



Icario Agent Portal

Agent Training

TRAINING TOPICS

Step-by-Step Instructions For Agents and Brokers



OVERVIEW

Learn about Agent Portal
and supported devices



SIGNING IN

Easy-to-follow instructions
to sign into Agent Portal



COMPLETING HEALTH RISK ASSESSMENTS

How to start a new HRA, enter enrollee's
information, and complete an HRA



Icario Agent Portal

OVERVIEW: Agent Portal

Agent Portal is a user-friendly tool within the Icario platform designed for efficiency. Now Agents and Brokers can quickly capture assessments as part of a seamless sign-up process for *new* plan enrollees.

OVERVIEW: TECHNICAL REQUIREMENTS

Supported Browsers

Preferred Browsers for Best Performance:

- ✓ Google Chrome
- ✓ Firefox
- ✓ Edge

Other Browsers (these will work but we recommend the above):

- ✓ Safari



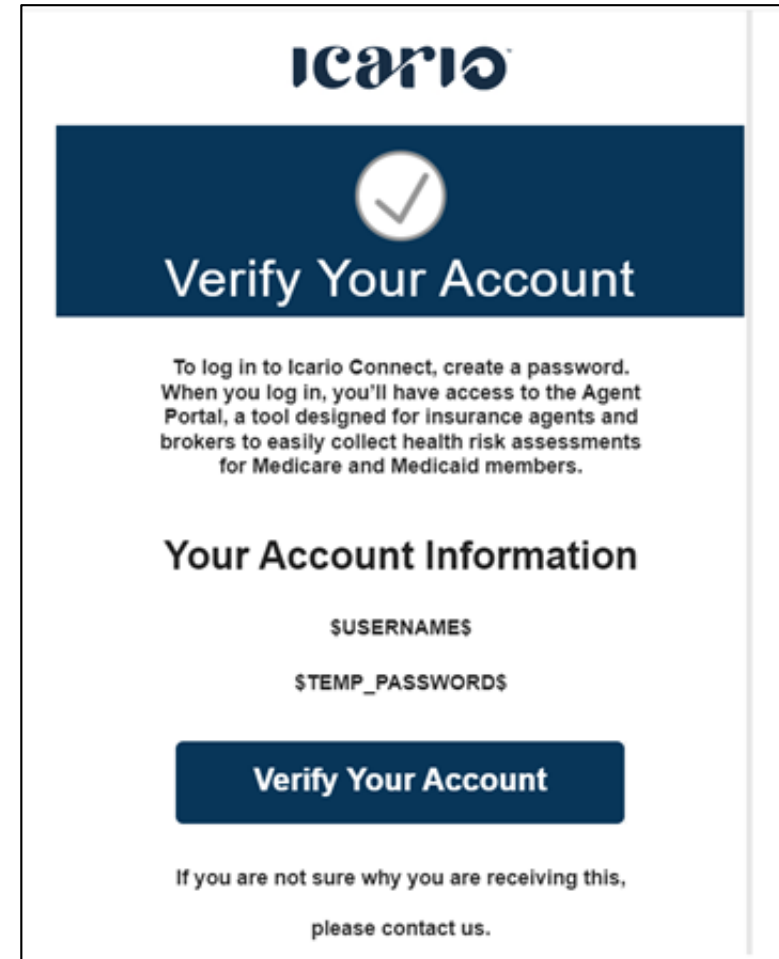


Creating an Account

CREATING AN ACCOUNT: EMAIL INVITATION

Email Invitation:

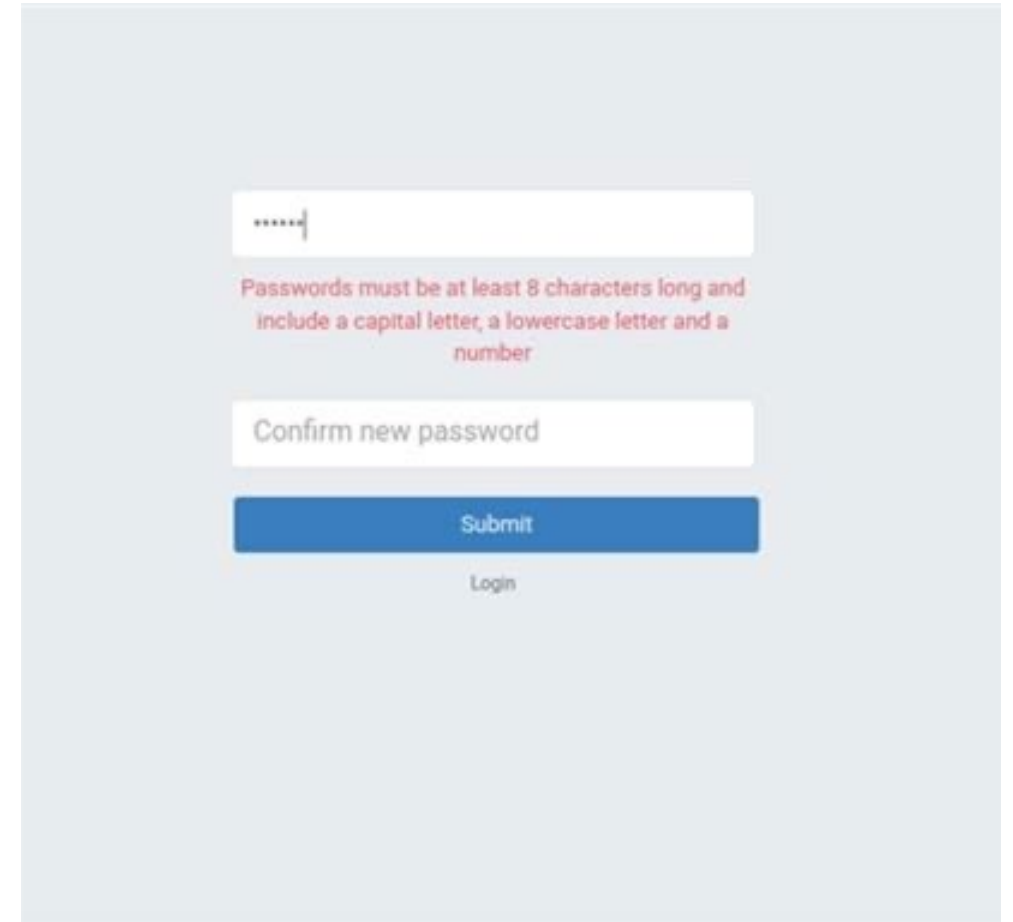
- You must verify your Agent Portal account
 - Details on how to do this are sent via a Welcome Email
 - You will receive a temporary password and be prompted to create a new password upon login



CREATING AN ACCOUNT: SETTING A PASSWORD

Creating a Password:

- Your password must:
 - Be at least 8 characters in length
 - Contain at least 3 of the following types of characters:
 - Lower case letters (a-z)
 - Upper case letters (A-Z)
 - Numbers (i.e. 0-9)



The screenshot shows a web form for creating a password. It features two input fields: the first is for the new password and the second is for confirming it. A red error message is displayed between the fields, stating: "Passwords must be at least 8 characters long and include a capital letter, a lowercase letter and a number". Below the second field is a blue "Submit" button and a "Login" link.



