# **VIP Agent Support Tutorial**

# **Contact Information**

Our Phone Number &

Website – https://vipagentsupport.com



# The VIP Agent Portal Home Page allows easy access to information without having to log in.

#### MARKET AREAS

Founded and managed by physicians who care about developing better Medicare Advantage programs, along with key management staff, we have long standing experience in organizing, managing and providing medical care services under governmental programs.

Offering Medicare Advantage programs in Florida, North Carolina, South Carolina, and New York.

#### PLANS & PRODUCTS

#### FLORIDA

- Freedom Health, Inc
- Optimum HealthCare Inc.

#### SOUTH CAROLINA

- America's 1st Choice Health Plan, Inc.
- America's 1st Choice of South Carolina, Inc.

#### New York

- Easy Choice Health Plan of New York

# Register Today 🕨

# Quick Links

- Market Areas
- > Plans & Products
- Agent Tools
- Member Resources
- Contact Us

#### AGENT TOOLS

VIP Agent Services is our commitment to providing you the support you need! We are accessible by phone, email, or agent portal communication.

Certify and get access to your commission reports, plan announcements, send on-line inquiries or order supplies on-line and have them shipped direct to you!

## MEMBER RESOURCES

These are just a few of the resources available to our members:

- 6 local walk-in Concierge offices
- Freedom and Optimum Health Care Assistance Program
- Online Resources for printing ID cards, order OTC and diabetic supplies.
- Special Care Programs designed for specific needs
- Member Newsletters

# Home Market Areas Plans & Products Agent Tools Member Reso

# MARKET AREAS



Whether you call a local concierge office or the Agent Services line, we strive to provide the most value in benefit design along with the best customer service for our agents and brokers.

Click on the link to locate a sales office near you......

## FREEDOM HEALTH

# OPTIMUM HEALTHCARE

Hillsborough/Pinellas/Polk Hernando/Pasco Sarasota/Manatee Orange/Osceola/Seminole Marion/Lake/Sumter/Volusia Indian River/St. Lucie/Martin Hillsborough/Pinellas Hernando/Pasco

Inside the Market Areas page you will find a link to each of our markets with additional information.

# America's 1st Choice of South Carolina

"Click Here to View Market Area"

# AMERICA'S 1ST CHOICE HEALTH PLAN

# EASY CHOICE HEALTH PLAN OF NEW YORK

"Click Here to View Market Area"

"Click Here to View Market Area"



Home

Market Areas

Plans & Products

Agent Tools Member Resources

# 2015 PLANS & PRODUCTS

# Freedom Health

https://tools.globalmedicareapps.com/PlanSearch/ PlanSearch.aspx?payer\_id=FRH

# America's 1st Choice Health Plans

https://tools.globalmedicareapps.com/PlanSearch/ PlanSearch.aspx?payer\_id=AFS

# Easy Choice of New York

https://tools.globalmedicareapps.com/PlanSearch/ PlanSearch.aspx?payer\_id=ECN

# **Optimum Health Care**

https://tools.globalmedicareapps.com/PlanSearch/ PlanSearch.aspx?payer\_id=OPT

# America's 1st Choice of South Carolina, Inc.

https://tools.globalmedicareapps.com/PlanSearch/ PlanSearch.aspx?payer\_id=AFS

**Inside our Plans & Products** page you will find a link to the **Corporate website of each Plan** that will take you to the Search **Tool for Plan Products.** 

Home Market Areas

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# Agent Tools

Member Re

# AGENT TOOLS

#### PROVIDER SEARCH

Freedom Health

Optimum HealthCare

America's 1st Choice of South Carolina

America's 1st Choice Health Plans

Easy Choice Health Plans of New York

#### PHARMACY FINDER

Freedom Health

Optimum HealthCare

America's 1st Choice of South Carolina

America's 1st Choice Health Plans

Easy Choice Health Plans of New York

#### AGENT TOOLS

- Agent Service staffed 8am-8pm M-F & 8:30am 5pm during AEP
- Online Inquiries submit and receive commission, member or general inquiries securely
- View & Print Commission Reports Posted every Friday at 5 p.m.

