MP Insurance Solutions
Solving your insurance questions

Manual on the Basics of

Created by Emily Davis and Theresa Struckmeyer

I. Color Coding and ID Status

Activity Color Code

[Green]	Appointment Closed
[Black]	Meeting, Training, Calls, To Do's, Vacation, Personal Activities
[Red]	Appointment
[Blue]	Covered California Appointment Closed or Won
[Purple]	Issues (Maverick Database Only)

ID Status

Prospect – Leads/clients who may be interested

Member – Active clients (Considered a Member when an application has been completed)

Inactive – Inactive clients (Considered Inactive when the member Disenrolled/Denied/Cancelled)

Provider - Doctors

Wrong Number

Not Interested

Disconnected

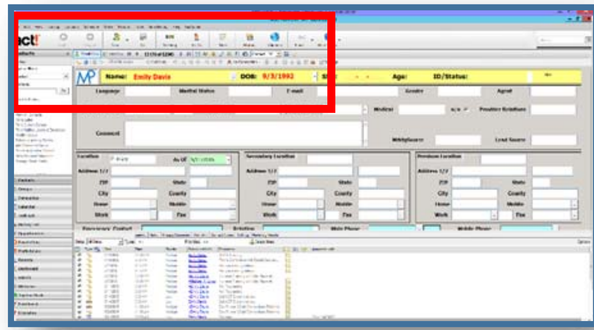
Dialysis

Deceased

Not Eligible

If any of these are chosen, the client will be removed from your database

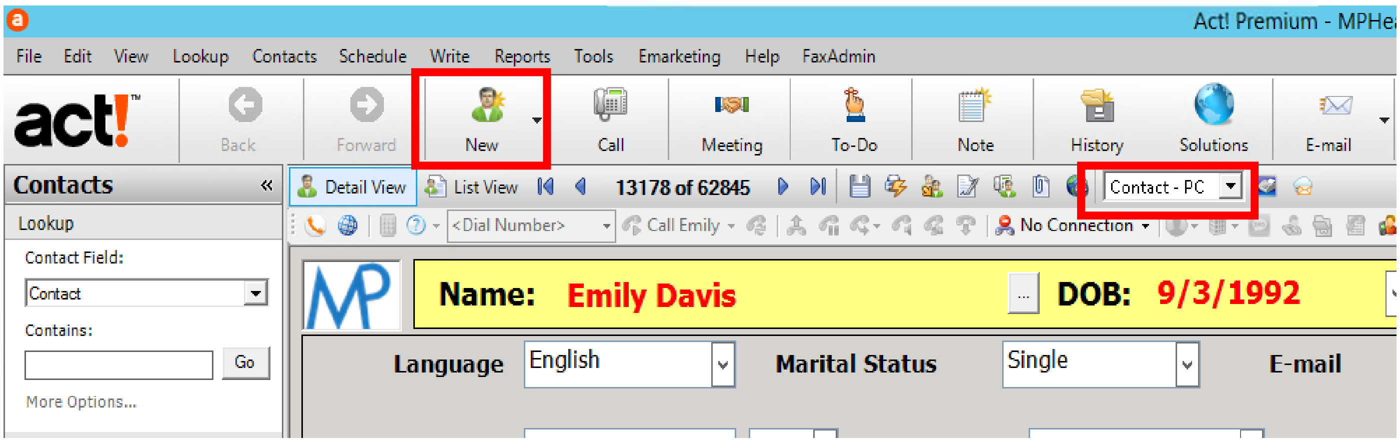
II. How to create a new client:



