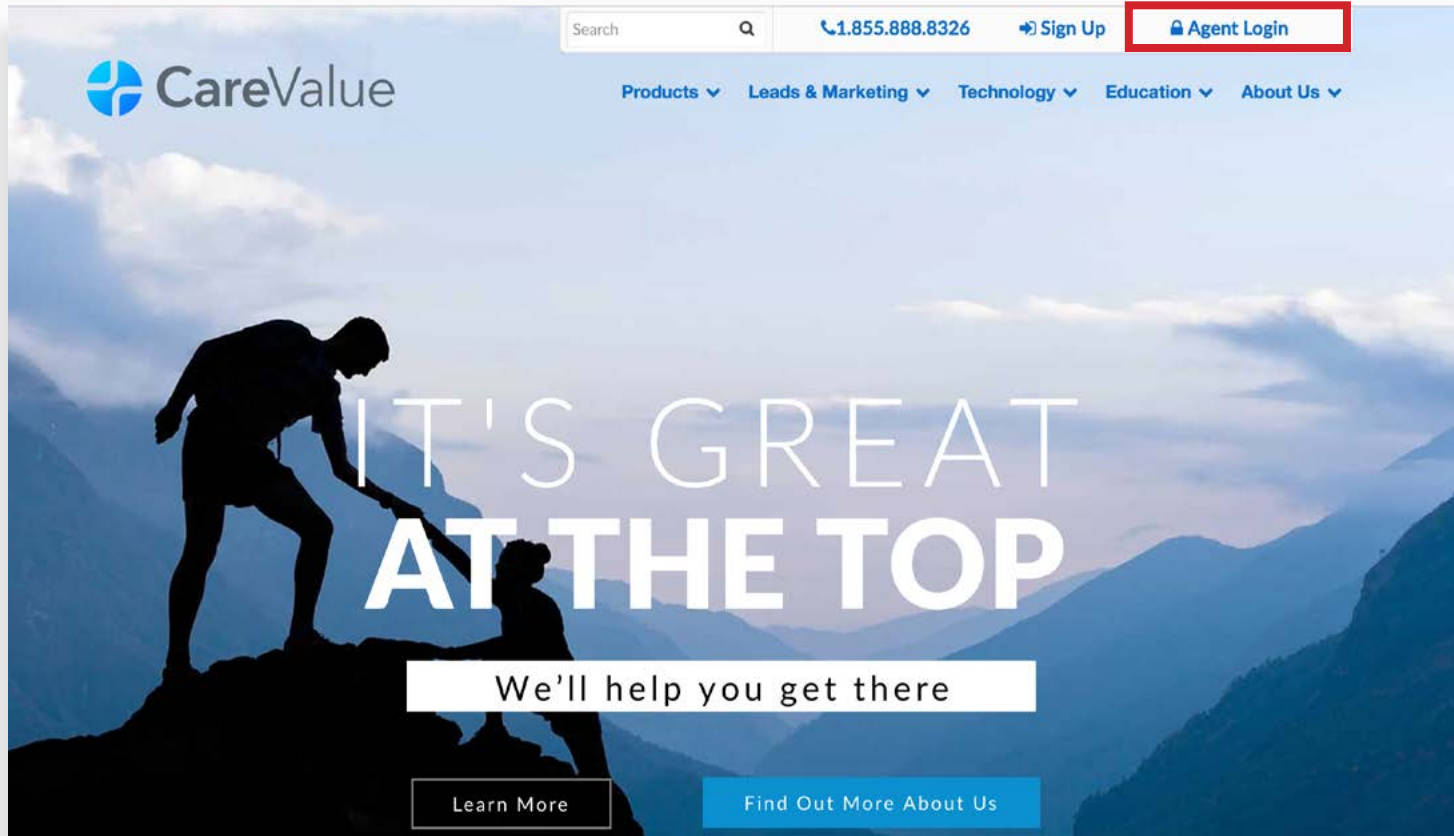


New Business Submission Secure Application Manager (SAM)

Step-by-Step Application Upload Guide



Go to carevalue.com and select “Agent Login”.

You’ll be prompted to enter your AllRep™ user name and password on the next screen.



