

JOB AID

Enrollment HUB

Quick Start



This job aid provides you an overview of the Enrollment HUB application. You will be introduced to the application, its benefits, and main screens. You will also find basic information on what you can do in the application: navigate the Main Menu and Workbench, create Appointments and Enrollments, and finally learn how to work in Off-line Mode. The more you know about the application, the faster and more efficient you become.

Table of Content

01/ [Introducing Enrollment HUB](#)

02/ [Enrollment HUB Main Screens and Functionalities](#)

Getting to Know Enrollment HUB

Introducing Enrollment HUB

Enrollment HUB is a new electronic enrollment system that allows you to create and manage appointments and enrollment applications.

You will be able to create appointments and enrollment applications with or without an Internet connection. When working Offline, you must download at least one state or plan information for up to three states from the Settings tab listed under the Main Menu (also called Hamburger Menu) where you have a license to sell.



Image 1 - Enrollment HUB's Log in Page View

MOST COMMON APPLICATIONS

Enrollment HUB will allow you to complete the following applications:

- Individual Medicare
- Scope of Appointment
- Member Authorization Form (MAF)
- Humana Pharmacy Authorization Form
- PHI (Protected Health Information) Form
- Optional Supplemental Benefits Enrollment
- Free-Standing Supplemental Benefits Enrollment (Connected mode only/Link Out)
- Medicare Supplement - with Eligibility and Quote (Connected mode only/Link Out)

In the future you are also going to be able to perform the following applications directly from within the tool

- IDV (Individual Dental & Vision)
- Group Medicare
- OSB Add-on application



NOTE: Applicants can Enroll in an OSB Plan only if they Enroll at the same time into their base plan.

MAIN SCREENS

As soon as you login to Enrollment HUB you will identify two main sections: Main Menu and Workbench

The **Main Menu** (also called Hamburger Menu) will allow you to navigate through the application to perform a variety of actions which include, creating scope of appointment, creating an enrollment application, accessing important links you need for your work, downloading the information you need to work in off-line mode, and checking your transactions among others.

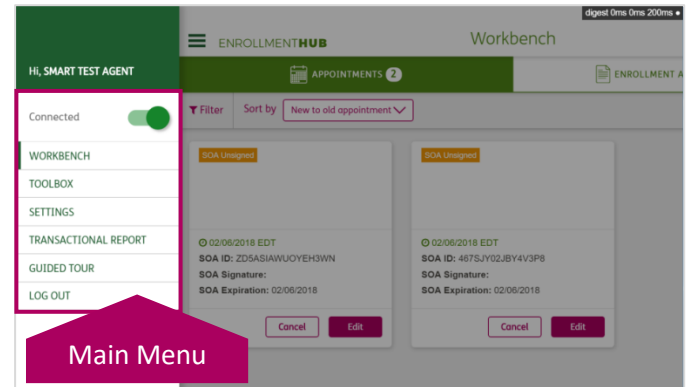


Image 2 – Main Menu Screen View

The **Workbench** screen will allow you to create and manage scope of appointments and enrollment applications

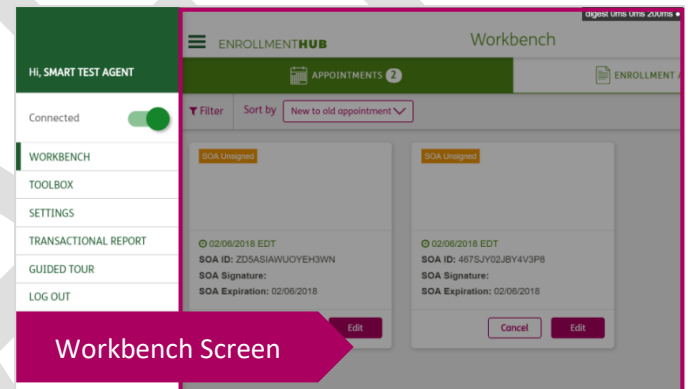


Image 3 – Workbench Screen View

Enrollment HUB Main Screens and Functionalities

MAIN MENU

Also called Hamburger Menu, displays the main features of Enrollment HUB. It includes the following components:

- Disconnected/ Connected toggle
- Workbench
- Toolbox
- Settings
- Transactional Reports
- Guided Tour
- Logout

The Main Menu allows you to access important information and drive sales while easily navigating the application.

