

# SilverScript Enrollment Portal 2018 Agent User Guide

Your resource to efficiently navigate our  
award-winning website

Step-by-step instructions to maximize productivity

# Agent Portal User Guide

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**Welcome to the SilverScript Agent Portal**

Login ID

Password

Login

[Forgot Password](#) | [Contact us](#) | [Supported Browsers](#)

**Note:**

Please write down the new password you create as you will not be able to refer back to the welcome email to use the temporary password again. Until your profile is activated by your administrator, you will **not** be able to use the password reset function.

## Logging In

When you navigate to the SilverScript Agent Portal Login page, you'll need your credentials with you.

Use the Login ID **1** you received from your Admin and the temporary password. **2**

You may be asked to change your password and/or update your email address.

If you cannot remember your Login ID password, please click [Forgot Password](#) to reset it.

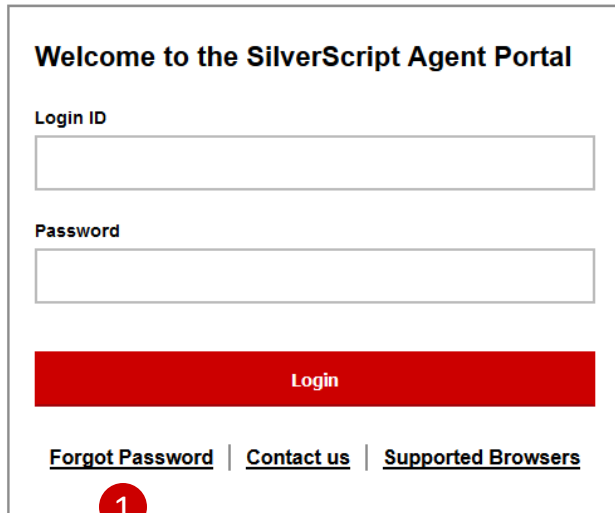
After you've typed in your Login ID and password, click "Login" to proceed.

If you have the correct Login ID and password and still cannot log in, click here **3** to make sure your browser is the correct version and see instructions on how to update.

# Resetting your password

- 1 If it's been a while and you don't remember your password, you can select **Forgot password** on the login screen and enter your agent ID. Remember, your agent ID is the same as your login ID/username.
- 2 After verifying your identity, you can select a new password and enter it twice to confirm. Make sure that it fits the requirements listed. Click **Save**.

Once you've reset your password, then you will be prompted to log back in:



Welcome to the SilverScript Agent Portal

Login ID

Password

Login

[Forgot Password](#) | [Contact us](#) | [Supported Browsers](#)

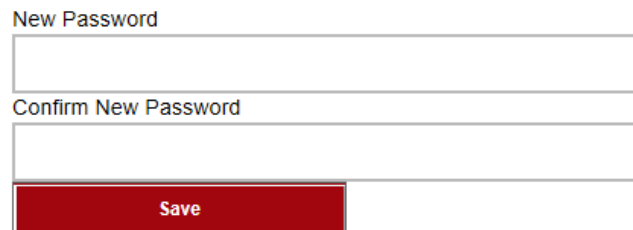
1

## Enter New Password

Please provide a new password for your profile.

The password must be a minimum length of 8 characters,  
contain at least 1 upper-case letter,  
contain at least 1 lower-case letter,  
contain at least 1 special non-alpha-character,  
contain at least 1 number and  
no character can occur 3 times consecutively.

2



New Password

Confirm New Password

Save

Your Social Security Number:

\* Please only enter numbers and no hyphens.

Date of Birth :

Format as MM/DD/YYYY

1. Have you ever been convicted of, or pled guilty or no contest to a felony or misdemeanor involving investments, securities, insurance, real estate, or any type of financial investment or matter? ☐ Yes ☐ No
2. Are you now being sued or have you ever been sued or had a judgment rendered against you? ☐ Yes ☐ No
3. Has any insurance company ever paid a claim on a bond taken out on your behalf? ☐ Yes ☐ No
4. Has any policy or application for errors and omissions insurance on your behalf been declined, cancelled, or refused renewal? ☐ Yes ☐ No
5. Are you now or have you ever been prevented from engaging in any activities related to securities, insurance, real estate, or any other type of financial instrument? ☐ Yes ☐ No
6. Have you ever been discharged or permitted to resign because you were accused of violating investment, real estate, or insurance-related statutes, regulations, or rules of industry standards of conduct? ☐ Yes ☐ No
7. Have any agent or broker contracts that you held with investment, real estate, or insurance companies or agencies been cancelled for cause? ☐ Yes ☐ No
8. Has any entity with whom you were affiliated or a federal or state regulatory agency ever censured you, threatened to suspend or terminate you, or suspended or terminated your license(s) to sell securities, insurance, annuities, real estate, or any other type of financial instrument? ☐ Yes ☐ No
8. Has any entity with whom you were affiliated or a federal or state regulatory agency ever found you made false statement(s) or omission(s) or been dishonest, unfair or unethical? ☐ Yes ☐ No
8. Has any entity with whom you were affiliated or a federal or state regulatory agency ever found you have been involved in a violation of investment, real estate, or insurance-related statutes or regulations? ☐ Yes ☐ No
8. Has any entity with whom you were affiliated or a federal or state regulatory agency ever found you were a cause in an investment, real estate, or insurance agency or business having its authorization to do business denied, suspended, or revoked or restricted? ☐ Yes ☐ No

If the answer is "yes" to any of the above questions, please write details in the following fields

I Agree

I Disagree

# Your background check

When you first log in to the Agent Portal, you'll be prompted to provide your social security number, date of birth, and to complete the form for needed for your background check.

You must pass the background check required by Medicare before you can sell a Part D product.

It's important to understand that a "yes" answer does NOT automatically cause a denial of your background check. Any time there is a "yes" answer, we will need to have you provide more information.

- 1 If you need more room, you can and should use the space to tell us which method you're using to send in a detailed explanation -- either via Silver Mail, email to [AgentSupport@CVSCaremark.com](mailto:AgentSupport@CVSCaremark.com) or fax to 866-208-5262. The additional information will then be reviewed further as needed.

It usually takes anywhere from three to seven business days to get the results. During the prime onboarding season each fall, the turnaround times are increased due to volume. In the case of some **Yes** answers, it may also take additional time to review and make a determination. Agents should communicate with their upline administrators to find out more information if there are longer delays. Administrators can in turn check with SilverScript Agent Support to determine the reason for any delay.

