
AGENT CONNECT TUTORIAL





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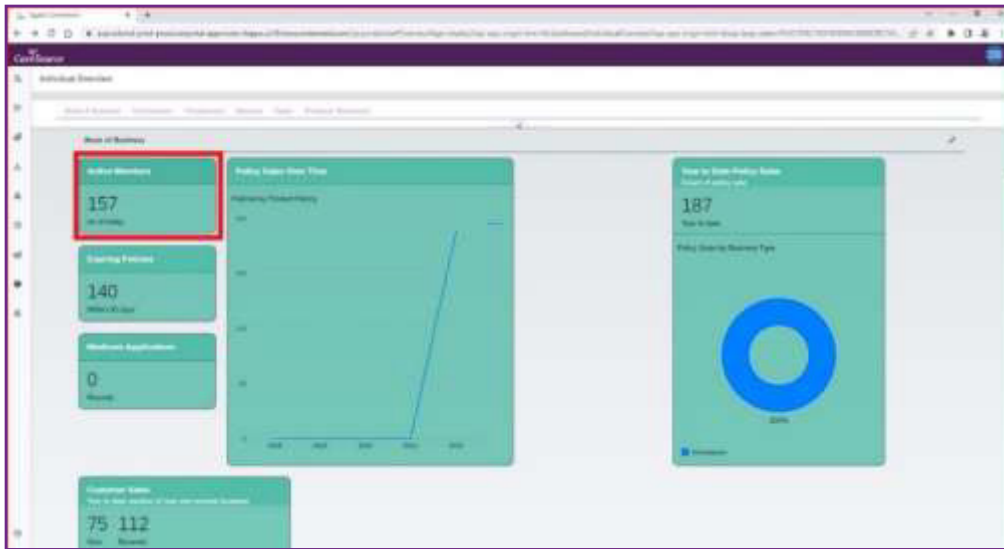


BOOK OF BUSINESS

The Book of Business Card will list the total number of current Book of Business.

To access your Book of Business Details:

- Click on the Book of Business Card. The example below shows 157 Book of Business.



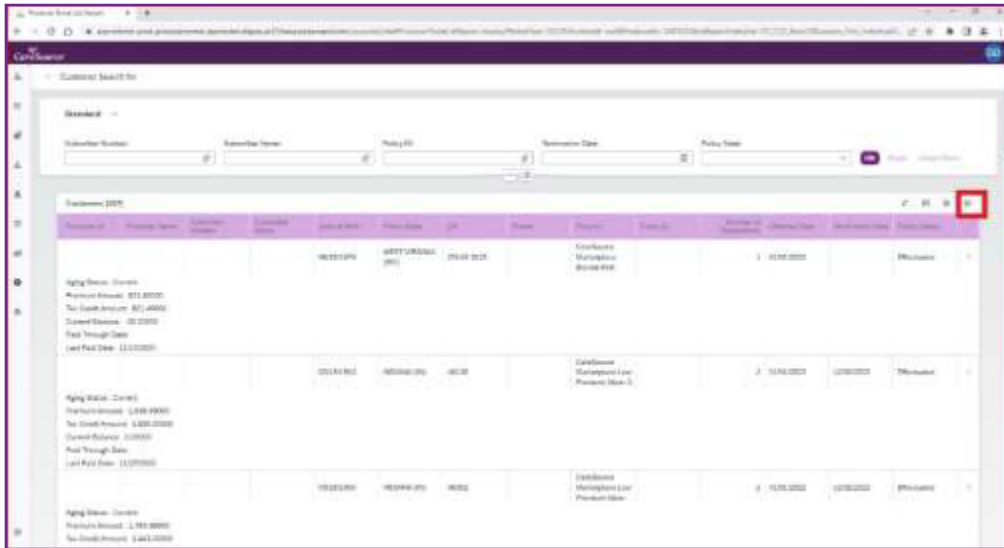
By clicking on the Book of Business Card, the system will allow you to view each member's detail.

Example below shows the member detail.

The screenshot shows a table of customer details. The table has columns for Customer ID, Customer Name, Policy ID, Renewal Date, Policy Type, and Status. The first row shows a customer with ID 1000000, Name 'John Doe', Policy ID 'POL123456', Renewal Date '2023-12-31', Policy Type 'Life Insurance', and Status 'Active'. The second row shows a customer with ID 1000001, Name 'Jane Smith', Policy ID 'POL123457', Renewal Date '2023-12-31', Policy Type 'Life Insurance', and Status 'Active'. The third row shows a customer with ID 1000002, Name 'John Doe', Policy ID 'POL123458', Renewal Date '2023-12-31', Policy Type 'Life Insurance', and Status 'Active'.



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.



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:

The screenshot shows the 'Individual Overview' dashboard. It features several cards: 'Book of Business' (232 As of today), 'Expiring Policies' (0 Within 90 days), 'Medicare Applications' (0 Records), 'Policy Sales Over Time' (line chart showing policies by product family from 2020 to 2024), 'Year to Date Policy Sales' (222 Year to date, donut chart for Marketplace at 100%), and 'Customer Sales' (24 198 New Renewal). A 'Report Requests' card is highlighted with a red box, containing a table with one row: 'Completed', 'Book of Business Excel Version', '02/01/2024', and a 'Download' button.

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

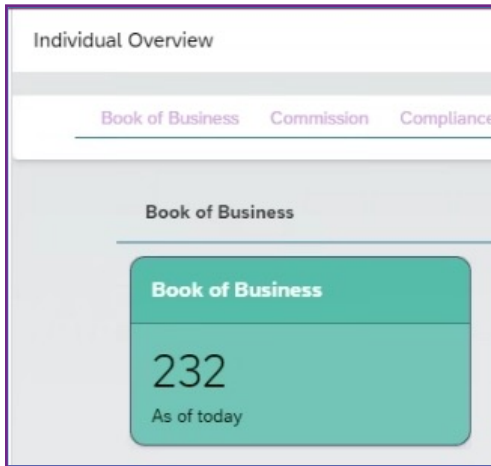
This close-up shows the 'Report Requests' table with the 'Download' button for the 'Book of Business Excel Version' row. The dropdown menu is open, showing a link labeled 'AXBookOfBusiness-20240201.XLSX'.

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

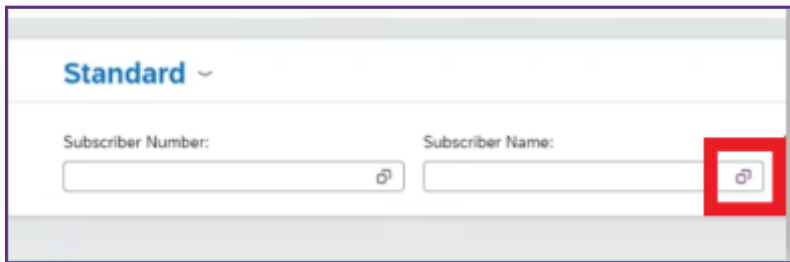


How To Download a Member ID Card:

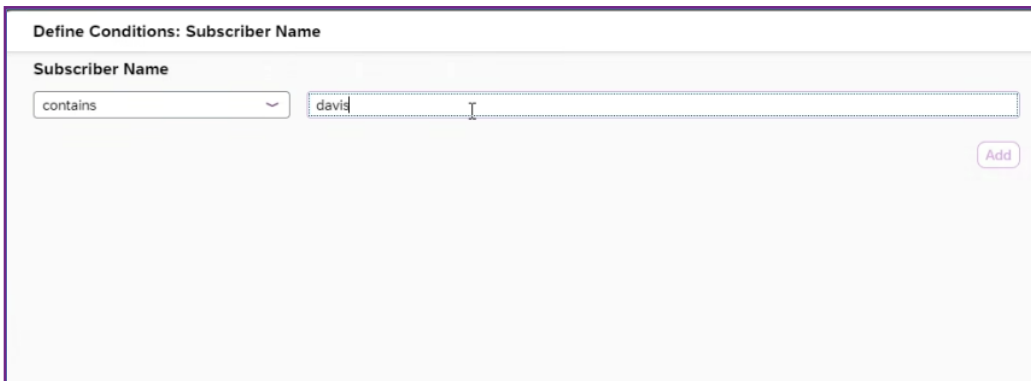
- Click into the **Book of Business** card:



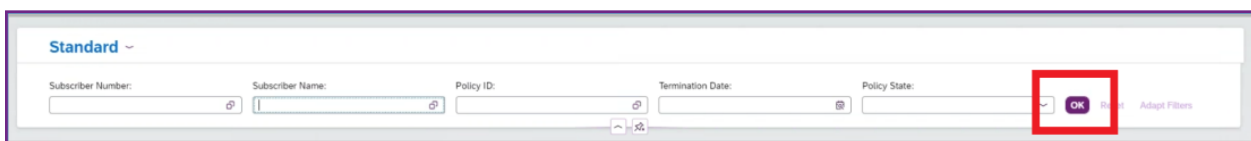
- To Search for a member by name, go to the **Subscriber Name** box and click on the search box icon:



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



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



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



Standard

Subscriber Number: [] Subscriber Name: ["davis" x] Policy ID: [] Termination Date: [] Policy State: [] [OK](#) [Reset](#) [Adapt 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													

- 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: 1107-000000000000

Health Plan:

Payer ID: INCS1

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

[Printable PDF](#)

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:
CareSource® Nurse Advice Line: 1-833-230-2099
TTY Service for Hearing Impaired: 1-800-743-3333 or 711
Dental: 1-855-209-3945
Vision: 1-833-337-9129
Hearing: 1-866-202-2561
Fitness: 1-877-771-2746

PROVIDER INFO:
Provider Services: 1-833-230-2101 | 855-1-800-431-7141
RxBin: 032638 | RPOCN: A4 | Rptg: R00004
Medical Claims: P.O. Box 3607, Dayton, OH 45401-3607

Coverage provided through the Health Insurance Marketplace.