#### DRUG FINDER

Freedom Health

Plans & Products

Optimum HealthCare

America's 1st Choice of South Carolina

America's 1st Choice Health Plans

Easy Choice Health Plans of New York

# TRAINING & CERTIFICATION

If you have questions about online certification, our supplemental trainings for AEP, SEP or failed certification, or need assistance with the VIP portal, please feel free to contact us at 1-877-877-0539. The Agent Tools page contains many helpful links to our corporate websites as well as helpful information that is available to agents in the VIP Agent Portal Home Market Areas

reas Plans & Products

Agent Tools Member Resources

Resources Contact Us

# MEMBER RESOURCES

From your client's first contact during enrollment to getting care when they need it most, we are there every step of the way. We focus on preventive care so our members can focus on the fun things in life! In addition to great benefits, here are some additional member resources



# LOCAL MEMBER CONCIERGE OFFICES

Learn about all our Member resources.

We have 6 Concierge Offices located Statewide for easy access so out Members can tail IV to one of our friendly, helpful and knowledgeable staff members about any issue that concert them and receive World Class Customer Service. That's our promise!

#### **On-Line Resources**

From our corporate website members can print ID cards, order OTC and diabetic supplies.

## Freedom And Optimum Health Care Assistance Program

You may be eligible for EXTRA HELP from State and Federal programs designed to assist you with premiums, copays, coinsurance and more. Many times beneficiaries don't take action qualifying for available help because of cumbersome processes or they simply aren't aware there is assistance available. As a member of our plan, we can submit the applications for you.

## MEMBER NEWSLETTERS

Our quarterly newsletters provide health education and every day tips for living life to the fullest! And of course, a little dose of just plain fun!

## Special Care Programs

Some of our plans offer special care programs designed for specific needs. The Plan's Disease Management Programs provide support for members with chronic conditions such as Diabetes or Heart Disease. The program is voluntary. Members who participate find the program helpful in better managing their condition and plan of care. You can reach Agent Services several different ways. By phone, email or log in and use VIP Answers Online!

\*Please note all Member information must be sent via VIP Answers Online for HIPPA Compliance.

Home Market Areas Plans & Products Agent Tools Member Resources Contact Us

At VIP Agent Support we're committed to providing World Class Service. We have a dedicated Agent Services Team should you have questions about our plans & products, or member concerns & resources..

## CONTACT INFORMATION

Call Agent Services at 1-877-877-0539

8am - 8pm Mon-Fri. or 8.30am - 5pm Sat & Sun during AEP

## EMAIL COMMUNICATION

If you are interested in learning about independent agent opportunities, you can click here to contact us - salesinfo@vipagentsupport.com

If you are currently appointed with us, please use our secure messaging feature on your VIP Agent homepage to send inquiries containing protected health information (PHI).

#### CORPORATE OFFICE

Vip Agent Support 5403 N. Church Avenue Tampa, FL 33614

# **TO REGISTER:**

You will need the 3 digit Agency ID provided to you by your contracted TMO. Click the "Register Today" button.



Enter the 3 digit Agency ID provided by your agency and then click to select the certifications available to your agency.



# All Fields with a Red \* are a required field

Title	Mr	
First Name*		
Last Name*		
Middle Name		You must provide a valid Email address to receive your
Email Address * (Valid email address is required)		user name and password.
Confirm Email Address *		
Social Security Number(xxx-xx-xxxx) * (Invalid SSN will not be appointed) (Required for background check)		Social Security # is required to be appointed
DOI License* (Florida Format) - 1 Alpha 6 digits (ANNNNNN) (Carolina Format) - 9-12 digits(NNNNNNNNNNNN) (Easy Choice) - 6-10 digits(NNNNNNNNNN) (If your ID is 9 digits, please add zeros at the end) (This is your username and writing #. Other licenses held will be requested during testing)		DOI License/User ID: Florida: P123456
Confirm DOI License*		South Carolina. 23450789
License State*	Select 💌	New fork. 123436
DOB (mm/dd/yyyy)*	mr 💌 dc 💌 уууу 💌	
Drivers LIC*		Valid DL in good standards is required to be appointed
Driver License Expiration Date*		
Address1*		
Address2		
City*		
State*	Select 💌	
Zip*		
Home Phone(xxx-xxx-xxxx)		Extn
Work Phone(xxx-xxx-xxxx)*		Extn
Cell(xxx-xxx-xxxx)		Extn
Fax(xxx-xxx-xxxx)		Extn Be sure to validate your DL is in good standings
* $\square$ I acknowledge that the driver's license number I have provided standing.	d is accurate and that my driver's lie	cense is valid and in good
		Select Submit once Complete
Submit	Cancel	· · · · · · · · · · · · · · · · · · ·

# 1-877-877-0539 https://vipagentsupport.com





Once you click submit, you will receive a message stating that your profile was created successfully. If you click on the link you will be directed back to the User Home Page to log-in with the password emailed to the email address provided.



