



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



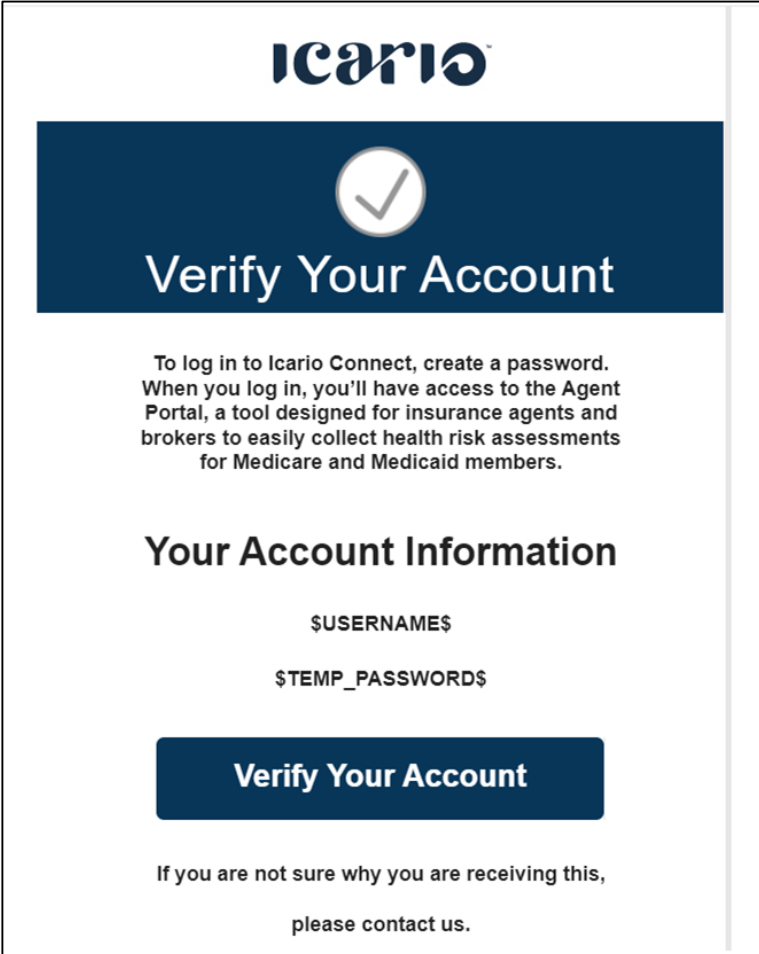


Creating an Account

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



The image shows a mockup of an email invitation from Icario. At the top is the Icario logo. Below it is a dark blue banner with a white checkmark icon and the text 'Verify Your Account'. The main body of the email contains instructions: 'To log in to Icario Connect, create a password. When you log in, you'll have access to the Agent Portal, a tool designed for insurance agents and brokers to easily collect health risk assessments for Medicare and Medicaid members.' Below this is a section titled 'Your Account Information' which displays two lines of placeholder text: '\$USERNAME\$' and '\$TEMP_PASSWORD\$'. A dark blue button with the text 'Verify Your Account' is positioned below the placeholder text. At the bottom, there is a line of text: 'If you are not sure why you are receiving this, please contact us.'

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Verify Your Account

To log in to Icario Connect, create a password. When you log in, you'll have access to the Agent Portal, a tool designed for insurance agents and brokers to easily collect health risk assessments for Medicare and Medicaid members.