1. Click on the icon that says "New"
2. Be sure you are on the correct layout by clicking on the dropdown menu:

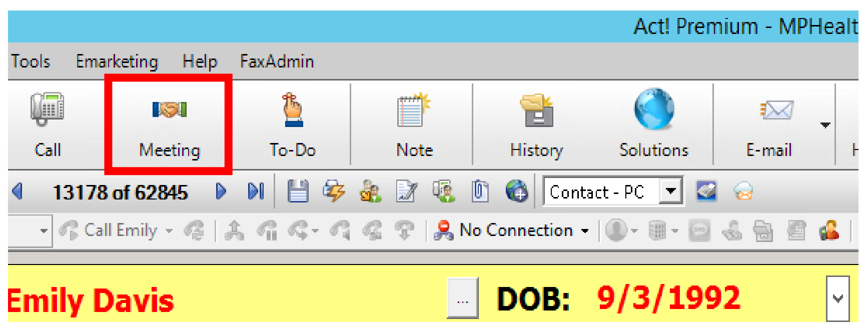
LT = Laptop

PC = Desktop Computer

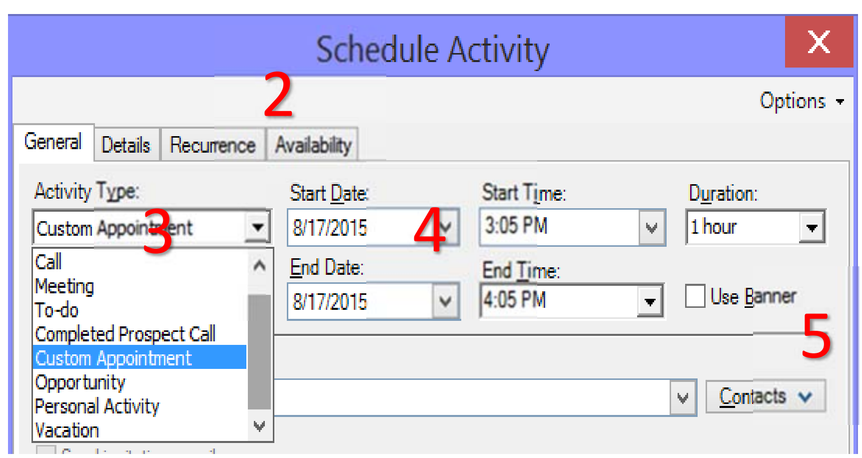


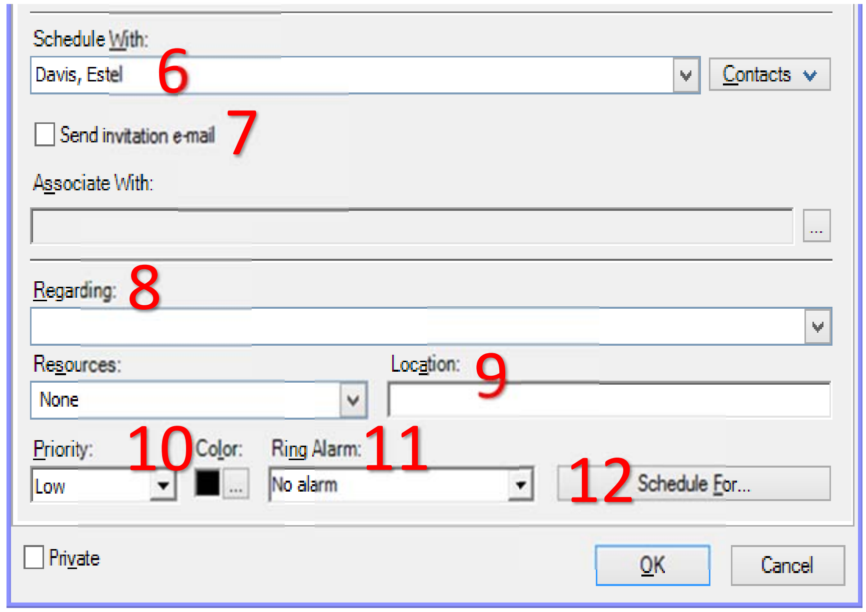
III. How to schedule an appointment

1. Click on the "Meeting" Icon.



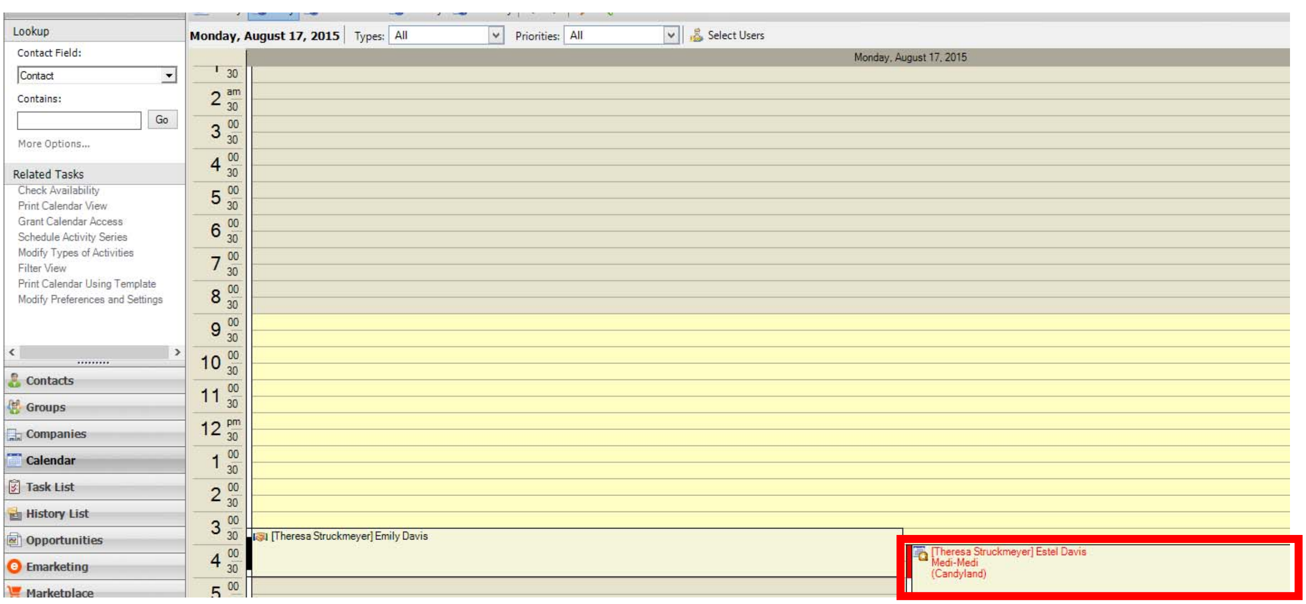
2. A Schedule Activity box will appear.
3. Click on the dropdown arrow to change the activity type to "Custom Appointment".
4. Set the date, time, and duration of the appointment. The end date and time will auto fill.
5. DO NOT check mark "Use Banner".



