

# Cal MediConnect Broker Portal Training



**L.A. Care**  
HEALTH PLAN®

*For All of L.A.*

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**ELEVATING  
HEALTHCARE**  
IN LOS ANGELES COUNTY  
— SINCE 1997 —

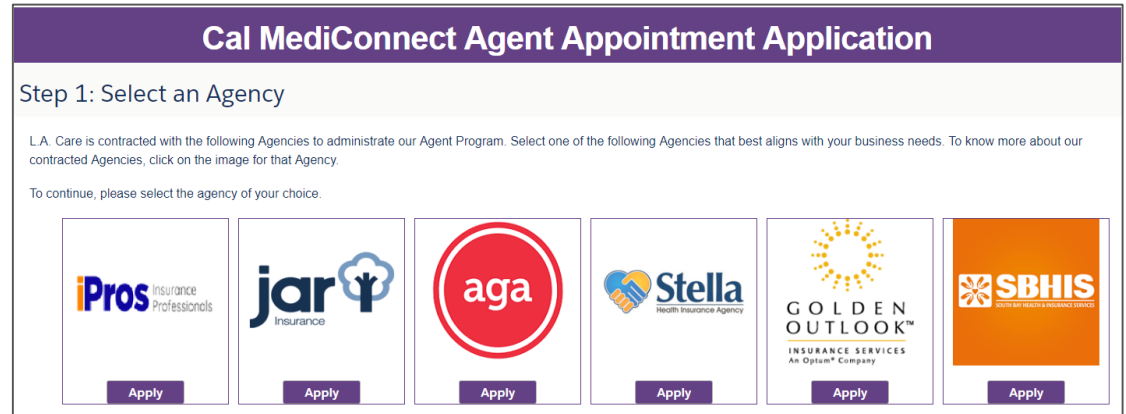
# Cal MediConnect Portal

- ❑ New Agent Experience
  - ❑ Agent Submits Application
  - ❑ General Agency Reviews Application
  - ❑ L.A. Care Admin Reviews and Accepts Application
- ❑ Online Training and Certification
  - ❑ Email Notifications
- ❑ Salesforce Login Instructions
- ❑ Agent and Agency Portal Features
  - ❑ Book of Business
  - ❑ Inquiries (Case Management)
  - ❑ Leads
  - ❑ Electronic Application
  - ❑ Cal MediConnect Marketing Materials
  - ❑ Personal Information Updates



# Agent submits application

1. Agent shall select the line of business
  - Cal MediConnect
  - L.A. Care Covered
2. Agent shall select one of the general agencies working with L.A. Care under this line of business and click on “Apply”



# Agent submits application - Continued

1. Agent shall complete all mandatory fields in the
  - Agent Information
  - Contact InformationAnd scroll down to upload documents and signature

1.

**Cal MediConnect Agent Appointment Application**

**Step 2: Provide Basic Information**

Now that you have selected Applied General Agency, please provide some basic information about yourself below.

**Agent Information:**

First Name *	<input type="text"/>	Last Name *	<input type="text"/>
License# *	<input type="text"/>	License Exp. Date *	<input type="text" value="mm / dd / yyy"/>
Languages Spoken *	<input type="text" value="English Spanish Arabic"/>	AHIP Expiration Date *	<input type="text" value="mm / dd / yyy"/>

**Contact Information:**

Phone Number 1 *	<input type="text"/>	Phone Number 2	<input type="text"/>
Email Address 1 *	<input type="text"/>	Email Address 2	<input type="text"/>
Fax Number	<input type="text"/>		

# Agent submits application - Continued

1. Attach a copy of a current California License and AHIP

1.

**Attachments:**

California Department of Insurance License *	<input type="button" value="Choose File"/> No file chosen <small>(File size limit is 10 MB)</small>
AHIP Certificate *	<input type="button" value="Choose File"/> No file chosen <small>(File size limit is 10 MB)</small>
CMC Training Certification	<input type="button" value="Choose File"/> No file chosen <small>(File size limit is 10 MB)</small>



# Agent submits application - Continued


1. Read the attestation and agreement
2. Open attachment, sign and date and then submit it

Plan (L.A. Care). Accordingly, I will have no claim for vacation or sick leave, retirement benefits, Social Security, Workers' Compensation benefits, disability or unemployment insurance benefits, or employee benefits of any kind. I further acknowledge that I do not have the authority to make statements or promises on behalf of L.A. Care; nor shall I have the authority to bind or commit L.A. Care to any form of obligation.

I hereby acknowledge that I am a Certified Insurance Agent with an active Life and Health License issued by the State of California and a valid American's Health Insurance Plans – Medicare Fraud Waste & Abuse Certification. Furthermore, I agree to be in compliance with the applicable laws and regulations, as well as, L.A. Care's contract with the Center for Medicare & Medicaid (CMS). This includes, but is not limited to, all of the regulations of the Affordable Care Act, the U.S. Department of Health and Human Services, California State and federal laws, rules, and regulations (including but not limited to those promulgated by the Coordinated Care Initiative), and applicable such as the Medicare Communication and Marketing Guidelines and the Marketing Guidelines for California Medicare-Medicaid Plans. In addition, this includes following specific guidelines for maintaining privacy and security, avoiding conflicts of interest and helping to prevent fraud, waste and abuse.

Furthermore, I understand that any violation of the laws and regulations, compliance standards, marketing guidelines, and related provisions, may result in disciplinary action and/or termination of writing privileges with L.A. Care. Likewise, I understand a violation of any applicable law, rule, or regulation on my part may also result in disciplinary action and/or termination of writing privileges with L.A. Care.

I agree that I shall not solicit individuals to enroll in L.A. Care Cal MediConnect until I receive written notification from L.A. Care that this Producer Appointment Application has been approved.

 Please click on the icon, read and agree to the declarations before submitting the form.\*

Date

**1.** (points to the PDF icon)

**2.** (points to the Date field)

**Submit** **Cancel**

NOTE: Application must be completed in a single session

# Agent submits application - Continued

1. Make sure you read and acknowledge the Agent Oversight Program
2. Click on the box below to confirm your agreement to the declaration and close

CMC\_Agreement\_Doc 1/14

## L.A. Care Cal MediConnect Plan Agent Oversight Program

**Agent Oversight Program**

L.A. Care Health Plan (L.A. Care) requires all contracted General Agencies and its Agents and any other downstream entities representing L.A. Care's Cal MediConnect (CMC) line of business to comply with our regulatory responsibilities including CMS regulations and guidance, specifically: the CMS Medicare Communication and Marketing Guidelines, the terms of our General Agency Contract Agreement and any applicable federal and state laws related to Medi-Cal and Medicare sales activities.

I have read and agree to the declarations above.\* [Close](#)

# Agent submits application - Successfully

- Agent shall receive the following notification if they have successfully completed all steps.

## Producer Appointment Application



### Thank you for your application!

Please allow 2 business days for your application to be processed.

If your application is approved, you will receive a welcome email along with login information for L.A. Care's Agent Portal. (You may need to check your spam or junk email folder.)