Your Account Information

\$USERNAME\$

\$TEMP_PASSWORD\$

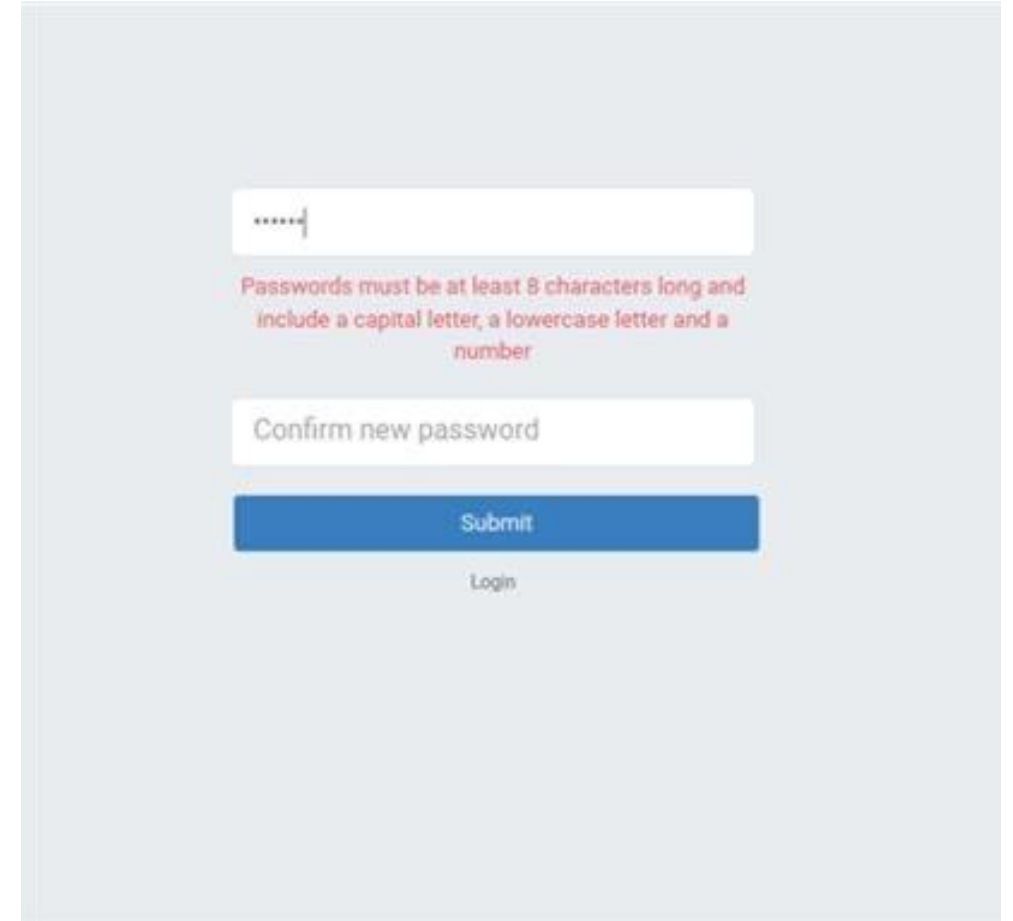
Verify Your Account

If you are not sure why you are receiving this,
please contact us.

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)



A screenshot of a web form for creating a password. The form is set against a light blue background. It features two white input fields. The top field contains a password represented by dots. Below this field, a red error message states: "Passwords must be at least 8 characters long and include a capital letter, a lowercase letter and a number". The bottom field is labeled "Confirm new password". Below the input fields is a blue "Submit" button. At the very bottom of the form area, there is a "Login" link.



