Miramar:Agent
Agent User Guide

Rev. 3/2019

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I. INTRODUCTION

This document is housed on the Miramar:Agent Knowledge Base for Agents [(https://convey.na2.teamsupport.com/knowledgeBase/5071183)](https://convey.na2.teamsupport.com/knowledgeBase/5071183).

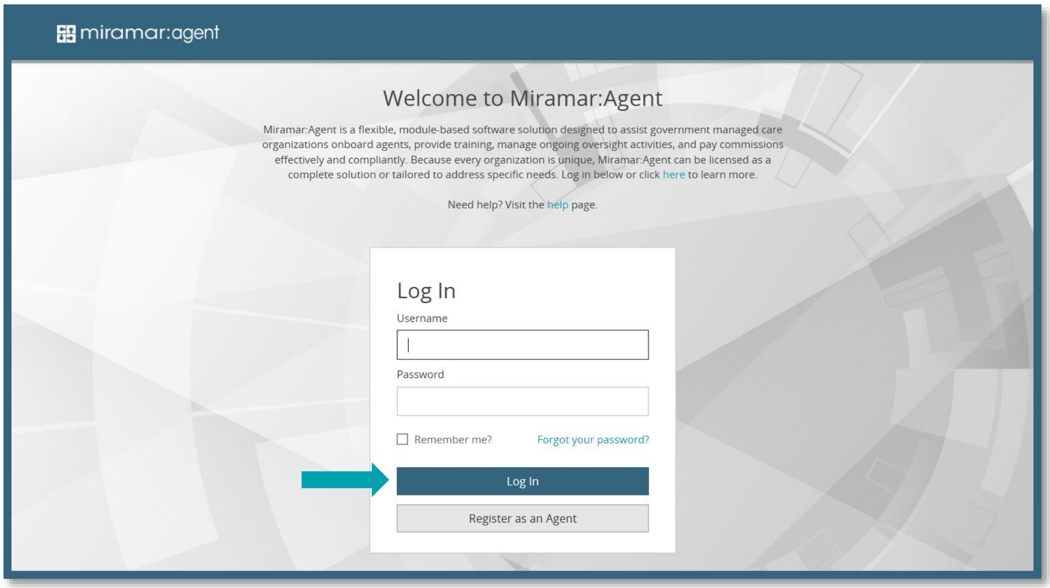
Miramar:Agent is a web-based, multi-tenant software solution. Information in this User Guide covers all agent-facing functions and features of Miramar:Agent. Your available features and services may vary.

II. GETTING STARTED

ACCESSING THE SYSTEM

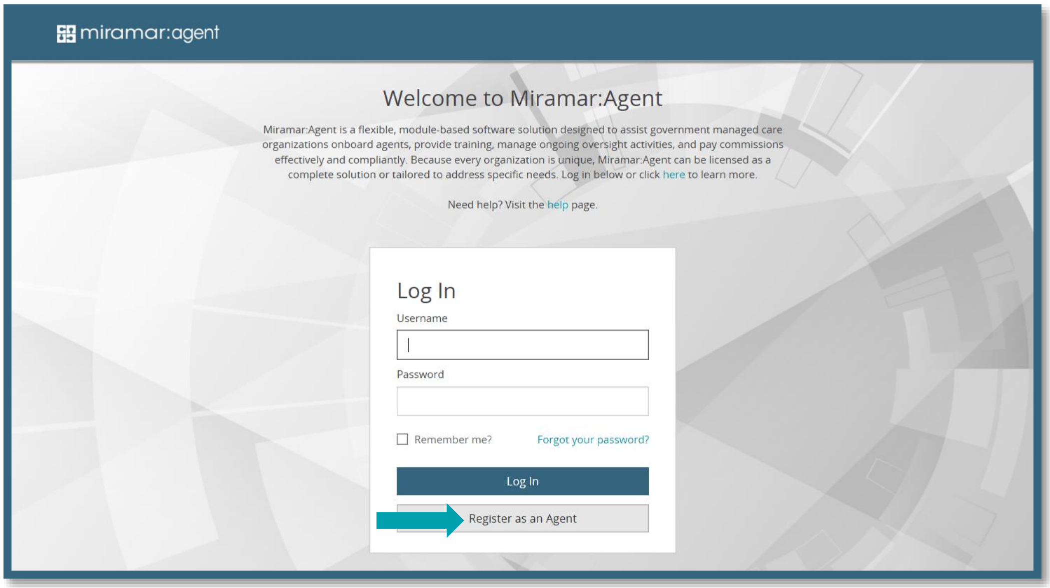
As a Miramar:Agent user, you will only ever need one set of login credentials from which you can access plans you have been granted access to in the system. To log in to your account, go to www.miramar-agent.com and enter your username and password on the main landing screen. Click **Log In**.

TEAM SUPPORT: Logins are NOT carrier/plan or program specific. Returning users will use their existing username and password to access any additional programs they need to complete.



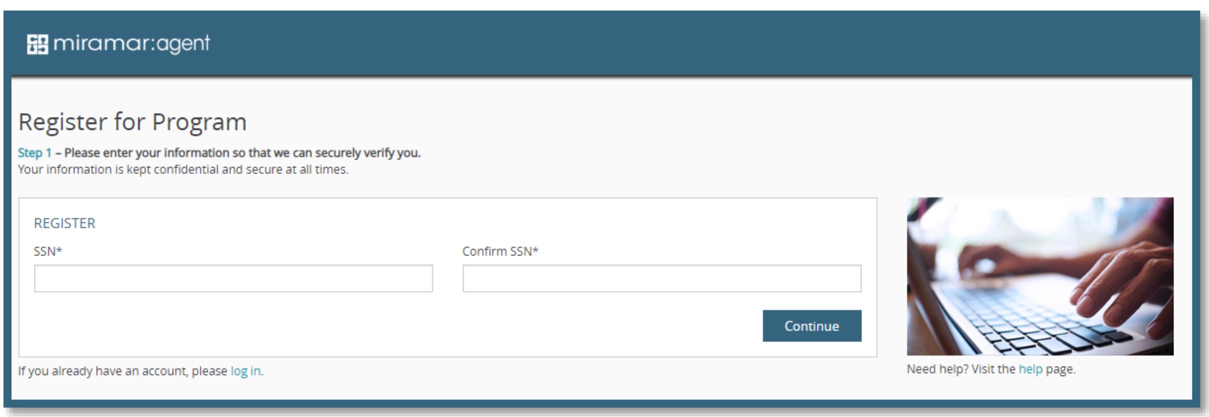
How do I register as a new agent?

First-time users will need to register as an agent in the system. Click on **Register as an Agent**.

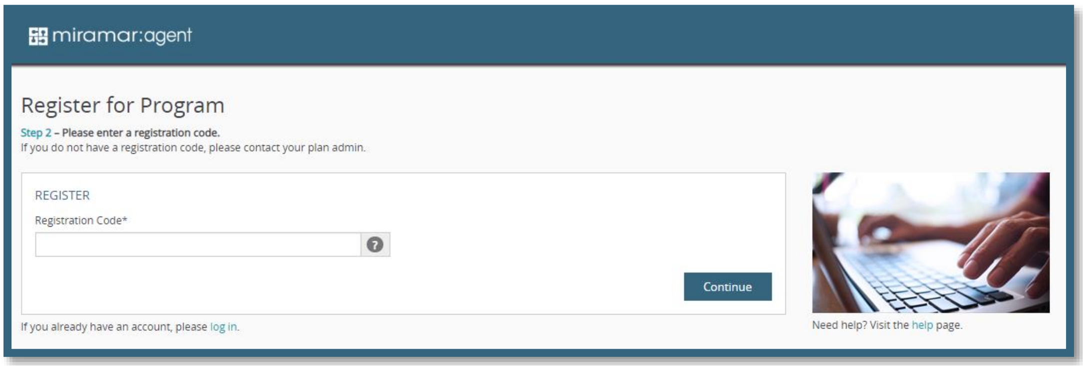


First, you will be asked to enter your Social Security Number (SSN). SSN is the unique identifier for users in the system. This step will check all existing users to verify the SSN entered does not already exist in a profile.

IMPORTANT NOTE: Failure to use a valid SSN could result in the inability to successfully complete a program, as the SSN is used for certain actions such as background checks.



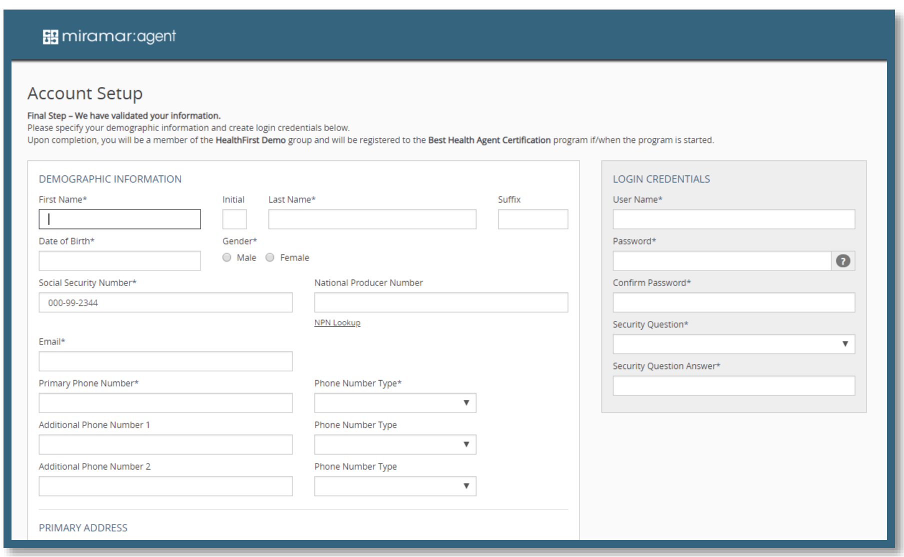
Agents who were given a Registration Code by their carrier or upline will enter the code immediately following the SSN validation. If you are not asked to enter a Registration Code, you were pre-enrolled into a program.



