	January	OHIO (OH)	CareSource Marketplace Low Premium Silver 2	Marketplace	Renewal		Yes	61.00
			2022	January	OHIO (OH)	CareSource Marketplace Low Premium Silver 2	Marketplace	Renewal		Yes	20.00
			2022	January	OHIO (OH)	CareSource Marketplace Low Premium Silver	Marketplace	Renewal		Yes	20.00
			2022	January	OHIO (OH)	CareSource Marketplace Low Deductible Silver 1	Marketplace	Renewal		Yes	21.00

By selecting the **Product** from the dropdown, you can view every member for one specific product.

The example below shows CareSource Marketplace Gold in Ohio for 2022. Each member is listed for each month.

Standard (3/3/2022)

Policy ID: [empty] Member ID: [empty] Member Name: [empty] Period Year: 2022 Period Month: [empty] Policy Issue State: OHIO (OH) Product: CareSource M... SubType: [empty]

Policy Type: [empty] Voucher Number: [empty] Finalized: [empty]

OK Cancel Refresh (2)

Product Commissions (32)

Policy ID	Member ID	Member Name	Period Year	Period Month	Policy Issue State	Product	SubType	Policy Type	Voucher Number	Finalized	Commission Amount
			2022	January	OHIO (OH)	CareSource Marketplace Gold	Marketplace	Renewal	1841642290001004	Yes	40.00
			2022	February	OHIO (OH)	CareSource Marketplace Gold	Marketplace	Renewal	1844613862290000	Yes	40.00
			2022	March	OHIO (OH)	CareSource Marketplace Gold	Marketplace	Renewal	1846882552579000	Yes	40.00
			2022	April	OHIO (OH)	CareSource Marketplace Gold	Marketplace	Renewal	1849705474920000	Yes	40.00
			2022	May	OHIO (OH)	CareSource Marketplace Gold	Marketplace	Renewal	1852310893842000	Yes	40.00
			2022	June	OHIO (OH)	CareSource Marketplace Gold	Marketplace	Renewal	185544491034000	Yes	40.00
			2022	July	OHIO (OH)	CareSource Marketplace Gold	Marketplace	Renewal	185732706980000	Yes	40.00
			2022	August	OHIO (OH)	CareSource Marketplace Gold	Marketplace	Renewal	1860262006841000	Yes	40.00
			2022	September	OHIO (OH)	CareSource Marketplace Gold	Marketplace	Renewal	186286030282000	Yes	40.00
			2022	October	OHIO (OH)	CareSource Marketplace Gold	Marketplace	Renewal	1865458887288000	Yes	40.00

PHI and HIPAA has been removed.



ACTIVE AND EXPIRING INSURANCE

The Active and Expiring Insurance Card will list the total number of Active Insurance and Insurance Expiring in 90 days.

To access your Active and Expiring Insurance Details:

- Click on the **Active and Expiring Insurance Card**. The example below shows 1 Active Insurance.

Jurisdiction	Licensor ID	Initial Issue Date	Renewal Date	Licensor Type	Licensor Status
NORTH CAROLINA (NC)		9 years ago		Insurance Producer	Active
IOWA (IA)		9 years ago	In 2 years	Insurance Producer	Active
WEST VIRGINIA (WV)		9 years ago	In 1 year	Insurance Producer	Active
INDIANA (IN)		9 years ago	In 1 year	Producer - Individual	Active
OHIO (OH)		9 years ago	In 9 months	MAJOR LINES	Active

By clicking on the **Active and Expiring Insurance Card**, the system will allow you to view details.

Insurance ID	Insurance Type	Expiration Date	Insurance Name	Limit Per Occurrence	Limit Annually	File Name	Attachments
	E&O Insurance	Jun 1, 2023	Admiral Insurance Company	2,000,000.00	5,000,000.00	HealthShare E&O 2021-22 Certificate.pdf	

By clicking on the **Attachments** icon, you can select and view documents.

Insurance ID	Insurance Type	Expiration Date	Insurance Name	Limit Per Occurrence	Limit Annually	File Name	Attachments
0000026003	E&O Insurance	Jun 1, 2023	Admiral Insurance Company	2,000,000.00	5,000,000.00	HealthShare E&O 2021-22 Certificate.pdf	



BACKGROUND CHECKS

The Background Checks Card will list Background type and status.

To access your Background Checks Details:

- Click on the **Background Checks Card**. The example below shows 1 Background Check.

The screenshot shows the CareSource Individual Overview page. The 'Compliance' section contains four cards: 'Active and Expiring Insurance' (0 Active, 0 Expiring in 90 days), 'Active and Expiring Licenses' (7 Active, 0 Expiring in 90 days), 'Active and Expiring Appointments' (5 Active, 0 Expiring in 90 days), and 'Education' (5 Records). The 'Background Checks' card is highlighted with a red box and shows 1 of 1 records. Below it, the 'Producer Licenses' table is visible.

License State	License ID	Initial Issue Date	Termination Date	License Type	License Status
WEST VIRGINIA (WV)		2 years ago	in 1 year	Insurance Producer	Active
KENTUCKY (KY)		2 years ago	in 1 year	Agent	Active
OHIO (OH)		2 years ago	in 7 months	MAJOR LINES	Active
GEORGIA (GA)		2 years ago	in 7 months	Agent-Resident	Active
GEORGIA (GA)		2 years ago	in 7 months	Agent-Nomadic	Active

By clicking on the **Background Checks Card**, the system will allow you to view Background Check detail.