Agent Portal Demo



Signing into Agent Portal

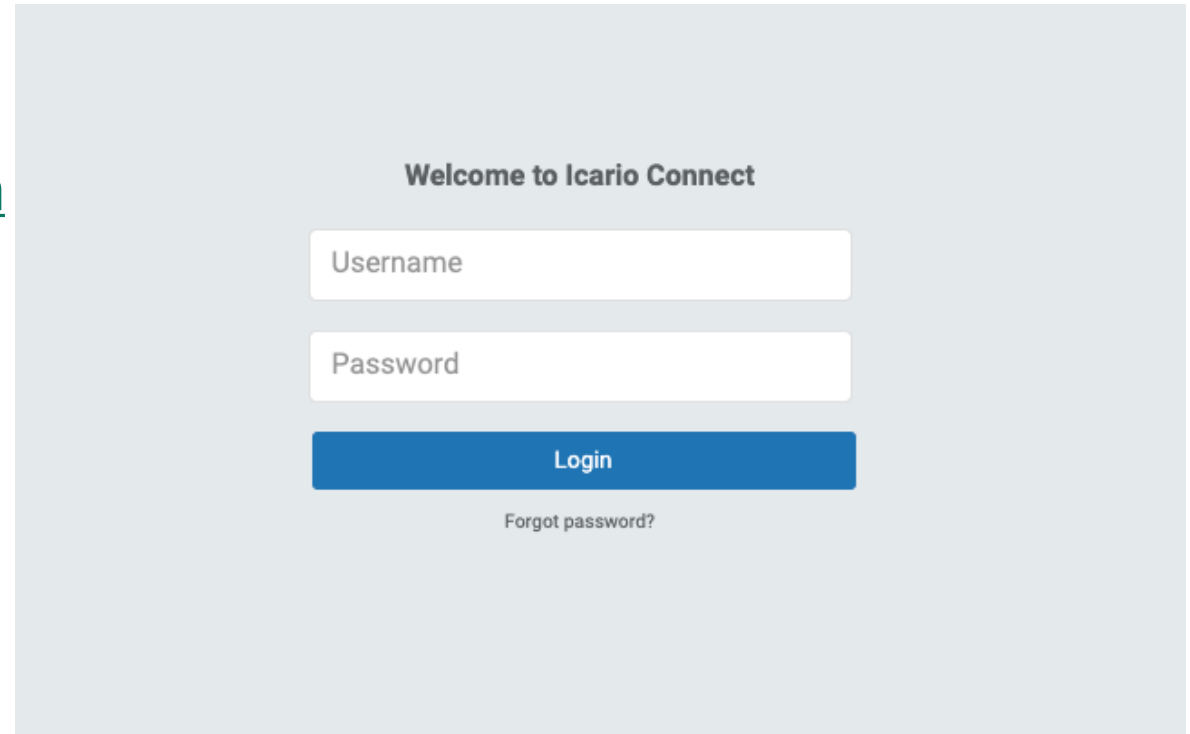
SIGNING IN: ICARIO CONNECT

Login Page:

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

Username:

- Enter your email address.

A screenshot of the Icario Connect login page. The page has a light gray background. At the top, it says "Welcome to Icario Connect". Below this, there are two white input fields with rounded corners. The first field is labeled "Username" and the second is labeled "Password". Below the password field is a blue button with the word "Login" in white. At the bottom, there is a link that says "Forgot password?".

