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

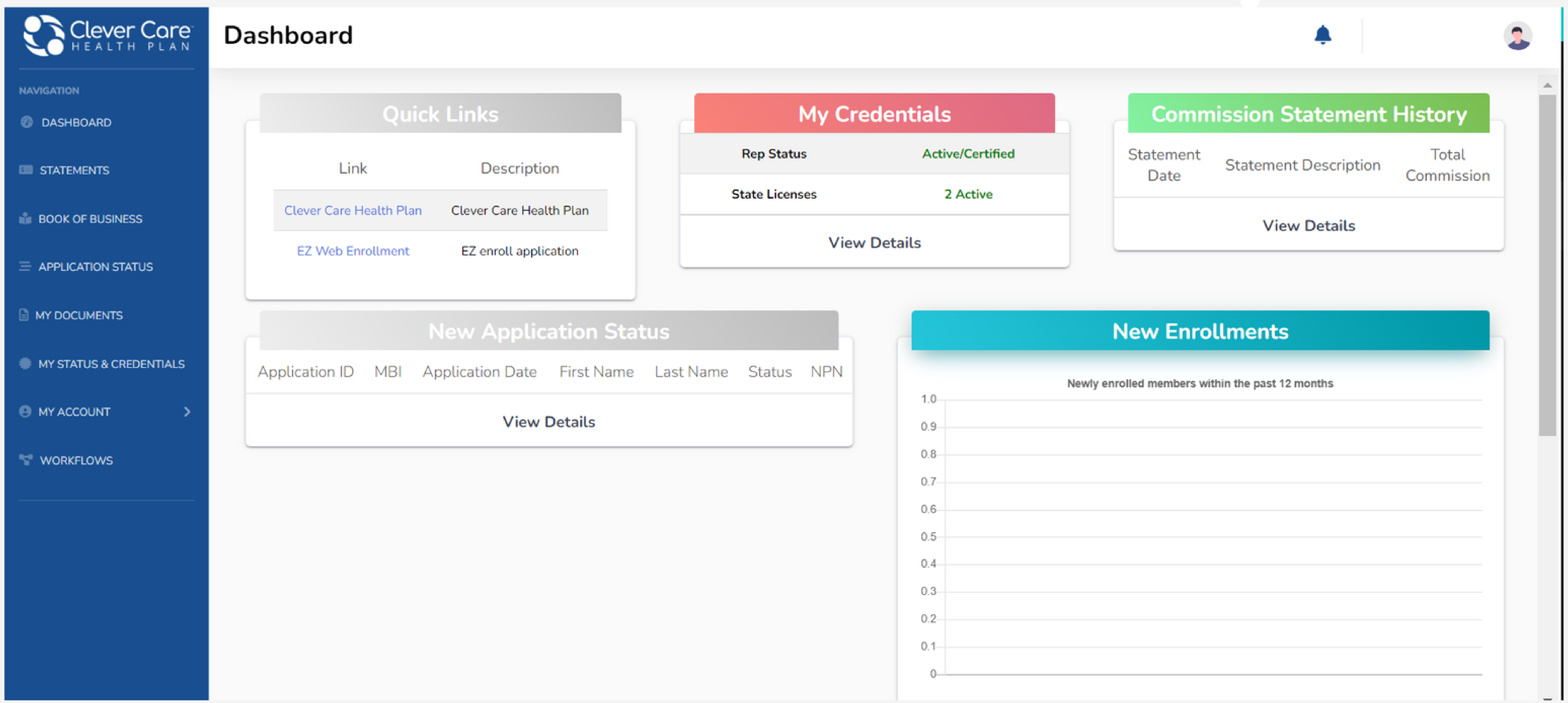
- Dashboard Overview
- Widget details
- Notifications
- Application Status
- Commission statements
- Book of Business
- Payee Info
- Manage my licenses
- My Status & Credentials
- My Documents
- Contact

Clever Care HEALTH PLAN

Introduction to the Portal Dashboard

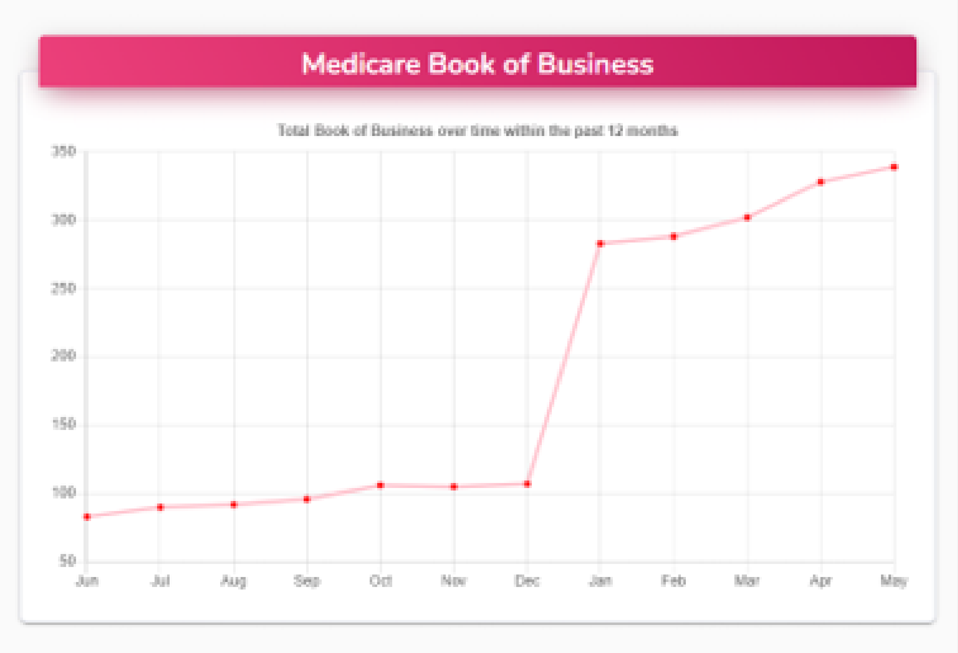
- Overview of your credential status, tracking application, commission statement
- Quick link easily access to our website resources and online enrollment
- Notifications/Alerts

