

# Miramar:Agent Agent User Guide

Rev. 7/2020

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## I. INTRODUCTION

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*This document is housed on the Miramar:Agent Knowledge Base for Agents (<https://miramar-agent.com/KnowledgeBase/Article?kb=5>).*

Miramar:Agent is a web-based, multi-tenant software solution. Information in this User Guide covers all agent-facing functions and features of Miramar:Agent. Your available features and services may vary.

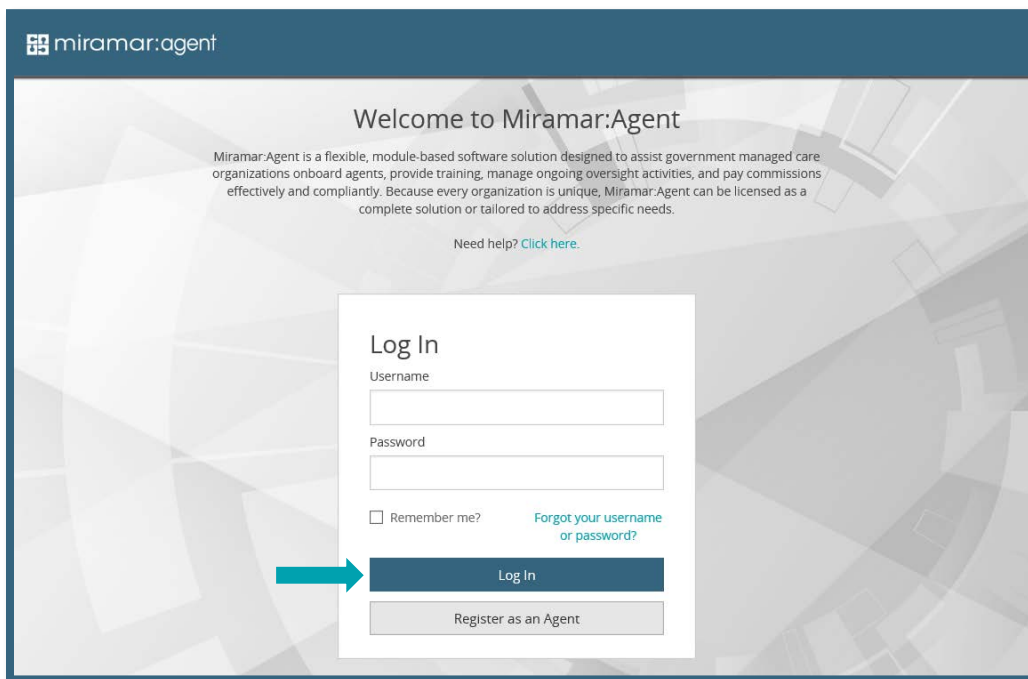
## II. GETTING STARTED

### ACCESSING THE SYSTEM

As a Miramar:Agent user, you will only ever need one set of login credentials from which you can access plans you have been granted access to in the system. To log in to your account, go to [www.miramar-agent.com](http://www.miramar-agent.com) and enter your username and password on the main landing screen. Click **Log In**.



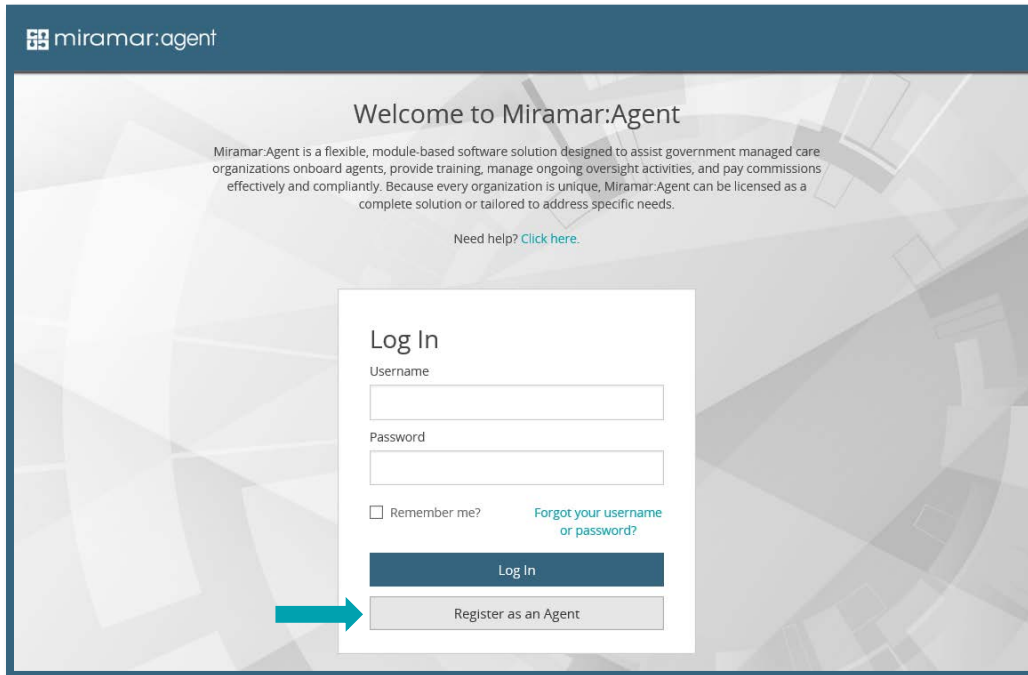
**TEAM SUPPORT:** Logins are NOT carrier/plan or program specific. Returning users will use their existing username and password to access any additional programs they need to complete.




The screenshot shows the Miramar:Agent login interface. At the top left is the 'miramar:agent' logo. The main heading is 'Welcome to Miramar:Agent'. Below this is a paragraph of text: 'Miramar:Agent is a flexible, module-based software solution designed to assist government managed care organizations onboard agents, provide training, manage ongoing oversight activities, and pay commissions effectively and compliantly. Because every organization is unique, Miramar:Agent can be licensed as a complete solution or tailored to address specific needs.' Below the text is a link: 'Need help? [Click here.](#)'. The central focus is a 'Log In' form with two input fields for 'Username' and 'Password'. Below these fields is a checkbox labeled 'Remember me?' and a link 'Forgot your username or password?'. At the bottom of the form are two buttons: a dark blue 'Log In' button and a grey 'Register as an Agent' button. A red arrow points to the 'Log In' button.

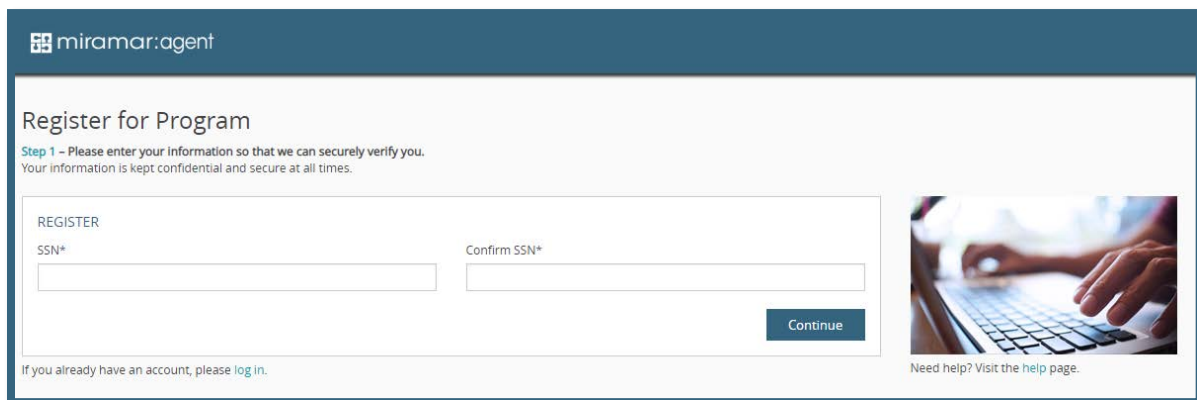
## How do I register as a new agent?

First-time users will need to register as an agent in the system. Click on **Register as an Agent**.



First, you will be asked to enter your Social Security Number (SSN). SSN is the unique identifier for users in the system. This step will check all existing users to verify the SSN entered does not already exist in a profile.

 **IMPORTANT NOTE:** Failure to use a valid SSN could result in the inability to successfully complete a program, as the SSN is used for certain actions such as background checks.



Agents who were given a Registration Code by their carrier or upline will enter the code immediately following the SSN validation. If you are not asked to enter a Registration Code, you were pre-enrolled into a program.



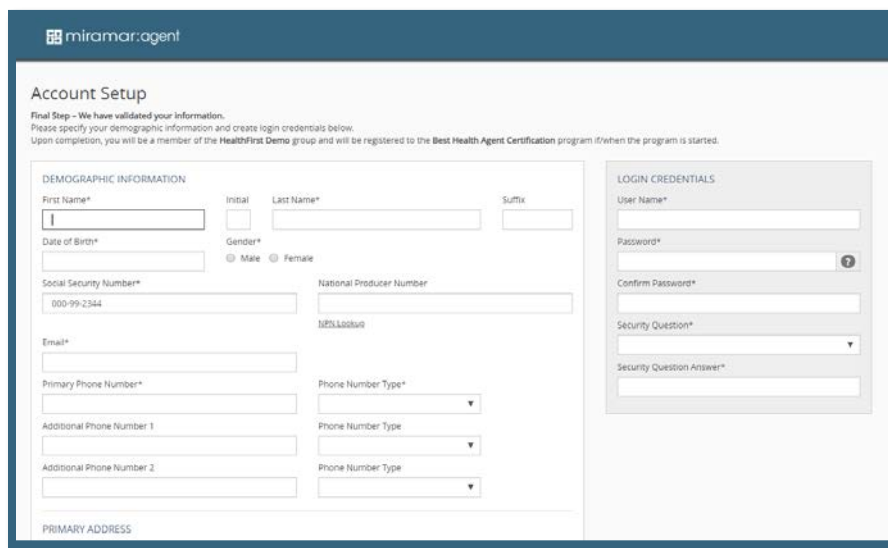
Enter your demographic information, a username, password, and security question and answer. All fields marked with an asterisk (\*) are required. Click **Complete Registration** once you have completed the form. Once you have completed registration, you will need to verify your email address prior to logging in.



**IMPORTANT NOTE:** For security purposes, your SSN may not be used as your username.

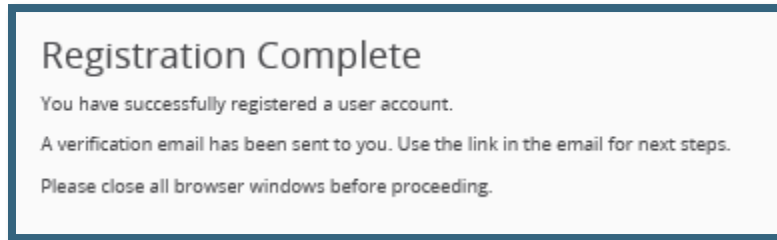



**HINT:** Passwords are required to contain a minimum of eight characters with at least one uppercase letter, one lowercase letter, one number, and one special character. Example: Password1#




### How do I verify my email address?

New users, and existing users who have not already done so, will need to verify their email address. Upon completing registration or logging in for the first time since email verification has been required, you will see the following message.