Enter your demographic information, a username, password, and security question and answer. All fields marked with an asterisk (*) are required. Click **Complete Registration** once you have completed the form. Once you have completed registration, you will be taken to your agent dashboard.

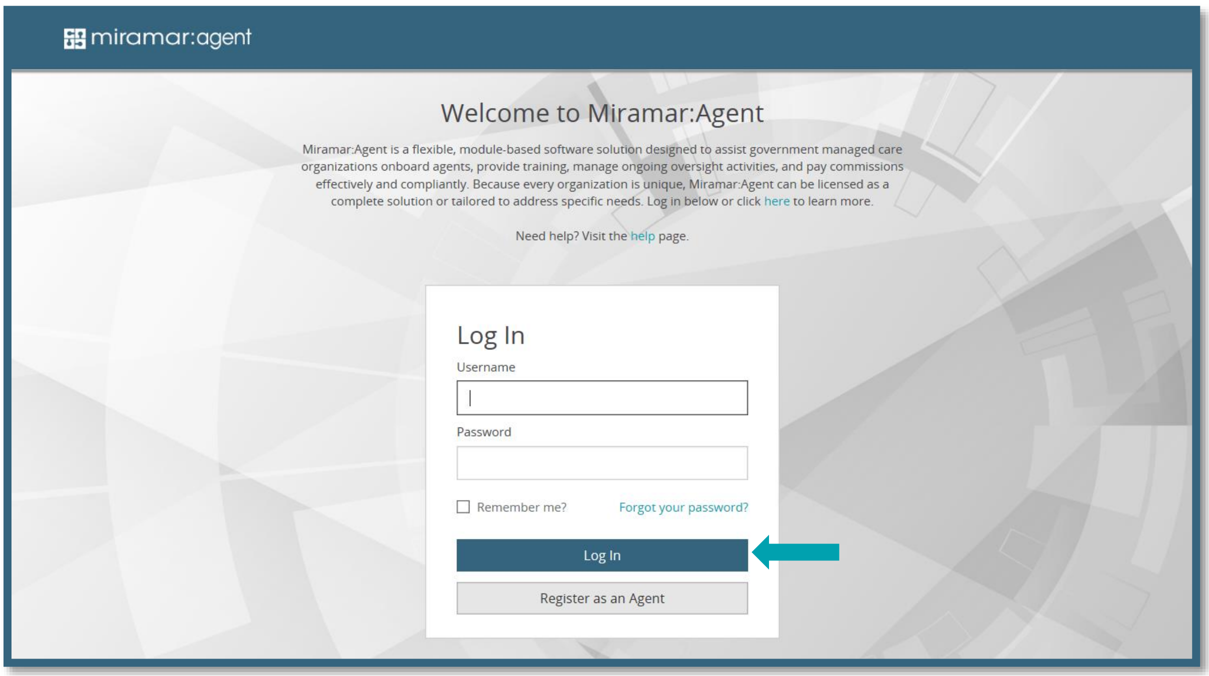
IMPORTANT NOTE: For security purposes, your SSN may not be used as your username.

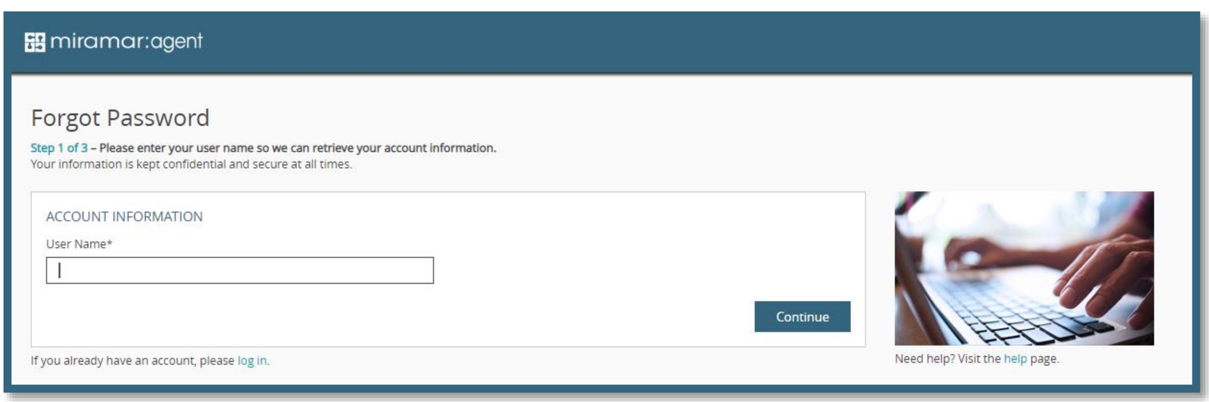
HINT: Passwords are required to contain a minimum of eight characters with at least one uppercase letter, one lowercase letter, one number, and one special character. Example: Password1#



How do I reset my password?

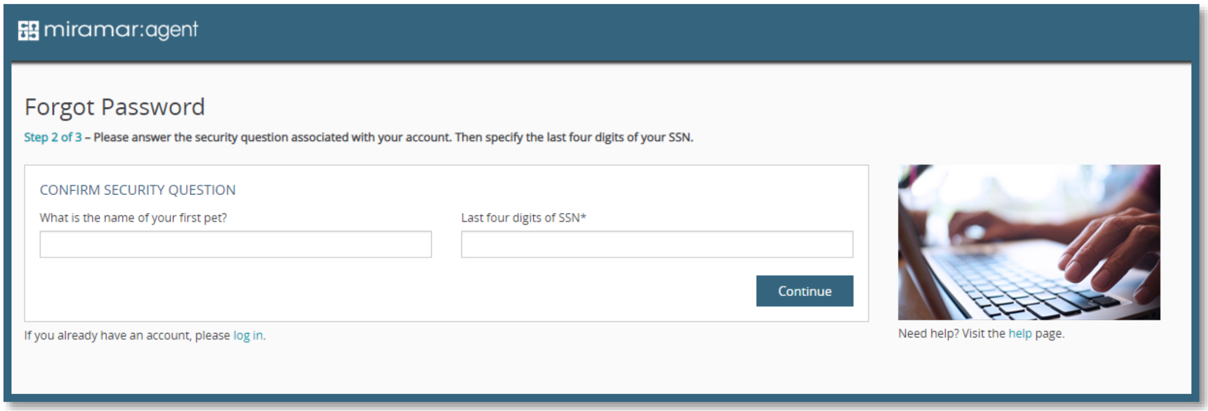
If you've forgotten your password, you can reset it directly from the login screen using a password reset wizard. Click on **Forgot your password?** and enter your username when prompted, then click **Continue**.





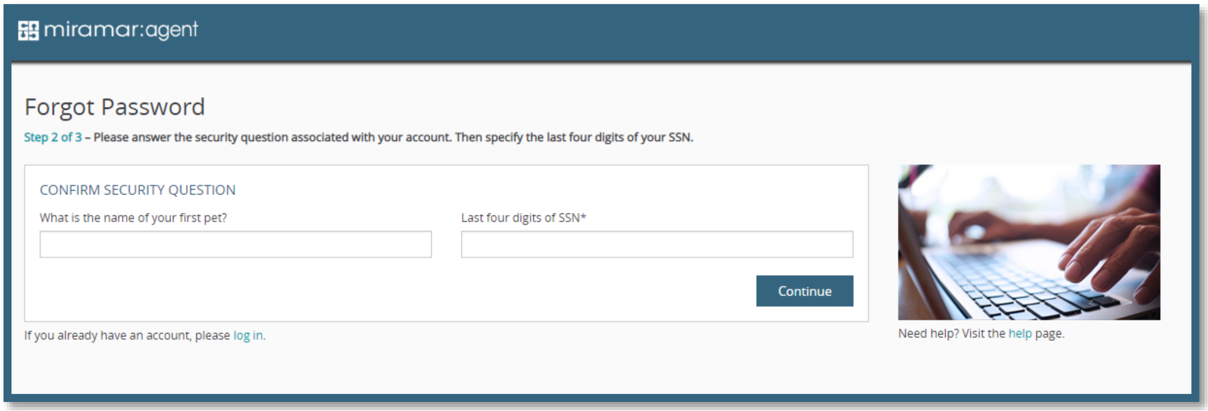
Next, confirm the answer to your self-selected security question and the last four digits of your SSN and click **Continue**.

QUICK TIP: If you cannot remember the answer to your security question, you will need to contact the Helpdesk to answer additional questions to verify your identity and update your password. To contact the Helpdesk, create a ticket by clicking here or call using the plan-specific phone number provided by your plan representative.

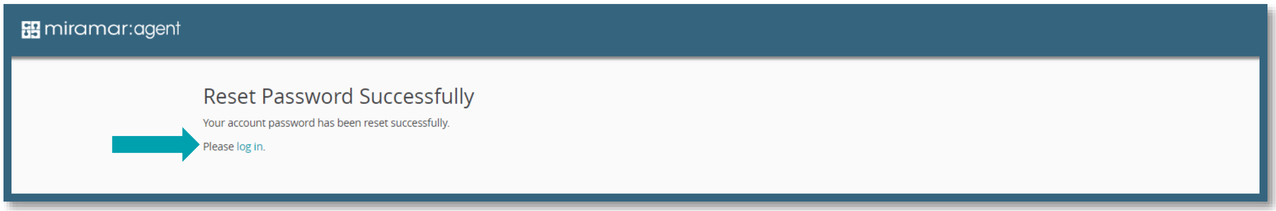


Enter a new password and confirm by re-entering, then click **Reset Password**.