Example below shows the Background detail.

The screenshot shows the 'Background Detail for Oboarding' card. It displays the status as 'Active' and the background type as 'Oboarding'. Below this, the 'Detail Information' section shows the effective date as 'Sep 28, 2022' and the response type as '2'. The 'Files' section shows a table with columns for File Name, Date Submitted, File Size, and User Name, but it indicates 'No data found. Try adjusting the filter settings.' The 'My Tasks' section also shows a table with columns for Task ID, Task Name, System Status, Task Type, Priority, Date Created, and Due Date, but it also indicates 'No data found. Try adjusting the filter settings.'



To access your **Active and Expiring Licenses Details**:

-
- The screenshot displays the 'Individual Overview' page for a user in the 'ConfSource' system. The page is divided into several sections, each with a teal header and a light green body. The 'Active and Expired Licenses' section is highlighted with a red border. It shows 7 active licenses and 0 expired licenses, both expiring in 30 days. Below this, there are sections for 'Background Checks' and 'Pending Licenses'. The 'Background Checks' section shows a 'Background Type' of 'Initial' and a 'Status' of 'Active'. The 'Pending Licenses' section shows a 'License ID' of 'WEST VIRGINIA JWS', an 'Initial Issue Date' of '2 years ago', a 'Renewal Date' of 'in 1 year', a 'License Type' of 'Insurance Broker', and a 'License Status' of 'Active'.
- | Active and Expired Licenses | |
|-----------------------------|--------------------|
| 0 | 0 |
| Active | Expired in 30 days |
- | Active and Expired Licenses | |
|-----------------------------|--------------------|
| 7 | 0 |
| Active | Expired in 30 days |
- | Active and Expired Appointments | |
|---------------------------------|--------------------|
| 5 | 0 |
| Active | Expired in 30 days |
- | Education | |
|-----------|---------|
| 5 | Records |
- | Background Checks | |
|-------------------|---------|
| Background Type | Initial |
| Checking | Active |
- | Pending Licenses | | | | | |
|-------------------|--------------------|--------------|------------------|----------------|--|
| License ID | Initial Issue Date | Renewal Date | License Type | License Status | |
| WEST VIRGINIA JWS | 2 years ago | in 1 year | Insurance Broker | Active | |

Example below shows the license detail.

[illegible]

Environment: Production

License ID: License Type: Agency Initial Issue Date: Apr 20, 2021 Termination Date: Aug 31, 2024 License Status: Active

Geography: GEORGIA (GA), FLORIDA (FL), KENTUCKY (KY), NORTH CAROLINA (NC), OHIO (OH), WEST VIRGINIA (WV)

License ID	License Title	Initial Issue Date	Termination Date	License Status	Actions
Agency Production	Agency Production	Apr 20, 2021	Aug 31, 2024	Active	
Agent 1	Agent 1	Apr 20, 2021	Aug 31, 2024	Active	
WALTER LANCE	WALTER LANCE	Apr 20, 2021	Aug 31, 2024	Active	
Agent-Resident	Agent-Resident	Oct 26, 2022	Aug 31, 2025	Active	
Agent-Resident	Agent-Resident	Oct 26, 2022	Aug 31, 2025	Active	
WESTERN PRODUCER - INDIVIDUAL	WESTERN PRODUCER - INDIVIDUAL	Apr 18, 2021	Aug 31, 2023	Active	
Producer - Individual	Producer - Individual	Apr 18, 2021	Aug 31, 2023	Active	



ACTIVE AND EXPIRING APPOINTMENTS

The Active and Expiring Appointments Card will list agent/agency appointment status.

To access your **Active and Expiring Appointments Details**:

- Click on the **Active and Expiring Appointments Card**. The example below shows 5 Active Appointments and zero Expiring Appointments.

Jurisdiction	License ID	Initial Issue Date	Renewal Date	License Type	License Status
WEST VIRGINIA (WV)	348385-WV	2 years ago	in 1 year	Insurance Producer	Active
KENTUCKY (KY)	348385-KY	2 years ago	in 1 year	Agent	Active
OHIO (OH)	348385-OH	2 years ago	in 7 months	SAUER JAMES	Active
GEORGIA (GA)	348385-GA	2 years ago	in 7 months	Agent-Resident	Active
INDIANA (IN)	348385-IN	2 years ago	in 7 months	Agent-Nonresident	Active

By clicking on the **Active and Expiring Appointments Card**, the system will allow you to view each appointment detail.

Example below shows the Appointment detail.

Jurisdiction	Appointing Company	Appointment ID	Effective Date	Expiration Date	Status
☐ GEORGIA (GA)	CareSource GA Co	348385-GA	Oct 29, 2021	Jan 1, 2020	1
☐ WEST VIRGINIA (WV)	CareSource WV Co	348385-WV	Nov 18, 2021	Jan 1, 2020	1
☐ OHIO (OH)	CareSource OH	348385-OH	Apr 15, 2021		1
☐ OHIO (OH)	CareSource OH	348385-OH	Apr 15, 2021		1
☐ INDIANA (IN)	CareSource IN	348385	Apr 15, 2021		1

By selecting **Active** or **InActive** in the dropdown, you can filter for each specific detail.

