

**Broker Quick Reference Guide**  
**Envisionrxplus.com**

**Broker Support:** [envisionagentsupport@envisionrx.com](mailto:envisionagentsupport@envisionrx.com)

**Toll Free:** 844-348-9604

**WRITING CODE:**

Re-contracting agents will maintain the same Writing Code in 2019 as they had in 2018. However, you will not be able to write new business for 2019 unless your certification and training is complete in the Callidus Cloud onboarding system.

New agents will receive their writing code in an email after completion of the full onboarding in the Callidus Cloud system. You will receive a Welcome Email with your Writing Number and credentials for logging into the Incentive Management System for application status review and commission statements. Your user id and temporary password will be in the email. You will be asked to change your password. <https://eic.callidusinsurance.net/ICM/>

**APPLICATION SUBMISSION:**

**Envision will only accept applications submitted through the Broker Portal electronically. Faxes are no longer acceptable unless previously approved by the plan for good cause.**

**Mandatory Method for Agent:**

1. **Applications Submitted Electronically by Broker:** Broker has either met in person with the enrollee or their power of attorney, or talked to them over the phone about their Prescription Drug Plan (PDP) options and the enrollee has chosen EnvisionRxPlus as their PDP plan.
  - Broker has collected the signed Scope of Appointment (SOA) and paper application in person or through the mail from the enrollee or their designee (SOA does not need to be signed 48 hours in advance).
  - If you are entering the application into the portal while present with the prospect and they are signing the application and submitting with you present, then a paper application is not needed, just the SOA.
  - For paper applications collected by the broker, the broker enters the application information through the [envisionrxplus.com](http://envisionrxplus.com) website by going to the Broker Tab and signing into the Broker Portal.
  - Complete the application. Attest that you have the paper application (if applicable) and SOA (always).
  - Review the data fields for accuracy.
  - Submit.
  - You will receive immediate confirmation with the member's EnvisionRxPlus ID number and have the ability to Print what you submitted.
  - Application will be sent to CMS for approval. Enrollment will be pending until CMS approves.
  - You will be able to track application status through the EnvisionRxPlus Broker Portal or the Callidus Cloud ICM system.
  - Do not Fax the SOA or the Paper Application to Envision. Keep in your records for auditing purposes for 10 years in accordance with CMS regulations.
2. **Applications Submitted Electronically by Member:** Enrollee will follow the Enroll Now path or Let's Find A Plan path on the home page of our [envisionrxplus.com](http://envisionrxplus.com) website.
  - SOA is necessary for ALL sales and the broker will keep it on file for 10 years.
  - No paper application is needed if the enrollee is completing the application online themselves (without the broker present)
  - Enrollee that is without their agent can enroll online and the broker can still be designated as the agent of record. Must have SOA.
  - Complete the application.
  - **Broker Information Section:**  
When the enrollee is completing the online application themselves and the broker is not present the member must check the box that says "I am the member working with an agent/broker." They will be asked to fill in the agent/broker's name, Broker Writing Code and phone number (optional).
  - Review all data entry fields.
  - Submit.

- Enrollee will receive immediate confirmation with their EnvisionRxPlus ID number and can print what was submitted.
- Application will be sent to CMS for approval. Enrollment will be pending until CMS approves.
- You, the broker/agent will be able to track application status through the EnvisionRxPlus Broker portal or the Callidus Cloud (ICM) system.
- No paper forms will be sent to Envision. The Agent will still keep the SOA on file for auditing and for 10 years in accordance with CMS regulation.

3. Approved Fax Exceptions will be faxed to: **844-645-0583**

Broker has 72 hours from collection of a paper application to upload the data into the EnvisionRxPlus Broker Portal application. If for some reason you do not have internet access during this 72 hour window and need to fax the application to Envision, get approval from Broker Support to Fax the application  
Requested by Broker Support

- Fax paper applications to EnvisionRxPlus at this FAX LINE only if one of the electronic methods above was not followed. **FAX 844-645-0583** PLEASE MAKE NOTE OF THIS NEW NUMBER IN YOUR FAX SYSTEMS.
- **ONLY SUBMIT ONE APPLICATION PER FAX**

**ORDERING SUPPLIES:**

Envision will automatically send you supplies upon contracting or re-contracting. If you need additional supplies throughout the year order the quantity you need on our website at [envisionrxplus.com](http://envisionrxplus.com); go to the Broker Tab, (don't log into the Broker portal) scroll down to the mid-section and select Order Supplies. Or use this link: <https://envisionstore.convergenceweb.com>

All brokers will access the supply order site by logging in with the following information:

**User Name:** Your Email Address

**Password:** Your current Envision 2018 Writing Number or if new to Envision this year, your new 2019 Writing Number that you receive after you become a "ready to sell" broker for 2019 selling season.

