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<td>16</td>
<td>Password Recovery</td>
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</table>
Registration

Go to YourHealthAlliance.org and choose Create an Account from under the Log In box.

Choose the Broker tab in the lefthand menu, and then use the Request Broker Access button to register as a broker.

*Note:* If you’re an agency assistant, you will follow this same registration process.
Follow the on-screen directions to set your contact information and password.

**Note:** You must register with the email address you've previously shared with Health Alliance.

Once you hit the Create Account button on this page, you'll be sent to the Confirm Email page.
This page will outline the confirmation email process. Use the Confirm button in the email you receive (in the second image below) to finish your registration.

Click Confirm in the Confirmation email sent to you.
Follow the on-screen directions to complete your profile with information like your NPN, and submit it to us for approval.

You'll get an email when you’ve been approved, and then you’ll be able to log in.
Prospective Broker Contracting

On the Registration site, complete the form below and click Create Account when finished.

### Health Alliance Prospective Broker Registration

1. **Create Account**
2. **Confirm Email**
3. **Complete Profile**

Set up an account with your email address, which will be your login name/ID, and a secure password.

**Name**

- **First Name:**
- **Last Name:**

**Email Address**

- This will be your Health Alliance login.
- This is where we'll send you notifications electronically.
- You'll have to confirm this email address to finish registering.
- This email can only be linked to one user account.

- **Email:**
- **Re-enter Email:**

**Set Password**

- Must be at least 8 characters long.
- Must have at least one upper-case, one lower-case, and one number or special character.
- Can't be your name, email, or contain any version of your name, Health Alliance.

- **Password:**
- **Re-enter Password:**

- I have read the [Health Alliance Privacy Policy](#) and agree to the terms and conditions.

- I'm not a robot

[Create Account Button]
This page will outline the confirmation email process. Click the Confirm button in the email you receive (in the second image below) to finish your registration.

Click Confirm in the Confirmation email sent to you.
Follow the on-screen directions to complete your profile and click Submit.

You’ll get an email from us once we have approved your profile, at which point you’ll be able to login.
Click edit in the “Getting Started with Health Alliance” row to begin inputting your information.

Note: You will need to review each section before submitting.
If you are an independent agent click the “contract directly with Health Alliance” checkbox. If you are a part of an agency, click “…appointed under an existing agency” and add agency information below.

### Getting started with Health Alliance

Complete each section below with your contracting documents. Don’t forget to save when you’re done.

**Broker Information**
- **Date of Birth**: mm/dd/yyyy
- **Home Mailing Address**
  - (Street, City, State, Zip Code)
  - **City**: __________
  - **Zip Code**: __________
- **Phone**
  - (Home, Cell)
  - **Home**: (123)123-1234
  - **Cell**: (123)123-1234
- **Secondary Languages Spoken**: 

**What products would you like to sell and where?**

<table>
<thead>
<tr>
<th>Product</th>
<th>Illinois</th>
<th>Iowa</th>
<th>Washington</th>
<th>Indiana</th>
<th>Ohio</th>
</tr>
</thead>
<tbody>
<tr>
<td>Medicare Advantage</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Individual Plans for those under 65</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Medicare Supplement</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Group plans (includes small group, large group, and group Medicare Advantage)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**How would you like to contract with us?**
- I would like to contract directly with Health Alliance
- I would like to be appointed under an existing agency

*Note: Your agency is where commissions will be paid, so if you’re contracting with an upline, that information should be entered here.*

**Agency Information**
- **Agency Name**: 
- **Agency Phone**
  - (Office, Fax)
  - **Office**: (123)123-1234
  - **Fax**: (123)123-1234
- **Agency Mailing Address**
  - (Street, City, State, Zip Code)
  - **City**: __________
  - **Zip Code**: __________
- **Date started at Agency**: mm/dd/yyyy
Under Agency Information you will see a box for “Date Started at Agency”, you should put today's date in this box.

