



Onboarding

Producer Portal

July 2019



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Introduction

The onboarding module allows you to submit your annual certification for our Medicare Advantage plans. Once you complete this process, you are Ready to Sell (RTS) for the plan year.

Onboarding is available from the dashboard when you're logged into the portal.

Login

Enter your Email Address or NPN and your password, and then click Sign In.

Login to your portal

Email Address or NPN

[Forgot Login ID?](#)

Password

[Forgot Password?](#)

Sign In

The blue box will let you know whether you are ready to sell; if you're not yet certified for the plan year, you can get started now.

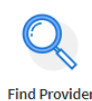
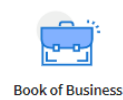
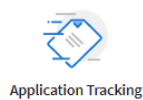
Click **Start Onboarding** to begin.

1 It looks like you aren't yet ready to sell ✕

Before you can begin selling Lumeris Advantage plans, you need to get certified as a producer.

[Start Onboarding](#)

Main Menu



Confirm Your Identity

If you've been certified for a prior year, some information will populate for you during the onboarding process. The first screen you encounter (shown below) will list what you need to complete the process.

Enter your social security number (SSN) and any other information that is not pre-populated.

Check the box to authorize and click **Get Started** to move forward.

Welcome to Lumeris' Producer Onboarding!

This module will assist you in your annual certification for our Medicare Advantage plans. You must complete this process to be deemed Ready to Sell (RTS) for the plan year. If you are unable to complete this process in one sitting, you can leave at any time and your progress will be saved. Upon completion of all the requirements, you will receive an email confirmation that you are RTS. Please do not market or sell any plans until you receive RTS confirmation from us.

To get started, please confirm the information below and enter your Social Security number. We will use it to confirm your identity and request your Producer Database (PDB) Report so we can gather your information from the National Insurance Producer Registry (NIPR).

If you have any issues, please reach out to Producer Support at the number above or email [Producer Support](#). We appreciate your partnership and look forward to a productive selling season!

What you'll need to complete your onboarding:

- ✓ Social Security Number
- ✓ Errors & Omissions Insurance Policy Information
- ✓ AHIP Completion Certificate ([Learn More Here](#))
- ✓ W9 Information
- ✓ Banking Information (for payouts)
- ✓ 30-45 Minutes to Complete Product Training

To get started, we'll gather your information from the National Producer Registry (NIPR):

National Producer Number (NPN)

Last Name

Social Security Number (SSN)

I authorize Lumeris to request my PDB report from NIPR

[Get Started](#)

From this point forward, you will continue filling out the form. Each step must be completed before you can move forward.



General Information

In this first section of the form, complete any required fields (some will populate based on prior year certification if applicable). Click **Continue and Save** to move forward.

Producer Onboarding

Please complete the form below. All fields are required unless marked optional. You must complete each step of the process before you can advance to the next one. Each completed step will show a green check mark. Click "Continue and Save" after you complete each step to save your progress in case you need to leave the site and return later.

- General Information
- Contact Information
- Licenses
- Background Check
- E&O Insurance
- AHIP
- Compliance Policies
- Sales Policies
- W-9 Form
- Banking Information
- Product Training
- Sign Documents

General Information

Please verify the information we have on file for you:

First Name

Middle - optional

Last Name

Suffix - optional

Date of Birth

Format: 08/22/1980

NPN

Primary Contact Email

Secondary Email - optional

Direct Upline
> Midwest Insurance

[Continue and Save](#)

Contact Information

Complete any required fields (some will populate based on prior year certification if applicable). Click **Continue and Save** to move forward.

- General Information
- Contact Information
- Licenses
- Background Check
- E&O Insurance
- AHIP
- Compliance Policies
- Sales Policies
- W-9 Form
- Banking Information
- Product Training
- Sign Documents

Contact Information

Please verify the contact information we have on file for you:

Primary Address

Address Line 1

Address Line 2 - optional

City

State

ZIP Code

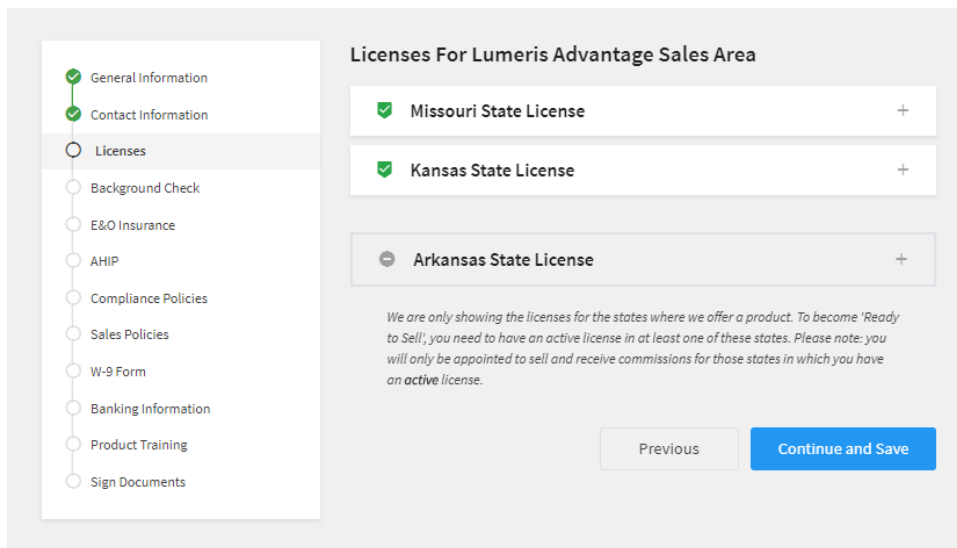
Business Phone Number

Would you like to add a separate mailing address?
 Yes No



Licenses

Existing licenses that correspond with states where we currently offer products will display on this page.



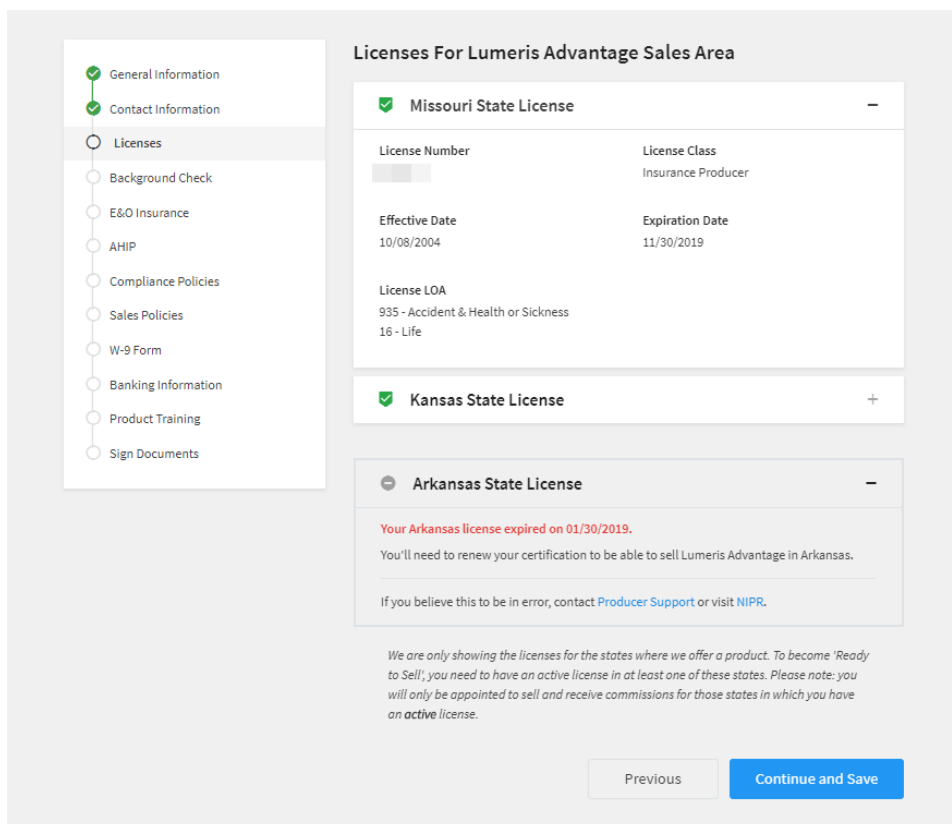
Licenses For Lumeris Advantage Sales Area

- ✓ Missouri State License +
- ✓ Kansas State License +
- ✖ Arkansas State License +

We are only showing the licenses for the states where we offer a product. To become 'Ready to Sell', you need to have an active license in at least one of these states. Please note: you will only be appointed to sell and receive commissions for those states in which you have an active license.