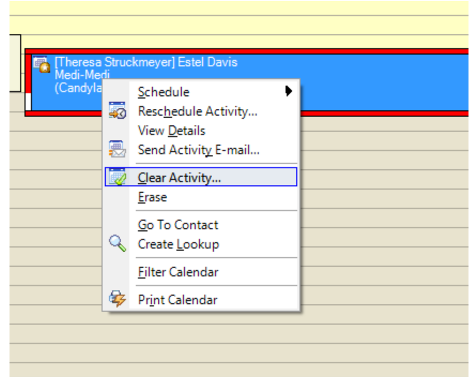


6. The “Schedule With” field auto fills with the contact you are currently on. If you are sending an email invitation to an agent, insert their name here as well by selecting the dropdown “Contacts” and then “Select Contacts.”
7. If this is checked and you click ok, Outlook will open up an email with details of the appointment. It will be sent as an Outlook calendar event. (Email sync must be set up.)
8. The “Regarding” field can be used for minor details. (Ex: Follow-up, Medi-Medi, IPA Change, etc.) Open the dropdown menu for more items. Extra details can be places in the tab labeled “Details.”
9. Fill in the complete address in the “Location Field.”
10. Follow the color chart to choose a color and priority level.
11. You can set a reminder alarm by selecting the dropdown for “Ring Alarm.” A pop-up reminder will appear prior to the meeting based on what you set it as. No alarm will not appear as a pop up.
12. If you are a CSR, you need to select the option “Schedule For.” Note: you can only schedule for ACT users. Both the CSR who created the activity and the Agent will be able to view and edit this activity on the calendar. (The activity will only appear on the calendar for the person it was scheduled for.) CSR’s, don’t worry about getting credit for the sale, the system automatically ties your name to the appointment.
13. Click OK.

You can now view this appointment in your calendar.