Status: **OK** **Reset** **Adapt Filters (1)**

- ☐ Active
- ☐ InActive



EDUCATION

The Education Card will list the total number of Certifications.

To access your Education Details:

- Click on the **Education Card**. The example below shows 5 Certifications.

The screenshot shows a 'Compliance' dashboard with several cards. The 'Education' card is highlighted with a red border and displays '5 Records'. Other cards include 'Active and Expiring Insurance' (0 Active, 0 Expiring in 90 days), 'Active and Expiring Licenses' (7 Active, 0 Expiring in 90 days), 'Active and Expiring Appointments' (5 Active, 0 Expiring in 90 days), 'Background Checks' (1 of 1), and 'Producer Licenses' (1 of 1).

By clicking on the **Education Card**, the system will allow you to view each **Certification**.

Example below shows the Certifications.

The screenshot shows a table titled 'Education (5)' with the following columns: Producer ID, Institution / Facility Name, Education Type, Education Status, Certification Start Date, Certification End Date, and Graduation Date. The table contains 5 rows of certification data.

Producer ID	Institution / Facility Name	Education Type	Education Status	Certification Start Date	Certification End Date	Graduation Date
	CSTRNG	Credentia Medicare Product Certification	Passed	Sep 19, 2022	Dec 31, 2023	Sep 19, 2022
	FFM Certificate	FFM Certificate	Passed	Nov 1, 2022	Oct 31, 2023	Aug 22, 2022
	AHP Certificate	AHP Certificate	Passed	Aug 4, 2022	Dec 31, 2023	Aug 4, 2022
	FFM Certificate	FFM Certificate	Passed	Jan 1, 2022	Oct 31, 2022	Aug 31, 2021
	FFM Certificate	FFM Certificate	Passed	Apr 15, 2021	Dec 31, 2021	Apr 14, 2021

Click on a specific line to open a specific **Certification** detail.

Example shows highlighted line to be viewed.

The screenshot shows the same 'Education (5)' table as before, but with the first row (CSTRNG) highlighted in blue, indicating it is the selected certification for detail view.



The example below shows the specific FFM Certification detail.

CareSource

Education Detail for

Education - MKTPLC - FFM Certificate

Education ID: MKTPLC

Institution / Facility Name: FFM Certificate

Education Status: Passed

Detail Information

Education ID: MKTPLC

Institution / Facility Name: FFM Certificate

Education Type: FFM Certificate

Education Status: Passed

Product Code: --

Certification Start Date: Nov 1, 2022

Certification End Date: Oct 31, 2023

Graduation Date: Aug 02, 2022

License Type: --

License Class: --

License State: --

CEU Credits: --

CEU Credit Expiration: --

Comments: Obtained from AB_Registration_Completion_List Form data.healthcare.gov on 8/24/2022

Education Reference Fields

Score: --

License Number: --

Company Code: --

CMS Core Training: --

Product / Training: --

Files

Files

File Name

Date Uploaded

File Size

View/Name

Download

No data found. Try adjusting the filter settings.



PRODUCER LICENSES

The Producer Licenses Card will list the Producer Licenses.

To access your **Producer Licenses Details**:

- Click on the **Producer Licenses Card**. The example below shows 5 of 7 Producer Licenses.

The screenshot shows the 'Individual Overview' page with several cards. The 'Producer Licenses' card is highlighted with a red box. It displays a table of licenses for the individual.

Jurisdiction	License ID	License Type	Initial Issue Date	Termination Date	License Status
WEST VIRGINIA (WV)		Insurance Producer	2 years ago	n/a	Active
KENTUCKY (KY)		Agent	2 years ago	n/a	Active
INDIANA (IN)		PRODUCER - INDIVIDUAL	2 years ago	n/a	Active
GEORGIA (GA)		Agent-Resident	2 years ago	n/a	Active
GEORGIA (GA)		Agent-Nonresident	2 years ago	n/a	Active

By clicking on the **Producer Licenses Card**, the system will allow you to view all licenses.

Example below shows the complete list and license detail.

The screenshot shows the 'Producer License Search' page. It includes filter dropdowns for Jurisdiction, License ID, License Type, Initial Issue Date, Termination Date, and License Status. Below the filters is a table of licenses.

Jurisdiction	License ID	License Type	Initial Issue Date	Termination Date	License Status
GEORGIA (GA)		Agent-Resident	Oct 26, 2021	Aug 31, 2023	Active
GEORGIA (GA)		Agent-Nonresident	Oct 26, 2021	Aug 31, 2023	Active
INDIANA (IN)		PRODUCER - INDIVIDUAL	Apr 15, 2021	Aug 31, 2023	Active
INDIANA (IN)		Producer - Individual	Apr 15, 2021	Aug 31, 2023	Active
KENTUCKY (KY)		Agent	Jan 25, 2022	Aug 31, 2024	Active
WEST VIRGINIA (WV)		Insurance Producer	Nov 25, 2021	Aug 31, 2024	Active

By using the filter dropdowns, you may choose specifics. The example below shows filtered by Jurisdiction for Georgia.

Click OK on far right of screen after choosing state.

The screenshot shows the 'Producer License Search' page with the 'Jurisdiction' filter set to 'GEORGIA (GA)'. The 'OK' button is highlighted with a red box.

