



# Clever Care Broker Portal User guide

We are dedicated to simplifying the way you manage your Clever Care business. Through the latest technology and team of devoted advocates, we have created a faster, smarter, and more secure way to support you so you can focus on growing your membership.

# Agenda

- [Dashboard Overview](#)
- [Widget details](#)
- [Notifications](#)
- [Application Status](#)
- [Commission statements](#)
- [Book of Business](#)
- [Payee Info](#)
- [Manage my licenses](#)
- [My Status & Credentials](#)
- [My Documents](#)
- [Contact](#)

# Introduction to the Portal Dashboard

- Overview of your credential status, tracking application, commission statement
- Quick link easily access to our website resources and online enrollment
- Notifications/Alerts





# Portal Dashboard

The screenshot shows the Clever Care Health Plan Portal Dashboard. On the left is a dark blue navigation sidebar with the following menu items: NAVIGATION, DASHBOARD, STATEMENTS, BOOK OF BUSINESS, APPLICATION STATUS, MY DOCUMENTS, MY STATUS & CREDENTIALS, MY ACCOUNT, and WORKFLOWS. The main content area is titled "Dashboard" and features several widgets:

- Quick Links:** A table with two columns: Link and Description. It contains two entries: "Clever Care Health Plan" (Clever Care Health Plan) and "EZ Web Enrollment" (EZ enroll application).
- My Credentials:** A widget with a red header. It shows "Rep Status" as "Active/Certified" and "State Licenses" as "2 Active". A "View Details" button is at the bottom.
- Commission Statement History:** A widget with a green header. It has a table with columns: Statement Date, Statement Description, and Total Commission. A "View Details" button is at the bottom.
- New Application Status:** A widget with a grey header. It has a table with columns: Application ID, MBI, Application Date, First Name, Last Name, Status, and NPN. A "View Details" button is at the bottom.
- New Enrollments:** A widget with a teal header. It contains a line chart titled "Newly enrolled members within the past 12 months". The y-axis ranges from 0 to 1.0 in increments of 0.1.

When you log into the Portal, you are directed straight to your dashboard, where you will see several widgets on the landing page to track KPIs including your credentials, your downline information, application status, commission history, etc.



Medicare Book of Business shows the enrolled members by month



This widget shows a history of the your commissions. Clicking on “View Details” will take you to the “Statements” screen

Commission Statement History		
Statement Date	Statement Description	Total Commission
<a href="#">View Details</a>		

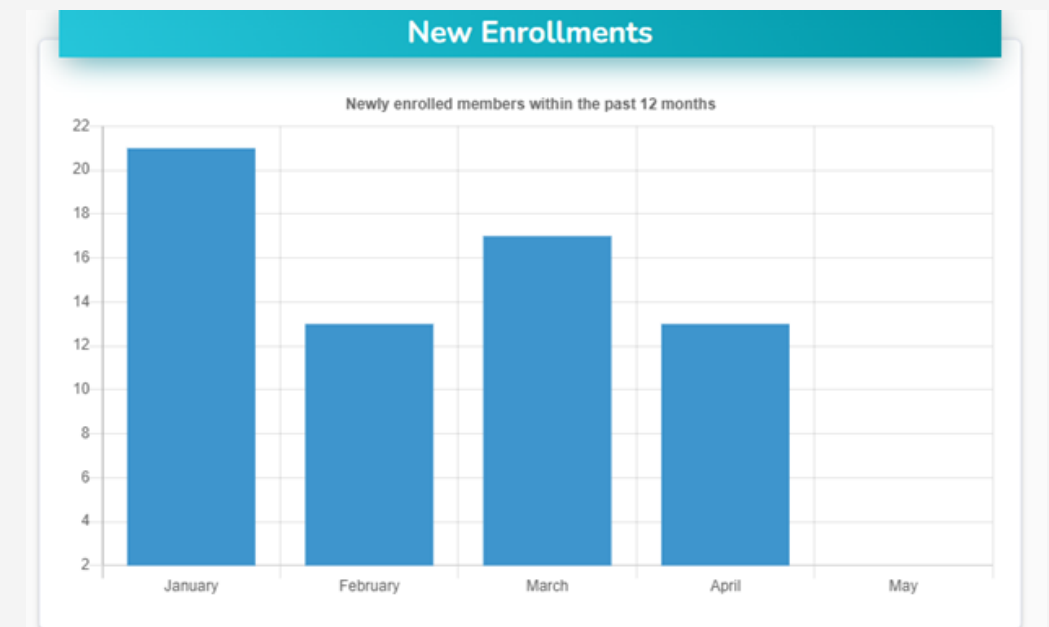
Shows the status of enrollments: Clicking on “View Details” will take you to the “Application Status” screen