# Agent CHRISTINA STAHL created successfully





Log in using the user ID and password received via email

Welcome : C123456 !! You are Logged in as : Agent

# **Quick Links**

#### Home

## Agency

# Agent

Join Agency

View/Edit Profile

Complete / Print producer agreement

Complete / Update payment options

Complete / Update W9

# Certification

Take Test

Select to allow **Appointment with** State DOI

Change Password Compliance Documents

**Complete the Professional** Profile. For any "Yes" answers in this section, you are required to provide an explanation in the text box provided.

# **Pre-Test Compliance Attestation**

The following Pre-Test Compliance Attestation contains 3 sections. At the end of all 3 sections, you will be asked to attest that you have read, understand and agree to comply with each of the requirements. Your digital signature will be taken.

- 1. Professional Profile & Compliance History Questionnaire
- 2. Sales Representative Commitment to Compliance
- 3. Medicare Managed Care Guidelines CH 3

# **Professional Profile & Compliance History Questionnaire**

# PROFESSIONAL PROFILE

\*  $\square$  I give the Company permission to appoint me for health lines with the State DOI

e answer the following questions. For any "YES" answers, please provide an explanation box to the **RIGHT**.

e you ever been convicted of or pleaded nolo endere (no contest) to: Fraud, embezzlement, ry, false statements, counterfeiting, tion, or any other act involving propriation of funds?

0 Yes No

0



\*I certify the foregoing answers, including explanations, are true and correct to the best of my knowledge and belief.

Submit

C Disagree

DISCLOSURE OF THE USE OF CONSUMER REPORTS: As part of its agreement process and from

Don't forget to select agree. Your name will be inserted for Digital Signature. You will need to add your DOI license number and click Submit. ment and/or contracting, The Company reserves the right to its agents and prospective agents in connection with their is may include personal interviews with sources such as your and/or former employers. Consumer reports and investigatory information about any of the following: your character, general eristics, mode of living, education, past employment, credit als or your driving or criminal record. If we request an equired by Fair Credit Reporting Act to notify you within three ested and if you make a written request, we are obligated to he nature and scope of the investigation requested.

C Agree

authorize the Company to request and

obtain one or more consumer reports and/or investigative consumer reports about me for my employment and/or contracting purposes:

*DIGITAL SIGNATURE	CHRISSY TEST
*DOI License ANNNNN or NNNNNNNN)-Format	C123456
TIME STAMP	8/27/2012 10:06:43 AM

Completing the Commitment to Compliance agreement; read each of the statements and select "I agree" when complete.

# Sales Representative Commitment to Compliance

The Centers for Medicare and Medicaid Services (CMS) and The Plan have a zero tolerance for non-compliance. As a company, we are committed to excellence in the way we conduct our business practices. Our company's continued growth and leadership depend upon the integrity of all the individuals who represent us. Each Medicare Sales Representative who represents our company and products subscribes to this Commitment of Compliance as an expression of their commitment to fair and honest marketing practices. In addition, Brokers/Agents will conduct all coordinated marketing in accordance with all applicable Part D laws, CMS policies, including CMS marketing guidelines and all Federal health care laws (including civil monetary penalty laws). Brokers/Agents understand that they will not engage in any of the following prohibited marketing activities as stated in the Medicare Marketing Guidelines, or any other prohibited marketing activities as published by CMS and summarized below. In this document, "client" means a person who may enroll in a benefit plan and "enrollee" means someone who has enrolled in such a plan. "The Plan" means the health pla I represent.

\* 🗹 I have read and agree to comply with the Sales Representative Commitment to Compliance.



8/20/2014 11:36:00 AM

Submit

PA-Global PA-AFCSC PA-EasyChoice				
America's S Holdings of F	Florida, LLC	You will need to c selecting the tab lines of business y	omplete a producer agreement by at the top that corresponds to the ou will be selling:	
10		Freedom & Optim	num: PA-Global	
		AFC South Carolin	a: PA-AFCSC	
		New York: PA-Easy	yChoice	
2015 PRODUCER AGREEMENT THIS PRODUCER AGREEMENT ("Agreement") is made and entered into as o 2014 ("Effective date") by and between America's 1st Choice Holdings of Florida, LLC, a Florida limited is the second				
(hereinafter collectively referred to as the "Company") and CSTest CSTest, whose address is5403 N Church ave, , Tampa, FL 33614 (hereinafter referred to as "Producer"). For purposes of this Agreement, Company and Producer are sometimes collectively referred to as "parties" and individually as "party."				
* $\blacksquare$ I accept all terms and conditions as outlined in the agreement				
PRODUCER:	You will need to s the producer	sign	PRODUCER:	
*Name: TEST TESTER	agreement, click	*Name:	TEST TESTER	
*DOI License	and click submit	again in the		
Submit	pop-up box.	Date :	8/27/2012 4:35:08 PM	
	L		Submit	

# **Payment Options**

<u>Electronic Funds Transfer (EFT):</u> You must enter all correct account information and agree to the terms and conditions for EFT, then click the submit button to process.