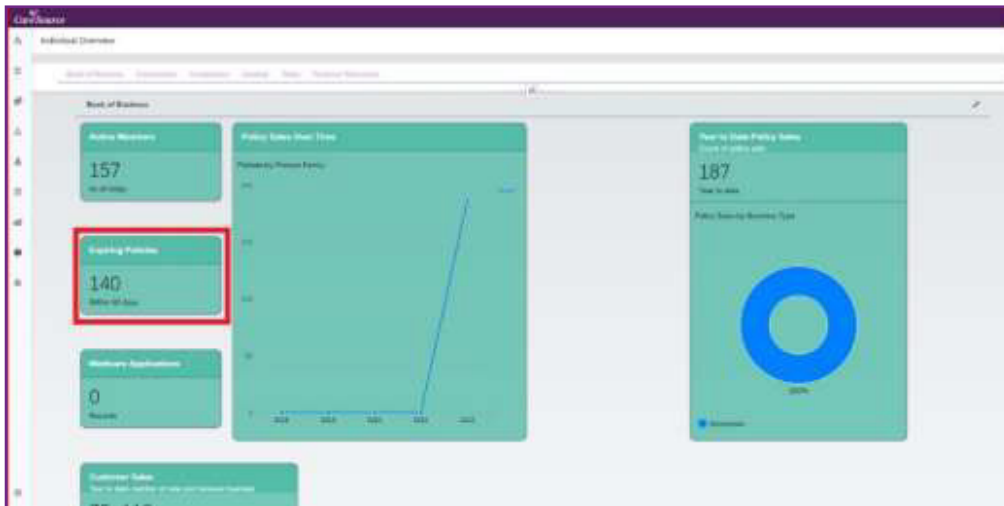


EXPIRING POLICIES

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 customer search results. The table has columns for Policy ID, Policy Name, and Termination Date. Three policies are listed, all with a Termination Date of 12/31/2022.

Policy ID	Policy Name	Termination Date
00281363	Cardicare Medicare Law Premium Low 2	12/31/2022
00281369	Cardicare Medicare Law Premium Low	12/31/2022
01001366	Cardicare Medicare Standard 1000 2 Dental, Vision, 8 Prescription	12/31/2022

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.

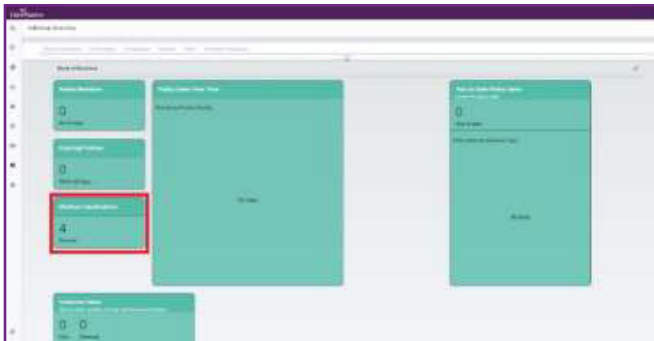


MEDICARE APPLICATIONS

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

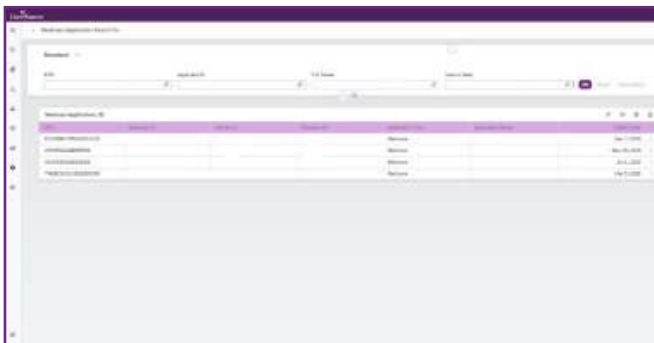
To access your Medicare Applications Details:

- 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.

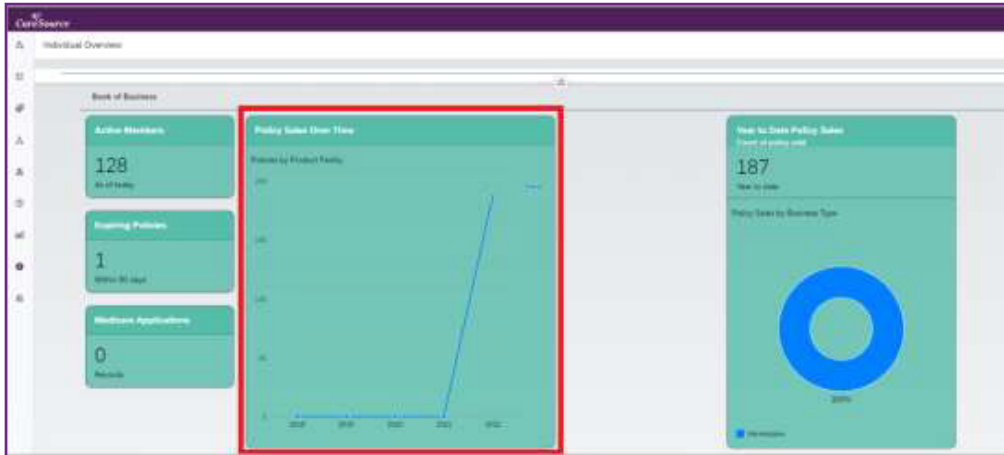




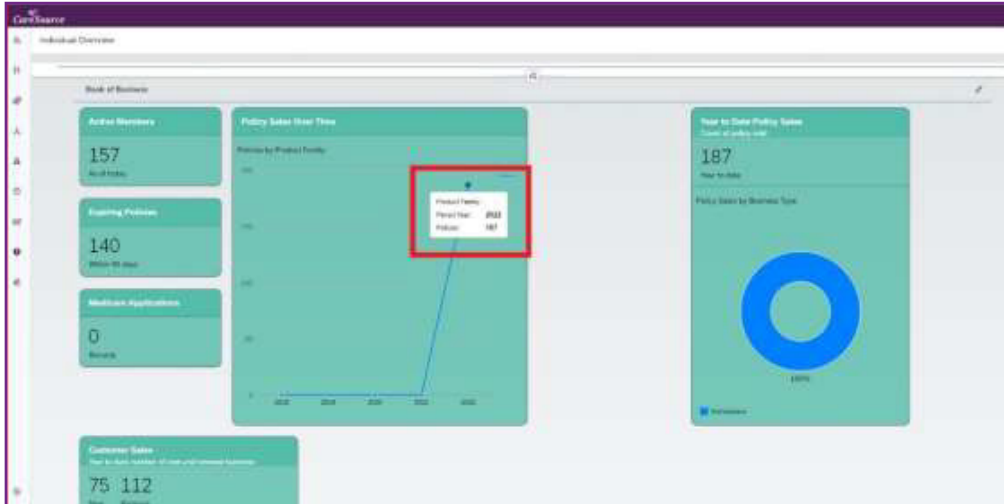
POLICY SALES OVER TIME

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

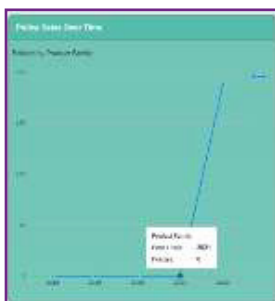
To access your Policy Sales Over Time, click on the card.



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



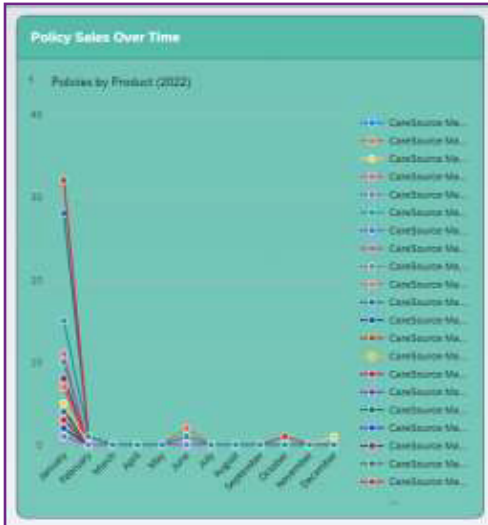
Examples below shows the policies for the calendar years 2021 and 2020.





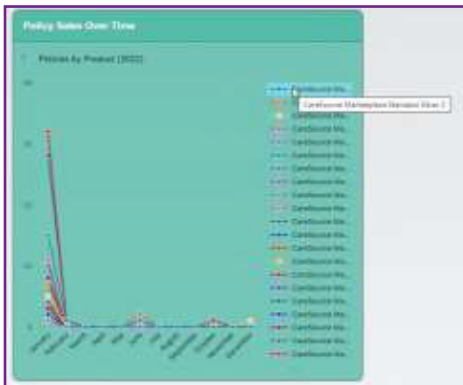
Click on the specific year to provide further details for that year.

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 a software interface for viewing member plan details. At the top, there are search filters for "Member Number", "Address", "State", "Plan", "Plan Name", "Year", "Policy Year", and "Policy Term". Below the filters is a table with columns: "Member Number", "Member Name", "Plan", "Plan Name", "Year", "Policy Year", "Policy Term", "Plan Type", "Plan Category", "Plan Code", and "Plan Description". Two rows of data are visible, each with a detailed pop-up window on the left showing member information such as "Member Number", "Plan Name", "Current Rate", "Last Change Date", and "Last Effective Date".