New Application Status						
Application ID	MBI	Application Date	First Name	Last Name	Status	NPN
<a href="#">View Details</a>						

This widget displays your current ready-to-sell status. Clicking on the “View Details” takes you to the “My Status & Credentials” screen

My Credentials	
Rep Status	Suspended - Pending Training
State Licenses	1 Active
<a href="#">View Details</a>	

Displays new member enrollments over the last year



This widget centralized all broker tool links and allows you to easily access common tool sites: Online enrollment, clever care website, etc.

Quick Links	
Link	Description
<a href="#">Clever Care Health Plan</a>	Clever Care Health Plan
<a href="#">EZ Web Enrollment</a>	EZ enroll application



If you have any pending workflows such as approval of hierarchy change, a notification will appear on the bell icon in the top right-hand corner next to your name

The screenshot displays the Clever Care Health Plan dashboard. On the left is a navigation sidebar with options: DASHBOARD, STATEMENTS, BOOK OF BUSINESS, APPLICATION STATUS, MY CREDENTIALS, MY ACCOUNT, and WORKFLOWS. The main dashboard area is titled "Dashboard" and contains several widgets:

- Medicare Book of Business:** A widget with a pink header and a line chart titled "Total Book of Business over time within the past 12 months". The y-axis ranges from 0 to 1.
- New Application Status:** A widget with a grey header and a table with columns: Application ID, MBI, Application Date, First Name, Last Name, Status, and Reason. Below the table is a "View Details" button.
- Alerts Center:** A blue notification box with a bell icon, containing two messages: "Congratulations! Your onboarding application has been approved. (TD)" dated May 23, 2022 11:49 AM PDT. A green arrow points to the bell icon.
- History:** A green widget with a "Total Commission" label.
- Commissions:** A green widget with a line chart titled "Commission Totals for the past 12 months". The y-axis ranges from \$0.00 to \$1.00 in \$0.10 increments. The x-axis shows months from Jun to May.
- New Enrollments:** A teal widget with a line chart titled "Newly enrolled members within the past 12 months". The y-axis ranges from 0 to 1.0 in 0.1 increments. The x-axis shows months from Jun to May.

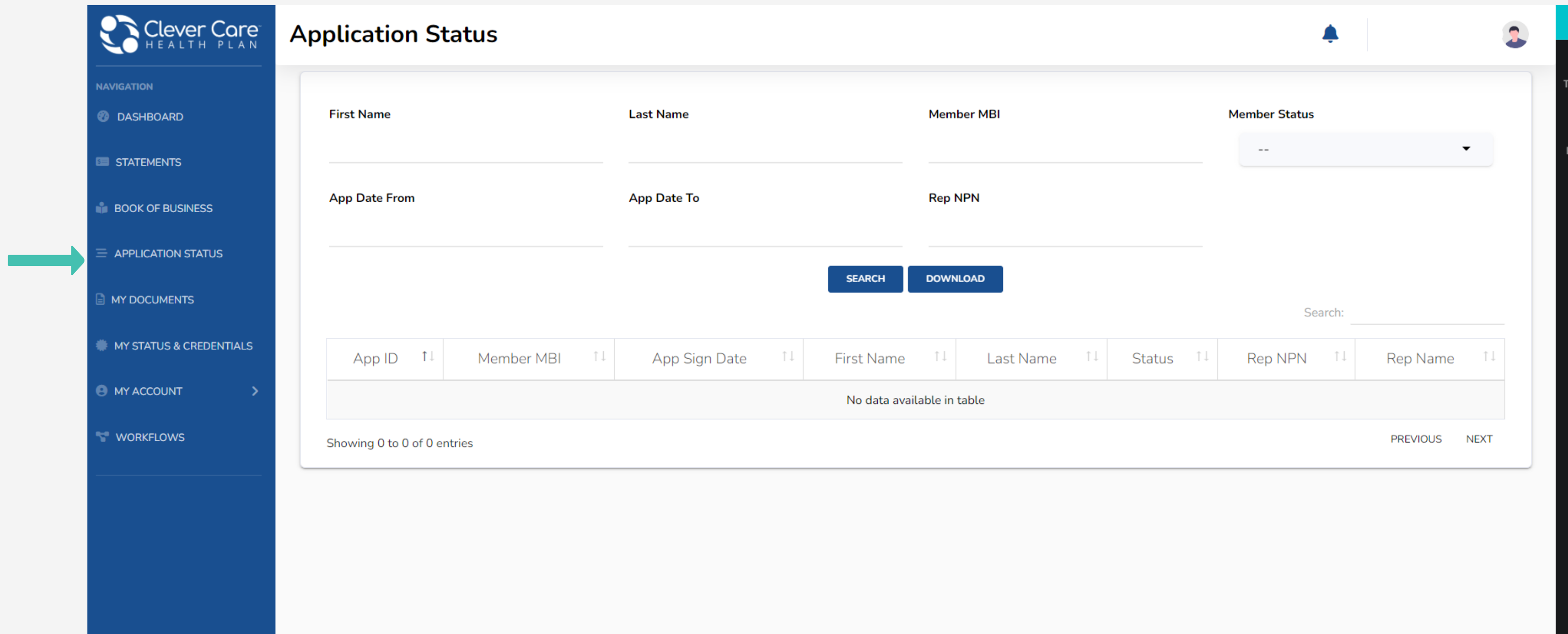
The top right corner shows the user profile for JUSTIN JACOBS with an "Edit" link.