Portal Dashboard

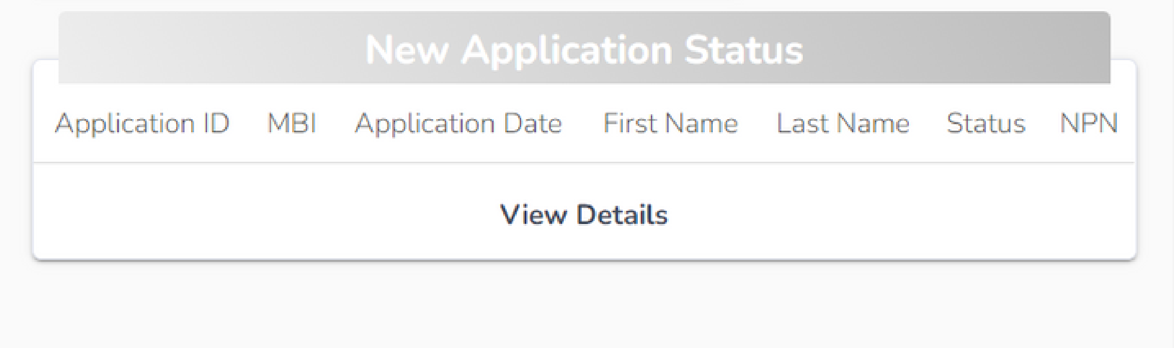


When you log into the Portal, you are directed straight to your dashboard, where you will see several widgets on the landing page to track KPIs including your credentials, your downline information, application status, commission history, etc.

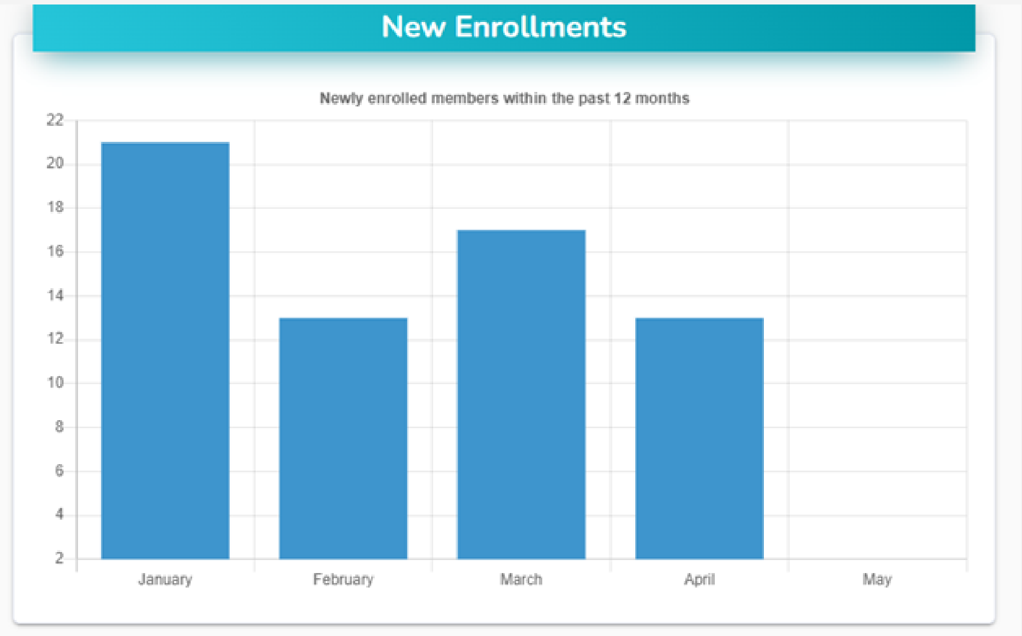
Medicare Book of Business shows the enrolled members by month