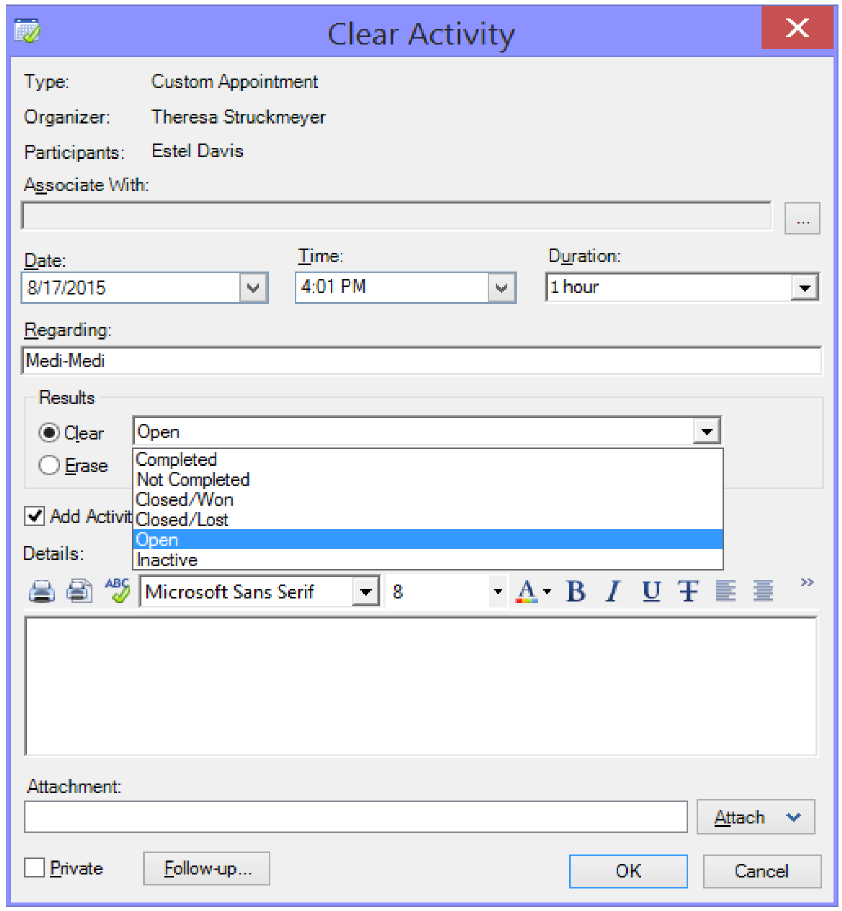


14. From this view, you can clear the activity once the appointment has been completed. Just right click on the appointment and click "Clear Activity."



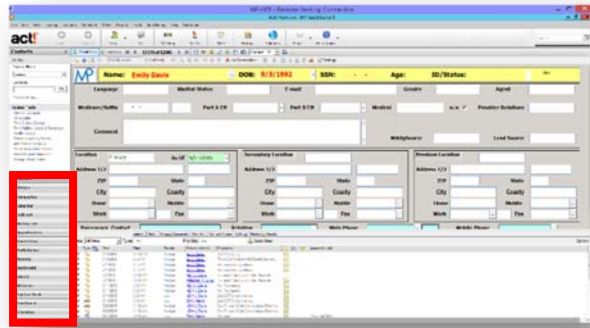
15. A new dialogue box appears.
16. Click the dropdown in the "Results" field and choose the end verdict from the list provided. If the appointment did not go as planned, explain in the "details" field below.
17. Once the appointment has been cleared, it will show greyed out, but it is still accessible.

    *It is important to clear an activity when the appointment has been completed so that we may run reports accurately.

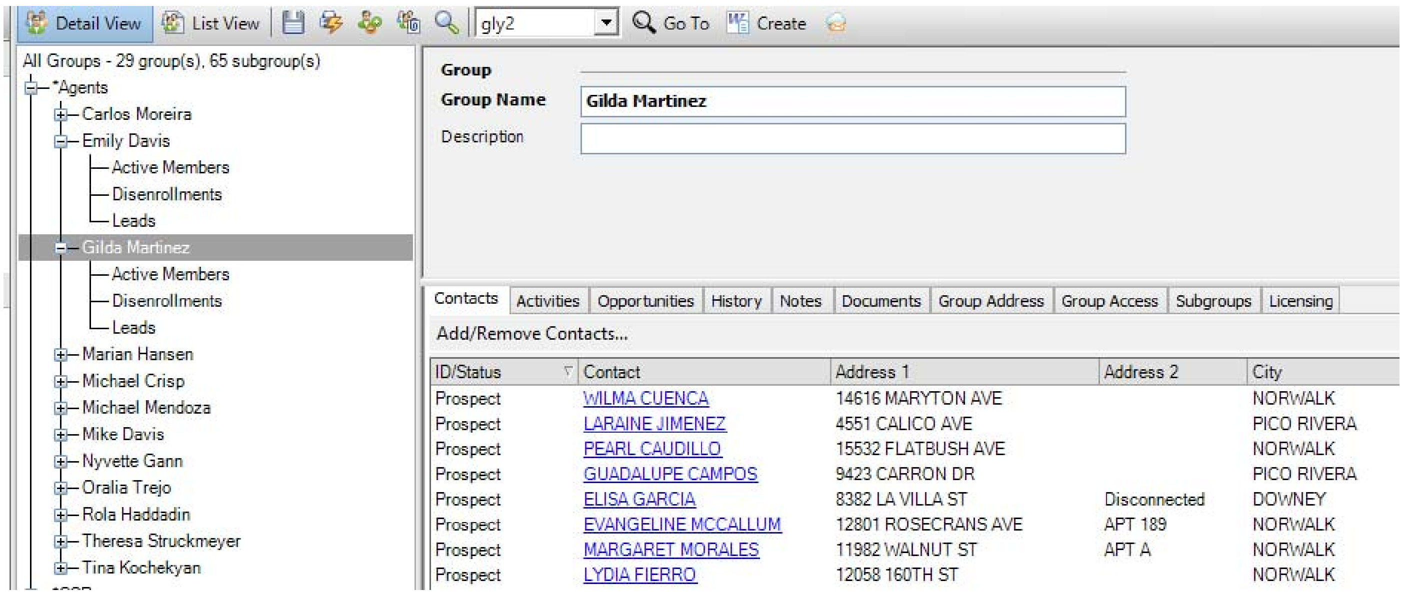


IV. **Groups**

Groups are a great way to view and track all the clients in your book of business. We have groups already set up by <u>Active Members, Disenrollments, and Leads</u>.