# Tracking Application status

**We provide your application statuses with more than just CMS message, you will be able to view each step from our internal audit to CMS accepted**



By navigating to the “Application Status” from the left-hand menu, you will be able to view the status of all potential enrollments



**Application Status**

NAVIGATION

- DASHBOARD
- STATEMENTS
- BOOK OF BUSINESS
- APPLICATION STATUS**
- MY DOCUMENTS
- MY STATUS & CREDENTIALS
- MY ACCOUNT >
- WORKFLOWS

First Name Last Name Member MBI Member Status

App Date From App Date To Rep NPN

SEARCH DOWNLOAD

Search: \_\_\_\_\_

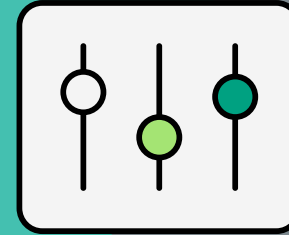
App ID ↑↓	Member MBI ↑↓	App Sign Date ↑↓	First Name ↑↓	Last Name ↑↓	Status ↑↓	Rep NPN ↑↓	Rep Name ↑↓
No data available in table							

Showing 0 to 0 of 0 entries PREVIOUS NEXT



# Commission

- Automated commission payments are available in your bank account by the 15th of every month
- Receive, review and download your commission statements in real-time