Agent Portal Demo



Signing into Agent Portal

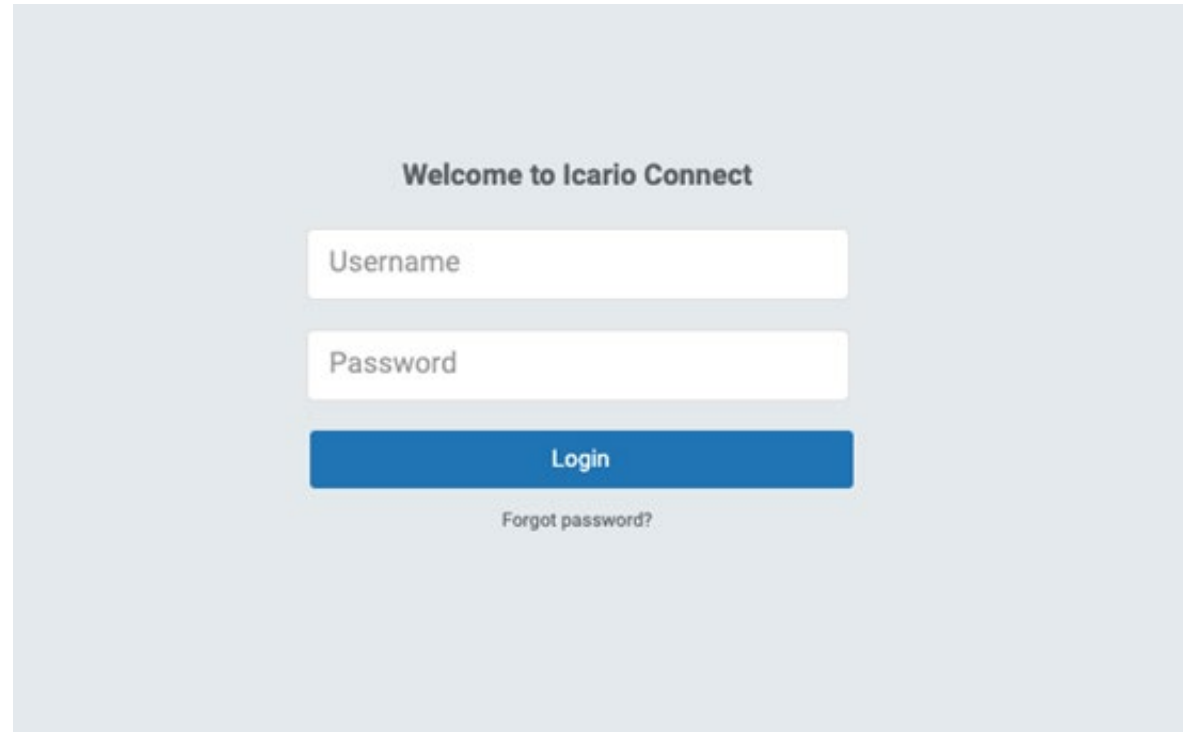
SIGNING IN: ICARIO CONNECT

Login Page:

- <https://admin.icario.health/login>

Username:

- Enter your email address.



The screenshot shows a login page for Icario Connect. At the top, it says "Welcome to Icario Connect". Below this, there are two input fields: "Username" and "Password". The "Username" field is a white box with a light gray border. The "Password" field is a white box with a light gray border and a small eye icon on the right side. Below the password field is a blue button with the text "Login". At the bottom of the form, there is a link that says "Forgot password?".

SIGNING IN: ICARIO CONNECT

Password:

- Enter the new password you just created
- Click the 'Login' button
- If you need to reset your password, click on "Forgot Password?" and you'll be emailed instructions on how to reset it

Welcome to Icario Connect

agent2@icariohealth.com

.....|

Login

[Forgot password?](#)

SIGNING IN: ICARIO CONNECT

Success! You've signed in.

- You are immediately brought to the homepage
- Note: the Molina logo/image is only included here for example purposes, i.e., agents who represent multiple organizations are required to select the company they are currently working with/or whose HRA they want to access, by clicking on the appropriate company logo on the login screen. In order to access Cigna's HRA, select the Cigna logo.





Starting & Completing an Assessment

HEALTH ASSESSMENT: ADD PROSPECTIVE MEMBER

Menu

- Navigate to the menu on the left-hand side
- You can expand the menu by clicking on the arrow

The screenshot displays the Icario Health Assessment interface. On the left, a dark blue sidebar menu is expanded, showing options: 'Select Organization', 'Survey status', 'Members' (with a downward arrow), and 'Close menu'. The 'Members' menu is highlighted. The main content area is titled 'Member search' and includes a 'Clear all filters' link. Below the title are two buttons: 'Create prospective member' and 'Apply'. The search form contains several input fields: 'Status (0)' (a dropdown menu), 'Profile ID', 'Instrument', 'Username', 'First name', and 'Last name'. Below the search fields is an 'Advanced search' toggle and the text 'Current filters: none'. At the bottom, a table header is visible with columns: ID, Status, First name, Last name, DOB, Identifier number, Inst. type, and Email.