Previous [Continue and Save](#)

Click the plus signs next to a license listing to see the details.



Licenses For Lumeris Advantage Sales Area

- ✓ Missouri State License -
- ✓ Kansas State License +
- ✖ Arkansas State License -

Missouri State License

License Number	License Class
[REDACTED]	Insurance Producer
Effective Date	Expiration Date
10/08/2004	11/30/2019

License LOA
935 - Accident & Health or Sickness
16 - Life

Arkansas State License

Your Arkansas license expired on 01/30/2019.
You'll need to renew your certification to be able to sell Lumeris Advantage in Arkansas.
If you believe this to be in error, contact [Producer Support](#) or visit [NIPR](#).

We are only showing the licenses for the states where we offer a product. To become 'Ready to Sell', you need to have an active license in at least one of these states. Please note: you will only be appointed to sell and receive commissions for those states in which you have an active license.

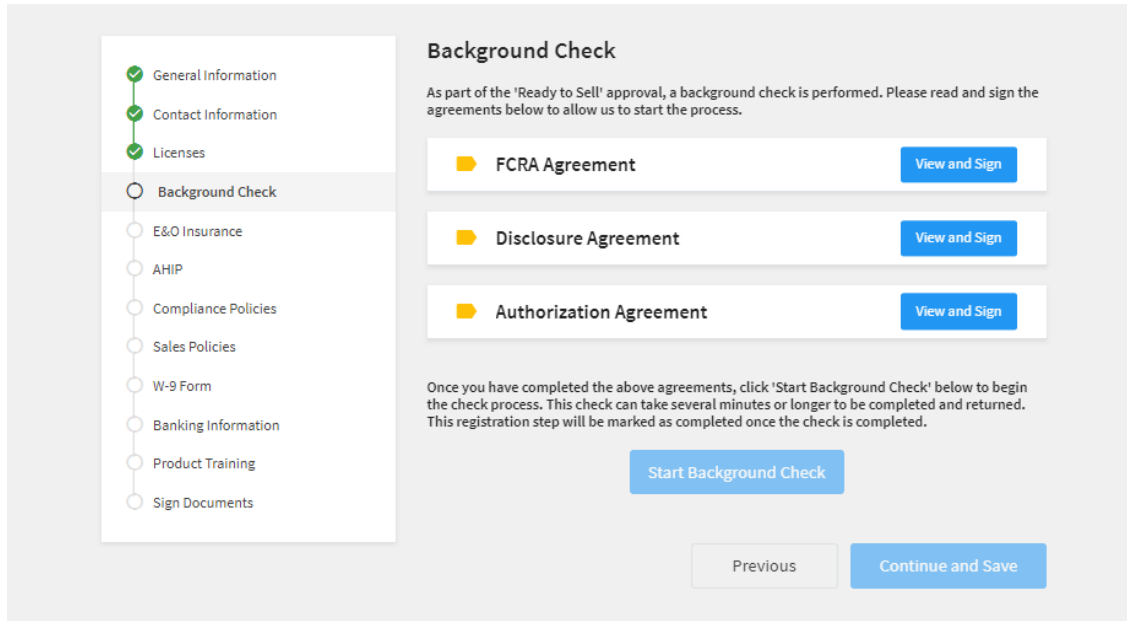
Previous [Continue and Save](#)

Previously held licenses will appear without the green checkmark as shown above. Expired licenses must be renewed in order for you to sell in those states.



Background Check

For each form listed on this page, click **View and Sign** to display the form. Type your name for your electronic signature and click **Complete**. Repeat the process for each agreement and then click **Start Background Check**.