Plan Year: 2018 ▼

Ready to Sell | Welcome, Demo Agent (Marketing Agent) | Help | Log Out  
Last Successful Login : 06/11/2018 11:04 am

SilverScript®

3

Order  
Supplies

Drug  
Prices

Pharmacy  
Locator

Silver Mail ▼

Enrollment ▼

Reports ▼

Tools ▼

Resources ▼

I want to ... ▼

1

## News

### New Portal Goes Live June 16

Posted 06/04/2018

The new SilverScript Agent Portal will move into the Production environment at 6 AM Pacific time on June 16. All users will log in with their current Login ID and password, and will then be required to create a new password and update their email address.

### iPad Enrollment App Update

Posted 05/02/2018



A new version of the iPad enrollment app was released on 4/27/2018. Users of the version 2.3 of the app will see some enhancements. As with the previous version, the formulary module will now display either the Choice or Plus plan formulary, as will the Pharmacy module. The new update also provides an export to Excel option in the iPad

## Formulary Update

### Xarelto® Added Back to SilverScript's 2018 Formularies

Posted 05/15/2018



SilverScript continually negotiates with drug manufacturers to get the lowest costs for our valued members.

For 2018, we are pleased to announce that ongoing negotiations allow us to make an update to our formulary. The commonly prescribed drug Xarelto will continue to be covered in 2018. This update did not appear in the abridged formulary (printed drug list) members received in your Annual Notice of Changes.

Get accurate pricing for 2018 SilverScript plans.

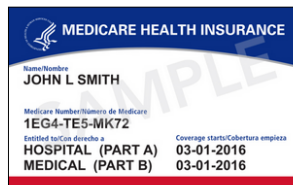
Xarelto won't be visible as a covered drug on the Medicare.gov Plan Finder until

## Good to Know

### New Medicare Cards and MBI

Posted 05/02/2018

Your clients may have already received their new Medicare cards that show a **Medicare Number** instead of the previous Health Insurance Claim Number (HICN). Here's what the card looks like:



Agents are beginning to see the changes from HICN to **Medicare Beneficiary**

## Newsletters

Remember to check here each time you visit the Portal for news, updates from CMS (Medicare) and agent-specific messages.

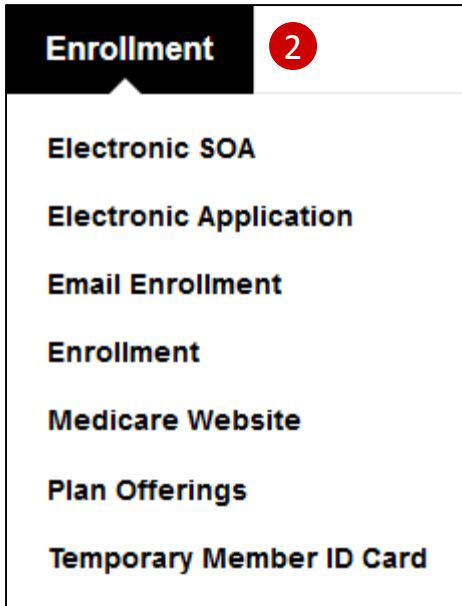
06/11/2018	<a href="#">New Agent Portal - Part 2</a>
06/04/2018	<a href="#">New Agent Portal</a>
05/15/2018	<a href="#">March 29, 2018 Marketing Agent eNewsletter</a>
05/15/2018	<a href="#">January 9, 2018 Marketing Agent eNewsletter</a>
	<a href="#">More News...</a>

# The Home Page

You'll land on the **Home** page each time you log in to the Agent Portal.

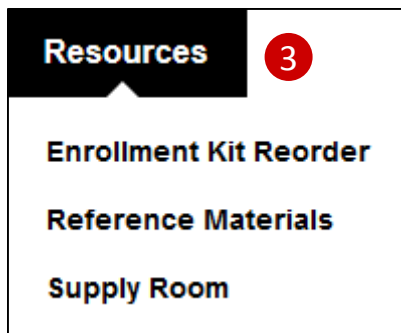
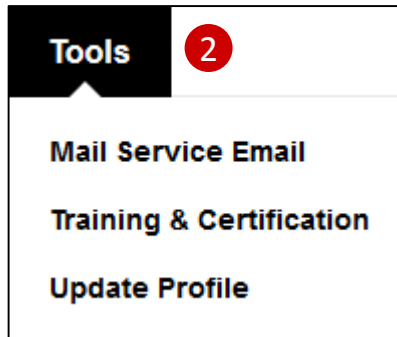
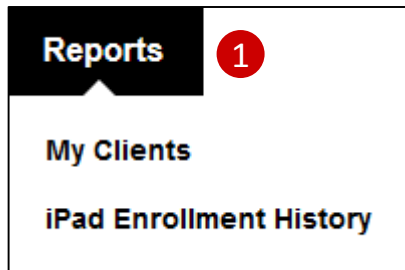
It's good to get in the habit of scanning each of the four sections of the main area of the page, since this is where we post the latest news and information for you.

- 1 Main navigation menu
- 2 Your Ready to Sell status: red = no, green = yes.
- 3 One-click links to **Supply Room**, **Drug Pricing** tool, and **Pharmacy Locator**.
- 4 Click the SilverScript logo from any page to return to the Home page.



# Agent Menus

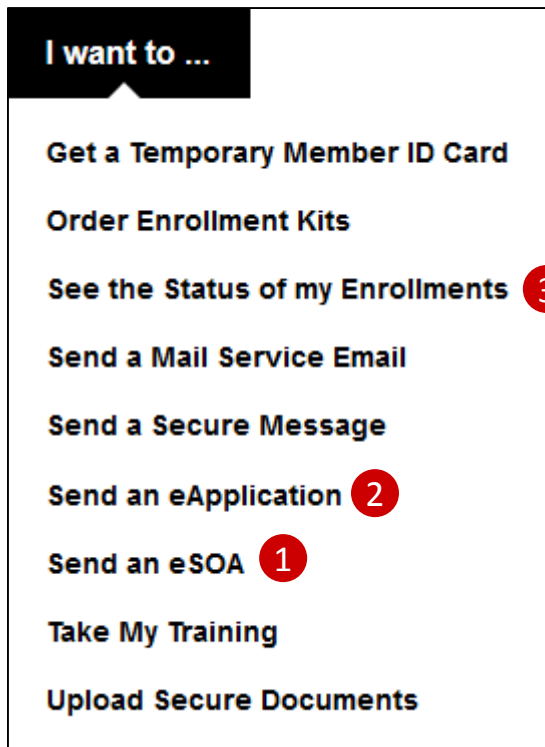
- 1 The [Silver Mail](#) menu provides a direct link to the secure messaging inbox.
- 2 The **Enrollment** menu contains all enrollment-related commands including a link to Medicare.gov, SilverScript plan offerings, and a downloadable temporary member ID card.



