Kaiser Permanente Washington

Sunfire Onboarding Agent Guide

Medicare Advantage Online Quoting and Enrollment

Contents

Is this guide for me?

This guide applies to external Washington agents appointed, Medicare certified and ready-to-sell Kaiser Permanente Washington (KPWA) Medicare Advantage plans (Medicare Contract# H5050).

Agents selling KPWA Medicare Advantage, affiliated with American Senior Resources, Dan Redler (We Know Medicare), BRP (Guided Solutions), or HealthMarkets can continue using your agency's ConnectureDRX enrollment portal.

Agents selling both Kaiser Permanente Washington (KPWA) and Kaiser Permanente Northwest (KPWA), please note this guide is for the KPWA instance of Sunfire only. There is no change to how your currently quote KPNW plans (See Q&A for more information).

Where do I log in?

To quote Kaiser Permanente Washington Medicare Advantage plans log in to your Sunfire BlazeConnect (Field Agent Tool) at:

https://www.sunfirematrix.com/app/agent/kwa

What is my username and password?

I'm Brand New to SunFire…

- For the username, login using your email address. The email address used must be the one on file with Kaiser Permanente Washington.
- The password format is as follows: X# + [NPN] + first 3 letters of last name in lower case (No spaces and no + signs). For example, John Smith, who has an NPN 44332211 would have the following password: X#44332211smi
- If you'd like to change your password, you may do so after you've logged in.

I've used SunFire with another agency…

- You may already have a username and password for another agency to use the SunFire platform. If you are one of these users, you should be able to access both with your usual login credentials. When you login, you may see choice boxes like the one below. If so, just choose your agency.

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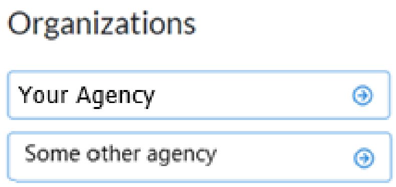
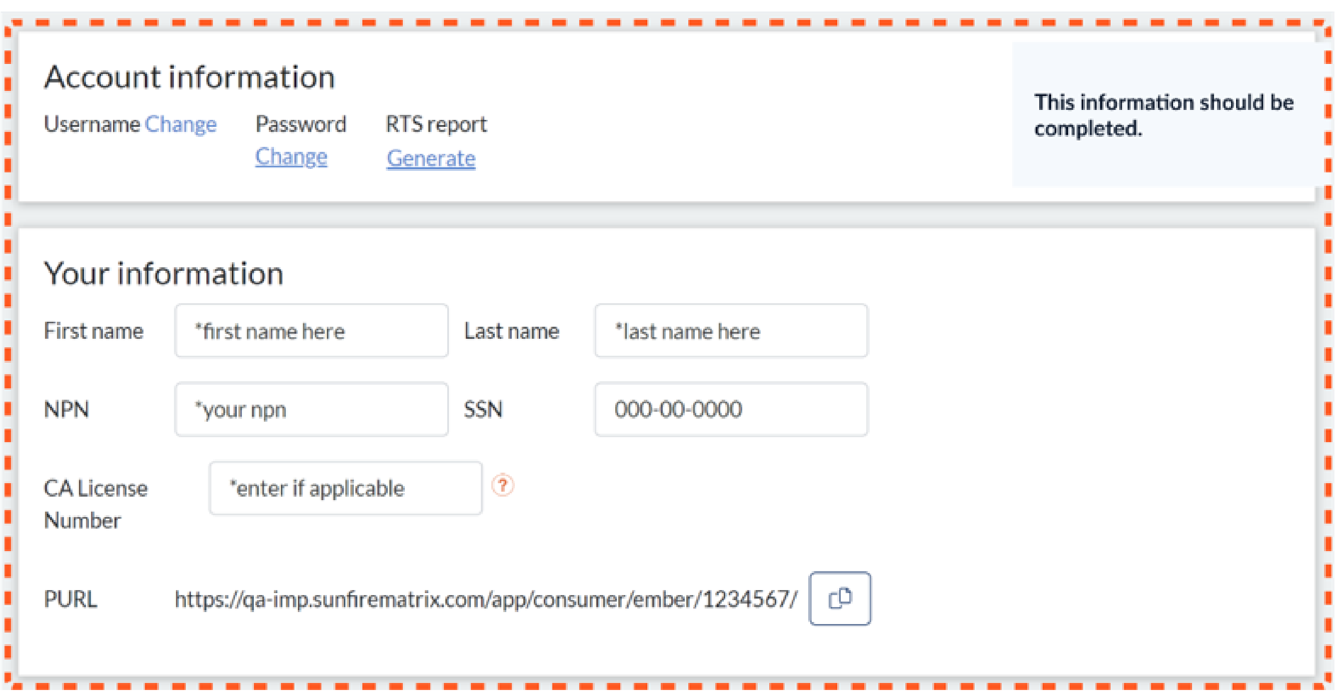


NOTE: The Sunfire website URL is different for quoting other KP region's Medicare Advantage plans. If you are appointed to sell for KPWA and another region, you will use the URL above to quote KPWA plans only. For quoting KP Northwest plans see the KPNW detail in the Q&A section of this guide.

Update Your Agent Profile

Log in to the SunFire Platform. Look for the gear icon in the lower left corner. Click on the gear icon and update your profile settings. Here, you can change your username, password, and update your notifications. If email and text notifications are selected, you will receive notifications to either or both when an enrollment you've quoted has been submitted.

NOTE: Email updates must be submitted to KPWA Producer Operations by emailing brokerappt.commission@kp.org.