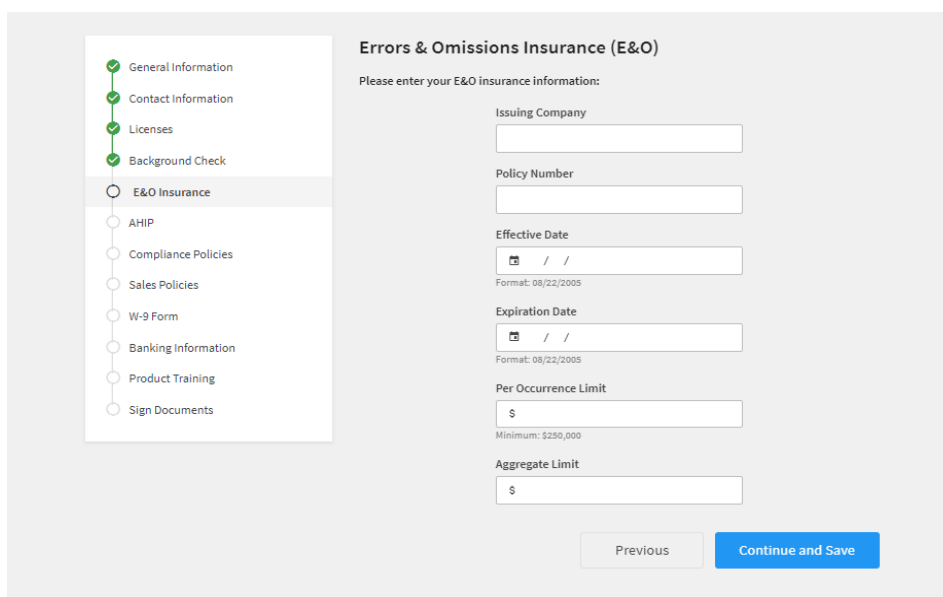


The screenshot shows a navigation menu on the left with the following items: General Information (checked), Contact Information (checked), Licenses (checked), Background Check (selected), E&O Insurance, AHIP, Compliance Policies, Sales Policies, W-9 Form, Banking Information, Product Training, and Sign Documents. The main content area is titled "Background Check" and contains the following text: "As part of the 'Ready to Sell' approval, a background check is performed. Please read and sign the agreements below to allow us to start the process." Below this text are three cards, each with a yellow arrow icon and a "View and Sign" button: "FCRA Agreement", "Disclosure Agreement", and "Authorization Agreement". Below these cards is a paragraph: "Once you have completed the above agreements, click 'Start Background Check' below to begin the check process. This check can take several minutes or longer to be completed and returned. This registration step will be marked as completed once the check is completed." At the bottom of the main content area are three buttons: "Start Background Check", "Previous", and "Continue and Save".

Once the **Background Check** has been started, click **Continue and Save** to move to the E&O Insurance page.

Errors and Omissions (E&O) Insurance

Complete any required fields (some will populate based on prior year certification, if applicable). Click **Continue and Save** to move forward.



The screenshot shows a navigation menu on the left with the following items: General Information (checked), Contact Information (checked), Licenses (checked), Background Check (checked), E&O Insurance (selected), AHIP, Compliance Policies, Sales Policies, W-9 Form, Banking Information, Product Training, and Sign Documents. The main content area is titled "Errors & Omissions Insurance (E&O)" and contains the following text: "Please enter your E&O insurance information:". Below this text are several input fields: "Issuing Company" (text box), "Policy Number" (text box), "Effective Date" (calendar icon, text box, format: 08/22/2005), "Expiration Date" (calendar icon, text box, format: 08/22/2005), "Per Occurrence Limit" (text box, \$ symbol, Minimum: \$250,000), and "Aggregate Limit" (text box, \$ symbol). At the bottom of the main content area are two buttons: "Previous" and "Continue and Save".

AHIP

In order to become “Ready to Sell”, you must complete America's Health Insurance Plans (AHIP) Marketing Medicare Advantage and Fraud, Waste and Abuse certifications. If you have not completed the certification, click the link on this screen to visit AHIP.

If you have your completed AHIP certificate, please upload it on this page. Enter the date that you completed the AHIP training and only upload the certificate for the most current plan year as shown.

Enter your name as an electronic signature, enter the date and click **Continue and Save** to move forward.

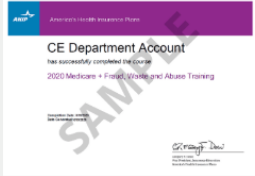
- General Information
- Contact Information
- Licenses
- Background Check
- E&O Insurance
- AHIP**
- Compliance Policies
- Sales Policies
- W-9 Form
- Banking Information
- Product Training
- Sign Documents

AHIP

Read and complete below:


In order to become Ready to Sell, you will need to complete America's Health Insurance Plans (AHIP) Marketing Medicare Advantage and Fraud, Waste and Abuse certifications. If you have not completed the certification, [please click here to visit AHIP](#).

If you have your completed AHIP certificate, please upload it here. Enter the date that you completed the AHIP training below and only upload the certificate for the most current plan year as shown.