# Agent Menus

- 1 In the **Reports** menu, the My Clients link shows the status of all your client enrollment applications.
- 2 The **Tools** menu includes the link to the [annual training and certification materials](#), an email to your clients about mail service pharmacy, and a way to update your user profile.
- 3 The **Resources** menu points you to the [Supply Room](#) for enrollment materials, and the Reference Materials library. You may also order enrollment kits from this menu.



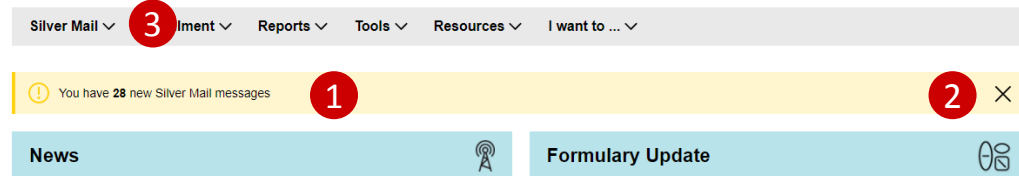


# Agent Menus

The **I want to ...** menu provides one-click access to your most frequently used activities on the Agent Portal.

Using only this menu, you could send:

- 1 An electronic Scope of Appointment,
- 2 An electronic enrollment Application,
- 3 And then check on the status of your enrollments for follow-up with your clients.

**Note:**

**IMPORTANT:** Sending any PII/PHI through an unencrypted email is a HIPAA violation. Enrollment applications, as well as follow up status requests, should be sent through Silver Mail unless you have secondary encryption software or you send it by fax.

**Note:**

Silver Mail is an effective way to communicate if you have any personal health information to send to us. To remain secure, SilverScript is unable to open anything using Dropbox or similar third-party file transfer methods.

We're able to access ZixSecure, Ironport, and Microsoft Office encryption, but if you don't have these already, we recommend you use Silver Mail.

# Silver Mail

Silver Mail is a vital tool for sending any communications to SilverScript, especially when the message contains any protected information.

Silver Mail is secure, encrypted and only you and SilverScript Agent Support can view your messages. Sending any PII/PHI electronically in an unsecured email violates CMS's and SilverScript's security policies and procedures.

- 1 Each time you log in to the Agent Portal, you'll see a banner that shows if you have Silver Mail messages waiting for you.
- 2 Click the "X" on the banner to close it until your next log in.
- 3 Place your mouse over the Silver Mail menu to access your Inbox.

# Silver Mail

The screenshot shows the Silver Mail compose interface. At the top left is a red 'Compose' button with a red circle '1' next to it. Below this is a sidebar with 'Inbox (0)' and 'Sent (0)'. The main area has a 'Subject' field with a red circle '2' and a 'Select Category' dropdown. Below that is an 'Attachments' section with a 'Choose' button, the text 'No file chosen', and a red circle '3'. There is an 'Upload' button below the attachments. Further down is an 'Enrollment Confirmation Numbers' section with a text field (red circle '4') and an 'Attach' button. At the bottom of this section are 'Send', 'Cancel', and 'View Attachments' buttons. Below these is a rich text editor with various formatting tools and a large text area (red circle '5').

**Note:** If you send a message to SilverScript through Silver Mail, please do not reply again to the same message to which you're waiting for an answer, as this will change the date stamp and may delay the reply. We work each category topic from oldest to newest.

When you send communication through Silver Mail, email or phone, please don't duplicate the request using another method. This will cause delays in responses, not just with your issue but also with other agents. It also can cause duplication within other departments, slowing their processing times as well.

## Silver Mail: Compose a Message

Silver Mail sends secure messages directly to SilverScript's Agent Support team.

- 1 Click here to start writing a message.
- 2 Enter a subject for your message and select a category from the drop-down list.
- 3 You can chose to add an attachment, which is especially useful for submitting new enrollment documentation or training certification from AHIP, Pinpoint, or Gorman.
- 4 If you're sending a scanned enrollment, you can enter that enrollment's confirmation number and click on **Attach** to associate it with the enrollment that you entered.
- 5 Type your message here, then click Send when you're finished.

## Silver Mail

The screenshot displays the Silver Mail interface. At the top left is a red 'Compose' button. Below it are links for 'Inbox (0)' and 'Sent (0)'. The 'Message Search' section, marked with a red circle '1', includes checkboxes for 'Search Subject Line' and 'Search Messages', a 'Search Item' text box, and 'Start Date' and 'End Date' date pickers. Below these are 'Search' and 'Clear' buttons. The 'Task ID Search' section includes an 'Enter Task ID' text box and a 'Find Task' button. At the bottom, a 'Select Category to View:' dropdown menu, marked with a red circle '2', is open, showing a list of categories: All, Access to Care, AHIP Upload/Question, Billing Issue/Request, Commissions, Complaint, Correction Request, Drug/Formulary Question, Enrollment Status Inquiry, Good Standing, iPad Issue, Member Materials, Mobile App Image Upload, New Enrollment Docs, Other, Product Questions, Sales Event, Supplies Issue, Training Questions, and Website Problem. To the right of the dropdown is a checkbox for 'Display Unread Messages'.

## Silver Mail: Searching

- 1 If you want to find a specific message, use the filters to search by message type or date range.
- 2 You may also search by message category, selecting from the drop-down menu. Here are some of the common categories:

### Access to Care

Use if the member should have drug coverage in place but there's an issue preventing the member from obtaining medications.

### Drug/Formulary Question

For general questions regarding the formulary or a specific drug in the formulary. Please be aware we cannot view claims for a member.

**Enrollment Status Inquiry** Use this if the enrollment has already been submitted and you don't see the enrollment in your reports, or it's in the reports but not yet active.

**New Enrollment Docs** – This is used only to submit paper documentation regarding a new enrollment that has been received and entered into the portal (see **Enrollments**) Please do not submit other documents or questions under this category.

**Training Questions** – This is used if you have had a systems issue with one of the training courses. We may be able to reset a course if failed due to system issues (not including user error).