Ļ	
Payment O	ption
Payment Optior	Electronic Fund Transfer form O Mail Paper Check     A
*Account Type:	Checking Savings Other
*Account Number:	* click here to see sample check
*Confirm Account Number:	*
*Routing No:	* click here to see sample check
*Confirm Routing No:	*
*Financial Instituion Name:	*
*City:	*
*State:	Select One 🔻
*Zip Code:	*

Important Notice: It is the applicant's responsibility to ensure that the information provided on this form is complete and accurate. America's Health Management Services will not be responsible and shall be held harmless for errors made in EFT payments that are a result of inaccurate or incomplete information provided on this form. In no event and under no circumstances will America's Health management Services' liability exceeds the amount of the EFT payments in question.



\* ◙ I agree with terms and condition for EFT fund transfer for my commission

Mail Paper Check: You must provide name and address information

# **Payment Option**

Payment Option:	C Electronics Fund Transfer
Attention:	
Company Name:	
Address:	
City:	
State:	-Select State-
Zip Code:	

Submit

• Mail Paper Check

Form Rev. Au Department Internal Re	Korm W-9 Request for Taxpayer Rev. Avaust 2013 ) Department of the Treasury Internal Revenue Service			Give Form to the requester. Do not send to the IRS.
ci l	*Name (as Business r	s shown on your income tax return)  * name disregarded entity name, if different from above	/e	
Print or type See Specific Instructions on page 2	*Check appropriate box for federal tax: individual/Sole proprietor C Corporation S Corporation Partnership Trust/estate Limited liability company Enter the tax classification (C=C corporation, S=S corporation, P=partnership) Other(see instructions)		Exemptions (see instuctions) Exempt payee code (if any) Exemption from FATCA reporting code (if any)	
	*Address *City:	(number, street, and apt. or suite no.)  *  State: FL  *ZIP 33614  at number(s) here (optional)	Requester's name (optional)	e and address
		Part I	Taxpayer Id Number (TI	entification N)
Enter match withh (SSN) disree	your TIN ir h the name olding. For ). However, garded enti	the appropriate box. The TIN provided must given on the "Name" line to avoid backup individuals, this is your social security number for a resident alien, sole proprietor, or ty, see the Part I instructions on page 3. For other	*Social security	number ] tification number

You must complete an updated W9 form, all fields with a Red \* must be completed to continue.

# Certification

You have 60 minutes to complete individual tests before system times out Testing Attempts 2 failures in same day =lock out to study for 24 hours 3rd failure=one to one coaching 4th failure=may not market for season You a

STEP 1: Select certification year from the list below Certification Year 2015 
Defaults to 2015 STEP 2: Select a company from the list below Company Optimum 
STEP 3: Enter DOI License\* STEP 1: Select certification year from the list below Company Optimum 
STEP 3:

(ANNNNNN or NNNNNNNN)-Format

Confirm DOI License\*

# STEP 4:

I have taken AHIP and received Certification for the General Medicare Test and only need to take Plan Specific Training & Tests.

I would like to take Plan Specific Tests for the Certification Year & company selected above

Submit

You can opt out of the Medicare General with an AHIP Certificate.

You are ready to go to the training &

Click Submit once you are ready for testing

# **Uploading an AHIP Certificate**



Certification You have 60 minutes to complete individual tests before system times out Testing Attempts 2 failures in same day =lock out to study for 24 hours 3rd failure=one to one coaching 4th failure=may not market for season STEP 1: Select certification year tore to 2015 Certification Year 2015 Defaults to 2015	Select the company you want to certify for first. The order of the testing will first include the Medicare General (unless you have an Approved AHIP) and then the Plan Specific for the company you selected. Then enter DOI License and click Submit.
STEP 2: Select a company from the list below	
Company Optimum 🔹	Click OK, when prompted if you want to
STEP 3:	go with the selected option?
Enter DOI License* (ANNNNN or NNNNNNN)-Format	
Confirm DOI License*	
STEP 4:	
I have taken AHIP and received Certification for the General Medicare Specific Training & Tests. The page at get	e Test and only need to take Plan
I would like to take Plan Specific Tests for the Certificat	au want to go with the selected untion?



