SALES SENTINEL

User Guide

GORMAN HEALTH GROUP

User Guide

SALES SENTINEL

- This guide is designed to help you navigate the Sales Sentinel tool and assist you with the completion of Sales Sentinel programs.

- Some of the contents of this manual may not apply, depending on your program's setup and requirements.

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Contents

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Sales Sentinel Basics

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- To return to Sales Sentinel, go to **www.medicaresalessentinel.com**.

- For questions or support while using Sales Sentinel, contact:
    - **Sales Sentinel Support** (please refer to the phone number referenced on the Introduction screen of your sponsor's program); or
    - Email your question to **salestraining@gormanhealthgroup.com**.

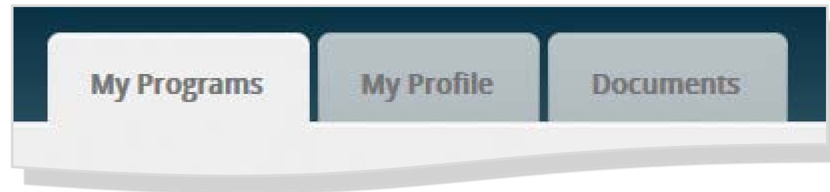
- The Sales Sentinel Support team is available:
  Monday thru Friday, 8:00 AM – 5:00 PM (EST)

- Extended Sales Sentinel Support hours are provided during peak season:
  Monday thru Friday, 8:00 AM – 7:00 PM (EST)

Navigating the Site

SALES SENTINEL

- Use the tabs at the top of the site to navigate the Sales Sentinel tool.



- **My Programs:**
  - Lists programs you are currently registered for. Access and complete program requirements here.
- **My Profile:**
  - Displays demographic information entered during registration.
  - Update your profile by replacing the information you wish to change and clicking “Save”.
- **Documents**:
  - Stores documentation that is uploaded to the Sales Sentinel site while completing programs. Supporting documents can also be uploaded here.

Username and Password

- **Your Sales Sentinel Username and Password are both self-assigned during registration.** Sales Sentinel will automatically default your Username to your Social Security Number however, you may choose a different one.

- **Username Minimum Requirements**:
  - At least 4 alphanumeric characters, or
  - Match your Social Security Number exactly.

- **Password Minimum Requirements:**
  - Eight (8) or more characters,
  - One (1) uppercase letter,
  - One (1) lowercase letter,
  - One (1) number, and
  - One (1) special character (example: @).

- **Forgot Password?**
  - Contact Sales Sentinel Support to have your password reset, or
  - Use the “Forgot Password” feature located on our Sales Sentinel login screen to have a temporary password sent to the email address on file.

Continuing Education

- Gorman Health Group is seeking approval as a Continuing Education (CE) provider in 13 states. CE credits are available for successful completion of **Medicare Basics, Medicare Advantage & Part D Training**.
- **CE is optional and will not be available in all states and programs.**
- CE can only be elected for resident state licenses. **Please make your resident license state selection carefully to ensure timely processing of your CE credits.**
- To receive CE, the following steps are required :
  1. Elect CE on the Sales Sentinel Payment Screen.
  2. Accurately select your resident license state and enter your resident license number.
  3. Remit payment if applicable.
  4. Successfully complete all course material and final exam testing.
  5. Complete and submit the CE Proctor Form if required by your resident license state.
- ****IMPORTANT PROCTOR NOTIFICATION****
  If you hold your resident license in Alabama, Arkansas, Connecticut, Georgia, Michigan, Missouri, Nebraska, Pennsylvania, South Carolina, Vermont, or West Virginia, you are required to complete the Final Exam in the presence of a "disinterested 3rd party" proctor and complete the Continuing Education Proctor Form provided by Gorman Health Group (GHG). A disinterested 3rd party is defined as "a person not related to the examinee, an immediate supervisor or employee of the examinee, and not concerned, with respect to possible gain or loss, in the result of a pending course final examination". Failure to comply with the proctoring requirement may result in disciplinary action against your license. GHG will not submit CE credits to your resident license state without a completed proctor form.
- The **Continuing Education Proctor Form** can be found on the **"Continuing Education Election and Proctor Notification"** form within your Sales Sentinel program. Follow the instructions located at the bottom of the form for submitting.

Program Registration: New Users

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- To access registration for a program, you must use the unique registration link specific to the program you wish to complete. Registration links are typically distributed by the program sponsor via email invitation.

1. Click on the unique registration link provided which will direct you to the Sales Sentinel login screen.
2. Click on “Don’t have an account? Click here to Register”.
3. Enter your Social Security Number when prompted and click “Next”.
4. Complete the Registration Form by entering the requested information in the fields provided. First-time users must complete all required fields marked with an asterisk (*).
5. Click “Save & Cont.” after completing the form to proceed automatically to your first program step.

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Program Registration: Existing Users

- To access registration for a program, you must use the unique registration link specific to the program you wish to complete. Registration links are typically distributed by the program sponsor via email invitation.

1. Click on the unique registration link provided which will direct you to the Sales Sentinel login screen.
2. Login using your existing Sales Sentinel Username and Password.
3. Demographic information will pre-populate on the Registration Form for returning users; verify the information and make updates where needed.
4. Verify your email address by re-typing it in the “Verify Email Address” field provided.
5. Click “Save & Cont.” after completing the form to proceed automatically to your first program step.