(Sample Certificate)

Upload your AHIP certificate



Drag and drop a file here or click

You are attesting that you have completed the course requirements in accordance with CMS guidelines as presented in the program. When approved, you will be able to proceed to the next component of the training.

Signature

AHIP Completion Date

Format: 08/22/2005

Compliance Policies

In order to comply with Compliance Policy and Procedures (P&Ps), click each document link from this page and review the content.

When you're finished, review the acknowledgement statement. Enter your name as an electronic signature, enter the date and click **Continue and Save** to move forward.

- General Information
- Contact Information
- Licenses
- Background Check
- E&O Insurance
- AHIP
- Compliance Policies**
- Sales Policies
- W-9 Form
- Banking Information
- Product Training
- Sign Documents

Compliance Policies

Please read and sign the following:

Lumeris Advantage, Inc.
Compliance Policy and Procedures (P&Ps) Acknowledgement

I understand that it is my responsibility to be aware of the information contained in these P&Ps, and that I am expected to abide by these P&Ps as a condition of my contract with Lumeris. If I have questions at any time regarding this information, I will consult with the Lumeris Compliance Department.

I also acknowledge and understand that, although these documents reflect Lumeris's current policies regarding Compliance, it may be necessary to make changes from time to time, at Lumeris's discretion, to best serve the needs of the organization. I understand that once modified, the P&Ps will be available on the producer portal and I will be responsible for reading and attesting to the revised policy.

- [Code of Conduct](#)
- [CMP01 V.11 Duties of the Health Plan Compliance Officer](#)
- [CMP04 V.11 Compliance Violations Reporting and Investigation](#)
- [CMP13 V.10 Health Plan Document and Data Retention](#)
- [CMP16 V.09 Review of Health Plan Marketing Material](#)
- [CMP20 V.12 Conflict of Interest](#)
- [CMP23 V.12 Investigation of Sales Complaints](#)
- [CMP26 V.08 Compliance Ethics and Fraud Hotline](#)
- [CMP27 V.08 Non-Retaliation](#)
- [CMP36 V.06 Complaints Tracking Module Management](#)

By electronically signing this Acknowledgement Form, I hereby acknowledge that I have read and understand the content of the documents that comprise the Lumeris Advantage, Inc. Compliance policies and procedures (P&Ps) outlined above.

Authorization Signature

▶

Previous
Continue and Save



Sales Policies

In order to comply with Sales Policy and Procedures (P&Ps), click each document link from this page and review the content.

When you're finished, review the acknowledgement statement. Enter your name as an electronic signature, and click **Continue and Save** to move forward.

- General Information
- Contact Information
- Licenses
- Background Check
- E&O Insurance
- AHIP
- Compliance Policies
- Sales Policies**
- W-9 Form
- Banking Information
- Product Training
- Sign Documents

Sales Policies

Please read and sign the following:

Lumeris Advantage, Inc.
Sales Policy and Procedures (P&Ps) Acknowledgement

I understand that it is my responsibility to be aware of the information contained in these P&Ps, and that I am expected to abide by these P&Ps as a condition of my contract with Lumeris. If I have questions at any time regarding this information, I will consult with the Lumeris Sales Department.

I also acknowledge and understand that, although these documents reflect Lumeris's current policies regarding Sales, it may be necessary to make changes from time to time, at Lumeris's discretion, to best serve the needs of the organization. I understand that once modified, the P&Ps will be available on the producer portal and I will be responsible for reading and attesting to the revised policy.

- [SLS01 V.07 Sales Training](#)
- [SLS02 V.10 Sales and Marketing Guidelines](#)
- [SLS03 V.09 Sales Oversight](#)
- [SLS04 V.07 Marketing Sales and Education Events](#)
- [SLS07 V.07 Sales to Vulnerable Individuals](#)

By electronically signing this Acknowledgement Form, I hereby acknowledge that I have read and understand the content of the documents that comprise the Lumeris Advantage, Inc. Sales policies and procedures (P&Ps) outlined above.

Authorization Signature

✍

Previous

Continue and Save



W-9 Form

Complete any required fields (some will populate based on prior year certification, if applicable). Click **Continue and Save** to move forward.