NOTE: Passwords are required to contain a minimum of eight characters with at least one uppercase letter, one lowercase letter, one number, and one special character. Example: Password1#



Once you have successfully reset your password, click **log in** to return to the login page.



OPTIMIZING YOUR EXPERIENCE

In order to optimize your certification experience in Miramar:Agent, please ensure you are using one of our supported browsers and have enabled pop-ups in your browser settings.

Supported Browsers

Compatibility for Miramar:Agent is tested with the following browsers:

- Firefox
- Chrome
- Internet Explorer (IE) 9+

Our team uses, and we recommend, Internet Explorer 11. It is important you have enabled pop-ups before you access Miramar:Agent.

QUICK TIP: Restrictive security software can interfere with the ability to communicate training results to the learning management system from your browser. Click here for more information about what sites to set as secure.

- https://*.gormanhealthgroup.com
- https://*.teamsupport.com
- https://*miramar-agent.com

Enabling Pop-Ups

It is important you have enabled pop-ups before you access Miramar:Agent, as trainings will pop up in a second tab or window.

TEAM SUPPORT: Click here for more information on how to enable pop-ups in FireFox, Google Chrome, and Internet Explorer.

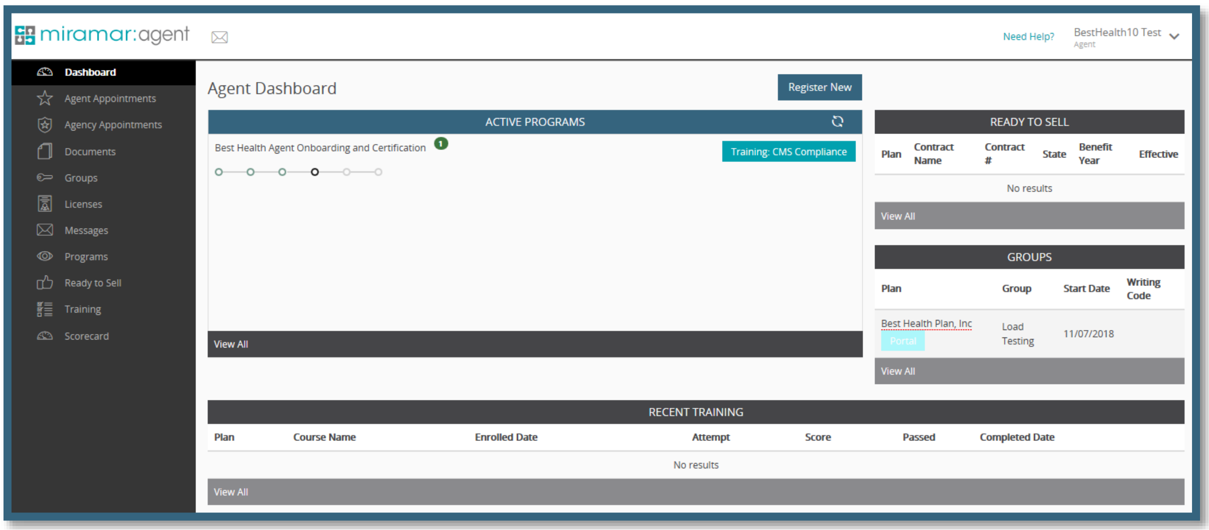
III. AGENT DASHBOARD

The Agent Dashboard is the hub of Miramar:Agent while also providing a snapshot of your current activity in the system. On your dashboard, you will see widgets for the following current information:

- Active programs
- Ready to sell information (current and previous benefit years)
- Group affiliations
- Recent training information

To view the full index of any of the dashboard widgets, click **View All**. From the individual index, you will be able to search and filter the available information.

From the dashboard, you can action any active program steps, edit your profile information, and access any of the tabs from your left side navigation menu.

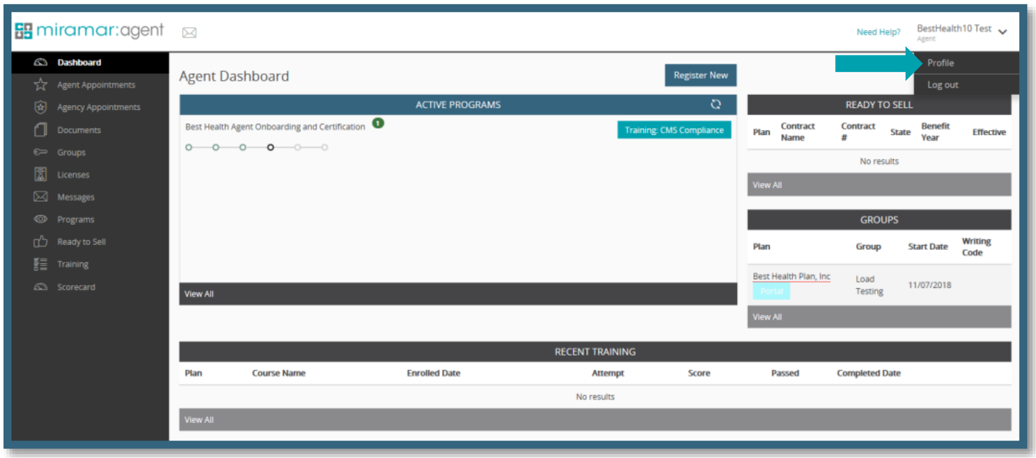


PROFILE MANAGEMENT

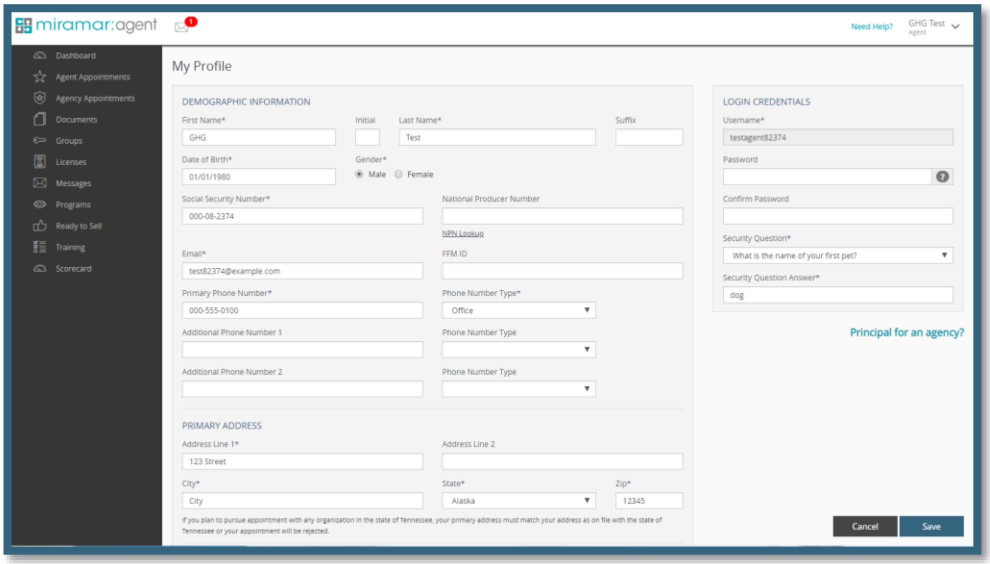
How do I update my profile information?

You can update your profile demographic information, change your account password, or change your security question and answer at any point in time after completing registration.

To do so, move your cursor to the upper right corner of your screen and click the down arrow that appears to the right of your name. A drop-down menu will be displayed. Select **Profile**.



Once you've made the desired changes to your profile, be sure to click **Save** at the bottom of the screen before you leave the page.



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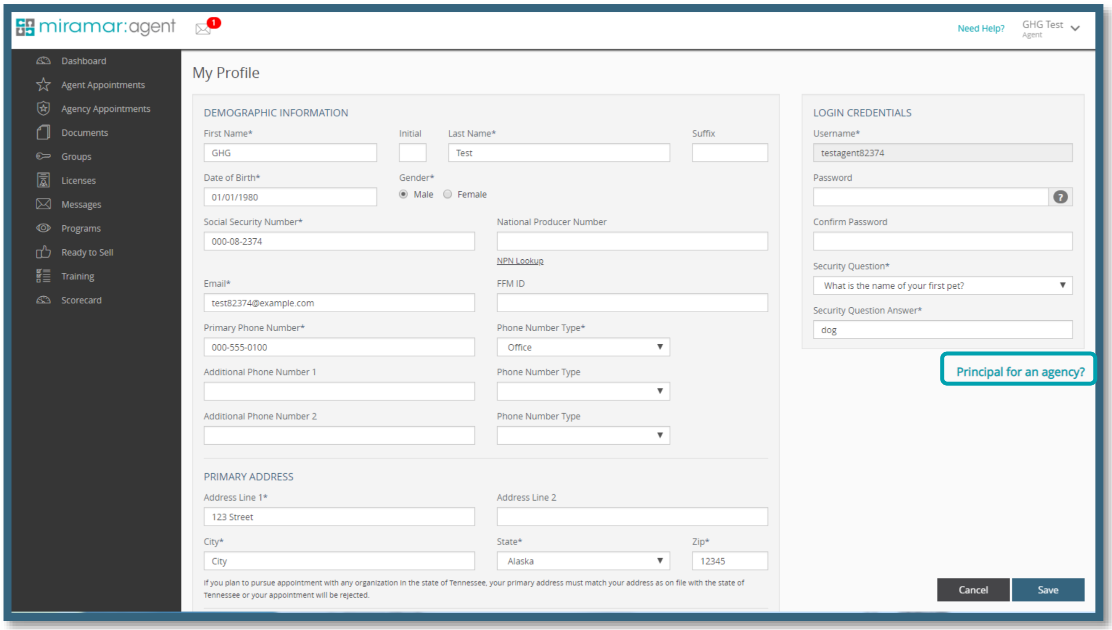
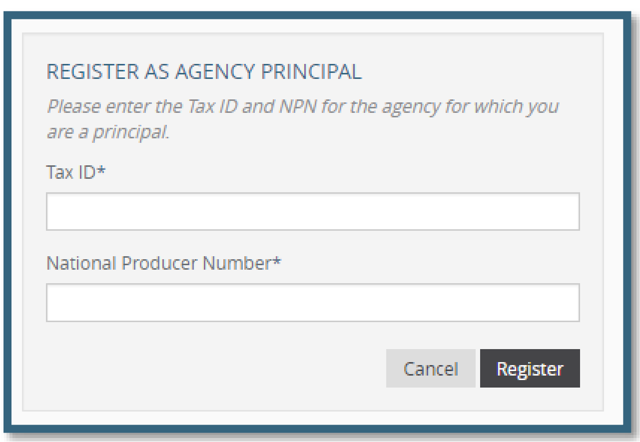
How do I register as the principal of an agency?