# Silver Mail: Search Results Table

1	2	3	4	5	6	7
Task ID	Msg From	Category	Subject	Time Stamp	Attach	Lock
191862	Support@csdhs	New Enrollment Docs	New docs but no attach	06/08/2018 03:15 PM		
191864	Support@csdhs	Other	attachment a	06/08/2018 03:12 PM		🔒
201864	Support@csdhs	Other	attachment test doc a	06/08/2018 03:05 PM		🔒
191855	Support@csdhs	Correction Request	Test data	06/04/2018 07:19 AM	📎	
191859	Support@csdhs	Good Standing	gentle test	06/04/2018 07:17 AM	📎	
Go to page: 1 Show rows: 10 1-20 of 191855						

When you search your Silver Mail messages, the results display in a table on the same page.

- 1 Each task has an ID.
- 2 When Agent Support responds to your message, their name is here.
- 3 The category under which the message was created.
- 4 The subject line of the message.
- 2 Date and time of the message.
- 3 The paper clip icon indicates the message has an attachment.
- 4 The lock icon indicates the message needs to be unlocked before you can work with it.

**Note:**

**Appointments** -- Other than a few states in which you'll be immediately appointed, most states are appointed "just in time" per that state's regulations. As long as your license shows active, and all other onboarding steps have been completed, you can write in that state. You'll be appointed when you enter your first enrollment into the Agent Portal for that state and receive the confirmation number.

**Sending enrollments before you're Ready to Sell** -- The Agent Portal is designed to prevent an agent from entering an enrollment into the portal until they have achieved good standing for that plan year, and a valid license exists for the client's resident state. Certification is annual, so you could be in good standing for one year, but not yet for the next year. If you send in an enrollment and not yet in good standing for that plan year, you are considered out of compliance, therefore you cannot receive commission on that enrollment for that plan year.

It's possible that you can receive later renewal commissions as long as you have completed the next year's certification before the renewals commission deadline. (The last day of AEP, currently set as December 7, is the deadline for the next plan year in order to receive renewals commissions.) Check with your contracting upline to see if there are conditions that may override this process.

# Ready to Sell

The Ready to Sell indicator tells you at a glance if you've met the SilverScript and CMS (Medicare) criteria to represent SilverScript and sell our plans.

- 1 Your Ready to Sell status is always displayed at the top of the web page: red = no, green = yes.

To be Ready to Sell, you must:

1. Pass your [background check](#).
2. Hold at least one state insurance license.  
When your background check is completed, our system uses your SSN and name to go to the National Insurance Producer Registry (NIPR) website to get all of the licenses affiliated with you, even if they are inactive. It may take up to 24 hours for the Agent Portal to show your licenses, which is normal.
3. Pass your annual [certification](#).

## Training and Certification

Before you're able to access all portal functionality, you'll need to complete your SilverScript annual certification.

### Current Training Status

Course ID	Course Name	Last Access	Completed date	Status
2018_ECert	2018 Certification for Agents			Not Attempted
2018_E2	2018 Compliance Course for Contracted Agents			Not Attempted
2018_E1	2018 Medicare Overview for Contracted Agents			Not Attempted
2018_E3	2018 SilverScript Product and Process Course			Not Attempted
2018_CMS	CMS Required Compliance and FWA Training			Not Attempted

### Did you take AHIP or Pinpoint training?

Click the appropriate "Transfer Credits" button to have your AHIP or Pinpoint results automatically sent to SilverScript. Once you click the transfer button, click "Continue." It's that simple! The transfer credits are typically applied to your SilverScript profile the next business day.

[Transfer My AHIP Credits](#)[Transfer My Pinpoint Credits](#)

### Did you take Gorman training?

Upload your Gorman certificate so we can apply the credit.

Select the Gorman certificate file from your computer to upload.

Acceptable file formats: PDF, JPEG, JPG, BMP, TIFF

#### Select Gorman File

[Choose](#) No file chosen[Upload](#)

We will apply your Gorman coursework to the Medicare Overview, CMS FWA, and Medicare Compliance courses. You should see the results reflected in your status within 3 business days. Remember, you'll still need to complete the SilverScript-specific courses.

#### ► How to Access the SilverScript Certification Curriculum

### Launch to complete your SilverScript courses

Keep in mind that you can download/open a PDF version of each training course for reference while you are taking the tests. Click on the Reference Material link under the Resources menu tab to view course PDFs.

[Launch Training](#)

#### ► Your Initial Supply and Reordering of Enrollment Kits

1 Medicare requires that all insurance producers, agents, and representatives of a Medicare plan complete annual certification. Your status is shown in this table.

SilverScript typically has the upcoming year's certifications available in early August. If you've completed Medicare training from AHIP, Pinpoint, or Gorman for the year for which you are certifying, we'll give you credit for completing the SilverScript Insurance Company Medicare Overview (E1) course, the SilverScript Compliance (E2) course, and the CMS Compliance and FWA (E3) course. Please allow 2-4 days for results from third-party training companies to be posted on the Agent Portal.

*If you have not completed Medicare training from any other sources, you can complete our courses at no cost.*

### 2 AHIP and Pinpoint Certification

SilverScript now has a direct relationship with the AHIP and Pinpoint training websites. Agents who have completed initial training and/or annual re-training certifications through AHIP or Pinpoint can click the appropriate button to have core Part D training results submitted to SilverScript.

### 3 Gorman Certification

If you have completed the annual Medicare certification through Gorman instead of AHIP, click here to send us a copy of the certificate.

### State DOI Certification

Many states use the AHIP course but also apply the course to their state continuing education requirements and their certification will be acceptable instead of the AHIP direct certification. Please send a copy of that state's CE certification through Silver Mail using the **AHIP Upload/Question** category.

## ► How to Access the SilverScript Certification Curriculum

### Launch to complete your SilverScript courses

Keep in mind that you can download/open a PDF version of each training course for reference while you are taking the tests. Click on the Reference Material link under the Resources menu tab to view course PDFs.

Launch Training

1

## ► Your Initial Supply and Reordering of Enrollment Kits

2

The screenshot shows the CourseMill interface with a user profile 'Demo Agent (Student)'. The 'My Courses' tab is active, displaying a table of completed courses. A green and white icon is highlighted next to the first course, 'SilverScript Annual Certification for External Agents'. Below the table, a legend indicates that the green and white icon is used to launch courses.

Course ID	Name	% Complete	Status	Score	Expiration	Prerequisites
2018_E1	2018 Medicare Overview for Contracted Agents	100%	Passed	98		
2018_E2	2018 Compliance Course for Contracted Agents	100%	Passed	98		
2018_CMS	CMS Required Compliance and FWA Training	100%	Passed	98		
2018_E3	2018 SilverScript Product and Process Course	100%	Passed	98		
2018_ECert	2018 Certification for Agents	100%	Passed	98		

Legend: Launch Courses: Click to Open the Course or Unit Curriculum: Open to View Courses

### Note:

If you have submitted your AHIP/Gorman/State DOI certificate of completion for that year's Medicare courses, then skip over the first three courses in the list shown above, and go to the E3 SilverScript Product and Process course for that plan year.