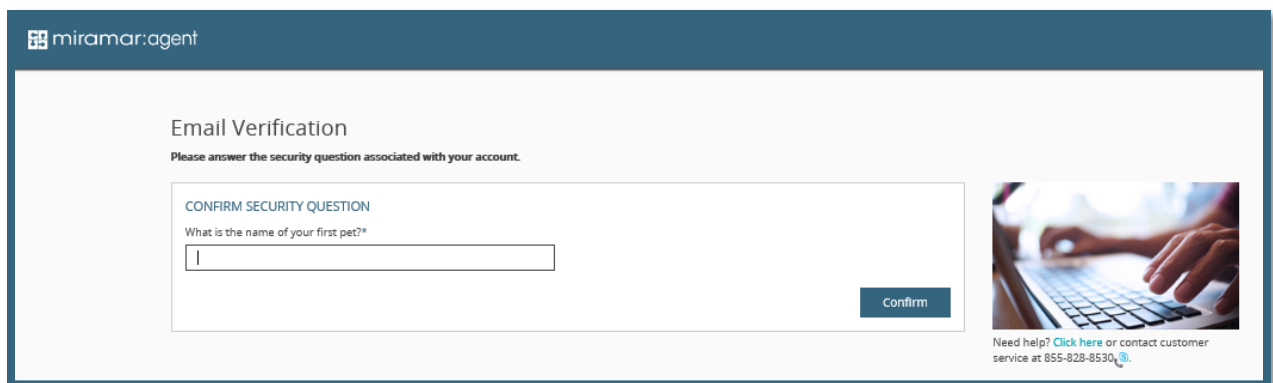


 **IMPORTANT:** Be sure to close all of your browser windows prior to opening the verification email. If you do not close your browser windows, you may receive an error message.

You will receive an email with a link to verify your email address. If you do not receive the email, please be sure to check your spam or junk folders.

 **IMPORTANT:** The link in the email is a one-time URL and will expire after 24 hours of receipt. If you received an error message after initially clicking the link, you will need to log in again to initiate a new verification email.

After you click the one-time URL, you will be taken to the following page. Confirm your security question and click **Continue**.

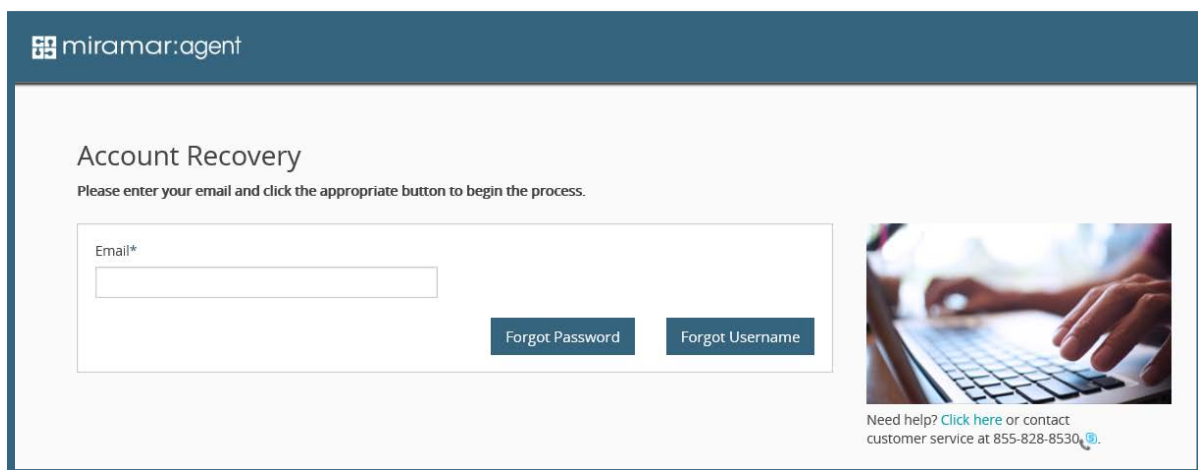
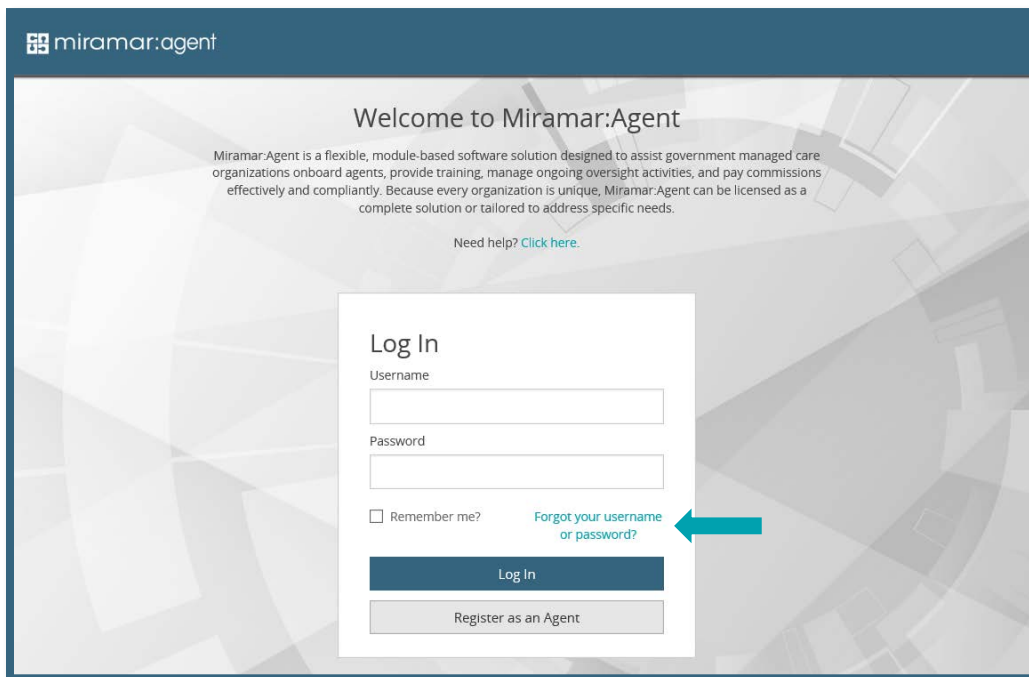


Once verified, click the **log in** link and you will be able to log in using your credentials on the Miramar:Agent homepage.


### How do I retrieve my username or password?

If you've forgotten your username or password, you can retrieve them directly to your email after completing the one-time email verification process. If you have not yet verified your email address, continue to follow the instructions on the next page.

Click on **Forgot your username or password?** and enter your email address when prompted. Click **Forgot Password** or **Forgot Username**, depending on which you need to recover.

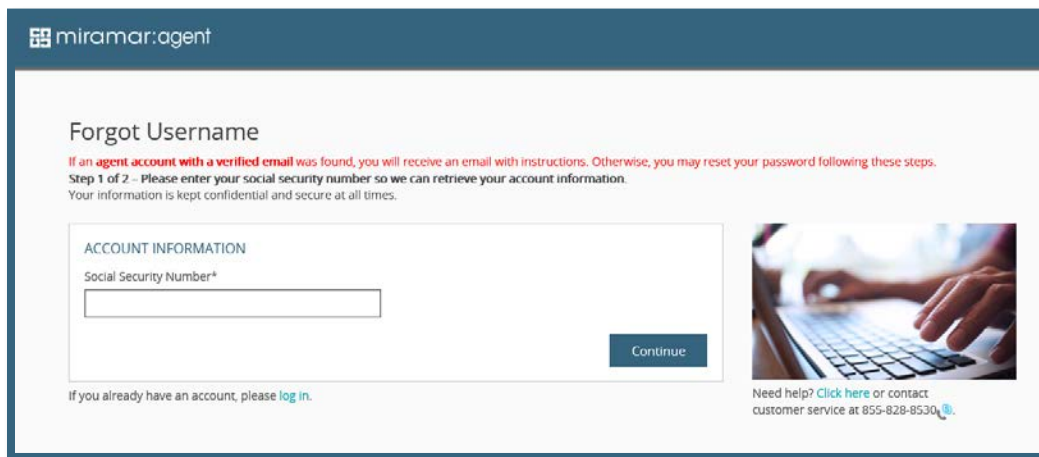





 **IMPORTANT:** If you have already verified your email address, you will receive an email with instructions for retrieving your password or username. Otherwise, follow the instructions as prompted. If you have forgotten your password, you will need to know your username in order to retrieve it.

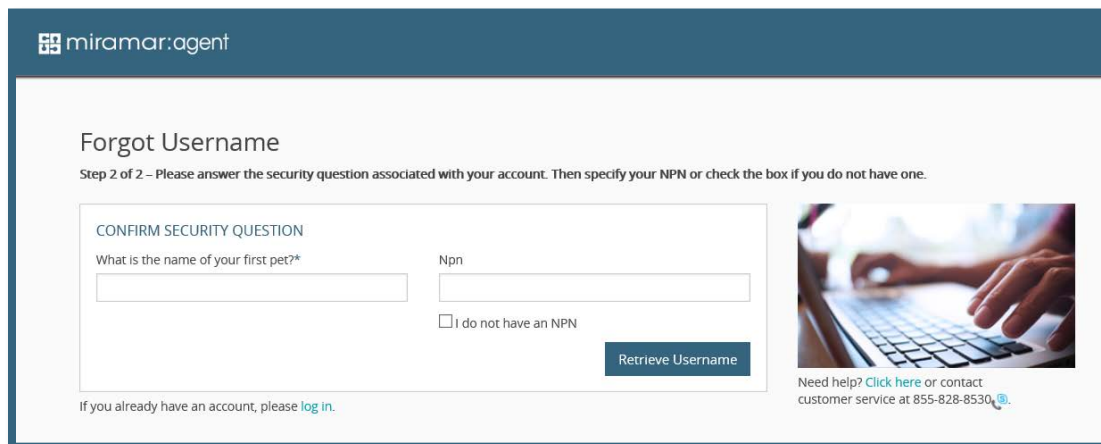
### Forgot Username

Enter your Social Security Number and click **Continue**.



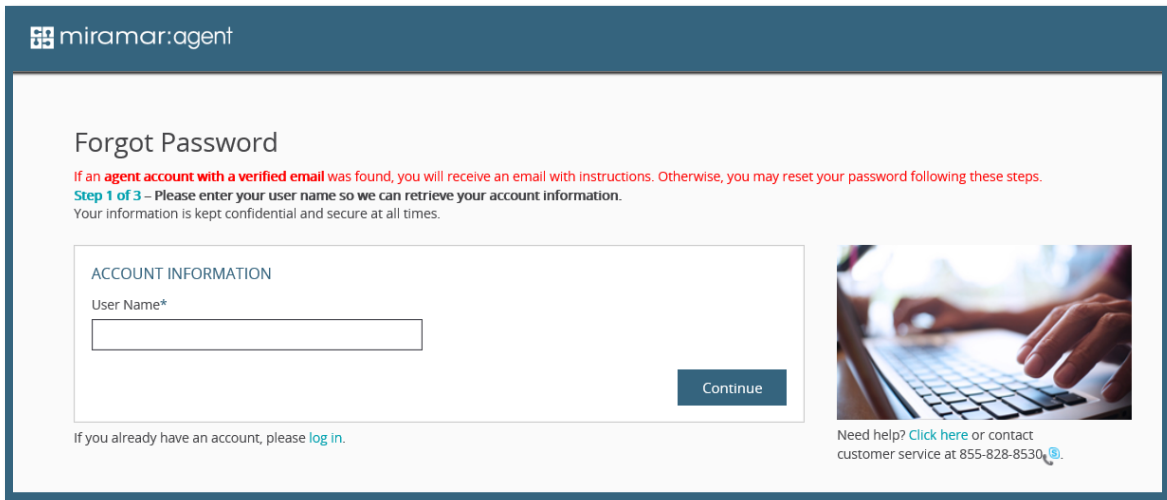
Answer the security question associated with your account and your NPN. If you do not have an NPN, check the box accordingly. Click **Retrieve Username**. Your username will show on the following page.