Program Basics

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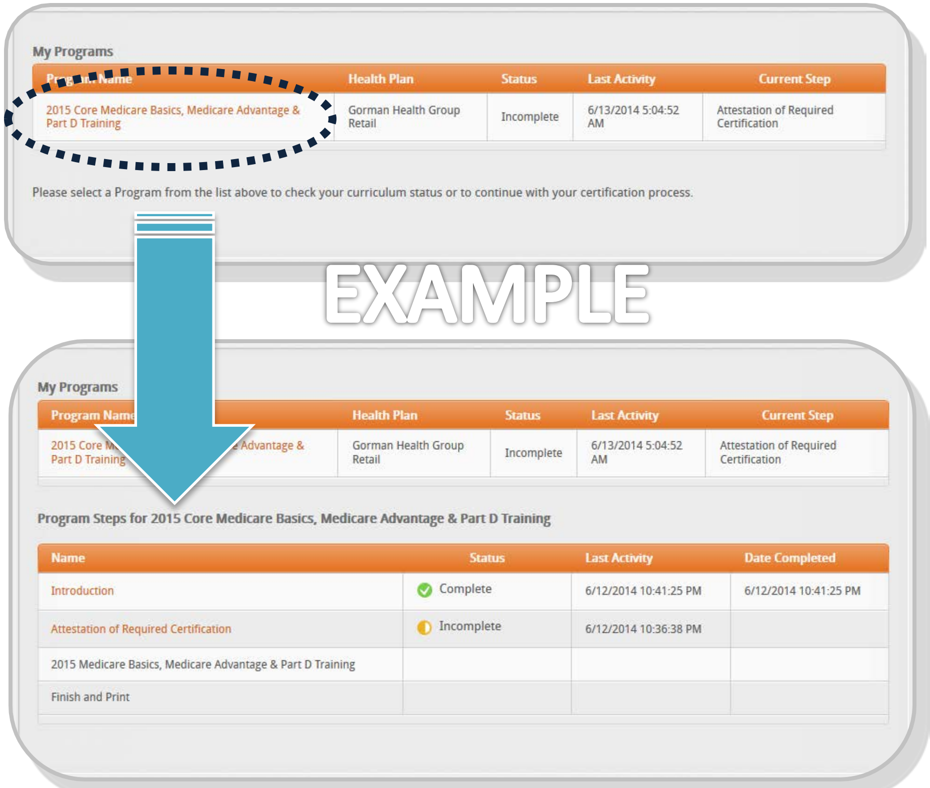
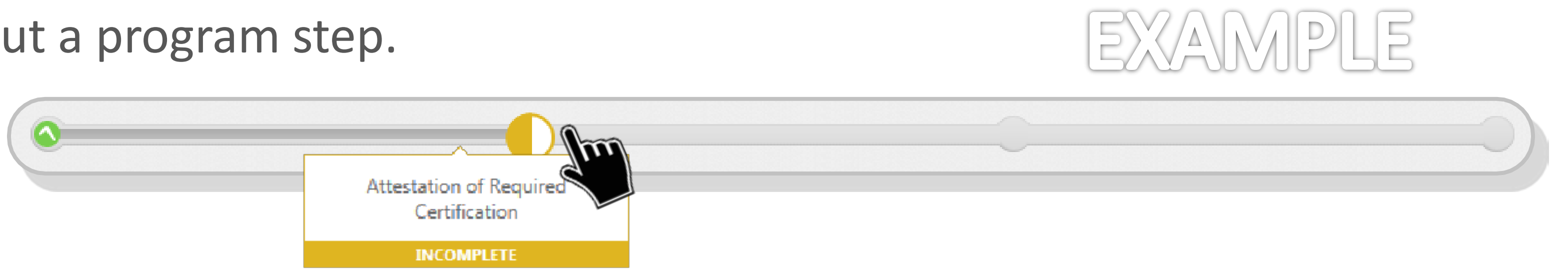
- The “My Programs” tab will show all programs you are currently registered for in the Sales Sentinel system.
- You can return to the main “My Programs” page at any time by clicking on the tab at the top of your screen.
- **To open a program**, click on the Program Name displayed in orange font; this will populate the program steps below. (illustrated)
- **To access a program step**, click on the title displayed in orange font under “Name”; this will open the step for you to complete.
- Sales Sentinel will automatically progress through your program as each step is completed. To continue to the next screen, select one of the following options on each page:
    - o “Save & Cont.” (saves the associated program step and automatically progresses to the next)
    - o “Save for Later” (saves the associated program step and returns you to the My Programs screen to continue at a later time)
    - o “Next Step” (directs you to the next step in the program)



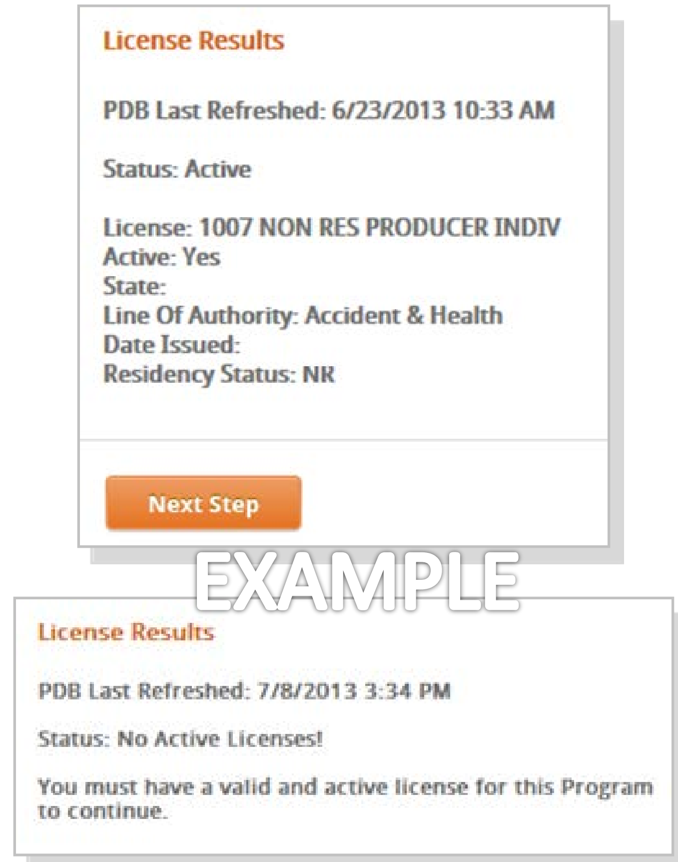
Progress and Status Tracking

- Status Indicators are displayed throughout Sales Sentinel to track completion of individual requirements.
  - Indicates the program step is Complete
  - Indicates the program step is Conditional Complete
  - Indicates the program step is Incomplete
  - Indicates Pending Transaction
- You can track your completion within a program using the progress bar displayed across the top of your screen when a program is active.
- Hover your mouse over a status indicator on the progress bar to display details about a program step.