If you have any questions about your application, please contact:

**Agency Name:** Stella Health Insurance Agency  
**Phone:** (855) 866-8089  
**Email:** skharote-cognizant@lacare.org





# GA Reviews Application - Process

1. GA admin logs in (in this case Stella Insurance)
2. Click on Prospect Agents tab
3. Click on Agent Onboarding field list (in this case A-0527)

The screenshot displays the L.A. Care Health Plan system interface. At the top left is the L.A. Care Health Plan logo. A navigation menu includes Home, Leads, Cases, Marketing Materials, Reports, Dashboards, and Prospect Agents. A search bar is located at the top right. A user profile dropdown shows 'Stella GA Admin'. Below the navigation menu, there are sections for 'Recent Items' (00311716) and 'Quick Links' (View Book of Business, View Commissions). A 'Stella Agency Queue' dropdown is visible. The main content area features a table with columns: Action, Agent Onboarding..., Status, First Name, Last Name, License#, Email Address 1, Phone Number 1, and Languages Spoken. The table contains one row with the following data: Action: Edit, Agent Onboarding: A-0527, Status: Under Review by A..., First Name: Nivea, Last Name: Johnson, License#: 4876452, Email Address 1: nivea.johnson@ya..., Phone Number 1: 3108896745, Languages Spoken: English. Three numbered callouts are present: 1 points to the user profile, 2 points to the Prospect Agents tab, and 3 points to the A-0527 entry in the Agent Onboarding column.

Action	Agent Onboarding...	Status	First Name	Last Name	License#	Email Address 1	Phone Number 1	Languages Spoken
Edit	<a href="#">A-0527</a>	Under Review by A...	Nivea	Johnson	4876452	nivea.johnson@ya...	3108896745	English

# GA Reviews Application Process - Continued

When the profile opens up, GA admin shall validate the following

1. Verify that the license name match the first and last name on form, and that is **not** a corporate license.
2. Verify that AHIP is current, only current year.
3. Click on license validation link, to verify that license is also current with the California department of Insurance

The screenshot shows a user profile interface. At the top, there is a 'Custom Links' section with a link labeled 'License Validation' highlighted in yellow. An arrow labeled '3.' points to this link. Below this is an 'Edit' button. The main section is 'Notes & Attachments', which includes buttons for 'New Note', 'Attach File', and 'View All'. Below these buttons is a table with columns for 'Action', 'Type', 'Title', 'Last Modified', and 'Created By'. Two rows of attachments are visible. An arrow labeled '1.' points to the first row's title, 'CMC\_CaliforniaDepartmentofInsuranceLicense.jpg'. A second arrow labeled '2.' points to the second row's title, 'CMC\_AHIP Certificate.jpg'.

Action	Type	Title	Last Modified	Created By
<a href="#">Edit</a>   <a href="#">View</a>   <a href="#">Del</a>	Attachment	<a href="#">CMC_CaliforniaDepartmentofInsuranceLicense.jpg</a>	5/7/2020 9:31 AM	<a href="#">Agent Application Site Guest User</a>
<a href="#">Edit</a>   <a href="#">View</a>   <a href="#">Del</a>	Attachment	<a href="#">CMC_AHIP Certificate.jpg</a>	5/7/2020 9:31 AM	<a href="#">Agent Application Site Guest User</a>



# GA Reviews Application Process - Continued

GA admin's final step to change the status on agent's profile to **Approved by Agency**

1. Click on "Save" changes, and Prospect Agent form moves to LACARE admin's queue.

**1.**

Prospect Agent  
A-0527  
◀ Back to List: Prospect Agents

Notes & Attachments [2] | Training Tracker [1] | Prospect Agent History [1]

**Prospect Agent Detail**

Agent Onboarding Number	A-0527	Status	Under Review by Agency
First Name	Nivea	Owner	Stella Agency Queue <input type="button" value="[Change]"/>
Last Name	Johnson		
License#	4876452		
Account	Stella Health Insurance Agency		
Languages Spoken	English		
Product Details	Cal MediConnect		

Prospect Agent  
A-0527  
◀ Back to List: Prospect Agents

Notes & Attachments [2] | Training Tracker [1] | Prospect Agent History [1]

**Prospect Agent Detail**

Agent Onboarding Number	A-0527	Status	Approved by Agency <input type="button" value="↕"/>
First Name	Nivea	Owner	Stella Agency Queue <input type="button" value="[Change]"/>
Last Name	Johnson		
License#	4876452		
Account	Stella Health Insurance Agency		
Languages Spoken	English		
Product Details	Cal MediConnect		

**Note:** Once approved by general admin, L.A. Care admin will be triggered to complete the final steps for approval.

# L.A. Care Admin Reviews Application Process Continued

- Agent shall receive an email notification of the following

1. Their application was reviewed and was successfully completed. Assigning them their **Training Record ID**
2. Agent shall need to click on the training link to complete their certification training

**L.A. Care HEALTH PLAN**

**1.**

**Producer Appointment Application Notification**

**Thank you for your application!**

We have reviewed your application. You will need to successfully complete below mentioned training as next step.

Your Training Record ID: **TT-0000004**

Training URL: <http://www.lacaremarketing.org/Content/CMC/Certification/exam.html>

Thank you!  
Training Admin

**2.**

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f i t in y

# Agent Certification Training

**1.**

L.A. Care  
Cal MediConnect  
(Medicare-Medicaid Plan)

L.A. Care Cal MediConnect Plan Agent Oversight Program

## Training

Please review this training before taking the exam below.

**2020 Cal MediConnect Plan Certification Training**

**Start Training Now**

**Exam**

**2.**

Agent Full Name \*

Email \*

License Number

1. Which of the following choices is an accurate description of the eligibility requirements for L.A. Care's Cal MediConnect (CMC) Plan? \*

- [Blurred option]
- [Blurred option]
- [Blurred option]
- [Blurred option]

1. Click to start certification training.
2. Complete name, email address, and License before certification exam.



# L.A. Care's notification to agent - Passing

- When the agent has **successfully pass** the Cal MediConnect Certification exam.
- The agent shall receive the following Email notification letting them know that they have become an L.A. Care Health Plan agent.



 **L.A. Care**  
HEALTH PLAN®

**Welcome to L.A. Care Agent Portal!**

Hi Test2,

Welcome to L.A. Care Health Plan and congratulations on becoming a L.A. Care agent! We look forward to doing business with you and helping you grow your membership.

As the largest publicly operating plan in the U.S. with over 2 million members throughout Los Angeles County, L.A. Care focuses on the needs of all Angelenos. We are strongly committed to helping our agent community grow to its full capacity.



# L.A. Care's notification to agent – Passing (Continued)

- Agent shall also receive instruction on how create their L.A. Care Agent Portal Login.
  - L.A. Care Agent Portal available 24/7 to access to information, self-service capabilities, and more.

## L.A. Care Agent Portal Login

L.A. Care is pleased to provide the L.A. Care Agent Portal to its Agents, giving you 24/7 access to information, self-service capabilities, and more streamlined operations in a competitive marketplace. Login now to access the tools you need to succeed!

[Setup your Agent Portal account](#)

*Note: For future logins, please bookmark the [Agent Portal](#) and use this Username: [jarf238765@lacare.org](mailto:jarf238765@lacare.org)*

If you have any L.A. Care related questions, call us at (855) 248-7778 between 8 am and 5 pm on Monday through Friday or email us at [agentsupport@lacare.org](mailto:agentsupport@lacare.org). We will be pleased to assist you.

Finally, your General Agency will be responsible for all of your administrative needs and commission payments.

We wish you luck and much success during the selling season and beyond! Once again, welcome!