 **QUICK TIP:** If you have not yet verified your email address and cannot remember the answer to your security question, you will need to contact the Helpdesk to answer additional questions to verify your identity and update your password. To contact the Helpdesk, create a ticket by clicking [here](#) or call using the plan-specific phone number provided by your plan representative.



### Forgot Password

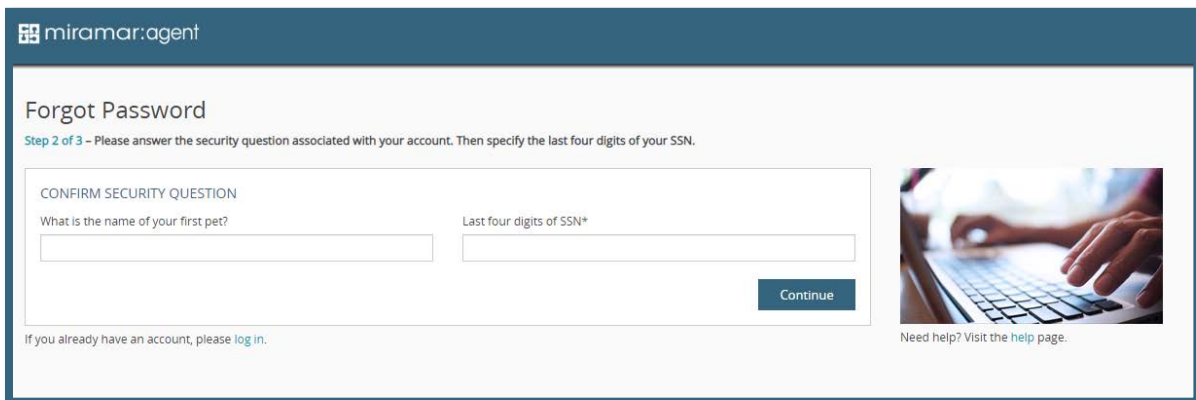
Enter your username and click **Continue**. If you do not know what your username is, follow the instructions in the section above.




Confirm your account by answering your security question and entering the last four digits of your Social Security Number. Click **Continue**.

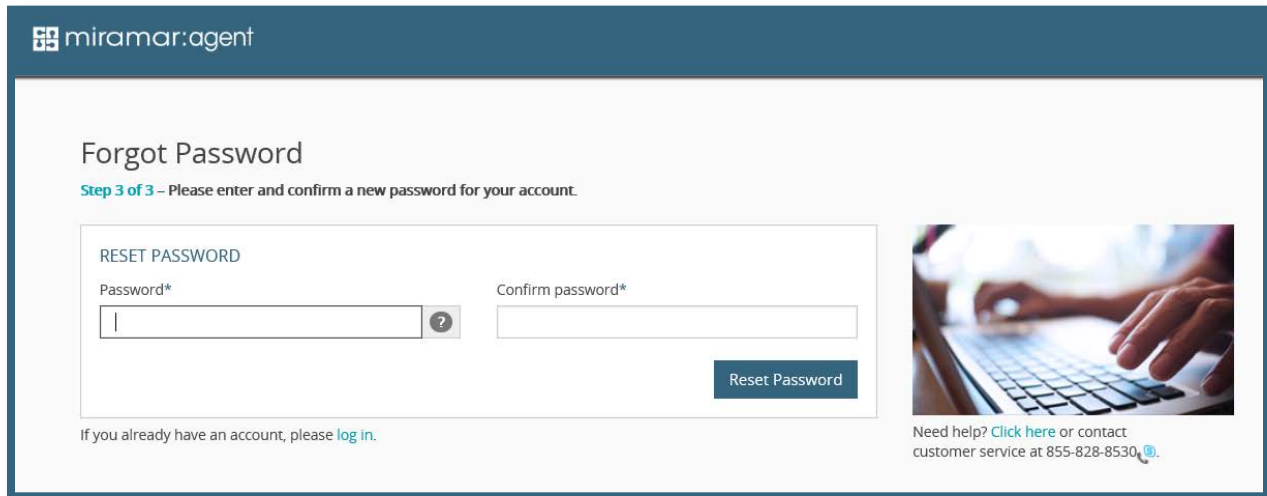


**QUICK TIP:** If you have not yet verified your email address and cannot remember the answer to your security question, you will need to contact the Helpdesk to answer additional questions to verify your identity and update your password. To contact the Helpdesk, create a ticket by clicking [here](#) or call using the plan-specific phone number provided by your plan representative.

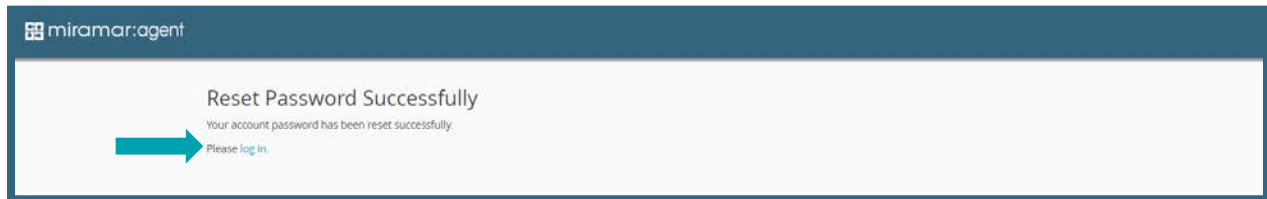


Enter a new password and confirm by re-entering, then click **Reset Password**.

 **NOTE:** Passwords are required to contain a minimum of eight characters with at least one uppercase letter, one lowercase letter, one number, and one special character. Example: Password1#



Once you have successfully reset your password, click **log in** to return to the login page.







## OPTIMIZING YOUR EXPERIENCE

In order to optimize your certification experience in Miramar:Agent, please ensure you are using one of our supported browsers and have enabled pop-ups in your browser settings.

### Supported Browsers




Compatibility for Miramar:Agent is tested with the following browsers:

-  Google Chrome
-  Internet Explorer 11
-  Mozilla Firefox
-  Microsoft Edge

Our team uses, and we recommend, Internet Explorer 11. It is important you have enabled pop-ups before you access Miramar:Agent.



**QUICK TIP:** Restrictive security software can interfere with the ability to communicate training results to the learning management system from your browser. Click [here](#) for more information about what sites to set as secure.

-  [https://\\*.teamsupport.com](https://*.teamsupport.com)
-  [https://\\*.miramar-agent.com](https://*.miramar-agent.com)
-  <https://lms.gormanhealthgroup.com>

### Enabling Pop-Ups





It is important you have enabled pop-ups before you access Miramar:Agent, as trainings will pop up in a second tab or window.



**TEAM SUPPORT:** Click [here](#) for more information on how to enable pop-ups in FireFox, Google Chrome, and Internet Explorer.

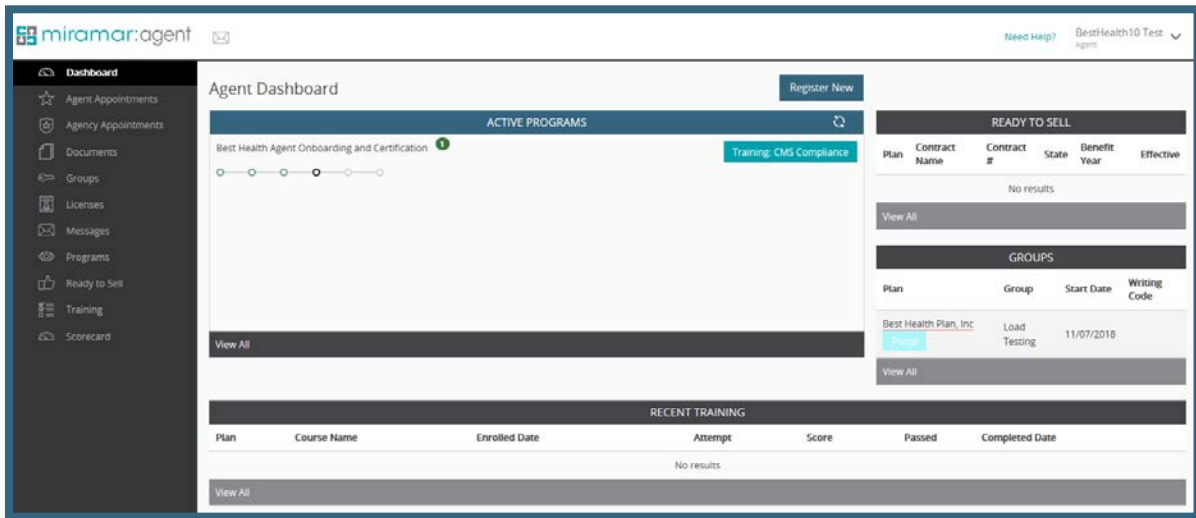
### III. AGENT DASHBOARD

The Agent Dashboard is the hub of Miramar:Agent while also providing a snapshot of your current activity in the system. On your dashboard, you will see widgets for the following current information:

-  Active programs
-  Ready to sell information (current and previous benefit years)
-  Group affiliations
-  Recent training information

To view the full index of any of the dashboard widgets, click **View All**. From the individual index, you will be able to search and filter the available information.

From the dashboard, you can action any active program steps, edit your profile information, and access any of the tabs from your left side navigation menu.