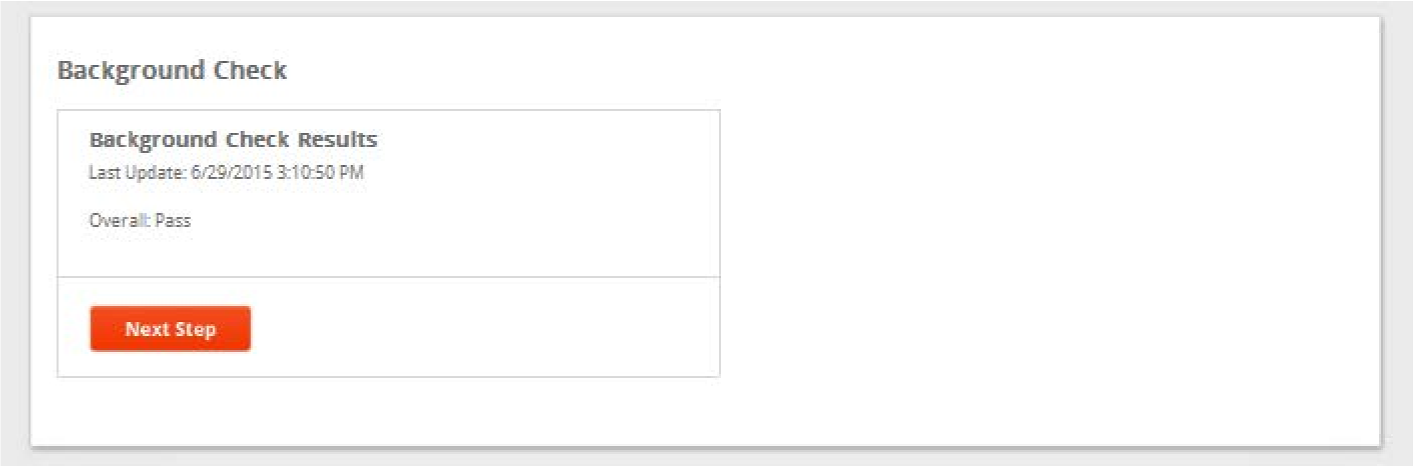
License Verification

- Depending on program setup, automated license verification may be required to ensure you hold an active license with a valid line of authority (LOA) in the state(s) you wish to market products for the associated sponsor. The state(s) will be selected in a prior program step.
- Successful verification of licensure is required before you will be able to continue to the next step of your program.
- Once licensure has been successfully verified, click "Next Step" to continue with your program.
- If you do not hold a valid, active license for the state(s) you selected, please exit the program and return once you have obtained the appropriate licensure.



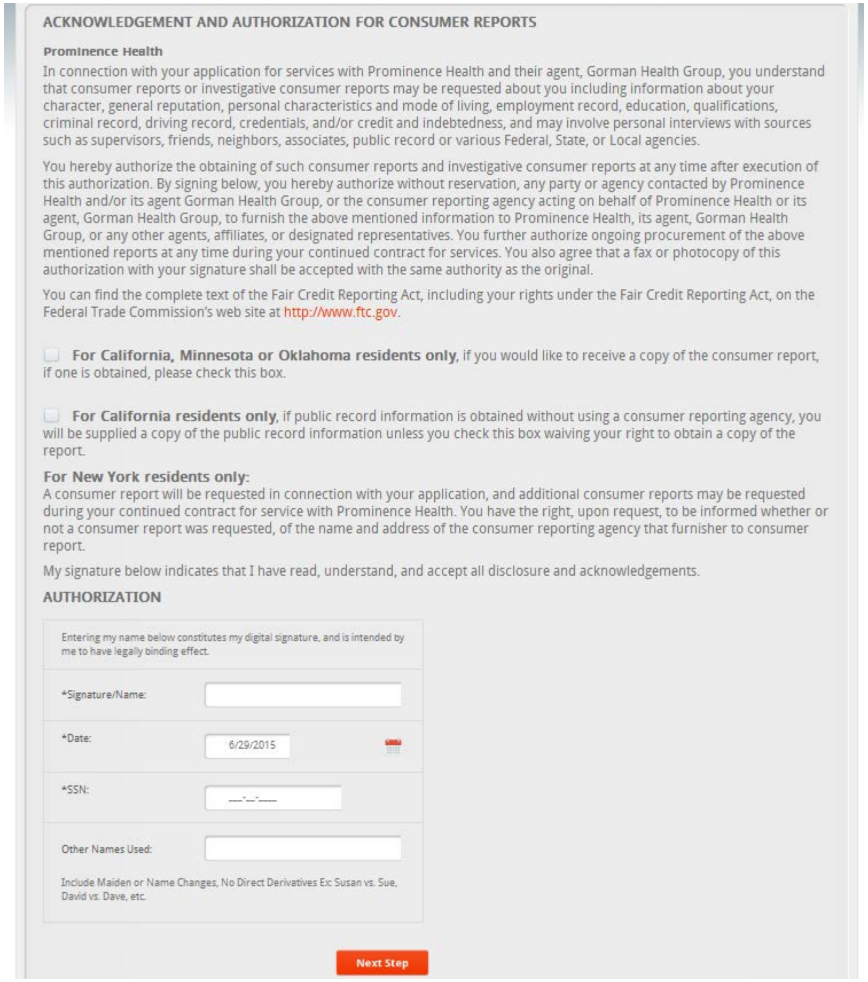
Background Check

- If your program requires a background check it will be automatically processed once you complete and submit the Acknowledgement and Authorization for Consumer Reports.
- Click “Next Step” to proceed.
- Background checks may take 3-5 business days to be returned.
- If your background check has an overall status of Pending, check back later to see if it has gone through.