Remember that there's a PDF version of all the course materials on the **Reference Materials page**, available for open book use on the test. There are also PDF versions of the other courses for those who don't use external certification sites.

# SilverScript Training and Certification

Even if you've taken and received credit for external training courses, there are still two SilverScript-specific courses you need to pass. At the bottom of the **Training and Certification** page, you'll see a button to launch the SilverScript training.

1

2

3

4

Clicking the button takes you to our external training site, **CourseMill**.

Click the green and white icon to access the course list.

After you click the icon, a list of the assigned training courses will appear. Start each course by clicking the blue and white launch icon next to the course name. After you complete a course and pass the exam you will be directed back to the **My Courses** page. Repeat these steps until you complete all the required courses. Do not attempt courses for which you have requested that SilverScript apply your AHIP or Gorman credit.



# Welcome to the Supply Room

## Initial Supply

We automatically send an initial supply of 10 enrollment kits to agents upon completion of the 2018 certification curriculum. The first batch of materials should arrive prior to October 1st.

## Reorders

To place reorders, simply click the button below. Please be sure to verify or update your shipping address (we cannot ship to PO Boxes). Enter the quantity of kits that you want -- your request needs to be in multiples of 10.

Order Online

1

## Instant Access to Enrollment Materials

You can download complete Enrollment Kits or any of the individual documents by selecting the appropriate state below. Please remember that all pages must be given to all clients who sign an enrollment form.

To view and download Supply Room documents, please select the appropriate State from the list below.

State

2

View available documents

**NOTE:** If a user is shown as an Admin-Agent in their profile, kits are not automatically shipped and can be ordered via [Fulfillment trigger for agents](#) available in the Resources menu for Organization Admins and Managers.

# Enrollment Kits and Supply Room

The initial set of enrollment kits are shipped out as soon as you achieve [Ready to Sell](#) status. The first shipment contains the enrollment kits, a copy of each formulary, a car coach booklet, scope of appointment forms, and a checklist to help you keep track of all the steps to an enrollment that are necessary for compliance.

- 1 Click "Order Online" if you need additional kits. Remember to request kits in multiples of 10, the maximum limit is 100. Car Coaches are not included.

The **Supply Room** is where you'll find free PDF copies of enrollment kit materials, as well as some other items, like a claim form and the comprehensive formularies.

- 2 Select **Supply Room** from the **Resources** menu, then select the state in which your client lives -- only the states in which you're licensed will appear in the dropdown. Then click "View available documents" to view and download the information you or your client need.

You may also access the **Supply Room** by clicking this icon in the header at the top of each page:



Order  
Supplies

## Plan Offerings

State

Arizona

1

Choice

Plus

2

### Plan Design - SilverScript Choice

#### State Specific Plan Information

3

- \$0 Deductible on Tiers 1 & 2, \$100 deductible for Tiers 3-5
- Preferred pricing available at nationally at CVS Pharmacy and many other local independent pharmacies
- \$0 Copays on Tier 1 drugs with 90-day supplies by CVS Caremark Mail Service Pharmacy

Plan Design	SilverScript Choice		
Premium	\$28.50		
Region Benchmark	\$32.88 (SilverScript Choice PDP under by \$4.38)		
Annual Deductible	\$0 deductible applies to Tiers 1 and 2, \$100 deductible applies to Tiers 3 through 5		
	Retail Pharmacy Preferred / Standard	Retail Pharmacy Preferred / Standard	Mail Service Pharmacy Preferred
Copay savings at Preferred Pharmacies <sup>1</sup>	Up to 57%		
	30-day	90-day	90-day
Tier 1	\$3 / \$7	\$7.50 / \$21	\$0
Tier 2	\$16 / \$20	\$40 / \$60	\$40
Tier 3	\$41 / \$47	\$102.50 / \$141	\$102.50
Tier 4	45% / 50%	45% / 50%	45%
Tier 5	31%	N/A	N/A
Coverage Gap (donut hole)	Members leave the ICL stage and enter the Medicare Coverage Gap when they have reached \$3,750 in total yearly drug costs (not including monthly premiums) Generic drugs: Members pay 44% of the cost Brand drugs: Members pay 35% of the cost		
Catastrophic Coverage (after donut hole)	Members enter the catastrophic coverage stage when they have spent \$5,000 out of pocket (not including monthly premiums) Generic drugs: Members pay the greater of 5% coinsurance or \$3.35 copay All other drugs: Members pay the greater of 5% coinsurance or \$8.35 copay		


## Plan Offerings




This page describes the various plans offered by SilverScript including their premiums, deductibles, and co-pays by tier at retail and by mail delivery.







- 1 You're able to view the plan offerings only for the states in which you're licensed. Select the state you want from this drop-down list.
- 2 Click here to change plans.
- 3 Each plan description includes State Specific Plan Information that summarizes plan features to help you provide important information to your clients.

#### Note:

The Plan Offerings are only available to agents who are [Ready to Sell](#).



Plan Year: 2018  Ready to Sell | Welcome, Demo Agent (Marketing) | Help | Log Out  
 Last Success: 06/13/2018 07:41 pm

**SilverScript®**  Order Supplies  Drug Prices  Pharmacy Locator

Silver Mail  Enrollment  Reports  Tools  Resources  I want to ... 

**SilverScript®**

**Drug Pricing Tool**

States:  Arizona 

## Drug Pricing Quote

Your drugs will be priced for: Arizona

With our Drug Pricing Quote tool you can compare costs for your medications. You can also use it to search each SilverScript formulary for our plans to see what drugs are covered.


Quote Number:



Enter Member ID, and if available, Date of Birth to retrieve historical drug claims:

Member ID

mm/dd/yyyy



### Create Your Drug Quote

Search for prescription drugs:

### Note:


The Tool's pricing files are updated every two weeks. This allows you to make accurate estimates, but you should always remind your client that this is only an estimate, and prices are always subject to change.

# Drug Pricing Tool

The **Drug Pricing** tool provides information to help you review plans based on your client's current drug needs.

The drug costs displayed are estimates and may vary based on the specific quantity, strength, dosage of the medication, the order in which your client purchases their prescriptions, and the pharmacy they use.

Make certain that you are given the most accurate information possible to get the most accurate estimate for your client.

- 1 Click the icon to get started.  **Drug Prices**
- 2 Select your client's state in the drop-down list.
- 3 Enter the first few letters of the drug name. If your client takes the generic for a medication, make sure that you enter the generic name instead of the brand name.