Regards,

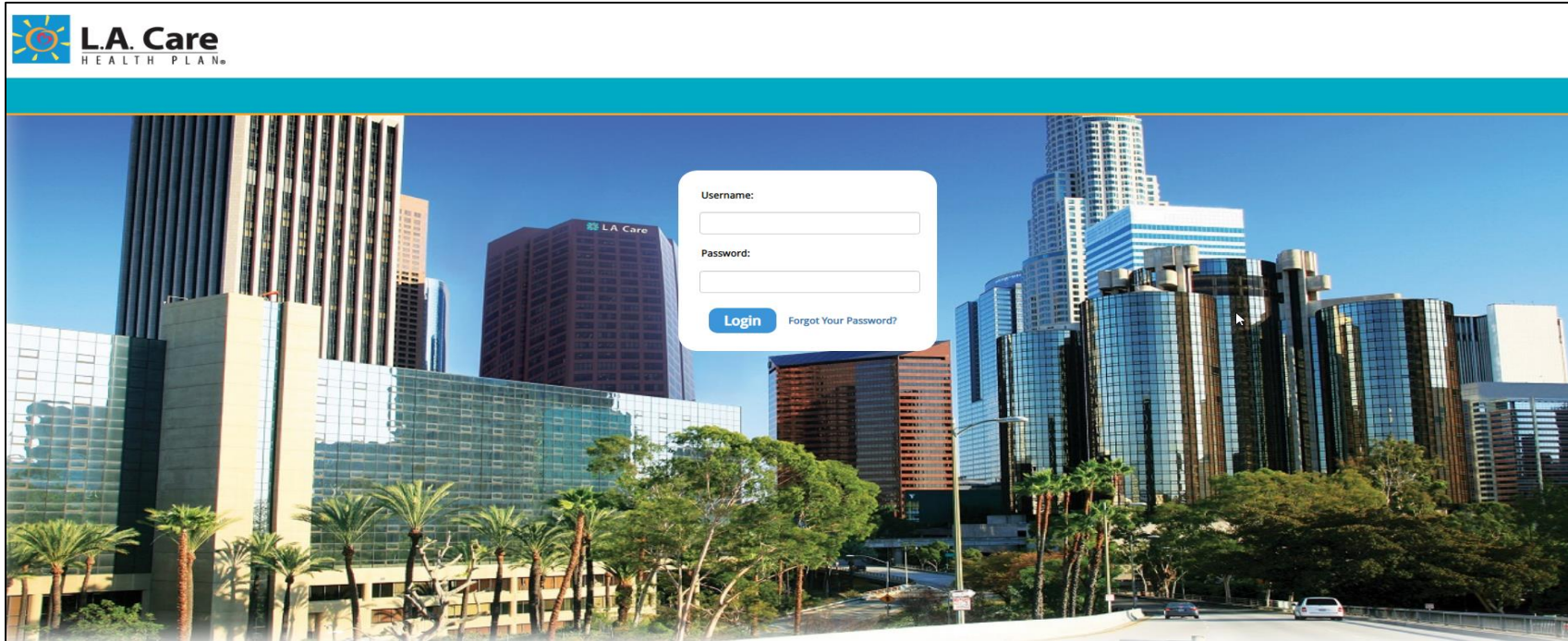
Agent Support Team  
*Sales & Marketing*

L.A. Care Health Plan, A Public Entity ©2000-2020



# Cal MediConnect Login Page

Agent long in page for L.A. Care Health Plan





# Portal Options

1. Agent shall select the line of business to access respective portal
  - Cal MediConnect
  - L.A. Care Covered
- If agent only sells one product it will automatically be redirect agent to the respective product line.



# Home Screen

## 1. How to access your Book of Business?

**L.A. Care**  
HEALTH PLANS

Sandbox: SYSINTG

Search... Search

Test JAR CMC Age... ▾

Home Leads Marketing Materials Reports Dashboards

## L.A. Care Agent Portal

Welcome Test JAR CMC Agent!

The L.A. Care Agent Portal streamlines the fundamentals of day-to-day health insurance sales and supports you in ways that save time and can boost your income, including giving you 24/7 access to information and increased self-service capabilities. Access the tools you need to succeed in a competitive marketplace below.

### Tools for Your Business

- LEADS ▶
- BOOK OF BUSINESS ▶**
- COMMISSIONS ▶
- MARKETING MATERIALS ▶
- INQUIRIES ▶
- PERSONAL INFORMATION ▶
- HELP & TRAINING ▶

1.

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# Book of Business

In the section of the books of business you will have access a 360 view of your membership

1. All Members
2. Active Members
3. Disenrollment Report

The screenshot shows the L.A. Care Agent Portal interface. At the top left is the L.A. Care Health Plan logo. To the right is a search bar and a user profile for Wendy Santoyo. Below the navigation bar is a purple header for the 'L.A. Care Agent Portal'. The main content area is titled 'Book of Business' and includes a 'Back to Home' link. Underneath, there is a section for 'Production Reports' with three items: 'All Members', 'Active Members', and 'Disenrollment Report'. Three numbered callout boxes (1, 2, and 3) are overlaid on the page with arrows pointing to the 'All Members', 'Active Members', and 'Disenrollment Report' links respectively. The footer contains copyright information and links to Privacy Statement, Security Statement, and Terms of Use.

# All Reports

A 360 perspective of your membership.