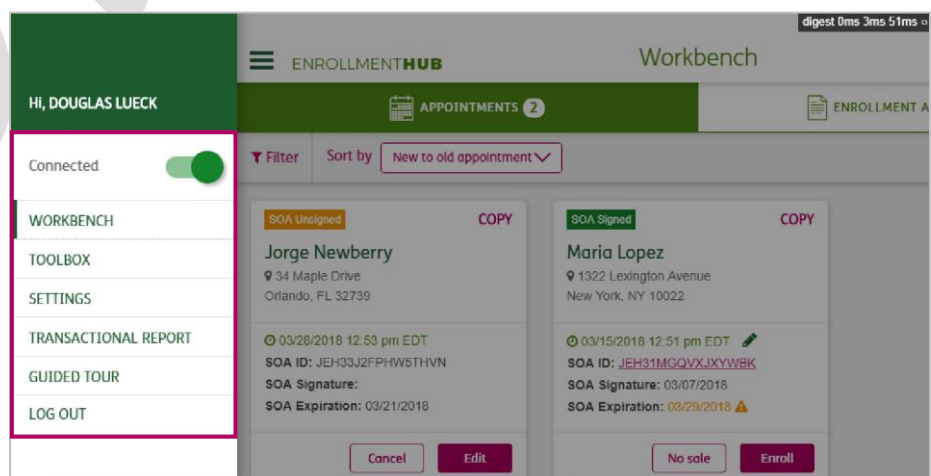


Image 4 – Main Menu View

WORKBENCH

The Workbench is the starting point to create and manage your appointments and enrollments. You can filter your appointments and enrollment cards into categories for more efficient use of the cards within the Workbench.

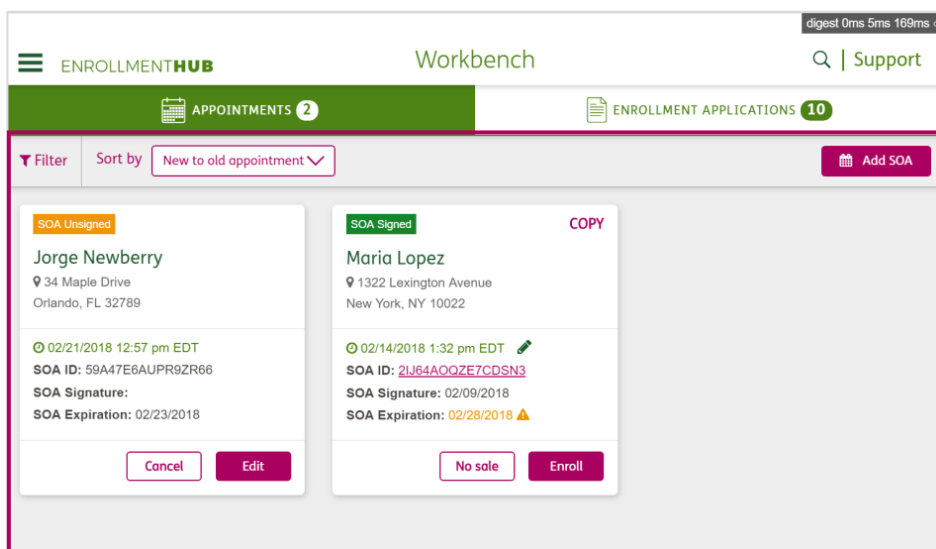


Image 5 - Workbench Screen View

APPOINTMENTS

Once in the Workbench, you can create a new appointment and manage existing ones. In the Scope of Appointment (SOA) section, you will be able to add the applicant's information, determine what plan(s) you will discuss, set a time for the appointment, and capture their signature.

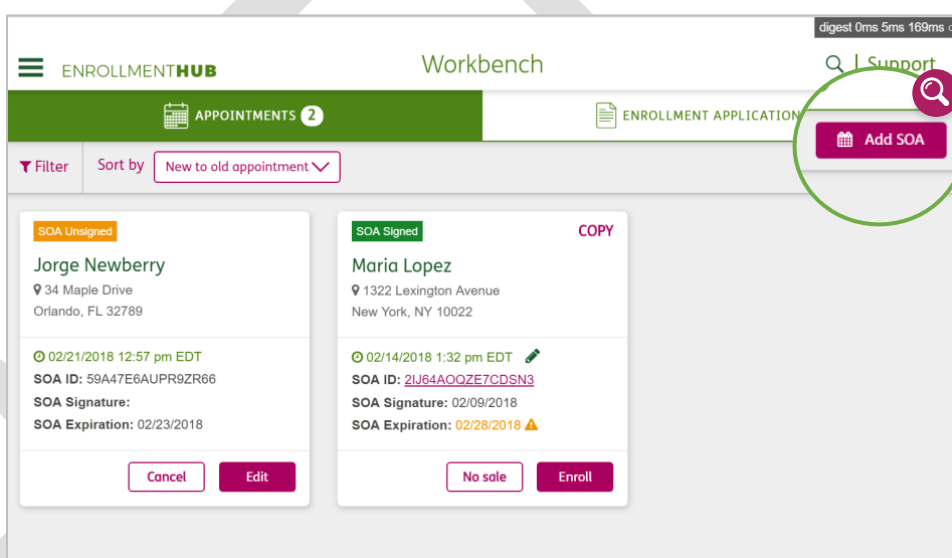


Image 6 - Workbench: Appointments View

ENROLLMENT APPLICATIONS

In the Workbench you can also create and manage enrollment applications for new and existing members. You will be able to select an appropriate plan based on the zip code provided, enter necessary information, and capture the agent's signature.