Standard (default)

Jurisdiction: **GEORGIA (GA)**

☒ GEORGIA (GA)
☐ IOWA (IA)
☐ INDIANA (IN)
☐ KENTUCKY (KY)
☐ NORTH CAROLINA (NC)
☐ OHIO (OH)
☐ VIRGINIA (VA)
☐ WEST VIRGINIA (WV)

OK Reset Adapt Filters (2)



Example below shows results for Georgia licenses.

License ID	License Type	Initial Issue Date	Termination Date	License Status
342760	Agent Resident	Oct 26, 2021	Aug 21, 2023	Active
342761	Agent Resident	Oct 26, 2021	Aug 21, 2023	Active

By clicking on either line, the system will show specific license detail.

Example below shows the first of two Georgia license details.

License ID	License Name	License Type	License Status
342760	Agent Resident	Agent Resident	Active

By scrolling down on this page, you can view **Files** which may include a PDF copy of the state license.

The PDF may be downloaded by clicking on the Attachment button on far right.

File Name	File Type	File Size	Attachment
LIC.pdf	Oct 26, 2021	12,529	Attachment

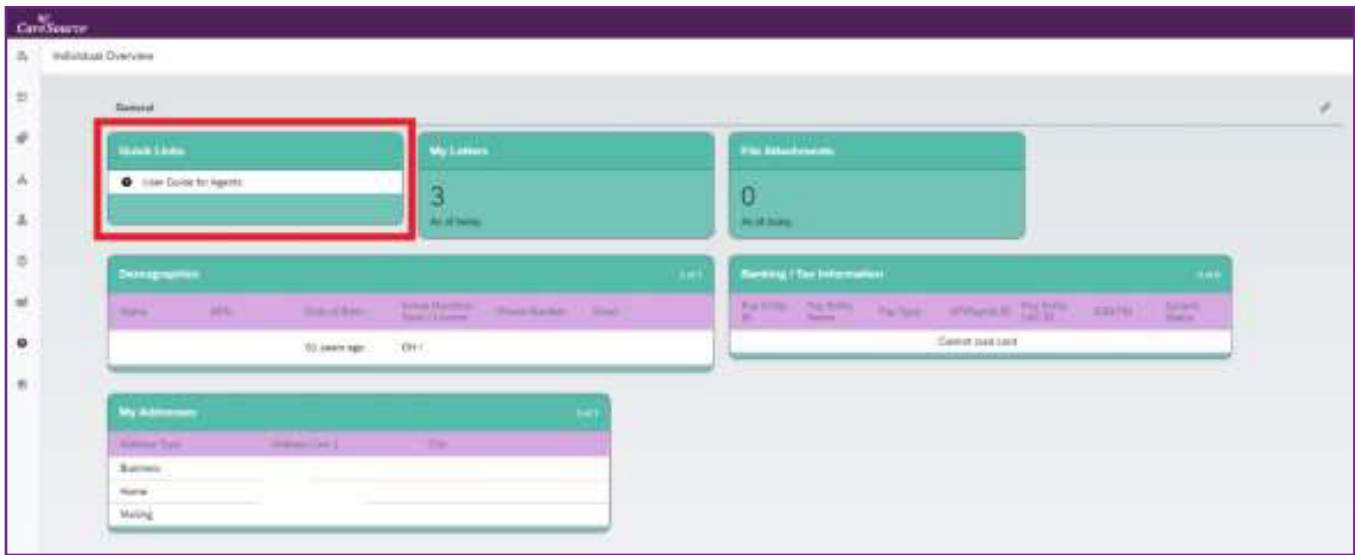


QUICK LINKS

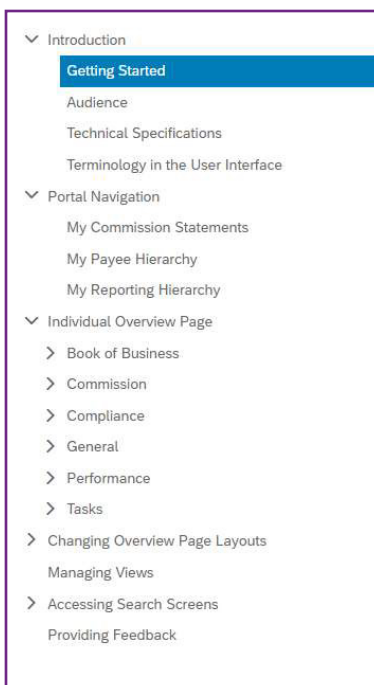
The Quick Links Card will provide links to useful documentation.

To access your Quick Links:

- Click on the **Quick Links Card**. The example below shows the link for the User Guide.



By clicking on that link, you will be taken directly to the **User Guide** which can be viewed and downloaded to PDF.





MY LETTERS

The My Letters Card will house all letters sent to the agent.

To access your **My Letters Details**:

- Click on the **My Letters Card**. The example below shows 3 Letters.

The screenshot shows the 'My Letters Card' highlighted with a red box. It displays a count of 3 letters. Other cards visible include 'Quick Links', 'Attachments', 'Demographics', 'Billing / Plan Information', and 'My Address'.

By clicking on the **My Letters Card**, you can view each letter detail.