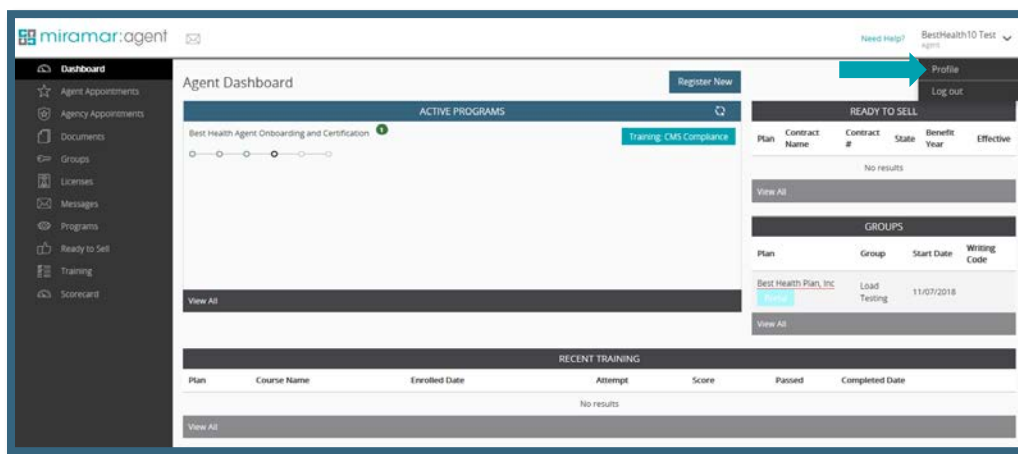


## PROFILE MANAGEMENT

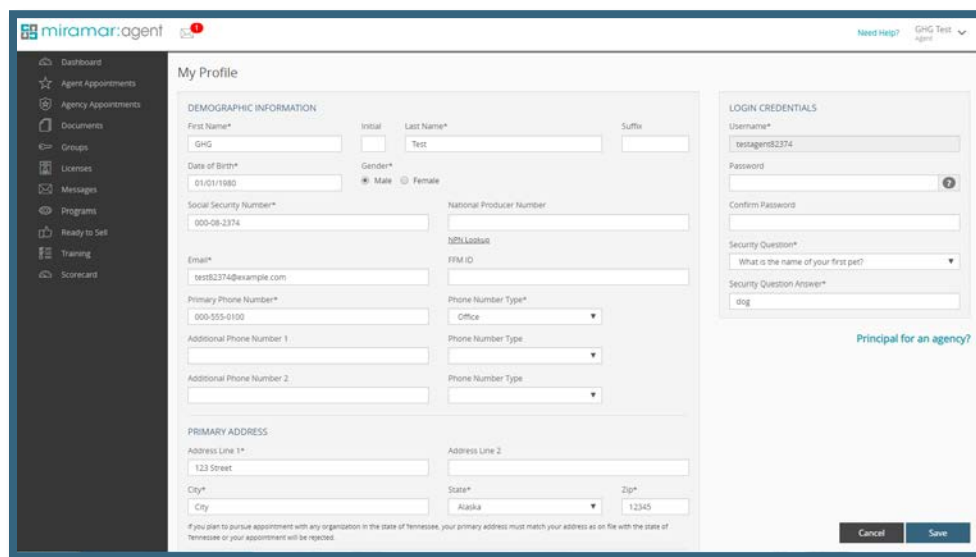
### How do I update my profile information?

You can update your profile demographic information, change your account password, or change your security question and answer at any point in time after completing registration.

To do so, move your cursor to the upper right corner of your screen and click the down arrow that appears to the right of your name. A drop-down menu will be displayed. Select **Profile**.

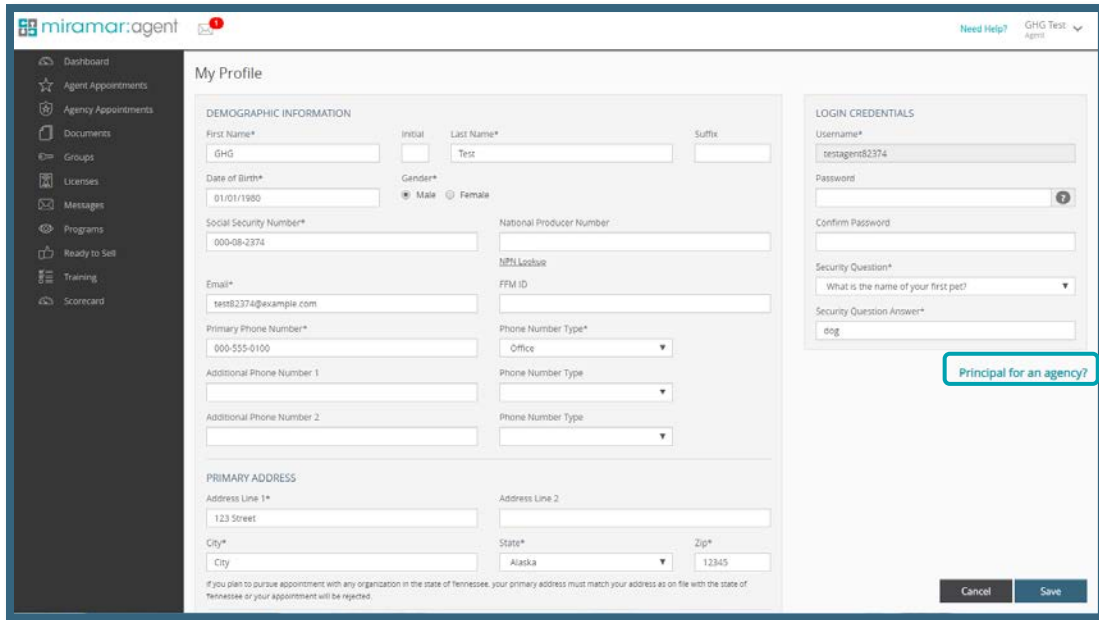


Once you've made the desired changes to your profile, be sure to click **Save** at the bottom of the screen before you leave the page.



## How do I register as the principal of an agency?

If you are an agency principal, you must register as an individual before you will be allowed to register as the principal of an agency. Once you have completed your individual profile, proceed to the *My Profile* page and click **Principal for an agency?**



The screenshot shows the 'My Profile' page with the following fields:

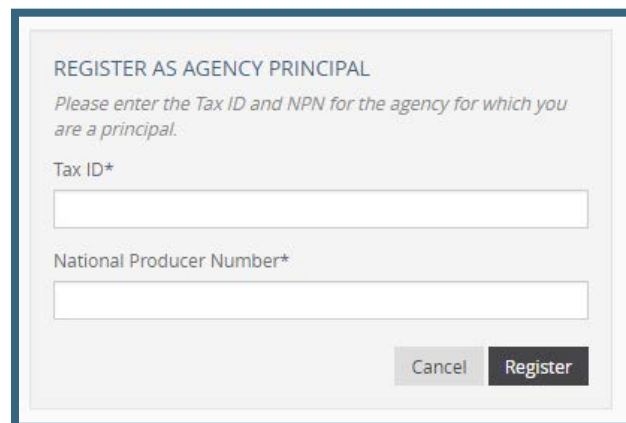
- DEMOGRAPHIC INFORMATION:** First Name\* (GHG), Initial ( ), Last Name\* (Test), Suffix ( ), Date of Birth\* (01/01/1980), Gender\* (Male/Female), Social Security Number\* (000-08-2374), National Producer Number, NPI License, FFM ID, Email\* (19892374@example.com), Primary Phone Number\* (000-555-0100), Additional Phone Number 1, Additional Phone Number 2, Phone Number Type\* (Office).
- LOGIN CREDENTIALS:** Username\* (testagent82374), Password, Confirm Password, Security Question\* (What is the name of your first pet?), Security Question Answer\* (dog).
- PRIMARY ADDRESS:** Address Line 1\* (123 Street), Address Line 2, City\* (City), State\* (Alaska), Zip\* (12345).

A red box highlights the 'Principal for an agency?' button in the bottom right corner.

Enter the required agency information (Tax ID and National Producer Number (NPN)). Click **Register**.



**IMPORTANT NOTE:** You must provide the *agency* NPN and *agency* Federal Employer Identification Number (FEIN). Both are validated during the initial license check. If they do not match the values provided by the National Producer Insurance Registry (NIPR), no data will be imported, and you will not be able to proceed in your program without intervention.



**REGISTER AS AGENCY PRINCIPAL**  
Please enter the Tax ID and NPN for the agency for which you are a principal.

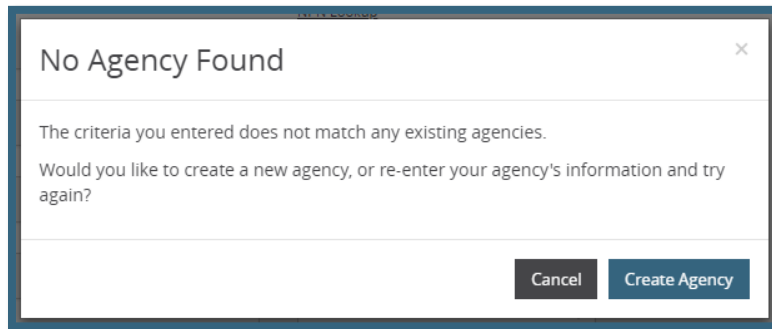
Tax ID\*

National Producer Number\*

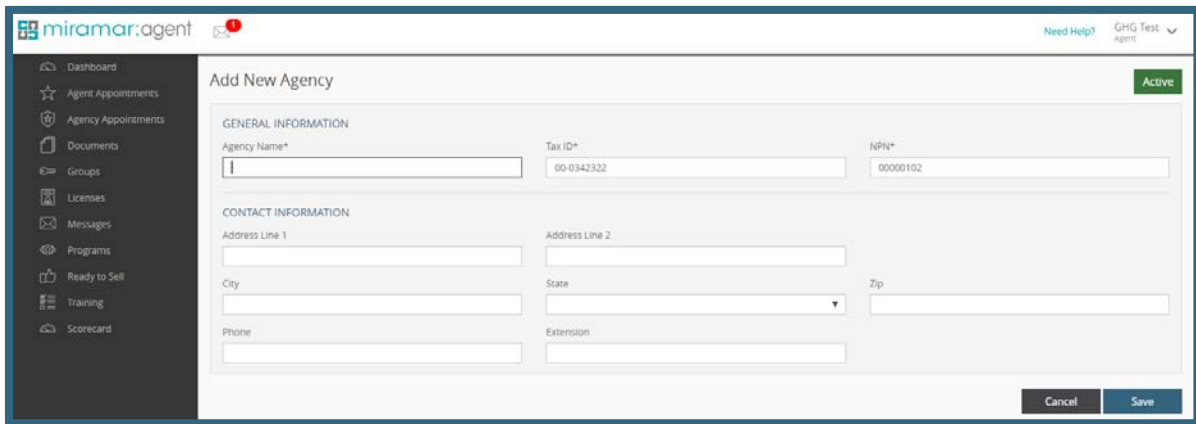
Cancel Register

### *New agency in Miramar:Agent*

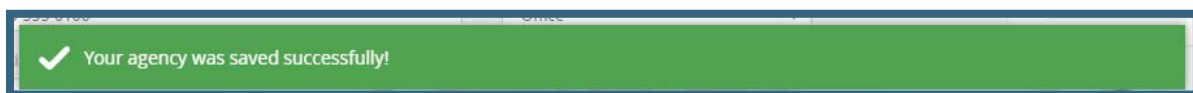
If the agency does not already exist in Miramar:Agent, a new agency will need to be created. Click **Create Agency**.



You will be prompted to fill in the name of the agency as well as option contact information. Click **Save** once you have completed the required fields.



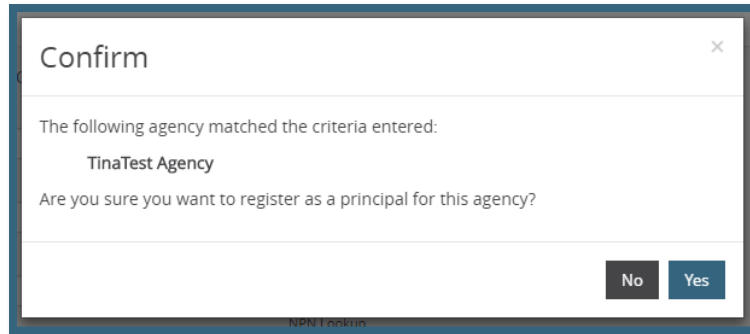
Once the agency has successfully saved, you will see the message below at the bottom of your screen.



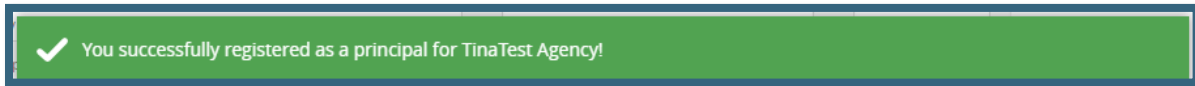


*Existing agency in Miramar:Agent*

If the agency has already been established in Miramar:Agent, you will see the confirmation pop-up below. Once you have confirmed the name showing on the form matches the agency you are attempting to register, click **Yes**.