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 CareSource Marketplace plans. The 'CareSource Marketplace Bronze' and 'CareSource Marketplace Bronze Dental, Vision, & Fitness' options are highlighted in blue. The main table below shows two customer sales records with columns for Product ID, Product Name, Subscriber Number, Subscriber Name, Date of Birth, Policy ID, and Policy Name. The first record is for a customer with a birth date of 07/21/1969 and a policy ID of IN23A. The second record is for a customer with a birth date of 09/21/1965 and a policy ID of IN23A.

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 results filtered by product. The 'Product' column in the table is highlighted with a red box. The table displays three customer sales records. The first record is for a customer with a birth date of 03/21/1979 and a policy ID of IN23A. The second record is for a customer with a birth date of 04/06/1963 and a policy ID of OH0. The third record is for a customer with a birth date of 07/18/1963 and a policy ID of IN23A. The 'Product' column for each record is highlighted in blue, showing the specific plan name.

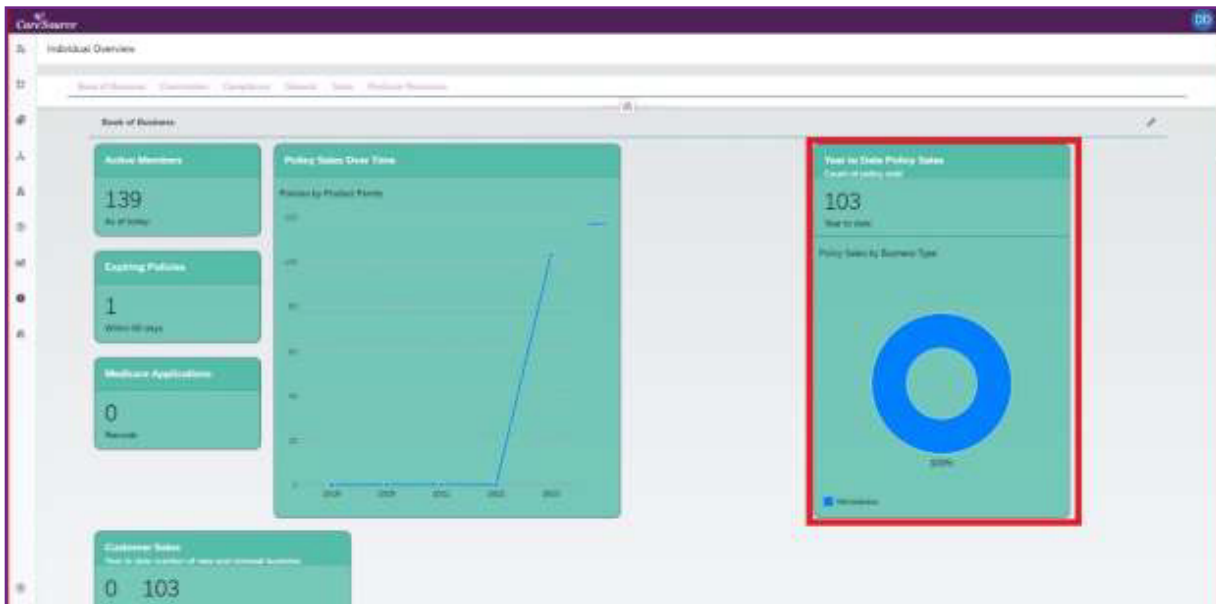


YEAR TO DATE POLICY SALES

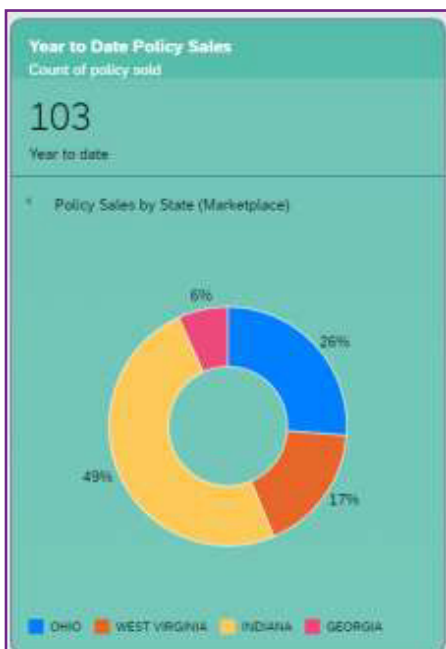
The Year to Date Policy Sales card will list your policy count for the current year.

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 for 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 (0/0)'. The table has columns for Product Name, Subscriber Number, Subscriber Name, Date of Birth, Policy State, ZIP, Name, Product, Policy ID, Number of Dependents, Effective Date, Termination Date, and Policy Status. Two rows are visible, both for 'CareSource Marketplace Bronze First Dental, Vision, & Fitness' policies. The first row has a Policy ID of 00201989 and an Effective Date of 01/01/2023. The second row has a Policy ID of 00001989 and an Effective Date of 01/01/2023. To the left of each row, there is a summary of policy details including Aging Status, Premium Amount, Tax Credit Amount, Current Balance, 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 search interface as above, but with the 'Product' dropdown menu open. The dropdown lists various product options, each with a checkbox. The 'Product' dropdown is currently set to 'CareSource Marketplace'. The table below the dropdown shows the same two rows as in the previous screenshot, but the 'Product' column is now empty, indicating that the filter is applied to the search results.



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.

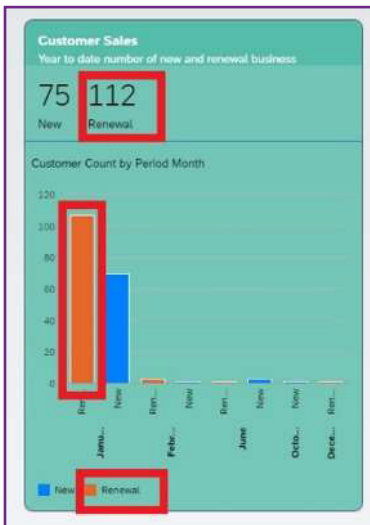




When clicking on **New**, the details are provided for all New Sales.

The screenshot shows the 'Customer Sales Search' interface. At the top, there are several filter fields: 'Subscriber Number', 'Subscriber Name', 'Policy ID', 'Product', 'Policy Status', 'Policy Type', and 'Policy Date'. The 'Policy Type' dropdown is highlighted with a red box and set to 'New'. Below the filters is a table with columns: 'Customer ID', 'Subscriber Name', 'Policy ID', 'Product', 'Policy Status', 'Policy Date', 'Contract Start Date', 'Contract End Date', and 'Policy Type'. The table contains three rows of data, each with a 'View' button to the right. The first row shows a 'New' policy, while the second and third rows show 'Renewal' policies.

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



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

This screenshot is similar to the first one, showing the 'Customer Sales Search' interface. The 'Policy Type' dropdown is highlighted with a red box and set to 'Renewal'. The table below shows three rows of data, all of which are 'Renewal' policies, as indicated by the 'Policy Type' column.



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 with a search filter set to 'Standard' and 'Process Year' set to '2022'. Below the search filters is a table titled 'Commission Statements (13)' listing monthly statements for 2022.

Payment Entry ID	Payment Name	Payment Type	Process Year	Process Month	Date Generated	Actions
		External Payout	2022	January	Jan 15, 2022	[+]
		External Payout	2022	February	Feb 15, 2022	[+]
		External Payout	2022	March	Mar 7, 2022	[+]
		External Payout	2022	April	Apr 12, 2022	[+]
		External Payout	2022	May	May 15, 2022	[+]
		External Payout	2022	June	Jun 14, 2022	[+]
		External Payout	2022	July	Jul 9, 2022	[+]
		External Payout	2022	August	Aug 15, 2022	[+]
		External Payout	2022	September	Sep 15, 2022	[+]
		External Payout	2022	October	Oct 20, 2022	[+]
		External Payout	2022	November	Nov 14, 2022	[+]
		External Payout	2022	December	Dec 9, 2022	[+]
		External Payout	2022	December	Dec 15, 2022	[+]



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 | 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 11, 2022 | Statement Number: 16438146970000 | File Type: PDF

Attachments

No data found. Try adjusting the filter settings.