<table>
<thead>
<tr>
<th>Agency Information</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Agency Name</td>
<td>Agency Name</td>
</tr>
<tr>
<td>Agency Phone</td>
<td>Office (123)123-1234 Fax (123)123-1234</td>
</tr>
<tr>
<td>Agency Mailing Address</td>
<td>Street City (select) Zip Code</td>
</tr>
<tr>
<td>Date started at Agency</td>
<td>Jan/20/xxxx</td>
</tr>
</tbody>
</table>


When you click “Edit” in the license document row, you will be brought to the below page. Do not click Save until you have uploaded your producer’s license for every state you plan to sell in.

To do this, click on a row of a state you wish to sell in.

This box will appear, here you can add information about your producer license for the applicable state.

Note: If you are a part of an agency you will need to fill out the additional three fields
Enter all applicable information and click Save.

<table>
<thead>
<tr>
<th>Errors &amp; Omissions Statement</th>
<th>Choose File</th>
<th>No file chosen</th>
</tr>
</thead>
<tbody>
<tr>
<td>Errors &amp; Omissions Contract</td>
<td>mm/dd/yyyy</td>
<td></td>
</tr>
<tr>
<td>Effective Date</td>
<td>mm/dd/yyyy</td>
<td></td>
</tr>
<tr>
<td>Expiration Date</td>
<td>mm/dd/yyyy</td>
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<tr>
<td>Carrier</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Policy Number</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Coverage Amount</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Coverage Amount must be at least $1,000,000
Complete the following forms and click Save when you’re done.

If you answered Yes to any of these and have questions or concerns please email habrokercontracting@healthalliance.org
After completing all four sections you can return to any section to make changes before clicking submit. Once you are ready to submit, complete the Attestation and Electronic Signature by entering your full legal name and click Submit.
Navigation

Log in by going directly to YourHealthAlliance.org or by going to HealthAlliance.org and choosing Login from the very top, right menu.

Once you've logged in, you'll be on your Book of Business. You'll also see some or all of these tabs in the top menu:

- **Agency Dashboard** tab is available to all Principal Agents or delegates. The Agency Dashboard will not show if you are not listed as the Principal Agent or the Principal Agent has not granted you access.

- **Individual** tab will only show if you have individual members and/or individual Medicare members.

- **Group** tab will show any group business you have.

- **Medicare Contracting** tab lets you upload your Medicare Advantage contracting documents instead of emailing them.

- **Events & Seminars** tab lets you submit Medicare Advantage events and seminars to us for review and approval. You must be fully contracted for Medicare Advantage to be approved to host events or seminars.

- **Forms & Resources** tab lets you download, print and order sales and marketing materials.

*Note:* If you're on a smaller screen, like your phone or tablet, or your browser window is reduced, you may not see tabs. In that case, you can still access these from the dropdown menu.
Reviewing Your Agency Book of Business

The **Agency Dashboard** is available to all Principal Agents or delegates. The Agency Dashboard will not show if you are not listed as the Principal Agent. (Learn more about giving an assistant or agency employee who isn’t an agent access in the [Assistant Dashboard] section.)

The Agency Dashboard gives you a quick overview of the current business within your agency. You can narrow down your membership info by broker or search for members by their last name or member number.
Reviewing Your Agent Book of Business

The Individual tab will only show if you have individual members and/or individual Medicare members. Choosing it will show you a snapshot of your current, pending and recently termed business.

- **Future Effective:** Received application for a future effective date.
- **Awaiting Initial Payment:** Received application and need payment before the policy can become active.
- **Active:** Member is currently active and in good payment standing.
- **Terming Soon:** Member has notified us about a future termination date or has not paid their premium and may soon be terminated.
- ** Terminated:** Member is not currently active. You'll be able to view them for 90 days after their termination date.
- **Canceled:** Member was termed never effective.

