

# Miramar:Agent Agent User Guide

Rev. 4/2023

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## I. INTRODUCTION

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*This document is housed on the Miramar:Agent Knowledge Base for Agents (<https://miramar-agent.com/KnowledgeBase/Article?kb=5>).*

Miramar:Agent is a web-based, multi-tenant software solution helping agents complete all steps so they are ready to sell Medicare, Exchange, and other health plans managed in the system. Miramar:Agent assists agents and organizations in the facilitation of their Program training and overall organization. Miramar:Agent assists agents in keeping track of their Agent Appointments, relevant documentation, group affiliations and eligible licenses for programs carried out within the platform. Miramar agent also helps agent stay informed about their Ready to Sell status with organizations that present this information within the platform as well as communicate within their organizations with our messaging feature.

Information in this User Guide covers all agent-facing functions and features of Miramar:Agent. Your available features and services may vary.

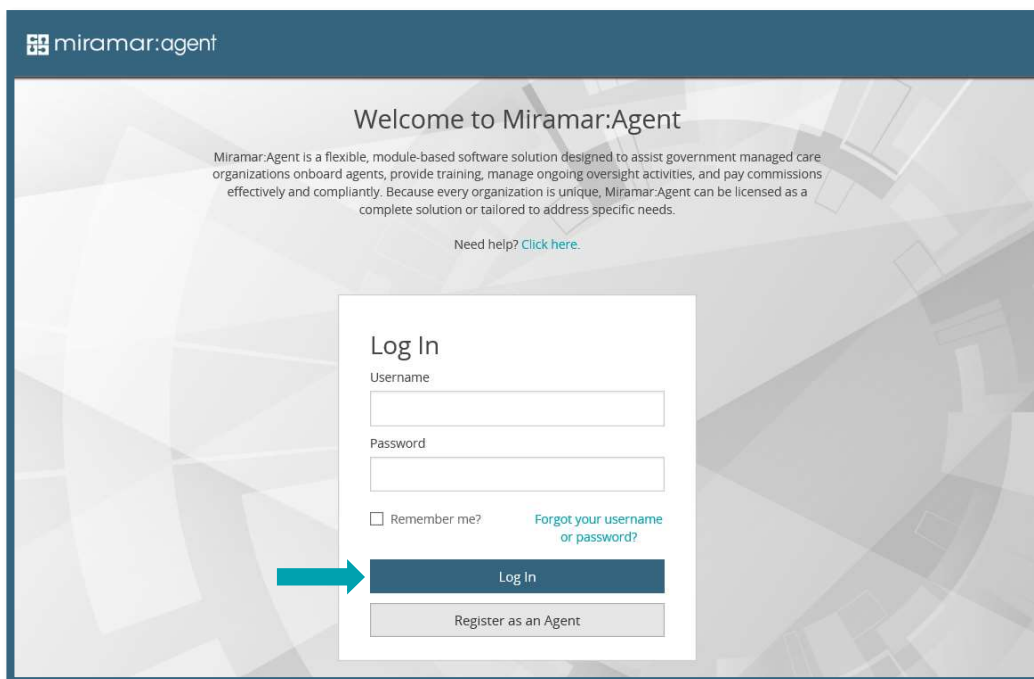
## II. GETTING STARTED

### ACCESSING THE SYSTEM

As a Miramar:Agent user, you will only ever need one set of login credentials from which you can access plans you have been granted access to in the system. To log in to your account, go to [www.miramar-agent.com](http://www.miramar-agent.com) and enter your username and password on the main landing screen. Click **Log In**.



**TEAM SUPPORT:** Logins are NOT carrier/plan or program specific. Returning users will use their existing username and password to access any additional programs they need to complete.

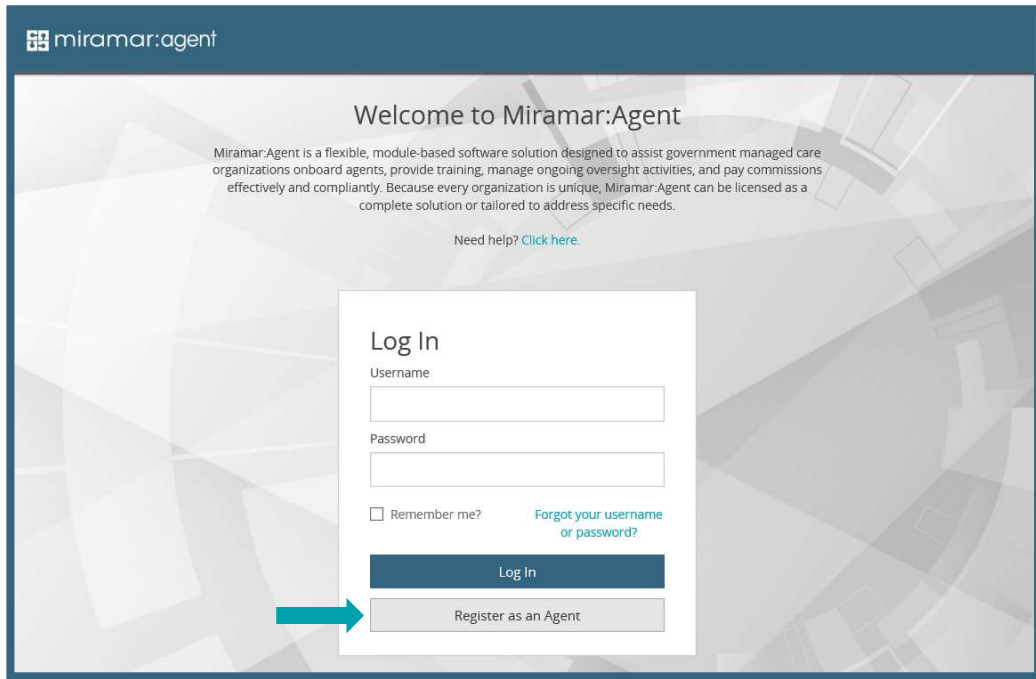


The screenshot shows the Miramar:Agent login interface. At the top left is the 'miramar:agent' logo. The main heading is 'Welcome to Miramar:Agent'. Below this is a paragraph describing the software as a flexible, module-based solution for government managed care organizations. A link 'Need help? Click here.' is provided. The central 'Log In' form contains fields for 'Username' and 'Password', a 'Remember me?' checkbox, and a 'Forgot your username or password?' link. A teal arrow points to the 'Log In' button. Below the login button is a 'Register as an Agent' button.



## How do I register as a new agent?

First-time users will need to register as an agent in the system. Click on **Register as an Agent**.

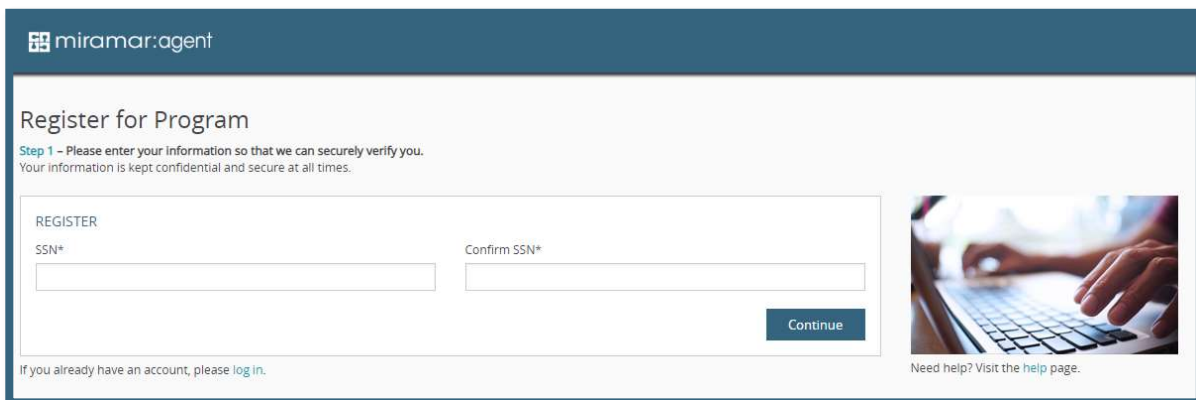


The image shows the Miramar:Agent welcome screen. At the top, it says "Welcome to Miramar:Agent". Below this, a paragraph describes the software as a flexible, module-based solution for government managed care organizations. A link "Need help? Click here." is provided. In the center, there is a "Log In" form with fields for "Username" and "Password", a "Remember me?" checkbox, and a link "Forgot your username or password?". Below the login form is a "Log In" button and a "Register as an Agent" button. A red arrow points to the "Register as an Agent" button.

First, you will be asked to enter your Social Security Number (SSN). SSN is the unique identifier for users in the system. This step will check all existing users to verify the SSN entered does not already exist in a profile.

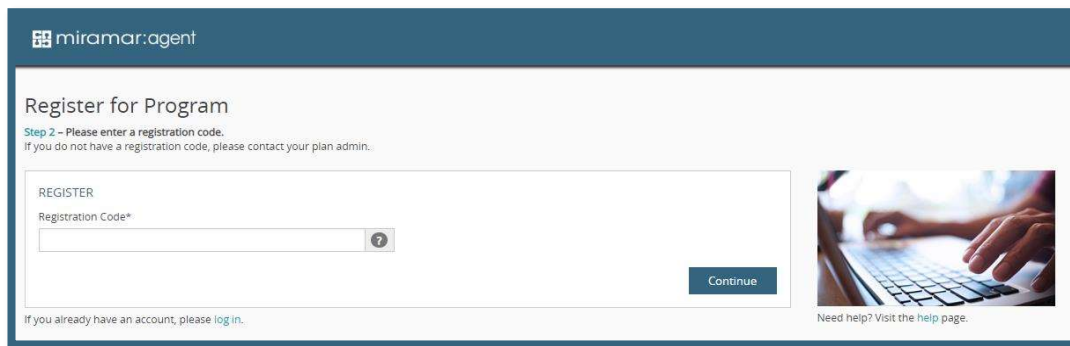


**IMPORTANT NOTE:** Failure to use a valid SSN could result in the inability to successfully complete a program, as the SSN is used for certain actions such as background checks.



The image shows the Miramar:Agent "Register for Program" screen. It includes a heading "Register for Program" and a sub-heading "Step 1 - Please enter your information so that we can securely verify you. Your information is kept confidential and secure at all times." Below this, there is a "REGISTER" section with two input fields: "SSN\*" and "Confirm SSN\*". A "Continue" button is located to the right of the "Confirm SSN\*" field. At the bottom left, there is a link "If you already have an account, please log in." At the bottom right, there is a link "Need help? Visit the help page." and a small image of hands typing on a laptop.

Agents who were given a Registration Code by their carrier or upline will enter the code immediately following the SSN validation. If you are not asked to enter a Registration Code, you were pre-enrolled into a program.