Report Generation Status: Complete

Report Options: Run Report Hide Details Printable View **Export Details**

Home Leads Cases Marketing Materials **Reports** Dashboards Prospect Agents

Book of Business - All Members

Report Generation Status: Complete

Report Options: Run Report Hide Details Printable View **Export Details**

Sorted By: Recent Type equals Member AND Product equals CMC

Agent License Number	Agent Name	Medi-Cal ID	Medicare ID	First Name	Middle Initial	Last Name	Date of Birth	Gender	Spoke Language	Mailing Address	Phone Number	Email Address	Effective Date	Disenrollment Date	Member Status
1100223	Test JAR CMC Agent For Ben	90120955E	-	MELISSA	-	MARTINEZ	9/4/1994	Female	SPANISH	-	8189122731	-	10/12/2017	-	Active
1100223	Test JAR CMC Agent For Ben	90120955E	-	MELISSA	-	MARTINEZ	9/4/1994	Female	SPANISH	-	8189122731	-	10/12/2017	4/30/2019	Active
1100223	Test JAR CMC Agent For Ben	99949099E	-	ISAAC	-	LEBES	10/23/2008	Male	ENGLISH	-	5624498676	-	10/12/2017	-	Active
1100223	Test JAR CMC Agent For Ben	99949099E	-	ISAAC	-	LEBES	10/23/2008	Male	ENGLISH	-	5624498676	-	10/12/2017	12/31/2018	Active
1100223	Test JAR CMC Agent For Ben	99949099E	-	ISAAC	-	LEBES	10/23/2008	Male	ENGLISH	-	5624498676	-	10/12/2017	1/31/2018	Active
1100223	Test JAR CMC Agent For Ben	9526857D	-	VICTORIA	A	BLUES	3/26/2001	Female	-	-	-	-	3/12/2018	-	Active
SLMD789	Linda Samson	92769525C	-	JOSEPH	-	SANCHEZ	2/16/1972	Male	-	-	5629005258	-	3/12/2018	-	Active
SLMD789	Linda Samson	92963044E	-	JANYTIAH	-	FRADUE	1/16/2005	Female	-	-	323925920	-	3/12/2018	-	Active
1100223	Test JAR CMC Agent For Ben	95215573D	-	HENRIEL	-	CASTILLO	1/15/1999	Male	-	-	4247031093	-	3/12/2018	-	Active
SLMD789	Linda Samson	9849081E	-	JENNA	-	FAUPEL	6/30/1993	Female	-	-	3158339465	-	3/12/2018	-	Active
SLMD789	Linda Samson	90420752A	1J25ERSY0K3	JOSE	M	MUNOZ	9/7/1984	Male	-	-	-	-	5/12/2019	-	Active
SLMD789	Linda Samson	91221274D	-	MASON	B	JONES	12/22/2018	Male	-	-	2137066181	-	12/22/2018	1/31/2019	Active
SLMD789	Linda Samson	91221274D	-	MASON	B	JONES	12/22/2018	Male	-	-	2137066181	-	6/12/2019	-	Active
SLMD789	Linda Samson	95877978D	3WC2N78TE03	BEATRIZ	-	CENTENO	2/16/1937	Female	-	-	9512299930	-	4/12/2019	4/30/2019	Active
SLMD789	Linda Samson	95877978D	3WC2N78TE03	BEATRIZ	-	CENTENO	2/16/1937	Female	-	-	9512299930	-	6/12/2019	-	Active
SLMD789	Linda Samson	9723439E	9CY9AK5FT62	DONMIGUEL	D	LIMBOZY	5/22/1948	Female	-	18427 STUDEBAKER RD APT 260, CERRITOS, CA 90703	714275252	-	4/12/2019	-	Active
1100223	Test JAR CMC Agent For Ben	93464444E	6OTW89PM22	ALTAGRACIA	-	LEONIS	6/27/1945	Female	-	-	8182500510	-	4/12/2019	-	Active
1100223	Test JAR CMC Agent For Ben	97363330D	-	IRMA	E	ZAPATA MARTINEZ	8/19/1990	Female	-	6710 HARVEHURST AVE APT B1, VAN NUYS, CA 91406	8189978291	-	5/12/2019	-	Active
1100223	Test JAR CMC Agent For Ben	97087903E	-	KENNETH	-	DEHAY	8/1/1963	Male	-	-	530355422	-	5/31/2019	Active	
1100223	Test JAR CMC Agent For Ben	97087903E	-	KENNETH	-	DEHAY	8/1/1963	Male	-	-	530355422	-	6/12/2019	-	Active
SLMD789	Linda Samson	95087978D	5XQDF190328	JAVIER	-	CENTENO	11/14/1933	Male	-	-	9512299930	-	4/12/2019	4/30/2019	Active
SLMD789	Linda Samson	95087978D	5XQDF190328	JAVIER	-	CENTENO	11/14/1933	Male	-	-	9512299930	-	6/12/2019	-	Active
0D2475	Autumn Sungmin Cho	91419537A	3F54F10KE87	ALISA	-	ALAJANYAN	10/1/1956	Female	-	-	8183923368	-	6/12/2019	-	Active
1100223	Test JAR CMC Agent For Ben	95373966F	-	KAREN	-	LUKESH	9/28/1977	Female	-	-	8188427886	-	3/12/2018	-	Active
2233445	Test CMC JAR Ben LUAT	25262807	-	MAGGIE	-	CHEN	4/21/1982	Female	-	-	6205489056	-	6/12/2019	-	Active
2233445	Test CMC JAR Ben LUAT	95732339E	-	WILLIAM B	-	MCCNELLY	10/29/1955	Male	-	-	9595999909	-	6/12/2019	-	Active
0D2475	Autumn Sungmin Cho	93778411G	-	CHEN	-	ZHANG	6/6/1987	Female	-	-	-	-	6/12/2019	-	Active
0D2475	Autumn Sungmin Cho	912746949D	-	JUDITH	A	MUNOZ	3/16/1992	Female	-	-	6267318604	-	6/12/2019	-	Active
SLMD789	Linda Samson	93134632C	-	CHRISTINE	-	LOVING	1/1/1962	Female	ENGLISH	-	530228424	-	12/31/2017	-	Active

- Abilities within Report:
- View all member by statuses
  - Filter by headers
  - Export raw data into Excel

Report Generation Status: Complete

Report Options: Run Report Hide Details Printable View **Export Details**

Export File Encoding: ISO-8859-1 (General US & Western European, ISO-LATIN-1)

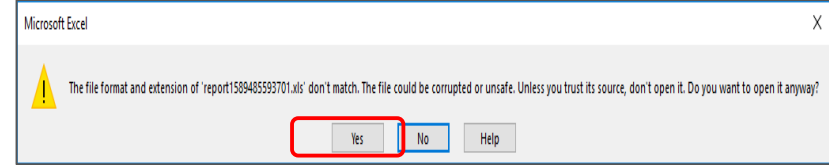
Export File Format: Excel Format .xls

**Export** One

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# Downloading the Report

You can export the data and filter as you need.



	A	B	C	D	E	F	G	H	I	J	K	L	M
1	Medi-Cal ID	Medicare ID	First Name	Middle Initial	Last Name	Date of Birth	Gender	Spoken Language	Mailing Address	Phone Number	Email Address	Effective Date	Disenrollment Date
2	90120595E		MELISSA		MARTINEZ	9/4/1994	Female	SPANISH		8189122731		10/1/2017	
3	99949089E		ISAAC		LINARES	10/23/2008	Male	ENGLISH		5624498676		10/1/2017	
4	95260857D		VICTORIA	A	IBARRA	3/26/2001	Female					3/1/2018	
5	95215573D		ISHMAEL		CASTILLO	1/15/1999	Male			4247031093		3/1/2018	
6	95373966F		KAREN		LUKESH	9/28/1977	Female			8186427886		3/1/2018	
7	93464444E	6QT0W89PM22	ALTAGRACIA		LEANOS	6/27/1945	Female			8182550510		4/1/2019	
8	97363230D		IRMA	E	ZAPATA MARTINEZ	9/19/1960	Female		6710 HAYVENHURST AVE APT 81, VAN NUYS, CA 91406	8189979291		5/1/2019	
9	97087003E		KENNETH		DEHAY	8/1/1963	Male			5303565422		6/1/2019	
10	92474518F	4H59W57UE17	WAYNE	G	PUGH	12/3/1955	Male	ENGLISH		8182487925		6/1/2016	
11													
12	Book of Business - Active Members												
13	Copyright (c) 2000-2020 salesforce.com, inc. All rights reserved.												
14	Confidential Information - Do Not Distribute												
15	Generated By: Test JAR CMC Agent For Ben 5/5/2020 10:23 AM												
16	LA Care Health Plan												
17													