SIGN IN

[Forgot your password?](#)

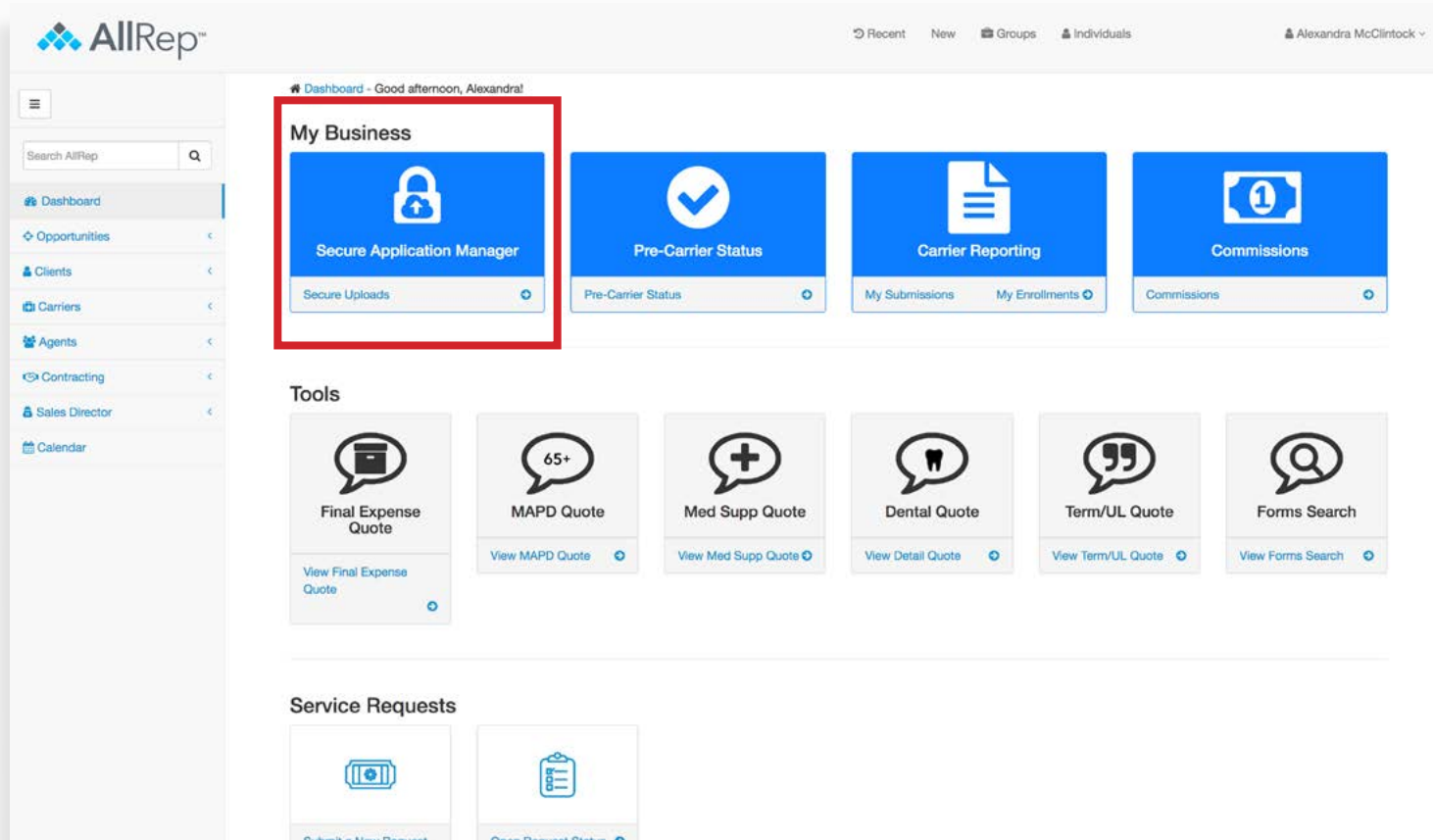
Sign In

[Not registered? Create an account](#)

Care Value - Senior, Life, Health
1.855.888.8326

Enter your user name and password, then click “Sign-In”.

Your user name is your email address. If you have forgotten your password, you may select the “**Forgot Your Password**” button to reset it.



After you log in to AllRep™ you will be taken to the main agent dashboard.

From here you can generate quotes, check your pre-carrier application status, view carrier reporting, track commissions, and upload new applications using the Secure Application Manager (SAM).

To begin a new application upload, select the “**Secure Application Manager**” icon in the left-hand corner of the AllRep™ dashboard.