HEALTH ASSESSMENT: ADD PROSPECTIVE MEMBER

1) Select Members in the Navigation Bar



The screenshot displays the 'icario' Member search interface. On the left, a dark blue navigation bar contains the following items: 'Select Organization' (with a calendar icon), 'Survey status' (with a headset icon), 'Members' (with a person icon and highlighted by a red box), and 'Close menu' (with a left arrow icon). The main content area is titled 'Member search' and includes a 'Clear all filters' link in the top right. Below the title, there are six search filter boxes: 'Status (0)' (a dropdown menu), 'Profile ID', 'Instrument', 'Username', 'First name', and 'Last name'. To the right of these filters are two blue buttons: 'Create prospective member' and 'Apply'. At the bottom left of the main area, there is a link for 'Advanced search' and a status indicator 'Current filters: none'.

HEALTH ASSESSMENT: ADD PROSPECTIVE MEMBER

2) Click on Create prospective member in the Navigation Bar

The screenshot displays the 'icario' Member search interface. On the left, a dark blue navigation bar contains the following items: 'Select Organization' (with a grid icon), 'Survey status' (with a headset icon), 'Members' (with a person icon and an upward arrow), and 'Close menu' (with a left arrow). The main content area is titled 'Member search' and features a 'Clear all filters' link in the top right. Below this, there is a row of search filters: 'Status (0)' (a dropdown menu), 'Profile ID', 'Instrument', 'Username', 'First name', and 'Last name'. A blue button labeled 'Create prospective member' is highlighted with a red rectangular box, and a smaller blue button labeled 'Apply' is positioned to its right. At the bottom left of the main area, there is an 'Advanced search' link with an upward arrow and the text 'Current filters: none'.

HEALTH ASSESSMENT: ADD PROSPECTIVE MEMBER

3) Fill in the member information

The following fields are required

- First name
- Last name
- Gender
- DOB
- State
- Identifier type
- Identifier number

The screenshot shows a web form for adding a prospective member. The form is titled "Prospective member for Cigna:Cigna:Medicare:Multi-State" and features the Cigna logo at the top left. A "Change Organization" link is visible in the top right. The form contains several required fields: "First name" and "Last name" (text inputs), "Middle initial" (text input), "Gender" (dropdown menu), "DOB" (date input with a calendar icon), "State" (dropdown menu), "Identifier type" (dropdown menu), and "Identifier number" (text input). A blue "+" button is located next to the "Identifier number" field. At the bottom, there are three buttons: "CANCEL", "SAVE", and "GO TO MEMBER". A red error message "Please enter all required fields." is displayed at the bottom left of the form area. The background shows a list of member names and their corresponding information, including "KELLY", "1954-03-16", "9FQ4FY0MY05", and "MBI".

HEALTH ASSESSMENT: ADD PROSPECTIVE MEMBER

Identifier type is a drop-down field.

MBI should always be selected as the identifier

Change Organization

Cigna

Prospective member for Cigna:Cigna:Medicare:Multi-State

First name * (Required) Last name * (Required)

Middle initial Gender * (Required)

DOB * (Required)

State * (Required)

Identifier type * Identifier number * +

MBI

Please enter all required fields. CANCEL SAVE GO TO MEMBER

HEALTH ASSESSMENT: ADD PROSPECTIVE MEMBER

Identifier number will restrict the MBI format per CMS.

Note: Letters will need to be uppercase.

The screenshot shows a web form for adding a prospective member. The form is titled "Prospective member for Cigna:Cigna:Medicare:Multi-State" and features the Cigna logo. It includes several required fields: First name, Last name, Middle initial, Gender, DOB (with a calendar icon), State, Identifier type, and Identifier number. The Identifier number field is highlighted with a red border. At the bottom, there are buttons for "CANCEL", "SAVE", and "GO TO MEMBER", along with a red error message: "Please enter all required fields." The background shows a list of members with columns for Last name, Gender, Middle initial, Test, Location, Role, Pet, Wid, DOB, GRE, Mail, NAM, and GOS.

Last name	Gender	Middle initial	Test	Location	Role	Pet	Wid	DOB	GRE	Mail	NAM	GOS
KELLY	1954-03-16	9FQ4FY0MY05	MBI									

HEALTH ASSESSMENT: ADD PROSPECTIVE MEMBER

Identifier number will restrict the MBI format per CMS.

Note: Letters will need to be uppercase.