Background Check Authorization

- If your program requires a background check, you will be presented with the Acknowledgement and Authorization for Consumer Reports.
- Please review the document in it's entirety, check the boxes (as appropriate), and provide your authorization by completing the document.
- Click "Next Step" to proceed.



ACKNOWLEDGEMENT AND AUTHORIZATION FOR CONSUMER REPORTS

Prominence Health

In connection with your application for services with Prominence Health and their agent, Gorman Health Group, you understand that consumer reports or investigative consumer reports may be requested about you including information about your character, general reputation, personal characteristics and mode of living, employment record, education, qualifications, criminal record, driving record, credentials, and/or credit and indebtedness, and may involve personal interviews with sources such as supervisors, friends, neighbors, associates, public record or various Federal, State, or Local agencies.

You hereby authorize the obtaining of such consumer reports and investigative consumer reports at any time after execution of this authorization. By signing below, you hereby authorize without reservation, any party or agency contacted by Prominence Health and/or its agent Gorman Health Group, or the consumer reporting agency acting on behalf of Prominence Health or its agent, Gorman Health Group, to furnish the above mentioned information to Prominence Health, its agent, Gorman Health Group, or any other agents, affiliates, or designated representatives. You further authorize ongoing procurement of the above mentioned reports at any time during your continued contract for services. You also agree that a fax or photocopy of this authorization with your signature shall be accepted with the same authority as the original.

You can find the complete text of the Fair Credit Reporting Act, including your rights under the Fair Credit Reporting Act, on the Federal Trade Commission's web site at http://www.ftc.gov.

☐ **For California, Minnesota or Oklahoma residents only**, if you would like to receive a copy of the consumer report, if one is obtained, please check this box.

☐ **For California residents only**, if public record information is obtained without using a consumer reporting agency, you will be supplied a copy of the public record information unless you check this box waiving your right to obtain a copy of the report.

For New York residents only:
A consumer report will be requested in connection with your application, and additional consumer reports may be requested during your continued contract for service with Prominence Health. You have the right, upon request, to be informed whether or not a consumer report was requested, of the name and address of the consumer reporting agency that furnisher to consumer report.

My signature below indicates that I have read, understand, and accept all disclosure and acknowledgements.

AUTHORIZATION

Entering my name below constitutes my digital signature, and is intended by me to have legally binding effect.

*Signature/Name:

*Date: 6/29/2015

*SSN: ___-__-____

Other Names Used:

Include Maiden or Name Changes, No Direct Derivatives Ex: Susan vs. Sue, David vs. Dave, etc.

Next Step

Appointments & Writing Codes

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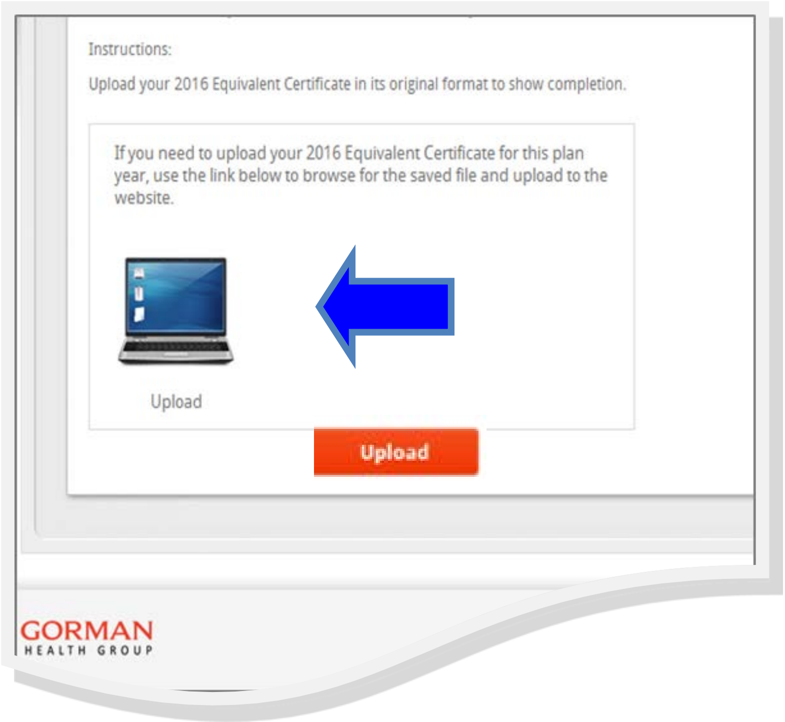
- **Appointments (if applicable)** will be automatically processed through your program once you have completed all other required steps in your program.

- **Writing Codes** may be issued if your program requires, and if so, they will appear at the bottom of your *"My Programs"* tab.

Uploading Documents

- Various documents may be requested by your sponsor as part of your program requirements. Follow the steps below to upload documents to Sales Sentinel.
- Not all upload steps are required. If you do not have the requested document and the program step is optional, click "Next Step" to proceed.
- If a document needs your Plans approval prior to proceeding, you will receive an email upon approval to log back in and proceed to complete the step.

- **Uploading Documents:**
  - Click the "Upload" icon 
  - Click "Browse" to locate the file on your computer
  - Click "Upload" to finalize the transmission



E & O Upload

- An E & O (Errors & Omissions or Errors & Omissions Declaration Page) may be requested if your program requires it. Follow the steps below to upload your E&O to Sales Sentinel, if applicable.
- Please note that the only acceptable document for this step is to upload a copy of your official E&O Declaration page from the E&O policy issues by your insurance carrier.