Statement Commissions

Statement Commissions (134)

Payee Name	Period Start	Period End	Gross Pay	Net Pay	Hours	Rate	Commission	Total
CowSource Marketplace - Add Devic... Vouch & Pines	Dec 31, 2021	Dec 30, 2021	700.00 PH	700.00 PH	012021	012021	Yes	21.00
LawSource Marketplace - Bruce P...	Dec 31, 2021	Dec 30, 2021	700.00 PH	700.00 PH	012021	012021	Yes	21.00
CowSource Marketplace - Bruce P...	Dec 31, 2021	Dec 30, 2021	700.00 PH	700.00 PH	012021	012021	Yes	21.00
LawSource Marketplace - Bruce P...	Dec 31, 2021	Mar 30, 2022	700.00 PH	600.00 PH	022021	012021	Yes	21.00
CowSource Marketplace	Dec 31, 2020	Dec 30, 2021	700.00 PH	700.00 PH	022021	022021	Yes	18.00



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

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

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):

BillPeriod	New/Renewal	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

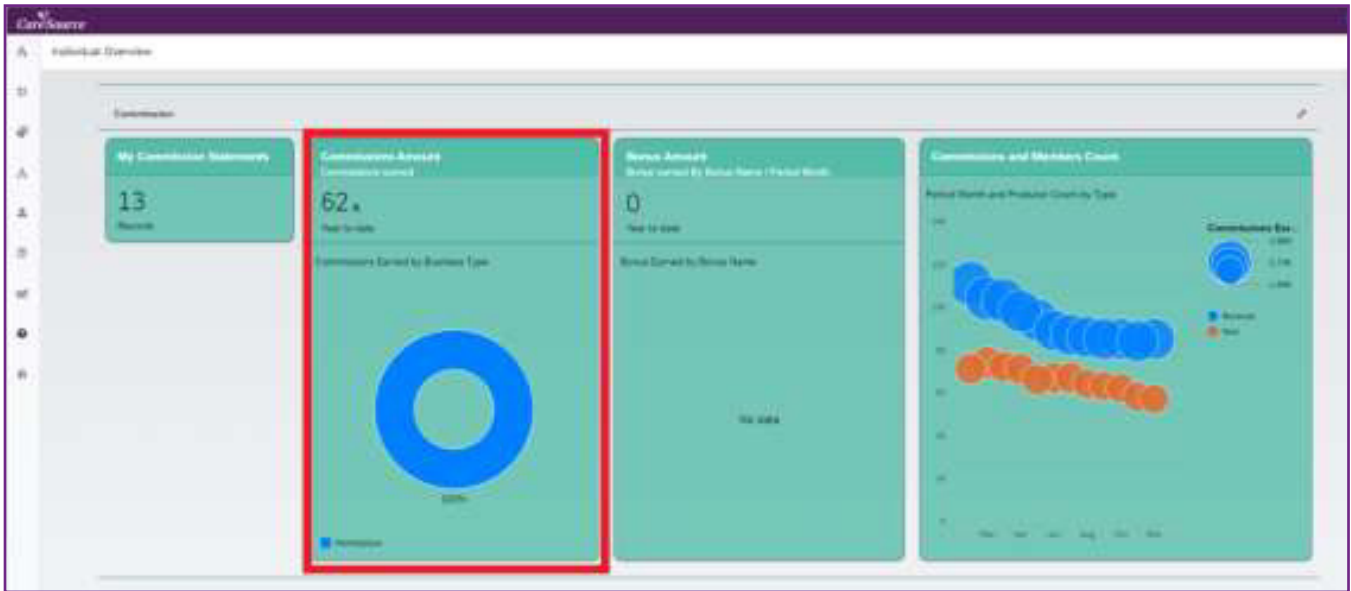


COMMISSION AMOUNT

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.

Policy ID	Member ID	Member Name	Period Year	Period Month	Policy Issue State	Product	Plan Type	Policy Type	Member Number	Enrolled	Commission Amount
10881101	12345		2022	January	OHIO (OH)	CareSource Marketplace Low Premium Silver 2	Marketplace	Renewal	10418412	Yes	20.00
10880402	23456		2022	January	INDIANA (IN)	CareSource Marketplace Bronze First Dental, Vision, & Fitness	Marketplace	Renewal	10418412	Yes	21.00
11792903	34567		2022	January	INDIANA (IN)	CareSource Marketplace Bronze First Dental, Vision, & Fitness	Marketplace	Renewal	10418412	Yes	21.00
10880402	45678		2022	January	OHIO (OH)	CareSource Marketplace Bronze First	Marketplace	Renewal	10418412	Yes	20.00
11208887	56789		2022	January	OHIO (OH)	CareSource Marketplace Low Premium Silver Dental, Vision, & Fitness	Marketplace	Renewal	10418412	Yes	43.00
10401772	67890		2022	January	INDIANA (IN)	CareSource Marketplace Bronze First Dental, Vision, & Fitness	Marketplace	Renewal	10418412	Yes	21.00

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

Policy ID	Member ID	Member Name	Period Year	Period Month	Policy Issue State	Product	Plan Type	Policy Type	Member Number	Enrolled	Commission Amount
10881101			2022	April	OHIO (OH)	CareSource Marketplace Low Premium Silver 2	Marketplace	Renewal		Yes	20.00
10880402			2022	April	INDIANA (IN)	CareSource Marketplace Bronze First Dental, Vision, & Fitness	Marketplace	Renewal		Yes	21.00
11791311			2022	April	GEORGIA (GA)	CareSource Marketplace Low Premium Silver 2 Dental, Vision, & Fitness	Marketplace	New		Yes	0.00
11208887			2022	April	OHIO (OH)	CareSource Marketplace Low Premium Silver Dental, Vision, & Fitness	Marketplace	Renewal		Yes	43.00
10401772			2022	April	INDIANA (IN)	CareSource Marketplace Bronze First Dental, Vision, & Fitness	Marketplace	Renewal		Yes	21.00

PHI has been removed.

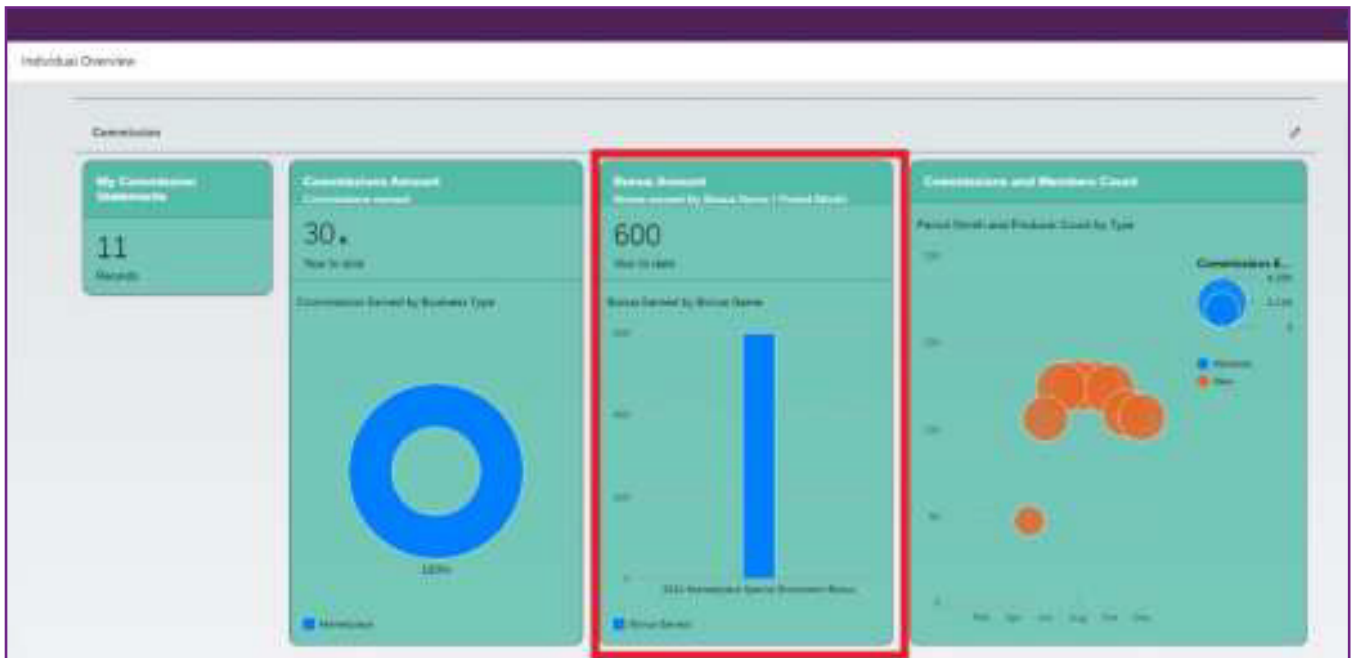


BONUS AMOUNT

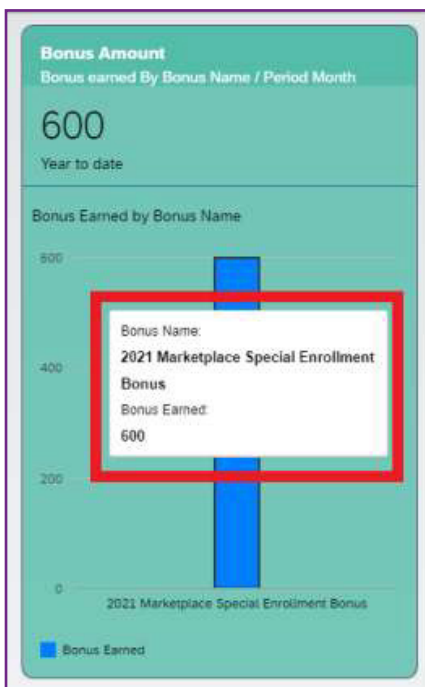
The Bonus Amount Card will provide Bonus earned by Bonus Name and Period Month.

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.

Standard (default) --

Bonus Name: [] Period Year: 2021 Period Month: [] System Status: [] Finalized: []

Bonus History (7)

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.