Change Organization

Cigna

Prospective member for Cigna:Cigna:Medicare:Multi-State

First name * (Required) Last name * (Required)

Middle initial Gender * (Required)

DOB * (Required)

State * (Required)

Identifier type * Identifier number * (Highlighted with red box)

8TT4-T88-TT88

Please enter all required fields. CANCEL SAVE GO TO MEMBER

HEALTH ASSESSMENT: ADD PROSPECTIVE MEMBER

When all required fields are completed, click on GO TO MEMBER on right.

This will save the prospective member record.

The screenshot shows a web form for adding a prospective member. At the top right is a link for "Change Organization". The Cigna logo is on the left, and the page title is "Prospective member for Cigna:Cigna:Medicare:Multi-State". The form contains several required fields: "First name" and "Last name" (text boxes), "Middle initial" (text box), "Gender" (dropdown menu), "DOB" (date picker with "yyyy-mm-dd" placeholder and a calendar icon), "State" (dropdown menu), "Identifier type" (dropdown menu), and "Identifier number" (text box with "8TT4-T88-TT88" entered). A blue "+" button is next to the identifier number field. At the bottom, there are three buttons: "CANCEL", "SAVE", and "GO TO MEMBER". The "GO TO MEMBER" button is highlighted with a red rectangular border. A red error message "Please enter all required fields." is visible at the bottom left of the form area.

HEALTH ASSESSMENT: ADD PROSPECTIVE MEMBER

After Clicking Go To Member, you will be brought to the member profile.

Click on the down arrow to the right of CIGNA MEMBER HRA.

Click on Take Survey.

The screenshot shows the 'Member Details: Gerald Tester' page. It includes a 'Ways to Earn' section with an 'Effective Dt' field and a 'Show Hidden Promotions' checkbox. Below this is a table of programs. The first row is highlighted and contains the following data:

Program	Max Reward	Program Status
10750-1509850-CIGNA-Multi-State-Medicare-Agent-Portal-2022		ACTIVE

Below the table, there is a section for 'CIGNA MEMBER HRA' with a star icon and an information icon. A red box highlights a dropdown arrow to the right of this section.

This is a close-up of the 'Cigna Member HRA' section. It features a star icon, the text 'Cigna Member HRA', and an information icon. A red box highlights a blue button labeled 'Take Survey' in the bottom right corner.

HEALTH ASSESSMENT: NAVIGATING THE ASSESSMENT



Capturing Responses to the Assessment:

- A new window will open displaying the survey
- A singular question will appear on each screen
- After answering a question, click next to be brought to the next question
- You may go back and change an answer at any time before completing the assessment.

Cigna wants to support you in every way they can throughout your health journey, and the HRA is an important tool for making sure you're getting the care and support you need. Your responses to the HRA questions may be used to develop an individualized care plan, which includes recommendations to help you live your best life. You're not required to give out any health-related information, and you have the right to decline the survey. Your participation doesn't affect your enrollment in a Cigna plan, your access to care or your health plan benefits. And your responses won't affect your premium or any other costs of the plan you enroll in.

Note to Agent: Please ensure to enter the customer's demographic information accurately, i.e., MBI exactly as indicated on their Medicare card.

Do you provide your permission for me to facilitate Cigna's Health Risk Assessment?

HEALTH ASSESSMENT SURVEY QUESTIONS



Cigna wants to support you in every way they can throughout your health journey, and the HRA is an important tool for making sure you're getting the care and support you need. Your responses to the HRA questions may be used to develop an individualized care plan, which includes recommendations to help you live your best life. You're not required to give out any health-related information, and you have the right to decline the survey. Your participation doesn't affect your enrollment in a Cigna plan, your access to care or your health plan benefits. And your responses won't affect your premium or any other costs of the plan you enroll in.

Note to Agent: Please ensure to enter the customer's demographic information accurately, i.e., MBI exactly as indicated on their Medicare card.

Do you provide your permission for me to facilitate Cigna's Health Risk Assessment?

This question is required.

Member providing consent for Agent to complete survey is a requirement to proceed

HEALTH ASSESSMENT: Agent Attestation



Agent attestation:

Agent discussed all questions included in this survey with the customer, and the customer chose:

to answer all questions

not to answer questions that were left blank



Back

Next



Agents are required to attest to questions discussed in survey for submission to be completed

HEALTH ASSESSMENT: NAVIGATING THE ASSESSMENT

When you've completed all questions, you will be prompted to submit the survey.