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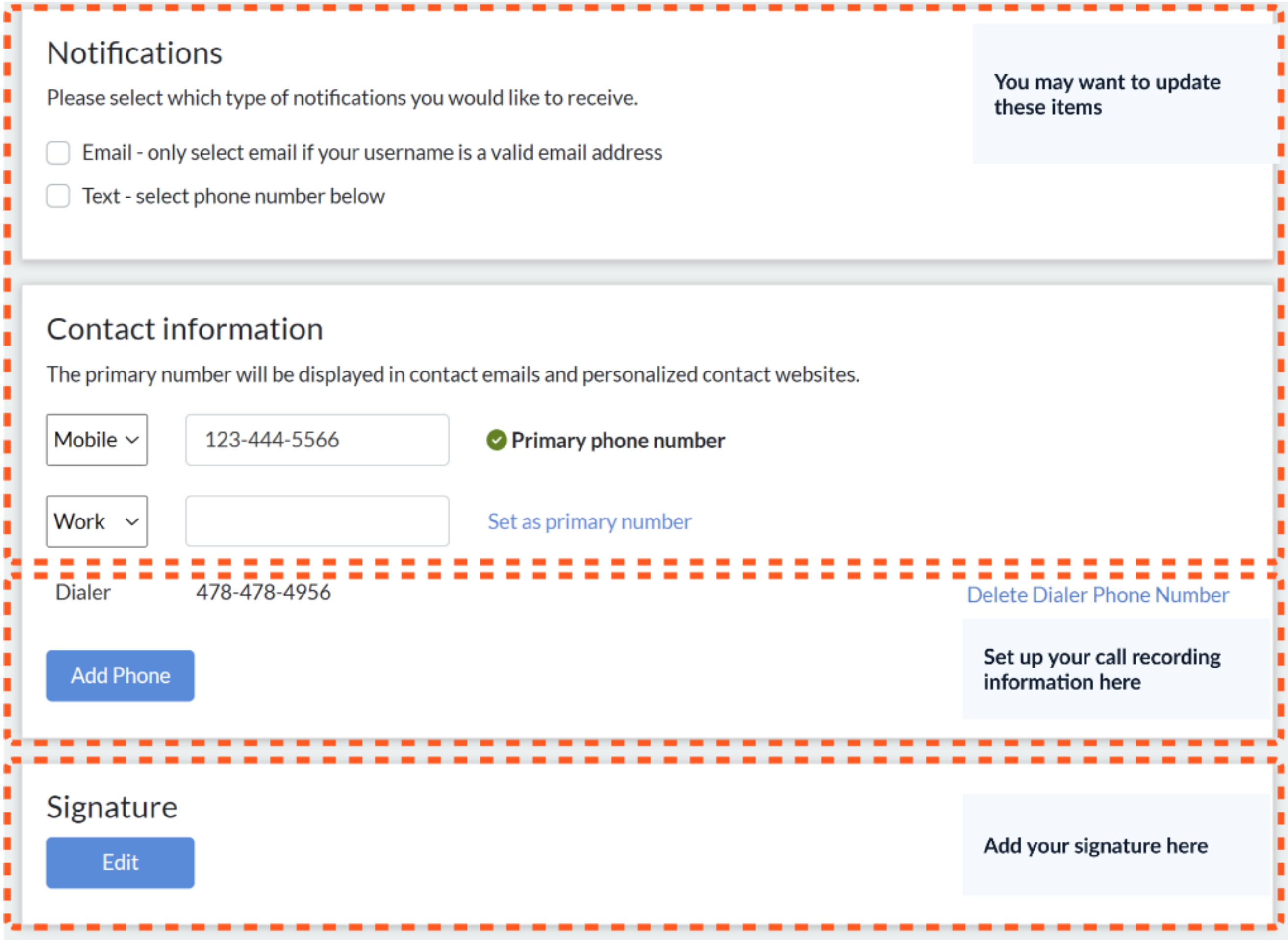
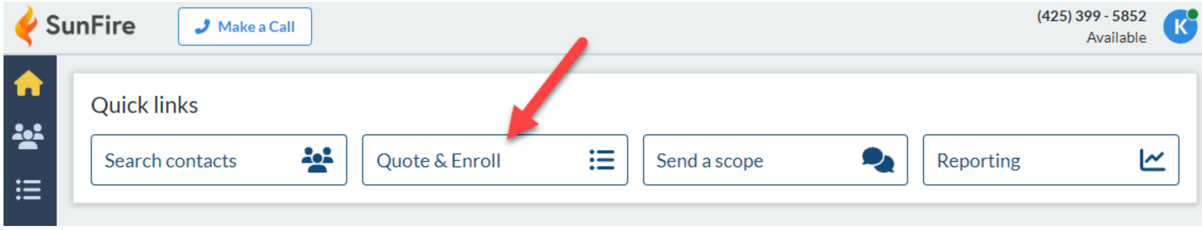
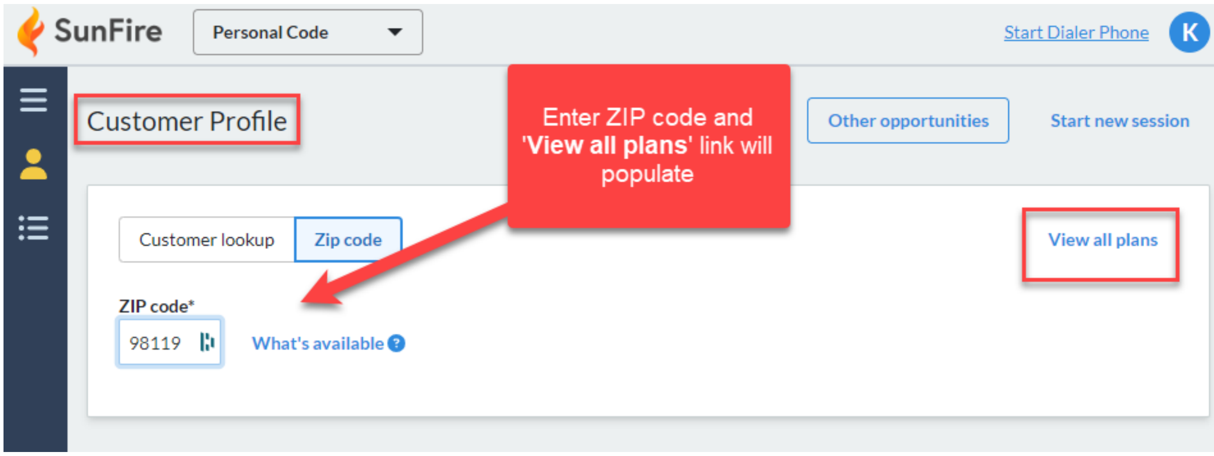