Welcome to Icario Connect

Username

Password

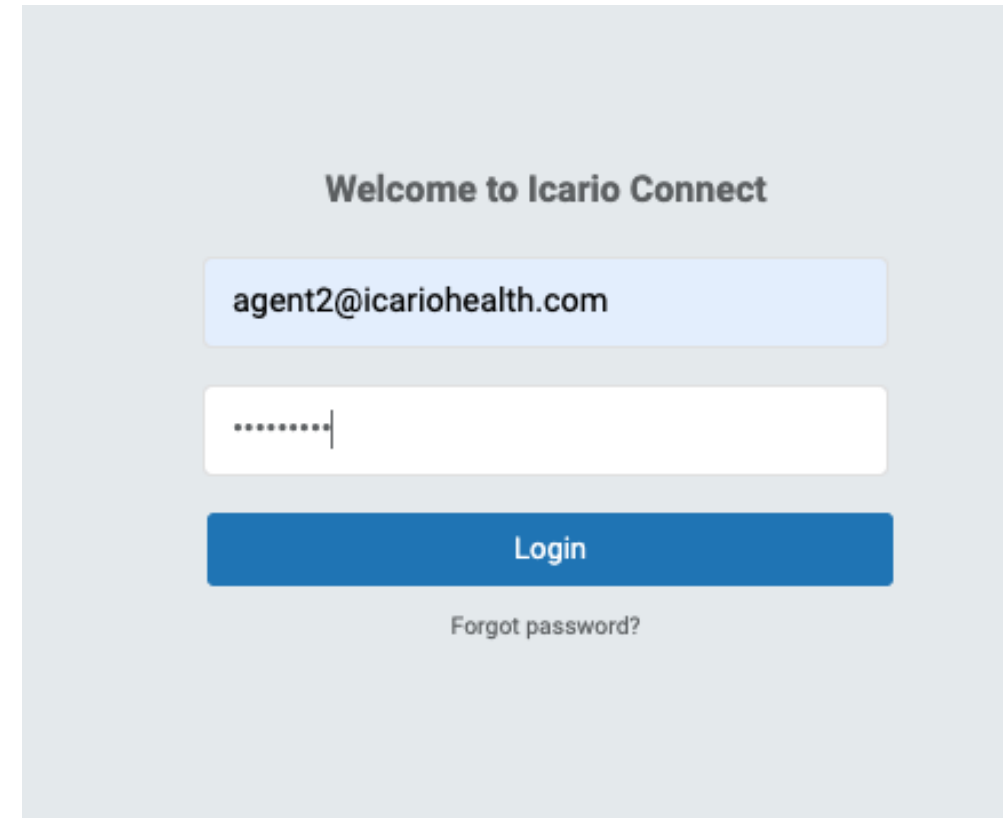
Login

[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



The image shows a login interface for 'Icario Connect'. At the top, it says 'Welcome to Icario Connect'. Below this is a light blue input field containing the email address 'agent2@icariohealth.com'. Underneath the email field is a white input field for the password, which is currently masked with seven dots. Below the password field is a solid blue button with the word 'Login' in white text. At the bottom of the form, there is a link that says 'Forgot password?'.

SIGNING IN: ICARIO CONNECT

Success! You've signed in.