For detailed instructions on using the **Drug Pricing** tool, visit the User Guides section of the Agent Portal **Reference Materials** page.

# Enrollment

Application Type	Portal Entry Needed?	SOA Needed?	In Person?	Over Phone?	Wet Signature?	Send copy to SilverScript?
Paper Enrollment via Mail	Yes <sup>a</sup>	No <sup>b</sup>	No	No	Yes	Yes
Paper Enrollment in person	Yes <sup>a</sup>	Yes	Yes	No	Yes	Yes
Enter Directly into Portal	Yes <sup>a</sup>	Yes	Yes	No	Yes <sup>c</sup>	Yes
Email Enrollment Link	No	Yes	No	No	No	No
Electronic Application	Yes <sup>d</sup>	Yes	No	Yes <sup>e</sup>	No	No
iPad App Enrollment	No	Yes	Yes	No	No	No

There are six ways to complete an enrollment application successfully with SilverScript. Also noted in this chart is when the Scope of **1** Appointment (SOA) forms are needed and when they are not. This can help you decide which options are the best for your clients and your business.

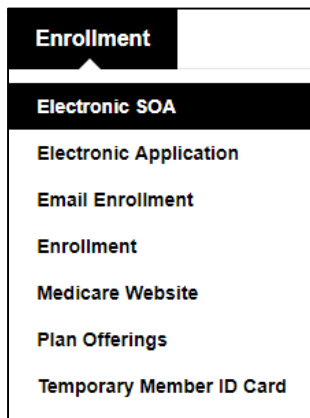
There are several methods to keying in an enrollment into the Agent Portal, depending on the application type.

- a) Paper applications or entering the application directly into the portal uses the **Enrollment** link in the Enrollment menu.
- b) A paper application via mail with no meeting doesn't require an SOA, but if there was a meeting, either in person, on the phone or by email, then an SOA is needed.
- c) Wet Signature on the portal-direct application is on the three page confirmation – which must be immediately printed to get the correct signature lines to print.
- d) Submitting an electronic application for the client to review and digitally sign uses the **Electronic Application** link in the Enrollment menu.
- e) Telephonic enrollments are allowed only in specifically contracted call centers. However, with a Scope, you can complete a sales meeting over the phone with your client.

## IMPORTANT:

A common misconception about enrollment processing is that it's acceptable to complete a paper application and send it to SilverScript without entering it into the portal first. **This is not compliant with SilverScript procedures, and may affect commissions.**

All enrollment applications must be entered into the Agent Portal by you, or your assistant or upline admin, before sending the paper form to SilverScript.



Enrollment

Electronic SOA

Electronic Application

Email Enrollment

Enrollment

Medicare Website

Plan Offerings

Temporary Member ID Card

1

2

All fields are required, unless marked as optional.

To be completed by Agent

Agent Name

Demo Agent

Agent Phone

480-314-8074

Agent Address

9501 E Shea Blvd, Scottsdale, AZ, 85260

Beneficiary Name

Beneficiary Phone

Beneficiary Address

Initial Method of Contact (Indicate here if beneficiary was a walk-in.)

Agent Signature

Plan(s) the agent represented during this meeting

Plans

# Electronic Scope of Appointment

SilverScript offers an Electronic Scope of Appointment (eSOA) form available for agents to use. It's fast, convenient, and doesn't restrict its use to only SilverScript (as long as other plans will accept an SOA with another company logo on it). Click **Electronic SOA** in the **Enrollment** menu to start. 1

As the agent, you will receive the completed SOA in moments after the client completes their portion. The eSOA does not automatically link to any enrollment, therefore it will need to be submitted when the client completes an application, either with the paper application or sent by itself in the case of iPad and Electronic Applications.

- 2 First, you scroll down to complete the sections that are not grayed out. Your client will receive the SOA and initial the type of products she wants to discuss with you, and she will fill in her name. If she's the representative for the person enrolling, she will complete that section as well.

Date of Appointment

### Instructions for agents

If you are doing a sales presentation to a beneficiary, you **MUST** have a documented scope of what you will be discussing with the beneficiary prior to the appointment. A beneficiary cannot agree to the scope over the phone and sign the documentation later. Documentation must be in writing in the form of a signed document by the beneficiary. You must send this documentation with the enrollment form to SilverScript® Insurance Company.

\* Scope of Appointment documentation is subject to CMS record retention requirements \*

If the form was signed by the beneficiary at time of appointment, provide explanation why SOA was not documented prior to meeting

SilverScript is a Prescription Drug Plan with a Medicare contract offered by SilverScript Insurance Company. Enrollment in SilverScript depends on contract renewal.

Please provide the email address of the prospective beneficiary.

Send Email

## SOA History 2

### Search for a Scope of Appointment

Beneficiary Name

Beneficiary Email

Status

#### Status Definitions

- **Signed:** SOA Form is signed by beneficiary and sent back to agent
- **Expired:** SOA link expired after two weeks
- **Viewed:** SOA form was viewed by the beneficiary but not signed
- **In Progress:** SOA link sent to beneficiary

# Sending the eSOA

If you are on the phone with your client, you can send the eSOA and it should show in their inbox within a minute of when you send your email.

The email is from information@silverscript.com, with the subject, “Here is the Scope of Appointment for your signature.” Note: It might land in their spam filter or junk email so the client may need to take appropriate actions in order to view the email.

- 1 If your client is a walk-in and doesn't have email, you can use your own email address as long as your client access the email, reads the eSOA, and digitally signs their portion to submit back to you
- 2 You can click the SOA history button to view the status of all the eSOAs you've sent. You can filter the results by using the search fields.

Please note that if your client doesn't respond to the eSOA email, the link will expire after 14 days.

# Receiving the eSOA

Dear Test Test,

Thank you for the opportunity to provide you with information, cost estimates, enrollment assistance and customer service for Medicare health plans in your area.

Please click on the link below to be taken to a secure website where you can review, complete, and electronically sign a Scope of Appointment form required by Medicare before we can discuss your Medicare health plan options.

[CLICK HERE for Scope of Appointment](#) **1**

If you have any questions, please do not hesitate to contact me.