The screenshot shows the 'Letter History Search Results' page. A table lists three letters with their dates: Aug 18, 2022; Aug 5, 2022; and Apr 7, 2022. The 'Letter History (3)' link is highlighted with a red box, and the 'Attachments' column for the first letter is also highlighted with a red box.

By clicking on the **Attachment** down arrow, you can open and view the letter.

The example below shows details of the top (most recent) letter.

The screenshot shows the details of a letter dated 8/18/22, addressed to Helen. The letter body contains information about a license renewal and a reminder to update the license. The footer includes the CareSource logo and contact information for the Bureau of Health Services.

HIPAA information has been removed.



DEMOGRAPHICS

The Demographics Card will list the producers' demographics.

To access your Demographics Details:

- Click on the **Demographics Card**. The example below provides the Name, NPN, Date of Birth, Resident State License, Phone Number and Email address.

Name	NPN	Date of Birth	Active Resident State License	Phone Number	Email
		82 years ago	OH /		

By clicking on the **Demographics Card**, you can view the information and make any changes by clicking on the **EDIT** button on top right of screen.

Demographics -

Producer ID: _____ Name: _____

Detail Information

Name: _____ NPN: _____ Date of Birth: Aug 18, 1962

Phone Number: _____ Email: _____

HIPAA has been removed from example.



MY ADDRESSES

The My Addresses Card will list the agents' Addresses.

To access your My Addresses Details:

- Click on the **My Addresses Card**. The example below shows Business, Home and Mailing addresses. HIPAA has been removed.

The screenshot shows the CoreSource Individual Overview page. The 'My Addresses' card is highlighted with a red box. It displays a table with columns for Address Type, Address Line 1, and City. The table lists three addresses: Business, Home, and Mailing.

Address Type	Address Line 1	City
Business		
Home		
Mailing		

By clicking on the **My Addresses Card**, you may view each address.

Click into each address to view and Edit if needed.

The screenshot shows the CoreSource Address Detail page for a Business address. The 'Edit' button is highlighted with a red box. The page displays various fields for address details, including Address Type, Full Name, and Contact Information.

Address - Business

Address Type: Business

Full Name: [Redacted]

Detail Information

Use This Address For: [Redacted]

Mailing Address

Address Type: Business

First Name: [Redacted] Middle Name: [Redacted] Last Name: [Redacted]

Name Suffix: [Redacted] Attention: [Redacted]

Address Line 1: [Redacted] Address Line 2: [Redacted] Address Line 3: [Redacted] Address Line 4: [Redacted]

City: [Redacted] State: [Redacted]

Zip / Postal Code: [Redacted] Country: USA

Contact Information

Contact Name: [Redacted] Office Phone: [Redacted] Fax: [Redacted]

Mobile: [Redacted] Contact Email: [Redacted]

Alternate Contact

Alternate Name: [Redacted] Alternate Contact Phone: [Redacted] Alternate Email: [Redacted]



BANKING/TAX INFORMATION

The Banking/Tax Information Card will list the agents Banking/Tax Information.

To access your **Banking/Tax Information Details**:

- Click on the **Banking/Tax Information Card**. HIPAA has been removed.

The screenshot shows the 'Individual Overview' page in the CureSource system. The page is divided into several sections: 'General', 'Demographics', 'My Addressess', 'My Letters', and 'Banking / Tax Information'. The 'Banking / Tax Information' section is highlighted with a red box. It contains a table with columns: 'The Order ID', 'The Order Name', 'The Type', 'The Order ID', 'The Order ID', 'The Order ID', and 'System Status'. The table has one row with the value 'Carnet card card'.

The Order ID	The Order Name	The Type	The Order ID	The Order ID	The Order ID	System Status
						Carnet card card

By clicking on the **Banking/Tax Information Card**, you may view the Banking Account and Routing Numbers, as well as the SSN on file. No example is provided.

By clicking into that line, you may Edit the information.



TOOLS & RESOURCES

The Tools & Resources Card will contain links to useful sources of information.

To access your Tools & Resources Details:

- Click on the **Tools & Resources Card**. The example below shows 5 Resources.
Training/CareSource
Plans & Services
Marketing Materials
Find My Prescriptions
Find A Doctor

Tools & Resources

Resource
Training CareSource
Plans & Services CareSource
Marketing Materials CareSource
Find My Prescriptions CareSource
Find a Doctor CareSource

Product Guide Download

Name	Content Type	Download
ProductGuide	pdf	[Download]

Enrollment Portals

Enrollment Link
2023 Medicare Enrollment Portal
Marketplace Self Service Enrollment Portal

Product Resource Access

Resource Link
Broker Service Department
Member Services Phone Numbers
Order Marketing Materials
Medicare Product Certification Training

Legal Disclaimers

Name	Content Type	Download
Legal & Compliance	HTML	[Download]

Examples:

By clicking on the **Training/CareSource** link, you will be directed to the Training site for current training videos and Enrollment FAQ.

TRAINING

Getting started selling CareSource products? Just need a refresher on how to use our tools? Preparing for an upcoming enrollment season? Here you'll find the training you need to get you up to speed.

Marketplace Enrollment Portal Training Video

Learn how to enroll new members through the CareSource Enrollment Portal, powered by HealthSherpa.

[LAUNCH TRAINING](#)

Marketplace Online Enrollment FAQ

Find answers to frequently asked questions about the HealthSherpa powered Enrollment Portal.