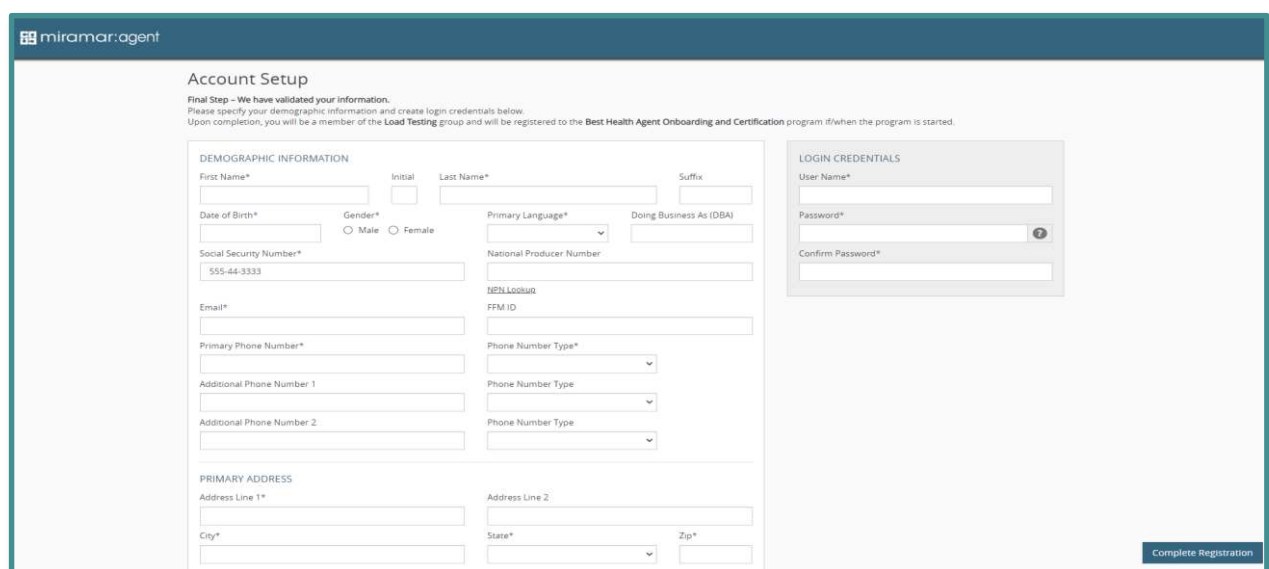
Enter your demographic information, a username and password. All fields marked with an asterisk (\*) are required. Click **Complete Registration** once you have completed the form. Once you have completed registration, you will need to verify your email address prior to logging in.



**IMPORTANT NOTE:** For security purposes, your SSN may not be used as your username.

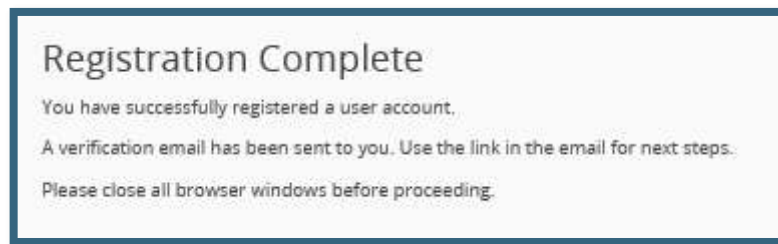


**HINT:** Passwords are required to contain a minimum of eight characters with at least one uppercase letter, one lowercase letter, one number, and one special character. Example: Password1#



### How do I verify my email address?

New users, and existing users who have not already done so, will need to verify their email address. Verifying an email address allows Miramar:Agent to communicate with users in the event that they forget their username or password. Upon completing registration or logging in for the first time since email verification has been required, you will see the following message.



**IMPORTANT:** Be sure to close all of your browser windows prior to opening the verification email. If you do not close your browser windows, you may receive an error message.

You will receive an email with a link to verify your email address within 30 minutes (generally this happens immediately). If you do not receive the email, please be sure to check your spam or junk folders.



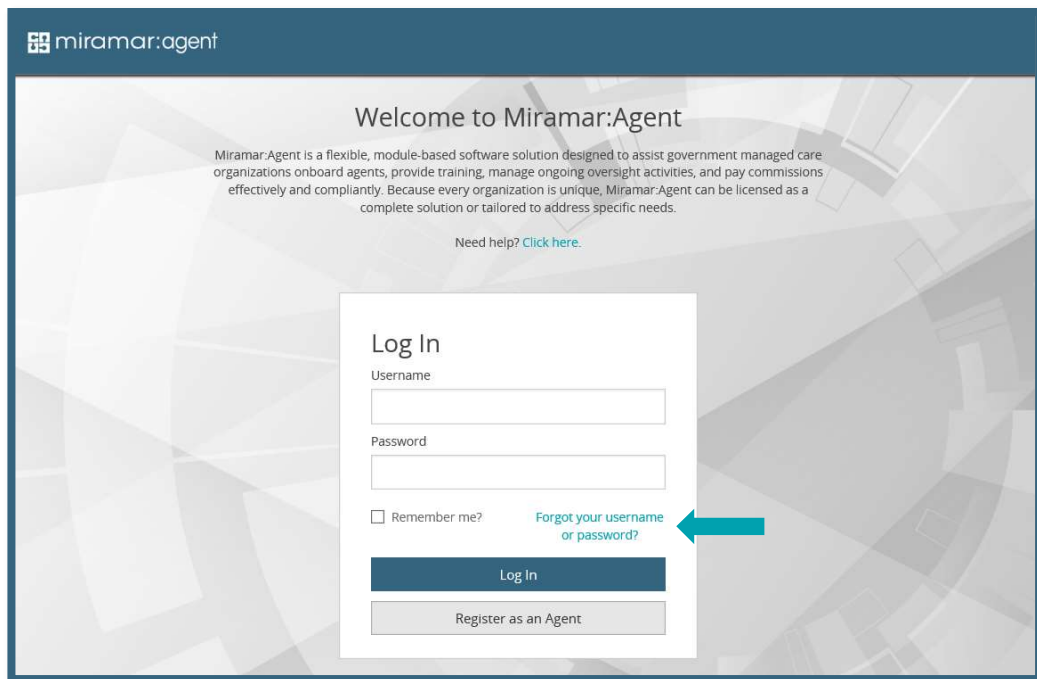
**IMPORTANT:** The link in the email is a one-time URL and will generally expire after 24 hours of receipt. If you received an error message after initially clicking the link, you will need to log in again to initiate a new verification email.

Once verified, click the **log in** link and you will be able to log in using your credentials on the Miramar:Agent homepage.

### How do I retrieve my username or password?

If you've forgotten your username or password, you can retrieve them directly to your email after completing the one-time email verification process. Verifying an email address allows Miramar:Agent to communicate with users in the event that they forget their username or password. If you have not yet verified your email address, continue to follow the instructions on the next page.

Click on **Forgot your username or password?** and enter your email address when prompted. Click **Forgot Password** or **Forgot Username**, depending on which you need to recover.



**miramar:agent**

## Welcome to Miramar:Agent

Miramar:Agent is a flexible, module-based software solution designed to assist government managed care organizations onboard agents, provide training, manage ongoing oversight activities, and pay commissions effectively and compliantly. Because every organization is unique, Miramar:Agent can be licensed as a complete solution or tailored to address specific needs.

Need help? [Click here.](#)

### Log In

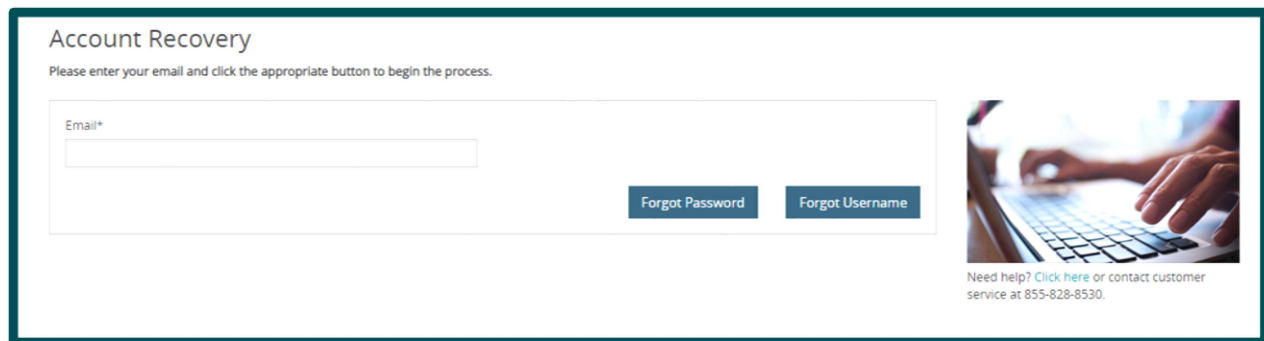
Username

Password

☐ Remember me? [Forgot your username or password?](#)

**Log In**

Register as an Agent




## Account Recovery


Please enter your email and click the appropriate button to begin the process.

Email\*

**Forgot Password** **Forgot Username**




Need help? [Click here](#) or contact customer service at 855-828-8530.

 **IMPORTANT:** If you have already verified your email address, you will receive an email with instructions for retrieving your password or username.

*Forgot Username or Password*

Enter your E-mail address and click **Continue**.

 **QUICK TIP:** If you have not yet verified your email address you will need to contact the Helpdesk to answer additional questions to verify your identity and update your password. To contact the Helpdesk, create a ticket by clicking [here](#) or call using the plan-specific phone number provided by your plan representative.



**NOTE:** Passwords are required to contain a minimum of eight characters with at least one uppercase letter, one lowercase letter, one number, and one special character. Example: Password1#

Once you have successfully reset your password, click **log in** to return to the login page.







## OPTIMIZING YOUR EXPERIENCE

In order to optimize your certification experience in Miramar:Agent, please ensure you are using one of our suggested browsers and have enabled pop-ups in your browser settings.

### Suggested Browsers




Compatibility for Miramar:Agent is tested with the following browsers:

-  Google Chrome
-  Mozilla Firefox
-  Microsoft Edge
-  Safari

Our team uses **Microsoft Edge**. It is important you have enabled pop-ups before you access Miramar:Agent.



**QUICK TIP:** Restrictive security software can interfere with the ability to communicate training results to the learning management system from your browser. Click here for more information about what sites to set as secure.

-  [https://\\*.teamsupport.com](https://*.teamsupport.com)
-  [https://\\*.miramar-agent.com](https://*.miramar-agent.com)
-  <https://lms.gormanhealthgroup.com>

### Enabling Pop-Ups

It is important you have enabled pop-ups before you access Miramar:Agent, as trainings will pop up in a second tab or window.