# All Reports

A 360 perspective of your membership

Report Generation Status: Complete

Report Options: Run Report Hide Details Printable View **Export Details**

Home Leads Cases Marketing Materials **Reports** Dashboards Prospect Agents

Book of Business - All Members

Report Generation Status: Complete

Report Options: Run Report Hide Details Printable View **Export Details**

Sorted By: Recent Type equals Member AND Product equals CMC

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1100223	Test JAR CMC Agent For Ben	90120955E	-	MELISSA	-	MARTINEZ	9/4/1994	Female	SPANISH	-	8189122731	-	10/12/2017	-	Active
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1100223	Test JAR CMC Agent For Ben	95268570D	-	VICTORIA	A	BLONDI	3/26/2001	Female	-	-	-	-	3/12/2018	-	Active
SLMD789	Linda Samson	92769525C	-	JOSEPH	-	SANCHEZ	2/16/1972	Male	-	-	5629005258	-	3/12/2018	-	Active
SLMD789	Linda Samson	92963044E	-	JANYTIAH	-	FRADUE	1/16/2005	Female	-	-	3239925920	-	3/12/2018	-	Active
1100223	Test JAR CMC Agent For Ben	95215570D	-	HIMMEL	-	CASTILLO	1/15/1999	Male	-	-	4247031093	-	3/12/2018	-	Active
SLMD789	Linda Samson	98490818E	-	JENNA	-	FAUPEL	6/30/1993	Female	-	-	3158335645	-	3/12/2018	-	Active
SLMD789	Linda Samson	90428752A	1J25ERSY0K3	JOSE	M	MUNOZ	9/7/1984	Male	-	-	-	-	5/12/2019	-	Active
SLMD789	Linda Samson	91221274D	-	MASON	B	JONES	12/22/2018	Male	-	-	2137066191	-	12/22/2018	1/31/2019	Active
SLMD789	Linda Samson	91221274D	-	MASON	B	JONES	12/22/2018	Male	-	-	2137066191	-	6/12/2019	-	Active
SLMD789	Linda Samson	95877978D	3WC2N78TE03	BEATRIZ	-	CENTENO	2/16/1937	Female	-	-	9512299930	-	4/12/2019	4/30/2019	Active
SLMD789	Linda Samson	95877978D	3WC2N78TE03	BEATRIZ	-	CENTENO	2/16/1937	Female	-	-	9512299930	-	6/12/2019	-	Active
SLMD789	Linda Samson	97231439E	9CV9K50TFC2	DONMIGUEL	D	LIMBOZY	9/22/1949	Female	-	18427 STUDEBAKER RD APT 260, CERRITOS, CA 90703	714275252	-	4/12/2019	-	Active
1100223	Test JAR CMC Agent For Ben	93464444E	6OTW89PM22	ALTAGRACIA	-	LEONAS	6/27/1945	Female	-	-	8182550510	-	4/12/2019	-	Active
1100223	Test JAR CMC Agent For Ben	97363330D	-	IRMA	E	ZAPATA MARTINEZ	8/19/1990	Female	-	6710 HARVEHURST AVE APT B1, VAN NUYS, CA 91406	8189978291	-	5/12/2019	-	Active
1100223	Test JAR CMC Agent For Ben	97087903E	-	KENNETH	-	DEHAY	8/1/1963	Male	-	-	5303565422	-	5/31/2019	5/31/2019	Active
1100223	Test JAR CMC Agent For Ben	97087903E	-	KENNETH	-	DEHAY	8/1/1963	Male	-	-	5303565422	-	6/12/2019	-	Active
SLMD789	Linda Samson	95097978D	5XQDF190J28	JAVIER	-	CENTENO	11/14/1933	Male	-	-	9512299930	-	4/12/2019	4/30/2019	Active
SLMD789	Linda Samson	95097978D	5XQDF190J28	JAVIER	-	CENTENO	11/14/1933	Male	-	-	9512299930	-	6/12/2019	-	Active
0D2475	Autumn Sungmin Cho	91419537A	3F54P10KE87	ALISA	-	ALAJANYAN	10/1/1956	Female	-	-	8183992368	-	6/12/2019	-	Active
1100223	Test JAR CMC Agent For Ben	95373966F	-	KAREN	-	LUKESH	9/28/1977	Female	-	-	8188427886	-	3/12/2018	-	Active
2233445	Test CMC JAR Ben LUAT	25262807	-	MAGGIE	-	CHEN	4/21/1982	Female	-	-	6205489056	-	6/12/2019	-	Active
2233445	Test CMC JAR Ben LUAT	95773239E	-	MILLIAM	B	MCCNELLY	10/29/1955	Male	-	-	9599599909	-	6/12/2019	-	Active
0D2475	Autumn Sungmin Cho	93778411G	-	CHEN	-	ZHANG	6/6/1987	Female	-	-	-	-	6/12/2019	-	Active
0D2475	Autumn Sungmin Cho	91274094D	-	JENNIFER	A	MUNOZ	3/16/1992	Female	-	-	5267318604	-	6/12/2019	-	Active
SLMD789	Linda Samson	93134942C	-	CONRANCE	-	CHEN	1/21/1982	Male	ENGLISH	-	5267318604	-	12/31/2017	-	Active

## Abilities within Report:

- View all member by statuses
- Filter by headers
- Export report in a print ready version.

Report Generation Status: Complete

Report Options: Run Report Hide Details Printable View **Export Details**

Search: Wendy Samson

Export File Encoding: ISO-8859-1 (General US & Western European, ISO-LATIN-1)

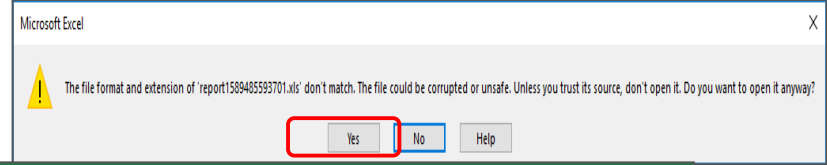
Export File Format: Excel Format .xls

**Export** Done

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# Print Ready Report

You have the ability to have print ready reports.



report1588699385465 - Excel

File Home Insert Page Layout Formulas Data Review View Nuance PDF Power Pivot Tell me what you want to do...

Clipboard Font Alignment Number Styles

Book of Business - Active Members

1 Book of Business - Active Members  
2  
3 **Generated By:**  
4 Test JAR CMC Agent For Ben  
5 LA Care Health Plan  
6 5/5/2020 10:23 AM  
7  
8  
9  
10 **Filtered By:**  
11 Show: All contacts  
12 Record Type equals Member  
13 AND Active Member Flag equals True  
14 AND Product equals CMC

Medi-Cal ID	Medicare ID	First Name	Middle Initial	Last Name	Date of Birth	Gender	Spoke Language	Mailing Address	Phone Number	Email Address	Effective Date	Disenrollment Date
90120595E		MELISSA		MARTINEZ	9/4/1994	Female	SPANISH		8189122731		10/1/2017	-
99949089E		ISAAC		LINARES	10/23/2008	Male	ENGLISH		5624498676		10/1/2017	-
95260857D		VICTORIA	A	IBARRA	3/26/2001	Female					3/1/2018	-
95215573D		ISHMAEL		CASTILLO	1/15/1999	Male			4247031093		3/1/2018	-
95373966F		KAREN		LUKESH	9/28/1977	Female			8186427886		3/1/2018	-
93464444E	6QTOW89PM22	ALTAGRACIA		LEANOS	6/27/1945	Female			8182550510		4/1/2019	-
97363230D		IRMA	E	ZAPATA MARTINEZ	9/23/1960	Female		6710 HAYVENHURST AVE APT 81, VAN NUYS, CA 91406	8189979291		5/1/2019	-
97087003E		KENNETH		DEHAY	8/1/1963	Male			5303565422		6/1/2019	-
92474518F	4H59W57UE17	WAYNE	G	PUGH	12/3/1955	Male	ENGLISH		8182487925		6/1/2016	-

25 **Grand Totals (9 records)**  
26  
27  
28 Confidential Information - Do Not Distribute  
29 Copyright (c) 2000-2020 salesforce.com, inc. All rights reserved.