[READ THE GUIDE](#)

Marketplace Revenue Cycle Operations Guide

Review this overview for the Marketplace enrollee and member payment process, invoices and grace periods.

[READ THE REVENUE CYCLE GUIDE](#)



By clicking on the **Plans & Services** link, you will be directed to the Plan and service information per state.

Example below shows Ohio home page.

Producers Overview

GET CONTRACTED

BROKER SERVICE DEPARTMENT

PLANS & SERVICES

TRAINING

TOOLS & RESOURCES

QUICK LINKS

Apply To Become A Broker

Marketing Materials

Marketing Online Enrollment Guide

Producers Training Materials

PLANS & SERVICES

MARKETPLACE

CareSource was the first Marketplace insurer to receive an application at its launch in 2014 and since that time, we've covered counties as the only Marketplace insurer when all other insurers pulled out. We are committed to serving those who don't have insurance through their employer and don't qualify for other government programs.

Visit our Marketplace plan pages to learn more about our plans. To easily find benefit details on the plans we offer, visit the plan documents page for the plan type about which you are inquiring.

Service Area

Adams, Allen, Ashland, Athens, Auglaize, Brown, Butler, Carroll, Champaign, Clark, Clermont, Clinton, Columbiana, Coshocton, Crawford, Cuyahoga, Darke, Delaware, DeKalb, Erie, Fairfield, Fayette, Franklin, Fulton, Gallia, Geauga, Greene, Guernsey, Hamilton, Hancock, Hardin, Harrison, Henry, Highland, Hocking, Holmes, Huron, Jackson, Jefferson, Lake, Lawrence, Licking, Logan, Lorain, Lucas, Madison, Mahoning, Marion, Medina, Meigs, Mercer, Miami, Monroe, Montgomery, Morgan, Morrow, Muskingum, Noble.



2022 Service Area

By clicking on the **Marketing Materials** link, you will be directed to the Marketing Materials site and asked to select the specific state. Here you will find Marketing and Benefits Brochures and the link to use to order printed materials.

MARKETING MATERIALS

Select a State



Georgia



Indiana



Kentucky



Ohio



West Virginia



North Carolina

Tools & Resources

NEWSLETTERS

MARKETING MATERIALS

QUICK LINKS

Apply To Become A Broker

Marketing Materials

Marketing Online Enrollment Guide

Producers Training Materials

MARKETING MATERIALS

If you would like printed copies of any of these materials, please use PrintSource to order them. If you have encountered but have not yet located your PrintSource login, please contact our Broker Service department. Please see the PrintSource Quick Reference Guide for instructions on how to order materials.

Broker Compensation Disclosure Form

NEW! BCD FORMS AVAILABLE FOR ORDER NOW

NEW! BCD FORMS AVAILABLE FOR ORDER NOW

CareSource Dual Advantage Plans

2023 Forms, KRs, Fliers, Presentations & Brochures

Find Your County Below



By clicking on the **Find My Prescription** link, you will be directed to the Prescription Tools & Resources site.

Tools & Resources

QUICK START GUIDE

QUICK START STEPS FOR NEW MEMBERS

FIND A DOCTOR

WHERE TO GET CARE

FIND MY PRESCRIPTIONS -

Overview

Find A Pharmacy

Medication Therapy Management

RENEW YOUR BENEFITS

FILE A GRIEVANCE OR APPEAL +

CAREGIVER RESOURCES +

FORMS

FIND MY PRESCRIPTIONS

Select a Plan

Select your plan below to view more information!

Dual Special Needs
(Medicare + Medicaid)

Medicare Advantage (OH)

Medicaid

Marketplace

MyCare (OH)
(Medicare + Medicaid)

Planning for Healthy Babies (GA)

CareSource PASSE (AR)

By clicking on the **Find A Doctor** link, you will directed to the Find A Doctor Tool.

CareSource

FIND A DOCTOR

With more than 100,000 network providers across the coverage areas, and depending on your plan, you have plenty of choice when it comes to finding the best care available to meet your health needs.