**TEAM SUPPORT:** Click [here](#) for more information on how to enable pop-ups in FireFox, Google, and Chrome.

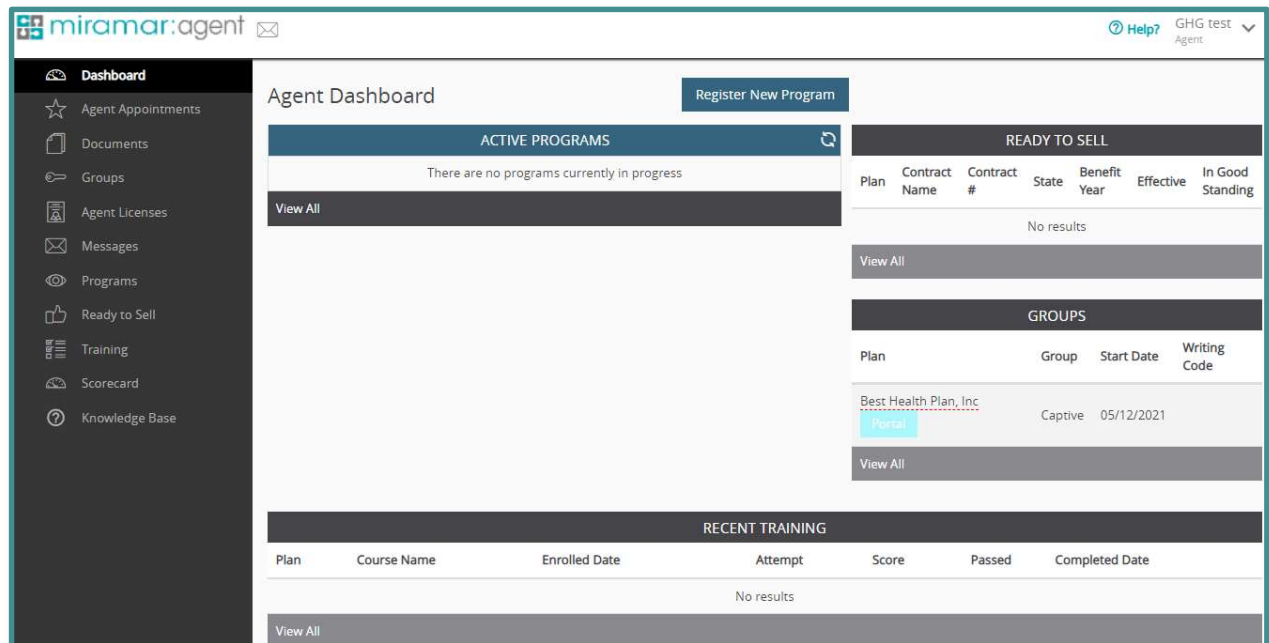
### III. AGENT DASHBOARD

The Agent Dashboard is the hub of Miramar:Agent while also providing a snapshot of your current activity in the system. On your dashboard, you will see widgets for the following current information:

- Active programs
- Ready to sell information (current and previous benefit years)
- Group affiliations
- Recent training information

To view the full index of any of the dashboard widgets, click **View All**. From the individual index, you will be able to search and filter the available information.

From the dashboard, you can action any active program steps, edit your profile information, and access any of the tabs from your left side navigation menu.



The screenshot shows the Miramar:Agent dashboard. On the left is a dark sidebar with a navigation menu including: Dashboard, Agent Appointments, Documents, Groups, Agent Licenses, Messages, Programs, Ready to Sell, Training, Scorecard, and Knowledge Base. The main content area is titled "Agent Dashboard" and includes a "Register New Program" button. It features four primary widgets:
 

- ACTIVE PROGRAMS:** A table with the message "There are no programs currently in progress" and a "View All" link.
- READY TO SELL:** A table with columns: Plan, Contract Name, Contract #, State, Benefit Year, Effective, and In Good Standing. It shows "No results" and a "View All" link.
- GROUPS:** A table with columns: Plan, Group, Start Date, and Writing Code. It lists "Best Health Plan, Inc" with a "Portal" link, "Captive" group, and "05/12/2021" start date. It includes a "View All" link.
- RECENT TRAINING:** A table with columns: Plan, Course Name, Enrolled Date, Attempt, Score, Passed, and Completed Date. It shows "No results" and a "View All" link.

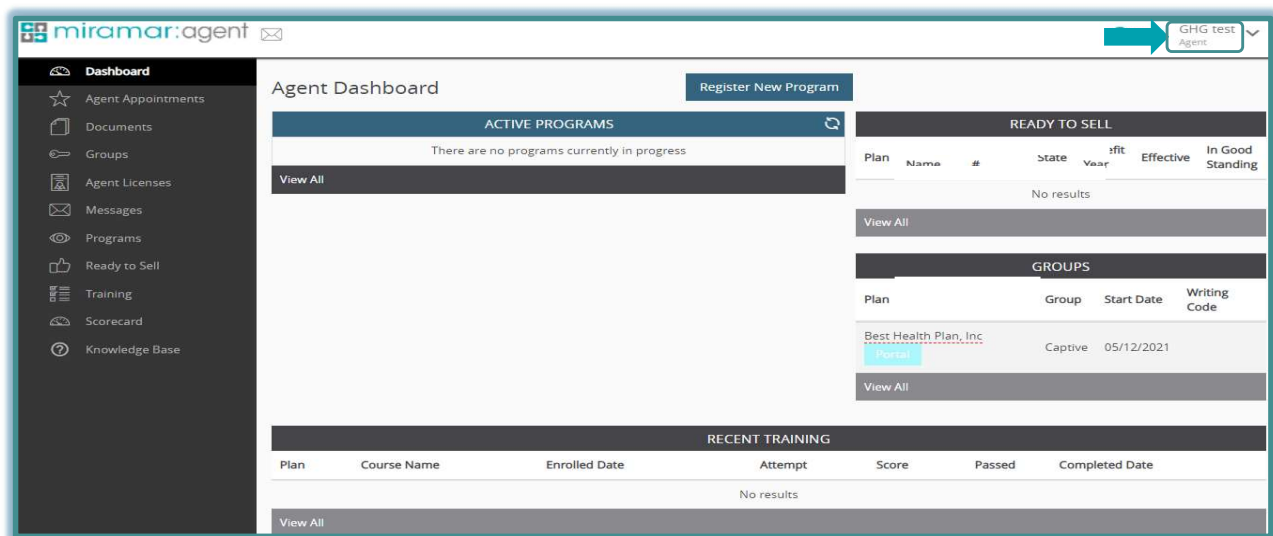
 The top right of the dashboard shows a "Help?" icon and a user profile for "GHG test Agent".

## PROFILE MANAGEMENT

### How do I update my profile information?

You can update your profile demographic information, change your account password, and answer at any point in time after completing registration.

To do so, move your cursor to the upper right corner of your screen and click the down arrow that appears to the right of your name. A drop-down menu will be displayed. Select **Profile**.



The screenshot shows the 'miramar:agent' interface. In the top right corner, a user profile dropdown menu is open, showing 'GHG test Agent' with a downward arrow. The main dashboard area is titled 'Agent Dashboard' and includes a 'Register New Program' button. It features four main sections: 'ACTIVE PROGRAMS' (with a message 'There are no programs currently in progress' and a 'View All' link), 'READY TO SELL' (with a table of plans and a 'View All' link), 'GROUPS' (with a table of groups and a 'View All' link), and 'RECENT TRAINING' (with a message 'No results' and a 'View All' link). A left sidebar contains navigation links for Dashboard, Agent Appointments, Documents, Groups, Agent Licenses, Messages, Programs, Ready to Sell, Training, Scorecard, and Knowledge Base.

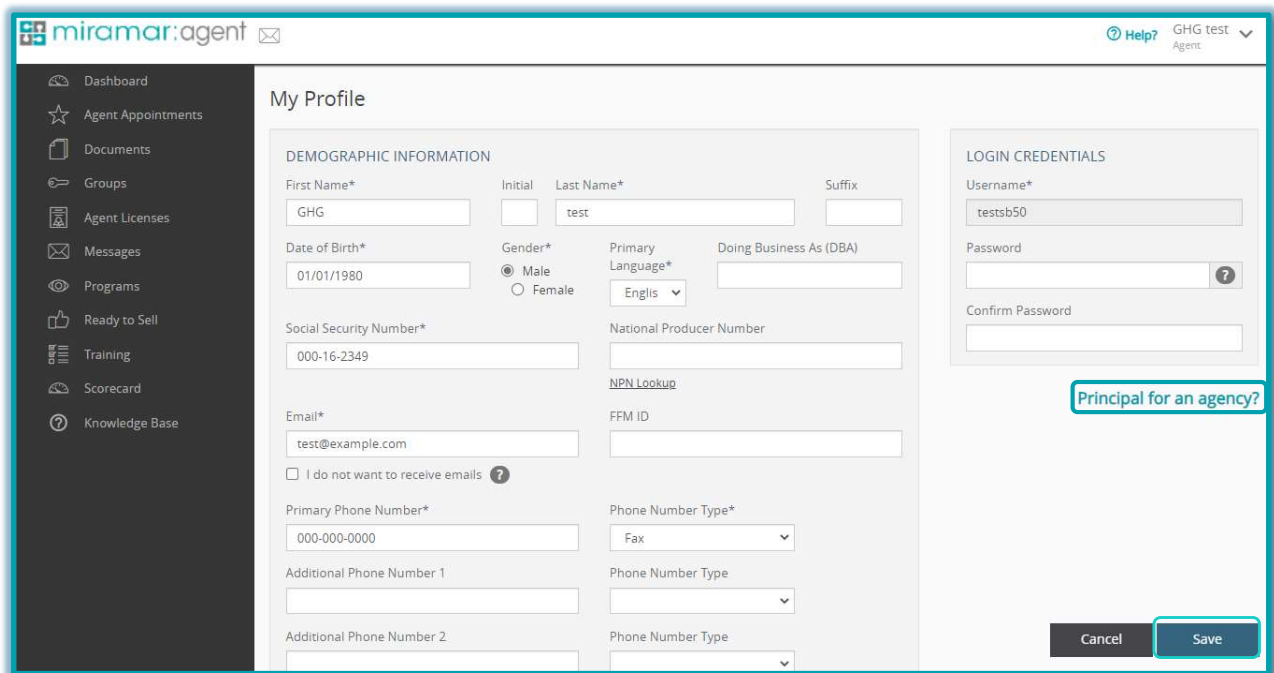
Plan	Name	#	State	Year	Effective	In Good Standing
No results						

Plan	Group	Start Date	Writing Code
Best Health Plan, Inc	Captive	05/12/2021	

Plan	Course Name	Enrolled Date	Attempt	Score	Passed	Completed Date
No results						

Once you've made the desired changes to your profile, be sure to click **Save** at the bottom of the screen before you leave the page.