- **Uploading Documents:**
  - Click the “Upload” icon
  - Click “Browse” to locate the file on your computer
  - Click “Upload” to finalize the transmission
  - Click “Next Step” to proceed.

Summary and Print

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- Summary and Print will become available once all program requirements have been completed. This is the final step of all programs and allows you to print or save a comprehensive record of all items completed within a program.

- To print the information included in Summary and Print, click on the printer icon at the top right of the screen. (illustrated)

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Training Basics

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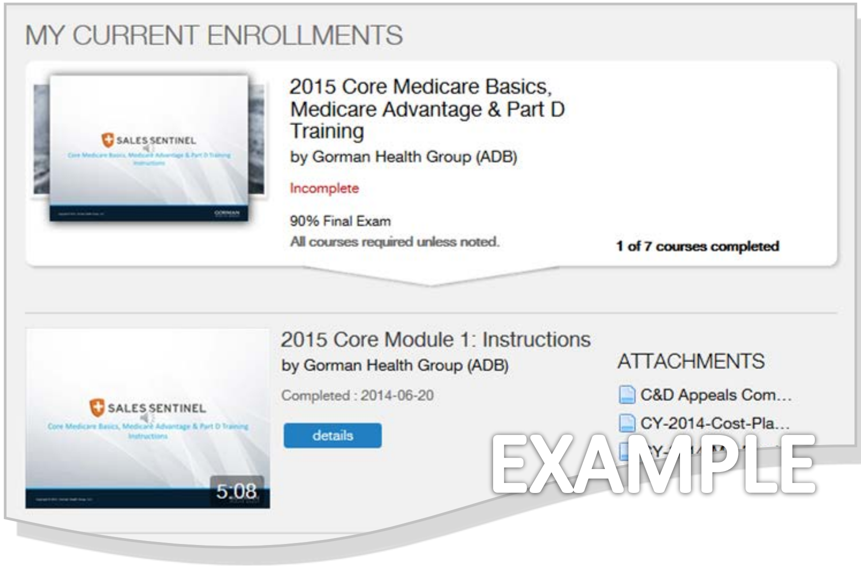
- Your Learning Locker is where all of your training materials are located and completed.
- Training materials are presented in the following manner:
  - o Curriculums are composed of training modules and final exams. More than one curriculum may be required as part of your training /certification. Each curriculum will have pre-determined completion criteria guidelines that are set by the program sponsor.
  - o Modules, sometimes referred to as courses, are your individual training lessons. Modules typically have pre-requisite requirements and must be completed in the order they are presented. If you select a module that has an outstanding pre-requisite requirement, a notification will display alerting you of what must be completed before you will be allowed to advance.



- Completion criteria is the amount of material within each course that must be viewed and/or the amount of audio that must be played. These criteria can be found by clicking on the “Details” button displayed next to modules.
- **It is important to click “Next Step” once you have completed all trainings in your Learning Locker to move to the next program requirement. Otherwise, your program may remain incomplete.**

Online Payment Transactions

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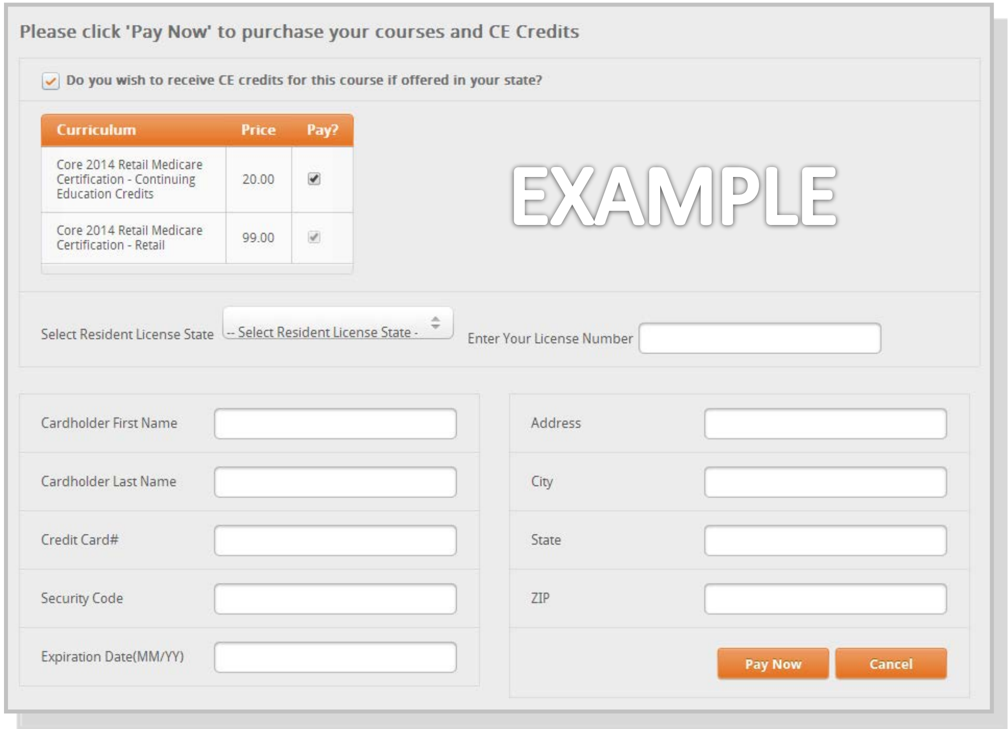
- Payments for training fees and continuing education (CE) credits must be submitted via online credit card transaction through the Sales Sentinel payment screen which will automatically populate prior to accessing training materials.

