



# Agent Quick Start Guide

## 2021 Medicare Advantage Prescription Drug Plans

*This guide applies only to Clear Spring Health enrollment in CO, IL, NC and VA.  
For Eon Health business in GA and SC, visit [www.eonhealthplan.com](http://www.eonhealthplan.com).*

**T**his guide is for agents and agencies who are contracted with Clear Spring Health to sell our 2021 Medicare Advantage Prescription Drug product.

Once you receive confirmation from us that you've been appointed and you receive your unique Agent Writing Number, you are ready to start selling!

### We're Here to Help

To contact us for Agent Support:

**Call toll-free:** 888-296-2506

**Email:** [brokers@clearspringhealthcare.com](mailto:brokers@clearspringhealthcare.com)

**Visit us online:** [www.clearspringhealthcare.com](http://www.clearspringhealthcare.com)

**Mail:** Clear Spring Health, P.O. Box 3206,  
Scranton, PA 18505

### First Step: Create an Online Account Using Our Agent Portal

Be sure to create an account on our Agent Portal at [www.clearspringhealthcare.com](http://www.clearspringhealthcare.com) using the writing number provided in your welcome letter email. Your online account is your direct line of communication to Clear Spring Health and will allow you to track the status of applications, check commissions, order marketing materials and more.

#### —TIP—

*Keep your Agent Writing Number handy.  
You'll need to provide it on every enrollment application you submit.*

### How to Submit Enrollment Applications

There are four ways to submit enrollment applications. **Electronic enrollment is preferred**, because you can immediately begin tracking its status via the Agent Portal.

Paper enrollment applications are included in our printed Enrollment Kit, along with all other required forms.

In addition to completing an electronic or paper enrollment application, you are required to collect a signed Scope of Sales Appointment Confirmation Form (SOA) from every client. Regardless of what method you choose, **don't send the SOA forms to us**; keep these on file for 10 years, as required by the Centers for Medicare and Medicaid Services (CMS).

## How to Submit Enrollment Applications (continued)

### METHOD 1 (Preferred): Agent Submits Electronic Application



Under this method, you, as agent, collect a signed paper application (and SOA form) from your client or his/her authorized representative, either in person or by mail.

You then use the paper app to

complete our online application form at [www.clearspringhealthcare.com](http://www.clearspringhealthcare.com) on his/her behalf.

When you submit the application, you'll receive immediate confirmation, along with a tracking number. Enrollment is not finalized until CMS approves it. You'll be able to track the application's status through the Agent Portal.

#### —TIPS—

**“Who Is Enrolling?” Section** —If the paper application was signed by your client, check “I Am Enrolling for Myself.” If the paper application was signed by the client's authorized representative, check “I Am Enrolling for Someone Else.”

**Agent Section** — Be sure to complete this section, providing your name, Agent Writing Number, etc. Complete the attestation at the end of completing the electronic application. By checking this box you will be attesting that the enrollment meets all the CMS marketing guidelines

### METHOD 2 (Preferred): Client Submits Electronic Application



Under this method, your client completes the online application in your presence (in person or on the phone). No paper application is required in this event; however, a signed SOA is still required for your records.

When your client submits the application, he/she will receive immediate confirmation, along with a tracking number. Enrollment is not finalized

until CMS approves it. You'll be able to track application's status through the Agent Portal.

#### —TIPS—

**Agent Section** — Your client must complete this section on your behalf, checking the box that says, “I am working with an insurance agent” and providing your name and Writing Number.

### METHOD 3: Agent Mails the Signed Paper Application



Under this method, you obtain the completed, signed enrollment application and SOA and mail the top copy of the enrollment application and pre-enrollment checklist to us at:

**Clear Spring Health, P.O. Box 3206, Scranton, PA 18505**

Once the application has been received and processing begins, you can follow its status via the Agent Portal.

### METHOD 4: Agents Faxes the Signed Paper Application



Under this method, you follow the same steps as in Method 3, except that you fax the completed enrollment application and pre-enrollment checklist to Clear Spring Health at **fax # 855-382-6679**.

Once the application has been received and processing begins, you can follow its status via the Agent Portal.

## What Happens After an App Is Submitted?

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Once an application is submitted to us, we forward it to CMS. (Enrollment isn't finalized until CMS approves it.) Within 10 calendar days after we receive confirmation of enrollment by CMS (or by last day of month prior to effective date, whichever is later), the enrollee will receive a welcome kit from us, including Evidence of

Coverage, an ID card, provider and pharmacy directories and more.

For all January 1, 2021 effective dates, welcome kits will be mailed around December 15th for delivery by January 1st.

## How to Handle Other CMS Required Enrollment Forms

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In addition to the application and SOA forms, our enrollment kit includes a number of other CMS required forms, including:

- LIS Premium Summary
- Non-Discrimination Notice
- Multi Language Insert
- Summary of Benefits
- Enrollment Recap/Receipt
- Pre-Enrollment Checklist

Review these with your client, and once you tear off the top copy of the application, SOA and pre-enrollment checklist forms, advise your client

to keep the remaining Enrollment Kit for his/her records.

If you are on the phone with your client while he/she complete the online application form, you can review online versions of these forms with your client.

### —TIP—

***2021 Plan Enrollment Recap/Receipt** — Please complete this with your client to ensure he/she understands the plan basics and leave it with your client for recordkeeping purposes.*

## How to Check an Application's Status

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Once an application is submitted, you can track its status via the Agent Portal. Log into your online account and click "Track App Status." Remember, you can track electronic applications

immediately after submissions. For mailed or faxed applications, you will need to wait several days until the application is received and processed before you'll find it online.

## How to Order Marketing Materials

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Once you're appointed by Clear Spring Health, we will mail you an initial supply of Consumer Brochures and Enrollment Kits for your state, along with other supplies. If you need to order

additional materials, you can do so via the Agent Portal by logging into your online account and clicking "Order Supplies."

## How to Check Your Commissions

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Commissions are paid on a monthly basis. You can check your commission statements online anytime via the Agent Portal. Log into your

online account and click "My Commissions." AEP commission will be paid in January 2021.

**Thank you for choosing to represent Clear Spring Health!**

Please contact us if you have any questions.