If you are an agency principal, you must register as an individual before you will be allowed to register as the principal of an agency. Once you have completed your individual profile, proceed to the *My Profile* page and click **Principal for an agency?**



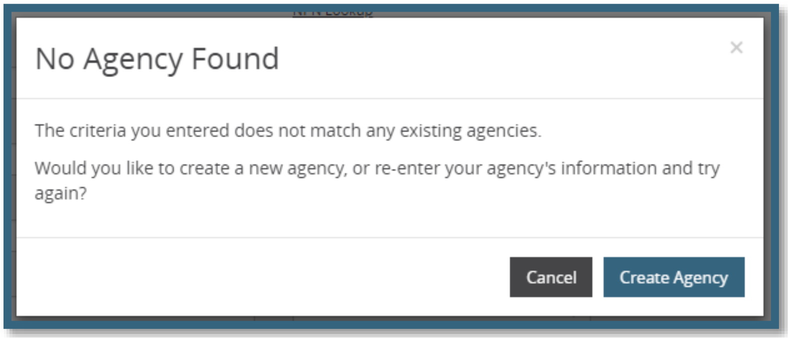
Enter the required agency information (Tax ID and National Producer Number (NPN)). Click **Register**.

IMPORTANT NOTE: You must provide the *agency* NPN and *agency* Federal Employer Identification Number (FEIN). Both are validated during the initial license check. If they do not match the values provided by the National Producer Insurance Registry (NIPR), no data will be imported, and you will not be able to proceed in your program without intervention.

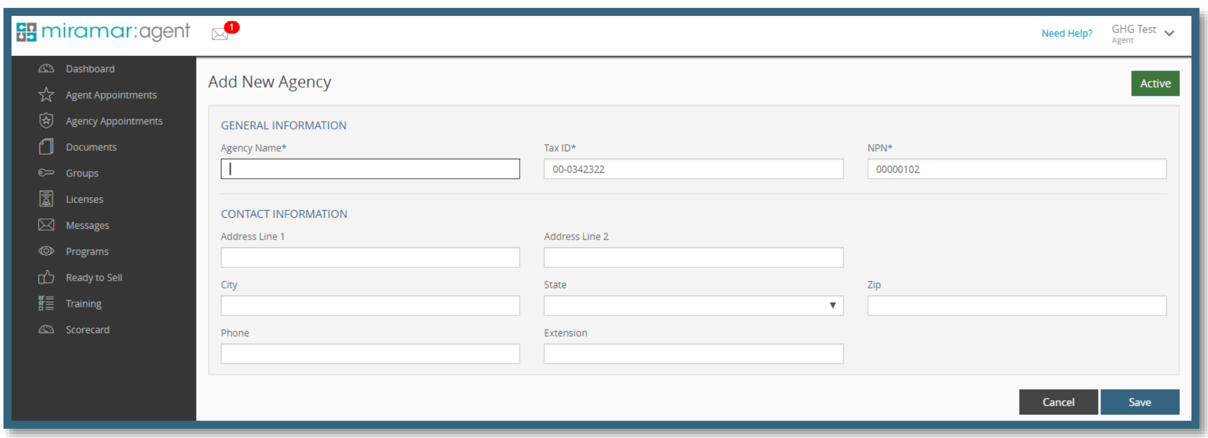


New agency in Miramar:Agent

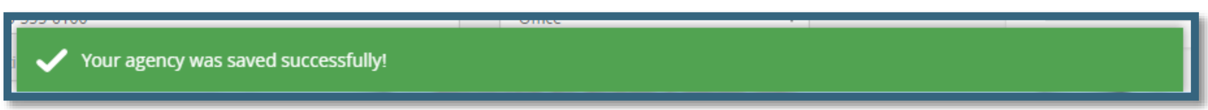
If the agency does not already exist in Miramar:Agent, a new agency will need to be created. Click **Create Agency**.



You will be prompted to fill in the name of the agency as well as option contact information. Click **Save** once you have completed the required fields.

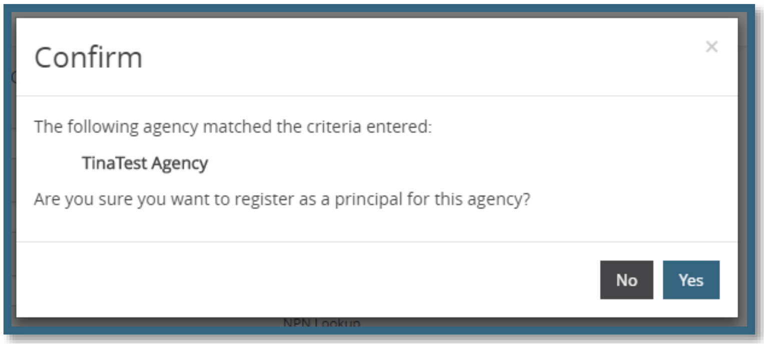


Once the agency has successfully saved, you will see the message below at the bottom of your screen.

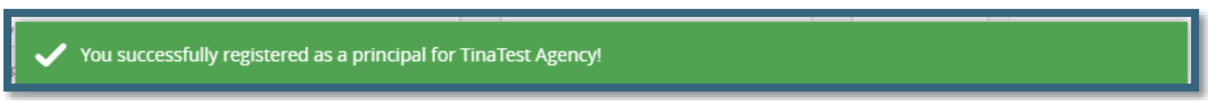


Existing agency in Miramar:Agent

If the agency has already been established in Miramar:Agent, you will see the confirmation pop-up below. Once you have confirmed the name showing on the form matches the agency you are attempting to register, click **Yes**.



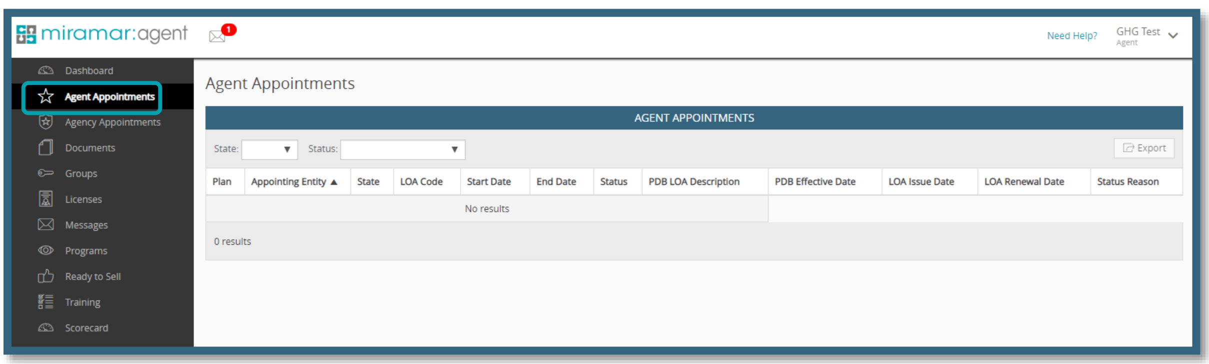
Once you have confirmed, you will see the message below at the bottom of your screen.



AGENT APPOINTMENTS

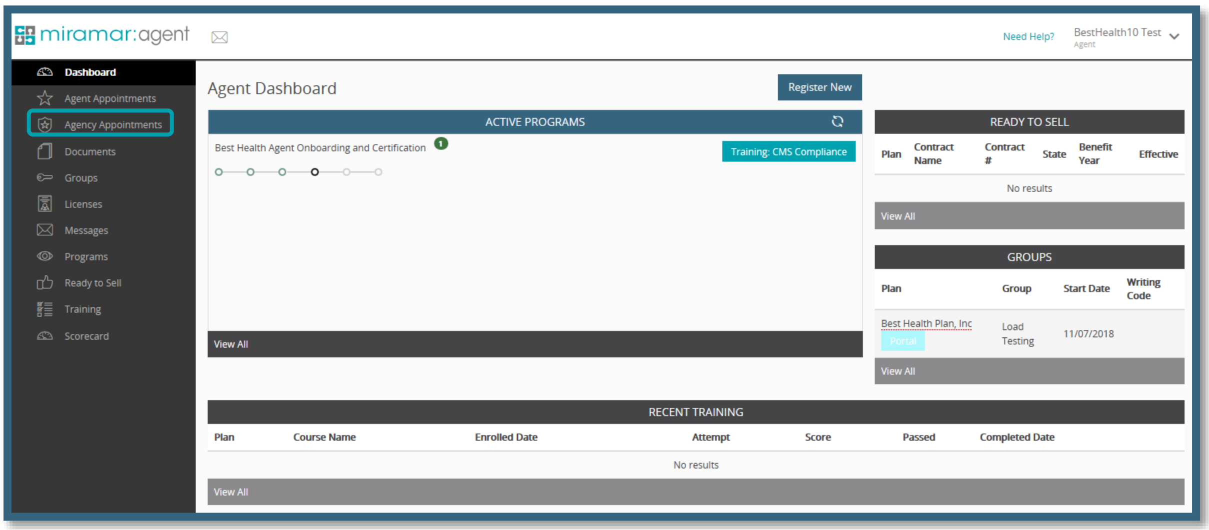
To view your agent appointments, click **Agent Appointments** in the Dashboard menu to the left of the screen. This will provide a snapshot of your appointments. To see all of your appointments, click **View All** in the gray bar below the displayed appointments.