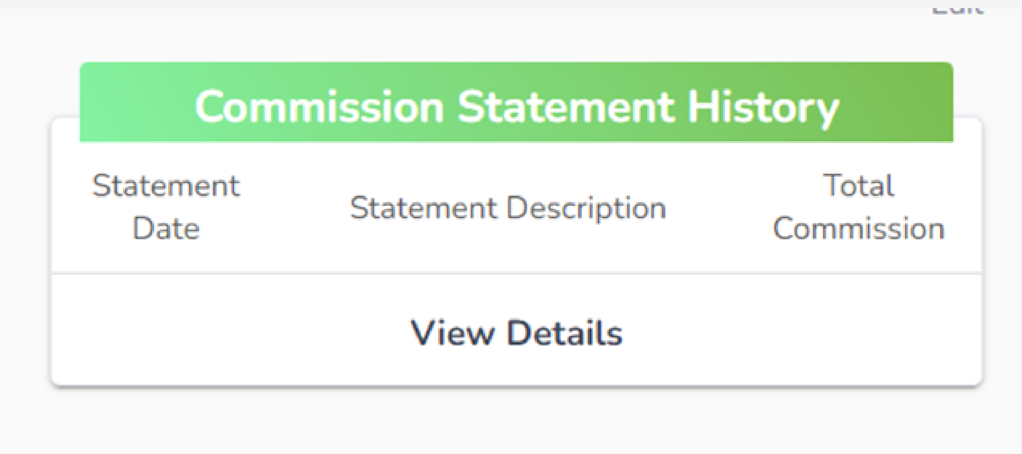
Shows the status of enrollments: Clicking on “View Details” will take you to the “Application Status” screen



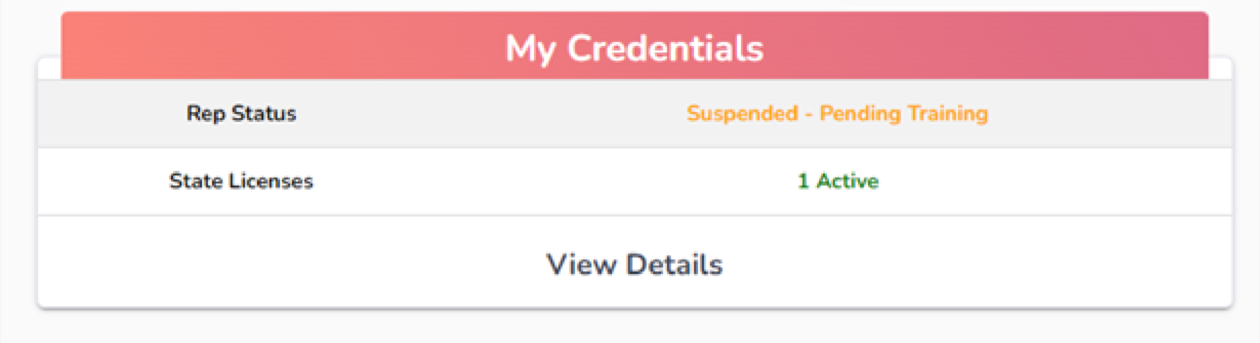
Displays new member enrollments over the last year



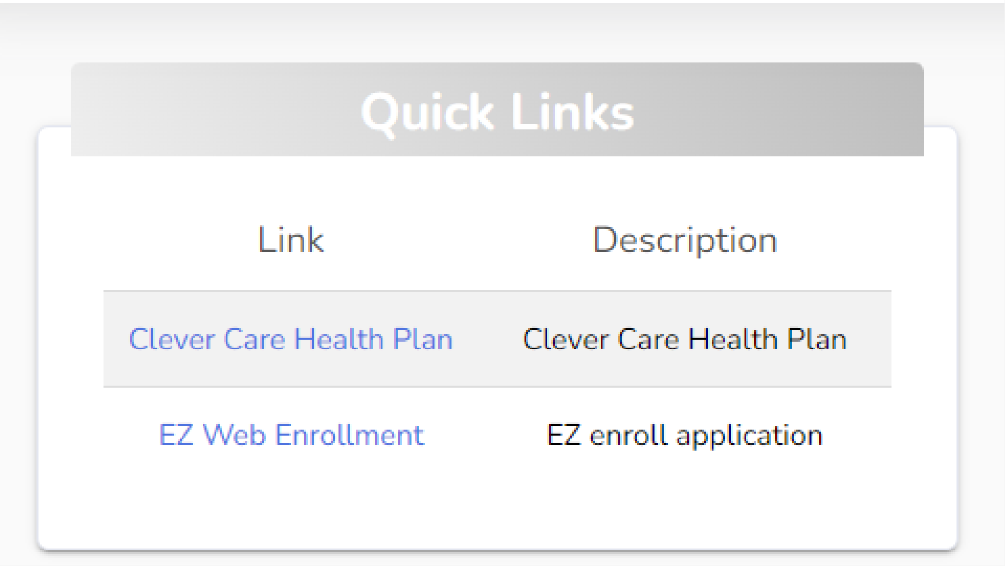
This widget shows a history of the your commissions. Clicking on “View Details” will take you to the “Statements” screen