**miramar:agent** Help? GHG test Agent

**My Profile**

**DEMOGRAPHIC INFORMATION**

First Name\* GHG Initial Last Name\* test Suffix

Date of Birth\* 01/01/1980 Gender\* ☒ Male ☐ Female Primary Language\* English Doing Business As (DBA)

Social Security Number\* 000-16-2349 National Producer Number

Email\* test@example.com FFM ID

☐ I do not want to receive emails

Primary Phone Number\* 000-000-0000 Phone Number Type\* Fax

Additional Phone Number 1 Phone Number Type

Additional Phone Number 2 Phone Number Type

**LOGIN CREDENTIALS**

Username\* testsb50

Password

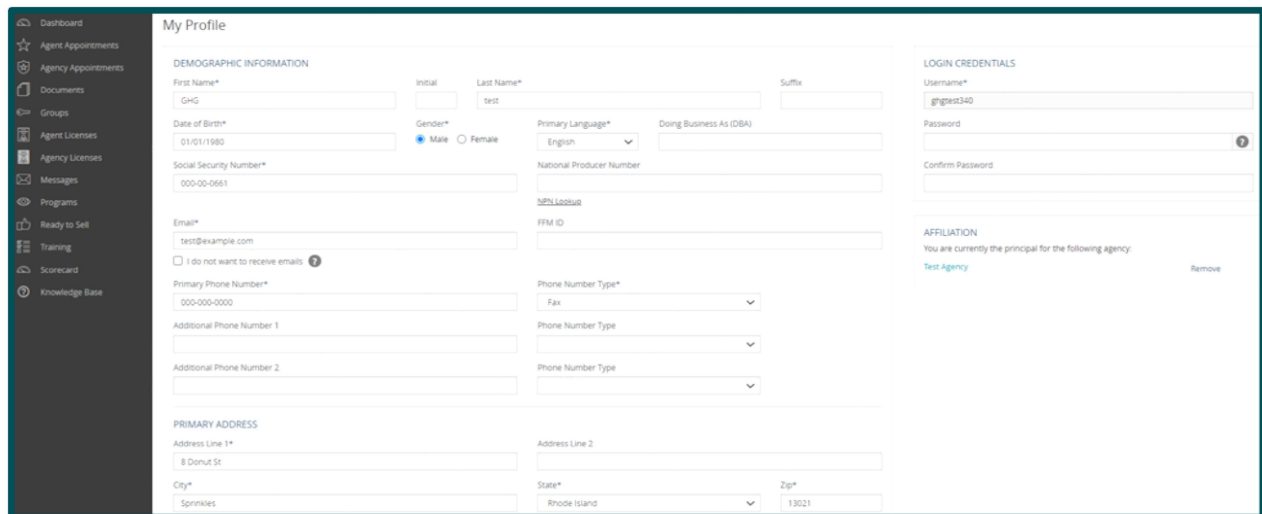
Confirm Password

**Principal for an agency?**

Cancel Save

## How do I register as the principal of an agency?

If you are an agency principal, you must register as an individual before you will be allowed to register as the principal of an agency. Once you have completed your individual profile, proceed to the *My Profile* page and click **Principal for an agency?**



**My Profile**

**DEMOGRAPHIC INFORMATION**

First Name\* GHG Initial Last Name\* test Suffix

Date of Birth\* 01/01/1980 Gender\* ☒ Male ☐ Female Primary Language\* English Doing Business As (DBA)

Social Security Number\* 000-00-0661 National Producer Number

Email\* test@example.com FFM ID

☐ I do not want to receive emails

Primary Phone Number\* 000-000-0000 Phone Number Type\* Fax

Additional Phone Number 1 Phone Number Type

Additional Phone Number 2 Phone Number Type

**PRIMARY ADDRESS**

Address Line 1\* 8 Donut St Address Line 2

City\* Sprinkles State\* Rhode Island Zip\* 13021

**LOGIN CREDENTIALS**

Username\* ghgtest340

Password

Confirm Password

**AFFILIATION**

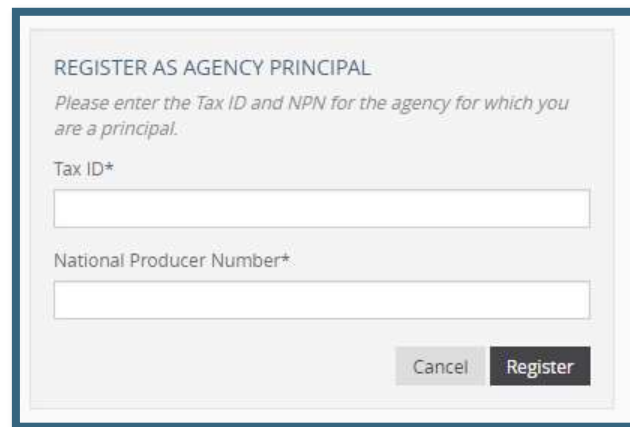
You are currently the principal for the following agency:

Test Agency Remove

Enter the required agency information (Tax ID and National Producer Number (NPN)). Click **Register**.



**IMPORTANT NOTE:** You must provide the *agency* NPN and *agency* Federal Employer Identification Number (FEIN). Both are validated during the initial license check. If they do not match the values provided by the National Producer Insurance Registry (NIPR), no data will be imported, and you will not be able to proceed in your program without intervention.



REGISTER AS AGENCY PRINCIPAL

Please enter the Tax ID and NPN for the agency for which you are a principal.

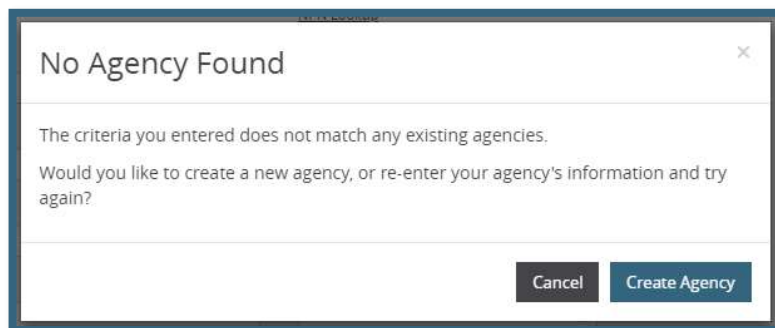
Tax ID\*

National Producer Number\*

Cancel Register

*New agency in Miramar:Agent*

If the agency does not already exist in Miramar:Agent, a new agency will need to be created. Click **Create Agency**.



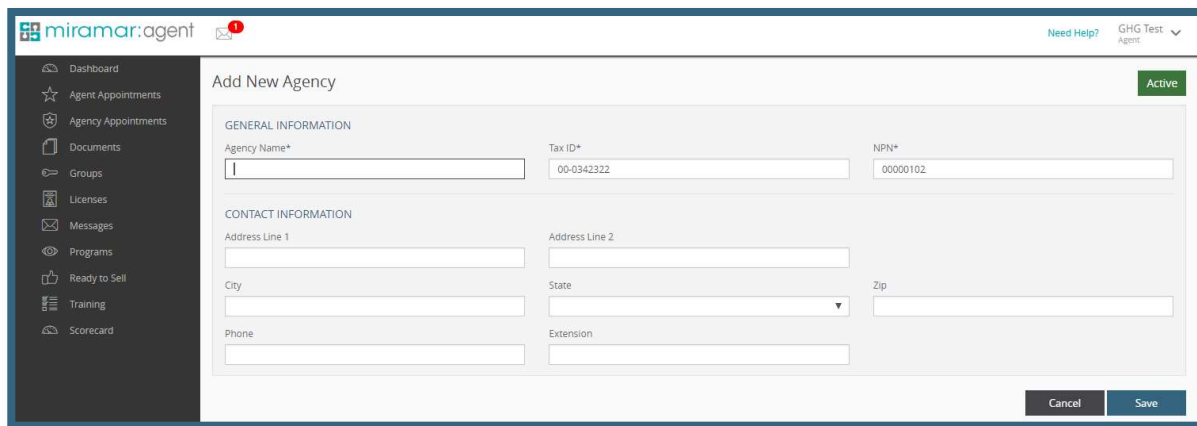
No Agency Found

The criteria you entered does not match any existing agencies.

Would you like to create a new agency, or re-enter your agency's information and try again?

Cancel Create Agency

You will be prompted to fill in the name of the agency as well as option contact information. Click **Save** once you have completed the required fields.

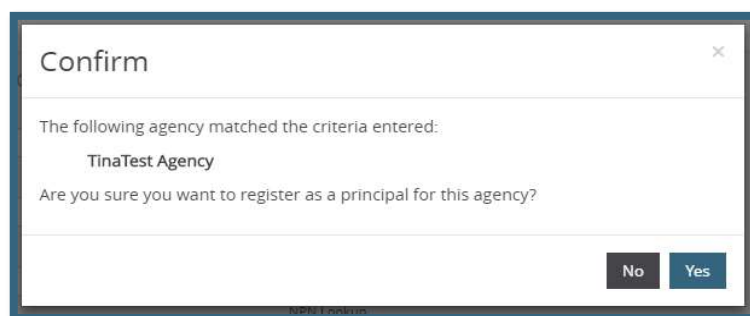


Once the agency has successfully saved, you will see the message below at the bottom of your screen.



### *Existing agency in Miramar:Agent*

If the agency has already been established in Miramar:Agent, you will see the confirmation pop-up below. Once you have confirmed the name showing on the form matches the agency you are attempting to register, click **Yes**.



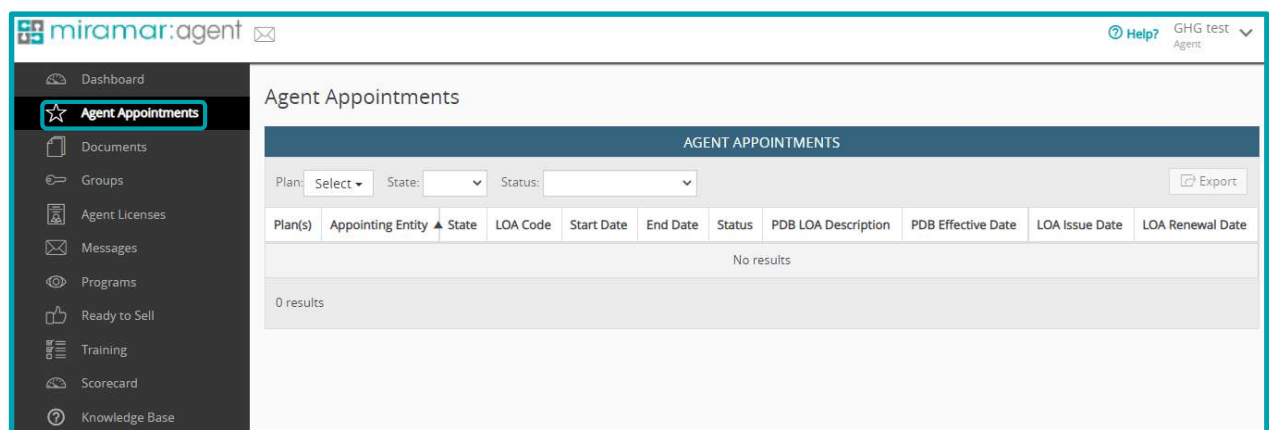
Once you have confirmed, you will see the message below at the bottom of your screen.



## AGENT APPOINTMENTS

To view your agent appointments, click **Agent Appointments** in the Dashboard menu to the left of the screen. This will provide a snapshot of your appointments. To see all of your appointments, click **View All** in the gray bar below the displayed appointments.

 **IMPORTANT NOTE:** Appointment information is refreshed on a daily basis from NIPR.



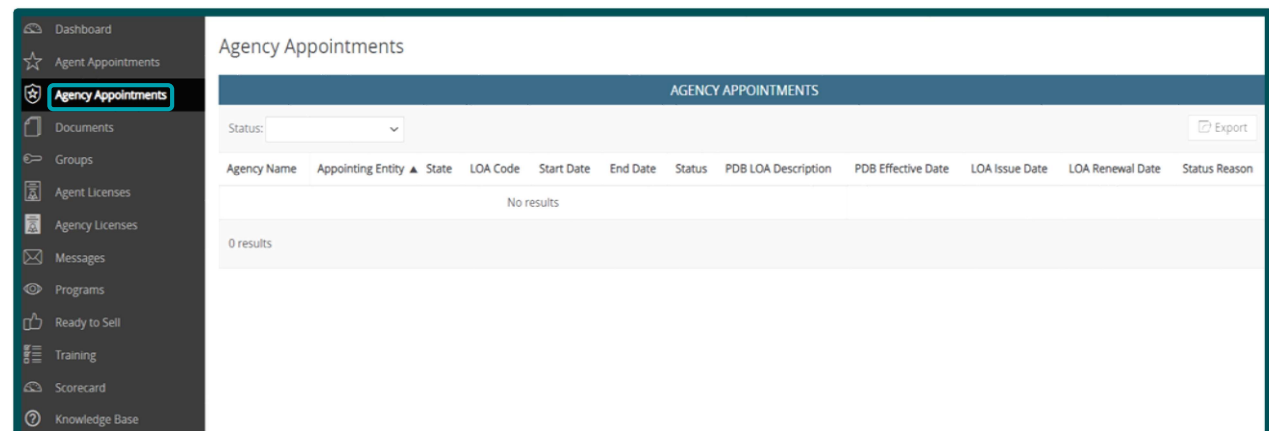
**Agent Appointments**

Plan:  Select State:  Status:

Plan(s)	Appointing Entity	State	LOA Code	Start Date	End Date	Status	PDB LOA Description	PDB Effective Date	LOA Issue Date	LOA Renewal Date
No results										
0 results										

## AGENCY APPOINTMENTS

If you are registered as a principal of an agency and have gone through an agency program that included a license check step, you will be able to view any appointments associated with that agency. Click **Agency Appointments** in the Dashboard menu to the left of the screen to view your agency appointments.