Get Started

Skip

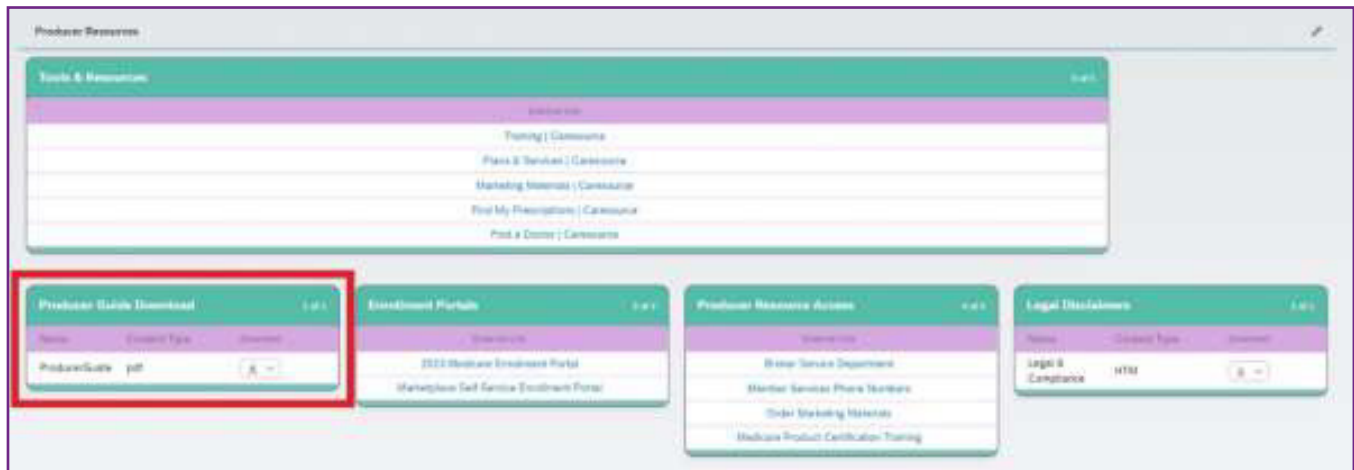


PRODUCER GUIDE DOWNLOAD

The Producer Guide Download Card provides the Producer Guide and option to print a copy.

To access your **Producer Guide**:

- Click on the download arrow on the **Card**.



Example below shows the Contents of the attached Producer Guide.

Contents	
ABOUT CARESOURCE	3
CONTRACTING	5
LICENSING AND APPOINTMENT	6
CERTIFICATION	7
CARESOURCE CODE OF CONDUCT	8
PENDED (WITHHELD) COMMISSIONS	10
CHARGEBACK DEBT RECOVERY	10
CHANGING PRODUCER OF RECORD	11
TRANSFERRING FMO	12
COMPLIANCE	14
AGENT, BROKER AND WEB BROKER EXPECTATIONS	16
SALES & MARKETING GRIEVANCE PROCESS	18
FRAUD, WASTE AND ABUSE (FWA)	19
HIPAA PRIVACY PRACTICES	20
NON-DISCRIMINATION NOTICE	21
MARKETING MATERIALS	23
PRODUCER SERVICE DEPARTMENT	23

24 ■■■■■ PRODUCER PORTAL GUIDE 25 ■■■■■

26 ■■■■■ AGENT AND BROKER COMPENSATION DISCLOSURE

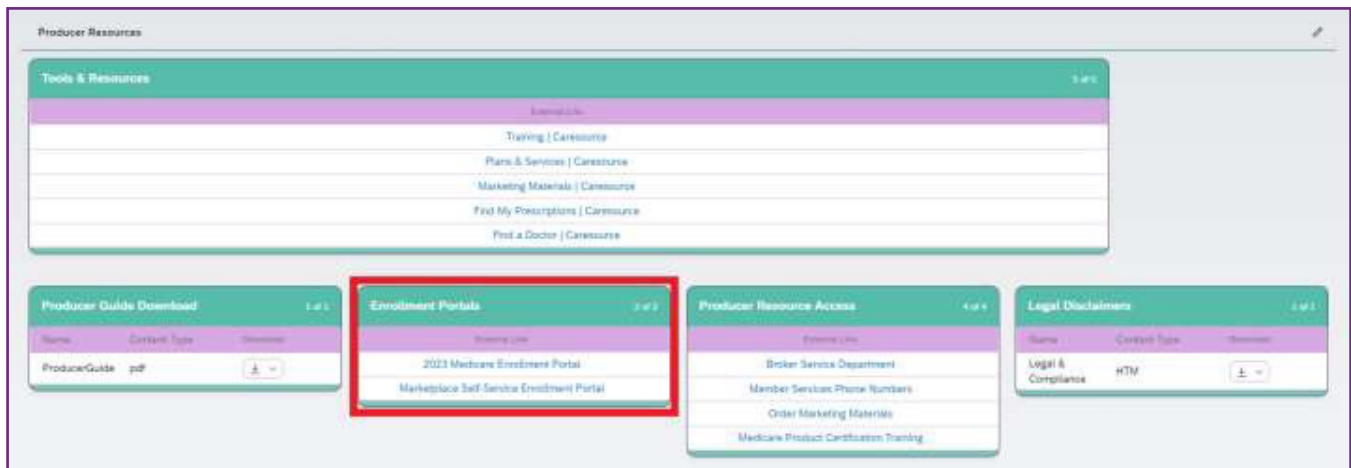


ENROLLMENT PORTALS

The Enrollment Portals Card will provide links to the Medicare and Marketplace Enrollment Portals.