- You are immediately brought to the homepage





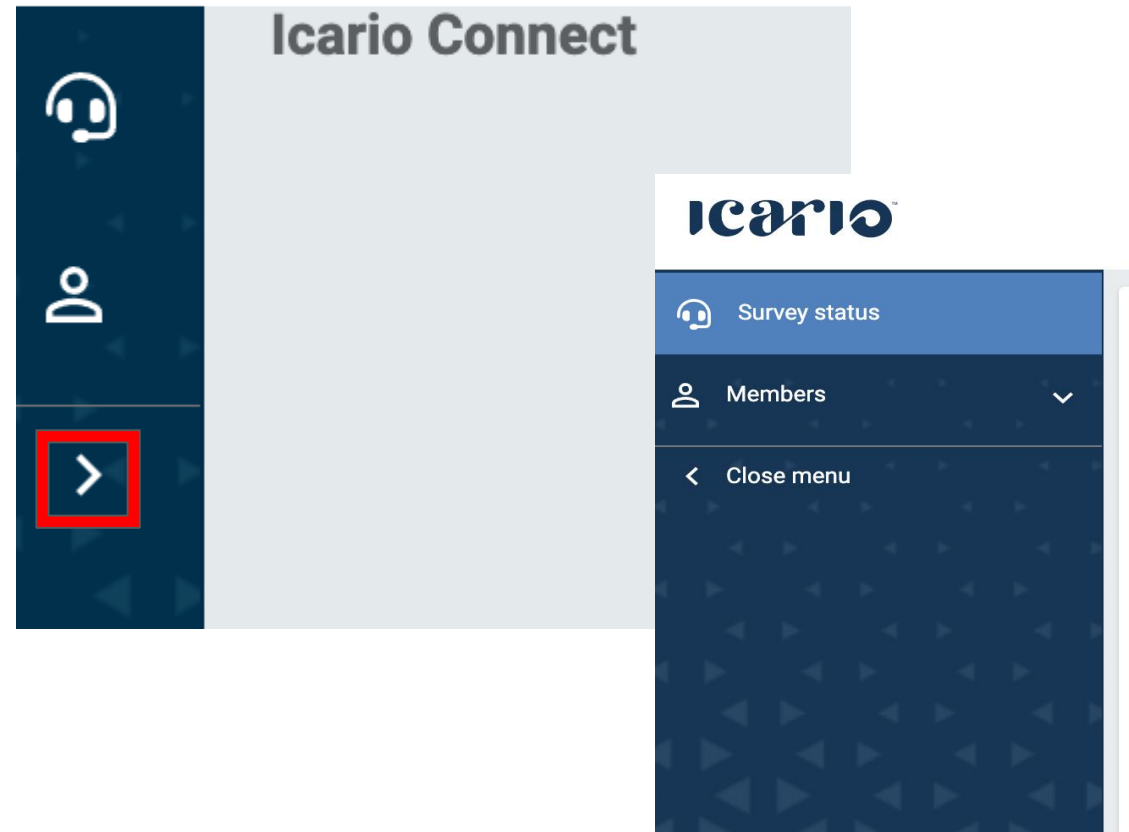
Starting & Completing an Assessment

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

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HEALTH ASSESSMENT: ADD PROSPECTIVE MEMBER

1) Select Members in the Navigation Bar

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Survey status

Members

Close menu

Member search

Clear all filters

Create prospective member

Apply

Select segment (0)Status (0)Profile IDInstrumentUsername

First nameLast name

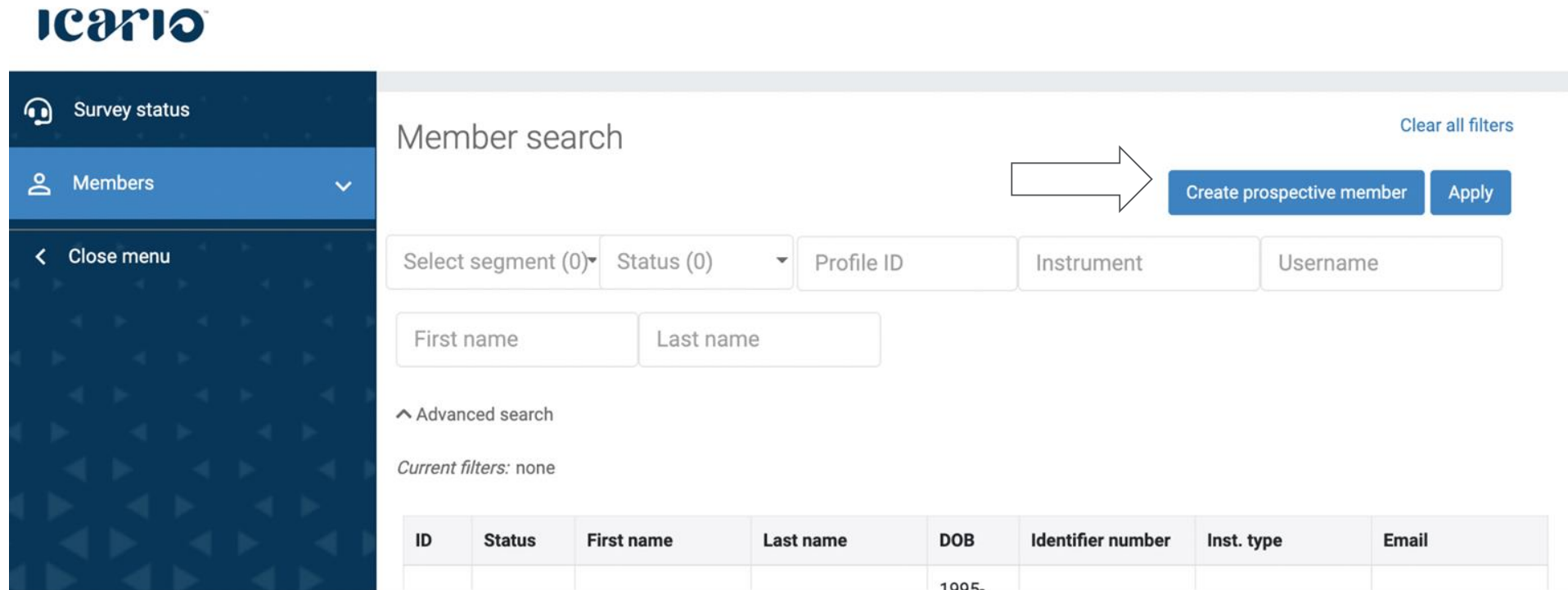
Advanced search

Current filters: none

ID	Status	First name	Last name	DOB	Identifier number	Inst. type	Email
				1005			

HEALTH ASSESSMENT: ADD PROSPECTIVE MEMBER

2) Click on Create prospective member in the Navigation Bar



The screenshot shows the icario web application interface. On the left is a dark blue navigation bar with the icario logo at the top. Below the logo are three menu items: 'Survey status' with a headset icon, 'Members' with a person icon and a dropdown arrow, and 'Close menu' with a left-pointing arrow. The 'Members' menu is currently selected. The main content area has a light gray header with the text 'Member search' on the left and 'Clear all filters' on the right. Below the header is a search form with several input fields: 'Select segment (0)' (a dropdown), 'Status (0)' (a dropdown), 'Profile ID', 'Instrument', 'Username', 'First name', and 'Last name'. To the right of the search fields are two blue buttons: 'Create prospective member' and 'Apply'. A white arrow points from the 'Member search' text to the 'Create prospective member' button. Below the search fields is an 'Advanced search' section with an upward-pointing arrow and the text 'Current filters: none'. At the bottom of the page is a table with 8 columns: ID, Status, First name, Last name, DOB, Identifier number, Inst. type, and Email. The table has one row of data with the following values: ID (empty), Status (empty), First name (empty), Last name (empty), DOB (1005), Identifier number (empty), Inst. type (empty), and Email (empty).