**Agency Appointments**

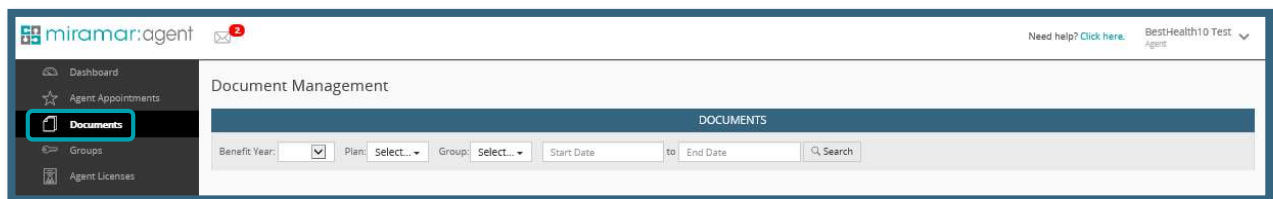
Status:

Agency Name	Appointing Entity	State	LOA Code	Start Date	End Date	Status	PDB LOA Description	PDB Effective Date	LOA Issue Date	LOA Renewal Date	Status Reason
No results											
0 results											

## DOCUMENTS

Documents can include training certificates, completed forms, uploaded E&O, or any other documents your plan saved during your program completion or requested to be uploaded. To view your uploaded and saved documents, click into  Documents in the Dashboard menu to the left of the screen.

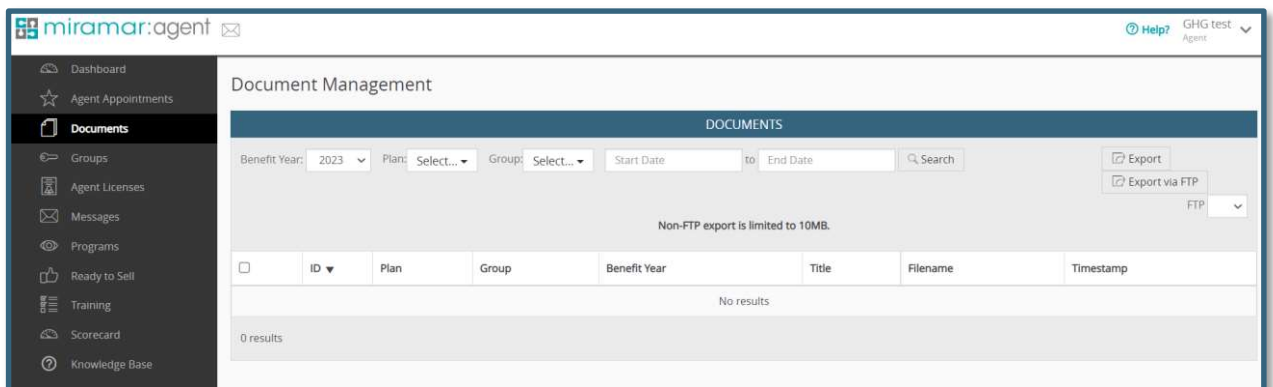
Upon initially clicking into the Documents section, you will not see any documents available. To view all available documents, click **Search**. You can also search by various fields, including Benefit Year, Plan, Group, and date.



To view a document, click into the Document ID. You can also check off multiple documents to export at one time, by clicking **Export** in the top right corner.



**NOTE:** If a document requires review, you will see an icon next to the document title indicating its status. A green checkmark (✓), a red (X) indicates that it has been denied, and not yet reviewed will show no icon. If a document is denied users will receive a reason in reference to the denial in order to prompt them on what may need to be updated. You can hover over the icon to view the status description.



### How do I upload a certificate or document?

Document uploads generally take place within programs. Programs will prompt agents to upload documents as needed for verification within the program.



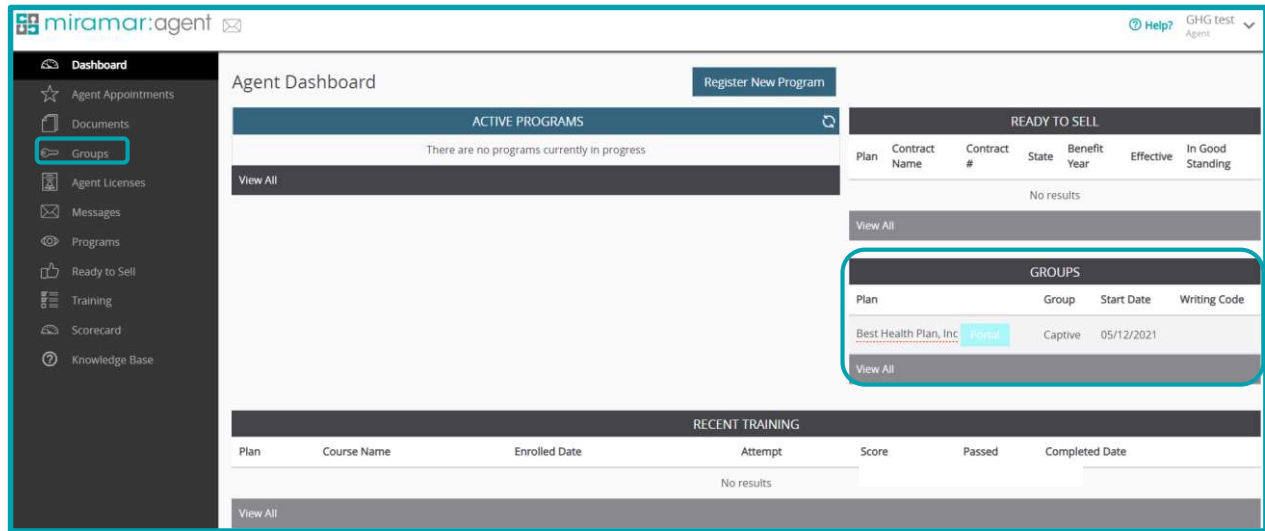
**IMPORTANT NOTE:** Documents you upload in a program are stored to a system that does not accept the below characters. If your file has one of these characters, rename before uploading. If your document has an extremely long name, you may also want to shorten it, as very long file paths may result in errors.

- Tilde (~)
- Number sign (#)
- Percent (%)
- Ampersand (&)
- Apostrophe (')
- Plus sign (+)
- Quotation mark (")
- Braces ({ })
- Backslash (\)

## GROUPS

Groups are used to categorize agents under different Plans. Groups are important because they can help determine different pathways in a plan's onboarding programs. Every agent associated with a Plan must belong to a group. Agents can be a part of more than one group.

To view a full history of your group affiliations for your plans, click **Groups** in the Dashboard menu to the left of the screen. The widget on your Dashboard will provide a snapshot of the groups with which you are currently associated.



**Agent Dashboard**

Register New Program

**ACTIVE PROGRAMS**

There are no programs currently in progress

View All

**READY TO SELL**

Plan	Contract Name	Contract #	State	Benefit Year	Effective	In Good Standing
No results						

View All

**GROUPS**

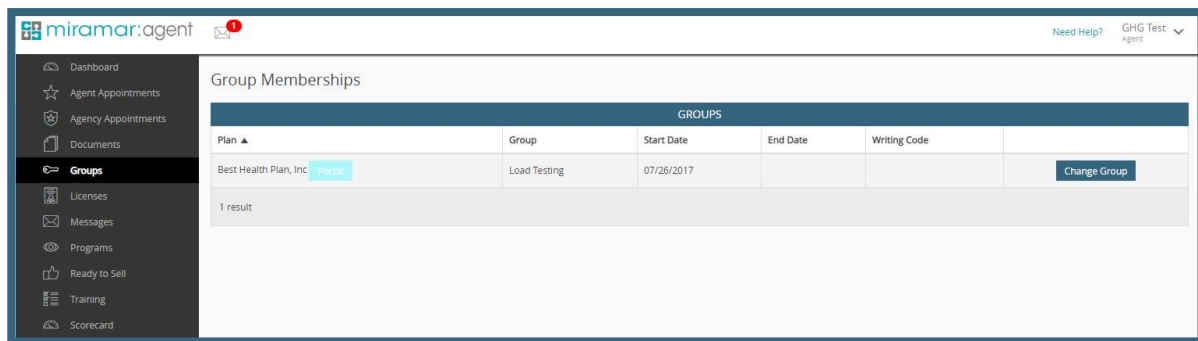
Plan	Group	Start Date	Writing Code
Best Health Plan, Inc.	Captive	05/12/2021	

View All

**RECENT TRAINING**

Plan	Course Name	Enrolled Date	Attempt	Score	Passed	Completed Date
No results						

View All



**Group Memberships**

**GROUPS**

Plan	Group	Start Date	End Date	Writing Code
Best Health Plan, Inc.	Load Testing	07/26/2017		

1 result

Change Group

## How do I request a group change?

If the group listed for a plan is incorrect and you want to request a group change, you will need to get the Group Code from a plan administrator. Please reach out to your plan and not Miramar:Agent support as the plan has to approve this change.



**NOTE:** The group code is NOT the same as a program registration PIN code. A PIN code is associated with a particular program and group, but a group code can be used to request a group change at any time and is static for that group.

Once you have the Group Code, click **Change Group** next to the group you wish to update.



Once you have clicked Change Group, a confirmation box will pop up on the screen, and you will be required to enter the Group Code. Click **Change Groups** to finalize the request. A green confirmation banner will appear at the bottom of your screen once you have completed the request.



**IMPORTANT NOTE:** Your request will be sent to a Plan Administrator to process. The group change will only be finalized once the Plan Administrator has approved the request.

Confirm

Are you sure you want to leave the **Load Testing** group?

If so, please specify the code of the group you'd like to switch to and click "Change Group".