The screenshot displays the AllRep web application interface. At the top left is the AllRep logo. The top right shows navigation options: Recent, New, Groups, and Individuals, along with a user profile for Alexandra McClintock. A left sidebar contains a search bar and a menu with items: Dashboard, Opportunities, Clients, Carriers, Agents, Contracting, Sales Director, and Calendar. The main content area is titled 'Dashboard / New Business Application' and features two tabs: 'Submit New Application' (active) and 'Pre-Carrier Status'. The 'New Business Application' form is shown with a progress bar at the top: Step 1 Beneficiary Info (active), Step 2 Plan Info, Step 3 Attach Files, and Step 4 Review App. Below the progress bar is a dropdown menu for 'Select' with two options: 'Already Submitted to Carrier - Save and archive only' and 'Submit to Carrier for processing' (which is selected and highlighted in blue). Below the dropdown are three input fields: 'Beneficiary Last Name', 'Beneficiary Zip Code', and 'Agent' (with a 'Select' dropdown). At the bottom of the form is a 'Check Opportunities' button.

Start your application by choosing the Application Disposition.

Already Submitted to Carrier-Save and Archive Only: The agent has already submitted the application but would like it to be securely archived by New Business.

Submit to Carrier for Processing: This is a brand new application. The agent would like the New Business department to submit this application to the carrier.