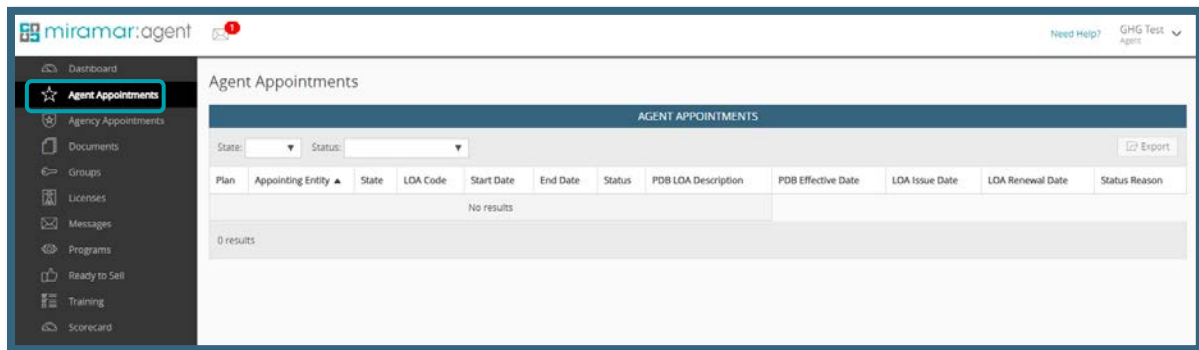
Once you have confirmed, you will see the message below at the bottom of your screen.



## AGENT APPOINTMENTS

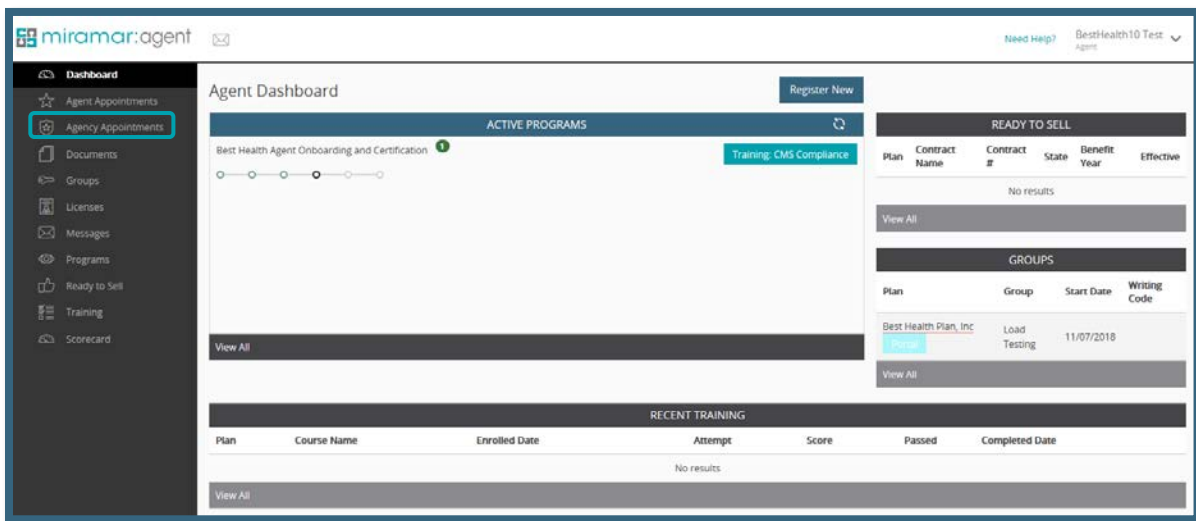
To view your agent appointments, click **Agent Appointments** in the Dashboard menu to the left of the screen. This will provide a snapshot of your appointments. To see all of your appointments, click **View All** in the gray bar below the displayed appointments.

 **IMPORTANT NOTE:** Appointment information is refreshed on a daily basis from NIPR for those plans that license appointment services.



## AGENCY APPOINTMENTS

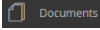
If you are registered as a principal of an agency and have gone through an agency program that included a license check step, you will be able to view any appointments associated with that agency. Click **Agency Appointments** in the Dashboard menu to the left of the screen to view your agency appointments.



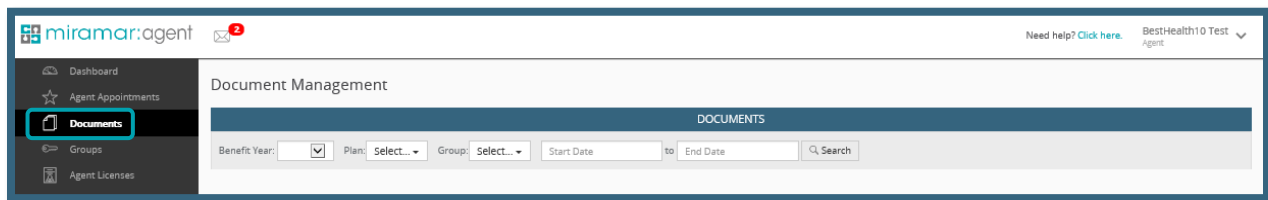
The screenshot shows the 'miramar:agent' dashboard. On the left is a navigation menu with 'Agency Appointments' highlighted. The main content area is titled 'Agent Dashboard' and includes a 'Register New' button. It is divided into three main sections:

- ACTIVE PROGRAMS:** Shows a progress bar for 'Best Health Agent Onboarding and Certification' with a '1' notification. A 'Training: CMS Compliance' button is visible.
- RECENT TRAINING:** A table with columns: Plan, Course Name, Enrolled Date, Attempt, Score, Passed, Completed Date. It currently shows 'No results'.
- READY TO SELL:** A table with columns: Plan, Contract Name, Contract #, State, Benefit Year, Effective. It also shows 'No results'.
- GROUPS:** A table with columns: Plan, Group, Start Date, Writing Code. It lists 'Best Health Plan, Inc' with 'Load Testing' and a start date of '11/07/2018'.


## DOCUMENTS

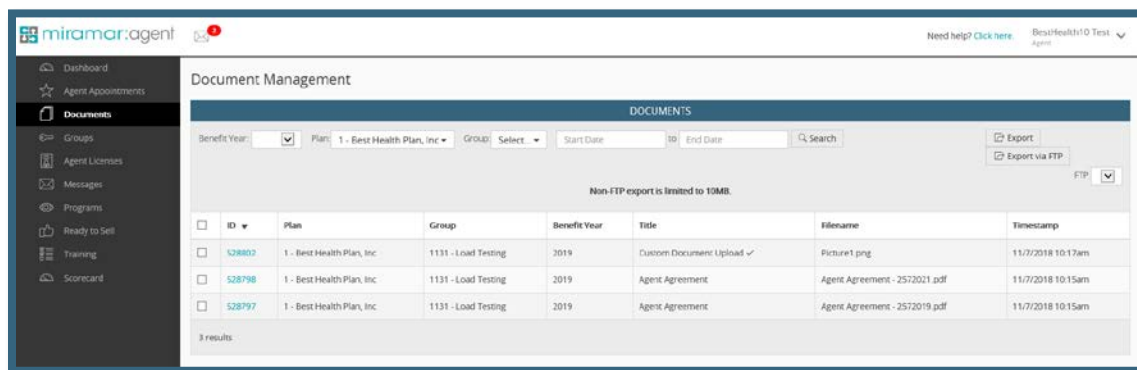
To view your uploaded and saved documents, click into  in the Dashboard menu to the left of the screen. Your documents can include training certificates, completed forms, uploaded E&O, or any other documents your plan saved during your program completion or requested to be uploaded.


Upon initially clicking into the Documents section, you will not see any documents available. To view all available documents, click **Search**. You can also search by various fields, including Benefit Year, Plan, Group, and date.



To view a document, click into the Document ID. You can also check off multiple documents to export at one time, by clicking **Export** in the top right corner.

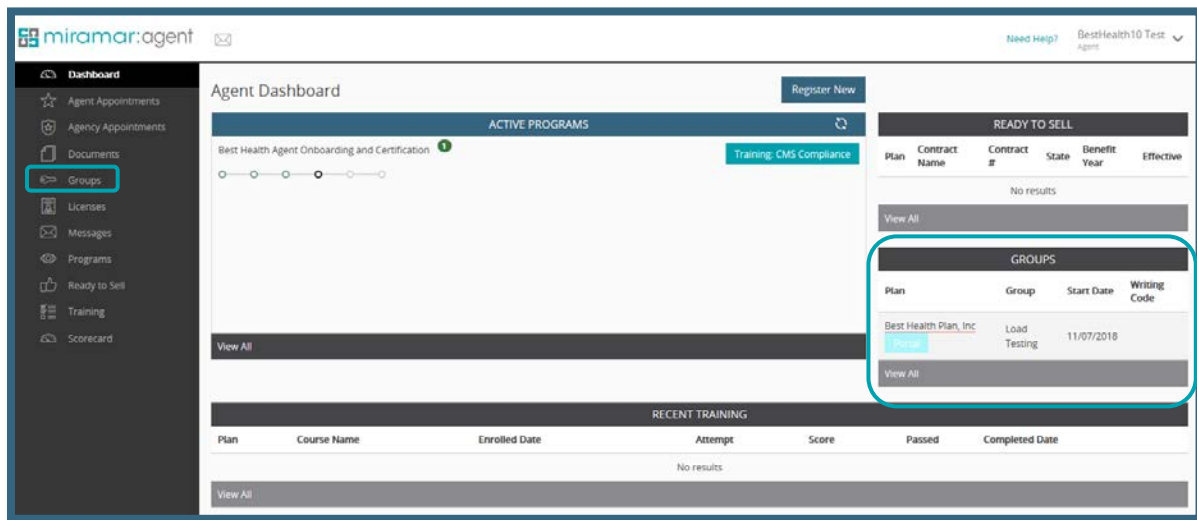
 **NOTE:** If a document requires review, you will see an icon next to the document title indicating if it is approved ✓, denied ✗, or not yet reviewed ... . You can hover over the icon to view the status description.



 **How do I upload a certificate or document?** For information on how to upload documents within a program, see the section on *Program Navigation*.

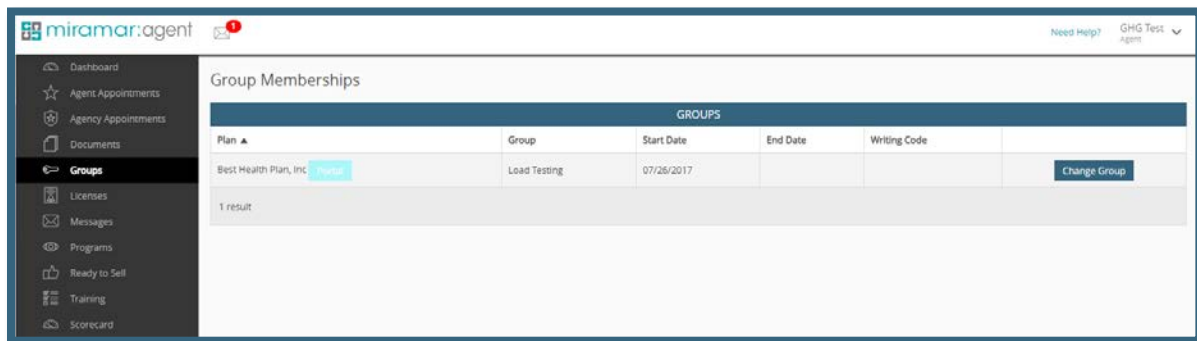
## GROUPS

To view a full history of your group affiliations for your plans, click **Groups** in the Dashboard menu to the left of the screen. The widget on your Dashboard will provide a snapshot of the groups with which you are currently associated.