Code\*

Cancel

Change Groups



## LICENSES

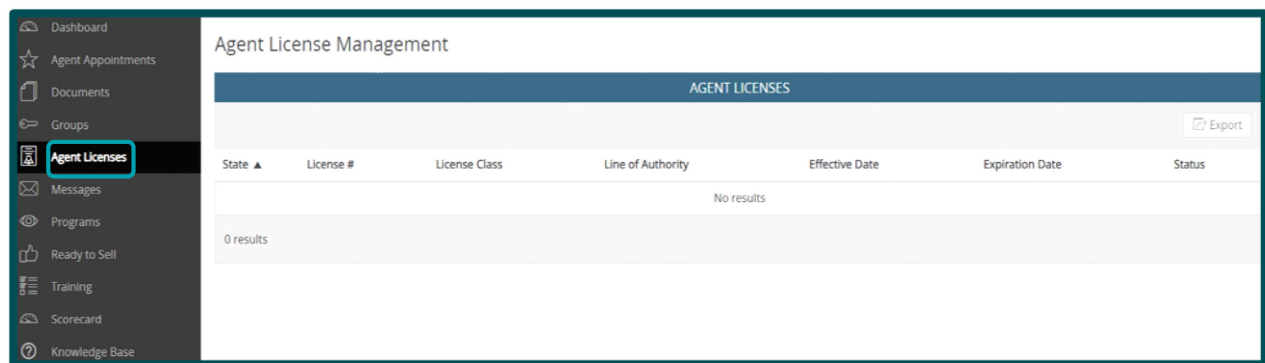
To view your licenses, click **Agent Licenses** in the Dashboard menu to the left of the screen.



**IMPORTANT NOTE:** License information is refreshed on a daily basis from NIPR.


You may utilize this index to monitor your licenses and track licenses with upcoming expiration dates. Licenses will show one of the following three statuses:

-  Active
-  Due Soon
-  Expired

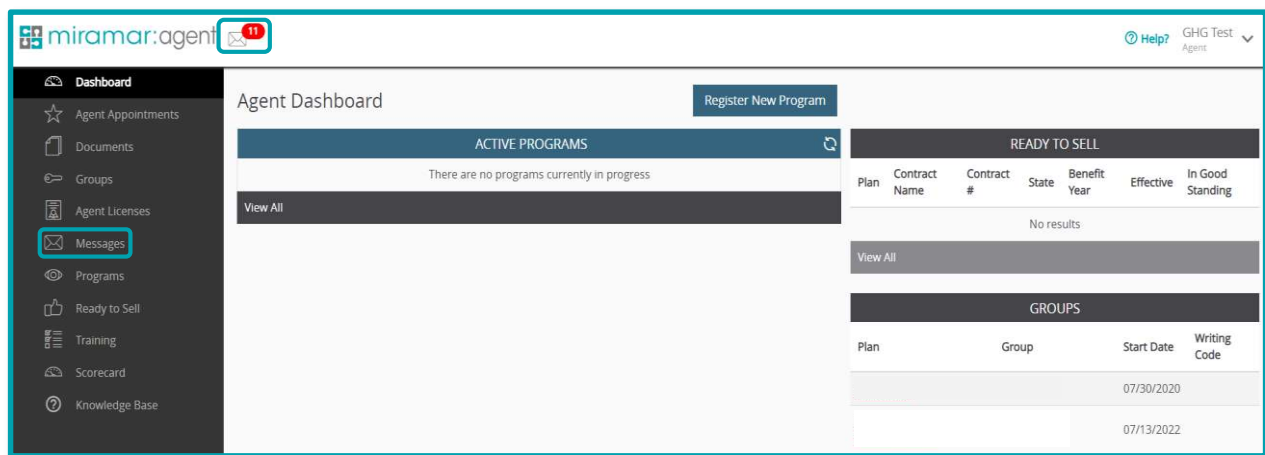


The screenshot shows the 'Agent License Management' page. On the left is a sidebar menu with options: Dashboard, Agent Appointments, Documents, Groups, **Agent Licenses** (highlighted), Messages, Programs, Ready to Sell, Training, Scorecard, and Knowledge Base. The main content area is titled 'Agent License Management' and contains a table header 'AGENT LICENSES' with an 'Export' button. The table has columns: State (with a dropdown arrow), License #, License Class, Line of Authority, Effective Date, Expiration Date, and Status. The table body shows 'No results' and '0 results' at the bottom.

## MESSAGES

The Messaging Center will be activated when you receive a message. To view your messages that have been sent to or from your plan, click into **Messages** on the Dashboard menu or into the *envelope icon*  at the top of the page.

The envelope icon at the top left of the Agent Dashboard will display in a red bubble how many unread messages you have.



**Agent Dashboard**

Register New Program

**ACTIVE PROGRAMS**

There are no programs currently in progress

View All

**READY TO SELL**


Plan	Contract Name	Contract #	State	Benefit Year	Effective	In Good Standing
No results						

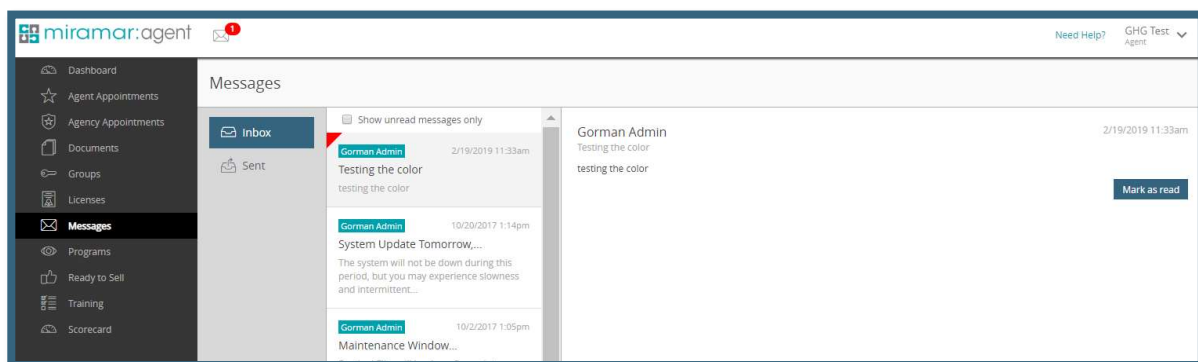
View All

**GROUPS**

Plan	Group	Start Date	Writing Code
		07/30/2020	
		07/13/2022	

From your messaging center, you can mark messages as read by clicking **Mark as read**. You can also sort to only see your unread messages or view your sent messages.

 **NOTE:** Some messages are sent as informational only and will not allow a reply.



**Messages**

Show unread messages only

**Inbox**

Sent

**Gorman Admin** 2/19/2019 11:33am

Testing the color

testing the color

**Gorman Admin** 10/20/2017 1:14pm

System Update Tomorrow...

The system will not be down during this period, but you may experience slowness and intermittent...

**Gorman Admin** 10/2/2017 1:05pm

Maintenance Window...

**Gorman Admin** 2/19/2019 11:33am

Testing the color

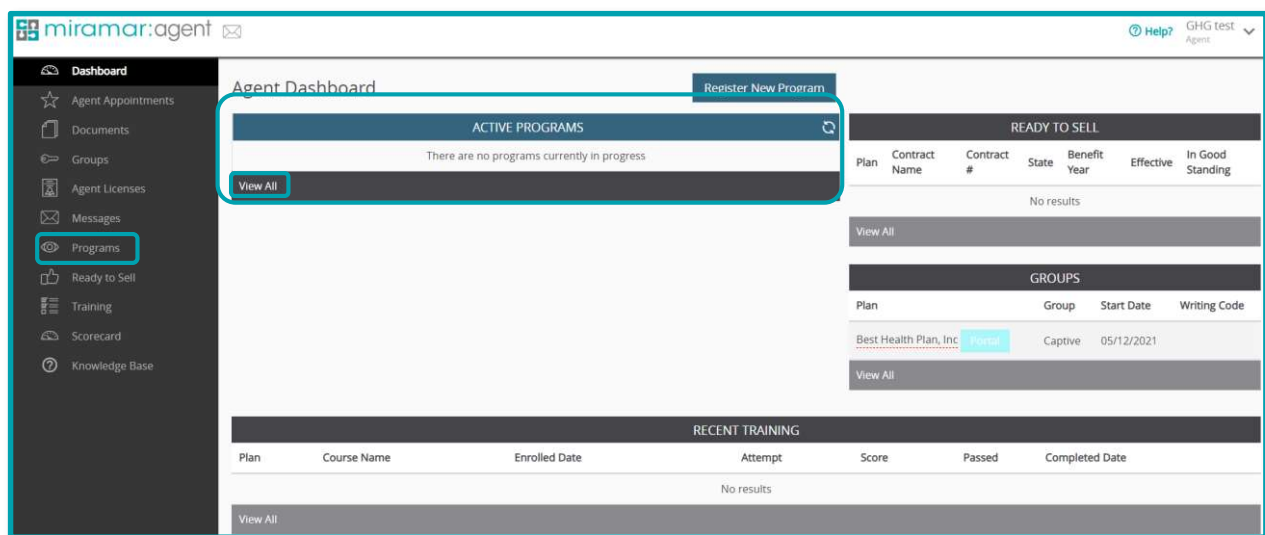
testing the color

Mark as read

## PROGRAMS

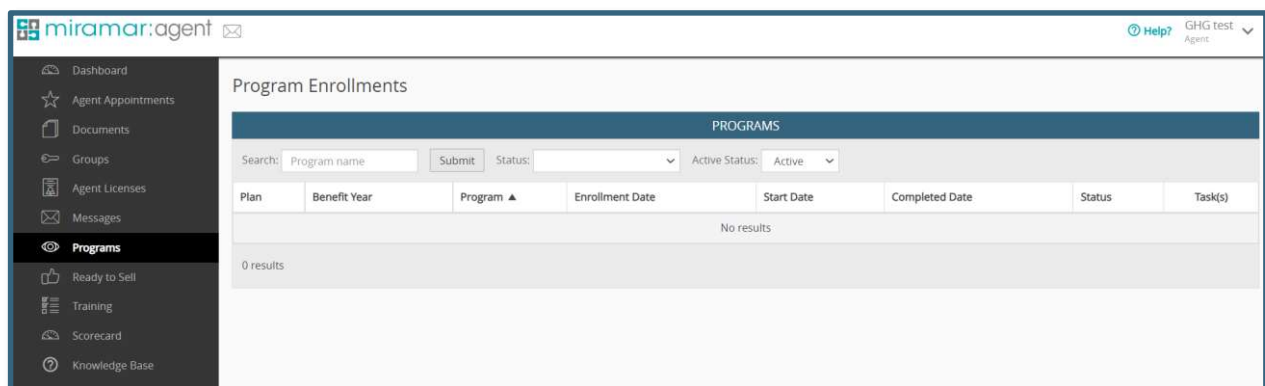
The not started and in-progress programs will appear on the Dashboard under *Active Programs*. This is where you will be able to action your program steps.

To view all programs, including completed or frozen programs, click **View All** under the Active Programs widget or **Programs** from the Dashboard menu.



The screenshot shows the 'miramar:agent' interface. The left sidebar has a 'Programs' menu item highlighted. The main content area is titled 'Agent Dashboard'. A 'Register New Program' button is at the top right. Below it, the 'ACTIVE PROGRAMS' section displays 'There are no programs currently in progress' and a 'View All' button. To the right, there are sections for 'READY TO SELL' (with columns: Plan, Contract Name, Contract #, State, Benefit Year, Effective, In Good Standing) and 'GROUPS' (with columns: Plan, Group, Start Date, Writing Code). The 'RECENT TRAINING' section at the bottom has columns: Plan, Course Name, Enrolled Date, Attempt, Score, Passed, Completed Date. All these sections currently show 'No results'.

From the *Program Enrollments* index, you can search by program name and filter by program status. From this index, you have insight into when you were enrolled in the program, when you started and completed the program, as well as what your current status is within the program. Additionally, you can action the program by clicking into what is listed in the *Tasks* column.