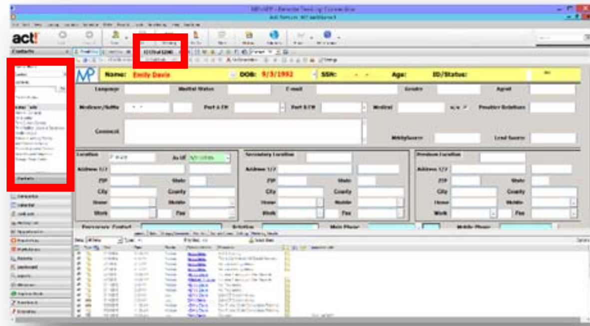


1. Click on “Groups” in the navigation panel.
2. Open the Group labeled “Agents.” Choose your name. *You will be able to see the titles of other groups, but you will not be able to view them unless you are granted access.

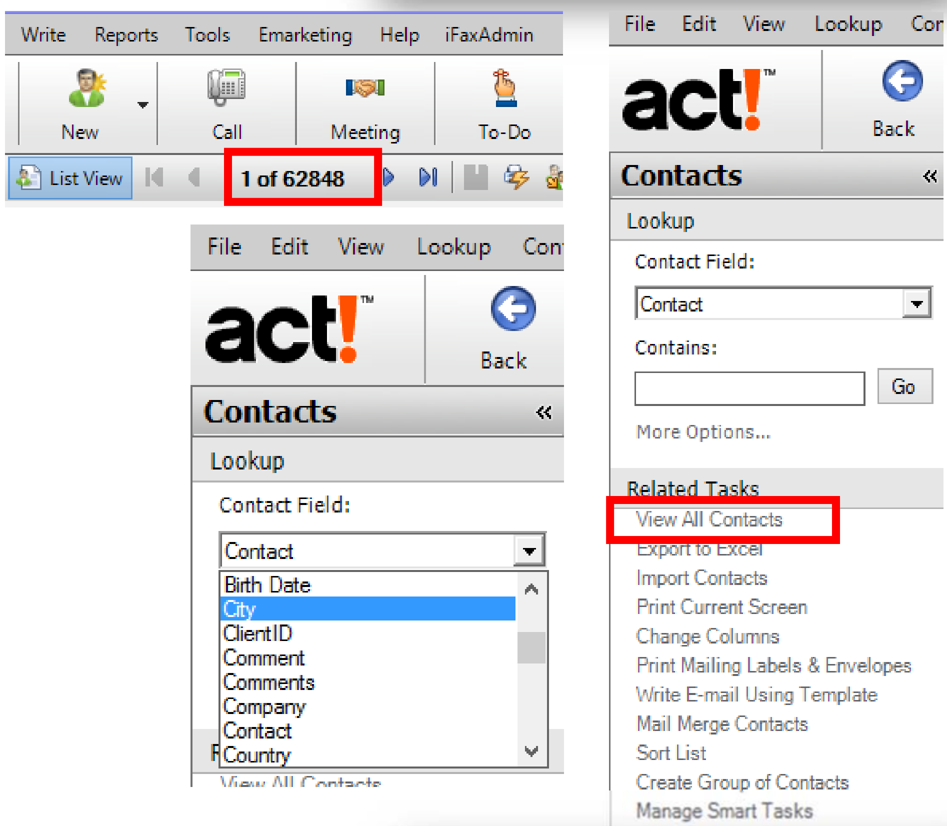


3. When your name is highlighted [as shown above] you are viewing your entire database including prospects, active and inactive members, etc. When you select the subgroups below your name, you will show a filtered view of your book of business. The “Leads” subgroup is for administrators to push leads to you, so check them often and we will email you when we add new ones to this list.