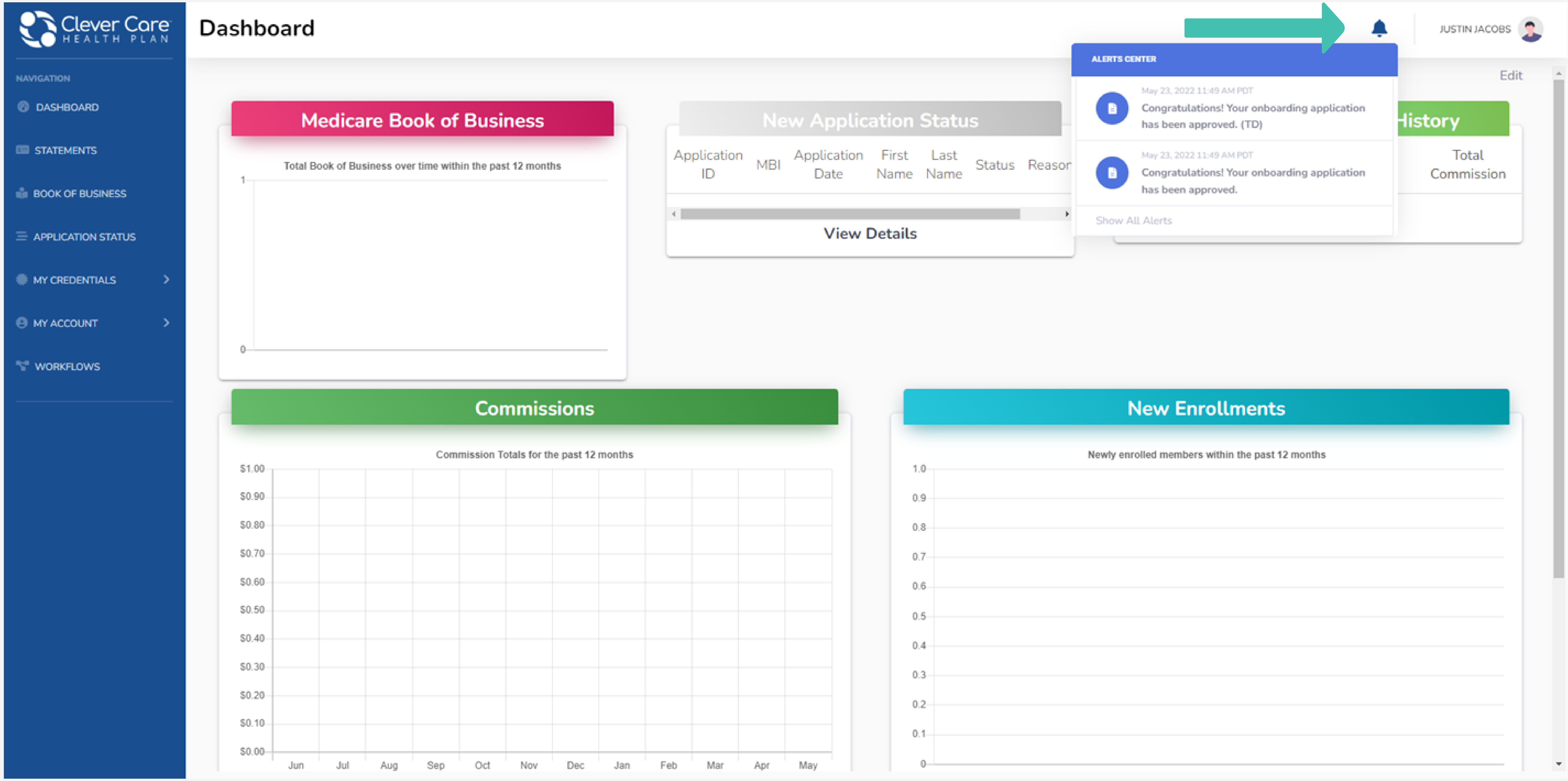
This widget displays your current ready-to-sell status. Clicking on the “View Details” takes you to the “My Status & Credentials” screen