The screenshot shows the 'Agent Dashboard' interface. On the left sidebar, the 'Groups' menu item is highlighted with a red box. The main content area includes sections for 'ACTIVE PROGRAMS', 'READY TO SELL', and 'RECENT TRAINING'. A 'GROUPS' widget is also visible, containing a table with the following data:

Plan	Group	Start Date	Writing Code
Best Health Plan, Inc	Load Testing	11/07/2018	



The screenshot shows the 'Group Memberships' page. It features a table with the following data:

Plan	Group	Start Date	End Date	Writing Code
Best Health Plan, Inc	Load Testing	07/26/2017		

A 'Change Group' button is visible next to the first row. Below the table, it indicates '1 result'.

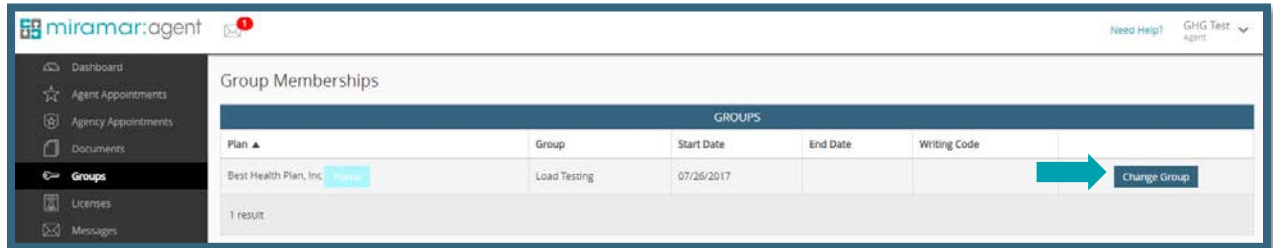
### How do I request a group change?

If the group listed for a plan is incorrect and you want to request a group change, you will need to get the Group Code from a plan administrator. Please reach out to your plan and not Miramar:Agent support as the plan has to approve this change.




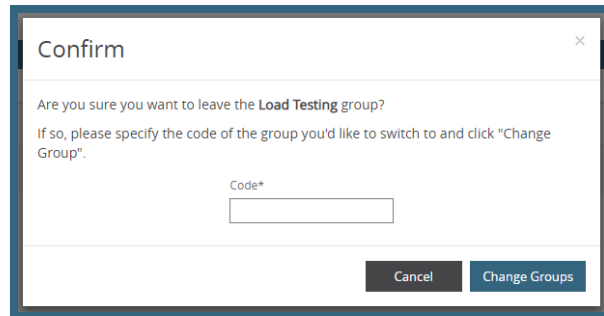
**NOTE:** The group code is NOT the same as a program registration PIN code. A PIN code is associated with a particular program and group, but a group code can be used to request a group change at any time and is static for that group.

Once you have the Group Code, click **Change Group** next to the group you wish to update.




Once you have clicked Change Group, a confirmation box will pop up on the screen, and you will be required to enter the Group Code. Click **Change Groups** to finalize the request. A green confirmation banner will appear at the bottom of your screen once you have completed the request.

 **IMPORTANT NOTE:** Your request will be sent to a Plan Administrator to process. The group change will only be finalized once the Plan Administrator has approved the request.



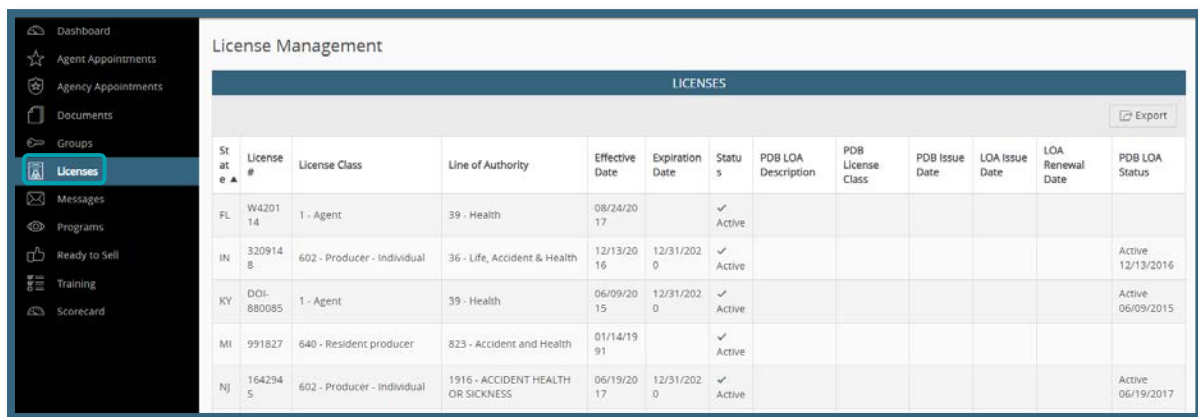
## LICENSES

To view your licenses, click **Agent Licenses** in the Dashboard menu to the left of the screen.

 **IMPORTANT NOTE:** License information is refreshed on a daily basis from NIPR for those plans that license appointment services.


You may utilize this index to monitor your licenses and track licenses with upcoming expiration dates. Licenses will show one of the following three statuses:

-  Active
-  Due Soon
-  Expired

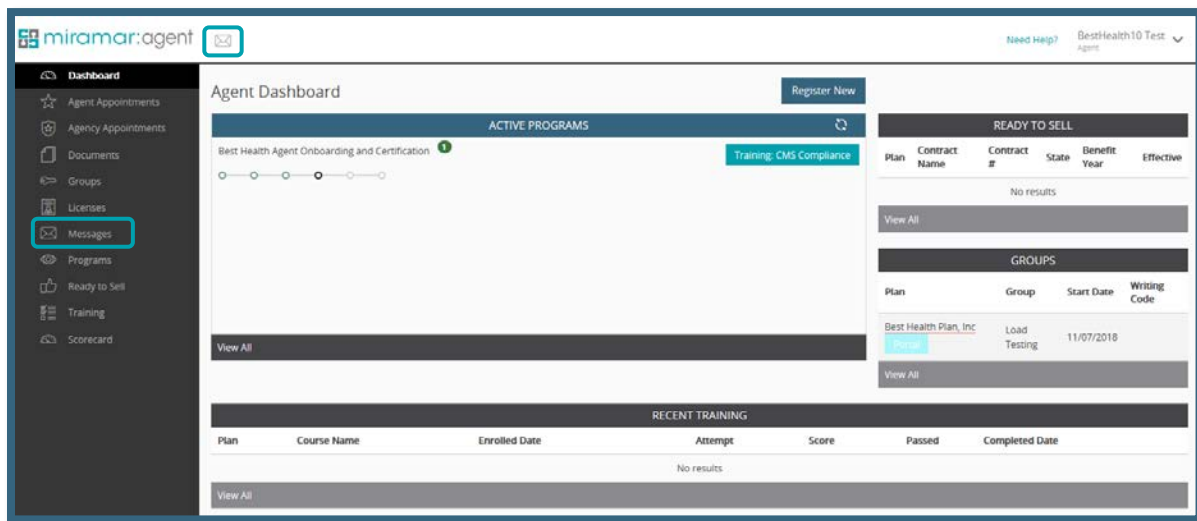


License Management												
LICENSES												
State	License #	License Class	Line of Authority	Effective Date	Expiration Date	Status	PDB LOA Description	PDB License Class	PDB Issue Date	LOA Issue Date	LOA Renewal Date	PDB LOA Status
FL	W420114	1 - Agent	39 - Health	08/24/2017		Active						
IN	3209148	602 - Producer - Individual	36 - Life, Accident & Health	12/13/2016	12/31/2020	Active						Active 12/13/2016
KY	DOI-880085	1 - Agent	39 - Health	06/09/2015	12/31/2020	Active						Active 06/09/2015
MI	991827	640 - Resident producer	823 - Accident and Health	01/14/1991		Active						
NJ	1642945	602 - Producer - Individual	1916 - ACCIDENT HEALTH OR SICKNESS	06/19/2017	12/31/2020	Active						Active 06/19/2017

## MESSAGES

The Messaging Center will be activated when you receive a message. To view your messages that have been sent to or from your plan, click into **Messages** on the Dashboard menu or into the *envelope icon*  at the top of the page.

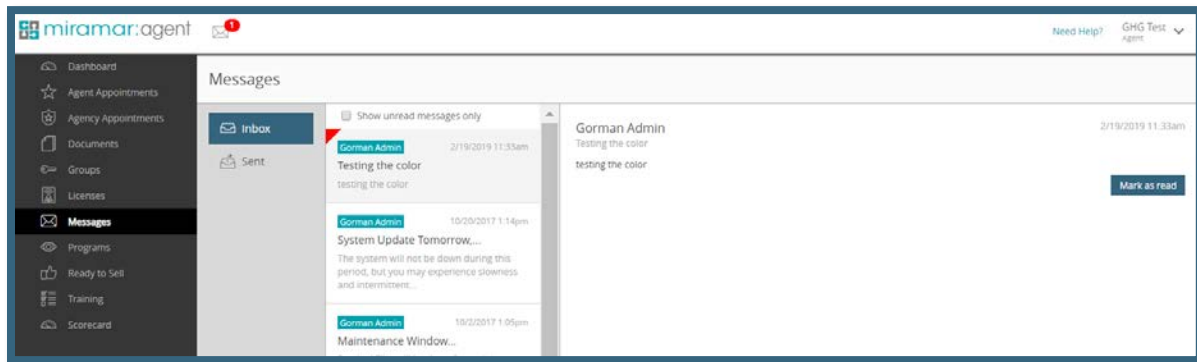
The envelope icon at the top left of the Agent Dashboard will display in a red bubble how many unread messages you have.



From your messaging center, you can mark messages as read by clicking **Mark as read**. You can also sort to only see your unread messages or view your sent messages.



