



**Clear Spring  
Health**



**Community  
Care Alliance**

of Illinois - Medicare Advantage  
an affiliate of **Clear Spring  
Health**



**Eon  
Health**

an affiliate of **Clear Spring  
Health**

# Overview

- Login
- Enter new leads
- Start and enter applications
- Enrollment Form Process
- Manage sales leads
- Update sales statuses
- Set follow ups and appointments
- Literature Requests



# Welcome to Cirrus

The Clear Spring Health-Cirrus web tool is designed to assist agents in tracking the progress of all leads and enrollments, which ensures that they are properly assigned and managed in a timely manner. The Cirrus pipeline allows the agent to stay up-to-date on follow up opportunities and effortlessly view enrollment statuses.

To ensure you receive credit for your enrollments, please ensure you enter your electronic applications through this site!

Thank you and welcome to the CSH Key Partner Program!

Matt Post, Sr. VP of Sales and Marketing



# Cirrus Login

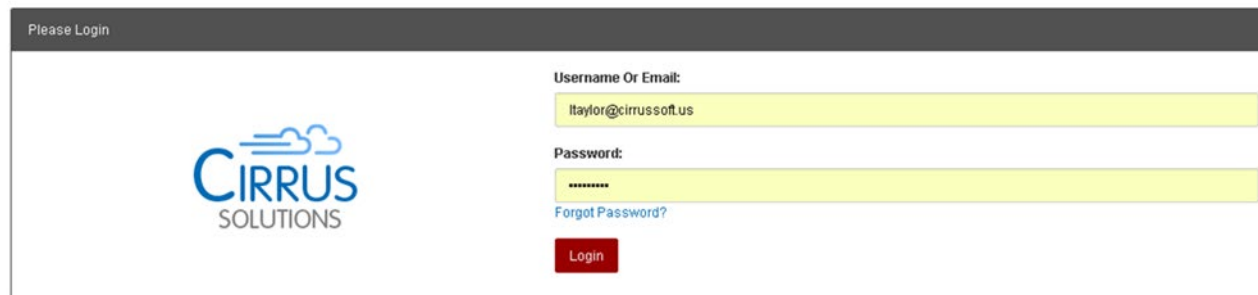
Your training has been completed and its time to start selling. You will receive an email with your username, password, and a link to the plan you are selling for.

Follow the link provided and the screen shown will be seen.

The first time you log in, you will be required to reset your password.