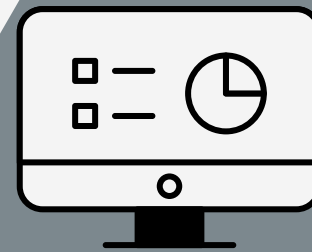
## Statement

We publish your commission statement monthly on broker portal



## Book of Business

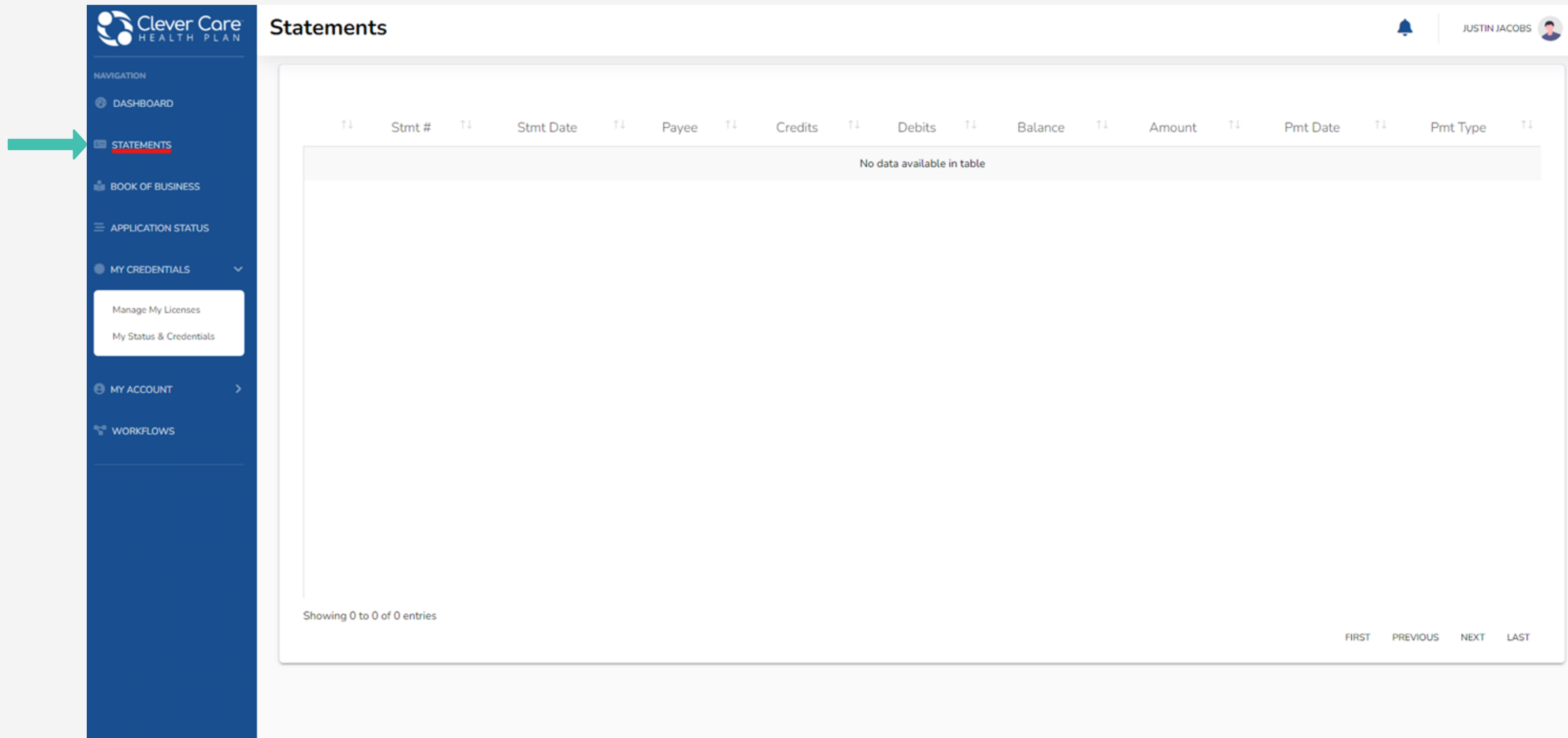
Manage BoB and grow your business with us