- If required, enter the following information on the payment screen and click “Pay Now” to submit your payment:
    - Cardholder First Name
    - Cardholder Last Name
    - Credit Card Number
    - Credit Card Security (CSV) Code
    - Credit Card Expiration Date
    - Billing Address, City, State, and Zip

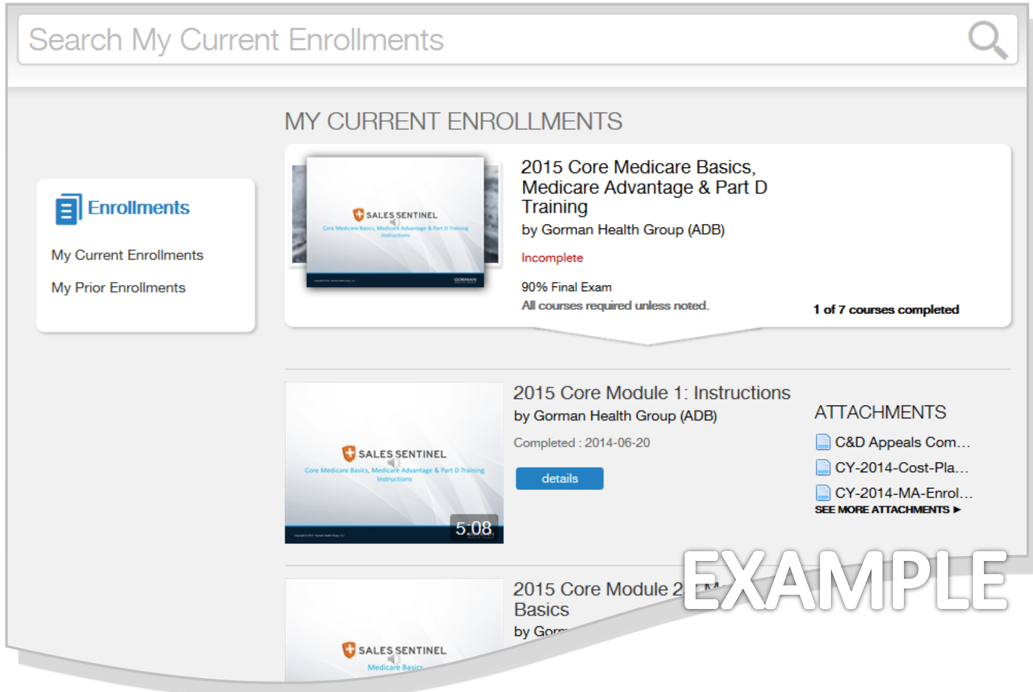


Learning Locker 101

- **My Current Enrollments** houses all training awaiting completion.

- **My Prior Enrollments** houses all completed training. Once you have successfully completed a curriculum it will move from My Current Enrollments to My Prior Enrollments. Depending on program setup, Certificates of Completion can also be found in My Prior Enrollments if available.

- If applicable, **Attachments** are documents intended to supplement module trainings. Click on the title of a document to download as a PDF.



- **Details** will list detailed information about a training module. From the details screen you can view completion criteria, number of slides included, and available attachments for a module as well as replay a training if it was previously completed.

- **View Courses** will expand a curriculum to show the required training modules.

Navigating the Training Window

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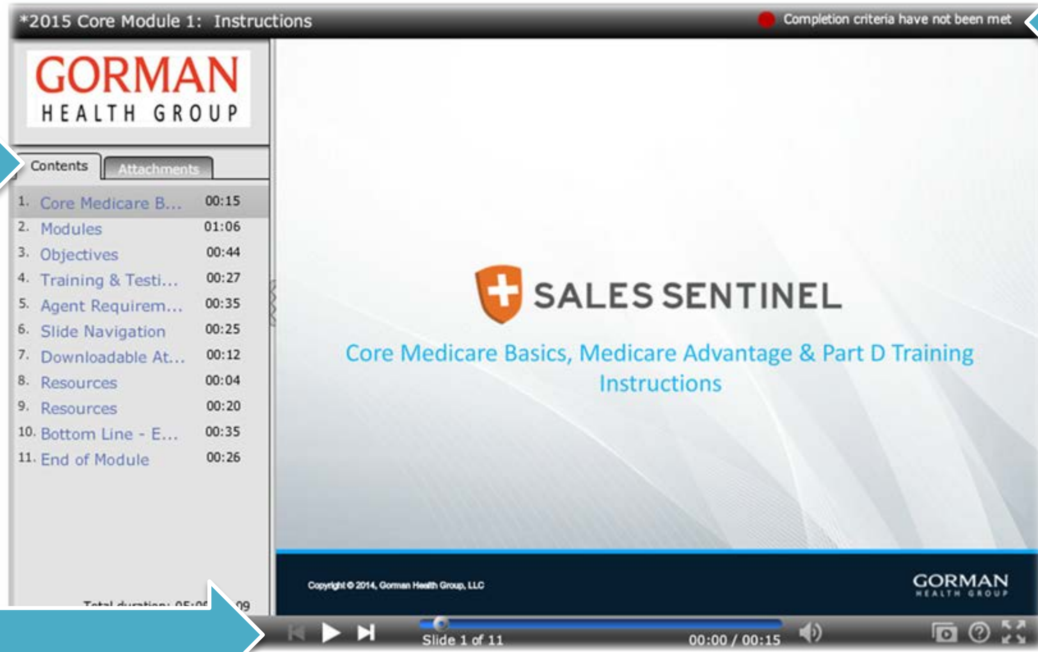
The **Contents** tab lists all slides included in the training presentation as well as the length of recorded voiceover. The **Attachments** tab lists all supplemental training documents available for download.

The **Completion Criteria Indicator** indicates whether the minimum completion criteria has / has not been met.



(L – R)
My Viewing History shows previously completed trainings. **Tools and Help** allows access to FAQ, Slide Notes, and online Brainshark Support. **Maximize Screen** expands the training window to full screen.

Navigational Buttons can be used to control the advancement of the training slides.