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



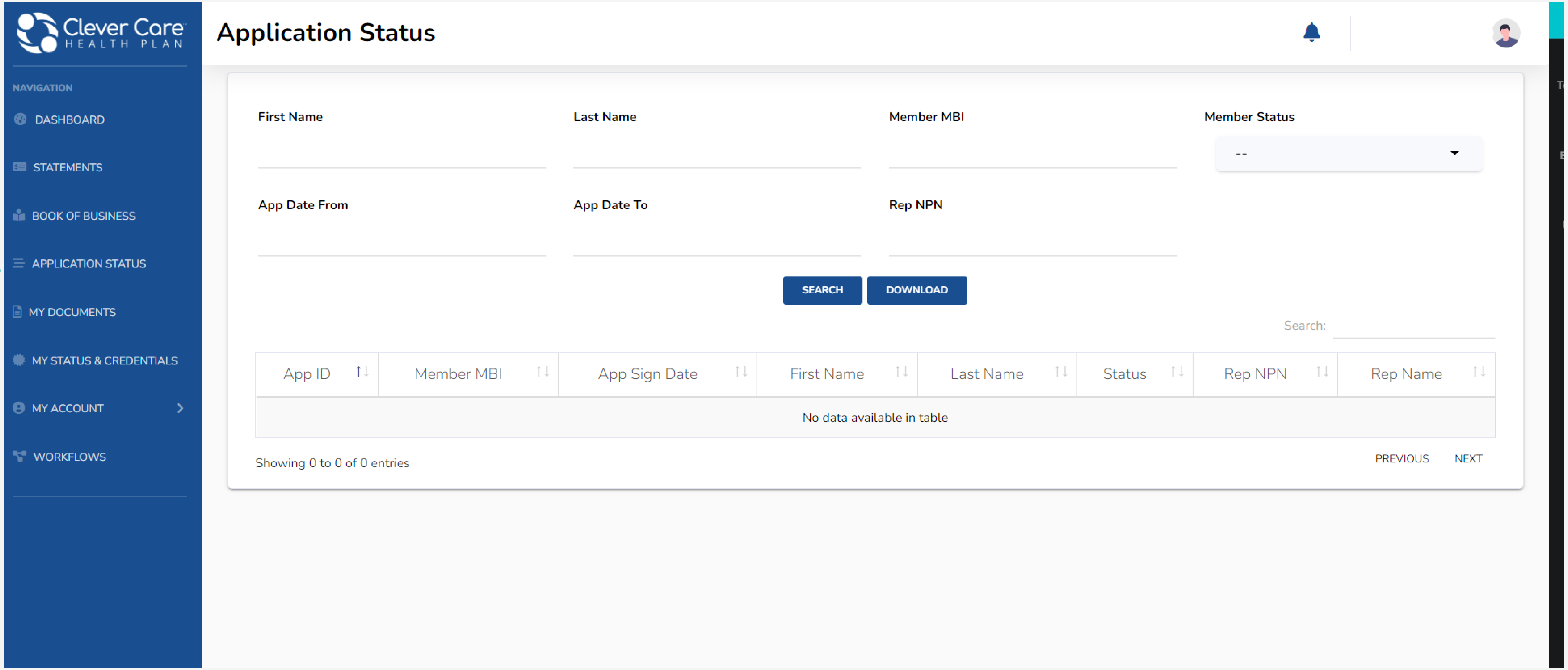
If you have any pending workflows such as approval of hierarchy change, a notification will appear on the bell icon in the top right-hand corner next to your name