**Please keep in mind that this log in is different than other sites you may use with Envision. This site will not work until you are loaded into it which will take 24 hours from the time you become ready to sell.**

**APPLICATION STATUS:** Go to Broker Portal on our web site. <https://broker.envisionrxplus.com/> . If you are new to Envision this year, you must first register. Here you will be able to find the status of your application. If you already registered in 2018, there is no need to reregister. Your User Name is your email address and the password must be eight or nine digits with one upper-case letter, one number and one special character. If you forgot your password, please select "reset password."

HINT to find enrollments:

- Populating multiple fields when locating a client will cause an error. Instead, search only by last name or the EIC number.
- Preferred method to search application status is by "Effective Date." Please enter the same date for both the Start Date and Stop Date fields.

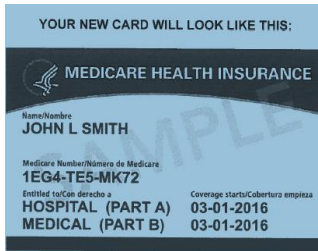
**Alternate Method: Callidus Cloud** <https://eic.callidusinsurance.net/ICM/>

After you complete 2019 onboarding and begin your AEP selling season, you will be able to track application status on the Callidus Cloud (ICM) broker portal. You will find Application Status in the left side Navigation section of the site called Customer Application Search.

**COMMISSION STATEMENTS:** <https://eic.callidusinsurance.net/ICM/>

- Commission Statements will be available online through the Callidus Cloud (ICM) broker portal.
- Your user name is your six digit writing number starting with 00xxxx. Password is what you chose. If you don't remember your password, follow the prompts by clicking: Forgot Password.
- Statement link is on the left side.

**Medicare's NEW MBI numbers:** The new Medicare Number is a unique combination of numbers and letters. Numbers used: 0-9 Letters **NOT** ever used: S, L, I, O, B and Z.



When entering the MBI number on the enrollment application, **DO NOT USE THE HYPHENS**, it will reject.

### **HELPFUL HINTS:**

Correct Election Type/Period needs to be indicated in order for enrollment to process your application

- If the member is not in their Initial Enrollment Period (IEP) and it is not the Annual Enrollment Period (AEP), a Special Enrollment Period (SEP) REASON needs to be specified on the application.
- SEP Qualifier examples include: Losing Employer Coverage (LEC), involuntarily losing credible drug coverage, moving out of state, and moving out of a Long Term Care (LTC) Facility.

### **Late Enrollment Penalty**

Medicare beneficiaries may incur a late enrollment penalty (LEP) if there is a continuous period of 63 days or more at any time after the end of the individual's Part D initial enrollment period during which the individual was eligible to enroll but did not enroll in a Medicare Part D plan. If Medicare believes there were uncovered months, a Creditable Coverage document will be sent by EnvisionRxPlus to the member. If the member had creditable coverage for the uncovered months, an attestation form can be filled out and sent or faxed to the plan at 330.486.4801, Attn: Enrollment Services. The member may also call 866.205.2005 and do a Verbal Attestation. Copies of the attestation form can be found in the Resources section at [www.envisionrxplus.com](http://www.envisionrxplus.com).

### **Application Submission Dates**

- The new application process will ask you for the application signature date and the effective date.
- You may submit an application on the broker portal up to 72 hours after the application signature date. For example, if the application is completed on 10/30 with an effective date of 11/1, it can still be submitted online on 11/1 or 11/2.
- You may submit applications three months in the future, maximum. For example, submit application in July for an October effective date at the latest or submit in August for November.
- Commissions are paid out towards the end of the month **AFTER** the effective date starts.
- Renewal commissions are paid out in full in January of each year.
- SOA is required for ALL applications.