- General Information
- Contact Information
- Licenses
- Background Check
- E&O Insurance
- AHIP
- Compliance Policies
- Sales Policies
- W-9 Form**
- Banking Information
- Product Training
- Sign Documents

W-9 Form Information

Please provide the information below for the W9 that will be e-signed during the Documents step. Your 1099 will be issued in accordance with the completion of this document:



(Example W-9 Form)

Name

As it appears on your income tax return

Business Name / Disregarded Entity

If different from above

Address

City

State

Zip

Federal Tax Class

Social Security Number

- or -

Employer Identification Number

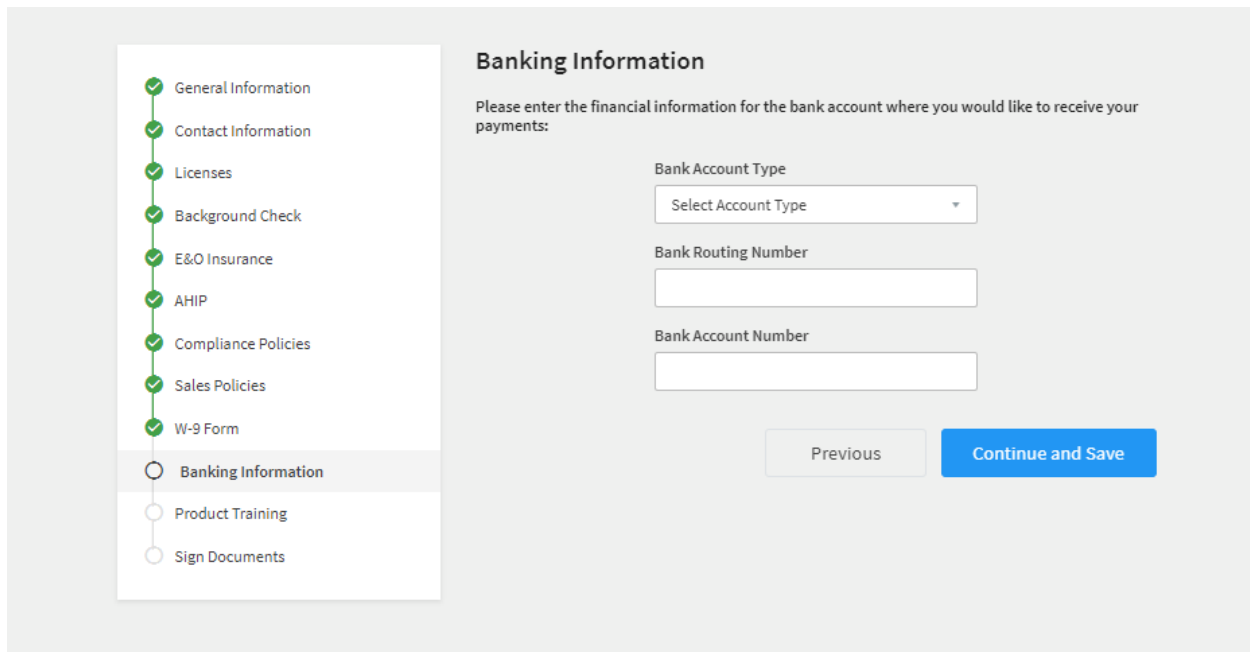
[Previous](#)

[Continue and Save](#)



Banking Information

Complete any required fields (some will populate based on prior year certification, if applicable). Click **Continue and Save** to move forward.