icario

Survey status

Members

Close menu

Member search

Clear all filters

Create prospective member

Apply

Select segment (0) Status (0) Profile ID Instrument Username

First name Last name

Advanced search

Current filters: none

ID	Status	First name	Last name	DOB	Identifier number	Inst. type	Email
				1005			

HEALTH ASSESSMENT: ADD PROSPECTIVE MEMBER

3) Fill in the member information

The following fields are required

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

The screenshot shows a web form titled "Prospective member" with a "Clear all filters" link in the top right. The form contains the following fields:

- First name *** (Required): Text input field.
- Last name *** (Required): Text input field.
- Middle initial**: Text input field.
- Gender *** (Required): Dropdown menu.
- DOB *** (Required): Date input field with a calendar icon, showing the format "yyyy-mm-dd".
- Select segments *** (Required): Dropdown menu with the option "Select segment".
- State *** (Required): Dropdown menu.
- Identifier type ***: Dropdown menu.
- Identifier number ***: Text input field with a "+" button to the right.

At the bottom right, a red error message states: "Please enter all required fields." Below the form are four buttons: "CANCEL", "SAVE", "ADD ANOTHER", and "GO TO MEMBER".

HEALTH ASSESSMENT: ADD PROSPECTIVE MEMBER

Segment field is a drop down list.

Select “MULTISTATE” under
Capital Blue Cross market in
screen

The screenshot shows a web form titled "Prospective member". The form contains the following fields:

- First name *** (Required): Text input field.
- Middle initial**: Text input field.
- DOB *** (Required): Text input field with a date mask "yyyy-mm-dd" and a calendar icon.
- State *** (Required): Dropdown menu.
- Identifier type ***: Dropdown menu.
- Identifier number ***: Text input field with a "+" icon.

A dropdown menu is open for the "Segment" field, showing the following options:

- ICARIOTENANT
- CAPITAL BLUE CROSS
- CAPITAL BLUE CROSS
- MEDICARE
- ☐ MULTISTATE

At the bottom of the form, there are four buttons: CANCEL, SAVE, ADD ANOTHER, and GO TO MEMBER. A red text note at the bottom right says "Please enter all required fields."

HEALTH ASSESSMENT: ADD PROSPECTIVE MEMBER

Identifier type is a drop-down field.

MBI should always be selected as the identifier

Prospective member

First name * (Required)

Last name * (Required)

Middle initial

Gender * (Required)

DOB * (Required)

Segments

Identifier type *

Identifier number *

Input identifier

MBI

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 titled "Prospective member" with the following fields and controls:

- First name *** (Required): Text input field.
- Last name *** (Required): Text input field.
- Middle initial**: Text input field.
- Gender *** (Required): Dropdown menu.
- DOB *** (Required): Text input field with a date format hint "yyyy-mm-dd" and a calendar icon.
- Segments**: Dropdown menu with "Select segment" as the placeholder.
- Identifier type ***: Dropdown menu with "MBI" selected.
- Identifier number ***: Text input field with a red box around it and a red "Input identifier" label below it. A blue "+" button is to its right.

At the bottom of the form are four buttons: "CANCEL", "SAVE", "ADD ANOTHER", and "GO TO MEMBER".

First name	Last name	Middle initial	Gender	DOB	Segments	Identifier type	Identifier number
John	Smith		Male	1995-08-18	1EG4TE5MK73	MBI	
Jane	Smith		Female	1995-08-18	1EG4TE5MK73	MBI	
Lisa	Smith		Female	1995-08-18	1EG4TE5MK73	MBI	
Gerard	Smith		Male	1995-08-18	1EG4TE5MK73	MBI	
Jerry	Smith		Male	1995-08-18	1EG4TE5MK73	MBI	
Karen	Smith		Female	1995-08-18	1EG4TE5MK73	MBI	

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 titled "Prospective member". The form contains several input fields and a dropdown menu. A red rectangular box highlights the "Identifier number" field, which is located below the "Identifier type" dropdown. The "Identifier number" field has a placeholder text "Input identifier" and a red asterisk indicating it is required. The "Identifier type" dropdown is currently set to "MBI". The "DOB" field is set to "yyyy-mm-dd" and has a calendar icon. The "Segments" dropdown is set to "Select segment". The "First name" and "Last name" fields are both required. The "Middle initial" field is optional. The "Gender" field is required and has a dropdown arrow. At the bottom of the form, there are four buttons: "CANCEL", "SAVE", "ADD ANOTHER", and "GO TO MEMBER".

