Cirrus Tool Training

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

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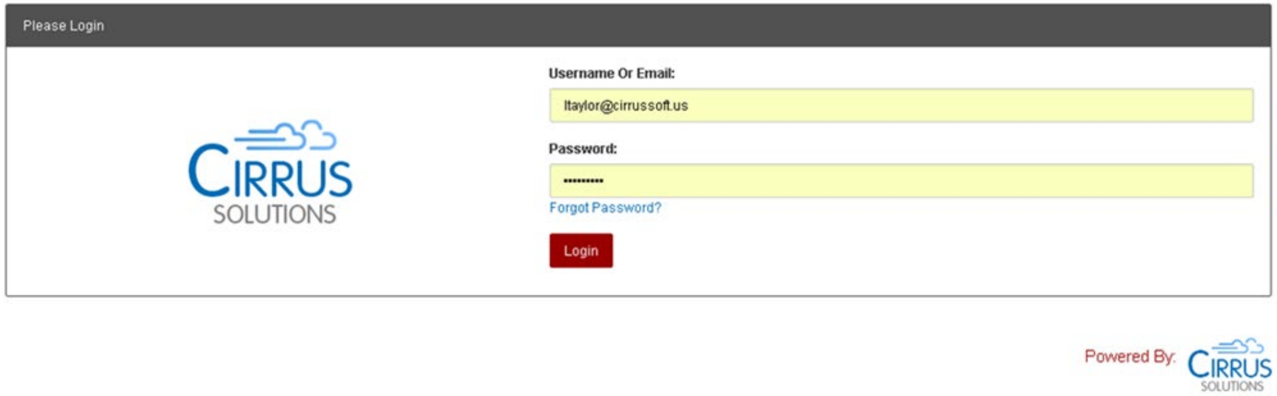
Cirrus Login

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.



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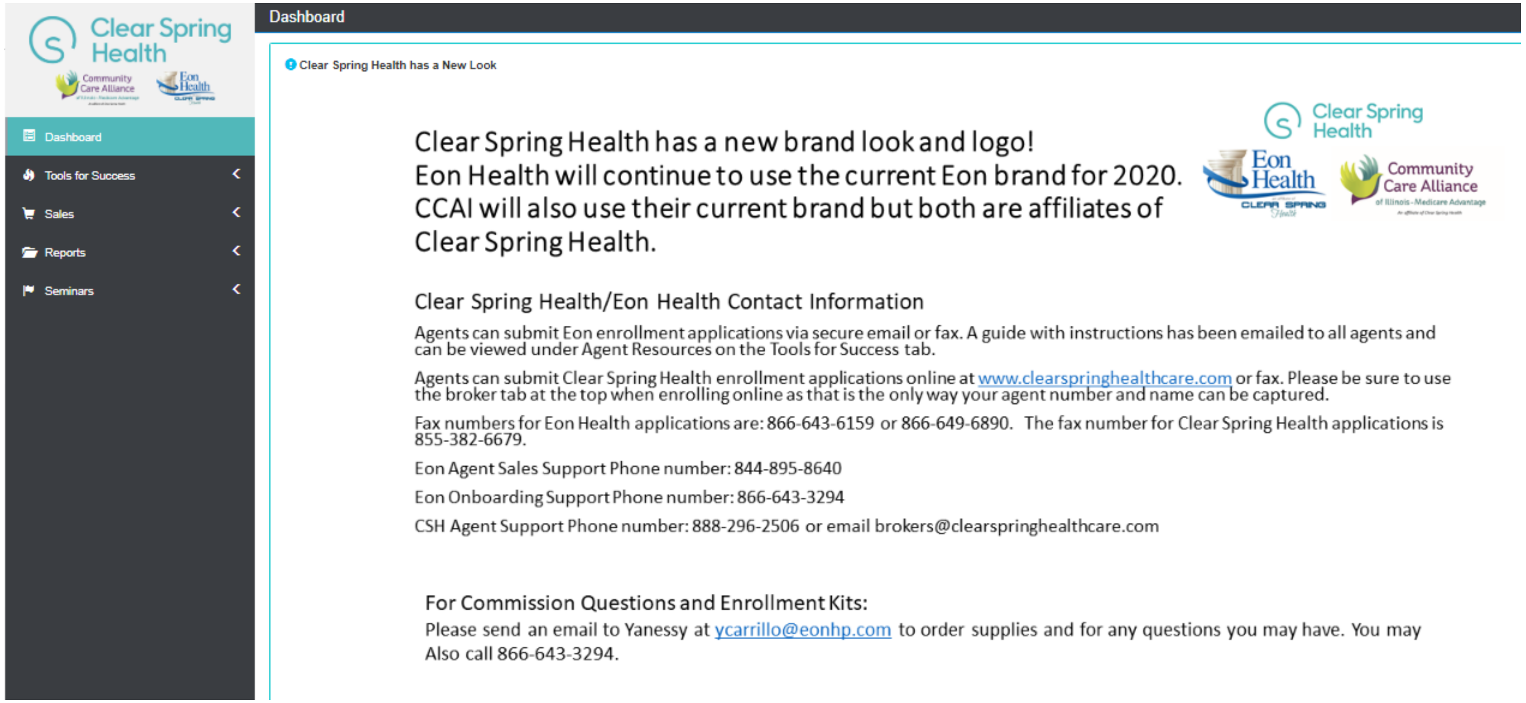
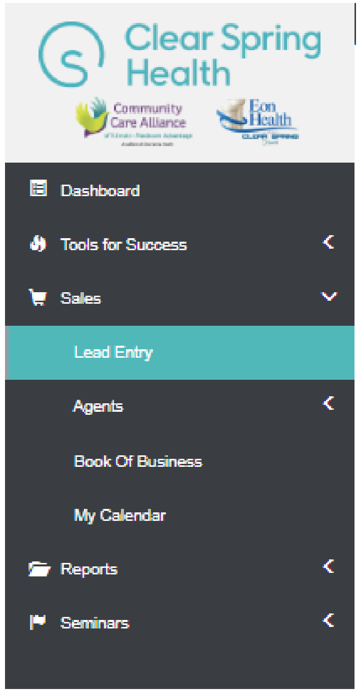
Home Page