IMPORTANT NOTE: Appointment information is refreshed on a daily basis from NIPR for those plans that license appointment services.



AGENCY APPOINTMENTS

If you are registered as a principal of an agency and have gone through an agency program that included a license check step, you will be able to view any appointments associated with that agency. Click **Agency Appointments** in the Dashboard menu to the left of the screen to view your agency appointments.



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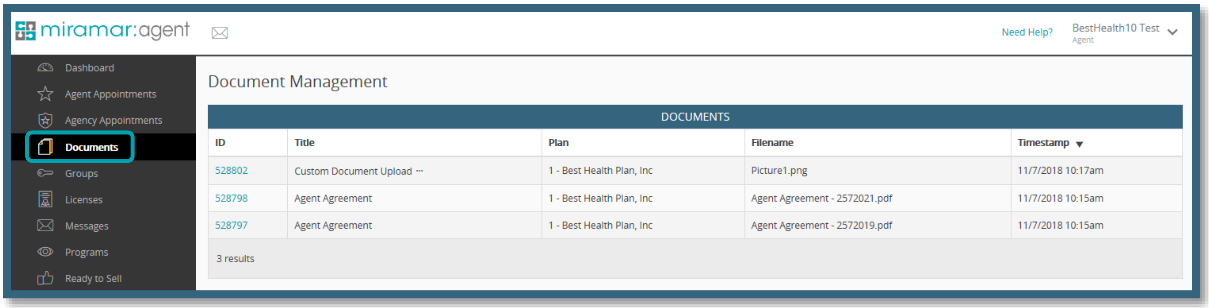
DOCUMENTS

To view your uploaded and saved documents, click into Documents in the Dashboard menu to the left of the screen. Your documents can include training certificates, completed forms, uploaded E&O, or any other documents your plan saved during your program completion or requested to be uploaded.

To view a document, click into the Document ID.

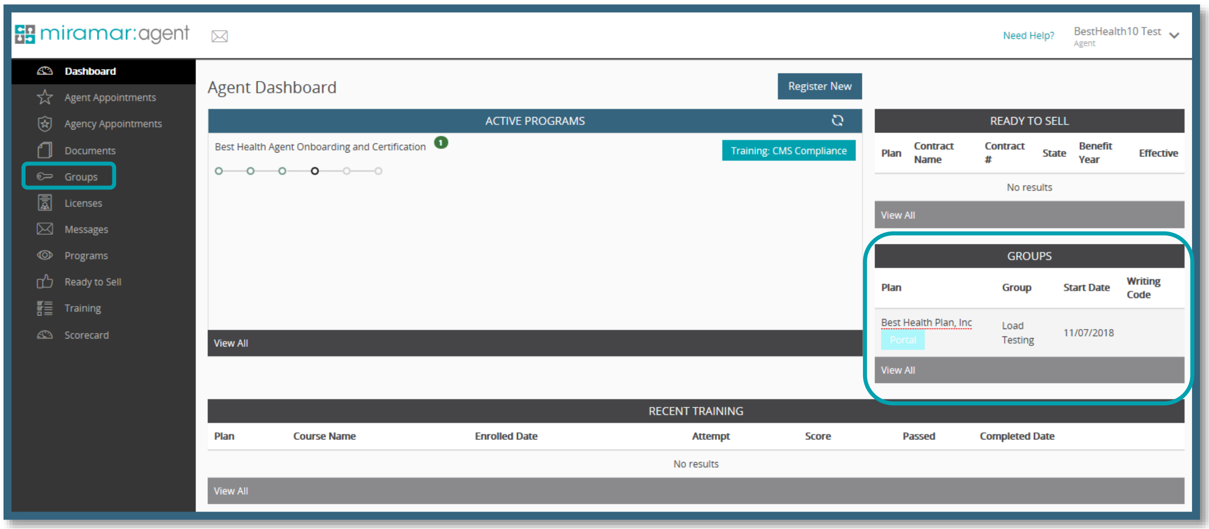
NOTE: If a document requires review, you will see an icon next to the document title indicating if it is approved ✓, denied **X**, or not yet reviewed **…** . You can hover over the icon to view the status description.

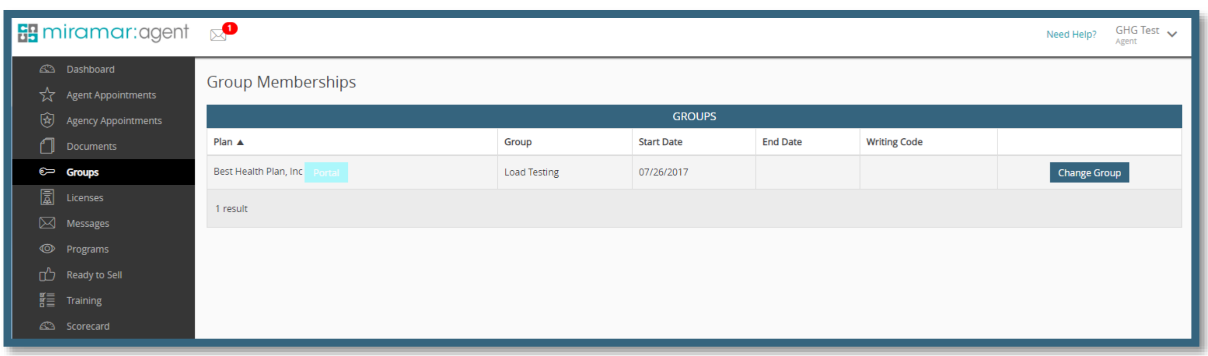


How do I upload a certificate or document? For information on how to upload documents within a program, see the section on *Program Navigation.*

GROUPS

To view a full history of your group affiliations for your plans, click **Groups** in the Dashboard menu to the left of the screen. The widget on your Dashboard will provide a snapshot of the groups with which you are currently associated.



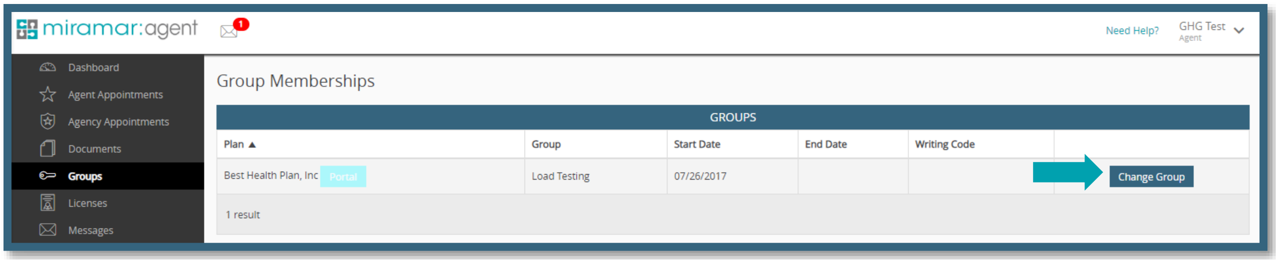


How do I request a group change?

If the group listed for a plan is incorrect and you want to request a group change, you will need to get the Group Code from a plan administrator. Please reach out to your plan and not Miramar:Agent support as the plan has to approve this change.

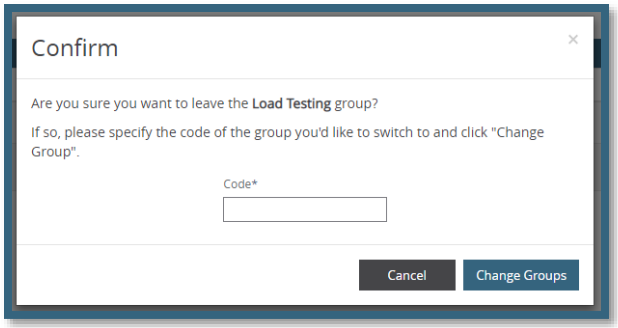
NOTE: The group code is NOT the same as a program registration PIN code. A PIN code is associated with a particular program and group, but a group code can be used to request a group change at any time and is static for that group.

Once you have the Group Code, click **Change Group** next to the group you wish to update.



Once you have clicked Change Group, a confirmation box will pop up on the screen, and you will be required to enter the Group Code. Click **Change Groups** to finalize the request. A green confirmation banner will appear at the bottom of your screen once you have completed the request.

IMPORTANT NOTE: Your request will be sent to a Plan Administrator to process. The group change will only be finalized once the Plan Administrator has approved the request.