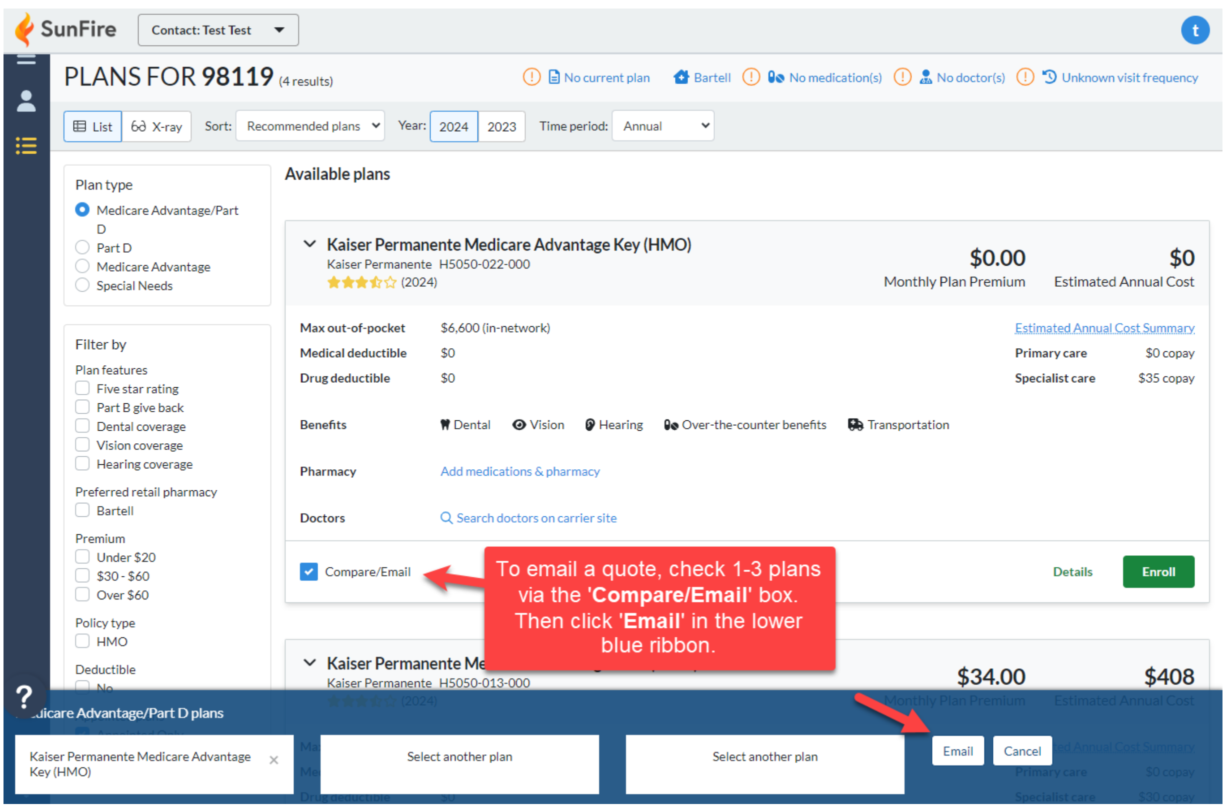
Q&A

Sending a Quote / Proposal - Quote & Enroll

To email a quote or proposal, start by clicking the **Quote & Enroll** tab from your agent dashboard. Once on the Customer Profile page, select Zip code look up, enter the ZIP code, and the '**View all plans**' link will populate on the right side of the page. Click to View all plans. Once on the Available plans page check the '**Compare/Email**' boxes for which plans you would like to email your client to review. You can email 1 to 3 plans.







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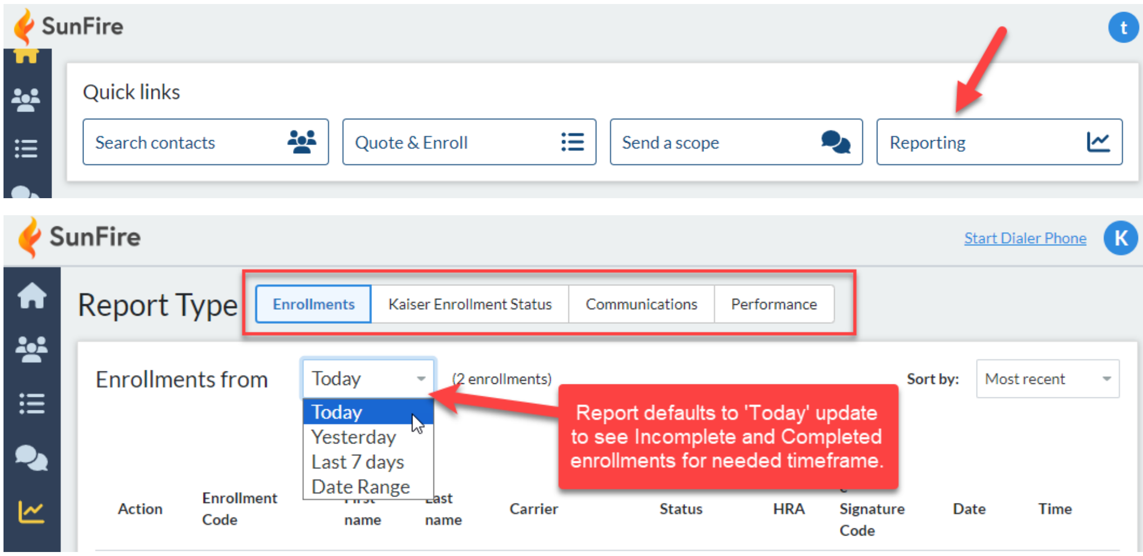
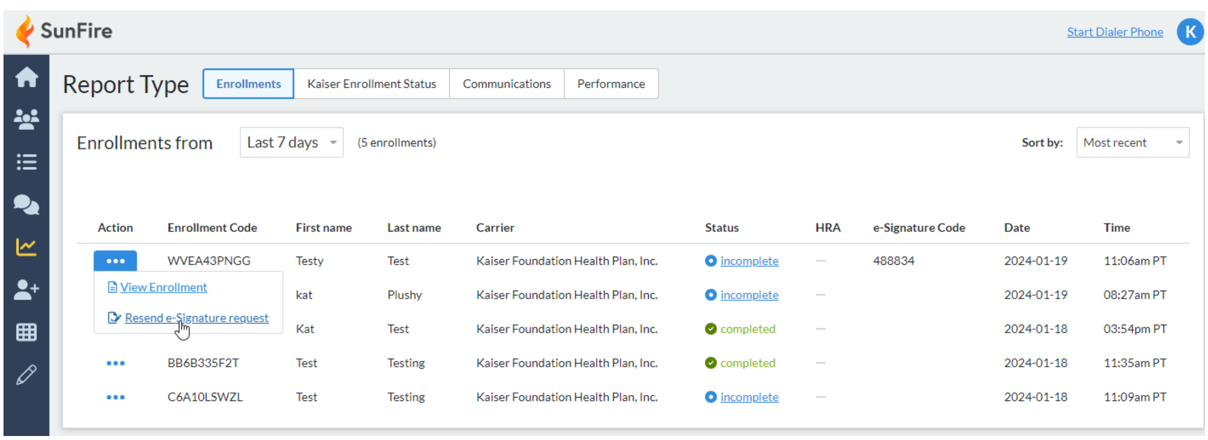
Checking Status – Reporting

The Reporting tab allows agents to see the status of sent proposals and enrollments. Once on the Report Type page, agents will see 4 reporting tabs:



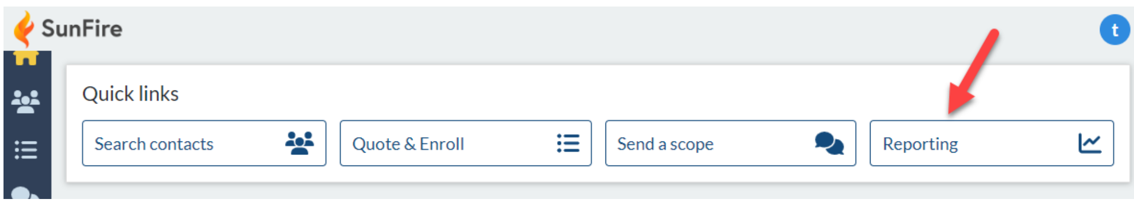
- **Enrollments** - See **enrollment form** status here. Status should show 'incomplete', 'completed' or 'error'. If 'error' click on the status to see next steps to correct the error. From this view agents can also see **e-signature Codes** or **personal codes** for incomplete enrollments and are able to resend the enrollment form generating a new code if needed.

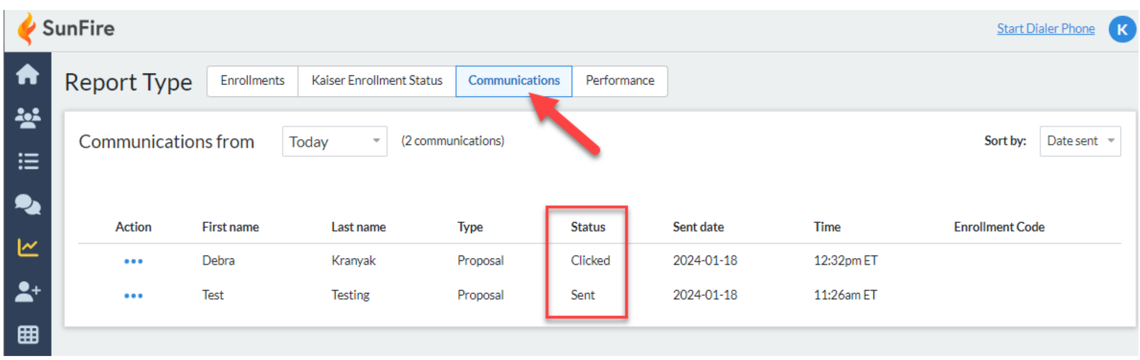


- **Kaiser Enrollment Status** – <u>expect no data</u>; at this time Kaiser Permanente Washington does not provide Sunfire a status file once an enrollment has been received at this time. Whether an enrollment was approved, denied, or cancelled will not be visible in Sunfire. Weekly

'*Confirmation of Medicare Advantage election forms*' email reports from kpwa.medicare@kp.org are sent to KPWA agents who have submitted enrollments communicating the prior week's submission's enrollment status'.