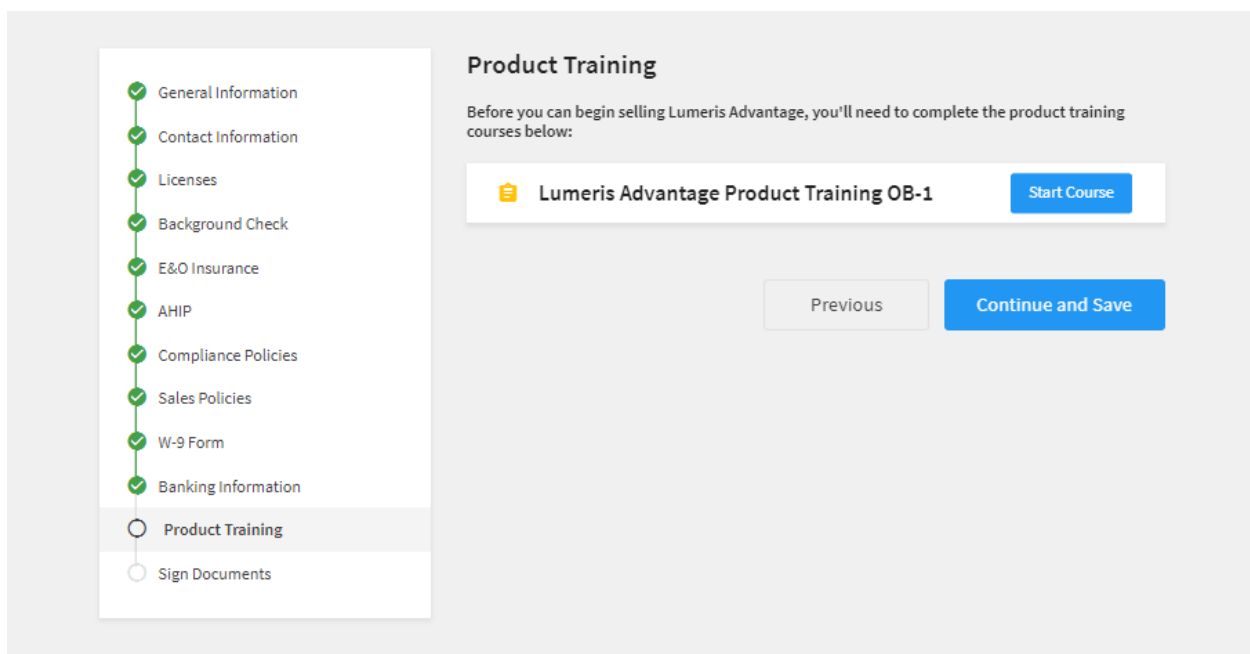


The screenshot shows a navigation sidebar on the left with a vertical list of steps: General Information, Contact Information, Licenses, Background Check, E&O Insurance, AHIP, Compliance Policies, Sales Policies, W-9 Form, Banking Information (highlighted with a radio button), Product Training, and Sign Documents. The main content area is titled "Banking Information" and contains the instruction: "Please enter the financial information for the bank account where you would like to receive your payments:". Below this are three input fields: "Bank Account Type" (a dropdown menu with "Select Account Type" selected), "Bank Routing Number" (a text input field), and "Bank Account Number" (a text input field). At the bottom right of the form are two buttons: "Previous" and "Continue and Save".

Product Training

The product training course(s) on this page are required before you can begin selling.

Click **Start Course** to view the course. Click **Continue and Save** to move forward.