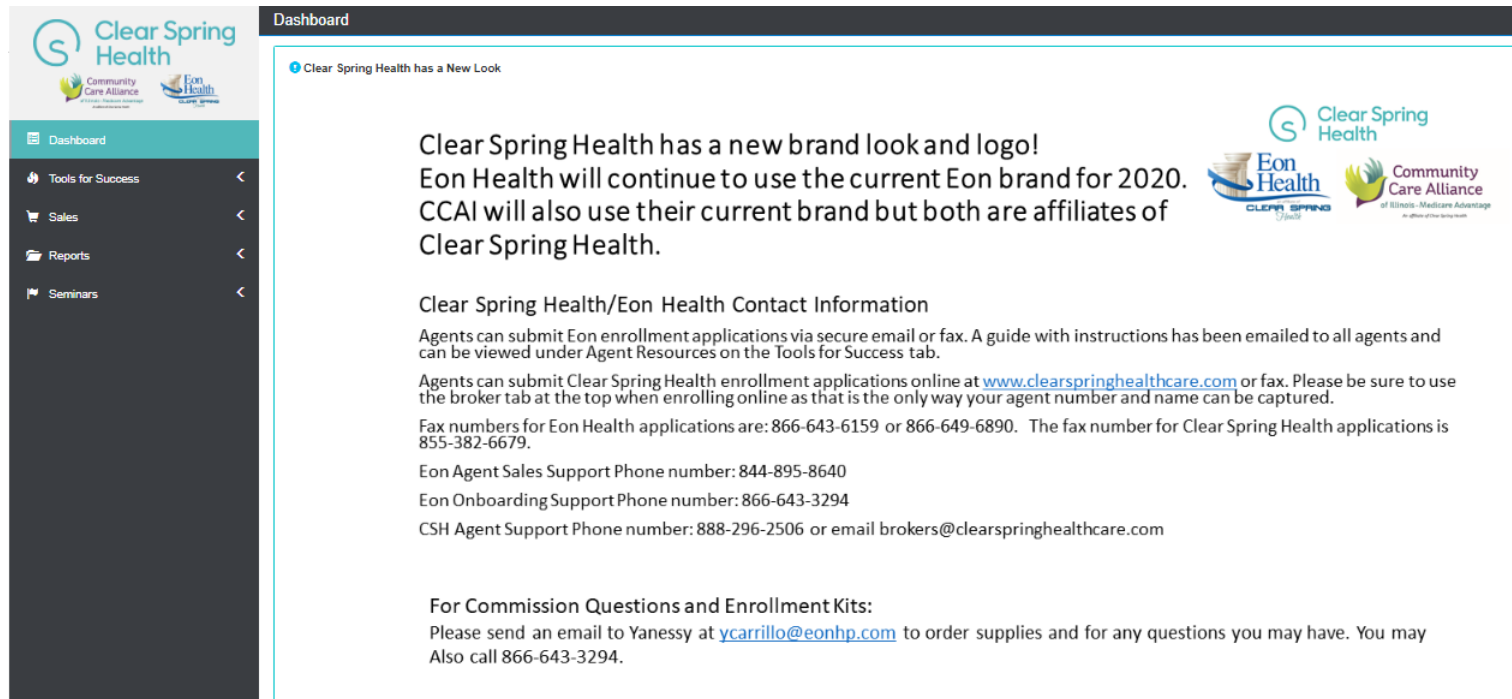


Please Login



The screenshot shows a login page for Cirrus Solutions. On the left is the Cirrus Solutions logo. On the right, there are two input fields: 'Username Or Email' with the value 'ltaylor@cirrussoft.us' and 'Password' with masked characters. Below the password field is a 'Forgot Password?' link and a red 'Login' button.

# Home Page



The screenshot shows a web dashboard for Clear Spring Health. At the top left is the Clear Spring Health logo, which includes the text 'Clear Spring Health' and 'Community Care Alliance' with 'Eon Health' below it. A dark navigation bar at the top contains the word 'Dashboard'. Below this is a teal sidebar menu with the following items: 'Dashboard', 'Tools for Success', 'Sales', 'Reports', and 'Seminars'. The main content area has a dark header with the text 'Clear Spring Health has a New Look'. The main body contains a large announcement: 'Clear Spring Health has a new brand look and logo! Eon Health will continue to use the current Eon brand for 2020. CCAI will also use their current brand but both are affiliates of Clear Spring Health.' To the right of this text are three logos: Clear Spring Health, Eon Health, and Community Care Alliance. Below the announcement is a section titled 'Clear Spring Health/Eon Health Contact Information' with several paragraphs of text providing contact details for agents, including phone numbers and an email address. At the bottom, there is a section for 'Commission Questions and Enrollment Kits' with an email address and phone number.

Clear Spring Health has a New Look

Clear Spring Health has a new brand look and logo!  
Eon Health will continue to use the current Eon brand for 2020.  
CCAI will also use their current brand but both are affiliates of  
Clear Spring Health.

Clear Spring Health/Eon Health Contact Information

Agents can submit Eon enrollment applications via secure email or fax. A guide with instructions has been emailed to all agents and can be viewed under Agent Resources on the Tools for Success tab.

Agents can submit Clear Spring Health enrollment applications online at [www.clearspringhealthcare.com](http://www.clearspringhealthcare.com) or fax. Please be sure to use the broker tab at the top when enrolling online as that is the only way your agent number and name can be captured.

Fax numbers for Eon Health applications are: 866-643-6159 or 866-649-6890. The fax number for Clear Spring Health applications is 855-382-6679.

Eon Agent Sales Support Phone number: 844-895-8640  
Eon Onboarding Support Phone number: 866-643-3294  
CSH Agent Support Phone number: 888-296-2506 or email [brokers@clearspringhealthcare.com](mailto:brokers@clearspringhealthcare.com)

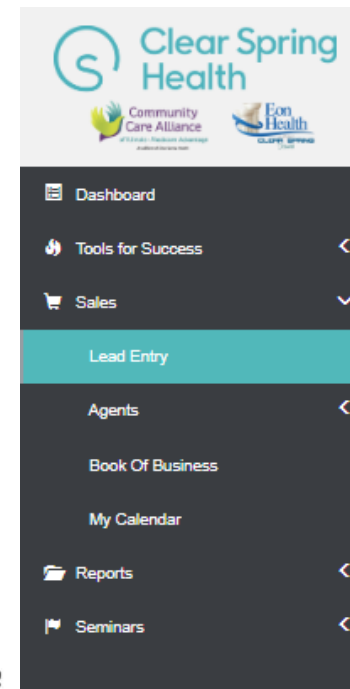
For Commission Questions and Enrollment Kits:  
Please send an email to Yanessy at [ycarrillo@eonhp.com](mailto:ycarrillo@eonhp.com) to order supplies and for any questions you may have. You may Also call 866-643-3294.