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



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

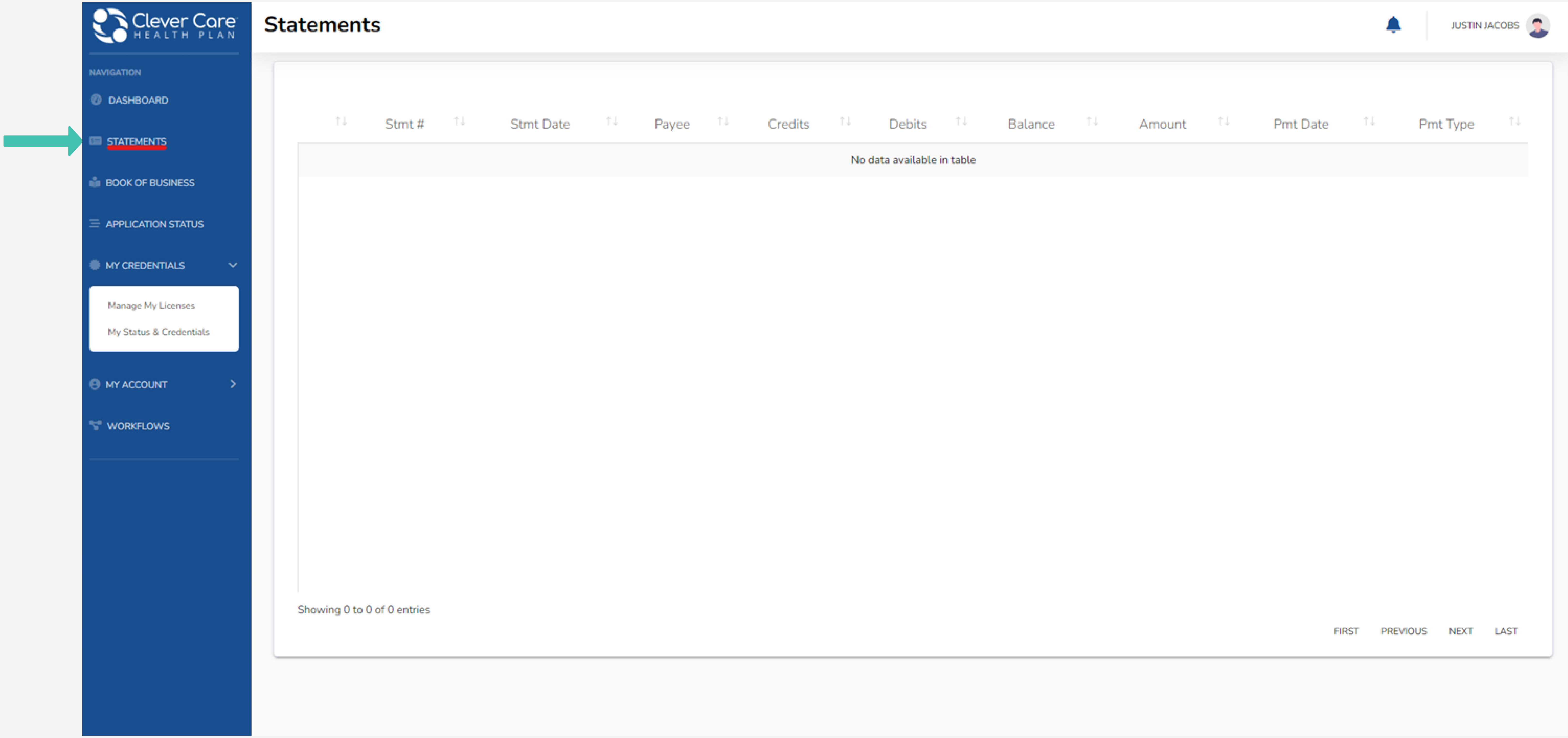
Book of Business

Manage BoB and grow your business with us

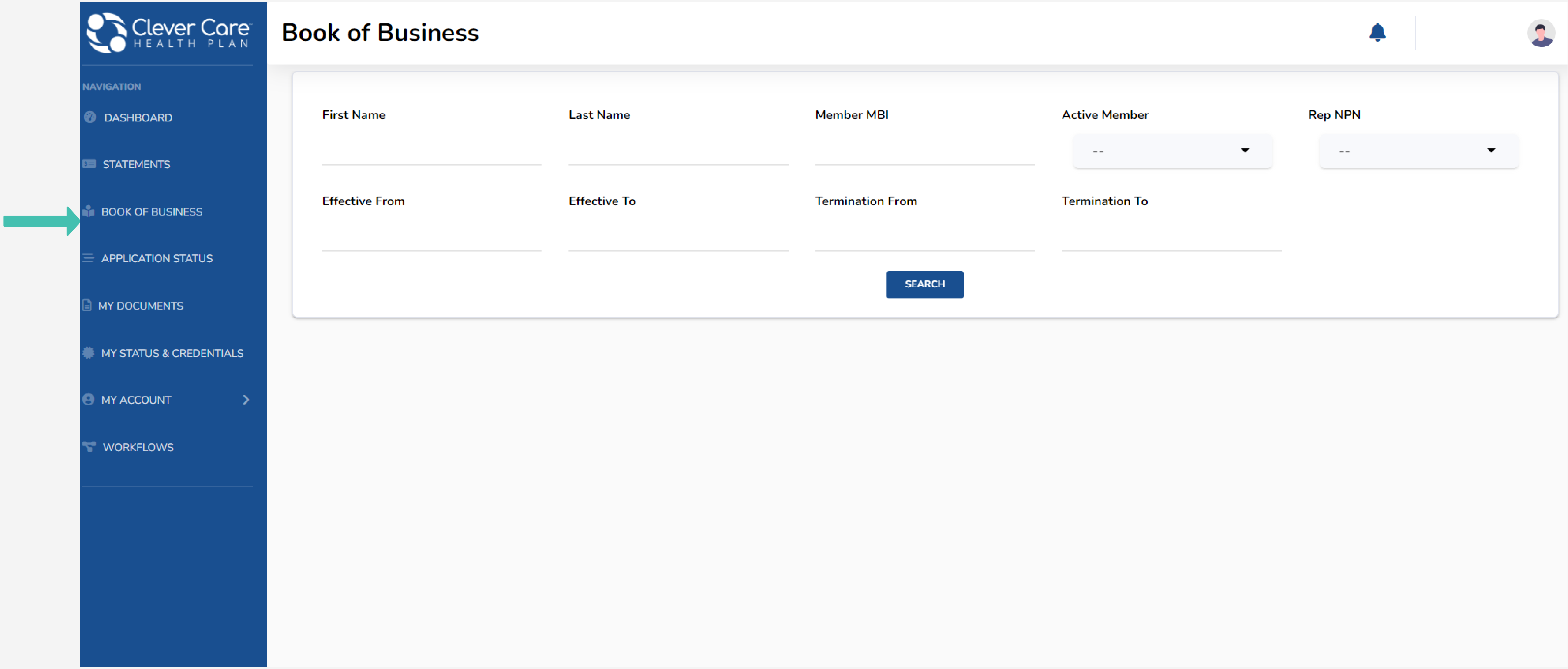
Payee Info

Easy to edit payee information

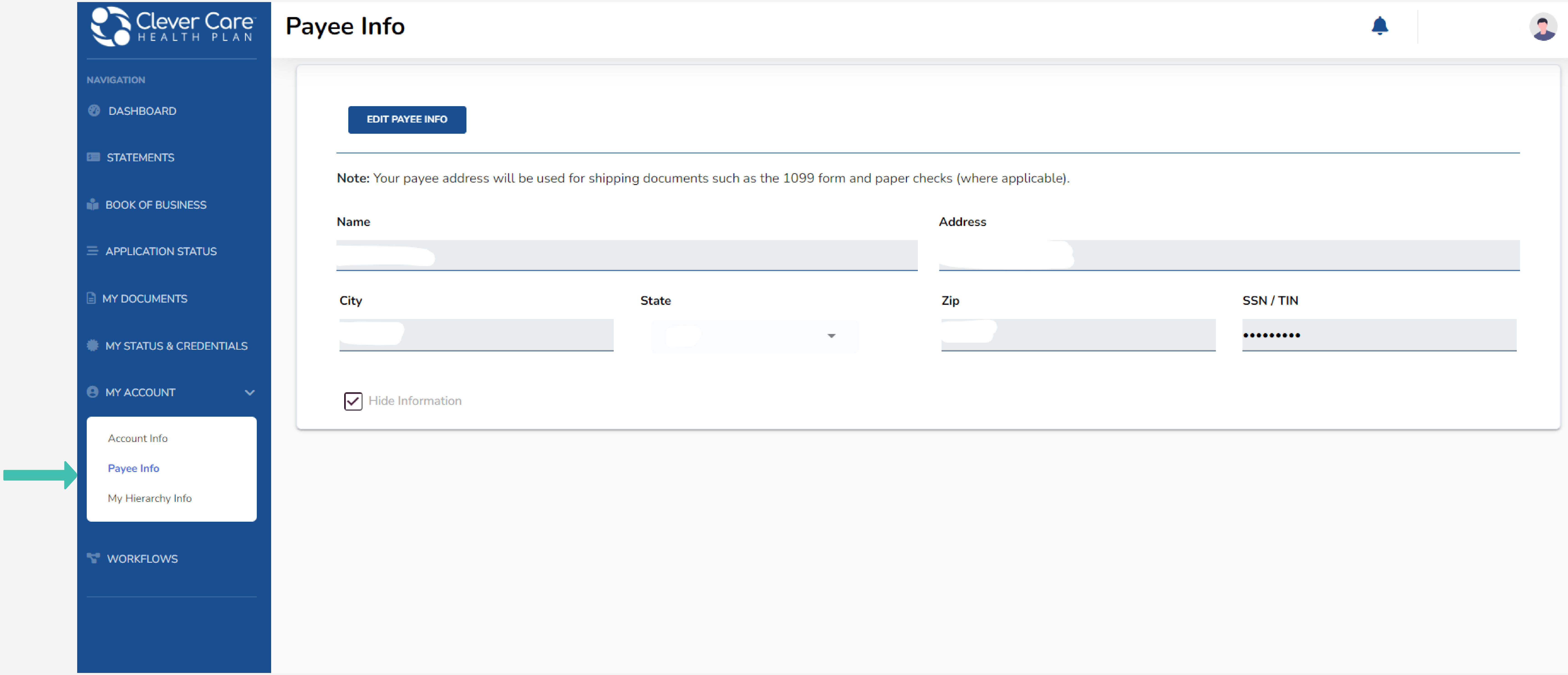
You can navigate to the “Statements” screen by clicking on the link in the left-hand menu. Search for a member