V. How to search for clients

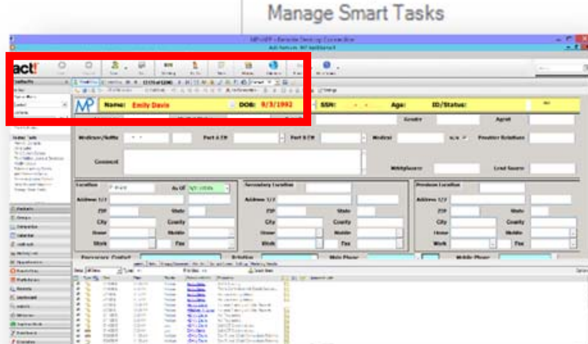


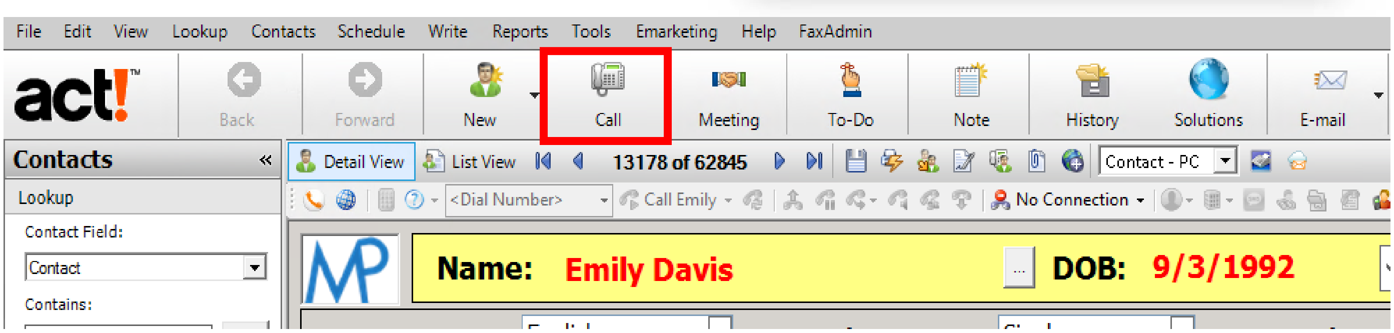
1. First, be sure you are currently viewing "All Contacts." It should then show the total number of clients in your system.
2. Use the search field on the left to search by any item in the dropdown menu.