Once you have logged in your customized home screen will generate. This **Dashboard Menu** will be located on the left hand side of your screen.

# Sales and Starting an Application

- **Lead entry**, located underneath the **Sales Tab**, is used to create a new lead or enter a new application.
- When entering a new lead, complete the following:
  - First Name
  - Last Name
  - Phone Number
  - Account Number



Enter First AND Last names, Phone number, or BRC to continue.

First Name

Last Name

Phone

Account #



# Lead Entry Results

If the lead is already in the system it will generate under **Results**.

Click **Open** on the account you are searching for.

\*\*Do not create duplicates.

Enter First AND Last names, Phone number, or BRC to continue.

First Name	Last Name	Phone	Account #
<input type="text" value="james"/>	<input type="text" value="smith"/>	<input type="text" value="( )_-"/>	<input type="text" value="(BRC)"/>

## Results

The following beneficiary record(s) matched provided parameters. Click open to use access existing record.

First	Mid	Last	Phone	Address	Bucket	
James		Smith	(478)491-9999	900 W Elm Street , Milledgeville, GA 31061	Followup	<input type="button" value="Open"/>
James		Smith	(803)943-1111	4529 Sesame St. , Varnville, SC 29944	Declined - No Response	<input type="button" value="Open"/>



# Lead Entry/Add a New Beneficiary

- If no results generate, fill in the lead information and source then click **Go!**
- The screen shown will appear. Complete the following fields:
  - Address 1 (permanent)
  - Zip code
  - Email (Optional)
  - Date of Birth
  - Current Coverage
  - Medicare A & B eligible
  - ESRD Y/N
  - Consent Level
  - Notes (if needed)

Sales / Lead Entry / Add New Beneficiary

Welcome Lanelle Taylor

New Search Search Results

Campaign Type: Agent Generated  
Campaign Name: Agent Generated 2018

Add POA

First Name \* Middle Name  
[ ] [ ]

Last Name \* Suffix Date Of Birth  
[ ] [ ] [ ]

Phone \*  
(000)-000-0000  
 No Phone Provided

Mobile Phone  
(000)-000-0000

Language Preference \*  
English

Address 1 \*  
[ ]

Response Type: Agent Generated

Email  
[ ]

Current Coverage  
(Choose an option)

Medicare A&B Eligible? \*  No  Yes

End Stage Renal Disease? \*  No  Yes

Medicaid Eligible? \*  No  Yes

Eligible For CSNP? \*  No  Yes

Consent Level \*  
(Choose an option)

Notes  
[ ]





# Entering an Application

- Search for the lead.
- Click on the lead's name and their account will generate.
- Click the **Enroll** button on the upper right hand side of the screen.

**\*\***The application will load and Cirrus will take the agent throughout the entire application.

Test Tester	<a href="#">Edit Lead</a> <a href="#">+</a>
Address	123 Tester Lane Batesburg, SC 29006 Saluda
Phone	(305)878-0156
Email	
Language	English
Current Coverage	Other
Medicare A&B	Yes
ESRD	No
Medicaid	No
CSNP Eligible	No
Primary Campaign	TEST <a href="#">✓</a>
Assigned agent	Unassigned <a href="#">☰</a>
Agent Organization	
Consent Level	Do not Contact

Sales				
Appointment: none	<a href="#">Set Appointment</a> <a href="#">Set Follow-up</a>			
Follow-up: none	<a href="#">Reserve Seminar</a> <a href="#">Enroll</a>			
Sales Status	<a href="#">Closed - Duplicate</a> <a href="#">Edit</a> <a href="#">Add Note</a> <a href="#">Send Literature</a> <a href="#">Add Documents</a>			
Uploaded documents				
File name	Type	Date Added	User Added	
No matching records found				



# Enrollment Form Process

## 1. Enrollment Form

Complete the following section:

1. Medicare advantage Plan Choice
2. Personal Information
3. Primary Care Provider (PCP) Information
4. Medicare Information
5. Please read and answer these questions
6. Payment Options
7. Enrollment Agreement
8. Attestation of Eligibility for an Enrollment Period
9. Digital Signature

**\*\*Verify the Agent information is correct and click “Submit My Application” once everything is filled out.**



# Enrollment Form Process

## 2. Uploading Scope of Appointment and Enrollment Form

After the application has been entered:

- Upload the scope of appointment and the enrollment form
- Include all supporting documents at this time
  - This will include a paper check if the client has selected EFT for their payment option.