Standard (default) --

Bonus Name: [] Period Year: 2021 Period Month: [] System Status: [] Finalized: []

Bonus History (7)

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							

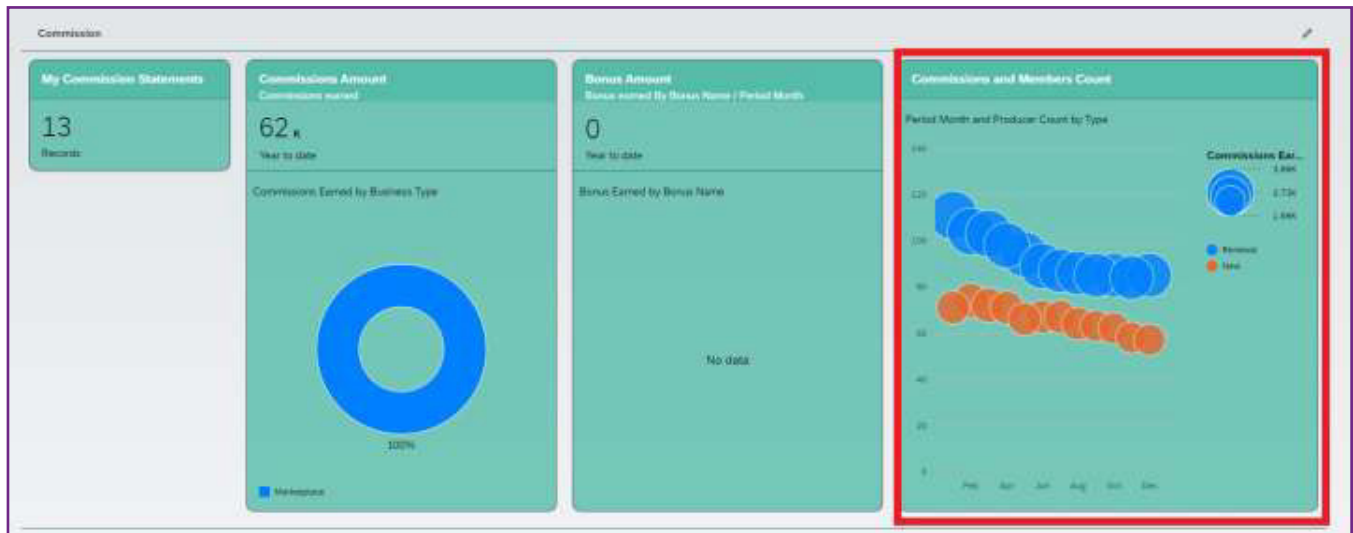


COMMISSIONS AND MEMBERS COUNT

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.

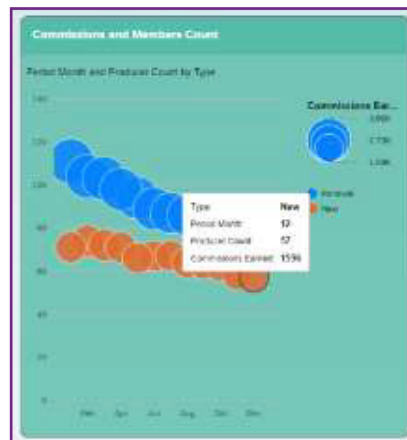
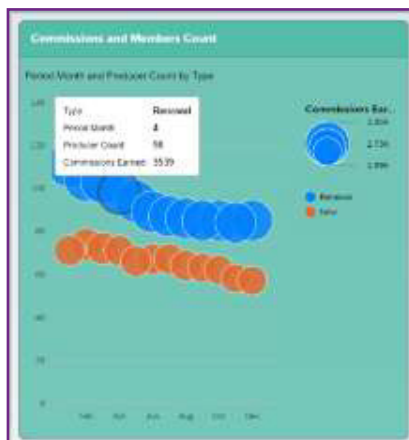


By hovering over the card, you can view specific month information at a glance.

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.

Policy ID	Member ID	Member Name	Period Year	Period Month	Policy Issue State	Product	Policy Type	Voucher Number	Process	Commissions Earned
			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 1	Marketplace	Renewal	Yes	63.00
			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, Dental, Vision, & Fitness	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.

Policy ID	Member ID	Member Name	Period Year	Period Month	Policy Issue State	Product	Policy Type	Voucher Number	Process	Commissions Earned
			2022	January	OHIO (OH)	CareSource Marketplace Gold	Marketplace	Renewal	Yes	40.00
			2022	February	OHIO (OH)	CareSource Marketplace Gold	Marketplace	Renewal	Yes	40.00
			2022	March	OHIO (OH)	CareSource Marketplace Gold	Marketplace	Renewal	Yes	40.00
			2022	April	OHIO (OH)	CareSource Marketplace Gold	Marketplace	Renewal	Yes	40.00
			2022	May	OHIO (OH)	CareSource Marketplace Gold	Marketplace	Renewal	Yes	40.00
			2022	June	OHIO (OH)	CareSource Marketplace Gold	Marketplace	Renewal	Yes	40.00
			2022	July	OHIO (OH)	CareSource Marketplace Gold	Marketplace	Renewal	Yes	40.00
			2022	August	OHIO (OH)	CareSource Marketplace Gold	Marketplace	Renewal	Yes	40.00
			2022	September	OHIO (OH)	CareSource Marketplace Gold	Marketplace	Renewal	Yes	40.00
			2022	October	OHIO (OH)	CareSource Marketplace Gold	Marketplace	Renewal	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	License ID	Initial Issue Date	Renewal Date	License Type	License Status
NORTH CAROLINA (NC)		9 years ago		Insurance Producer	Active
IDWA (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 Occur	Limit Annual	File Name	Attachment
	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 Occur	Limit Annual	File Name	Attachment
E00002603	E&O Insurance	Jun 1, 2023	Admiral Insurance Company	2,000,000.00	5,000,000.00	HealthShare E&O 2021-22 Certificate.pdf	

- HealthShare E&O 2021-22 Certificate.pdf
- HealthShare E&O 2020-22 Certificate.pdf
- HealthShare E&O 2015-2023 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 'Individual Overview' page in CareSource. It features several compliance 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). A 'Background Checks' card is highlighted with a red box, showing 1 of 1 checks. Below it is a table of 'Producer Licenses' with the following data:

Application	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-Nonresident	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 Onboarding' page. It displays the following information:

- Status:** Active
- Background Type:** Onboarding
- Detail Information:**
 - Background Type: Onboarding
 - Effective Date: Sep 28, 2022
 - Expiry Date: -
 - Date Requested: -
 - Response Type: 2
 - Next Renewal Request Date: -
 - ProdBackground Reason Code: -
 - Criteria: FAGS
- Files:** No data found. Try adjusting the filter settings.
- My Tasks:** No data found. Try adjusting the filter settings.

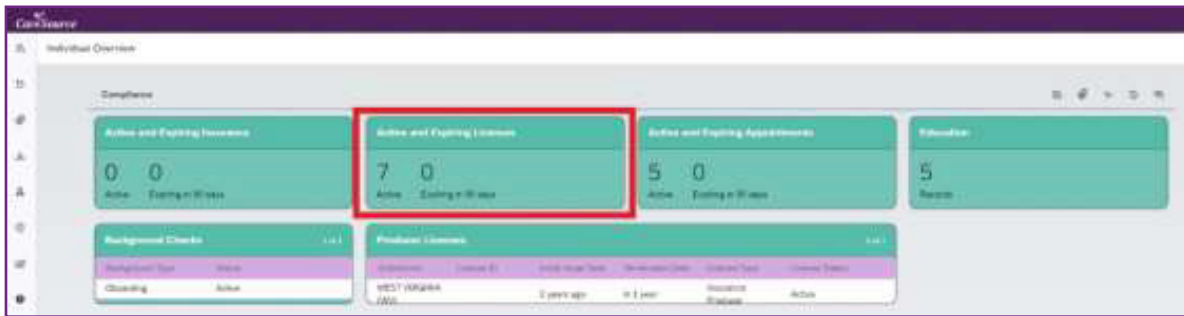


ACTIVE AND EXPIRING LICENSES

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

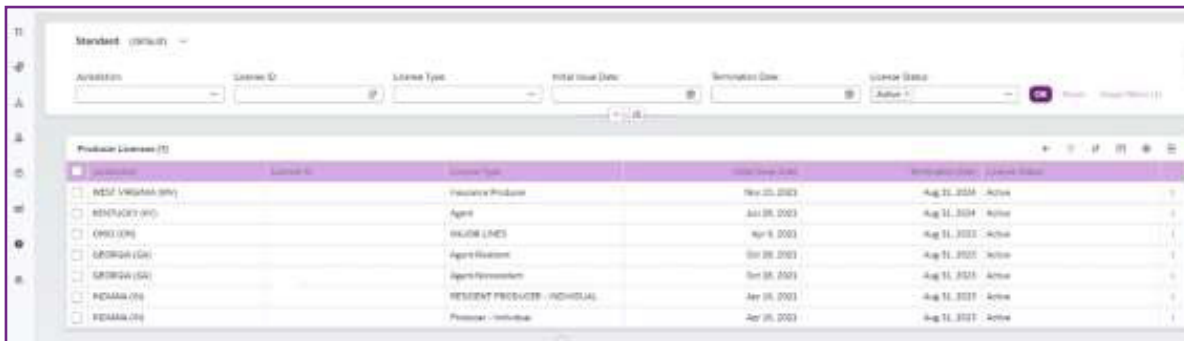
To access your Active and Expiring Licenses Details:

- Click on the **Active and Expiring Licenses Card**. The example below shows 7 Active Licenses.

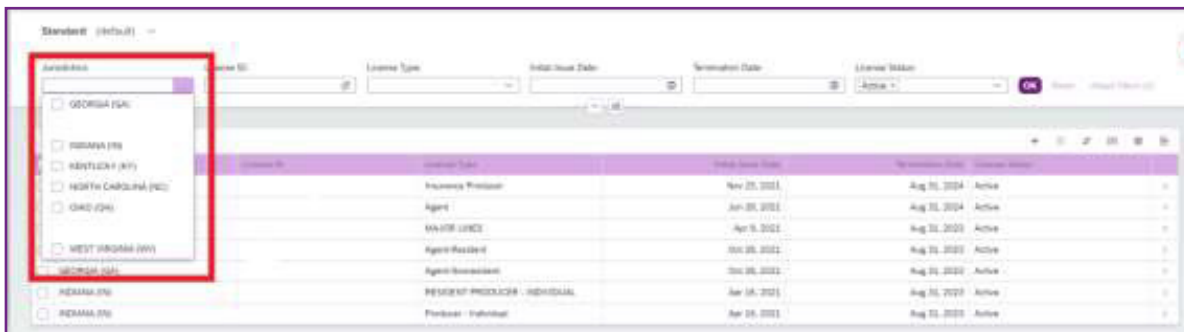


By clicking on the **Active and Expiring Licenses Card**, the system will allow you to view license detail.