Choose any of these status options in blue to see a list of just those members. These statuses are directly correlated to the status of the member in our system.

Use the search below the charts to look for members by their name, member number, date of birth, plan type or subscriber status. Your search results will show any member who meets the criteria you enter.
On the Individual tab, when you choose a subscriber from the list below the charts or from a search, you can open their current and past plan details. From here, you can:

- Connect to up to their last three plans’ specific provider directories, plan benefits, drug lists, preauthorization lists and plan documents.
- Request a new ID card be mailed to the member or print a temporary ID card for their current plan.

If a member is terminated for any reason, you will only be able to see them for 90 days past their termination date. If there’s an Agent of Record change, you’ll no longer see the member as of that change’s effective date.
The **Group** tab will show any group business you have. The statuses here are directly correlated to the status of the group in our system.

- **Future Effective Date**: Group is implemented with a future effective date.
- **Awaiting Client Decision**: Action is required by group.
- **Implementing**: Received required paperwork, and group setup is in progress.
- **Active**: Group setup's completed, and coverage is currently active.
- **Terming Soon**: Received notice about a future termination date or has not paid their premium and may soon be terminated.
- **Termed**: Group is not active. You'll be able to view them for 90 days after their termination date.

Use the search at the bottom of the page to look for groups by their name, number, type or status.

Below the search, you'll see a list of all of your groups. From here, you can choose a group or view the group's full roster. If you view the full roster, you can search for members within that group and select them to see their plan details.

If a member or group is terminated for any reason, you will only be able to see them for 90 days past their termination date. If there's an Agent of Record change, you'll no longer see the group as of that change's effective date.
You can also do member maintenance directly from Your Health Alliance for brokers. When you go into a group member's plan details, you can use the Actions section to update their information.

If the group submits their enrollment information through an 834 file, you won't see this section on Your Health Alliance for brokers or employer groups.
Member & Group Invoices

From the **Individual** tab, choose View Invoices from below a subscriber's name to pull up their invoices.
From the **Group** tab, choose View Invoices from below a group’s name to pull up its invoices.

If you choose a group from here and go to its details, you can also choose View Invoices.
Once you’ve chosen View Invoices, you’ll see a document history of statements. Choose View beside a statement to look at the full document.
Member & Group Balances

You can also see member and group balances from the Individual and Group tabs.

From the Individual tab, you can see the balance below the subscriber’s details. A balance in blue is a current balance, and a balance in red is a past due amount. If a member has a credit, you’ll see a note that there’s a credit on their account.

*Note:* Transactions made within the last 2 business days may not be reflected in this balance yet.
From the Group tab, you'll be able to see a group's balance below their details and the View Invoices link. A balance in blue is a current balance, and a balance in red is a past due amount.

**Note:** Transactions made within the last 2 business days may not be reflected in this balance yet.
Assistant Dashboard

The Principal Agent can give an assistant or agency employee who isn’t an agent access to the Assistant Dashboard. Email a completed Assistant Permissions Page to BrokerServices@healthalliance.org to add this access.

The Assistant Dashboard gives you a quick overview of the current business within your agency. You can search for members or groups or filter by broker by choosing their number under the product you’d like to see.
Quick Links

Along the side of many of these pages, you'll see some or all of these useful quick links.

**Commission Statements**
Review monthly statements of your received commissions for Health Alliance members.

**Renewal Report**
See which of your members are renewing and their plan choices on this custom report.

**Stay In Touch**
Stay up-to-date with important announcements and flashes so you're always in the loop with important news to sell our plans.