The screenshot shows the 'Program Enrollments' page in the 'miramar:agent' interface. The left sidebar has a 'Programs' menu item highlighted. The main content area is titled 'Program Enrollments'. It features a search bar with 'Program name' and a 'Submit' button, along with dropdown filters for 'Status' and 'Active Status'. Below the search bar is a table with the following columns: Plan, Benefit Year, Program, Enrollment Date, Start Date, Completed Date, Status, and Task(s). The table currently displays '0 results'.







**NOTE:** For more information on how to navigate within a program, see the section on *Program Navigation*.

## READY TO SELL

Agents who have been granted Ready to Sell (RTS) status have been deemed eligible to produce by the Plan in question by completing all prerequisite steps for the Plan's program. Not all Plans utilize Ready to Sell status within Miramar:Agent.

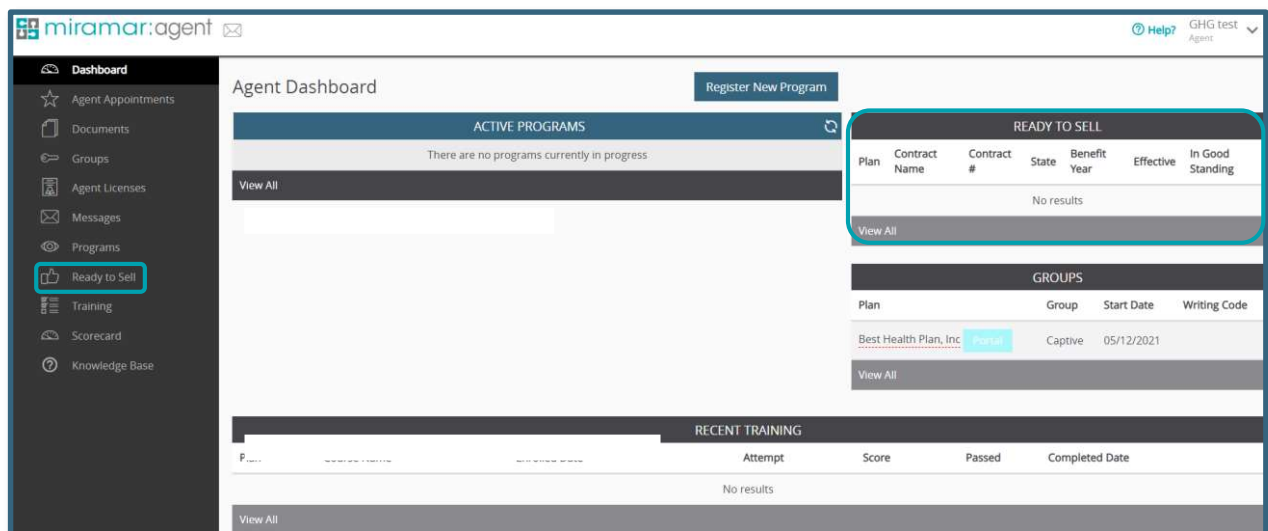
To view a snapshot of the contracts for which you are Ready to Sell (RTS) for the current and upcoming benefit, view the *Ready to Sell* widget on the right side of the Dashboard. To view a full RTS history, click into **View All** from the RTS widget or **Ready to Sell** from the Dashboard menu. Accepted RTS status (Good Standing) is displayed with a green check mark (✓), while declined status is displayed with a red x mark (✗), status can also display as N/A for not available.

The RTS date is assigned within a program at the point at which required steps are completed as determined by the plan. RTS status is unique for each of the following:

-  Plan / Contract
-  State
-  Benefit Year
-  Effective Date

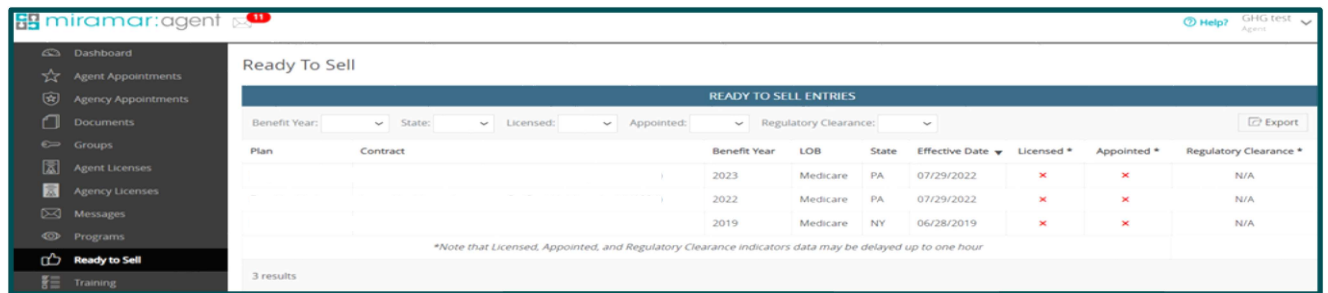


**NOTE:** Not all plans use the RTS functionality in Miramar:Agent. If this is the case for the plan(s) whose program(s) you have completed, this section of the Agent Dashboard will not have any records.



The screenshot shows the Miramar:Agent Agent Dashboard. The left sidebar contains a menu with items: Dashboard, Agent Appointments, Documents, Groups, Agent Licenses, Messages, Programs, **Ready to Sell** (highlighted with a red box), Training, Scorecard, and Knowledge Base. The main content area is titled "Agent Dashboard" and includes a "Register New Program" button. It features three main sections: "ACTIVE PROGRAMS" (showing "There are no programs currently in progress" and a "View All" link), "READY TO SELL" (highlighted with a red box, showing a table with columns: Plan, Contract Name, Contract #, State, Benefit Year, Effective, and In Good Standing; it currently displays "No results" and a "View All" link), "GROUPS" (showing a table with columns: Plan, Group, Start Date, and Writing Code; it lists "Best Health Plan, Inc." as a "Captive" group starting on "05/12/2021" and includes a "View All" link), and "RECENT TRAINING" (showing a table with columns: P, Attempt, Score, Passed, and Completed Date; it currently displays "No results" and a "View All" link).

When viewing the RTS page, you are able to search by Benefit Year or State or sort by Plan, Contract, Benefit Year, LOB, State, or Effective Date by clicking the column headings.



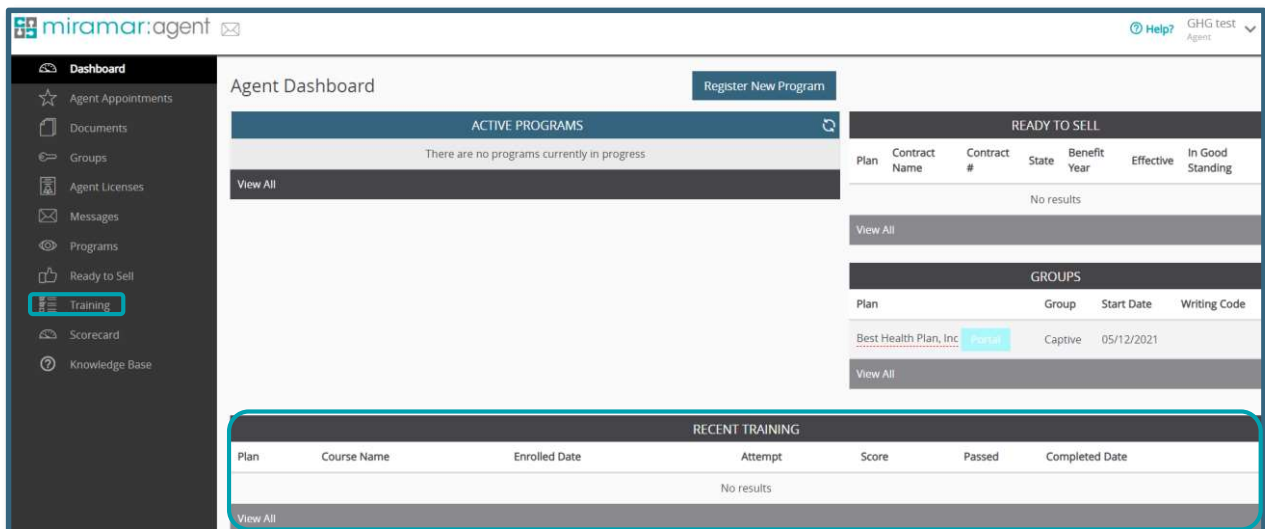
Plan	Contract	Benefit Year	LOB	State	Effective Date	Licensed *	Appointed *	Regulatory Clearance *
		2023	Medicare	PA	07/29/2022	×	×	N/A
		2022	Medicare	PA	07/29/2022	×	×	N/A
		2019	Medicare	NY	06/28/2019	×	×	N/A

\*Note that Licensed, Appointed, and Regulatory Clearance indicators data may be delayed up to one hour

3 results

## TRAINING

To view trainings completed within the last year, view the *Recent Training* widget on the bottom of the Dashboard. To view a full history of your training information, click **View All** from the Training widget or **Training** from the Dashboard menu.



Plan	Contract Name	Contract #	State	Benefit Year	Effective	In Good Standing
No results						

Plan	Course Name	Enrolled Date	Attempt	Score	Passed	Completed Date
No results						

From the Training index, you can search by course name or filter by benefit year or passed status.

miramar:agent

Help? GHG test Agent

Dashboard

Agent Appointments

Documents

Groups

Agent Licenses

Messages

Programs

Ready to Sell

**Training**

Scorecard

Knowledge Base

Agent Training

AGENT TRAINING

Search:

Course name

Plan:

Benefit Year:

Passed:

Export

ID	Plan	Benefit Year	Course ID	Course Name	Enrolled Date	Attempts Used	Score	Completed Date	Passed
21790		2017	498	2017 GHG Core Medicare Training	09/06/2016	0			No
21817		2017	473	TEST Fraud Waste and Abuse Training	09/06/2016	1	100	09/06/2016	Yes

2 results

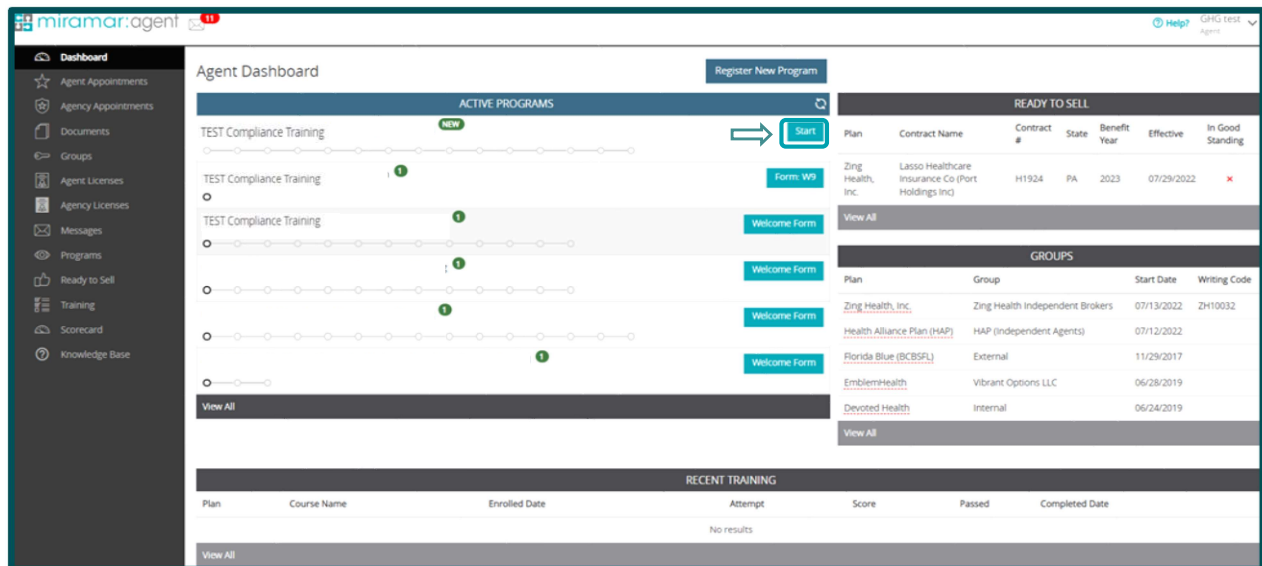
## IV. PROGRAM NAVIGATION

To take action in an active program, go to the Active Programs widget located at the top of the Agent Dashboard.