- **Communications –** See **Proposals/Quotes** that have been sent to a client. If you send a link to your purl or a plan proposal email, a record of when you sent and whom you sent it to will appear here. If a customer clicks on the link, the status will change to "Clicked." If they enroll in a plan, the status will change to "Enrolled" and the enrollment code for the app will be shown in the "Enrollment code" column. Enrollment app e-sig requests and SOA e-sig requests are tracked via those respective sections and will not show up in "Communications."

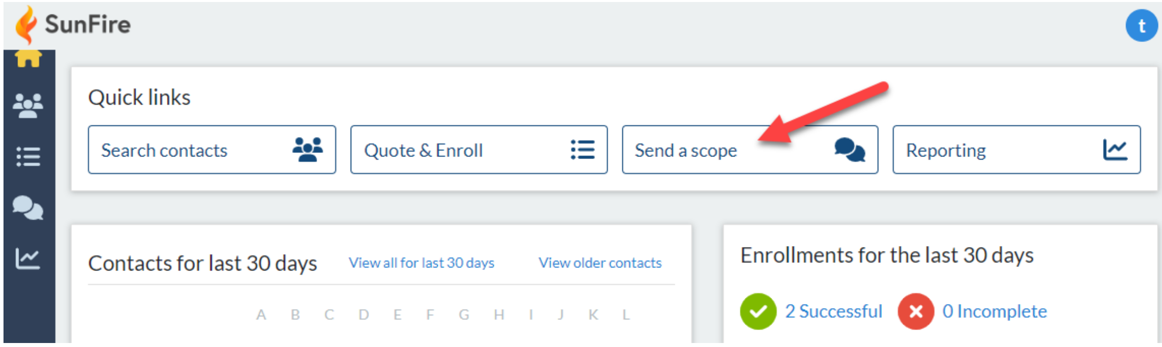


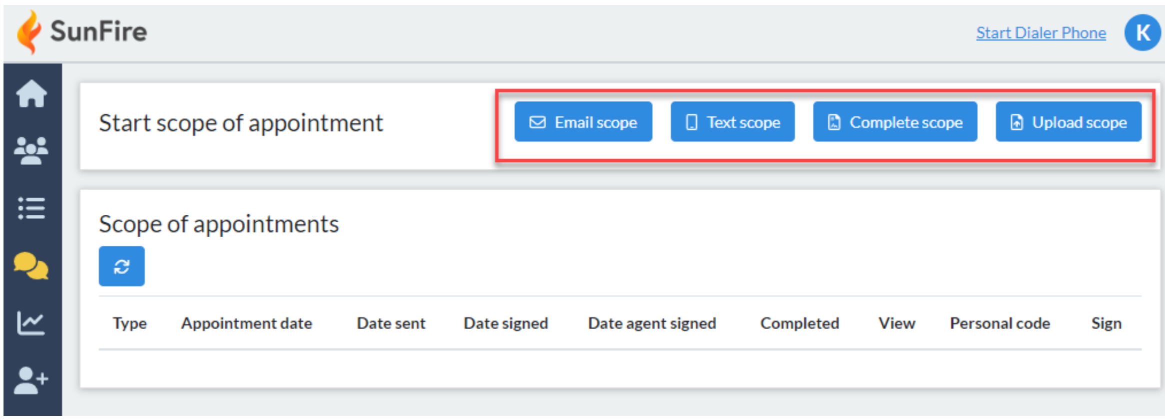


- **Performance** – Find data charts showing mix of enrollment types submitted and other analytic overviews.

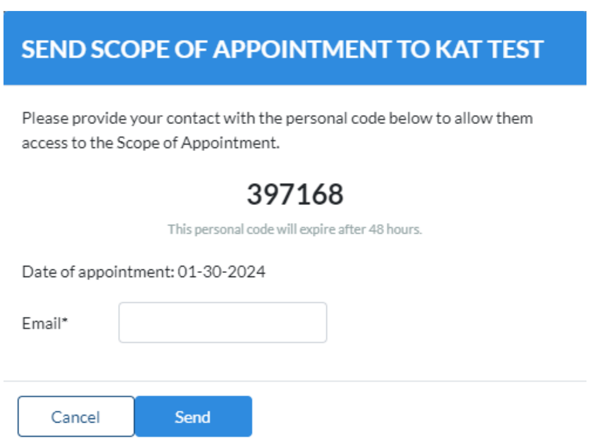
Scope of Appointment – Send a scope

To complete a **Scope of Appointment (SOA)** select the 'Send a scope' tab from your agent dashboard, then choose one of the 4 options:

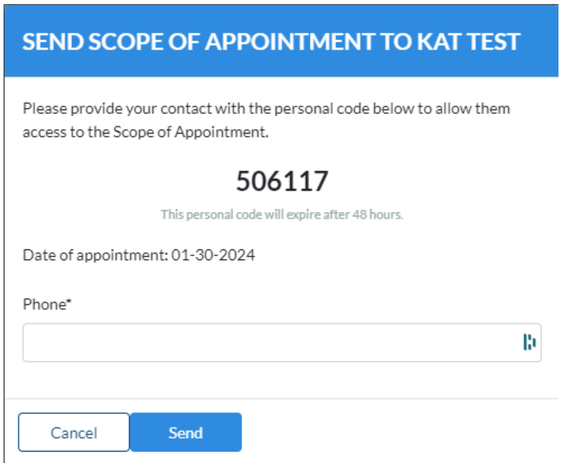




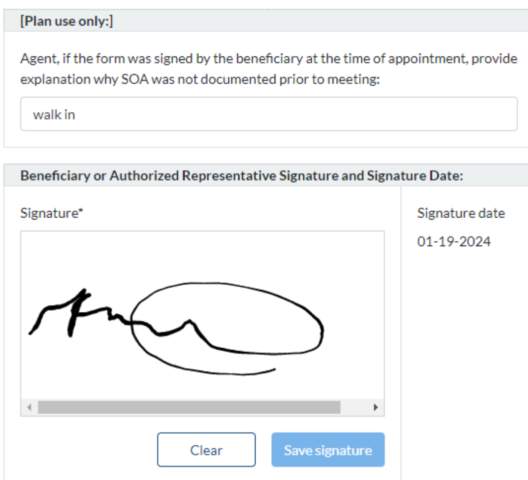
- **Email scope** – Agent will fill out the SOA and click email. Agent will enter their client's email and provide the client with the generated personal code separately via phone or email for the client to access the SOA in their email. Note: The SOA personal code will expire after 48 hours after which a new SOA would need to be generated.