New Business Application

Step 1 Beneficiary Info Step 2 Plan Info Step 3 Attach Files Step 4 Review App

Application Disposition

Submit to Carrier for processing

Beneficiary Last Name

Smith

Beneficiary Zip Code

14607

Agent

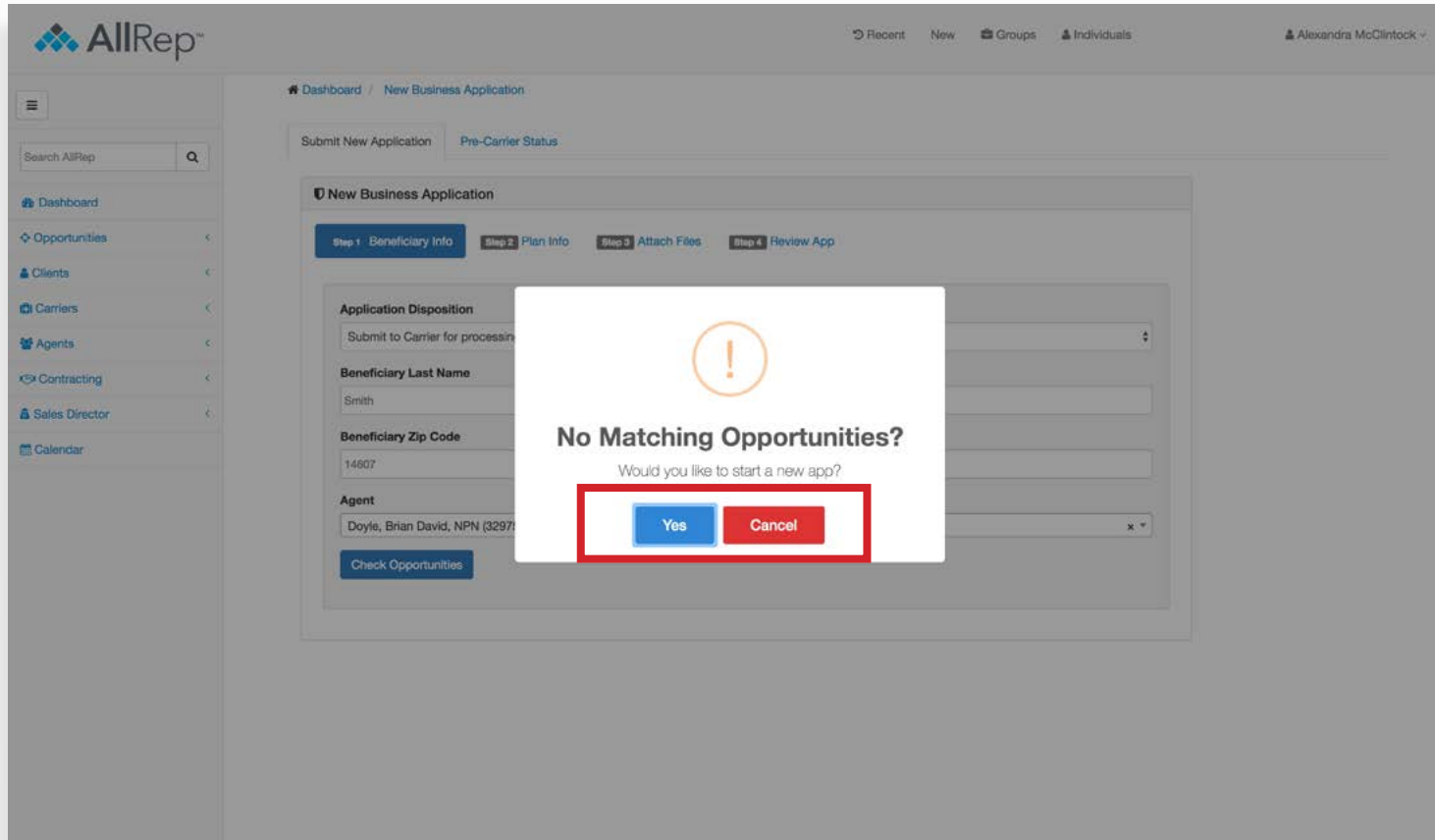
Doyle, Brian David

Check Opportunities

Next, fill in your beneficiary's information, including their last name and zip code.

In the Agent field, start typing the name of the writing agent and select his/her name from the drop down menu.

Select **“Check Opportunities”** to continue.



If there is a matching opportunity (existing lead) it will appear in a pop-up window at this time.

If there are no matching opportunities you will be asked to create a new app, select the “Yes” button.

Agents <

Contracting <

Sales Director <

Calendar

Submit to Carrier for processing

Beneficiary Last Name
Smith

Beneficiary Zip Code
14607

Agent
x

Check Opportunities

Beneficiary First Name
John

Beneficiary Last Name
Smith

Beneficiary HICN
1111111

Beneficiary MBI
1111111

Beneficiary DOB
09/20/1950

Beneficiary Zip Code
14607

Writing Agent
Doyle, Brian David x

Previous

Next

When you create a new app, you will be prompted to fill in additional information.

Required Information:

- Beneficiary first name
- Beneficiary last name
- Beneficiary HICN
- Beneficiary MBI
- Beneficiary date-of-birth
- Beneficiary zip code
- Writing agent

Fill in all fields and click “Next”.

The screenshot shows the AllRep web application interface. At the top, there is a navigation bar with 'Recent', 'New', 'Groups', and 'Individuals' tabs, and a user profile for 'Alexandra McClintock'. The main content area is titled 'New Business Application' and includes a progress indicator with four steps: 'Step 1: Beneficiary Info', 'Step 2: Plan Info' (highlighted in blue), 'Step 3: Attach Files', and 'Step 4: Review App'. Below the progress indicator, there are several form fields: 'Product Type' (dropdown menu with 'Medicare Advantage' selected), 'Plan Effective Date' (text input with '01/01/2018'), 'Signature Date' (text input with '01/01/2018'), 'Agent Receipt Date' (text input with '01/01/2018'), 'Select Carrier' (dropdown menu with 'UnitedHealthcare' selected), 'Select Plan' (dropdown menu with 'UnitedHealthcare MedicareComplete Choice Plan 1 (Regional PPO)' selected), and 'Select Form' (dropdown menu with 'R5342-001' selected). At the bottom of the form, there are two buttons: 'Previous' and 'Next'. The 'Next' button is highlighted with a red rectangular box.

In section two of the upload process you will need to enter plan details.

Required Information:

- Product type
- Plan effective date
- Signature date
- Agent receipt date
- Carrier
- Plan
- Form

Fill in all fields and click “Next”.

© AllRep™

Recent New Groups Individuals Alexandra McClintock

Dashboard / New Business Application

Submit New Application Pre-Carrier Status

New Business Application

Step 1 Beneficiary Info Step 2 Plan Info Step 3 Attach Files Step 4 Review App

Attach Files

Drop files here or click to choose files.

(Max file size 15 MB.)

Previous Next

Attach your app documents.

Acceptable file types include:

- PDF (Preferred)
- PNG
- JPG

The maximum allowable file size is 15MB.

You can attach your files by dragging and dropping them into the highlighted area, or by clicking within the box.

© AllRep™

Recent New Groups Individuals Alexandra McClintock

Dashboard / New Business Application

Submit New Application Pre-Carrier Status

New Business Application

Step 1 Beneficiary Info Step 2 Plan Info Step 3 Attach Files Step 4 Review App

Attach Files

PDF 0.3 MB Study_Guid... Remove file Select File Type

Previous Next

After you have attached all of your files, select the **“Next”** button to finalize the application.

Please remember, all applications must be signed by both the beneficiary and the writing agent.

We cannot accept any applications that have not been signed by both parties.