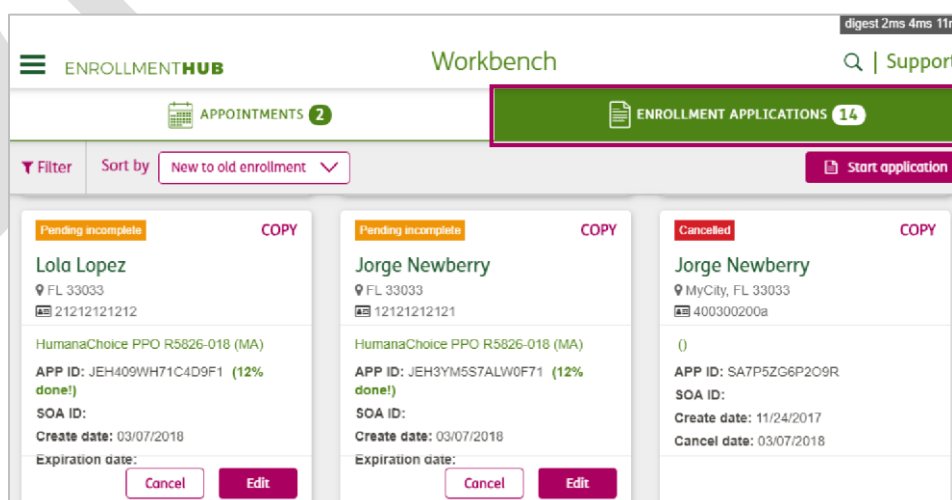


Image 7 - Workbench: Enrollment Applications View

OFF-LINE MODE

Enrollment HUB provides you with the ability to work Off-line if necessary. As a Humana agent, you are appointed to sell products in states where you are licensed. In order for the appropriate plans to be available in Off-line Mode, you must download those states into Enrollment HUB while you have an Internet connection.

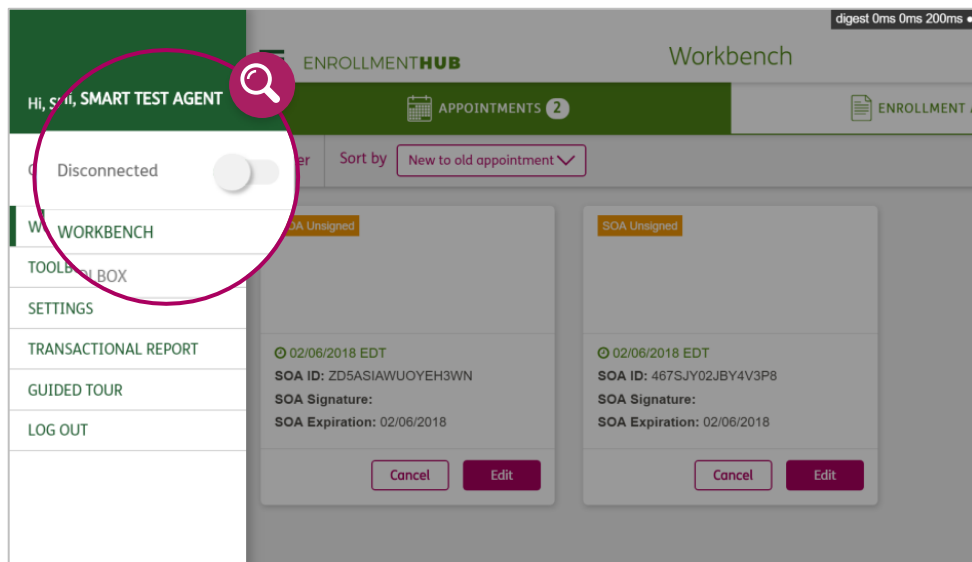


Image 8 - Connect / Disconnect Toggle Switch



NOTE: You need to download at least one and up to three states where you have a license to sell Humana products.

SYNCHRONIZATION PROCESS

The synchronization of Enrollment HUB happens while being in Connected Mode. Therefore, it is highly recommended to start and end the day using the application in Connected Mode.

Enrollments created in Off-line mode will have a "Pending Ready For Upload" status until you connect to the Internet. Once you are Connected, enrollments will automatically synchronize with Humana.



Keep in mind that the enrollments that you create in Off-line mode could be rejected by the Humana administration in case the applicant's plan does not match with the enrollment.

This document is part of Enrollment HUB Training Curriculum

- How to start using Enrollment HUB: What do you need?
- **Enrollment HUB Quick Start ←**
- How to Login and Logout
- Understanding the Main Menu
- Use the Off-line Mode
- Workbench: Searching, Filtering and Sorting Cards
- Create a Scope of Appointment (SOA)
- How to Manage a SOA
- Create an Enrollment: MAPD (New Member)
- Create an Enrollment: PDP (New Member)
- Create an Enrollment: Chronic Disease (New Member)
- How to Manage an Enrollment
- Identifying Messages in the Application
- Identifying the No Sales Reasons
- What You Cannot Forget When Using the Enrollment HUB