# Enrollment Form Process

## 3. Update Page

Once a lead enrolls in the plan and is accepted, the Sales Status will say **Enrl Accepted**.

When you see that status, you will know that the lead is already enrolled.



Sally Smith [Edit Lead](#) [+](#)

**Address** 900 W. Sally Street  
Apt 1213  
Milledgeville, GA 31061 Baldwin

**Phone** (561)222-2222

**Email**

**Language** Other

**Current Coverage** United Healthcare

**Medicare A&B** No

**ESRD** No

**Medicaid** No

**CSNP Eligible** No

**Primary Campaign** 2017 SEP RBS DM 3 (Cirrus) [✎](#)

**Assigned agent** Unassigned [👤](#)

**Agent Organization**

**Consent Level** Do not Contact

**Sales**

Appointment: none [Set Appointment](#) [Set Follow-up](#)  
Follow-up: none [Reserve Seminar](#) [Enroll](#)

**Sales Status**

Enrl Accepted [Edit](#) [Add Note](#) [Send Literature](#) [Add Documents](#)

**Uploaded documents**

File name	Type	Date Added	User Added
No matching records found			

# Sales Status

Once you submit an application into Cirrus, check back within 48 hours to ensure it was processed. Status could show **Enrl Pending, Enrl Accepted** or **Incomplete**. If the status is incomplete, take the following steps:

1. Read the note to see why the application is incomplete.
2. Go in and make the change and/or add information.
3. After saving go to the sales status bar and click on the **App Received by Agent** and enter a few words of explanation in to the notes section.
4. Click **Save**.

Check your Book of Business to determine if there are any incomplete applications. Incomplete enrollment forms should be resolved **within 48 hours**.



# Permission to Contact

This gives the Agent the ability to create the permission to **Contact** the prospect. If the person does not want to be contacted, their lead should remain as **Non-Consent**.

Consent Level \*

(Choose an option) ▲

|

Appointment

Contact Only

Do not Contact

Non-Consent

Seminar



# Follow-up Dates

To set a reminder on your calendar to follow-up with your client at a later date click on **Set Follow-Up** on the lead screen. Then, you will need to fill in the appointment time and date. A note is also required before you click **“Save”**.

Sales

Appointment: none  
Follow-up: none

[Set Appoint](#) [Set Follow-up](#)  
[Reserve Seminar](#) [Enroll](#)

Sales Status

In Progress [Edit](#) [Add Note](#) [Send Literature](#) [Add Documents](#)

Uploaded documents

File name	Type	Date Added	User Added	
No matching records found				



# Follow-up Dates

Once you have saved your entry a note will appear below with the history section showing when your follow-up is scheduled.

The date and time will also appear below the sales status, below Appointment.

Appointment: none

Follow-up: 02/06/2018 10:00 AM ✖



Set Appoint

Set Follow-up

Reserve Seminar

Enroll

## Sales Status

Followup

Edit

Add Note

Send Literature

Add Documents





# Setting an Appointment

When booking an in-person appointment to go over benefits with a beneficiary, you will need to go into their lead and select **Set Appoint**.

Per CMS regulations, a Scope of Appointment (SOA) is required 48 hours prior to the appointment. The date the SOA was obtained and the appointment date and time need to be entered into the lead. Include a note and click **Save**.