**Training**
Please click here to complete your Health Alliance Agent certification.

**Quoting & Enrollment**
Manage your small group and individual clients, proposals, quotes, renewals, and enrollments.

**Medicare Quoting & Enrollment**
Guide your clients through Medicare plan options and quotes and manage enrollments.

**Partner Portal**
Access your broker profile and licenses, contacts and leads, employer group accounts, member details, and applications.
Brokers will have access to employer group reporting for groups of 25 or more subscribers. The subscriber count will be calculated at the time of the sale and then the renewal. All Brokers will have employer group reporting automatically for their groups based on subscriber qualification. Principal Agents will have access to all of their groups and all of the agencies groups reporting. Assistants with Principal permission will also have access to all of the agency's group(s) reporting.

The reports will post quarterly (the month after the quarter ends based on the group's renewal date) on the 20th of the month. Brokers will receive an email confirming the availability of the reports. Your Employer Groups will also get this notice and have access to this same reporting.

Before the reports are loaded, you will not see any changes. Once you receive the first notice that you have reports and log in to yourhealthalliance.org for brokers, you will see the following icon (on the right hand side of the screen):

![Reports icon]

This is one way you can view reports. Another option you have to view reports specific to a group is to click on the group tab and locate the group you would like to view the reports for. You will see a view reports link on the group details page.
Brokers with large groups that meet the 25 or more subscribers enrolled level will have access to the Large Group Reporting package. This package includes the following reports:

- **Income Statement** - Basic income statement that provides a snapshot of group's financial performance. Based on incurred claims through specified times.

- **Cost Use Comparison** - Shows utilization and PMPM stats by Category/Subcategory for current year as well as previous years up to a 2-year history. Helpful to see Year-over-Year (YoY) or changes from previous period/year to current period/year.

- **PMPM Comparison** - Shows utilization and PMPM stats by Category/Subcategory for current year as well as previous years up to a 2-year history. Helpful to see Year-over-Year (YoY) or changes from previous period/year to current period/year.

- **Cost Use by Year** - Shows gross utilization, gross cost data (after IBNR applied), and calculated PMPM's by Category/Subcategory to compare group's financial performance against PMPM benchmarks derived from previous year's claims data.

- **Catastrophic Claim Report** – Shows all claimants who have total claims dollars exceeding a certain threshold. Default threshold is dependent on group size. This report does not have a lag factor applied. Also includes visual that depicts the total percentage of claims costs that are from CAT Claimants vs. non-CAT Claimants.

- **Member Cost by Claim Level** - Shows % and total number of members with claims in a given cost level, comparison to HAMP Book of Business Benchmark for membership info, Shows % and total costs for a given cost level, comparison to HAMP Book of Business Benchmark for cost info, and no lag (IBNR) is applied to this report.


- **Diagnosis By Category** - Provides breakdown of percentage of costs by diagnosis category. Also, breaks out costs by Category (Inpatient, Outpatient, Ancillary, Physician), Pharmacy not included, Shows groups’ percentage of cost for a given diagnosis category to compare actual percentages to benchmark percentages and no lag (IBNR) is applied to this report.

- **Top 10 Vendors** - Shows top 10 vendors in descending order of total costs i.e. Overall vs. Out of Network vs. In Network.

**Definitions/Reference** –

- Retention means admin fees for the Large Group reporting. Examples included in retention are Broker commission fees, ACA tax; Admin costs (flat PMPM that changes annually).

- Pooled Claims – total dollars in excess of the pooling level, the pooling level is a variable threshold that is determined by the size of the group.

- Catastrophic Claims Thresholds – vary based on size of group, examples 180 members’ $50,000 threshold.

Please contact brokerservices@healthalliance.org with any questions
Accessing Commission Statements

If you’re the Principal Agent, you’ll be able to access commission information. If you’re the Principal Agent, we’ll also let you designate an agency contact who can access commission information on your behalf. Email a completed Assistant Permissions Page to BrokerServices@healthalliance.org to add this access.

Choose the Commission Statements box from the quick links on the side of many pages.

The Producer Dashboard will show your most recent available statement beneath the welcome message. When you choose View Statement, another window will pop up with the statement, and you can use your browser to save or print it.
To access all statements, going back to January 1, 2015 commissions, choose History from the menu on the left, and then choose Statements. This brings up a row for each month a statement is available.