- **Text scope** - Agent will fill out the SOA and click email. Agent will enter their client's phone number and provide the client with the generated personal code separately via phone or email for the client to access the SOA in via text. Note: The SOA personal code will expire after 48 hours, after which a new SOA would need to be generated.



- **Complete scope** – Use for in-person SOA completion; allows the agent to complete and the client to e-sign via a signature pad. Agent will be prompted to e-sign the SOA after the client has signed.

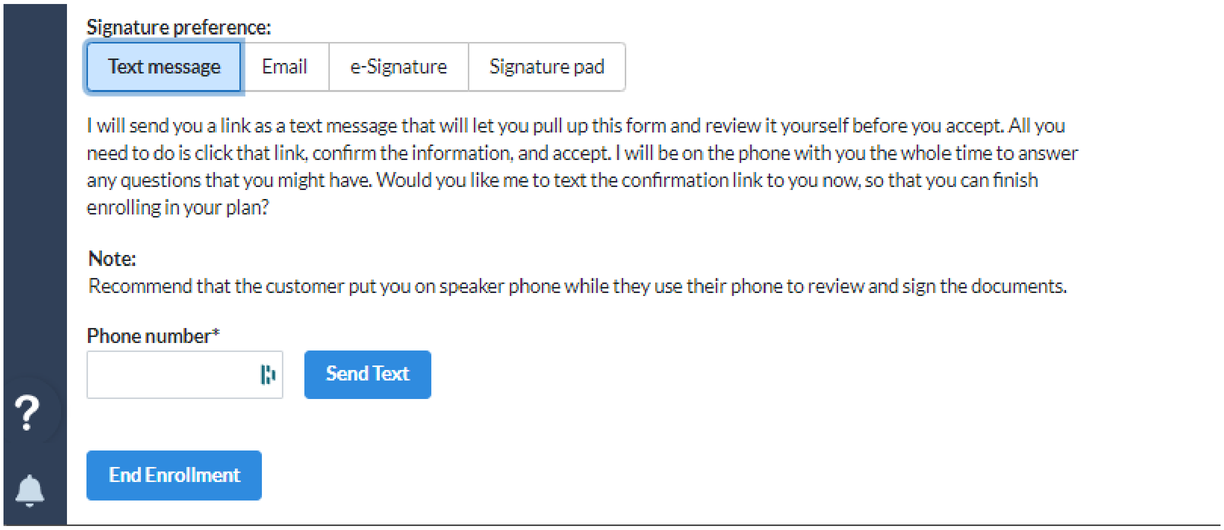


- **Upload scope** – Use to upload a paper SOA. Note: A contact/client profile needs to be completed or existing one selected to use this option.

Signatures

Agents can capture the client's enrollment signature via **4 options**:

- **Text message** – Will prompt the agent to enter the clients phone number, once 'Send Text' is clicked, a **personal code** will generate and message that the code will expire in 24 hours. The agent will need to provide the code to their client separately over the phone/text or email. The client will use the personal code and their date of birth to open the enrollment link they receive via text to review and e-sign the enrollment. Clicking 'End Enrollment' will not cancel or stop the client from completing the enrollment that was sent.



- **Email** – Will prompt the agent to enter the clients email, once 'Send Email' is clicked, a **personal code** will generate and a message that the code will expire in 24 hours. The agent will need to provide the code to their client separately over the phone/text or email. The client will use the personal code and their date of birth to open the enrollment link they receive via email to review and e-sign the enrollment. Clicking 'End Enrollment' will not cancel or stop the client from completing the enrollment that was sent.

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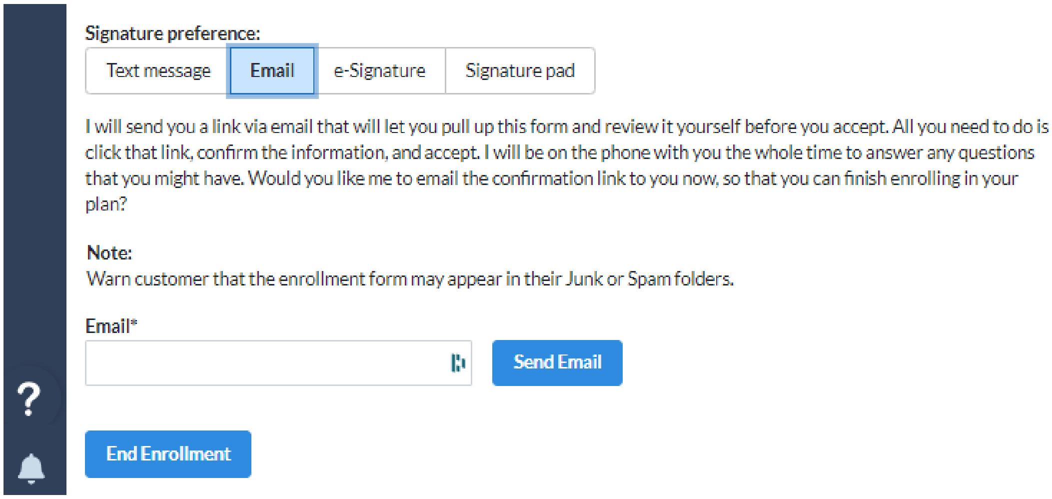
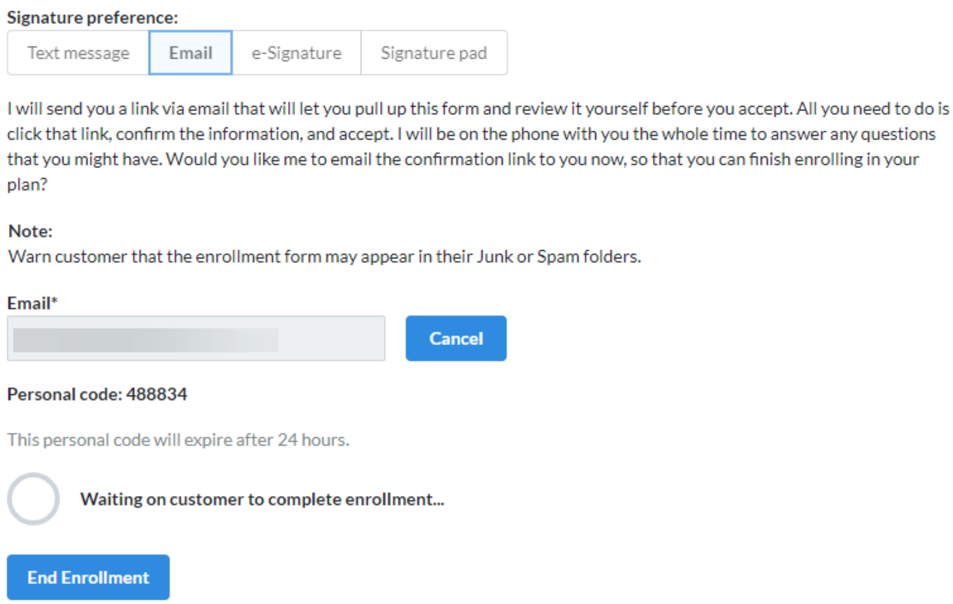
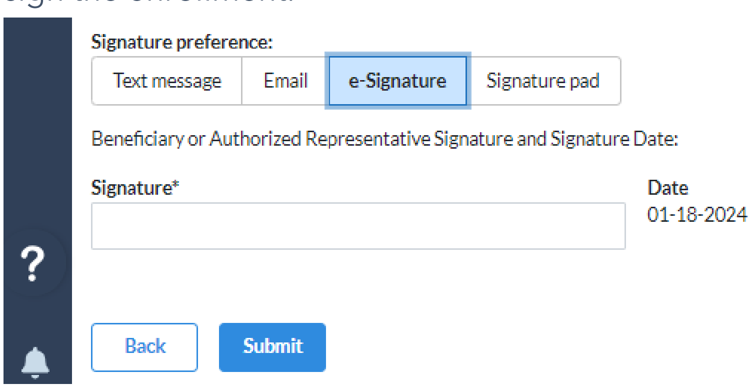
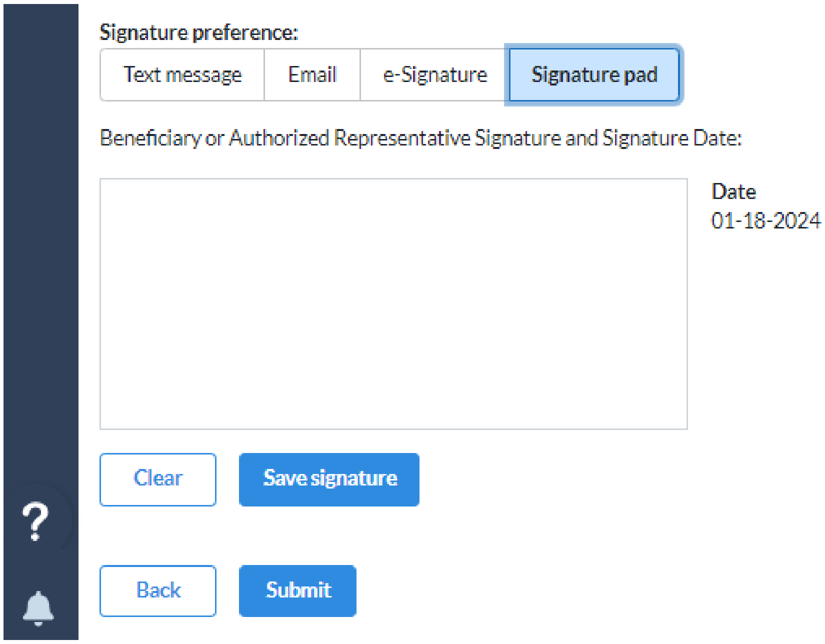