# How to Submit an Inquiry (Case)

The screenshot displays the L.A. Care Agent Portal interface. At the top left is the L.A. Care Health Plans logo. To the right is a search bar and a user identifier 'Sandbox: SYSINTG'. Below the search bar is a navigation menu with 'Home', 'Leads', 'Marketing Materials', 'Reports', and 'Dashboards'. A blue banner reads 'L.A. Care Agent Portal'. Below the banner, a welcome message says 'Welcome Test JAR CMC Agent!' followed by a paragraph of text. A grey bar titled 'Tools for Your Business' contains seven buttons: 'LEADS', 'BOOK OF BUSINESS', 'COMMISSIONS', 'MARKETING MATERIALS', 'INQUIRIES', 'PERSONAL INFORMATION', and 'HELP & TRAINING'. The 'INQUIRIES' button is highlighted with a white box containing the number '1' and an arrow pointing to it. At the bottom, there is a copyright notice: 'Copyright © 2000-2020 salesforce.com, inc. All rights reserved. | [Privacy Statement](#) | [Security Statement](#) | [Terms of Use](#)'.

1. Click on “Inquiries” to start the transfer process



# Type of Inquiries

- Agent Inquiries consist of:
  - Commission
  - Member Eligibility
  - Agent License
  - Agent Status Update
  - Application Status Update
  - Benefit Question
  - Leads
  - Member Material
  - Onboarding
  - Recertification
  - Personal Information Update
  - Provider Information
  - License Expiration/Grace Period
- Inquiries History
- Agency Transfer
- Agent Off boarding

The screenshot displays the L.A. Care Health Plan website interface. At the top, the logo for L.A. Care Health Plan is visible, along with a navigation menu containing 'Home', 'Leads', 'Marketing Materials', 'Reports', and 'Dashboards'. Below the navigation is a purple header bar. The main content area is titled 'Inquiries' and includes a sub-section for 'Agent Inquiries'. This section provides instructions on how to submit inquiries and lists two categories: 'License Questions' and 'Others'. A blue button labeled 'Agent Inquiry' is provided for submission. Below this, the 'Inquiries History' section offers a blue button labeled 'Inquiries History' to view all open and closed inquiries. The 'Agency Transfer' section includes a blue button labeled 'Agency Transfer' for submitting a request. Finally, the 'Agent Offboarding' section features a blue button labeled 'Agent Offboarding' for submitting a request. The entire interface is framed by a thin black border.

# Inquiry Submission

Case Edit  
New Case

Submit Save & New Cancel

**Case Information**

Type --None--  
Other Type --None--  
Description Commission Inquiry  
Member Eligibility  
License Question  
Additional Details Other  
Agent Status Update  
Application Status Update  
Benefit Question  
Leads  
Member Materials  
Onboarding  
Recertification  
Personal Information Update  
Provider Information  
License Expiration /Grace Period

Case Origin Web  
Status New  
Priority Medium  
Case Owner Test JAR CMC Agent For Ben

Subject

**Other Information**

Contact Name Test JAR CMC Agent For Ben

Submit Save & New Cancel

Case Origin --None--  
Status --None--  
Priority Email  
Phone  
Web  
Case Owner Lynda Samson

Status New  
Priority New  
In Progress  
Closed  
Case Owner Lynda Samson

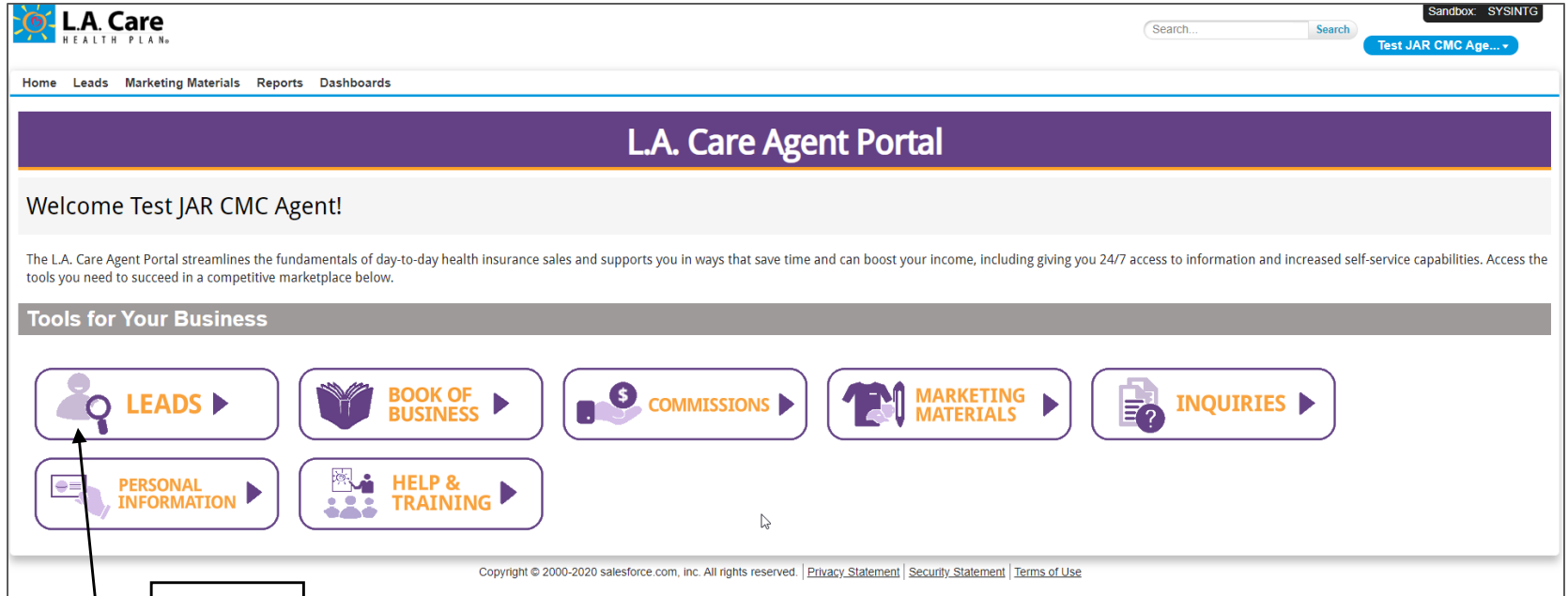
Priority --None--  
Case Owner --None--  
High  
Low  
Medium

1. Select the from the drop down option for inquiry type
2. Case Origin
3. Status
4. Priority



# Leads

## 1. How to access your leads?



The screenshot displays the L.A. Care Agent Portal interface. At the top left is the L.A. Care Health Plan logo. To the right is a search bar and a user profile dropdown labeled 'Test JAR CMC Age...'. Below the navigation bar, a purple banner reads 'L.A. Care Agent Portal'. A welcome message follows: 'Welcome Test JAR CMC Agent!'. A paragraph of text describes the portal's purpose. Below this is a 'Tools for Your Business' section with seven buttons: LEADS, BOOK OF BUSINESS, COMMISSIONS, MARKETING MATERIALS, INQUIRIES, PERSONAL INFORMATION, and HELP & TRAINING. The 'LEADS' button is highlighted with a black box and a white number '1.', with an arrow pointing to it from a larger box below the screenshot. The footer contains copyright information and links to Privacy, Security, and Terms of Use.