To view a PDF of a statement, choose Statement from the column on the far right.

To download statement information into an Excel format, choose the row of the month you want, (do not check the check-box) to bring up a PDF version, which has a Statement Extract option in the menu on the left.
In Statement Extract, you’ll see a partial report. Choose the Save button in the top right corner.

A pop-up will open for you to choose a format to save in. Choose XLS for Excel, and then you can choose to open or save the file.
Completing Medicare Advantage Contracting

The **Medicare Contracting** tab lets you upload your Medicare Advantage contracting documents instead of emailing them.

First, choose Edit next to the License Documents section to upload your producer and agency licenses.
For each state you want to sell in, upload a PDF of your active producer’s license, and enter the effective date and expiration date. You can also enter your agency license information if you need to.

Don't forget to hit the Save button when you're done.
Now, you’ll choose Edit next to the Contracting Documents section.

On this page, you’ll check the boxes for each state you want to sell in. (If you didn’t enter license information for a state, you won’t be able to select it. You can return to the License Document page to add more license information if you need to.)

Then, upload a PDF of your Errors & Omissions Contract and enter its details, and upload a PDF of your AHIP certificate for the current plan year and enter in the completion date listed on your certificate.

Don’t forget to hit the Save button when you’re done.
Next, you’ll choose Edit next to the Broker Agreement section.

Fill out any missing personal information.

Review and answer the history and legal questions. If you answer yes to any of the questions, you’re required to give us details in the text box. You’ll get an error reminding you to add details if you try to save the page without adding them.
Once you've reviewed our Marketing Standards of Conduct, type in your full, legal name to attest that you've completed all information and answered all questions to the best of your knowledge.

Don't forget to hit the Save button when you're done.

All three sections should now show they've been completed with a green check mark.

Scroll down to review the legal section, type in your full, legal name, and then choose Submit. (You will not be able to submit until all sections are complete.)

You'll be sent to a confirmation of your Medicare Advantage contract submission. Online training information or the DocuSign e-contract (if your product training has already been completed) will be sent to you within 7 business days.
Submitting Events & Seminars

The **Submit Medicare Advantage Events & Seminars** tab lets you submit Medicare Advantage events and seminars to us for review and approval. **You must be fully contracted for Medicare Advantage to be approved to host events or seminars.**

Your name and email will be filled automatically based on your account information. Select all of the products that will be represented at the event.

Choose the event type, presentation language and if you’d like us to advertise the event. **Note:** We will not advertise informal or educational events. This field will only populate if you choose Formal for the event type.

To enter multiple events with the same venue information, but different dates or times, choose the Add Additional Time button. Enter in the additional event date, time and presenting agent’s name.

You can add as many additional times as necessary with this button.
Enter the details for the venue, including the name, phone number, capacity, address, and the type of facility. Use the Additional Information section to enter landmarks or major intersections that could be helpful for those attending the event.

Enter any additional information you feel would be helpful for our staff or those attending the event in the Comments section.

Choose the Submit for Review button, and you'll be emailed a confirmation. We'll review the event within 5 business days, and then you'll be sent another email approving or denying your submission.
To review or check on the status of your previously submitted events, choose Submitted Events & Seminars in the upper right hand corner of the page.

From here, you can search for previously submitted events or copy a previously submitted event that only needs details like a date changed. Choose the Copy button next to the event you want to copy, update the details for that event, like date and time, and submit for review.

You'll be emailed a confirmation. We'll review the event within 5 business days, and then you'll be sent another email approving or denying your submission.
Forms & Resources

The **Forms & Resources** tab lets you download, print and order sales and marketing materials.

Choose the plus sign beside each section to expand it and view a list of those materials. You can also search for specific items using the Quick Filter box. Enter a keyword, and then scroll down to see all the materials with that keyword in the name. (Make sure you use the Clear button when you’re done with your search to view all materials again.)