## Payee Info

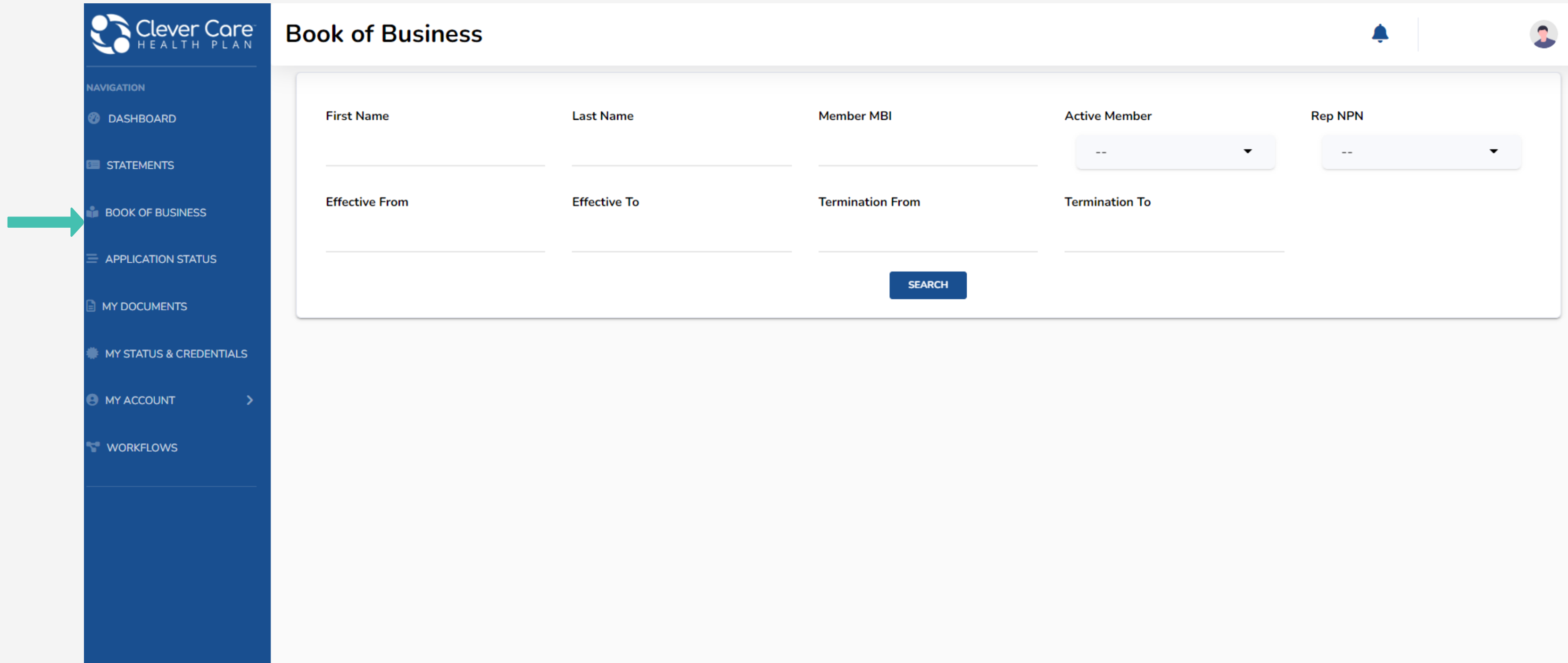
Easy to edit payee information

You can navigate to the “Statements” screen by clicking on the link in the left-hand menu. Search for a member using any of the criteria listed below (Name, MBI, Rep ID, etc) or click “Search” to see all members. Click on the “Download” button to download the latest statement.



The screenshot displays the 'Statements' page in the Clever Care Health Plan system. On the left, a dark blue navigation menu contains several options: DASHBOARD, STATEMENTS (highlighted with a green arrow), BOOK OF BUSINESS, APPLICATION STATUS, MY CREDENTIALS (with a dropdown menu containing 'Manage My Licenses' and 'My Status & Credentials'), MY ACCOUNT, and WORKFLOWS. The main content area is titled 'Statements' and features a table with the following columns: Stmt #, Stmt Date, Payee, Credits, Debits, Balance, Amount, Pmt Date, and Pmt Type. The table is currently empty, with a message 'No data available in table' centered within it. At the bottom left of the table area, it says 'Showing 0 to 0 of 0 entries'. At the bottom right, there are navigation buttons: FIRST, PREVIOUS, NEXT, and LAST. The top right of the page shows a notification bell icon and the user's name, JUSTIN JACOBS, next to a profile picture.

Clicking on the “Book of Business” link on the left-hand menu of the Portal will take you to the “Book of Business” screen. Enter some criteria to narrow down the search. This list can also be downloaded.