Example below shows the license detail.



To filter by state, select from the **Jurisdiction** dropdown.





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.

The screenshot shows a dashboard with several cards. The 'Active and Expiring Appointments' card is highlighted with a red border and displays 5 Active and 0 Expiring appointments. Below it is a table of Producer Licenses.

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

The screenshot shows the 'Producer Appointments (5)' table with the following data:

Jurisdiction	Appointing Company	Appointment ID	Effective Date	Termination Date	Status
GEORGIA (GA)	CareSource GA Co	348385-GA	Oct 29, 2021	Jan 1, 2020	InActive
WEST VIRGINIA (WV)	CareSource WV Co	348385-WV	Nov 18, 2021	Jan 1, 2020	InActive
OHIO (OH)	CareSource OH	348385-OH	Apr 15, 2021		Active
OHIO (OH)	CareSource OH	348385-OH	Apr 15, 2021		Active
INDIANA (IN)	CareSource IN	302088	Apr 15, 2021		Active

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

The screenshot shows a 'Status:' dropdown menu with two options: Active and InActive. The 'Active' option is selected. Buttons for 'OK', 'Reset', and 'Adapt Filters (1)' are visible.



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).

Jurisdiction	License ID	Initial Issue Date	Renewal 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-Nonresident	Active

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

Example below shows the Certifications.

Producer ID	Institution (Facility Name)	Education Type	Education Status	Certification Start Date	Certification End Date	Graduation Date
	CSTRHQ	CentSource Medicare Product Certification	Passed	Sep 19, 2022	Dec 31, 2023	Sep 19, 2022
		FFM Certificate	Passed	Nov 1, 2022	Oct 31, 2023	Aug 22, 2022
		AHP Certificate	Passed	Aug 4, 2022	Dec 31, 2023	Aug 4, 2022
		FFM Certificate	Passed	Jan 1, 2022	Oct 31, 2022	Aug 31, 2021
		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.

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



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

File Name	Date Uploaded	File Size	View/Remove
No data found. Try adjusting the filter settings.			

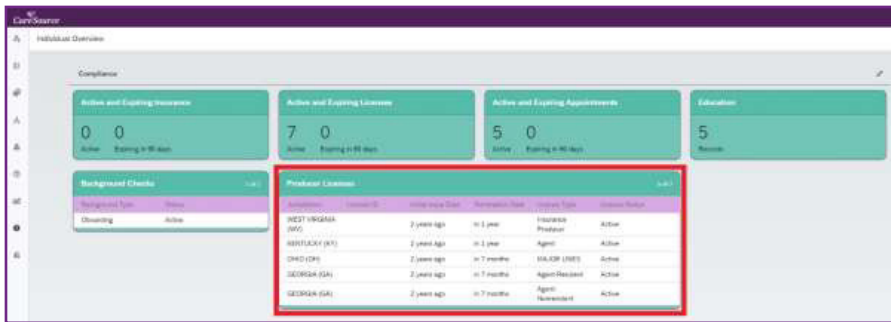


PRODUCER LICENSES

The Producer Licenses Card will list the Producer Licenses.

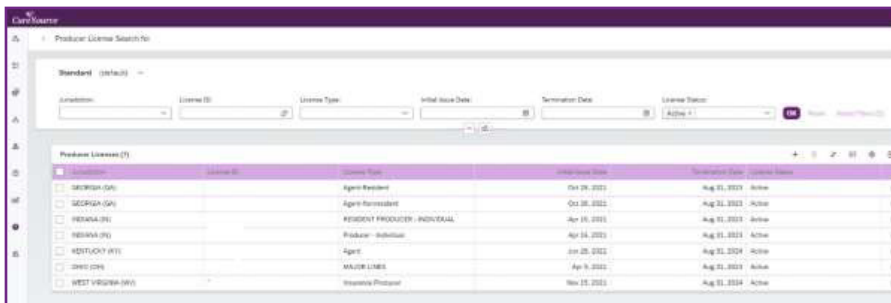
To access your Producer Licenses Details:

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



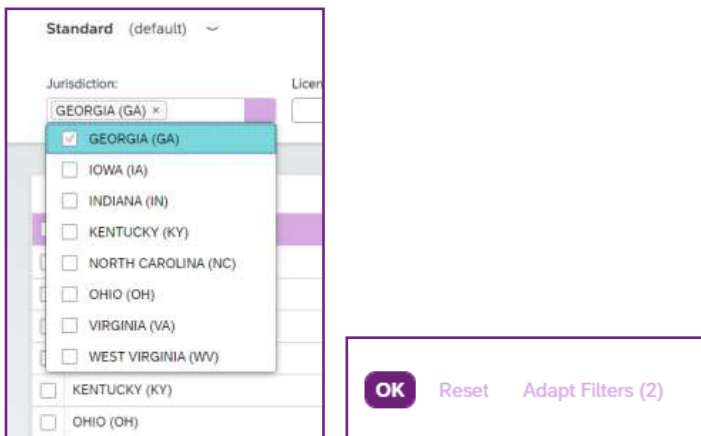
By clicking on the **Producer Licenses Card**, the system will allow you to view all licenses.

Example below shows the complete list and license detail.



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.





Example below shows results for Georgia licenses.

License ID	License Type	Initial Issue Date	Termination Date	License Status
342760	Agent Resident	Oct 28, 2021	Aug 31, 2023	Active
342761	Agent Resident	Oct 28, 2021	Aug 31, 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 - Agent-Resident - GEORGIA

License Name: Agent Resident | License ID: [REDACTED] | License Type: Agent Resident | License Status: Active

State: GEORGIA | System Status: Active

Detail information

License ID	Agent Resident	License Status	Active
State	GEORGIA	License Type	Agent Resident
Effective Date	Oct 28, 2021	Expiry Date	Aug 31, 2023
State Issued	Oct 28, 2021	Non Resident	No
Date Requested		License Request Code	
		Next Renewal Request Date	

Comments: [REDACTED]

Notes

No data found. Try adjusting the filter settings.

My Tasks

No data found. Try adjusting the filter settings.

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.

Files (1)

File Name	File Type	File Size	Attachment
LIC.pdf	Oct 28, 2021	72,309	[Download Icon]

License Details

No data found. Try adjusting the filter settings.

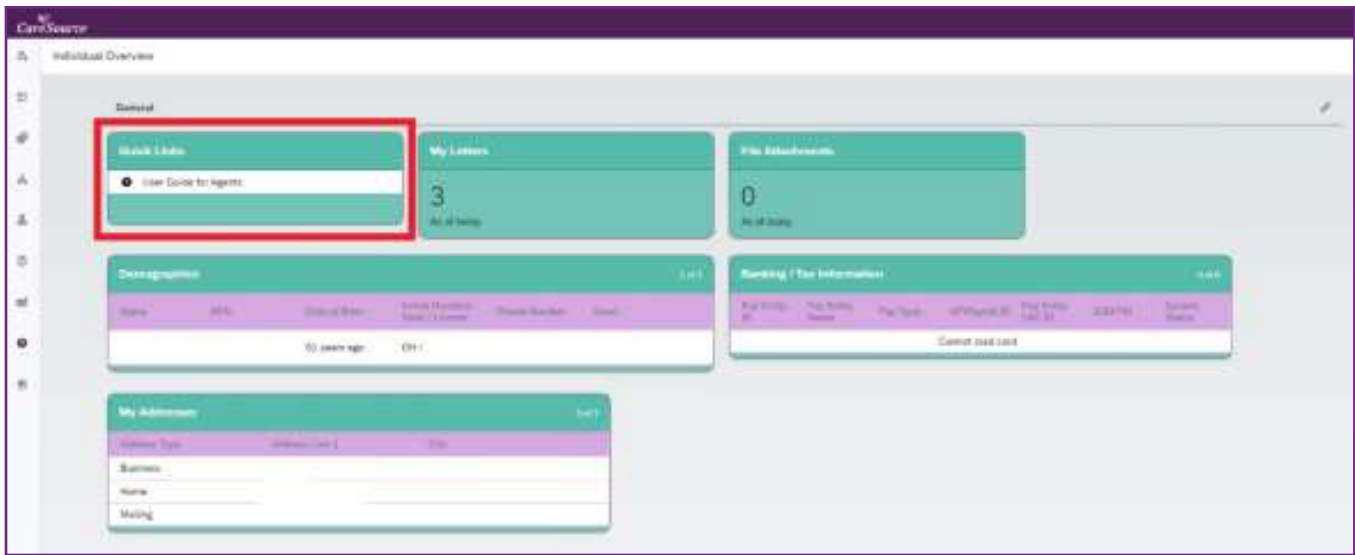


QUICK LINKS

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.