- **e-Signature** - For in-person appointments when the client is present with the agent to sign the enrollment.



- **Signature pad** - For in-person appointments when the client is present with the agent to sign the enrollment.



Notifications

If you opt into notifications in your agent profile, you will receive notifications via text and/or email when a customer:

- **"Scope signed"** - The customer signed the scope that you sent them, and it is ready for you to sign if you have not done so already
- **"Online enrollment"** - Customer completed an app on your purl
- **"eSignature complete"** - Customer signed an app via an e-Signature link
- **"eSignature incomplete"** - You have sent this customer a link to sign, but they have not yet signed and still have time to do so. Remember, e-Signature links expire after 24 hours.
- **"eSignature past due"** - The customer did not sign within 24 hours and their link to do so has expired. They will need a new link to sign sent to them. See our post "How to send a new link to e-Sign"

NOTE: Notifications have an enrollment codes available. You can use the enrollment code to look up the customer if they have information in the system.

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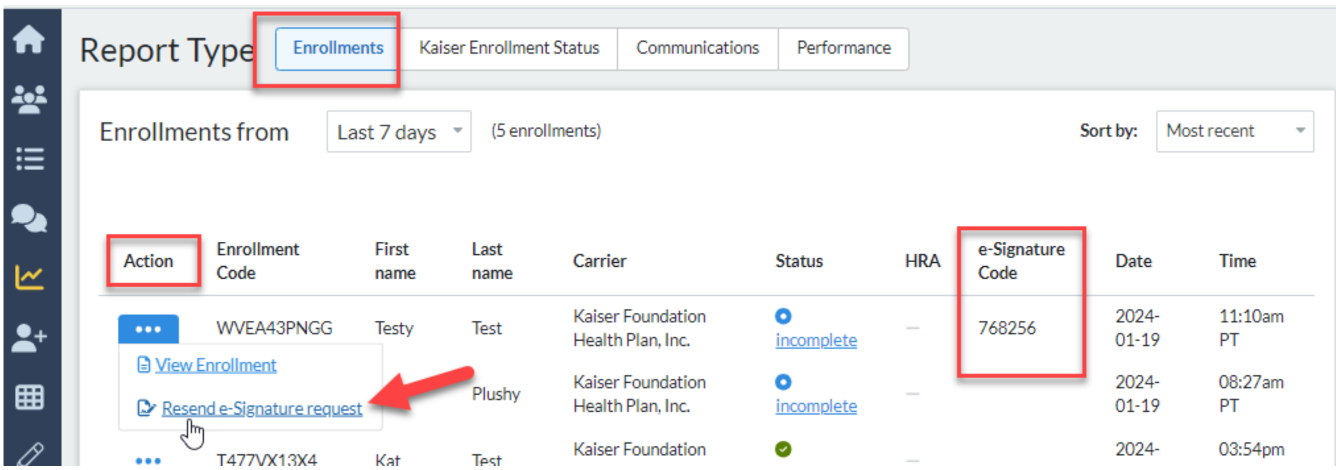
Personal Codes

When sending a client their enrollment form to review and sign via Text or Email, a **personal code** will be generated which you will need to provide to your client separately for them to access the enrollment form or other communication that may include PHI. Also referred to as '**e-Signature Code**', you can look up a personal code for an enrollment sent to a client on the Reports tab, under the Enrollments report. These codes expire within 24 hours of being generated. **Generate a new code** in the Reports => Enrollments tab, by clicking the '…' under the Action column and selecting 'Resend e'Signature request'.



If your client uses your **Personal URL (PURL)** to begin enrollment and needs help, they will see your agent phone number and a **personal code** at the top of the enrollment form pages which they can provide you to assist. If they click on the '?' tool tip, they will see a message stating '*This is a personalized code for your session. The information you have entered for medications, health status and doctors has been saved. If you contact a licensed insurance agent, please provide this code to save time.*' The message box will also provide them a link to re-access their incomplete enrollment form at later time if needed.