Choose materials to view or download, or you can order any materials with an Add to Order button beside them. Everything you choose the Add to Order button for will be added to the Order Form at the bottom of the page.
When you're done choosing materials, scroll down to the Review and Submit Order form at the bottom of the page to update quantities and enter or confirm your delivery information.

By default, it chooses Ship to Office to send to your permanent address. But if you don't have a permanent address on-file, it will show the agency address. You can also choose the Ship to Agency dropdown to have materials sent there, or the Ship to Custom Address dropdown to enter a different address. **Note:** We cannot deliver to PO Boxes.

Don't forget to hit the Submit Order button when you're finished. Allow 7 business days for delivery. (If you need materials sooner, contact your client consultant.)
Contact Us

If you have questions, need help or need to send us information, email us at the appropriate email address listed on the Contact page, which you can find in the very top, right menu.

Contact Us

Enrollment
- IndividualEnrollment@healthalliance.org – Use to submit applications, plan changes, and terminations for all private individual product members. Public enrollments and termination requests must go through HealthCare.gov.
- Membership@healthalliance.org – Use to submit applications, plan changes, and terminations for all employer group members.
- MedicareEnrollment@healthalliance.org – Use to submit applications, plan changes, and terminations for all Medicare members.

Sales
- Quotes@healthalliance.org – Use to submit small group prospects.
- SmallGroup@healthalliance.org – Use for small group questions and requests for prospects and renewals.
- SalesAdmin@healthalliance.org – Use to submit large group sales.
- ClientSupport@healthalliance.org – Use to submit small and large group questions and requests on prospects and renewals.

Customer Service
- CustomerService@healthalliance.org – Members can use to ask questions about their plans, such as benefits, claims, and policy information questions.
- MemberServices@healthalliance.org – Use for pre-sale Medicare Advantage questions and post-sale Medicare Advantage member questions.

Broker Services
- BrokersServices@healthalliance.org – Use for commercial and individual contracting questions.

Medicare
- HABrokerContracting@healthalliance.org – Use for Medicare Advantage contracting questions.
- MedicareAR@healthalliance.org – Use for Medicare Advantage Agent of Record change requests.
- mmis@healthalliance.org – Use for Medicare Advantage scope of appointment submissions to keep them on file for the CMS guideline.
Account Settings

Visit the Account page, in the very top, right menu, if you need to update any of your account details. In the Settings tab, you can update information like your name, email or password. You can also add additional access roles to your account from this page.

From the Office Management tab, you can update your office’s details.
Password Recovery

You might see a banner when you log in that reminds you to set up password recovery text messages. You can choose the banner or Account from the very top, right menu to set these up.

Choose Setup beside Recovery Phone Number to get started.

This will take you to the Update Recovery Phone page, where you’ll enter your password and phone number details, and then choose Send Verification Code.
A pop-up will open saying a text with a verification code has been sent to the number you've entered. You should receive a text within a few minutes with this code, which will be good for 10 minutes after you requested it. If you never get the text or it expires, you can choose Try Again to get a text with a new code.

Once you've received the text, enter the code into the pop-up and confirm to finish setting up your recovery phone number.

**Note:** You can return to the Account Settings and follow this same process to update your recovery phone number at any time.

Once you've set up your recovery phone number, you can use it to reset your password the next time you forget it. If this happens, go to YourHealthAlliance.org and choose Forgot Your Password? from the Log In box.
From this page, you can enter your email address or recovery phone number to get sent info to reset your password.

If you used your recovery phone number, you should receive a text within a few minutes with a verification code, which will be good for 10 minutes after you requested it. If you never get the text or it expires, you can choose Try Again to get a text with a new code.

Once you’ve received the text, enter the code into the pop-up and continue to reset your password.
This will take you to the Reset Your Password page, where you can choose a new password.