**L.A. Care**  
HEALTH PLAN

Search... Search

Sandbox: SYSINTG

Test JAR CMC Age... ▾

Home Leads Marketing Materials Reports Dashboards

## L.A. Care Agent Portal

Welcome Test JAR CMC Agent!

The L.A. Care Agent Portal streamlines the fundamentals of day-to-day health insurance sales and supports you in ways that save time and can boost your income, including giving you 24/7 access to information and increased self-service capabilities. Access the tools you need to succeed in a competitive marketplace below.

### Tools for Your Business

- LEADS ▶
- BOOK OF BUSINESS ▶
- COMMISSIONS ▶
- MARKETING MATERIALS ▶
- INQUIRIES ▶
- PERSONAL INFORMATION ▶
- HELP & TRAINING ▶

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1.

# Leads Assignment

The screenshot displays the L.A. Care Health Plan interface. At the top left is the L.A. Care logo. The navigation bar includes 'Home', 'Leads', 'Marketing Materials', 'Reports', and 'Dashboards'. A search bar and a 'Test JAR CMC Age...' button are on the right. The 'Recent Items' list on the left includes 'Test JAR CMC Agent For Ben MELISSA MARTINEZ', 'Jack In The Box', 'John D. Doe II', 'Matzkind', and 'MAGDALENA MACARIO PELICO'. The 'LEADS Home' section shows a 'View:' dropdown set to 'My Leads'. Below this is a table of leads with columns: Name, Owner Name, Lead Status, Product Code, Eligibility Status, Spoken Language, Phone, Email, Zip Code, Created Date, and Last Modified Date. The table contains four rows of lead data. At the bottom left, the 'Quick Links' section includes 'Update Personal Information', 'Formulary Lookup', and 'Provider Directory'. The footer contains copyright information and links for Privacy Statement, Security Statement, and Terms of Use.

Name	Owner Name	Lead Status	Product Code	Eligibility Status	Spoken Language	Phone	Email	Zip Code	Created Date	Last Modified Date
Matzkind	Test JAR CMC Agent For Ben	Open	CMC			(213) 222-3333			3/5/2020 2:33 PM	3/6/2020 11:20 AM
Matzkind	Test JAR CMC Agent For Ben	Open	CMC			(213) 111-2222			3/5/2020 2:37 PM	3/5/2020 2:42 PM
John D. Doe II	Test JAR CMC Agent For Ben	Open	CMC			213213123123			4/24/2020 3:09 PM	4/24/2020 3:09 PM
Jack In The Box	Test JAR CMC Agent For Ben	Open	CMC			(805) 765-4321			3/6/2020 3:41 PM	3/6/2020 3:43 PM

1. Lead can be assigned by your agency or directly by L.A. Care Health Plan.
2. Quick Links:
  - Update Personal Information
  - Formulary Lookup
  - Provider Directory
3. Click on lead to update lead profile

# Lead Update

Lead  
Matzkind

Click to add topics: ?

Open Activities (0) | Providers Information (0)

**Lead Detail** Edit Assign Owner

**Contact Information**

Name	Matzkind	Phone	(213) 222-3333
Medicare Name		Phone 2	
Email		Phone 3	
Address Line 1		Mailing Address Line 1	
Address Line 2		Mailing Address Line 2	
City		Mailing Address City	
State		Mailing Address State	
Zip Code		Mailing Address Zip Code	
Comment		Next Appointment Date	

**Demographic Information**

DOB		Age	
Gender		Social Security Number	
Spoken Language		Medi-Cal Number	
Written Language		HIC Number	
Alternative Format		MBI Number	
Authorized Representative Name		Emergency Contact Full Name	
Authorized Rep's Relationship		Emergency Contact Relationship	
Authorized Rep's Phone		Emergency Contact Phone	
Authorized Rep's Language		Emergency Contact Language	

**Lead Management**

Product	Cal MediConnect	Lead Status	Open
Lead Source		Eligibility Status	
Referral Method		Eligibility Status Detail	
DTC ID		Current Owner	Test JAR CMC Agent For Ben

Once you have contact the prospect update the “Lead Management” portion of the profile.

1.

# Electronic Application

1.

**L.A. Care Agent Portal**

Welcome Test JAR CMC Agent! [Electronic Application](#)

The L.A. Care Agent Portal streamlines the fundamentals of day-to-day health insurance sales and supports you in ways that save time and can boost your income, including giving you 24/7 access to information and increased self-service capabilities. Access the tools you need to succeed in a competitive marketplace below.

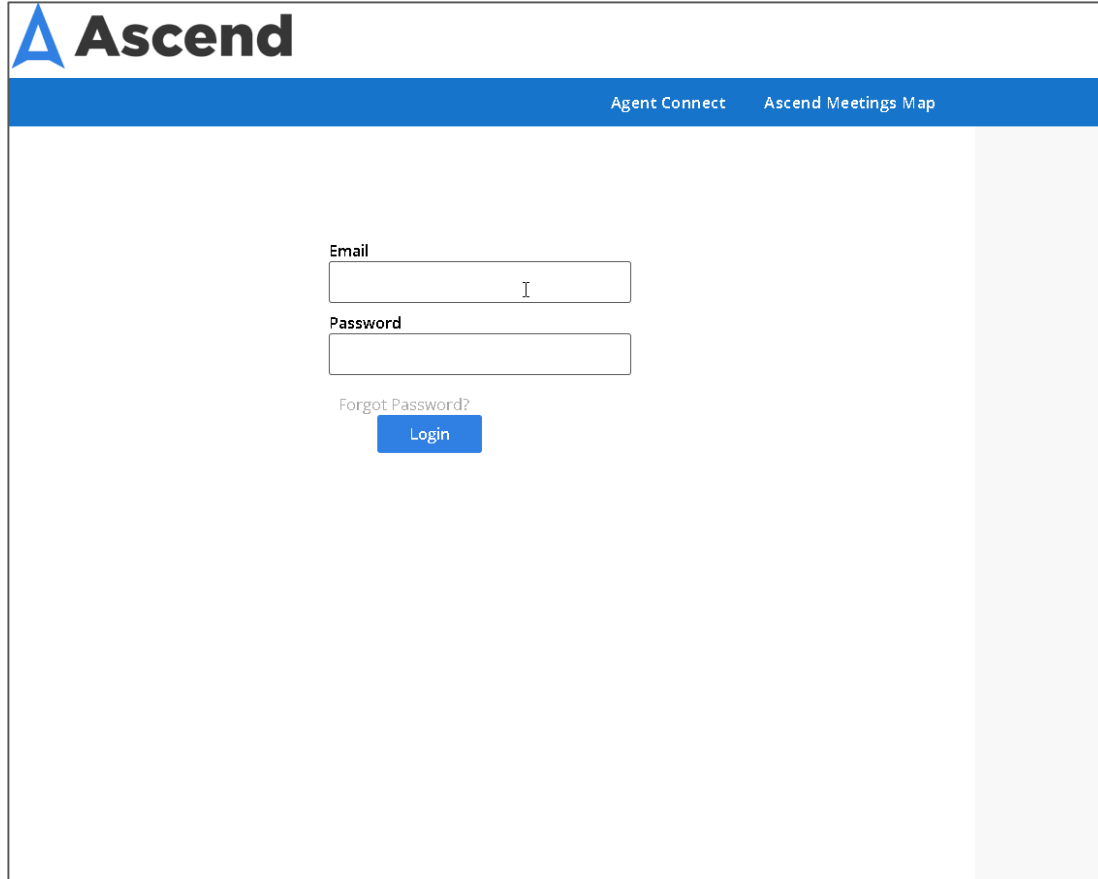
**Tools for Your Business**

- LEADS**
- BOOK OF BUSINESS**
- MARKETING MATERIALS**
- INQUIRIES**
- PERSONAL INFORMATION**
- HELP & TRAINING**

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1. Click on the “Electronic Application” link to start your Cal MediConnect online application

# Electronic Application



The screenshot shows the Ascend login interface. At the top left is the Ascend logo, consisting of a blue triangle followed by the word "Ascend" in bold black text. To the right of the logo is a blue navigation bar containing the links "Agent Connect" and "Ascend Meetings Map". The main content area is white and contains a login form. The form has two input fields: "Email" and "Password". Below the password field is a link for "Forgot Password?". At the bottom of the form is a blue "Login" button.