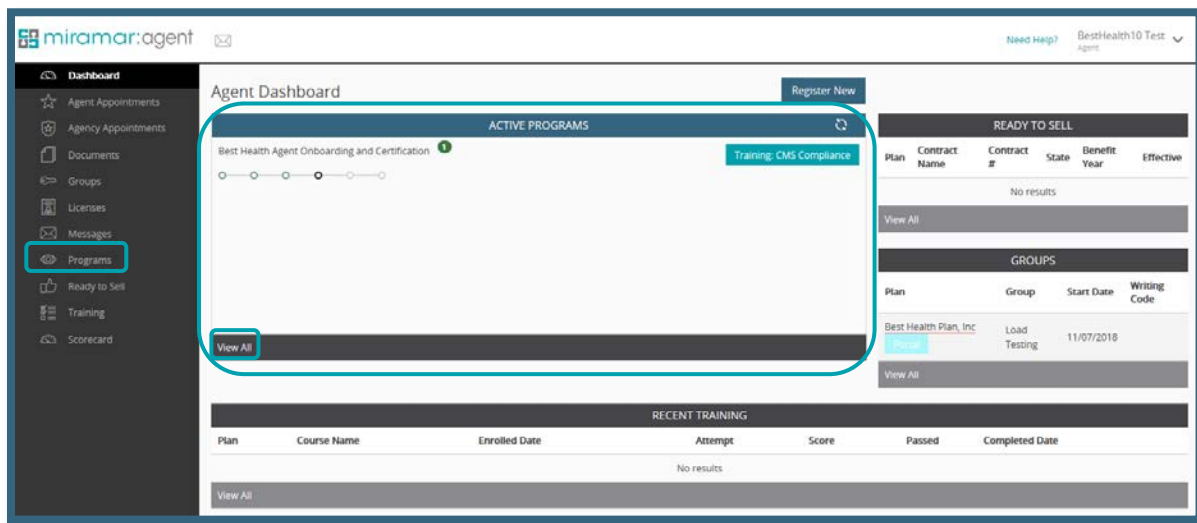
**NOTE:** Some messages are sent as informational only and will not allow a reply.



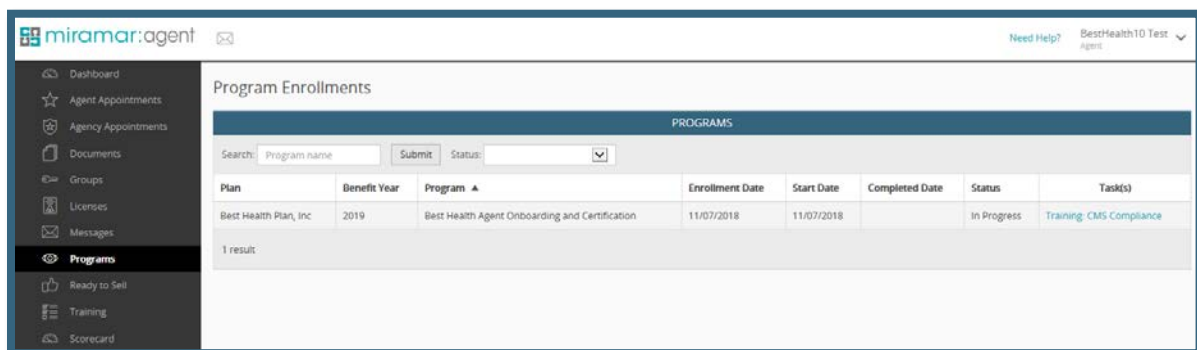
## PROGRAMS

The not started and in-progress programs will appear on the Dashboard under *Active Programs*. This is where you will be able to action your program steps.

To view all programs, including completed or frozen programs, click **View All** under the Active Programs widget or **Programs** from the Dashboard menu.



From the *Program Enrollments* index, you can search by program name and filter by program status. From this index, you have insight into when you were enrolled in the program, when you started and completed the program, as well as what your current status is within the program. Additionally, you can action the program by clicking into what is listed in the *Tasks* column.



Plan	Benefit Year	Program	Enrollment Date	Start Date	Completed Date	Status	Tasks
Best Health Plan, Inc	2019	Best Health Agent Onboarding and Certification	11/07/2018	11/07/2018		In Progress	Training: CMS Compliance







**NOTE:** For more information on how to navigate within a program, see the section on *Program Navigation*.




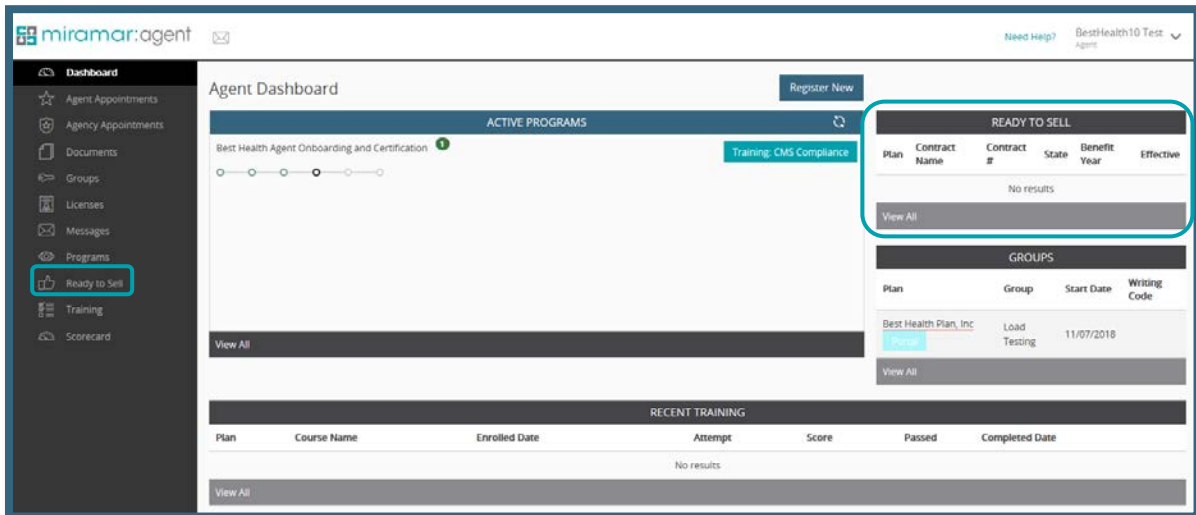
## READY TO SELL

To view a snapshot of the contracts for which you are Ready to Sell (RTS) for the current and upcoming benefit, view the *Ready to Sell* widget on the right side of the Dashboard. To view a full RTS history, click into **View All** from the RTS widget or **Ready to Sell** from the Dashboard menu.

The RTS date is assigned within a program at the point at which required steps are completed as determined by the plan. RTS status is unique for each of the following:

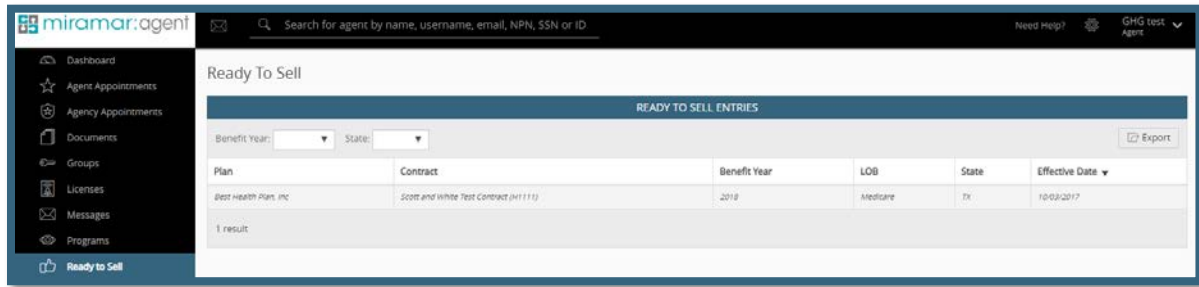
-  Plan / Contract
-  State
-  Benefit Year
-  Effective Date

 **NOTE:** Not all plans use the RTS functionality in Miramar:Agent. If this is the case for the plan(s) whose program(s) you have completed, this section of the Agent Dashboard will not have any records.



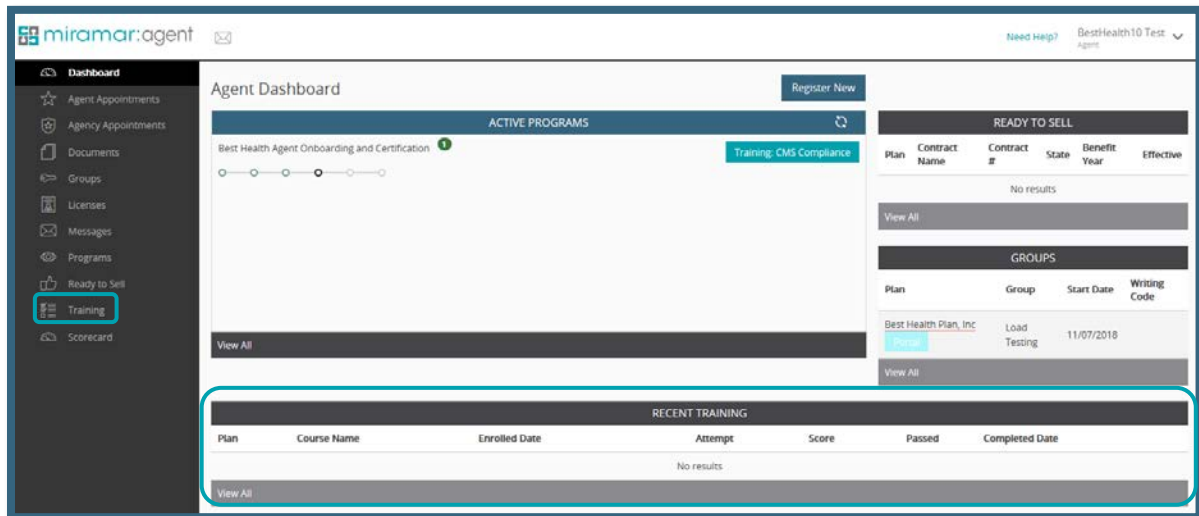
The screenshot shows the Miramar:Agent dashboard. On the left is a navigation menu with 'Ready to Sell' highlighted. The main content area is titled 'Agent Dashboard' and includes a 'Register New' button. It features three main sections: 'ACTIVE PROGRAMS' with a progress indicator for 'Best Health Agent Onboarding and Certification' and 'Training: CMS Compliance'; 'READY TO SELL' which contains a table with columns: Plan, Contract Name, Contract #, State, Benefit Year, and Effective, showing 'No results' and a 'View All' button; and 'RECENT TRAINING' with a table with columns: Plan, Course Name, Enrolled Date, Attempt, Score, Passed, and Completed Date, also showing 'No results' and a 'View All' button.

When viewing the RTS page, you are able to search by Benefit Year or State or sort by Plan, Contract, Benefit Year, LOB, State, or Effective Date by clicking the column headings.



## TRAINING

To view trainings completed within the last year, view the *Recent Training* widget on the bottom of the Dashboard. To view a full history of your training information, click **View All** from the Training widget or **Training** from the Dashboard menu.



From the Training index, you can search by course name or filter by benefit year or passed status.