Opening Modules and Final Exams

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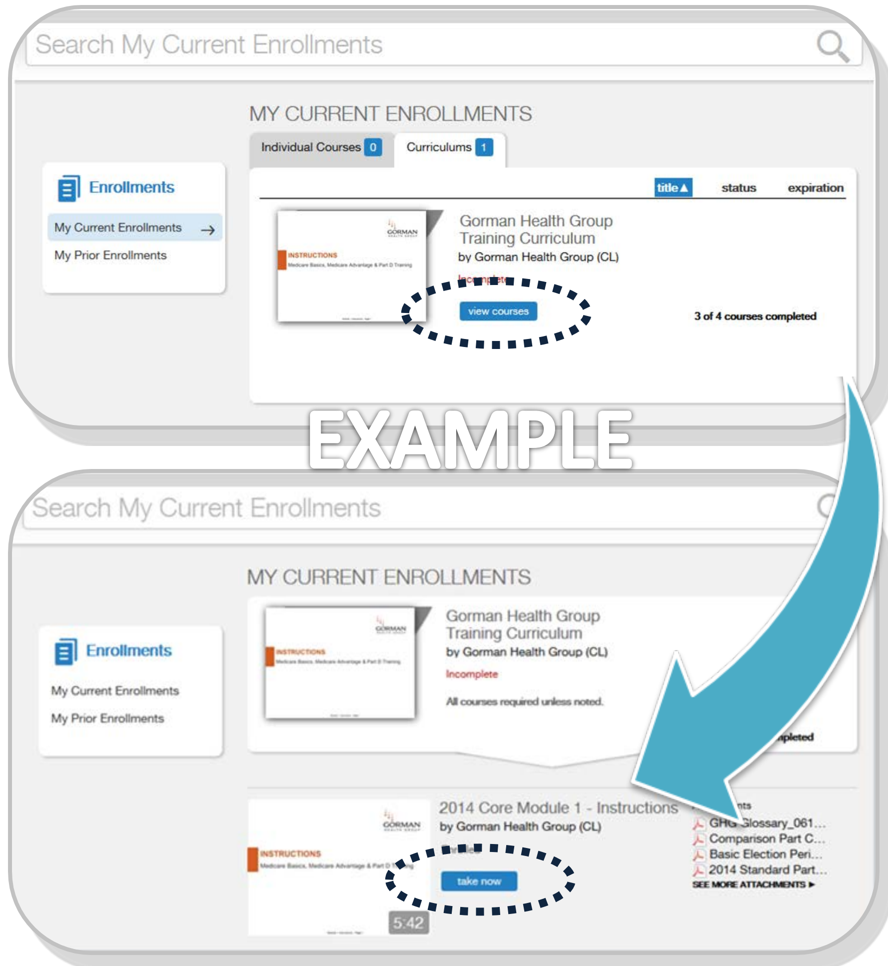
- Open a Curriculum to view the contents by clicking on “View Courses” under the Curriculums tab in My Current Enrollments. This will reveal all modules and final exams contained in the curriculum.

- To open a Module or Final Exam, then click on “Take Now” displayed next to the course preview. Once you have clicked on “Take Now”, your selection will open in a separate training window and begin playing.



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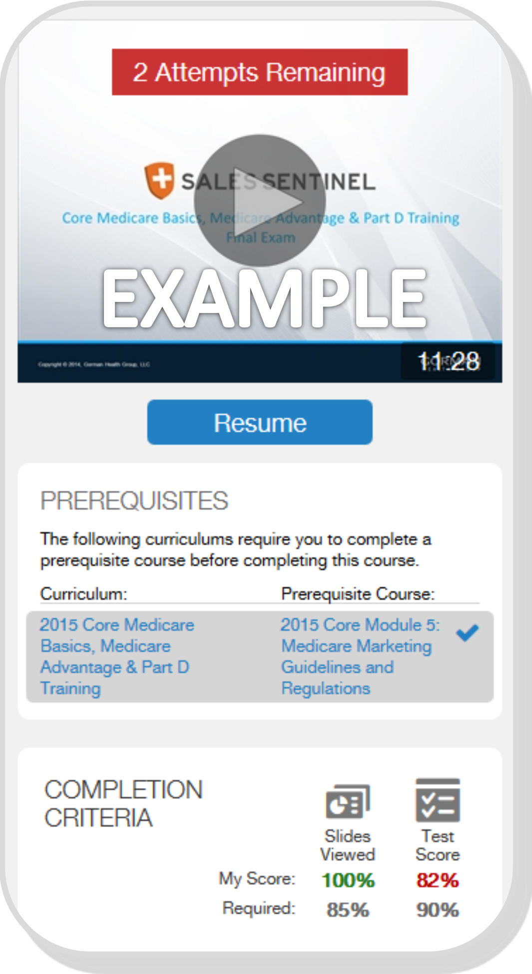
Final Exams

- Final Exams may be required as part of a curriculum and are limited to a pre-determined number of attempts set by the program sponsor. The number of attempts permitted can be found displayed in a red banner across the front of the final exam slide preview in the Learning Locker.
- Final Exams are cumulative, covering content related to all modules within a curriculum. Should you need to, you will be able to review training materials prior to beginning an exam.
- Benchmarks for passing vary by program sponsor however, most will require a minimum score of 85%.
- Once you begin an exam, you must complete it in its entirety before closing the exam window. Closing an exam before completing may result in a failing score and the loss of an attempt.
- Your score will be provided to you upon completion and your results will be transferred to your program sponsor.



Certificates of Completion

- Typically you will be able to print a Certificate of Completion for each completed curriculum however, this option will vary by program.
- Depending on program setup, Certificates of Completion will be found in one of two possible locations in Sales Sentinel:
  - In “My Prior Enrollments” of the Learning Locker, or
  - On the “Summary & Print” document at the end of a program.