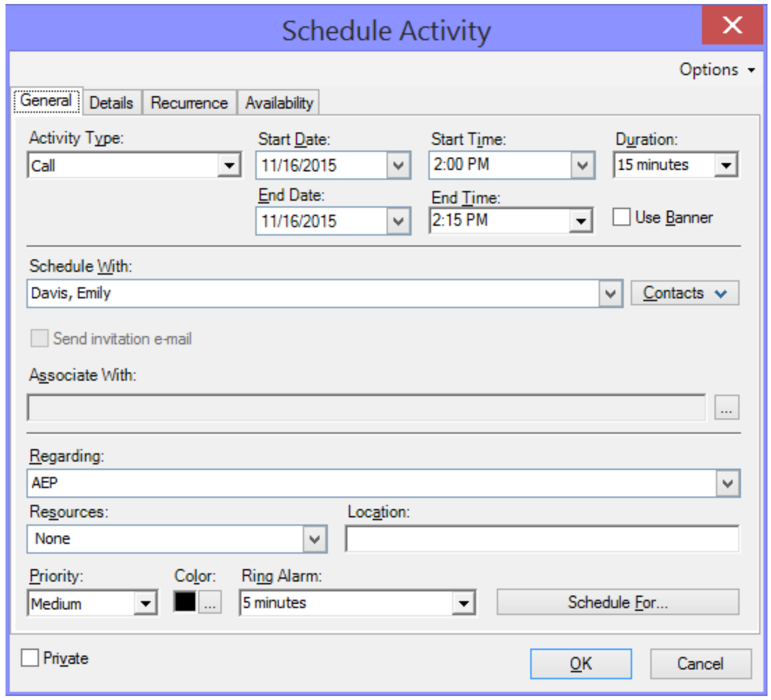
VI. How to schedule an X-Date

1. First, go to the client's file that you wish to create an X-date for. Then, click on the icon "Call."





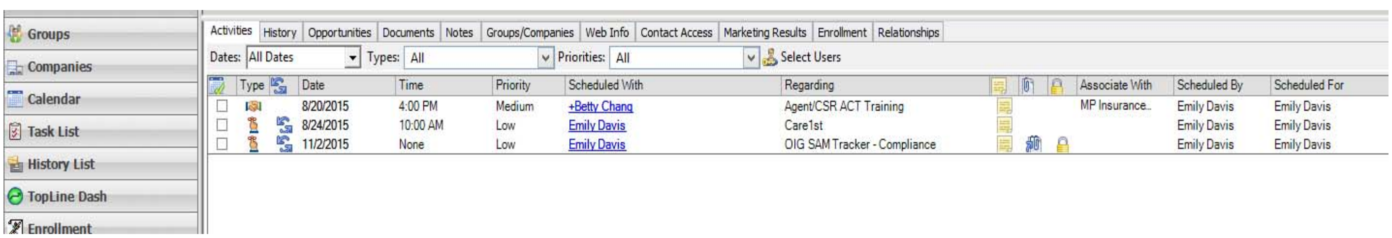
2. A new dialogue should appear. The set-up will be similar to before, however, in the "Regarding" field insert AEP. And because this Activity is a call, make the color black. Also, the date will be sometime in the future during open enrollment. *Be sure to write good notes in the "Details" tab as well.
3. Alternately, if you are scheduling a future meeting to discuss this plan, instead of clicking on "Call" you would click on "Meeting" or simply change the Activity Type using the dropdown.



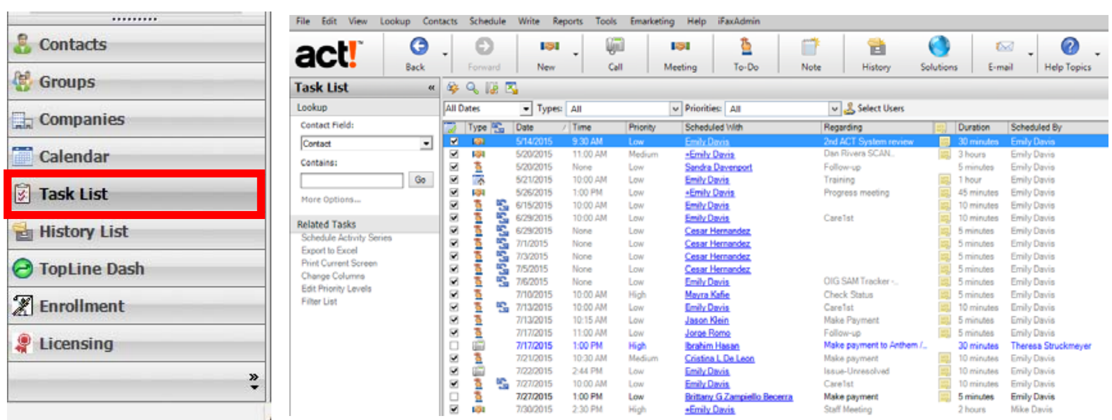
VII. How to check tasks, calls, appointments, to-dos, meetings, etc.

There are several places where you can view this information.

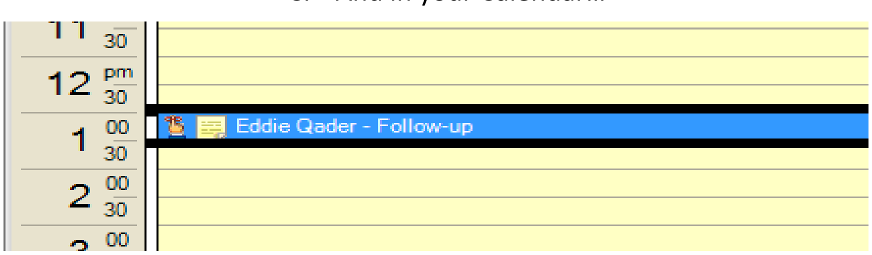
A. On your own record under the Activities tab…



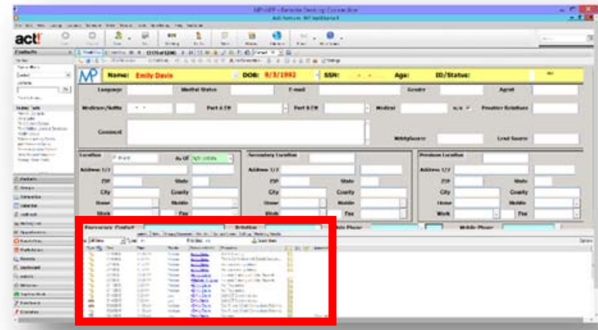
B. In the Task List…(Recommended)