- Introduction
 - Getting Started**
 - Audience
 - Technical Specifications
 - Terminology in the User Interface
 - Portal Navigation
 - My Commission Statements
 - My Payee Hierarchy
 - My Reporting Hierarchy
 - Individual Overview Page
 - > Book of Business
 - > Commission
 - > Compliance
 - > General
 - > Performance
 - > Tasks
 - > Changing Overview Page Layouts
 - Managing Views
 - > Accessing Search Screens
 - Providing Feedback

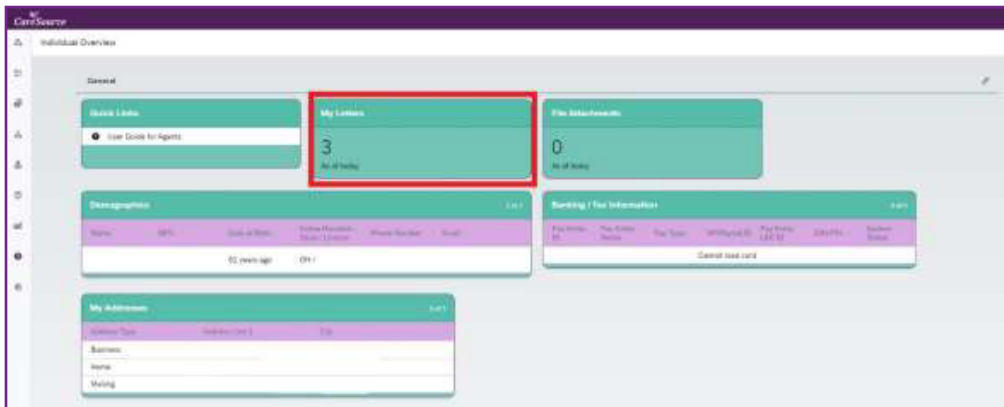


MY LETTERS

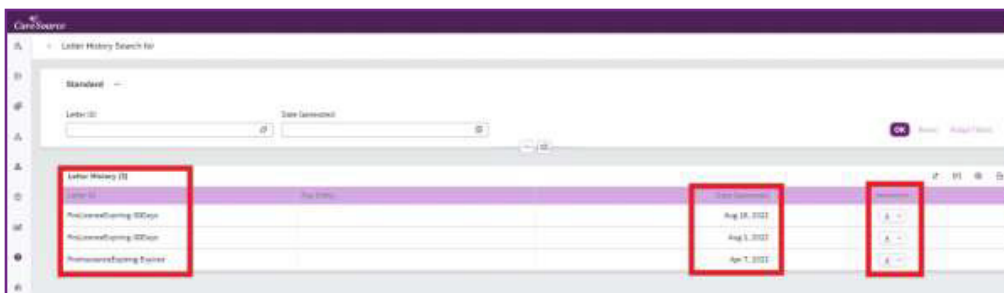
The My Letters Card will house all letters sent to the agent.

To access your My Letters Details:

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



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



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.



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.

The screenshot shows the CareSource Individual Overview page. The 'Demographics' card is highlighted with a red border. It contains the following information:

Name	NPN	Date of Birth	Active Resident State / License	Phone Number	Email
		62 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.

The screenshot shows the CareSource Demographics Detail for page. The 'Edit' button is highlighted with a red border. The page displays the following information:

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 'Individual Overview' page in CoreSource. The 'My Addresses' card is highlighted with a red border. It contains a table with the following data:

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 'Address Detail' page for a 'Business' address. The 'Edit' button is highlighted with a red box. The page displays the following information:

Address - Business

Address Type: Business

Full Name: [Redacted]

Detail Information

Use This Address For: [Dropdown]

Mailing Address

Address Type: Business

City: [Redacted]

Full Name: [Redacted]

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

Name Suffix: [Redacted] Attention Of: [Redacted] Address Line 1: [Redacted]

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

Address Line 3: [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]

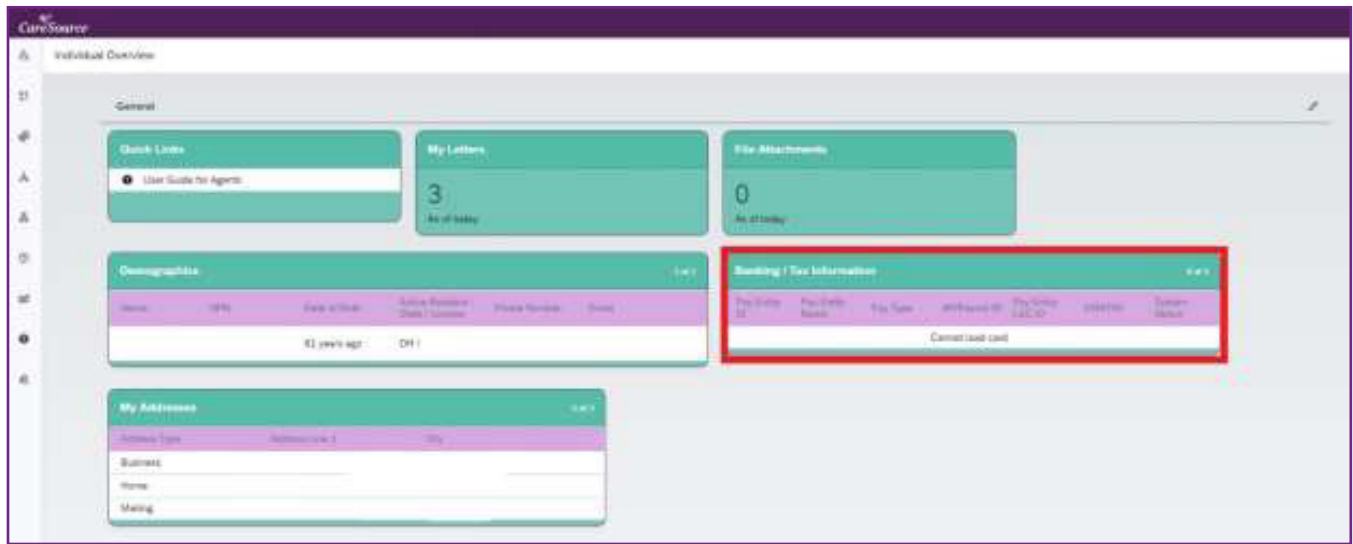


BANKING/TAX INFORMATION

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.



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.

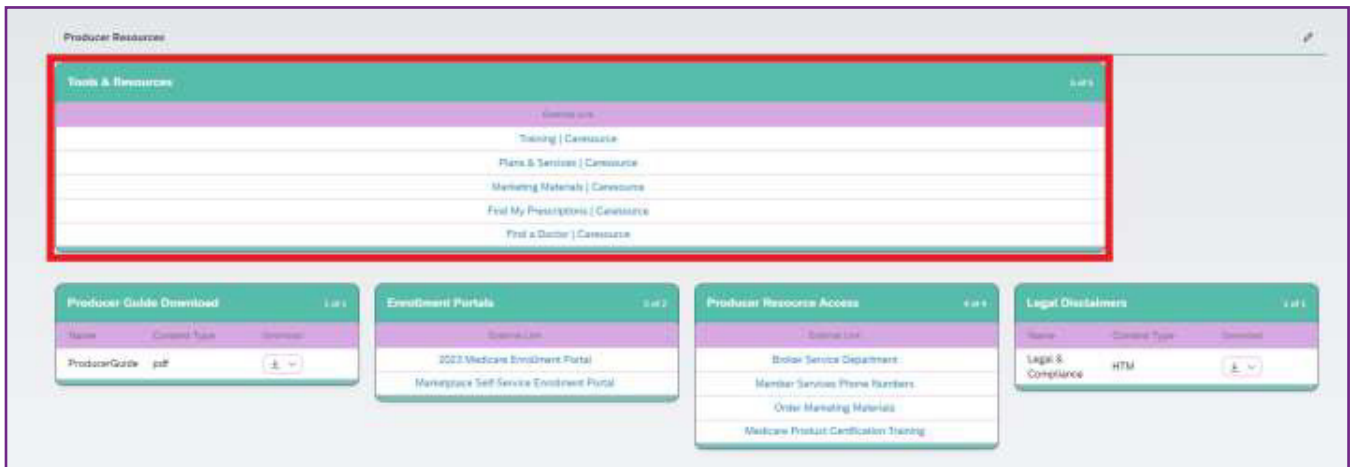


TOOLS & RESOURCES

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

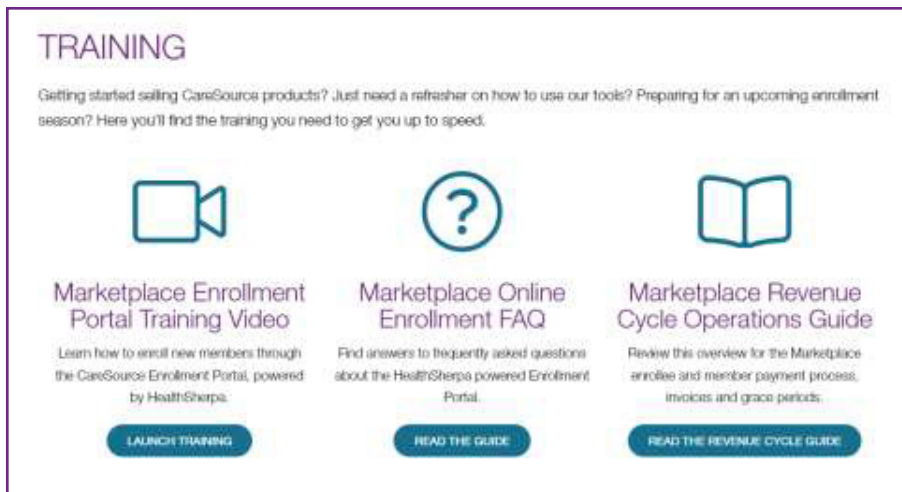
To access your Tools & Resources Details:

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



Examples:

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





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.

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.