Frequently Asked Questions

FAQ	User Guide
Q: What is my Username / Password?	**6**
A: Your Username will default during registration as a first time user to your Social Security Number. You may update your username on the program registration page or on the "My Profile" tab once logged in to Sales Sentinel. Your Password is self-assigned during registration. You may update your password on the "My Profile" tab once logged in to the system. All passwords must meet the following minimum criteria: - Eight (8) or more characters, - One (1) capital letter, - One (1) lowercase letter, - One (1) number, and - One (1) special character (example: @).	
Q: How do I send my certificate / document to Sales Sentinel?	**16**
A: If a specific document is required by your program, please transfer the document using the associated program step in Sales Sentinel. Instructions for uploading a document can be found on page 16 of this User Guide.	

Frequently Asked Questions

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FAQ	User Guide
Q: I can't get to my exam. What's going on?	**11, 21, 22**
A: Training modules typically have pre-requisite requirements and must be completed in the order they are presented. If you believe you have reviewed all of the required training material, take a look at the Completion Criteria Indicator that appears at the top right corner of your training window. If the indicator is red, the minimum required criteria have not been met and you will need to complete the training before you will be allowed to proceed to the final exam. If the indicator is green, close the training window using the "x" at the top right corner of your training window to return to the curriculum overview page where you will be able to open your final exam.	
Q: How do I print my certificate?	**21**
A: Depending on program setup, Certificates of Completion will be found in one of two possible locations in Sales Sentinel: - In "My Prior Enrollments" of the Learning Locker, or - On the "Summary & Print" document at the end of a program. Once you have determined the location of your certificate, click on "Get Certificate" or "Print Certificate" to download and print your document. You can also save the document to your computer instead of printing, if you wish.	

Frequently Asked Questions

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FAQ	User Guide
Q: I'm trying to view my training and I'm getting the error message "We are currently having difficulty accessing the functionality you requested. Please try again later."	
A: Use the following link to test your system for compatibility and ensure your system meets the minimum requirements needed to view a Brainshark On-Demand presentation: - http://www.brainshark.com/systemcheck/SystemCheck.asp **Supported Browsers:** - Internet Explorer 8 or higher - Firefox (latest version) - Safari (latest version) - Chrome (latest version) **Flash Player:** - Adobe Flash version 9 or higher **Bandwith:** - 56kbps for standard presentations - 100kbps for presentations that include Video Slides	
Q: I've already completed the training. How can I review what I've already completed?	**21**
A: Complete trainings will move to "My Prior Enrollments" in your Learning Locker. You may review completed training materials as often as you'd like.	

Frequently Asked Questions

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FAQ	User Guide
Q: I think I've completed everything. How can I tell if my program is complete?	**10, 11, 18**
A: Status indicators can be found throughout your program showing the status of individual program requirements and your overall program completion. Please refer to these status indicators to identify whether your program is complete or incomplete. Your overall program status can be found on the "Home Screen" or main "My Programs" tab under the "Status" column and will reflect on the Summary and Print page. *Please be aware that while a step for CE proctor form upload may show as **Complete**, it may not be if you are in a State that requires a Proctor Form, but you haven't yet uploaded your form (step will show as Complete when it really is not). Reference page 7 (CE Slide) of this User Guide for more information about requirements for proctoring States and be sure to submit a Proctor Form if required.*	
Q: Why am I being asked to pay for this training?	
A: Depending on your sponsor and program set-up, you may be required to pay for your training course(s) either in part or in whole. If you do not believe you should have to pay for your training course(s), please double check to ensure you have registered for the correct program. Often times users have registered for the incorrect program and don't realize this until they have reached a payment screen. If you have registered for the correct program but still do not believe you should have to pay for your training course(s), please contact the appropriate customer service number for further assistance.	

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Frequently Asked Questions

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FAQ	User Guide
Q: Can I get Continuing Education (CE) credit for my training?	**7**
A: Gorman Health Group is seeking approval in over 13 states. CE credits are available for successful completion of **Medicare Basics, Medicare Advantage & Part D Training** when you have elected and paid for CE credits within your Program. Credit can only be applied to your resident license state. A list of the approved states will appear on the payment screen within your program. Please note that you may or may not be able to receive CE depending on your program and resident license state. If your State requires a Proctor form, you must submit that within 3 days of the exam in order for your CE to be processed with the State.	
Q: How much time do I have to complete the exam?	**24**
A: Exams are not timed. The times referenced next to individual courses and exams are narration times and simply reflect the amount of audio that exists within a presentation. Please take your time completing your exam but be aware of the following: - Sales Sentinel will time out after 20 minutes of inactivity. - If you have left your exam open for longer than 20 minutes but your exam still appears on your screen, please note that completion results WILL NOT be recorded after 20 minutes of inactivity. - It is important that once you begin your exam you complete it in entirety within a single session or else you may lose an attempt at successfully completing the exam.	

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Frequently Asked Questions

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FAQ	User Guide
Q: What do I do if I am trying to register and see an error message stating this program is restricted?	
A: Please contact your sponsor for further instruction.	

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T Call the Sales Sentinel Support Line (Phone Number displayed at top of Sentinel program)

E salestraining@gormanhealthgroup.com

Gorman Health Group, LLC (GHG) is a leading consulting and software solutions firm specializing in government health programs, including Medicare managed care, Medicaid and Health Insurance Exchange opportunities. For nearly 20 years, our unparalleled teams of subject-matter experts, former health plan executives and seasoned health care regulators have been providing strategic, operational, financial, and clinical services to the industry, across a full spectrum of business needs. Further, our software solutions have continued to place efficient and compliant operations within our client’s reach.

GHG offers software to solve problems not addressed by enterprise systems. Our Valencia™ software reconciles the capitation payment of more than six million Medicare beneficiaries and continues to support customers participating in the Health Insurance Exchanges. Nearly 3,000 compliance professionals use the Online Monitoring Tool™ (OMT), our complete Medicare Advantage and Part D compliance toolkit, while more than 45,000 brokers and sales agents are certified and credentialed using Sales Sentinel™. In addition, hundreds of health care professionals are trained each year using Gorman University™ training courses.

We are your partner in **government-sponsored health programs**