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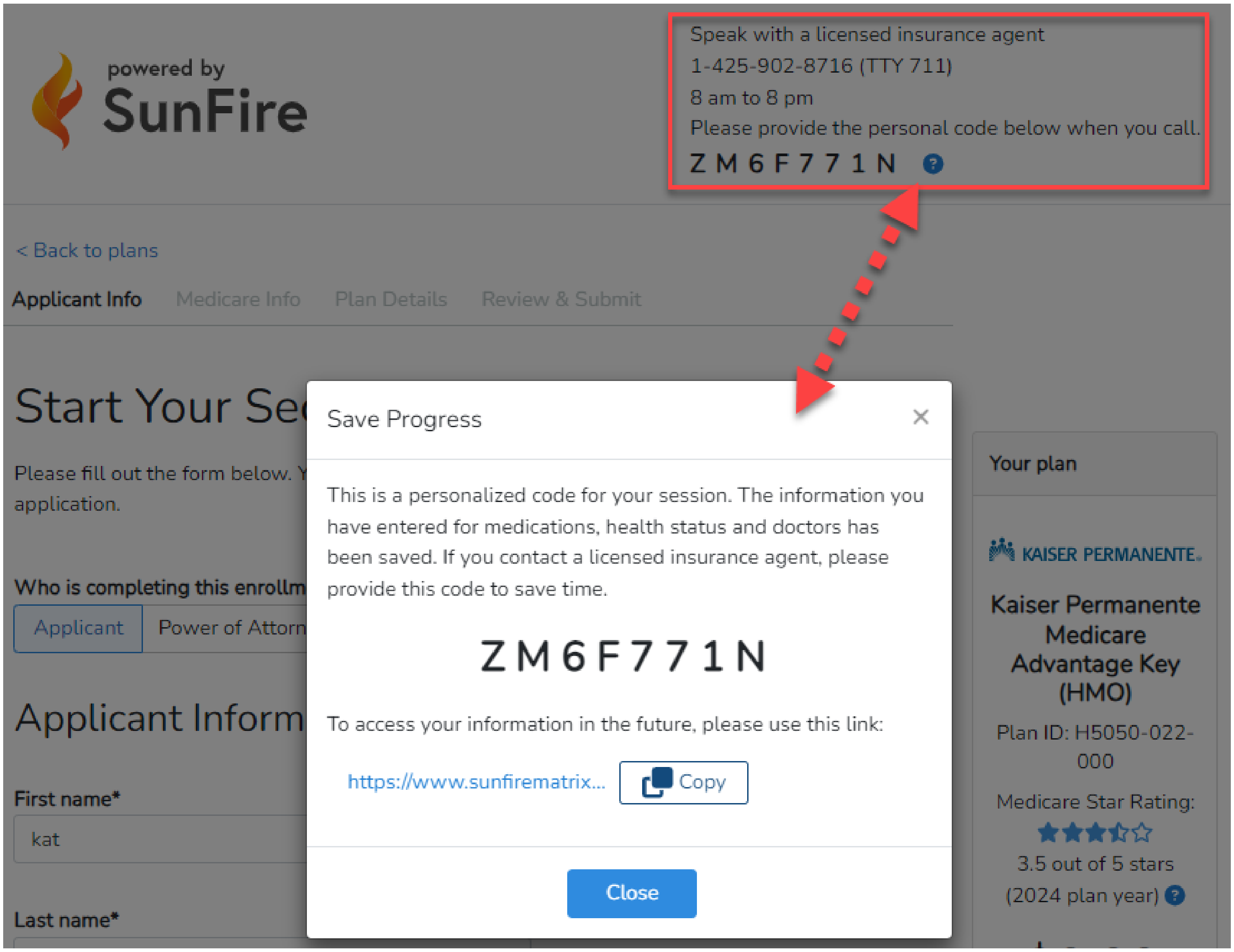
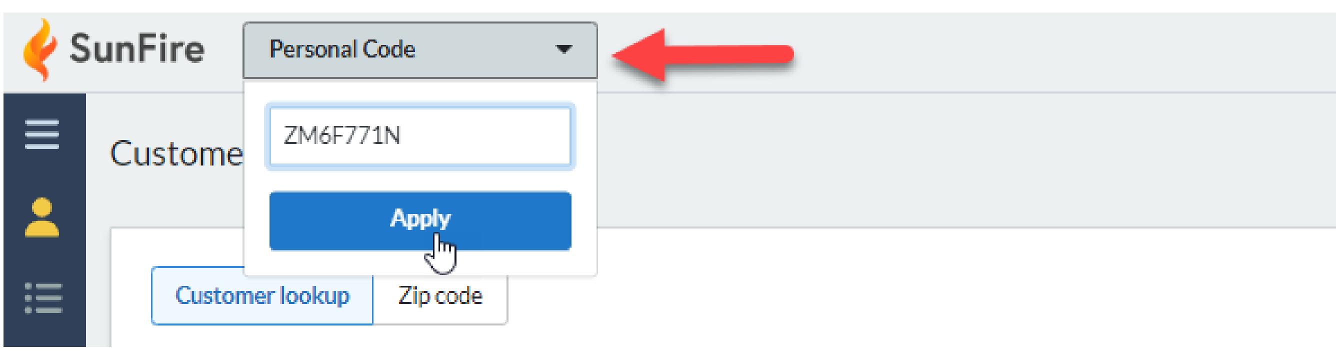
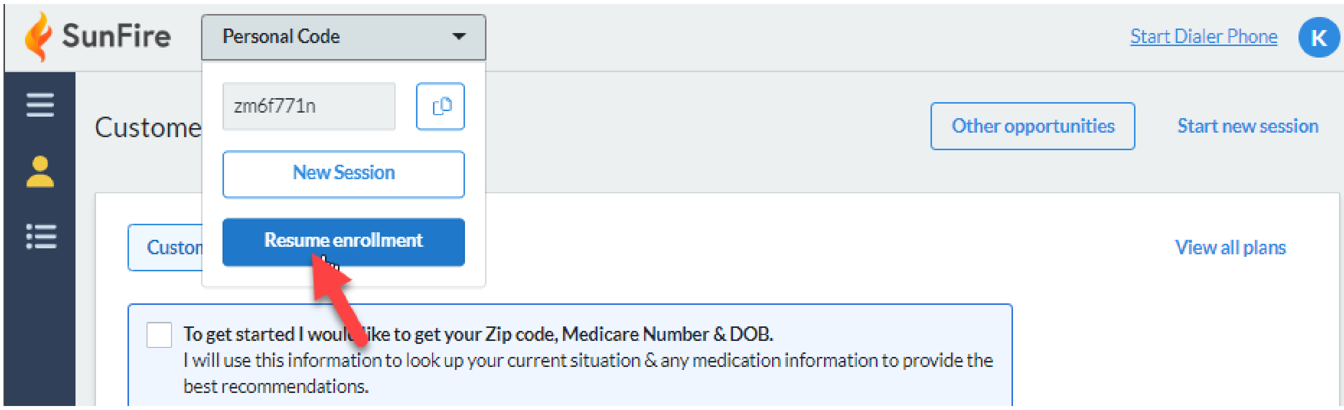


Once your client provides you their personal code, click on the 'Quote & Enroll' tab, once on the Customer Profile page, click on the 'Personal Code' dropdown. Enter the personal code your client provided, click 'Apply'.