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

Tools & Resources

FIND MY PRESCRIPTIONS

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

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 be 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
PRODUCER PORTAL GUIDE	24
AGENT AND BROKER COMPENSATION DISCLOSURE	26

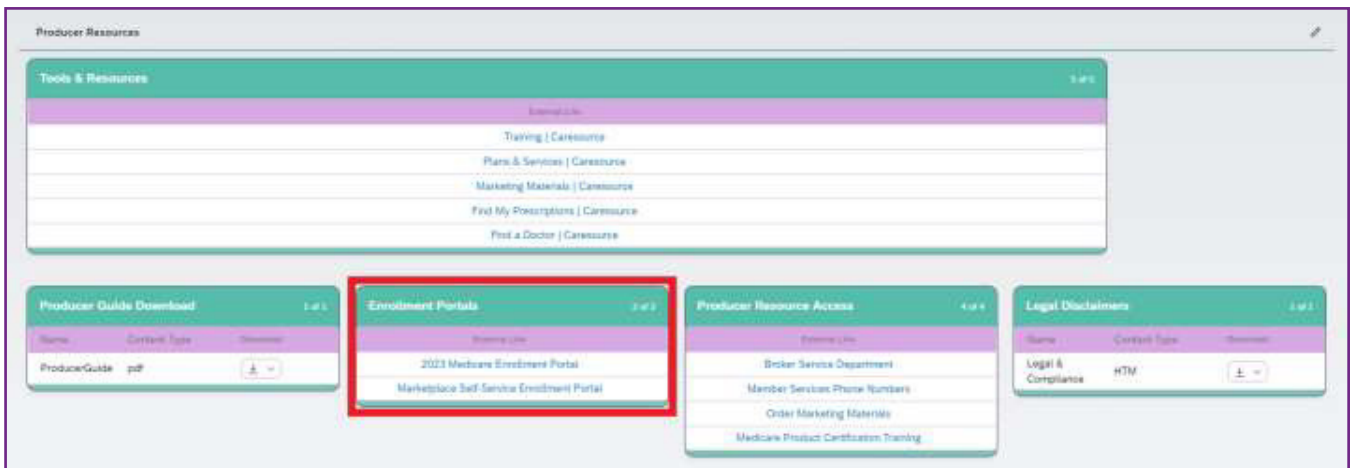


ENROLLMENT PORTALS

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

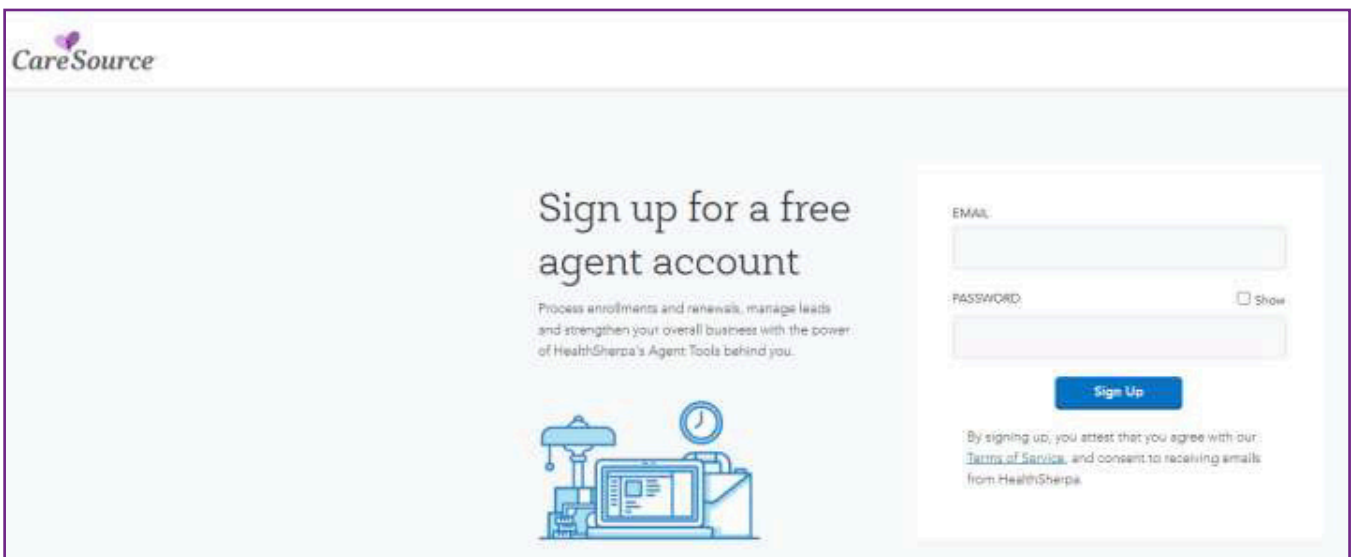
To access your Enrollment Portals links:

- 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 dashboard titled "Producers Resources". It features several cards:

- Tools & Resources:** A list of links including Training | CareSource, Plans & Services | CareSource, Marketing Materials | CareSource, Find My Prescriptions | CareSource, and Find a Doctor | CareSource.
- Producer Guide Download:** A card with a table containing a "ProducerGuide.pdf" download link.
- Enrollment Portals:** A card with links for "2023 Medicare Enrollment Portal" and "Marketplace Self-Service Enrollment Portal".
- Producers Resource Access:** A card highlighted with a red border, containing links for "Broker Service Department", "Member Services Phone Numbers", "Order Marketing Materials", and "Medicare Product Certification Training".
- Legal Disclaimers:** A card with a table containing a "Legal & Compliance" HTML document download link.

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 navigation and content:

- Navigation:** CareSource logo, location pin icon, and menu items for Plans, Members, Providers, Producers, and About Us.
- Breadcrumbs:** CareSource / Producers / Broker Service Department.
- Banner:** "WANT TO SELL CARESOURCE? SELECT YOUR GENERAL AGENCY!" with a "LEARN MORE" button.
- Section:** "BROKER SERVICE DEPARTMENT".
- QUICK LINKS:** A box with links for "Apply To Become A Broker", "Marketing Materials", and "Producers Training Materials".
- Select a State:** A section with five state icons: Georgia, Indiana, Kentucky, Ohio, and West Virginia.
- Text:** "CareSource has a dedicated Broker Services department to support our contracted individual producers throughout the agent lifecycle. We facilitate the CareSource/producer contracting process and verify credentials in order to submit a state appointment and make sure you're ready to sell. We also manage the payment of commissions and investigate situations of non-payment."



Example below shows the Member Services Phone Numbers link.

The screenshot shows a website page titled "Member Services Phone Numbers". The page includes a navigation menu at the top with links for Plans, Members, Providers, Products, and About Us. On the left side, there are sections for "Member Overview", "TOOLS & RESOURCES", "CONTACT US", and "QUICK LINKS" with a link icon. The main content area lists phone numbers and hours for various services:

- OHIO**
 - Medicaid:** 1-800-488-0134 (TTY: 1-800-750-0750 or 711)
Hours: 7 a.m. to 7 p.m., Monday – Friday
 - Medicare Advantage:** 1-844-867-2827 (TTY: 1-800-750-0750 or 711)
Hours: 8 a.m. to 8 p.m. EST, seven days a week from October 1 to March 31, and Monday – Friday the rest of the year
 - MA – Dual Special Needs:** 1-852-230-0320 (TTY: 1-800-750-0750 or 711)
Hours: 8 a.m. to 6 p.m. EST, seven days a week from October 1 to March 31, and Monday through Friday the rest of the year
 - Marketplace:** 1-800-479-8020 (TTY: 1-800-750-0750 or 711)
Hours: 7 a.m. to 7 p.m., Monday – Friday
 - MyCare:** 1-855-475-3163 (TTY: 1-800-750-0750 or 711)
Hours: 8 a.m. to 6 p.m., Monday – Friday
 - Community Transition Program (CTP):** 1-844-539-1728 (TTY: 1-800-750-0750 or 711)
Hours: 8 a.m. to 5 p.m., Monday – Friday
- KENTUCKY**
 - Marketplace:** 1-888-815-6448 (TTY: 1-800-648-8266 or 711)
Hours: 7 a.m. to 7 p.m., Monday – Friday

Example below shows the Order Marketing Materials link.

The screenshot shows the CareSource login page. At the top is the CareSource logo. Below it is a "Sign In" section with input fields for "User Id" and "Password", and a "Login" button. A note below the login fields states: "For password resets, email cs.pwreset@baesman.com. You must be an actively contracted and appointed agent with CareSource in order to access our sales materials. To become contracted with CareSource visit our site at <https://www.caresource.com/producers/get-contracted/>".

Example below shows the Medicare Product Certification Training link.

The screenshot shows a login page for Medicare Product Certification Training. It features a purple heart logo in the top left. The text reads: "Please enter your username & password to access your online learning:". There are two input fields: one for the username and one for the password (masked with dots). Below the password field are two checkboxes: "Show Password" and "Remember me on this computer". A "Login" button is positioned below the checkboxes. At the bottom, there is a link that says "I've forgotten my username/password".

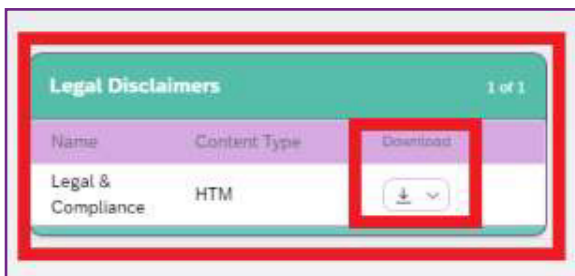


LEGAL DISCLAIMERS

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.



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

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