© AllRep™

Recent New Groups Individuals Alexandra McClintock

Dashboard / New Business Application

Submit New Application Pre-Carrier Status

New Business Application

Step 1 Beneficiary Info Step 2 Plan Info Step 3 Attach Files Step 4 Review App

Beneficiary Information Review

Beneficiary First Name: John

Beneficiary Last Name: Smith

Beneficiary HICN: 1111111

Beneficiary MBI: 1111111

Beneficiary DOB: 09/20/1950

Beneficiary Zipcode: 14607

Plan Information Review

Product Type: Medicare Advantage

Carrier: UnitedHealthcare

Plan: UnitedHealthcare MedicareComplete Choice Plan 1 (Regional P PO)

Form: Select Form R5342-001

Effective Date: 01/01/2018

Signature Date: 01/01/2018

Agent Receipt Date: 01/01/2018

File Information Review

Previous Save Application

Review your application information carefully before submitting it to New Business.

If you need to edit information, you can use the **“Previous”** button to navigate back to the appropriate screen.

Once you click **“Save Application”** you will no longer be able to edit the app.

Dashboard / New Business Application

Submit New Application Pre-Carrier Status

Status:

Copy CSV Excel PDF Print Column visibility

Display 500 First Previous 1 Next Last

ID	Member Name	Carrier	Product Type	Agent	Receipt Date	Submit to CVI	Status	CVI Status Date	
CVI-52	test, Test	UnitedHealthcare	Medicare Advantage	Hamann, Todd	09/27/2017	09/29/2017 16:26	NEW	09/29/2017 16:26	Process App
CVI-53	Bancroft, Roselee	UnitedHealthcare	Medicare Advantage	Allen, Todd James	09/30/2017	09/30/2017 09:35	NEW	09/30/2017 09:35	Process App
CVI-55	claroni, John	UnitedHealthcare	Medicare Advantage	Shriver, Laura	10/2/2017	10/2/2017 12:32	NEW	10/2/2017 12:32	Process App
CVI-37	Walsh, Heidi	Excellus Health Plan, Inc	Medicare Advantage	Allen, Todd James	09/26/2017	09/26/2017 11:45	J. Roach (233 min)	10/2/2017 09:58	Process App
CVI-46	Smith, Doris	UnitedHealthcare	Medicare Advantage	Allen, Todd James	09/28/2017	09/28/2017 16:48	T. McCann (26 min)	09/28/2017 17:02	Process App
CVI-49	Clark, Joe	Excellus Health Plan, Inc	Medicare Advantage	Ahrens, Jane A	09/29/2017	09/29/2017 09:42	J. Roach (235 min)	10/2/2017 09:59	Process App
CVI-50	White, Barbara	UnitedHealthcare	Medicare Advantage	Allen, Todd James	09/29/2017	09/29/2017 11:19	J. Roach (236 min)	10/2/2017 09:58	Process App
CVI-51	Finks, Gerard	Excellus Health Plan, Inc	Medicare Advantage	Allen, Todd James	09/29/2017	09/29/2017 15:38	T. McCann (182 min)	09/29/2017 15:38	Process App
CVI-54	Roach, John	UnitedHealthcare	Medicare Advantage	Allen, Todd James	10/2/2017	10/2/2017 10:12	SUBMITTED	10/2/2017 13:02	Process App
CVI-39	Walsh, Heidi	UnitedHealthcare	Medicare Advantage	Allen, Todd James	09/27/2017	09/27/2017 09:49	INCOMPLETE	10/2/2017 10:00	Process App
CVI-41	Walsh, Heidi	Excellus Health Plan, Inc	Medicare Advantage	Allen, Todd James	09/21/2017	09/27/2017 10:02	INCOMPLETE	09/27/2017 10:02	Process App
CVI-35	Narrow, Ann	UnitedHealthcare	Medicare Advantage	Allen, Todd James	09/12/2017	09/25/2017 14:49	RE-SUBMITTED	09/28/2017 13:45	Process App
CVI-43	Zorn, Tom	UnitedHealthcare	Medicare Advantage	Allen, Todd James	09/27/2017	09/27/2017 16:37	RE-SUBMITTED	09/29/2017 09:57	Process App

After you have submitted an app, you can review its status in the “Pre-Carrier Status” tab.

New: Just submitted, has not been reviewed by our New Business team yet.

In-Progress: Being reviewed by New Business.

Submitted: The application has been sent to the carrier.

Incomplete: There are missing pieces of the application, or incorrect information; must be revised by the agent.

Re-Submitted: App has been sent back to the carrier after being revised by the agent.

Questions?

Give us a call at 585.577.1010 for additional assistance.