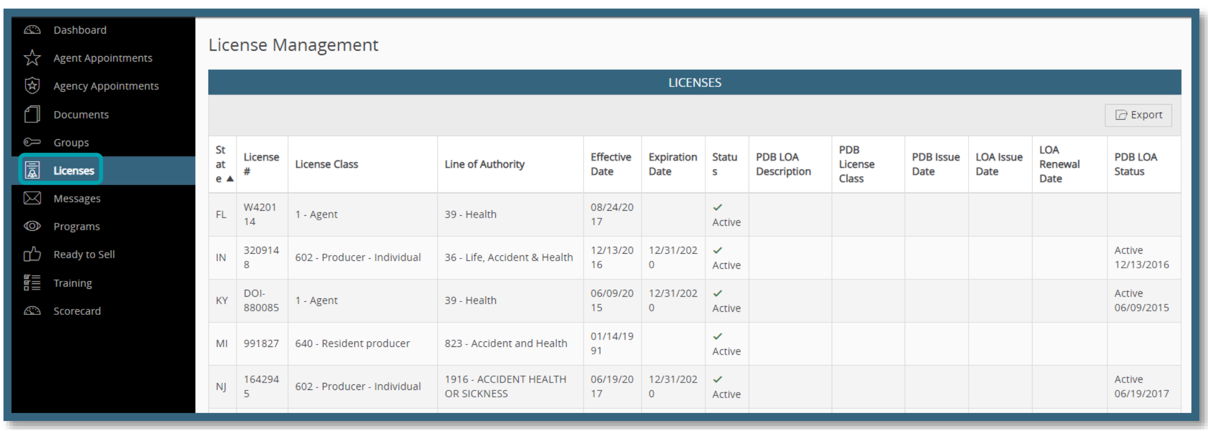
LICENSES

To view your licenses, click **Licenses** in the Dashboard menu to the left of the screen.

IMPORTANT NOTE: License information is refreshed on a daily basis from NIPR for those plans that license appointment services.

You may utilize this index to monitor your licenses and track licenses with upcoming expiration dates. Licenses will show one of the following three statuses:

- Active
- Due Soon
- Expired

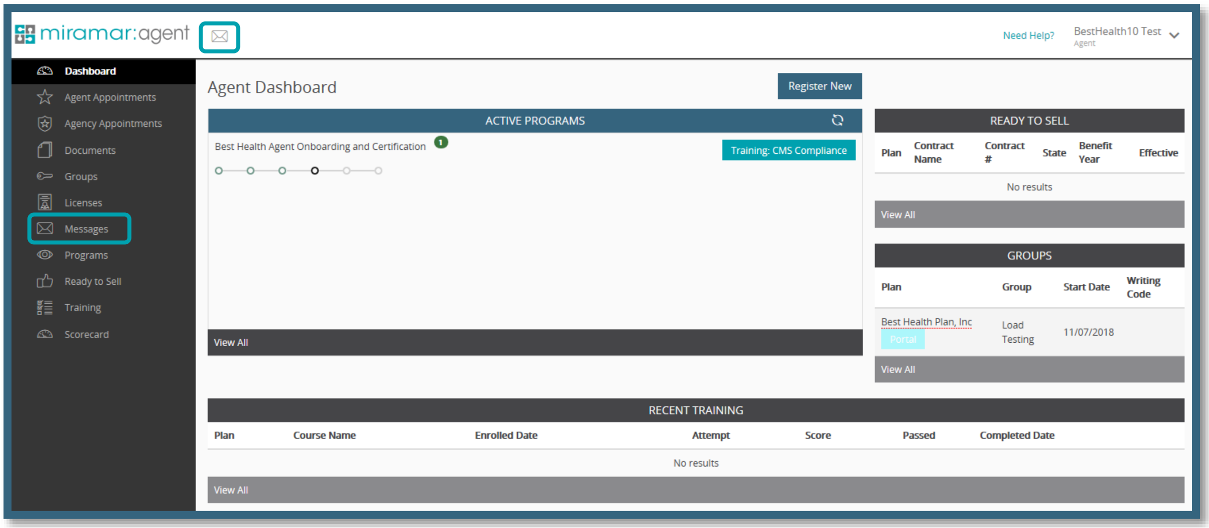


State	License #	License Class	Line of Authority	Effective Date	Expiration Date	Status	PDB LOA Description	PDB License Class	PDB Issue Date	LOA Issue Date	LOA Renewal Date	PDB LOA Status
FL	W420114	1 - Agent	39 - Health	08/24/2017		Active						
IN	3209148	602 - Producer - Individual	36 - Life, Accident & Health	12/13/2016	12/31/2020	Active						Active 12/13/2016
KY	DOI-880085	1 - Agent	39 - Health	06/09/2015	12/31/2020	Active						Active 06/09/2015
MI	991827	640 - Resident producer	823 - Accident and Health	01/14/1991		Active						
NJ	1642945	602 - Producer - Individual	1916 - ACCIDENT HEALTH OR SICKNESS	06/19/2017	12/31/2020	Active						Active 06/19/2017

MESSAGES

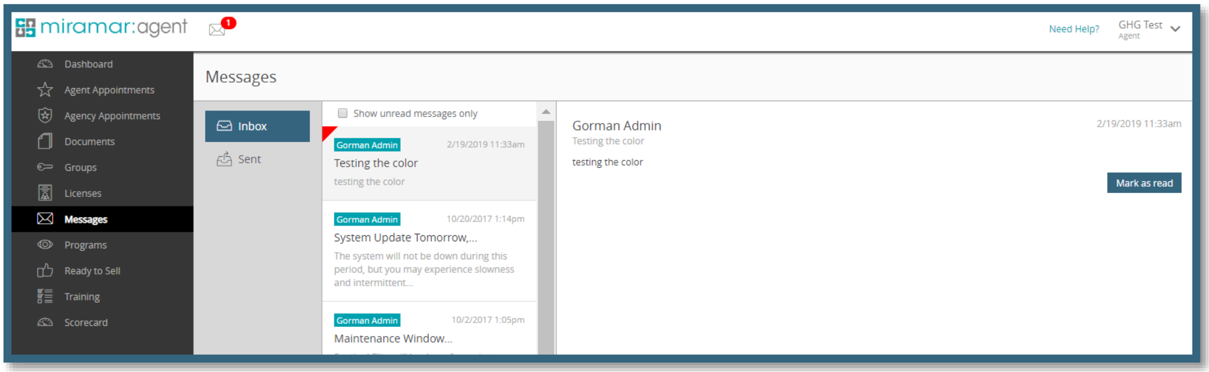
The Messaging Center will be activated when you receive a message. To view your messages that have been sent to or from your plan, click into **Messages** on the Dashboard menu or into the *envelope icon* at the top of the page.

The envelope icon at the top left of the Agent Dashboard will display in a red bubble how many unread messages you have.



From your messaging center, you can mark messages as read by clicking **Mark as read**. You can also sort to only see your unread messages or view your sent messages.

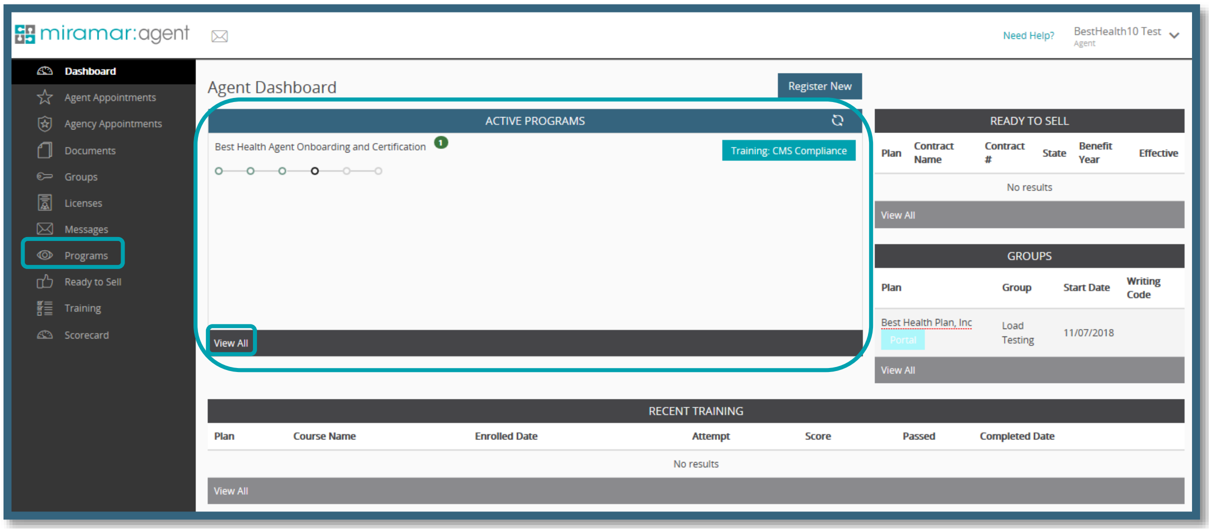
NOTE: Some messages are sent as informational only and will not allow a reply.



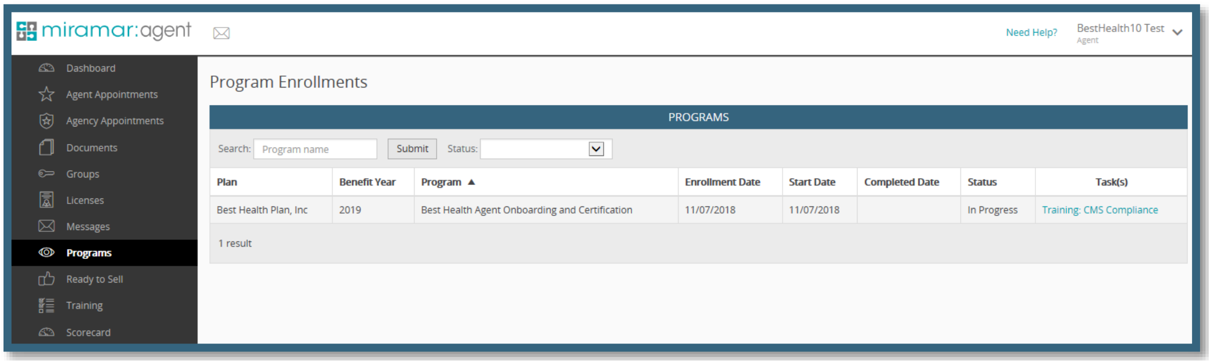
PROGRAMS

The not started and in-progress programs will appear on the Dashboard under *Active Programs*. This is where you will be able to action your program steps.

To view all programs, including completed or frozen programs, click **View All** under the Active Programs widget or **Programs** from the Dashboard menu.