Appointment: none

Follow-up: none

Set Appoint

Set Follow-up

Reserve Seminar

Enroll

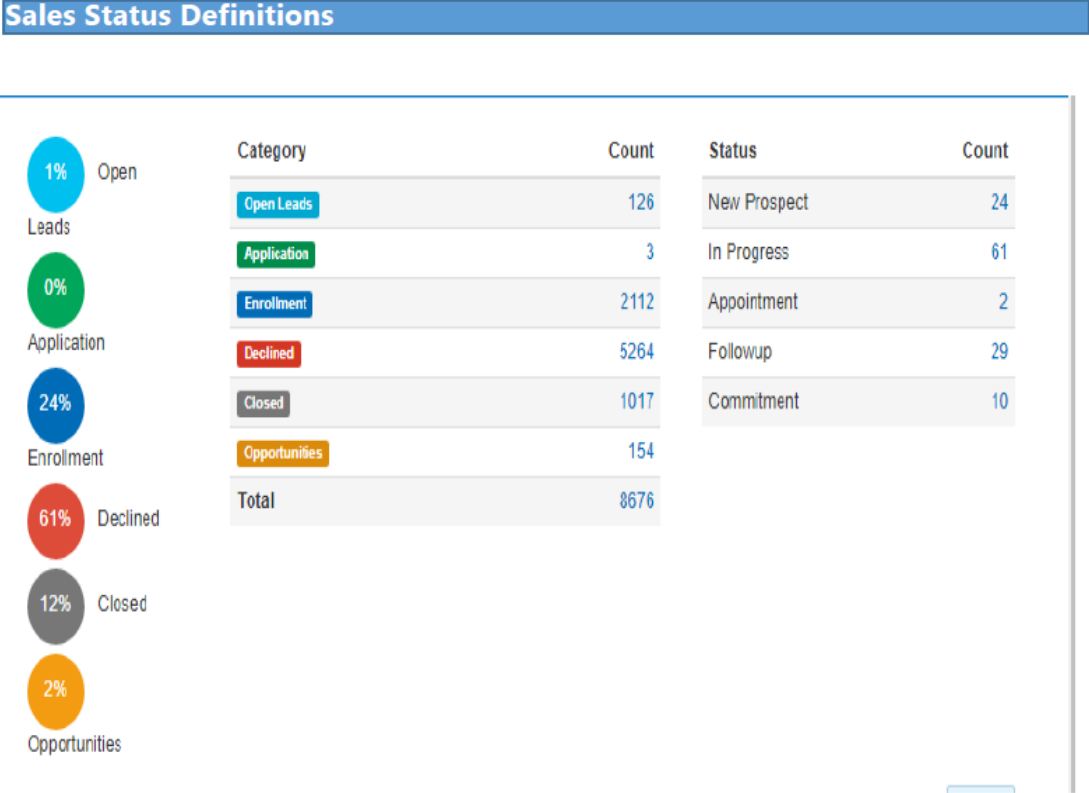


# Sales Status Definitions

**New Prospect-** Leads assigned as they are entered in Cirrus will show in this section.

**Appointment-** An agent enters a lead and changes the status to appointment. Once a time and date have been saved, the lead will move to the appointment bucket.

**Follow-up-** Set your follow-up date here to contact the beneficiary.

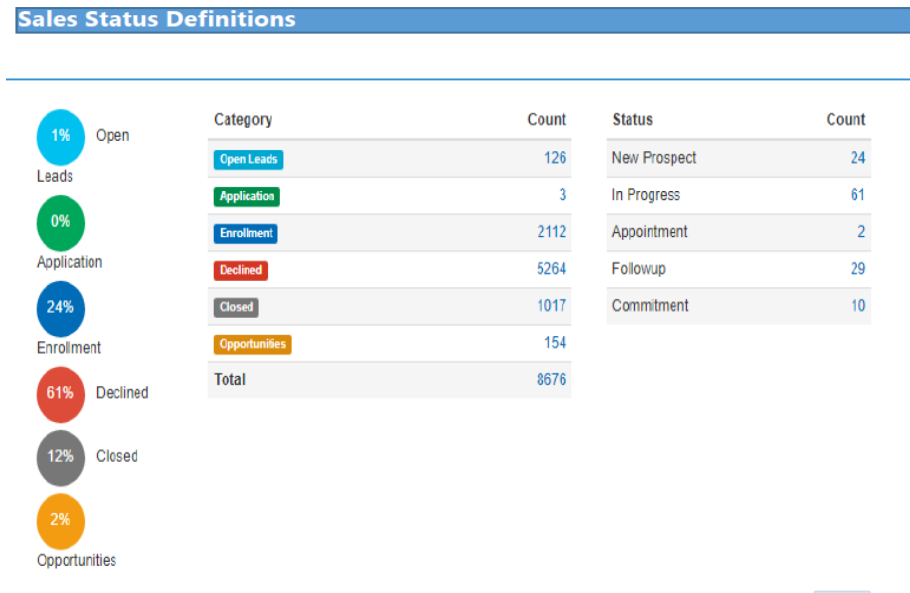


# Sales Status Definitions

**Commitments-** This status is chosen for a beneficiary who has indicated they are enrolling and has committed to you as their Agent.