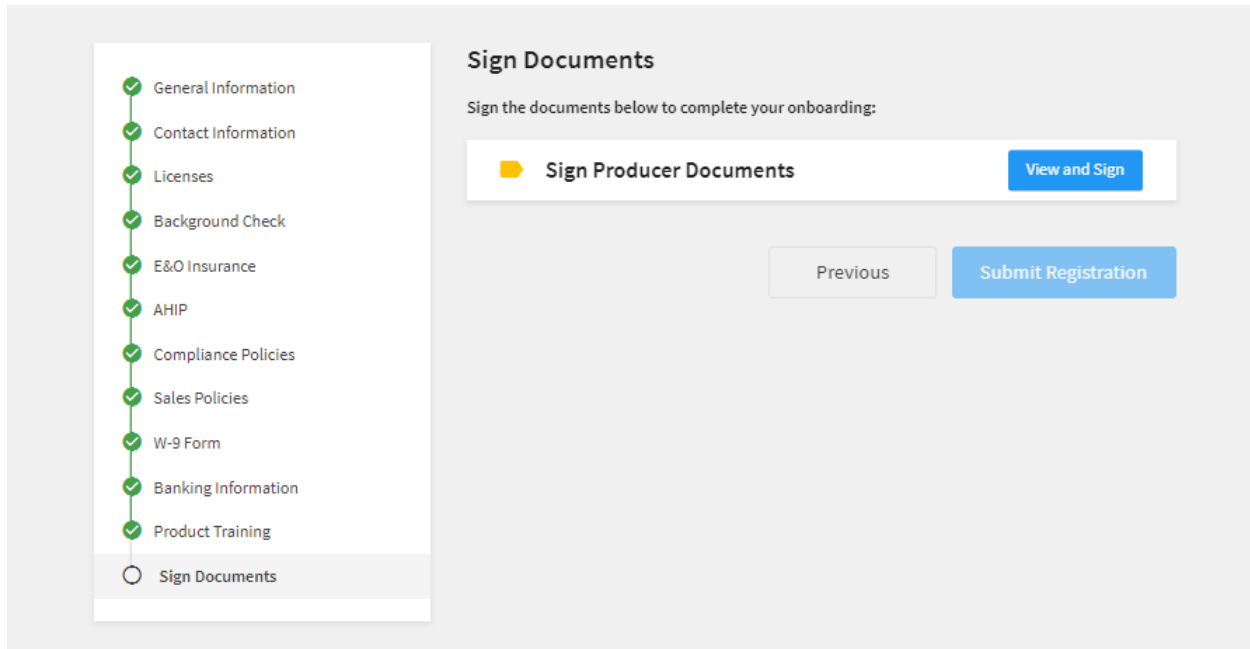


The screenshot shows the same navigation sidebar as the previous form, but with "Product Training" highlighted. The main content area is titled "Product Training" and contains the instruction: "Before you can begin selling Lumeris Advantage, you'll need to complete the product training courses below:". Below this is a card for a course: "Lumeris Advantage Product Training OB-1" with a "Start Course" button. At the bottom right of the form are two buttons: "Previous" and "Continue and Save".

Sign Documents

To complete your onboarding process, sign the Producer Documents.

Click **View and Sign** to display the form. Type your name for your electronic signature and click **Submit Registration**.



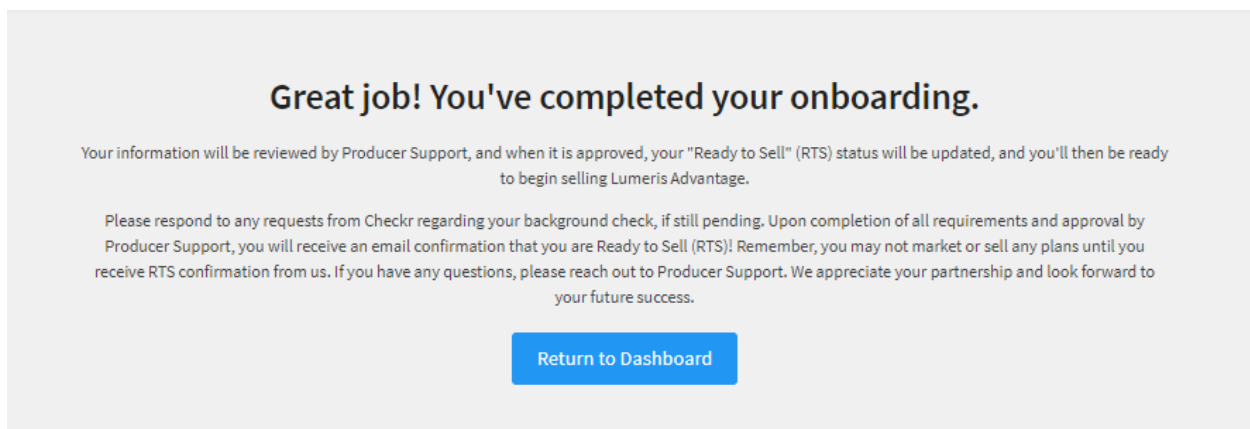
The screenshot shows a progress bar on the left with 13 items, all marked with a green checkmark except for the last one, 'Sign Documents', which is marked with a radio button. The main content area is titled 'Sign Documents' and contains the instruction 'Sign the documents below to complete your onboarding:'. Below this is a white box with a yellow arrow icon and the text 'Sign Producer Documents', followed by a blue 'View and Sign' button. At the bottom of the main area are two buttons: a grey 'Previous' button and a blue 'Submit Registration' button.

Completion

When you see the message below, you've completed the online process.

Once your information has been reviewed and approved, you will receive email confirmation from Producer Support, your status will be updated, and you will be read to sell.

Note: Be sure to respond to any inquiries about your background check.



The screenshot shows a completion message with the heading 'Great job! You've completed your onboarding.' Below the heading is a paragraph: 'Your information will be reviewed by Producer Support, and when it is approved, your "Ready to Sell" (RTS) status will be updated, and you'll then be ready to begin selling Lumeris Advantage.' This is followed by another paragraph: 'Please respond to any requests from Checkr regarding your background check, if still pending. Upon completion of all requirements and approval by Producer Support, you will receive an email confirmation that you are Ready to Sell (RTS)! Remember, you may not market or sell any plans until you receive RTS confirmation from us. If you have any questions, please reach out to Producer Support. We appreciate your partnership and look forward to your future success.' At the bottom of the message is a blue button labeled 'Return to Dashboard'.