From the *Program Enrollments* index, you can search by program name and filter by program status. From this index, you have insight into when you were enrolled in the program, when you started and completed the program, as well as what your current status is within the program. Additionally, you can action the program by clicking into what is listed in the *Tasks* column.



NOTE: For more information on how to navigate within a program, see the section on *Program Navigation.*

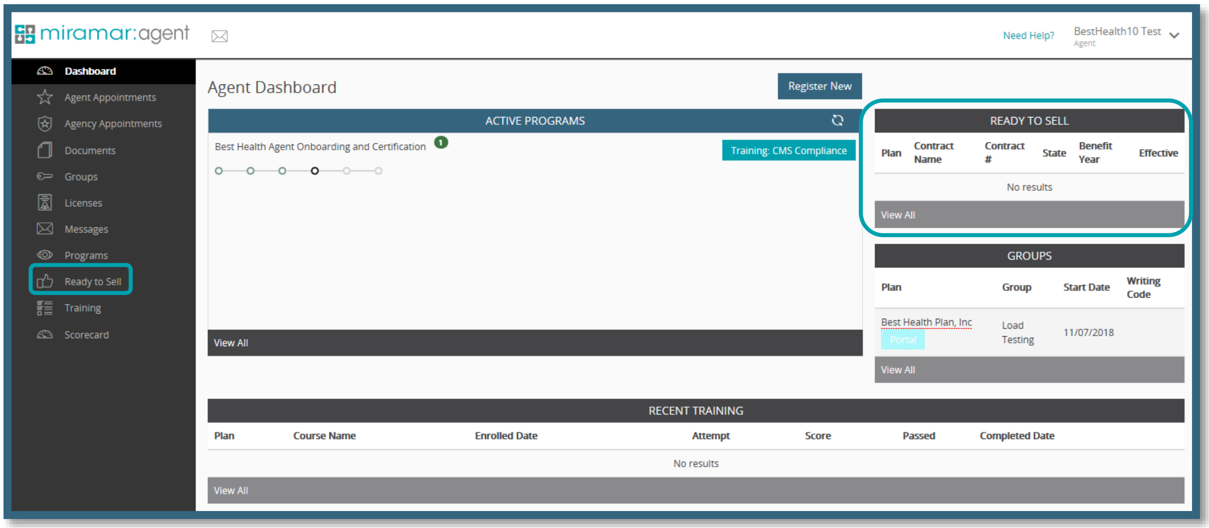
READY TO SELL

To view a snapshot of the contracts for which you are Ready to Sell (RTS) for the current and upcoming benefit, view the *Ready to Sell* widget on the right side of the Dashboard. To view a full RTS history, click into **View All** from the RTS widget or **Ready to Sell** from the Dashboard menu.

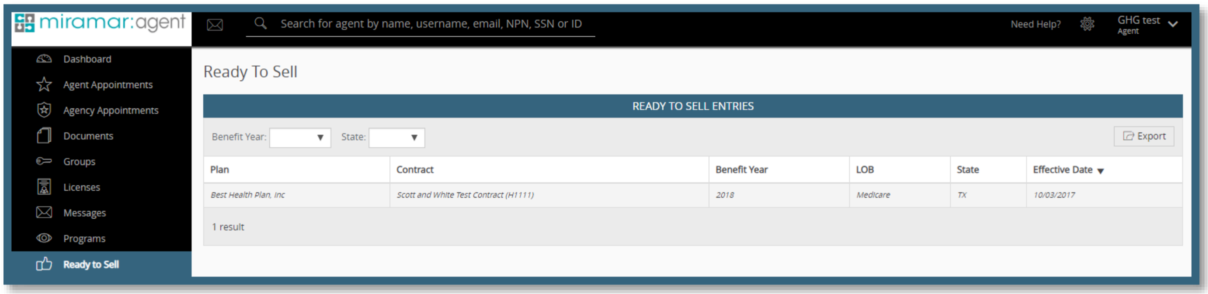
The RTS date is assigned within a program at the point at which required steps are completed as determined by the plan. RTS status is unique for each of the following:

- Plan / Contract
- State
- Benefit Year
- Effective Date

NOTE: Not all plans use the RTS functionality in Miramar:Agent. If this is the case for the plan(s) whose program(s) you have completed, this section of the Agent Dashboard will not have any records.

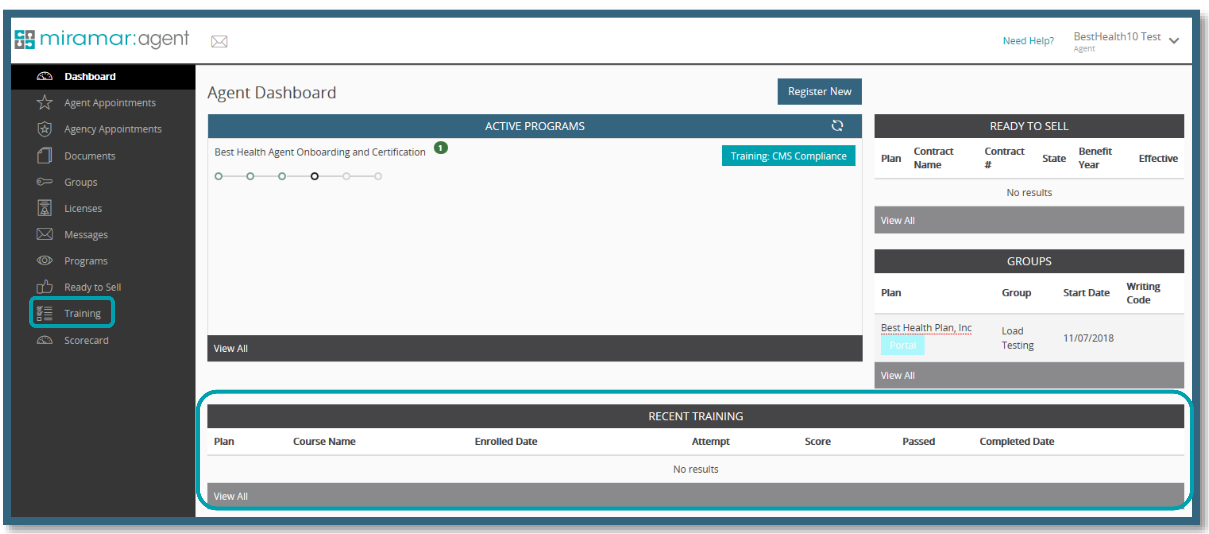


When viewing the RTS page, you are able to search by Benefit Year or State or sort by Plan, Contract, Benefit Year, LOB, State, or Effective Date by clicking the column headings.



TRAINING

To view trainings completed within the last year, view the *Recent Training* widget on the bottom of the Dashboard. To view a full history of your training information, click **View All** from the Training widget or **Training** from the Dashboard menu.



From the Training index, you can search by course name or filter by benefit year or passed status.

Agent Training

AGENT TRAINING

Search: Course name Benefit Year: ▼ Passed: ▼ Export

ID	Benefit Year	Course ID	Course Name	Enrolled Date ▲	Attempt	Score	Completed Date	Passed
9578	2017	580	2017 GHG HIPAA Training	08/27/2016	1	100	08/27/2016	Yes
190050	2018	1936	2018 Core TEST	10/03/2017	1	100	10/03/2017	Yes
190055	2018	1970	2018 Compliance TEST	10/03/2017	1	100	10/03/2017	Yes
190056	2018	1972	2018 FWA TEST	10/03/2017	1	100	10/03/2017	Yes

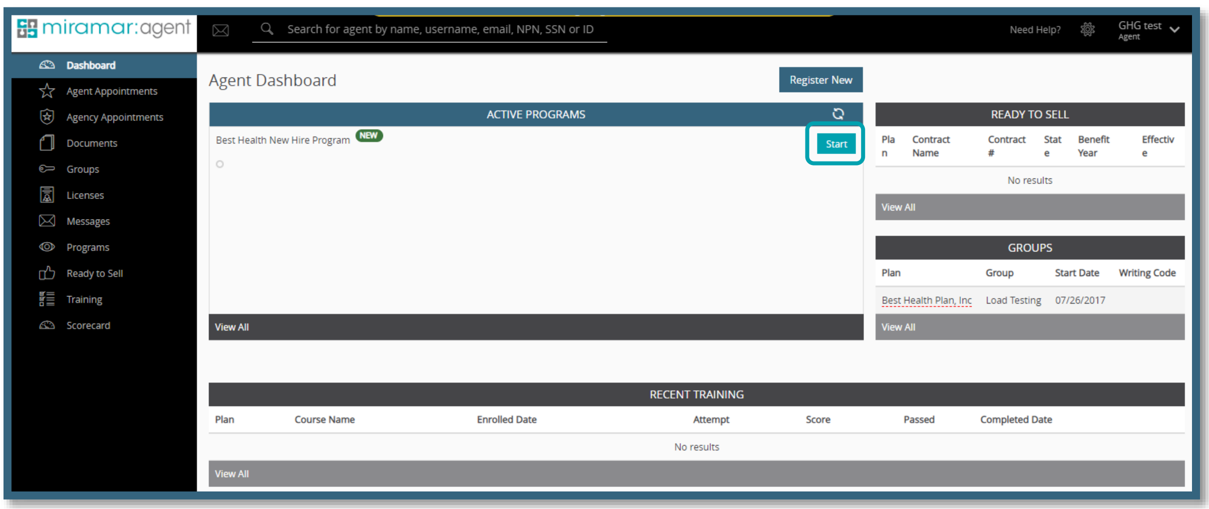
4 results

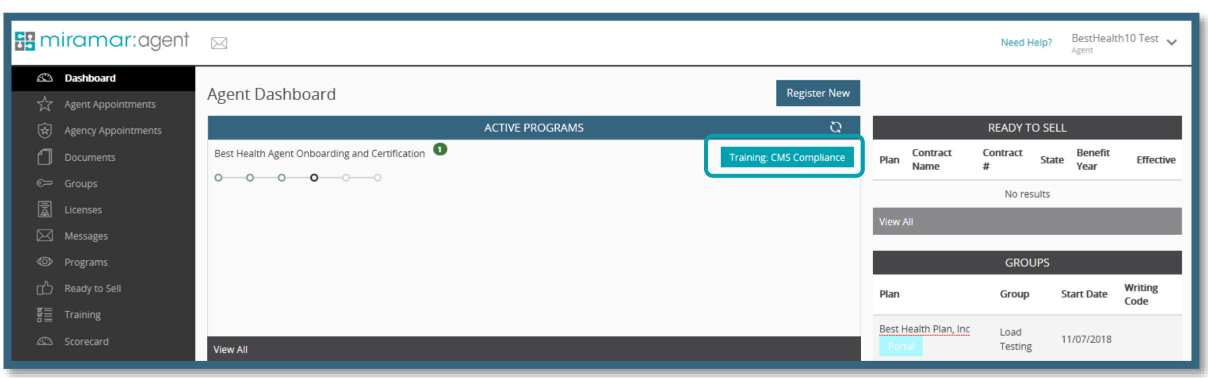
IV. PROGRAM NAVIGATION

To take action in an active program, go to the Active Programs widget located at the top of the Agent Dashboard.