**Declined-** Any time you change a lead's status to declined it will be in this section.

**Closed-** When a lead's status is changed to “do not contact” or “deceased” or “duplicate” they will show in this section.



# Sales Status Definitions

**2020 AEP-** Any beneficiary that requests information for the following AEP October 15<sup>th</sup>-December 7<sup>th</sup>.

**Aging-in-** This is a lead that will not be enrolling for at least three months.

**Seminars-** Agents can see the number of prospects and members that have been booked into their seminars.

**Apps Rec'd by Agent-** Applications processed by the Agent once entered into the system, but have not been verified by enrollment yet.

**App Received by HP-** Enrollments that have not been audited by the enrollment team yet.



# Sales Status Definitions

- **Enrl Accepted** – An Agent’s book of business (members assigned to them) is reflected in this section. Applications loaded into the enrollment system and sent to CMS.
- **Enrl Denied** – Applications denied by the enrollment department or CMS.
- **Enrl Incomplete** – Applications that are rejected by enrollment due to an error will show in this section.
- **Enrl Incomplete Resolved** – All resolved applications that have been corrected need to be marked Incomplete Resolved. That will notify the enrollment department that they can continue to process the application.
- **Non-Consent** – Leads that do not want to be contacted. Agents cannot contact anyone in this section by phone. They can only be contacted in writing.

Status	Count
Enrl Incomplete	1
Enrl Pending CMS	5
Enrl Accepted	894
Enrl Denied	50



# Lead Screen Tabs



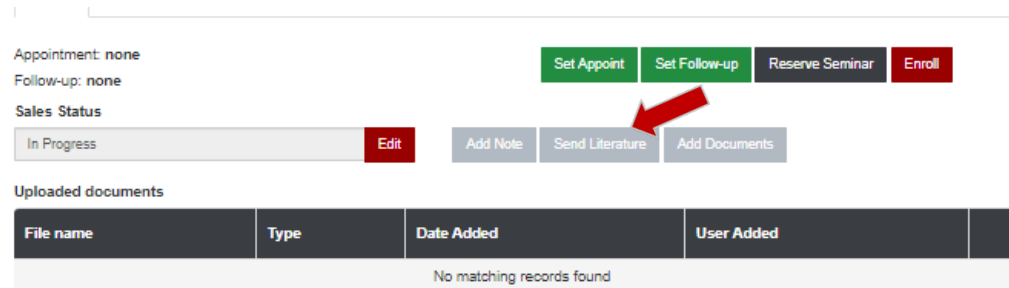
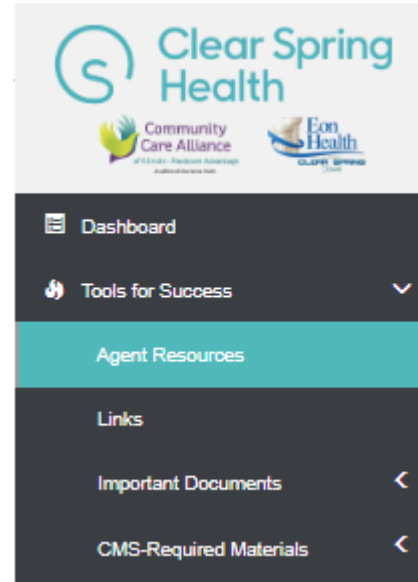
- **Sales Notes**- Agents should enter a general note in the system each time contact is made with the prospect or member including a summary of the call.
- **Application History**- This tab will only show once an enrollment application is entered.
- **Enrollment Transactions**- You can see all of the CMS transactions with the enrollment application on this tab.
- **Uploaded Documents**- When you upload your SOA and enrollment form, you will see them here.
- **Audit Trail**- Whenever a note is placed in the system or a re-assignment occurs, the Cirrus system will notate who made the change and when.



# Literature Requests

Enrollment Kits can be ordered through the Shopping Cart, under Tools for Success – then Agent Resources

You can also request literature to be sent directly to a prospect by clicking the Send Literature button on the lead profile page.





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