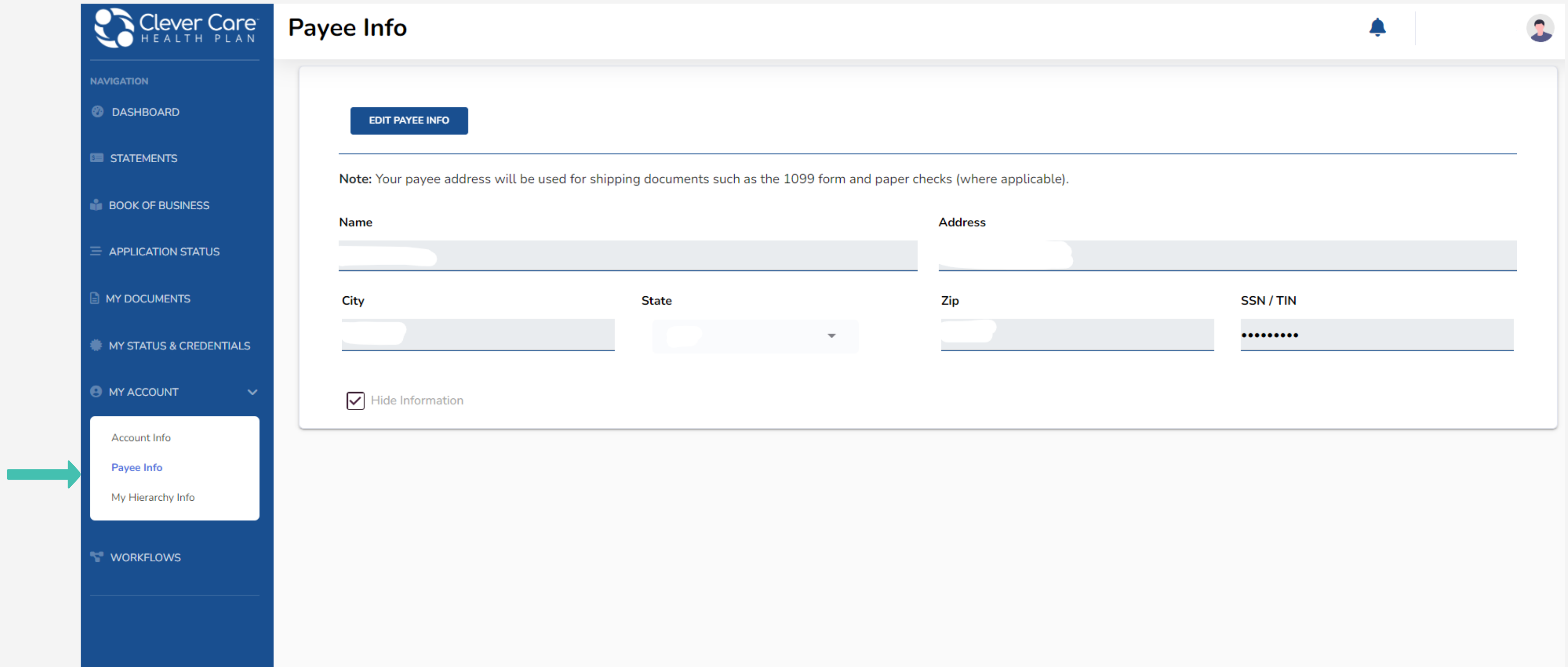


The screenshot displays the 'Book of Business' search interface. On the left, a dark blue navigation menu lists various options: DASHBOARD, STATEMENTS, BOOK OF BUSINESS (highlighted with a green arrow), APPLICATION STATUS, MY DOCUMENTS, MY STATUS & CREDENTIALS, MY ACCOUNT, and WORKFLOWS. The main content area is titled 'Book of Business' and features a search form with the following fields:

- First Name
- Last Name
- Member MBI
- Active Member (dropdown menu)
- Rep NPN (dropdown menu)
- Effective From
- Effective To
- Termination From
- Termination To

A blue 'SEARCH' button is positioned below the search fields. In the top right corner of the page, there is a notification bell icon and a user profile icon.

Under “My Account” you can view or edit account info such as your address, or payee information. Clicking on “My Account” opens two sub-menu items: “Account Info” and “Payee Info”



**Clever Care**  
HEALTH PLAN

NAVIGATION

- DASHBOARD
- STATEMENTS
- BOOK OF BUSINESS
- APPLICATION STATUS
- MY DOCUMENTS
- MY STATUS & CREDENTIALS
- MY ACCOUNT ▼
  - Account Info
  - Payee Info**
  - My Hierarchy Info
- WORKFLOWS

## Payee Info

[EDIT PAYEE INFO](#)

**Note:** Your payee address will be used for shipping documents such as the 1099 form and paper checks (where applicable).