To the right of the program name, you will see a green button indicating the next action required. If you have not yet started the program, click the green **Start** button to begin the program.

NOTE: If there are actions listed but no green button, this means there are no agent-facing steps for you to complete. The program is waiting for outside information such as plan administrator action, document review, appointment confirmation, background check results, etc. Please check back regularly to see if you have any actionable steps until the program is complete.

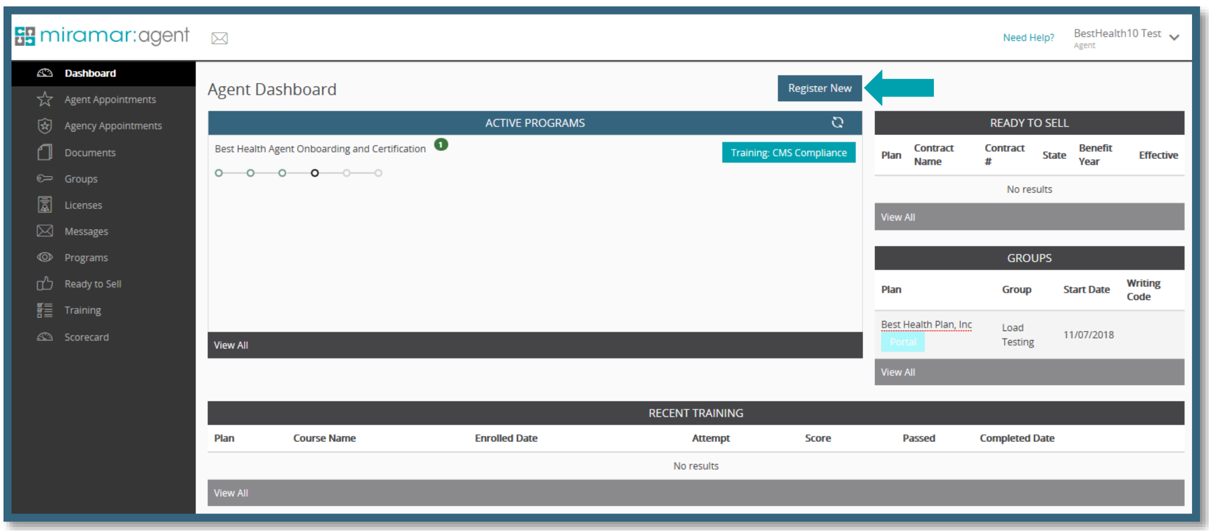




How do I register for a program using a registration PIN code?

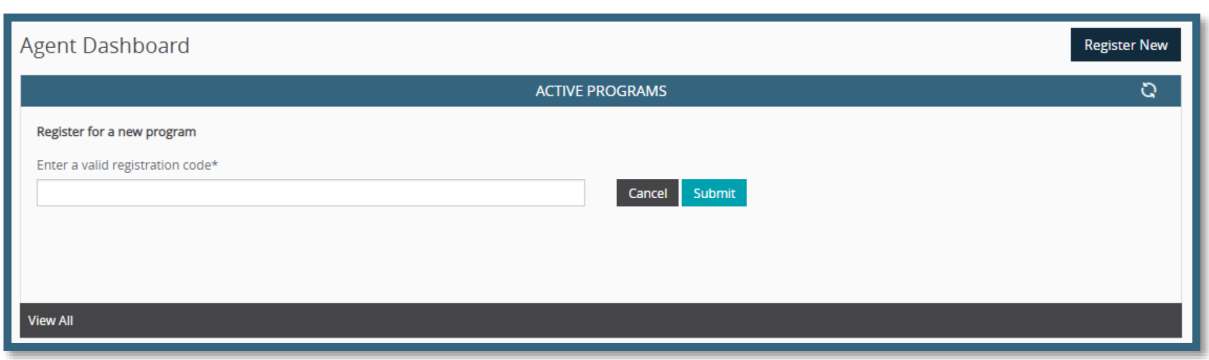
Some organizations may pre-enroll you in programs, in which case you will see the program in your active programs list with a *Start* button.

If you were provided a program registration PIN code by your plan or upline, you can register by clicking the **Register New** button at the top of your screen.

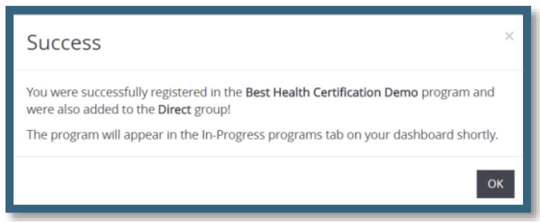


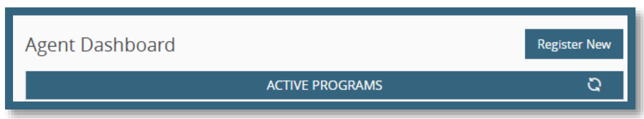
Once you click *Register New*, you will be prompted to enter the program registration PIN code provided by your plan or upline. Click **Submit** to complete the registration. PIN codes are not case sensitive.

IMPORTANT NOTE: If you do not have the registration PIN code for the program you need to complete, please contact your plan or direct upline to obtain one. Miramar:Agent customer support does not provide registration codes.



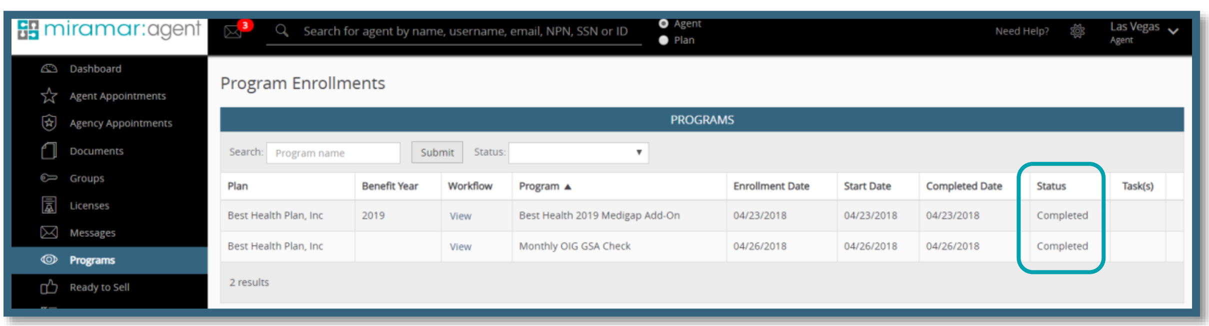
The following screen will pop up to show you have registered successfully. After clicking **OK**, you can click the *refresh icon* in the top right corner of the Active Programs widget to see the new program on your dashboard.





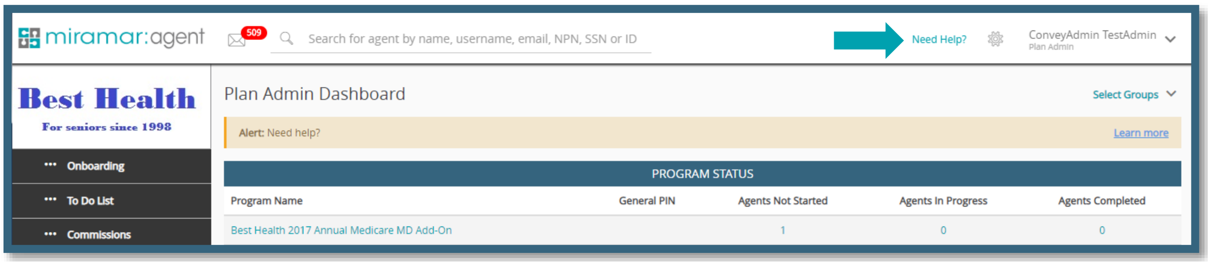
How do I know if I have completed a program?

You may find that when you log in to your agent dashboard, a program you had previously been working on is now no longer showing on the dashboard. This most likely means you have completed the program. To verify, click **Programs** from your dashboard menu to see the status of your program.



V. MIRAMAR:AGENT KNOWLEDGE BASE

To access the Miramar:Agent Knowledge Base, go to https://convey.na2.teamsupport.com/dashboard or click **Need Help?** from the top of any Miramar:Agent page.



Frequently asked questions and helpful training tips for agents can be found without logging in by clicking on the **Miramar:Agent** logo in the middle of the main landing screen. No login is required to view documents housed on the Knowledge Base for Agents.