**Ascend**

Agent Connect Ascend Meetings Map

Email

Password

[Forgot Password?](#)

[Login](#)

<https://arm.ascendproject.com>

Log in with your credential to access your L.A. Care Cal MediConnect Electronic Application



# Marketing Material

**L.A. Care Agent Portal**

Welcome Test JAR CMC Agent! [Electronic Application](#)

The L.A. Care Agent Portal streamlines the fundamental insurance sales and supports you in ways that save time and can boost your income, including giving you 24/7 access to information and increased self-service capabilities. Access the tools you need to succeed in this competitive marketplace below.

**Tools for Your Business**

- LEADS ▶
- BOOK OF BUSINESS ▶
- MARKETING MATERIALS ▶**
- INQUIRIES ▶
- PERSONAL INFORMATION ▶
- HELP & TRAINING ▶

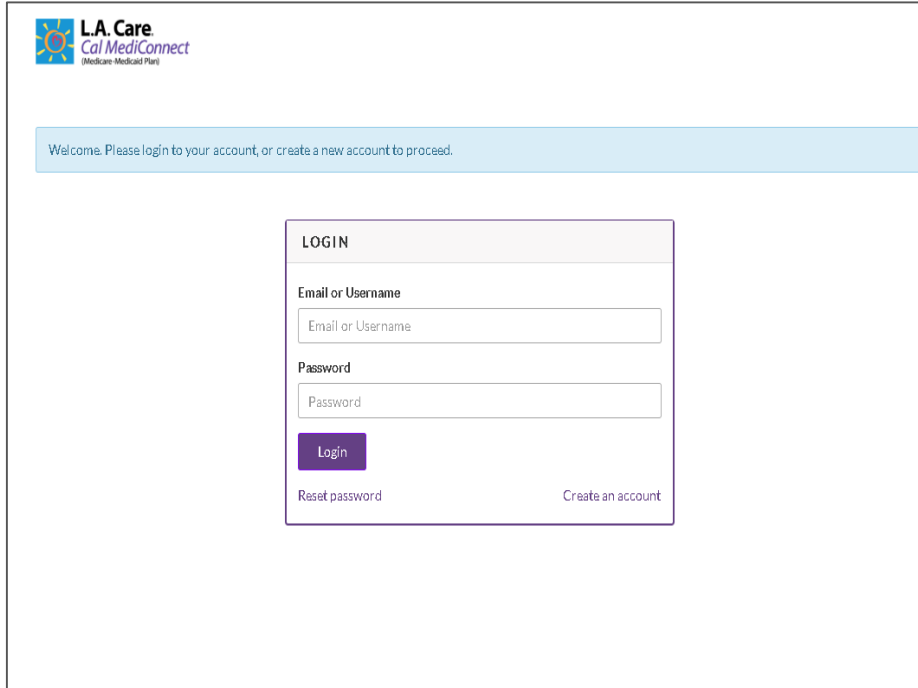
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1. Click on the “Electronic Application” link to start your Cal MediConnect online application



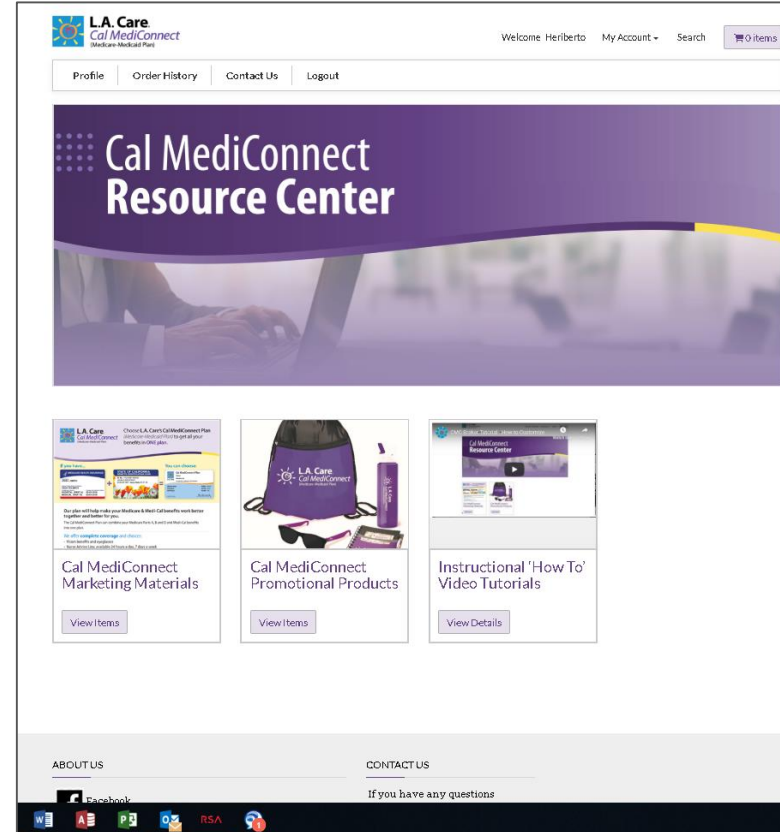


# Marketing Material



The screenshot shows the login interface for the L.A. Care Cal MediConnect portal. At the top left is the logo with the text "L.A. Care Cal MediConnect (Medicare-Medicaid Plan)". A light blue banner contains the message: "Welcome. Please login to your account, or create a new account to proceed." Below this is a "LOGIN" form with two input fields: "Email or Username" and "Password". A purple "Login" button is positioned below the password field. To the left of the button is a "Reset password" link, and to the right is a "Create an account" link.

Log in with your credential to access your L.A. Care Cal MediConnect Marketing Materials  
[lacarecmc.com](http://lacarecmc.com)



The screenshot displays the homepage of the Cal MediConnect Resource Center. The top navigation bar includes the logo, a welcome message for "Heriberto", and links for "My Account", "Search", and "Items". A secondary navigation bar contains "Profile", "Order History", "Contact Us", and "Logout". The main header features a large purple banner with the text "Cal MediConnect Resource Center" and a background image of hands typing on a laptop. Below the banner are three featured product cards: "Cal MediConnect Marketing Materials", "Cal MediConnect Promotional Products", and "Instructional 'How To' Video Tutorials". Each card includes a "View Items" button. The footer contains "ABOUT US" and "CONTACT US" sections, with a note "If you have any questions" and a Facebook icon. A Windows taskbar is visible at the bottom of the browser window.

Thank you!

# Q&A Session