Sincerely,  
Demo Agent  
Licensed Insurance Agent

480-555-1212 **2**  
9501 E Shea Blvd, Scottsdale, AZ, 85260

You are receiving this email because you requested to receive an esignature-enabled Scope of Appointment form by email that Medicare requires insurance agents to obtain before discussing Medicare health plans with consumers. If you do not want to be contacted again via email, please send an email to [\[redacted\]](#) with the subject line: Do Not Email Me Again. **2**

**CONFIDENTIALITY NOTICE:** This communication and any attachments may contain confidential and/or privileged information for the use of the designated recipients named above. If you are not the intended recipient, you are hereby notified that you have received this communication in error and that any review, disclosure, dissemination, distribution or copying of it or its contents is prohibited. If you have received this communication in error, please notify the sender immediately by email or telephone and destroy all copies of this communication and any attachments.

---

Please initial below beside the type of product(s) you want the agent to discuss.

☐ Stand-alone Medicare Prescription Drug Plans (Part D) **3**

**Medicare Prescription Drug Plan (PDP)** - A stand-alone drug plan that adds prescription drug coverage to Original Medicare, some Medicare Cost Plans, some Medicare Private-Fee-for-Service Plans, and Medicare Medical Savings Account Plans.

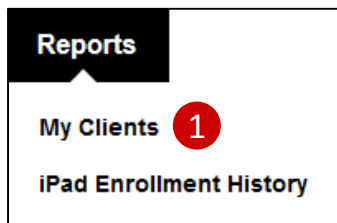
☐ Medicare Advantage Plans (Part C) and Cost Plans **3**

Here's the email your client receives for the electronic SOA. All they have to do is click **1** and they will go to the eSOA online.

Your name and email address are included in this email so your clients can trust it came from you. **2**

Once your client is reviewing the eSOA form online, all she has to do is initial one or both **3** boxes, just like with the paper SOA form.





SilverScript®

Drug Prices

Silver Mail ▾ Enrollment ▾ Reports ▾ Tools ▾ Resources ▾ I want to ... ▾

## My Clients

Organization 2

Org Name ▾

- ☐ Ritter Insurance Marketing
  - ☐ Absolute Insurance Management
  - ☐ Admin87
  - ☐ AKT BENEFIT ADVISORS LP
  - ☐ ALDERETTE INSURANCE AGENCY, INC.
  - ☐ AMERICAN RETIREMENT INSURANCE SERVICES
  - ☐ Anderson Ins Company
  - ☐ APROPOS INSURANCE SOLUTIONS, INC.
  - ☐ Arch Brokerage, INC
  - ☐ ASHLAND INSURANCE INC.
  - ☐ AUERBACH & GUSSIN INSURANCE AND FINANCIAL SERV INC

Note: Always confirm 'Start' and 'End' dates before downloading your client activity

Application Start Date

10/01/2005

Application End Date

06/26/2018

Agent Name 3

4 Search Click here to search by Medicare ID Number

### Enrollments

Print Export to Excel

Click an underlined item to see more detail.

Plan Type	Submitted	Enrolled	Disenrolled	Denied	Pending	Cancelled	Correction Needed
SilverScript	<u>413</u>	<u>0</u>	<u>388</u>	<u>0</u>	<u>0</u>	<u>25</u>	<u>0</u>
SilverScript Choice	<u>3300</u>	<u>3033</u>	<u>99</u>	<u>11</u>	<u>39</u>	<u>116</u>	<u>2</u>
SilverScript Plus	<u>1202</u>	<u>276</u>	<u>890</u>	<u>0</u>	<u>3</u>	<u>33</u>	<u>0</u>
SilverScript Complete	<u>164</u>	<u>0</u>	<u>160</u>	<u>0</u>	<u>0</u>	<u>4</u>	<u>0</u>
EGWP	<u>1</u>	<u>1</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>
Totals	<u>5080</u>	<u>3310</u>	<u>1537</u>	<u>11</u>	<u>42</u>	<u>178</u>	<u>2</u>

Go to page: 1 Show rows: 50 1-6 of 6

# My Clients

- 1 The **My Clients** page is where you'll find information on your book of business with SilverScript. You can use this page to find information for one or all of your clients. You can also export information from this page to do further analysis in Excel.
- 2 **Organization** – Shows all FMO levels (1-3+), previously called Super NMO, NMO and Agency. Entering a name in this box will show you only that organization and its downlines, if any. The default view when loading this page shows all downlines and Ritter (includes what used to be Super NMO, NMO and Agency).
- 3 **Agent Name** – Enter an Agent you want to view. Enter the User ID for the Agent you would like to find in this box, then click Search.
- 4 **Click here to search by Medicare ID Number** -- Click the button, then in new screen, enter the MBI or HICN.
- 5 **Enrollments** -- Click any underlined value to see more detail.



## My Clients

Temporary Member ID Card

Data current as of: 05/25/2018 12:57:59 PM

Back

Print Export to Excel

Applicable Date	Effective Date	Agent ID	Agent Name	Applicant First Name	Applicant Last Name	G ID Number	Medicare Number	Plan	Status
05/24/2018	05/24/2018	TS	Test	Srikanth	Uppu	YQA11123	122222223D	CHOICE	Enrollment In Process
05/24/2018	05/24/2018	TS	Test	Srikanth	Uppu	YQA11124	122222223E	CHOICE	Enrollment Request Submitted To CMS - Awaiting CMS Feedback
05/24/2018	05/24/2018	TS	Test	Srikanth	Uppu	YQA11125	122222223F	CHOICE	Enrollment Request Submitted To CMS - Awaiting CMS Feedback
05/24/2018	05/24/2018	TS	Test	Srikanth	Uppu	YQA11126	122222223G	CHOICE	Enrollment Request Submitted To CMS - Awaiting CMS Feedback
05/24/2018	05/24/2018	TS	Test	Srikanth	Uppu	YQA11127	122222223H	CHOICE	Enrollment Request Submitted To CMS - Awaiting CMS Feedback
03/22/2018	03/22/2018	TS	Test	Srikanth	uppu	TPA000001	111222444A	CHOICE	Incomplete/pending/missing information
03/22/2018	03/22/2018	TS	Test	Srikanth	uppuSri	CPA000003	111222450C	CHOICE	Enrollment Request Approved By CMS & member enrolled
03/22/2018	03/22/2018	TS	Test	David	Wagner	YQA000002	111222333F	CHOICE	Disenrollment Approved by CMS & Member Disenrolled

**User Type**

Sort Ascending  
Sort Descending  
Remove Sort

Show rows where:

contains

And

contains

Filter Clear

# My Clients – Details

(continued from previous page)

- 1 Click any number in the table for details about the status of the enrollment.
- 2 Each section has a filter (highlighted in yellow). Clicking the filter allows you to drill down in any of the attributes contained in the column.
- 3 Simply type your search term, use the **contains** menus to combine terms or do a conditional search, then click **Filter** at the bottom.
- 4 If you want to undo your filter, click **Clear** to again show all the content of the column.