using any of the criteria listed below (Name, MBI, Rep ID, etc) or click “Search” to see all members. Click on the “Download” button to download the latest statement.



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.



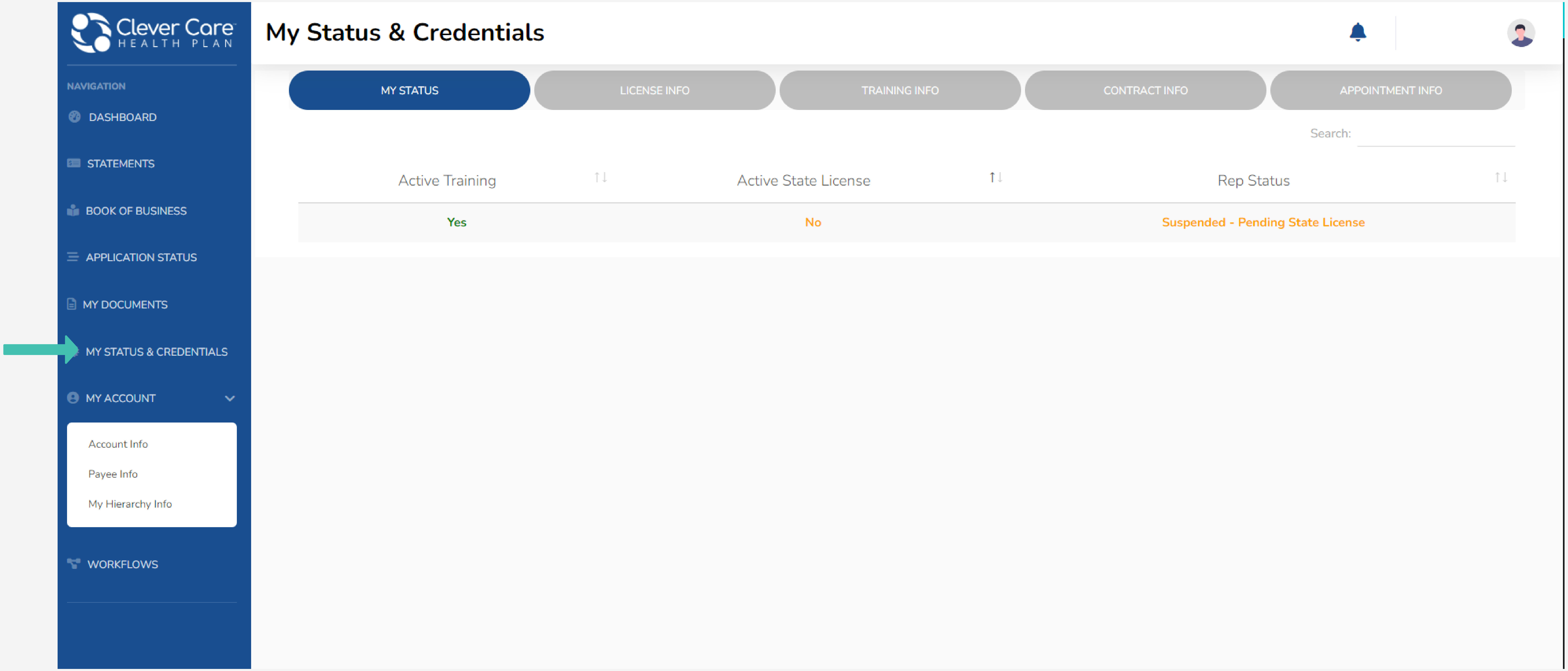
Under “My Account” you can view or edit account info such as your address, or payee information. Clicking on “My Account” opens two sub-menu items: “Account Info” and “Payee Info”