Agent Training

AGENT TRAINING

Search:  Benefit Year:  Passed:  [Export](#)


ID	Benefit Year	Course ID	Course Name	Enrolled Date ▲	Attempt	Score	Completed Date	Passed
9578	2017	580	2017 GHG HIPAA Training	08/27/2016	1	100	08/27/2016	Yes
190050	2018	1936	2018 Core TEST	10/03/2017	1	100	10/03/2017	Yes
190055	2018	1970	2018 Compliance TEST	10/03/2017	1	100	10/03/2017	Yes
190056	2018	1972	2018 FWA TEST	10/03/2017	1	100	10/03/2017	Yes

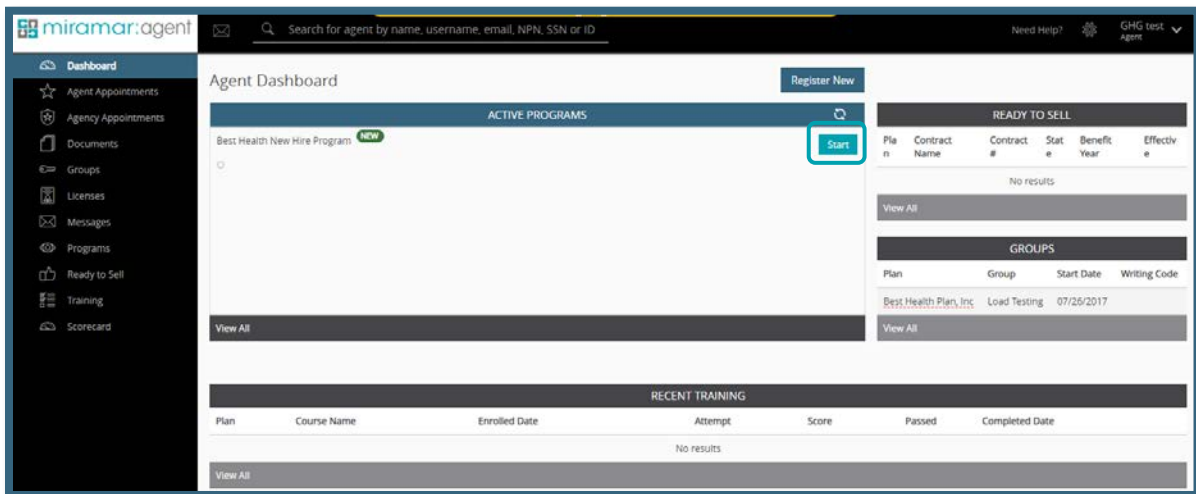
4 results

## IV. PROGRAM NAVIGATION

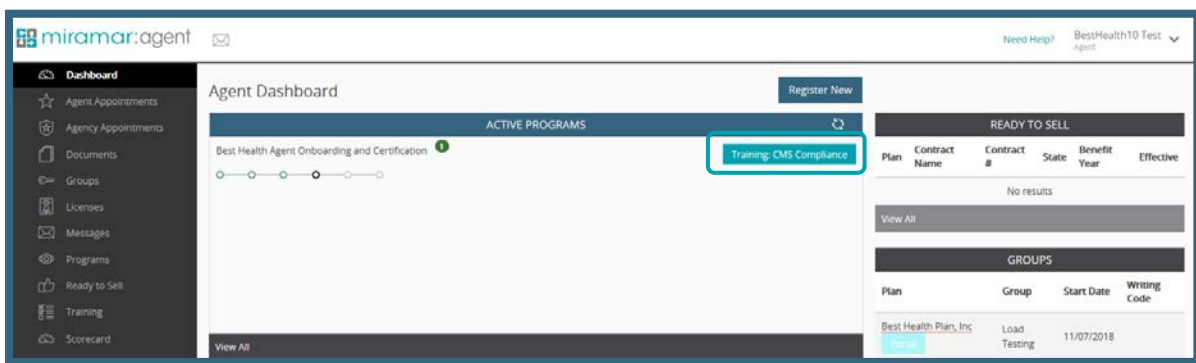
To take action in an active program, go to the Active Programs widget located at the top of the Agent Dashboard.

To the right of the program name, you will see a green button indicating the next action required. If you have not yet started the program, click the green **Start** button to begin the program.

 **NOTE:** If there are actions listed but no green button, this means there are no agent-facing steps for you to complete. The program is waiting for outside information such as plan administrator action, document review, appointment confirmation, background check results, etc. Please check back regularly to see if you have any actionable steps until the program is complete.



The screenshot shows the 'miramar:agent' dashboard. The 'ACTIVE PROGRAMS' section lists 'Best Health New Hire Program' with a 'NEW' badge and a green 'Start' button highlighted by a red box. The dashboard also includes sections for 'READY TO SELL', 'GROUPS', and 'RECENT TRAINING'.

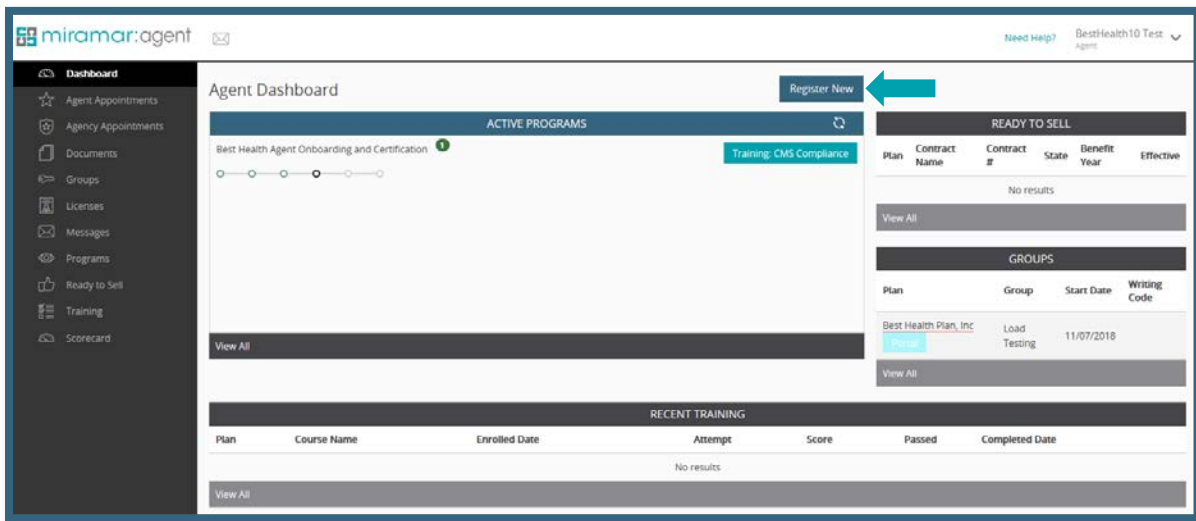


The screenshot shows the 'miramar:agent' dashboard. The 'ACTIVE PROGRAMS' section lists 'Best Health Agent Onboarding and Certification' with a '1' badge and a green 'Training: CMS Compliance' button highlighted by a red box. The dashboard also includes sections for 'READY TO SELL', 'GROUPS', and 'RECENT TRAINING'.


### How do I register for a program using a registration PIN code?

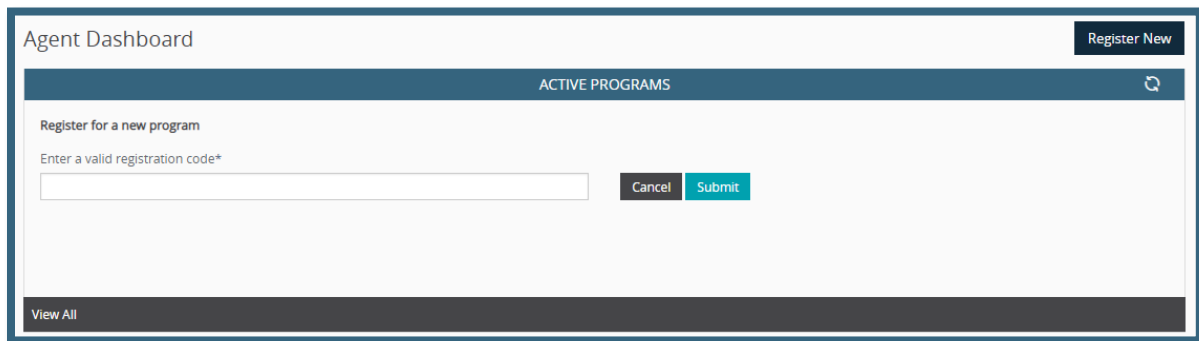
Some organizations may pre-enroll you in programs, in which case you will see the program in your active programs list with a *Start* button.

If you were provided a program registration PIN code by your plan or upline, you can register by clicking the **Register New** button at the top of your screen.

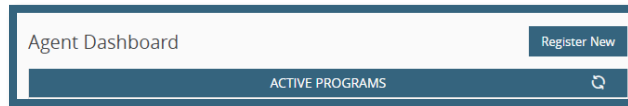
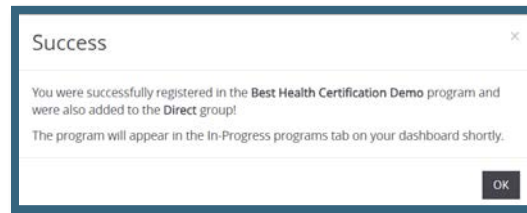


Once you click *Register New*, you will be prompted to enter the program registration PIN code provided by your plan or upline. Click **Submit** to complete the registration. PIN codes are not case sensitive.

 **IMPORTANT NOTE:** If you do not have the registration PIN code for the program you need to complete, please contact your plan or direct upline to obtain one. Miramar:Agent customer support does not provide registration codes.

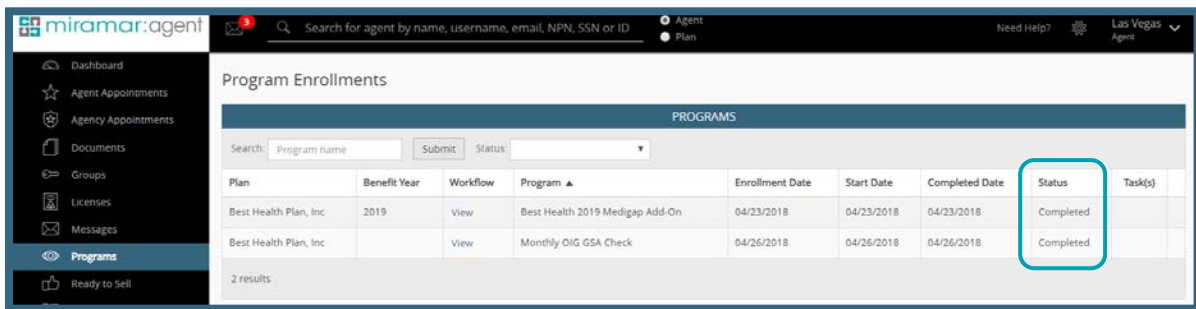


The following screen will pop up to show you have registered successfully. After clicking **OK**, you can click the *refresh icon* in the top right corner of the Active Programs widget to see the new program on your dashboard.



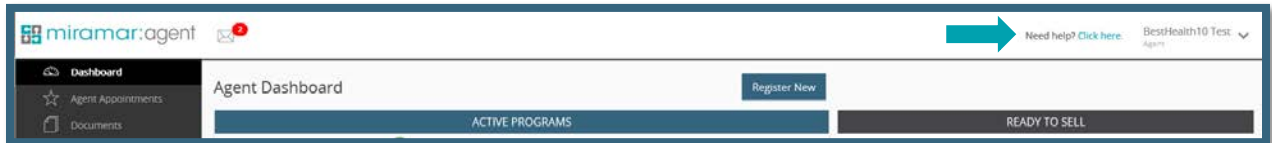
### How do I know if I have completed a program?

You may find that when you log in to your agent dashboard, a program you had previously been working on is now no longer showing on the dashboard. This most likely means you have completed the program. To verify, click **Programs** from your dashboard menu to see the status of your program.



## V. MIRAMAR:AGENT KNOWLEDGE BASE

To access the Miramar:Agent Knowledge Base, go to <https://miramar-agent.com/KnowledgeBase> or click **Need Help? Click here** from the top of any Miramar:Agent page.



Frequently asked questions and helpful training tips for agents can be found on the Knowledge Base homepage. If you need assistance, you can log a ticket by clicking **Submit Ticket** and a representative from our support center will respond within 24 hours.