Print



Export to Excel

Application Date	Effective Date	Agent ID	Agent Name	Applica Name
<u>11/13/2012</u>	1/01/2013	07040000	Henry Tran	0000
<u>11/19/2012</u>	01/01/2013	00000000	Catherine Burns	0000
<u>12/05/2012</u>	01/01/2013	00000000	David Bishop	0000
<u>12/17/2012</u>	01/01/1753	00000000	William Page	000000
<u>12/22/2012</u>	01/01/2013	00000000	Anthony Cheng	0000
<u>12/25/2012</u>	01/01/2013	00000000	ALYXANDRA MADONCHUK	0000
<u>12/29/2012</u>	01/01/2013	00000000	SHARON LA	0000

# My Clients – Individuals

(continued from previous page)

- 1 If you want to review an individual enrollment from among your search results, click on the underlined Application Date in the first column.
- 2 That application will then open and you can review every field to find what you're looking for.

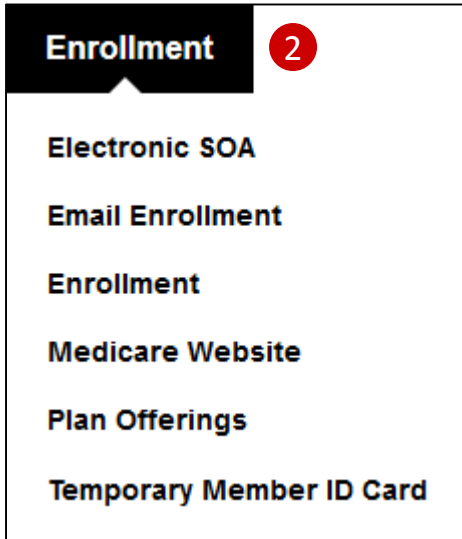
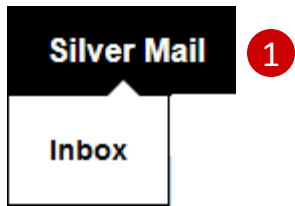
## My Clients

[Back](#)



Data current as of: 06/26/2018 12:17:13 AM

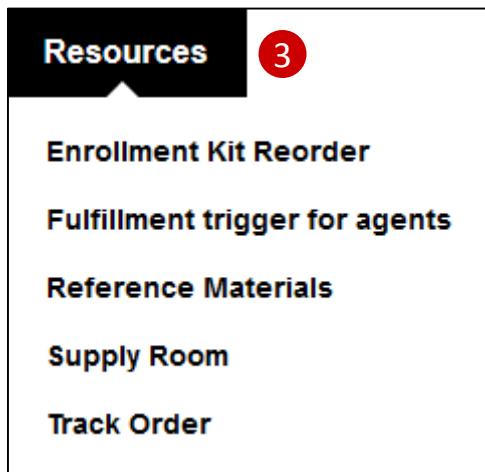
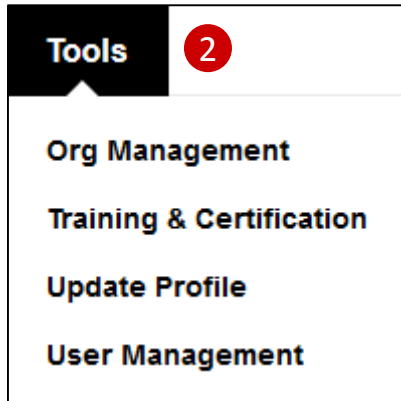
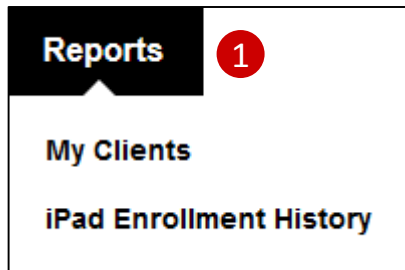
Name	Value
Confirmation Number	000000000000000000
Medicare Number	000000000000000000
Subscriber Id	000000000000000000
Agent Id	000000000000000000
CUID	0000
Member Status Code	D
Status Description	Enrollment Denied
Application Date	11/13/2012
Post Date	



# Admin Menus

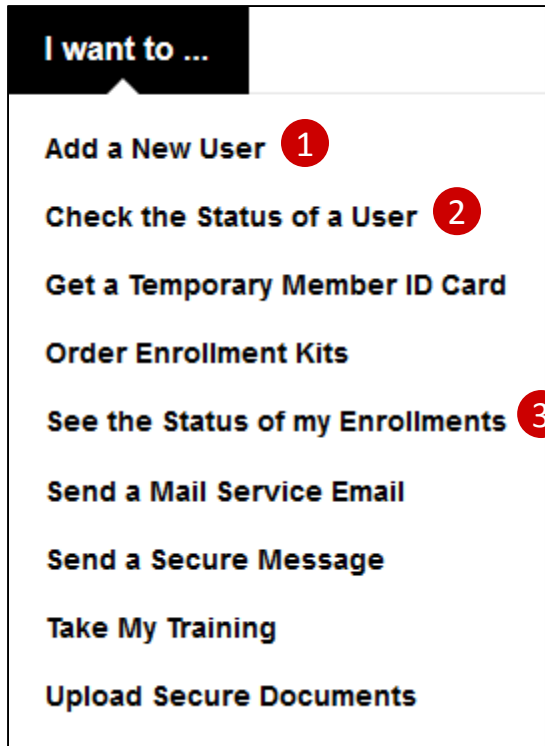
- 1 The **Silver Mail** menu provides a direct link to the secure messaging inbox.
- 2 The **Enrollment** menu contains all enrollment-related commands including a link to Medicare.gov, SilverScript plan offerings, and a downloadable temporary member ID card.

As an Admin, you may enter enrollments on behalf of agents Ready to Sell from this menu. If you're an Admin-Agent, you may enter them on behalf of yourself.



# Admin Menus

- 1 In the **Reports** menu, the My Clients link shows the status of all the client enrollment applications in your organization and your downline.
- 2 The **Tools** menu includes links to manage your organization and downline, and your users. You may also access the annual training and certification materials, and update your user profile.
- 3 The **Resources** menu points you to the Supply Room for enrollment materials, and the Reference Materials library. You may also order enrollment kits for your agents from this menu.



## Admin Menus

The **I want to ...** menu provides one-click access to your most frequently used activities on the Agent Portal.

Using only this menu, you could send:

- 1 Add a new user,
- 2 Check the status of a user,
- 3 Review your organization's SilverScript book of business.