First name *	Last name *	Middle initial	Gender *	DOB *	Segments	Identifier type *	Identifier number *
				yyyy-mm-dd	Select segment	MBI	Input identifier

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 titled "Prospective member". It contains several input fields and dropdown menus. A red rectangular box highlights the "Identifier number" field, which contains the text "8TT4-T88-TT88". Other fields include "First name" (Gerald), "Last name" (Tester), "Middle initial" (empty), "Gender" (Male), "DOB" (1952-08-08), "Segments" (Multi-State), and "Identifier type" (MBI). At the bottom, there are four buttons: "CANCEL", "SAVE", "ADD ANOTHER", and "GO TO MEMBER".

Field	Value
First name *	Gerald
Last name *	Tester
Middle initial	
Gender *	Male
DOB *	1952-08-08
Segments	Multi-State
Identifier type *	MBI
Identifier number *	8TT4-T88-TT88

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.

Prospective member

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

Gerald Tester

Middle initial Gender * (Required)

Male

DOB * (Required) Segments

1952-08-08 Select segment

Identifier type * Identifier number *

MBI 8TT4-T88-TT88

CANCEL SAVE ADD ANOTHER GO TO MEMBER

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 CBX MEMBER HRA.

Click on Take Survey.

Member Details: CBC Prospective

Ways to Earn

Effective Date ☐ Show Hidden Promotions [Clear all filters](#)

Current filters: none

CBC Prospective ☐ Display All Programs

Program	Max Reward	Program Status
10742-1532451-CBC-Medicare-AgentPortal-2022		ACTIVE i

CBC AGENT PORTAL

CBC Member HRA [i](#) [^](#)

CBC Prospective

Status: **PROSPECTIVE**

Profile ID: 699

Segment: IcarioTenant:Capital Blue
Cross:Capital Blue
Cross:Medicare:MultiState

Gender: Male

DOB: 2022-08-29

Created On: 2022-09-20

Last Login:

Identifier Type: MBI ★ ID: 1EG4FE5KK78

Contact |

n/a

n/a

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.

In general, how do you rate your overall health?

☐ Excellent

☐ Very good

☐ Good

☐ Fair

☐ Poor

[< Back](#)

[Next >](#)