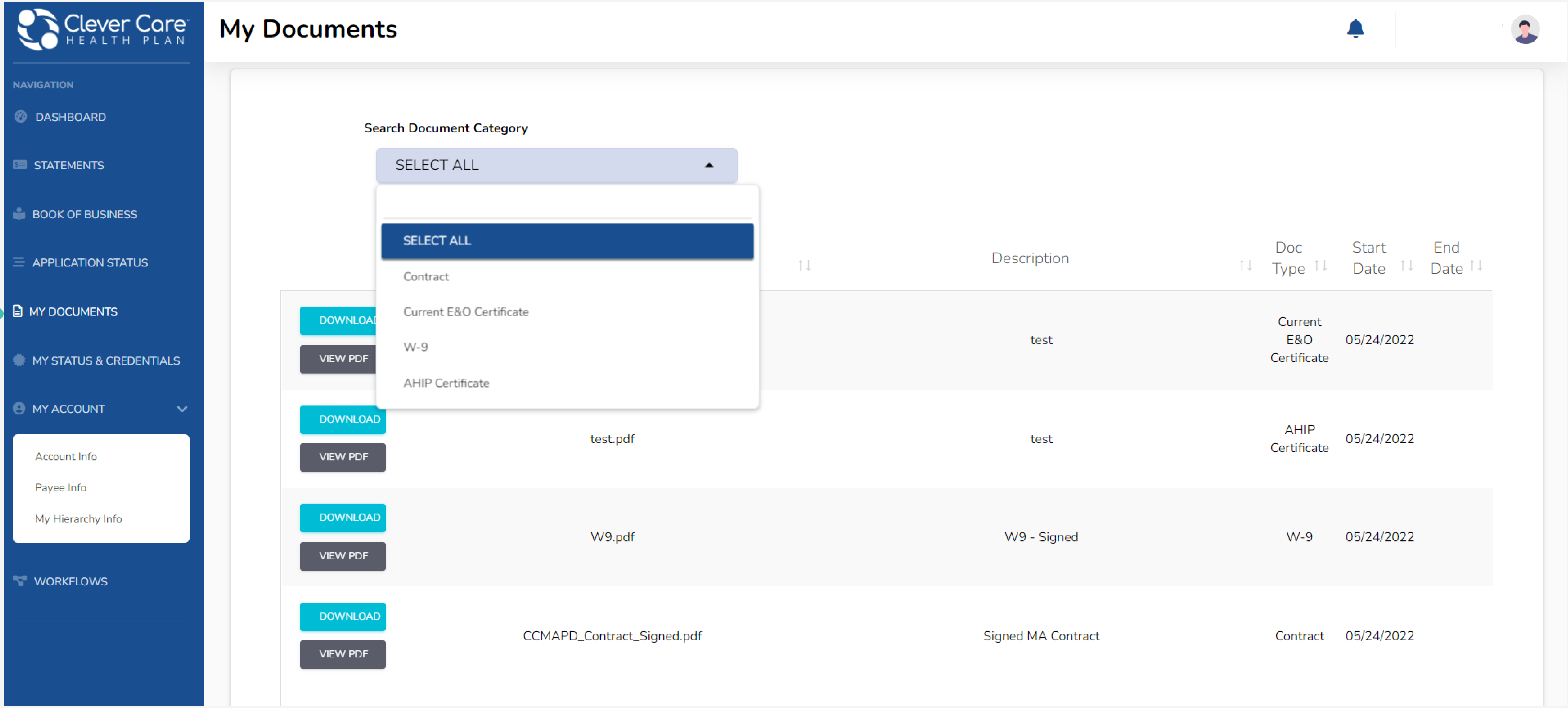
My Credentials &Documents

- 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”



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



Clever Care HEALTH PLAN

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.

Contract question?

Commission statement question?

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

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