<b>Name</b>		<b>Address</b>	
<input type="text"/>		<input type="text"/>	
<b>City</b>	<b>State</b>	<b>Zip</b>	<b>SSN / TIN</b>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

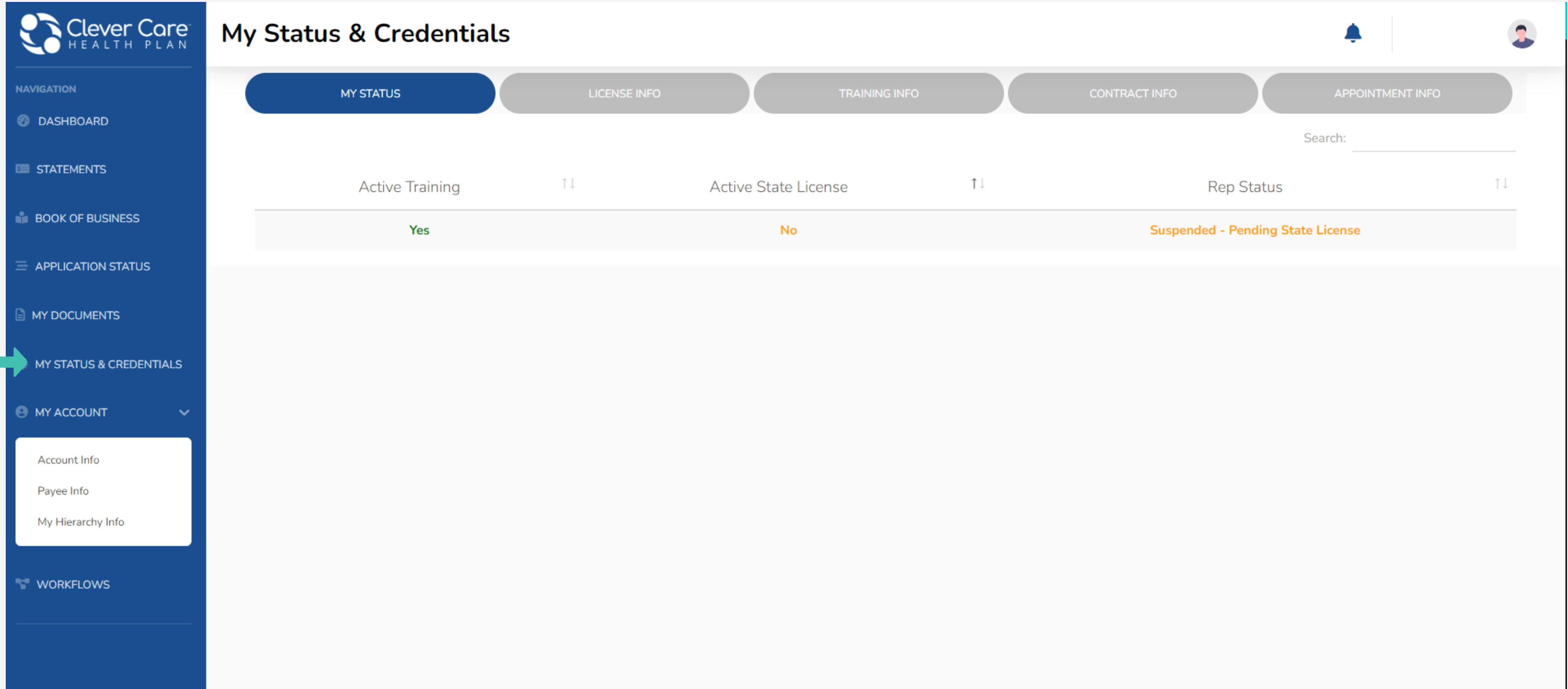
Hide Information

# My Credentials & Documents

- View state licenses
- Appointment information
- Documents management



“This tab is broken down further into 5 sub-headings, “My Status”, “License Info”, “Training Info”, “Contact Info” and “Appointment Info”