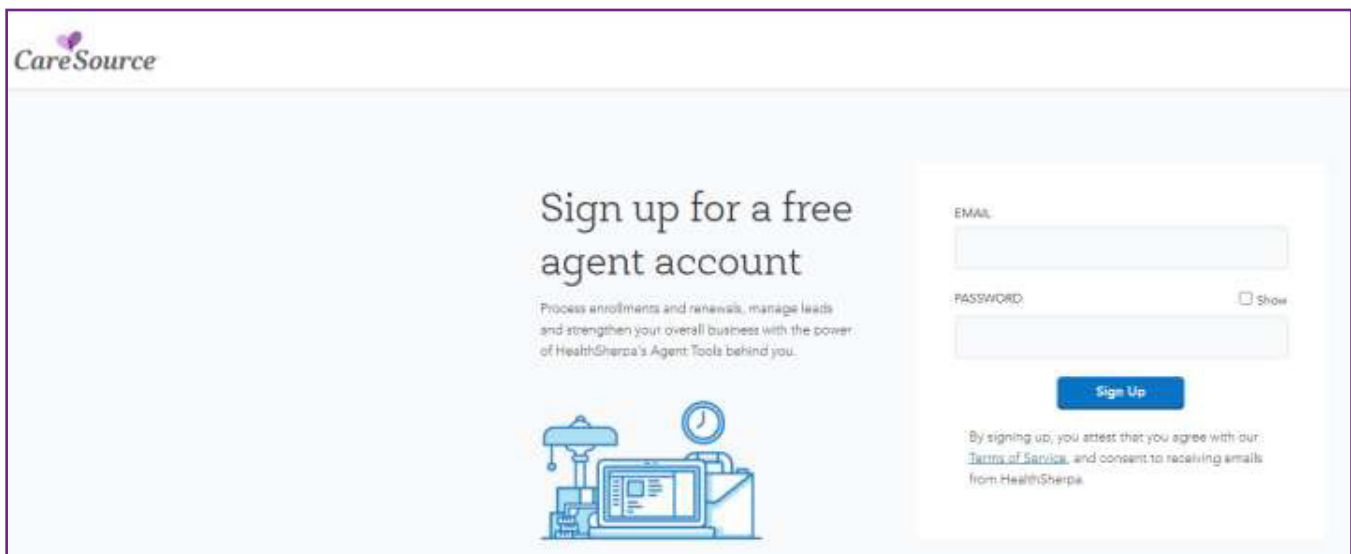
To access your Enrollment Portals links:

- Click on the Enrollment Portal External Link.



By clicking on the specific link, the system will direct you to the corresponding site.

Example below shows the CareSource site for Marketplace enrollments via HealthSherpa.





PRODUCERS RESOURCE ACCESS

The Producers Resource Access Card provides links to commonly used websites.

To access your Producers Resource Access External Links:

- Click on the Producers Resource Access Link. The example below shows 4 External Link options.

The screenshot shows a 'Producers Resource' card with several sections:

- Tools & Resources:** A table with links to Training, Plans & Services, Marketing Materials, Find My Prescriptions, and Find a Doctor, all pointing to CareSource.
- Producer Guide Download:** A table with a link to download the Producer Guide (pdf).
- Enrollment Portals:** A table with links to the 2023 Medicare Enrollment Portal and the Marketplace Self-Service Enrollment Portal.
- Producers Resource Access:** A table with links to the Broker Service Department, Member Services Phone Numbers, Order Marketing Materials, and Medicare Product Certification Training. This section is highlighted with a red border.
- Legal Disclaimers:** A table with a link to Legal & Compliance (HTML).

By clicking on the Producers Resource Link, the system will direct you to that specific site.

Example below shows the Brokers Service Department link.

The screenshot shows the CareSource website with the 'BROKER SERVICE DEPARTMENT' page. The page includes a navigation bar with links to Plans, Members, Providers, Producers, and About Us. A red banner at the top reads 'WANT TO SELL CARESOURCE? SELECT YOUR GENERAL AGENCY!' with a 'LEARN MORE' button. The main content area features a 'QUICK LINKS' section with links to 'Apply To Become A Broker', 'Marketing Materials', and 'Producers Training Materials'. Below this is a 'Select a State' section with maps of Georgia, Indiana, Kentucky, Ohio, and West Virginia. The page also includes a paragraph about CareSource's dedicated Broker Services department and its role in supporting producers throughout the agent lifecycle.



Example below shows the Member Services Phone Numbers link.

The screenshot shows the 'Member Services Phone Numbers' page. The left sidebar contains links for 'Member Overview', 'TOOLS & RESOURCES', 'CONTACT US', and 'QUICK LINKS' (My CareSource). The main content area lists phone numbers for various services: OHIO (Medicaid, Medicare Advantage, MA - Dual Special Needs, Marketplace, MyCare), KENTUCKY (Marketplace), and Community Transition Program (CTP). Each service includes its phone number and operating hours.

Example below shows the Order Marketing Materials link.

The screenshot shows the CareSource login page. It features the CareSource logo at the top, a 'Sign in' section with 'User Id' and 'Password' input fields, and a 'Login' button. Below the login fields, there is a link for password resets and a note stating that users must be actively contracted and appointed agents to access sales materials.

Example below shows the Medicare Product Certification Training link.

The screenshot shows the login page for Medicare Product Certification Training. It includes a CareSource logo, a prompt to enter username and password, and input fields for both. There are checkboxes for 'Show Password' and 'Remember me on this computer', a 'Login' button, and a link for 'I've forgotten my username/password'.



LEGAL DISCLAIMERS

The Producers Resource Access Card provides links to commonly used websites.

To access the Legal and Compliance Details:

- Click on the Legal and Compliance download button.

Producers Resource Access Card interface. The card is titled "Producers Resource Access" and contains several sections. The "Legal Disclaimers" section is highlighted with a red box. It shows a table with one row: "Legal & Compliance" with content type "HTM" and a download button.

Close-up screenshot of the "Legal Disclaimers" section. The table shows one row: "Legal & Compliance" with content type "HTM". The "Download" button is highlighted with a red box.

The Legal Disclaimers download will contain, but is not limited to:

- Terms and Conditions
- HIPAA Privacy practices
- Non-Discrimination Notice