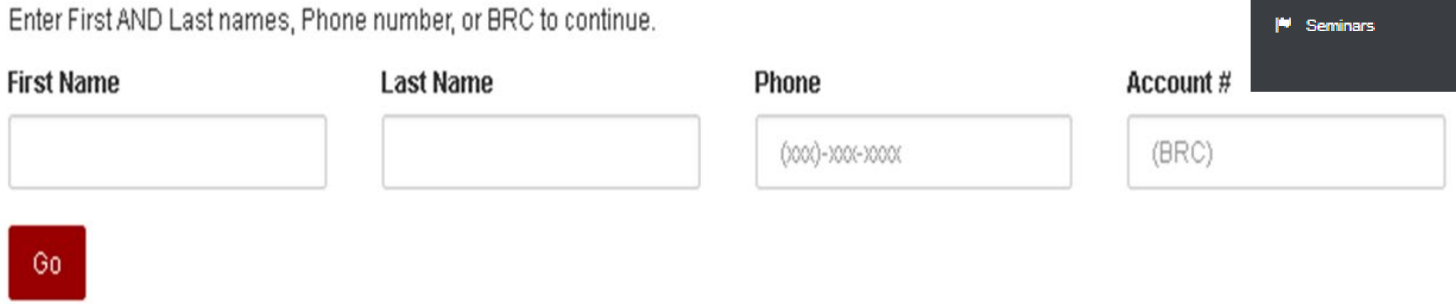


Once you have logged in your customized home screen will generate. This **Dashboard Menu** will be located on the left hand side of your screen.