**My Status & Credentials**

NAVIGATION

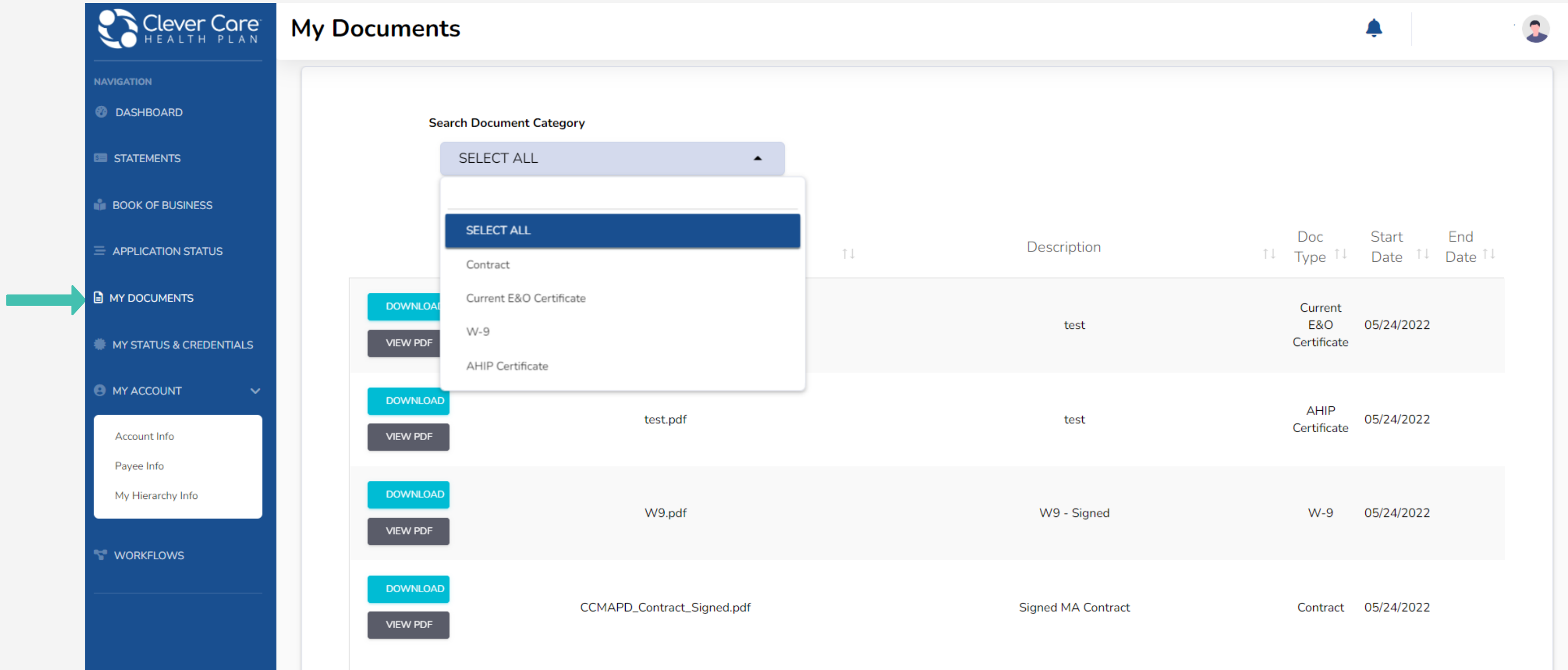
- DASHBOARD
- STATEMENTS
- BOOK OF BUSINESS
- APPLICATION STATUS
- MY DOCUMENTS
- MY STATUS & CREDENTIALS**
- MY ACCOUNT
  - Account Info
  - Payee Info
  - My Hierarchy Info
- WORKFLOWS

MY STATUS | LICENSE INFO | TRAINING INFO | CONTRACT INFO | APPOINTMENT INFO

Search: \_\_\_\_\_

Active Training	Active State License	Rep Status
Yes	No	Suspended - Pending State License

You can manage and download your contracts, AHIP, E&O, W9 under "My documents" tab



**My Documents**

Search Document Category

SELECT ALL

SELECT ALL

Contract

Current E&O Certificate

W-9

AHIP Certificate

Doc Type	Description	Start Date	End Date
Current E&O Certificate	test	05/24/2022	
AHIP Certificate	test	05/24/2022	
W-9	W9 - Signed	05/24/2022	
Contract	Signed MA Contract	05/24/2022	

Account Info

Payee Info

My Hierarchy Info

WORKFLOWS

# Contact Us

In-language  
representative to  
help our brokers  
on broker support  
hotline

Solution  
focused,  
professional  
and effective  
are our goals

Our Broker Support Team is here to help.

- Email: [broker@ccmapd.com](mailto:broker@ccmapd.com)
- Hot line: (877) 525-3837
- FAX: (657) 276-4722
- Resources: <https://clevercarehealthplan.com/brokers/>

Contract question?



Commission  
statement  
question?



Tip: Please note that your NPN is your writing number for any common requests