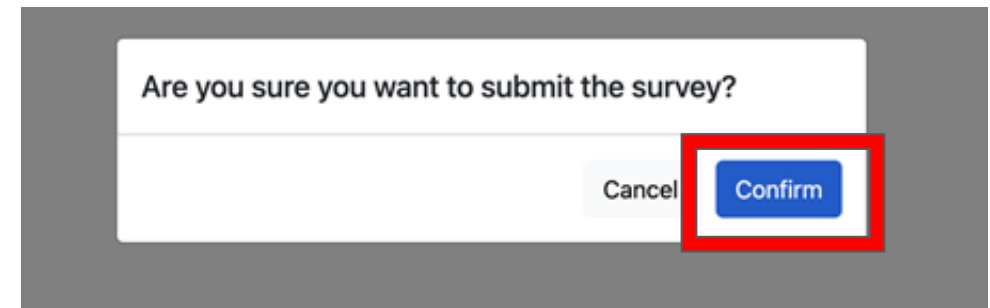
Click on Submit button and you will be prompted to Confirm the submission.

!!NOTE: You must fully submit the survey for it to be counted as complete.



You have completed all the questions!

Click "submit" to complete the survey



HEALTH ASSESSMENT: NAVIGATING THE ASSESSMENT

After submitting the survey, you will receive a confirmation message that the survey has been submitted.

Success!

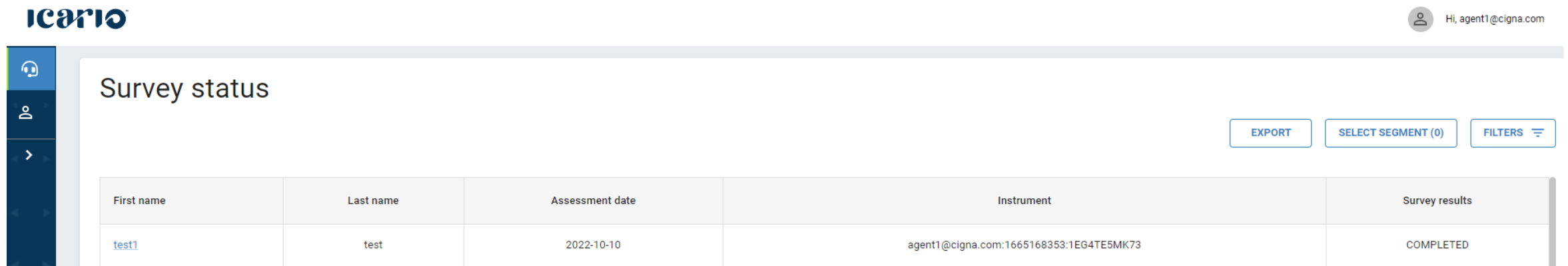
Exit Scripting: Thank you for taking time to talk with me today. If your phone number or address ever changes, be sure to call Cigna and let them know. That way they can connect you to all the services and programs that are available to you. Cigna really wants to help in any way they can, so please don't hesitate to give them a call. You can contact Cigna Customer Service using the toll-free number on the back of your ID card you will receive, which is 800-668-3813 (TTY 711), from 8 AM to 8 PM Monday – Friday, extended hours 10/1 – 3/31, 7 days a week 8 AM to 8 PM customer's local time. Thank you for being a new valued Cigna customer.

Close

Submit

AGENT DASHBOARD

You can view your completed surveys by navigating to the Live Agent Dashboard in the navigation menu.



The screenshot displays the icario Agent Dashboard interface. At the top left is the icario logo. At the top right, there is a user profile icon and the text "Hi, agent1@cigna.com". A dark blue navigation sidebar on the left contains a home icon, a "Do" label, and a right-pointing arrow. The main content area is titled "Survey status" and features three buttons: "EXPORT", "SELECT SEGMENT (0)", and "FILTERS" with a dropdown arrow. Below these buttons is a table with the following data:

First name	Last name	Assessment date	Instrument	Survey results
test1	test	2022-10-10	agent1@cigna.com:1665168353:1EG4TE5MK73	COMPLETED

Thank You