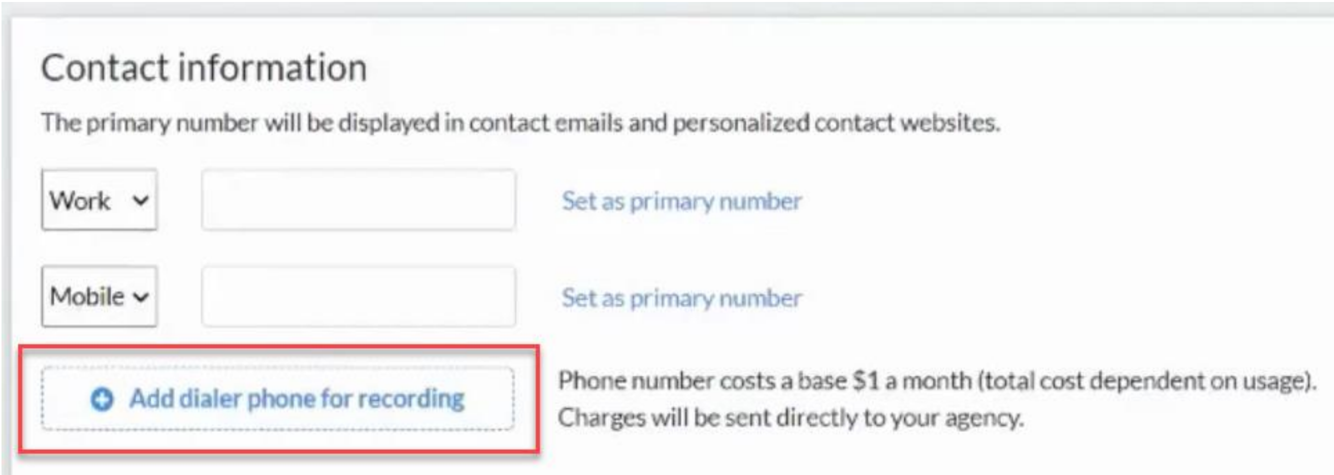
To resume the enrollment your client had started click back on the Personal Code drop down and select 'Resume enrollment'. Once is clicked the agent will be able to view the enrollment form pages with the data the client had previously entered.

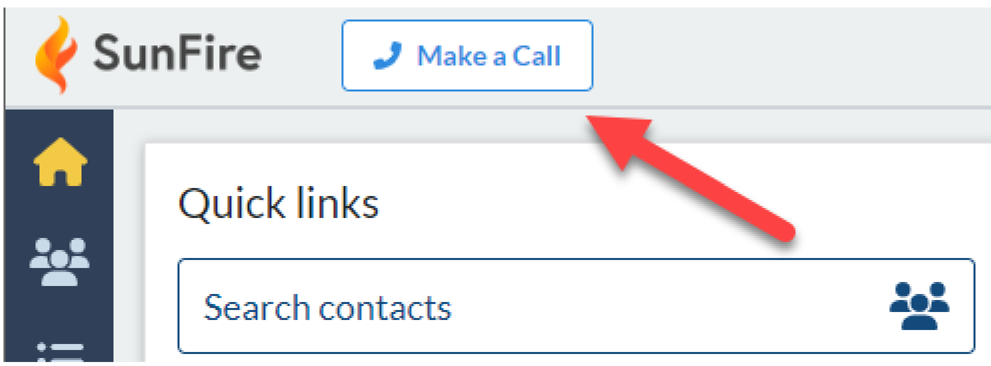


Call Recording

Agents are not approved telephonic enrollment submissions but you do have the option of using the **call recording** functionality for marketing and sales calls to KPWA clients and conducting a voice scope if necessary. There is no cost to the agent to set up your dialer phone through the KPWA Sunfire platform. Note that you will <u>not</u> have access to your Sunfire call recordings. Call recordings can only be accessed by Kaiser Permanente for compliance reviews and audits and will be stored by Sunfire for 10 years per CMS requirements.

To set up your agent dialer number, go to your agent profile and click '**Add dialer phone for recording**' under the Contact information section. Be sure to click 'allow microphone' when prompted. Once your Dialer number is generated, Save Changes and navigate back to your dashboard. When you need to make a recorded call you can use the 'Make a Call' button in the top left corner of your dashboard.





Health Risk Assessments - HRAs

Kaiser Permanente does not require members to complete a Health Risk Assessment and does not incentivize agents to assist their clients in completing one.

Quoting KP Northwest (KPNW - Oregon & SW Washington) Medicare plans for KPNW agents affiliated with Integrity or HealthMarkets FMOs

If you are appointed and ready-to-sell (RTS) Medicare in the Kaiser Permanente Northwest (KPNW) region under either the Integrity or HealthMarkets FMOs, you will continue to quote and sell the KP Northwest region's Medicare plans through your FMOs portal (See KPWA and KPNW Medicare Service Areas for more detail on region and service area differences).

KPNW FMO detail for quoting Kaiser Permanente Northwest Medicare Advantage plans:

- **HealthMarkets (Golden Outlook/We Speak Medicare)** agents appointed in KPNW Region: Kaiser NW Region Sunfire url: https://www.sunfirematrix.com/app/agent/hthmkts
    - Log onto the Sunfire Platform:
    - Agents will need to enter their Usernames and Passwords.
    - Your UserName is your Email, Password will have been set by you.
    - If first time logging into the KPNW Sunfire url password is: X#[npn][first3lastnamelowercase]. For example, If name is Jane Doe and NPN 5327248- X#5327248doe

- **Integrity** agents appointed in KPNW Region:
    - Log onto MedicareCENTER via: https://www.medicarecenter.com/welcome
    - Once logged into MedicareCENTER- go to your dashboard, click on your name
    - Upon clicking on your name, drop down box appears, select MedicareLINK
    - When searching for plan information please select plan type: MAPD, not MA Plans
    - When you enter MAPD Plans, the NW Region KP Products will be available for you to view, quote and submit enrollments
    - If you are unable to view Kaiser products please send an email to the MedicareCENTER help desk: MedicareCENTER@integritymarketing.com , please also cc nw-medicarebrokersupport@kp.org

KPNW Individual Medicare Broker Support

- email: NW-MedicareBrokerSupport@kp.org
- phone: 971-421-0212

KPWA and KPNW Medicare Service Areas – What's the difference?

Kaiser Permanente Washington (KPWA – H5050)) is a separate region and separate Medicare service area from Kaiser Permanente Northwest (KPNW – H9003). These regions have different appointment, commissions, enrollment processes and support teams.

Kaiser Permanente Washington (KPWA) - Medicare Contract # H5050

Medicare Service Area:

- 12 Washington counties - Island, King, Kitsap, Lewis, Pierce, Skagit, Snohomish, Spokane, Thurston, Whatcom and partial counties Grays Harbor and Mason

Support: WA Medicare Sales Producer Support

- email: KPWA.Medicare@kp.org
- phone: 800-581-8252

Kaiser Permanente Northwest (KPNW) - Medicare Contract # H9003

Medicare Service Area:

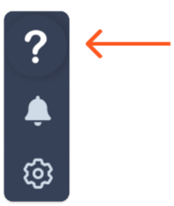
- 10 Oregon counties: Benton, Clackamas, Columbia, Lane, Linn, Marion, Multnomah, Polk, Washington, and Yamhill
- 3 SW Washington counties: Clark, Cowlitz and Wahkiakum

Support: NW Individual Medicare Broker Support

- email: NW-MedicareBrokerSupport@kp.org
- phone: 971-421-0212

KPWA Resources and Support

Check out additional SunFire Training Resources and FAQs accessible from your Sunfire dashboard. In the lower left corner of the screen, you will see a question mark icon. Click this to access our FAQs to learn more about using the SunFire platform.



For help contact the KPWA Medicare Sales Producer Support team at **1-800-581-8252** (Mon-Fri, 8:30-5PM PST) or email us at **kpwa.medicare@kp.org**.

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