Submit

# **Medicare General Testing**

# Medicare General Test Training Information – Please review the attachments



 $\Box$  I have reviewed all the training Materials.

Ready to Take Test

Click on Every link to download or view the training material.

When you are done reviewing the training material, select that you have reviewed and click "Ready to Take Test".

# Medicare General Testing, cont.

General Certification Test

Section 1

Agents/Brokers must be tested annually on Medicare rules and regulations and plan specific products. T or F?

**O** TRUE

C FALSE

When enrolling a prospective member on a Medicare Advantage plan, a beneficiary might also have health and/or prescription drug coverage from a former or current employer or union that could affect their choices. T or F?

**O** TRUE

C FALSE

According to CMS Guidelines, a plan sponsor's Agent appointment guidelines should be in accordance with which regulatory body?

C The State's appointment laws.

<sup>C</sup> the Federal gov't's appointment laws.

O The Plan's appointment policy.

# Certification

You have 60 minutes to complete individual tests before system times out <u>Testing Attempts</u> 2 failures in same day =lock out to study for 24 hours 3rd failure=one to one coaching

4th failure=may not market for season

Questions are multiple choice or True & False. There are 30 Medicare General questions and 55 Plan specific. You must pass with 85% on each.

You will not be able to take a Plan specific test without either passing the Medicare General or providing a valid AHIP Certificate.

# **Plan Specific Testing**



# Freedom Health Plan Training Information – Please review the attachments

Please review each Link before taking test:

Freedom Plan Specific Training

Medicare Marketing Guidelines

When you have reviewed the training material and are ready to begin the test, please Click below to Take Test.

You will be presented with testing based on your previous selections. You must pass with 85% on each test. You are allowed 2 attempts in 24 hours. You are allowed a 3rd attempt the next 24 hour period. If you have not successfully passed after 3 attempts, you will be contacted for alternative retraining and be allowed 1 final attempt.

I acknowledge I have received and I will comply with the Compliance Policies and Procedures, the Compliance Plan, Plan's Standards of Conduct and the MMG issued by CMS.

 $\square$  I acknowledge I have read the Plan Specific Training material.  $\checkmark$ 

Ready to Take Test

When you have completed the Medicare General, then Click "Take Test" again, and you will be presented the Plan Specific Training Material for the company you selected (Sample: Freedom Health). Continue this process if you are taking multiple company testing.

> Training Materials, acknowledgement and click Ready to Take Test

# Agent Home Page

# 1-877-877-0539 https://vipagentsupport.com



Home Market Areas Plans & Products Agent Tools

Velcome : 0987654 !! You are Logged in as : Agent

#### Quick Links

#### Home

#### Agent

Join Agency

View/Edit Profile

Complete / Print producer agreement

Complete / Update payment options

Complete / Update W9

#### Certification

Take Test

#### VIP Answers Online

Create a Message View Received Messages View Sent Messages

#### Announcements

View Announcements

FAQ

View FAQ

#### Marketing Materials

Order Materials Here Online Enrollment Application View Document

#### Administration

Change Password Compliance Documents

#### Reports

Agent Statement

# Welcome CSTest CSTest !

2015 Certification is now available !

#### Agent ID is: Q987654

2015-General Test Certification #: 201446240/Score 100.00 %

2015-Freedom Test Certification #: 201446242/Score 100.00 %

2015-Optimum Test Certification #: 201446314/Score 100.00 %

# Clearance To Market

Company Name	Year Of Clearance	Market Clearance Date	In
Freedom	2015	08/19/2014	8/19

## Agent News

AnnouncementId	Title	Date	Com
144	tufailannouncement	8/19/2014 6:14:53 PM	EasyC
42	tufailannouncement	8/19/2014 6:14:53 PM	AFC S
140	tufailannouncement	8/19/2014 6:14:53 PM	Optim
39	tufailannouncement	8/19/2014 6:14:53 PM	Freedo
31	newAnnouncement	8/5/2014 9:59:30 AM	EasyC

#### Your Contracted Agency is:

Name: Test Chrissy

Your homepage will have your certification confirmation number, test scores, Clearance to Market, Announcements and contracted agency contact info.

You do not need to send anything to your agency. They have access to your scores and confirmation information. You can now use the support services on the left such as internal inquiries with plan support staff, view/order materials, online enrollment application, etc.

# Welcome!

# Agent Services 1-877-877-0539 Monday - Friday 8:00am - 8:00pm Saturday & Sunday 8:30am - 5:00pm during AEP