

Broker Quick Reference Guide**Envisionrxplus.com****Broker Support: envisionagentsupport@envisionrx.com****Toll Free: 844-348-9604****WRITING CODE:**

You have been assigned a new Writing Code for 2018. Please begin to use this Writing Code for all applications you submit starting on 10/15/17. This writing code must be used for all application we receive after 10/15/17 even if you are enrolling someone for an 11/1/17 or 12/1/17 effective date. Your Writing Code can be found by logging into the Callidus Cloud Incentive Compensation Management System (ICM). After you have completed onboarding for 2018, you will receive an email with a link to login and your user id and password. You will be asked to change your password. You will find your Producer Number/Writing Code in the Demographics section. <https://eic.callidusinsurance.net/ICM/>

APPLICATION SUBMISSION:**Preferred Methods:**

1. Applications Submitted Electronically by Broker – Broker has collected the signed SOA and Paper Application from the enrollee either in person or by mail.
 - a. Broker has either met in person with the enrollee or their power of attorney, or talked to them over the phone about their PDP options and the enrollee has chosen EnvisionRxPlus as their PDP plan.
 - b. Broker has collected the signed SOA and Paper Application in person or through the mail from the enrollee or their designee (NEW IN 2018: SOA does not need to be signed 48 hours in advance)
 - c. Broker enters the application information through the envisionrxplus.com website by selecting Enroll and entering the primary residence zip code of the enrollee.
 - d. Select the Enrollment Period (AEP, IEP or SEP).
 - e. Select who is Enrolling? You will have two choices: If the broker received the signed application directly from the enrollee then check into the process through the **I Am Enrolling: For Myself**. If the broker received the signed application from the Power of Attorney then check into the process through the **I Am Enrolling: For Someone Else**.
 - f. Complete the application.
 - g. **Broker Information Section:**
 - i. **When the Broker is completing the online application they must check the box that says “I am the agent/broker”. Fill in your name, Writing Code and phone number. Check the Attestation box that you have in your possession the paper application and SOA signed by the member.**
 - h. Finish and submit the application online. You will receive immediate confirmation with the members EnvisionRxPlus ID number. Application will be processed to CMS for approval. Enrollment will be pending until CMS approves.
 - i. You will be able to track application status through the Callidus Cloud ICM system.
 - j. Do not Fax the SOA or the Paper Application to Envision. Keep in your records for auditing purposes and for 10 years in accordance with CMS regulations.

2. Applications Submitted Electronically by Enrollee – Broker is with the enrollee in person or by phone and the individual is completing the electronic application submission process and entering the brokers writing code appropriately directly into the website application.
 - a. SOA is necessary for ALL sales and the broker will keep it on file for 10 years
 - b. No paper application is needed if the enrollee is completing the application online themselves or online themselves with the broker present.
 - c. Enrollee that is with or without their agent can enroll online and the broker can still be designated as the agent of record. Enrollee will follow the Enroll Now path or Let's Find A Plan path on the envisionrxplus.com website. The first step will be to pick the Enrollment Period (AEP, IEP or SEP). Next Screen will ask who is enrolling. They will have two choices: **I Am Enrolling: For Myself**. Or if it is an appropriate power of attorney or designee they would choose **I Am Enrolling: For Someone Else**.
 - d. Complete the application.

e. Broker Information Section:

- i. When the enrollee is completing this online application themselves and the broker is not present the member must check the box that says "I am the member working with an agent/broker". They will be asked to fill in the agent/brokers name; Broker Writing Code and phone number (optional)**
- f. Enrollee will finish and submit the application online. They will receive immediate confirmation with their EnvisionRxPlus ID number. Application will be processed to CMS for approval. Enrollment will be pending until CMS approves.
- g. You, the broker/agent will be able to track application status through the Callidus Cloud program
- h. No paper forms will be sent to Envision. The Agent will still keep the SOA on file for auditing and for 10 years in accordance with CMS regulation.

Alternative Method: **NEW FAX 844-645-0583**

1. Fax paper applications to EnvisionRxPlus at this NEW FAX LINE only if one of the electronic methods above was not followed. **NEW FAX 844-645-0583 PLEASE MAKE NOTE OF THIS NEW NUMBER IN YOUR FAX SYSTEMS.**
2. **ONLY SUBMIT ONE APPLICATION PER FAX**

ORDERING SUPPLIES:

Upon certification and appointment (if necessary), an initial start-up kit will be mailed to you.

Additional marketing materials can be ordered on our website at envisionrxplus.com; Broker Tab, and select Order Supplies. Or use this link: <https://envisionstore.convergenceweb.com>

All brokers will access the supply order site by logging in with the following information:

User Name: Your Email Address

Password: Envision 2018 Writing Code that you receive after you become a "ready to sell" broker for 2018 selling season
Please keep in mind that this log in is different than other sites you may use with Envision.

APPLICATION STATUS: <https://eic.callidusinsurance.net/ICM/>

After you complete 2018 onboarding and begin your AEP selling season, you will be able to track application status on the Callidus Cloud (ICM) broker portal. You will find Application Status in the left side Navigation section of the site.

COMMISSION STATEMENTS: <https://eic.callidusinsurance.net/ICM/>

Commission Statements will be available online through the Callidus Cloud (ICM) broker portal.

HELPFUL HINTS:

Correct Election Type/Period needs to be indicated in order for enrollment to process your application

- If the member is not in their IEP (initial enrollment period) & it is not AEP (annual enrollment period), then an **SEP REASON** needs to be specified on the application.
- SEP Qualifier examples include: LEC (losing employer coverage), involuntarily losing credible drug coverage, moving out of state, & moving out of a LTC Facility.

Late Enrollment Penalty

- To avoid clients being assessed an LEP, please fax declaration of credible coverage to 330.486.4801 Attn: Tracy or clients can call 866.250.2005 & do a verbal attestation. This form can be found in Resources on envisionrx.com

Application Submission Dates

- Do not submit an application on or after a clients requested effective date. This is out of compliance & enrollment will not be able to process that application.