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



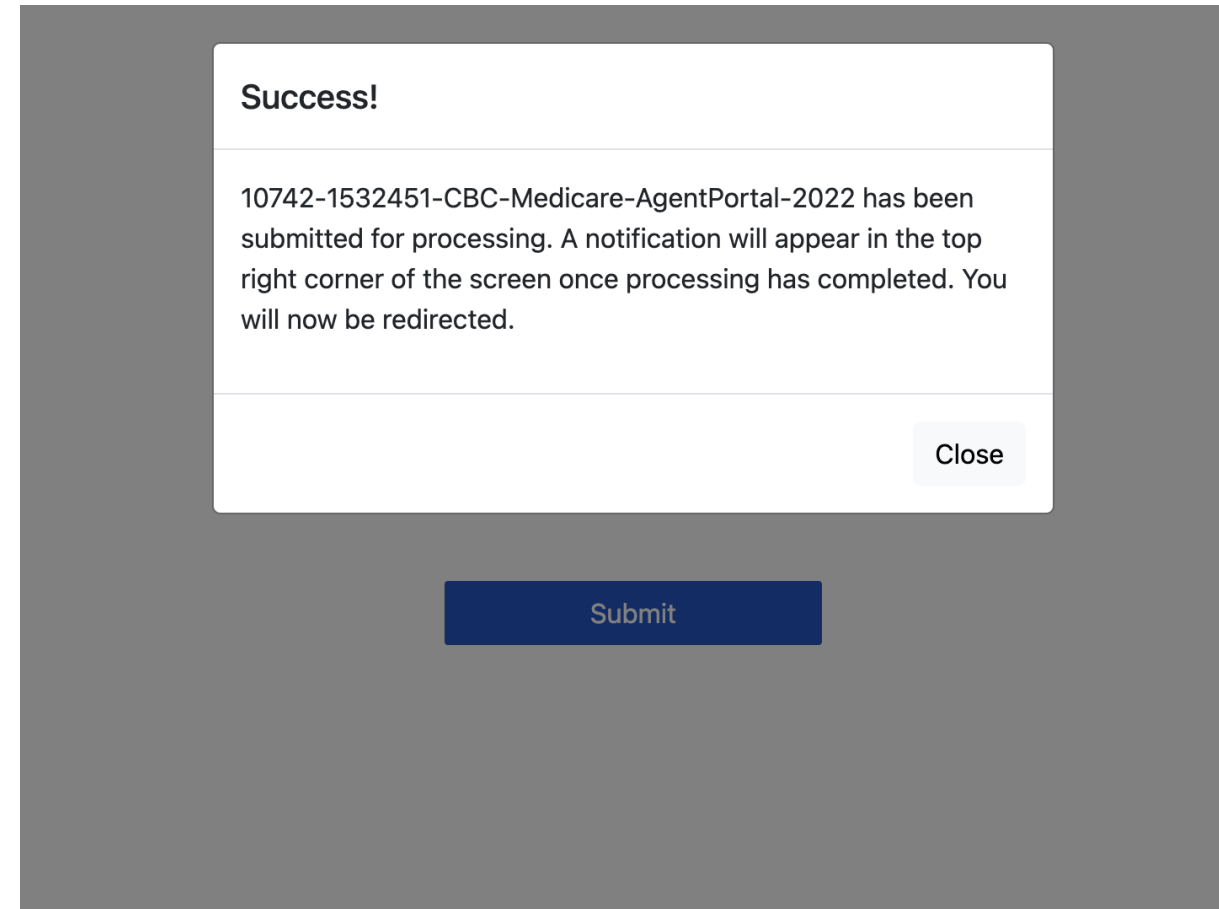
Are you sure you want to submit the survey?

Cancel

Confirm

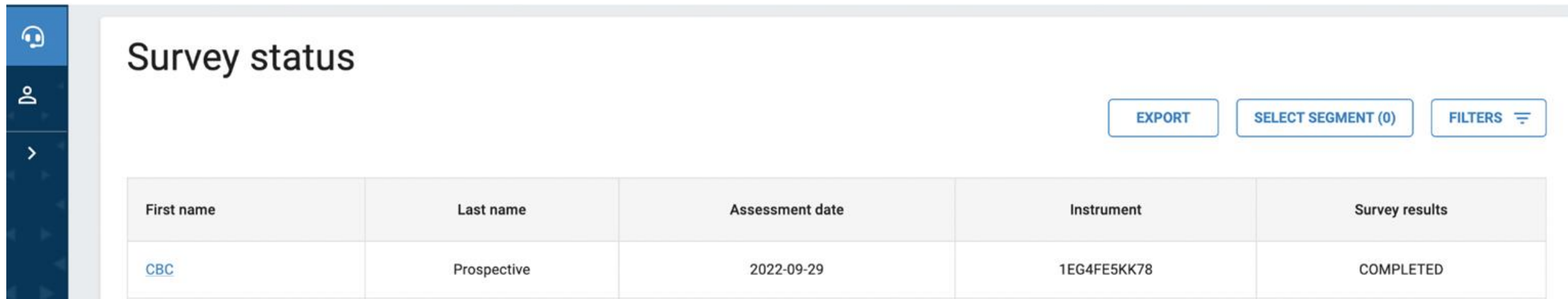
HEALTH ASSESSMENT: NAVIGATING THE ASSESSMENT

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



AGENT DASHBOARD

You can view your completed surveys by navigating to the Survey Status icon in the navigation menu.



Survey status				
			EXPORT	SELECT SEGMENT (0) FILTERS
First name	Last name	Assessment date	Instrument	Survey results
CBC	Prospective	2022-09-29	1EG4FE5KK78	COMPLETED

Thank You

Appendix