C. And in your Calendar…

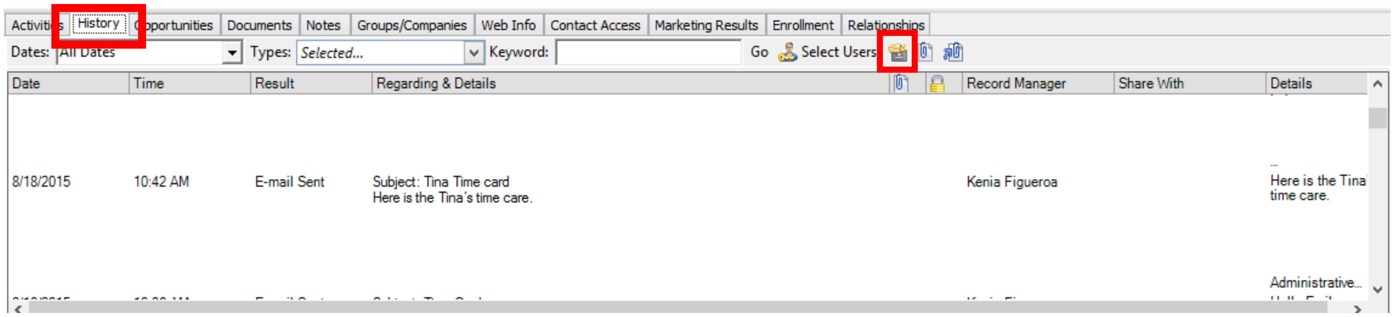


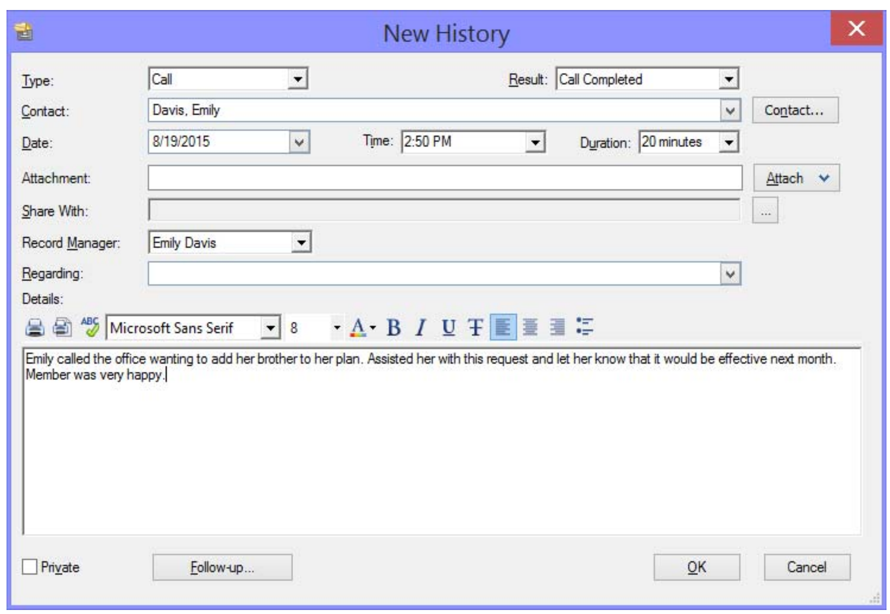
VIII. Creating Notes and Histories for Clients



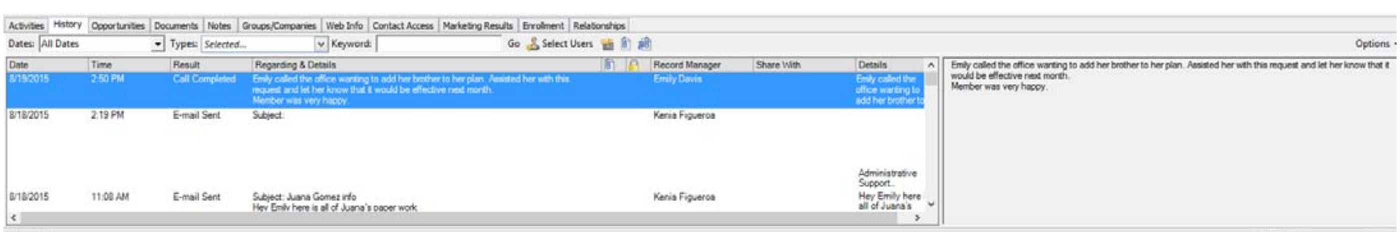
- Notes are used for writing important information such as log-in user names and passwords, case #s, and other information you can't be put anywhere else.
- History tracks changes made to the client's file, AND is used for writing notes based on contact with a member via phone, email, or in person. For example, if a member calls to add a member to their plan.

1. When you are on the client's record, click on the History tab. Then, click on the file cabinet icon next to "Select Users."

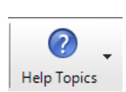




2. A New History box will open.
3. Use the dropdown in the "Type" field to choose the method of contact with the member.
4. The date and time auto fills. Insert the duration of the call and insert notes in the "Details" field.



5. The record will then update in the history tab.
   *Once the record has been made, you cannot edit or delete it.

**For extra help that has not already been discussed, you can click on  or contact Emily Davis.