To the right of the program name, you will see a green button indicating the next action required. If you have not yet started the program, click the green **Start** button to begin the program.



**NOTE:** If there are actions listed but no green button, this means there are no agent-facing steps for you to complete. The program is waiting for outside information such as plan administrator action, document review, appointment confirmation, background check results, etc. Please check back regularly to see if you have any actionable steps until the program is complete.



**Agent Dashboard**

**ACTIVE PROGRAMS**

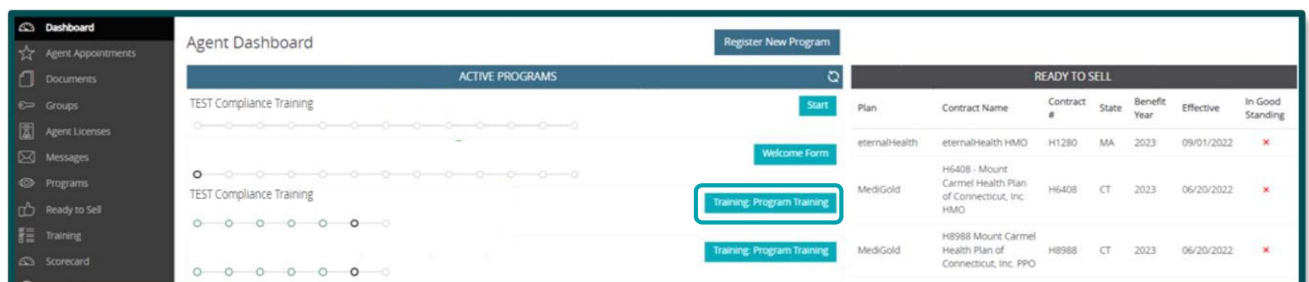
Plan	Contract Name	Contract #	State	Benefit Year	Effective	In Good Standing
Zing Health, Inc.	Lasso Healthcare Insurance Co (Port Holdings Inc)	H1924	PA	2023	07/29/2022	✗

**READY TO SELL**

Plan	Group	Start Date	Writing Code
Zing Health, Inc.	Zing Health Independent Brokers	07/13/2022	ZH10032
Health Alliance Plan (HAP)	HAP (Independent Agents)	07/12/2022	
Florida Blue (BCBSFL)	External	11/29/2017	
EmblemHealth	Vibrant Options LLC	06/28/2019	
Devoted Health	Internal	06/24/2019	

**RECENT TRAINING**

Plan	Course Name	Enrolled Date	Attempt	Score	Passed	Completed Date
No results						



**Agent Dashboard**

**ACTIVE PROGRAMS**

Plan	Contract Name	Contract #	State	Benefit Year	Effective	In Good Standing
eternalHealth	eternalHealth HMO	H1280	MA	2023	09/01/2022	✗
MediGold	H6408 - Mount Carmel Health Plan of Connecticut, Inc. HMO	H6408	CT	2023	06/20/2022	✗
MediGold	H8988 Mount Carmel Health Plan of Connecticut, Inc. PPO	H8988	CT	2023	06/20/2022	✗

**READY TO SELL**

Plan	Group	Start Date	Writing Code
Zing Health, Inc.	Zing Health Independent Brokers	07/13/2022	ZH10032
Health Alliance Plan (HAP)	HAP (Independent Agents)	07/12/2022	
Florida Blue (BCBSFL)	External	11/29/2017	
EmblemHealth	Vibrant Options LLC	06/28/2019	
Devoted Health	Internal	06/24/2019	

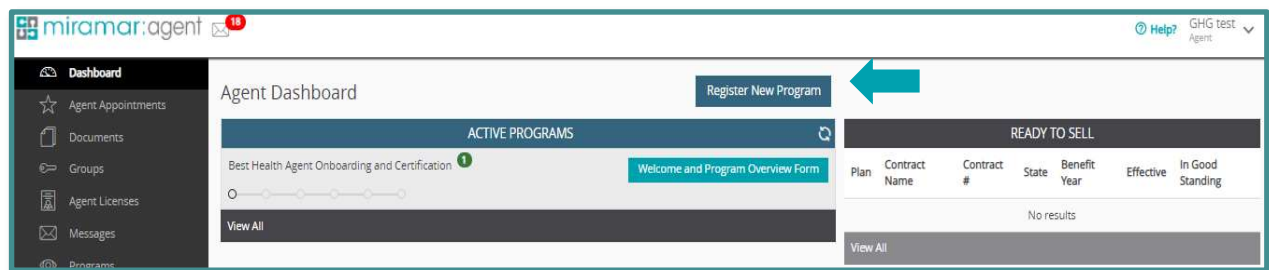
**RECENT TRAINING**

Plan	Course Name	Enrolled Date	Attempt	Score	Passed	Completed Date
No results						

## How do I register for a program using a registration PIN code?

Some organizations may pre-enroll you in programs, in which case you will see the program in your active programs list with a *Start* button.

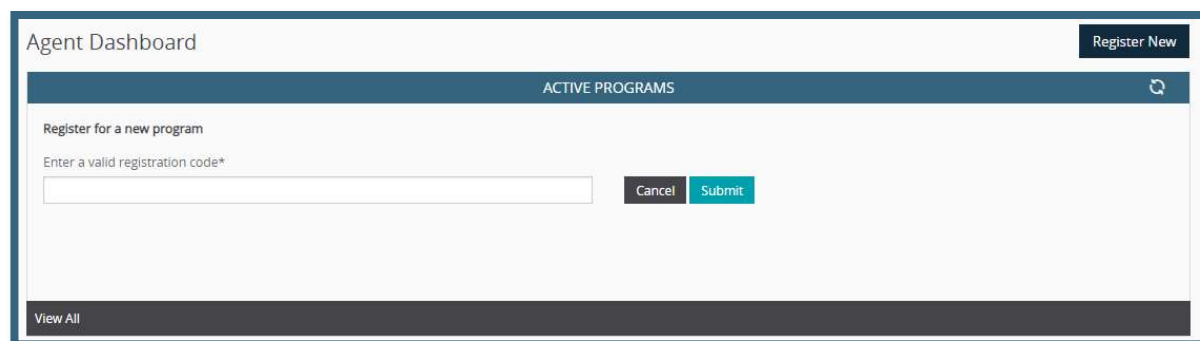
If you were provided a program registration PIN code by your plan or upline, you can register by clicking the **Register New** button at the top of your screen.



Once you click *Register New*, you will be prompted to enter the program registration PIN code provided by your plan or upline. Click **Submit** to complete the registration. PIN codes are not case sensitive.



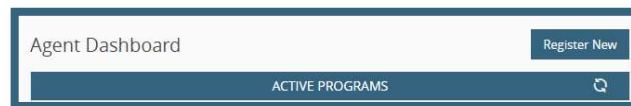
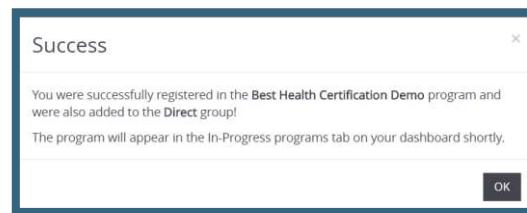
**IMPORTANT NOTE:** If you do not have the registration PIN code for the program you need to complete, please contact your plan or direct upline to obtain one. Miramar:Agent customer support does not provide registration codes.



The screenshot shows the 'Register for a new program' form. At the top right is a 'Register New' button. The form is titled 'Register for a new program' and contains a label 'Enter a valid registration code\*'. Below the label is a text input field. To the right of the input field are 'Cancel' and 'Submit' buttons. At the bottom left of the form is a 'View All' link.

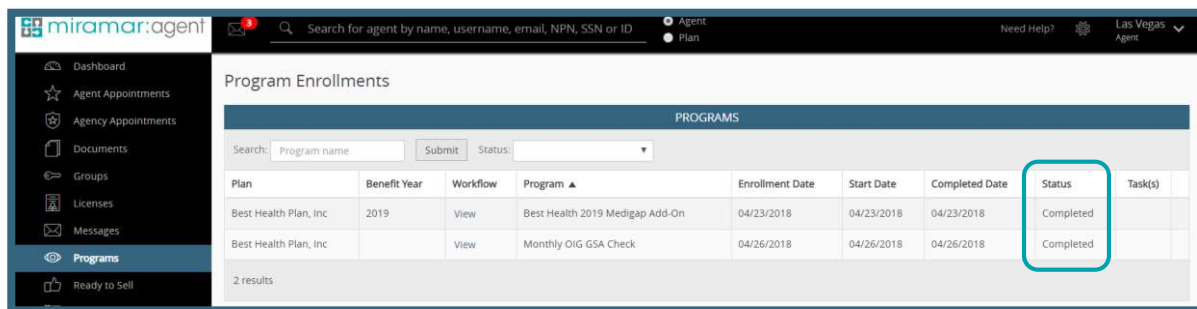


The following screen will pop up to show you have registered successfully. After clicking **OK**, you can click the *refresh icon* in the top right corner of the Active Programs widget to see the new program on your dashboard.



### How do I know if I have completed a program?

You may find that when you log in to your agent dashboard, a program you had previously been working on is now no longer showing on the dashboard. This most likely means you have completed the program. To verify, click **Programs** from your dashboard menu to see the status of your program.



The screenshot shows the "miramar:agent" dashboard. The left sidebar has a "Programs" menu item highlighted. The main content area is titled "Program Enrollments" and contains a table of programs. The "Status" column in the table is circled in red, showing "Completed" for both listed programs.

Plan	Benefit Year	Workflow	Program	Enrollment Date	Start Date	Completed Date	Status	Task(s)
Best Health Plan, Inc.	2019	View	Best Health 2019 Medigap Add-On	04/23/2018	04/23/2018	04/23/2018	Completed	
Best Health Plan, Inc.		View	Monthly OIG GSA Check	04/26/2018	04/26/2018	04/26/2018	Completed	

2 results

## V. Knowledge Base

To access the Miramar:Agent Knowledge Base, go to <https://miramar-agent.com/KnowledgeBase> or click **Need Help? Click here** from the top of any Miramar:Agent page.



Frequently asked questions and helpful training tips for agents can be found on the Knowledge Base homepage. If you need assistance, you can log a ticket by clicking **Submit Ticket** and a representative from our support center will respond within 24 hours.