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



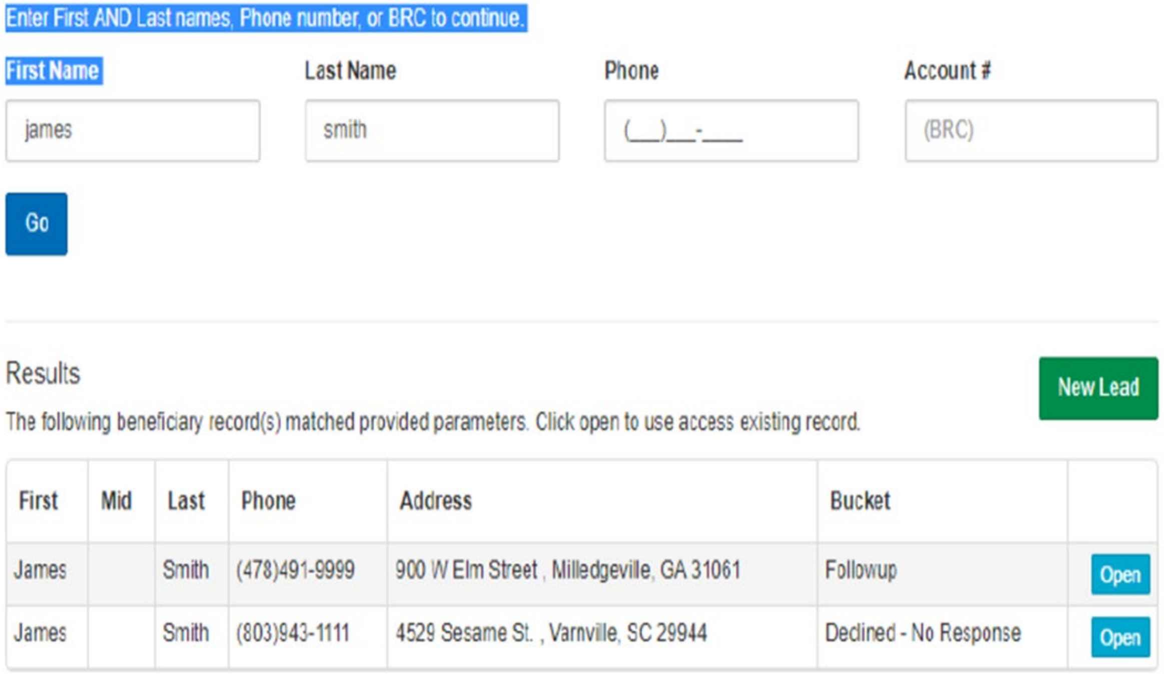


Lead Entry Results

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: james | Last Name: smith | Phone: (__)__-___ | Account #: (BRC)

Go

Results

New Lead

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	Open
James		Smith	(803)943-1111	4529 Sesame St. , Varnville, SC 29944	Declined - No Response	Open

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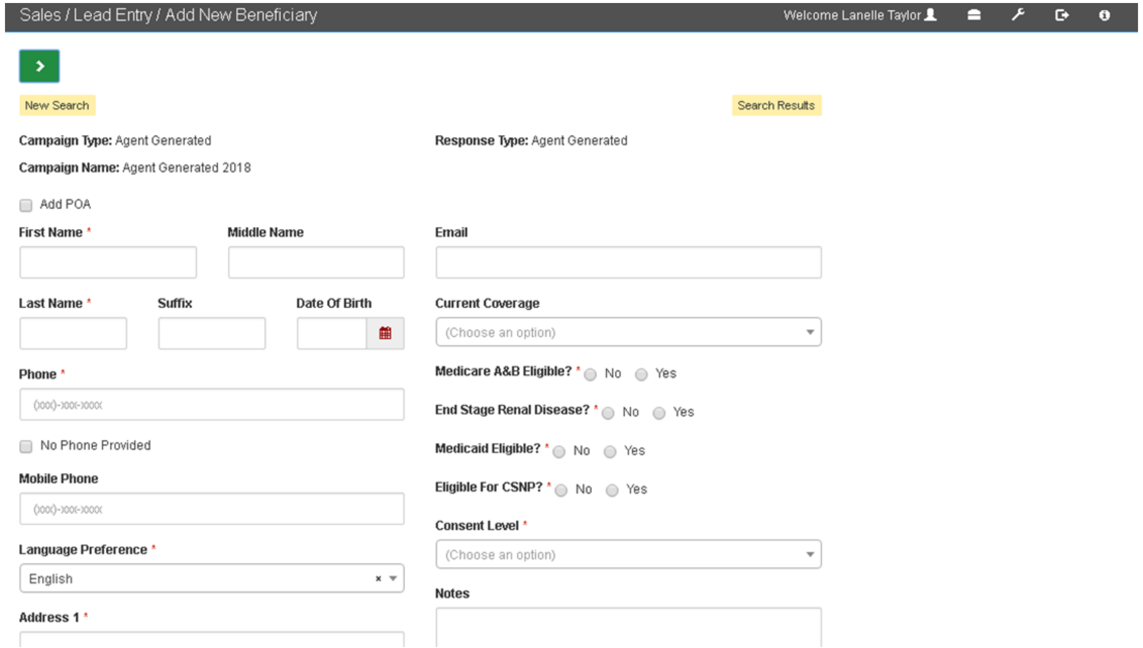
Lead Entry/Add a New Beneficiary

- 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)



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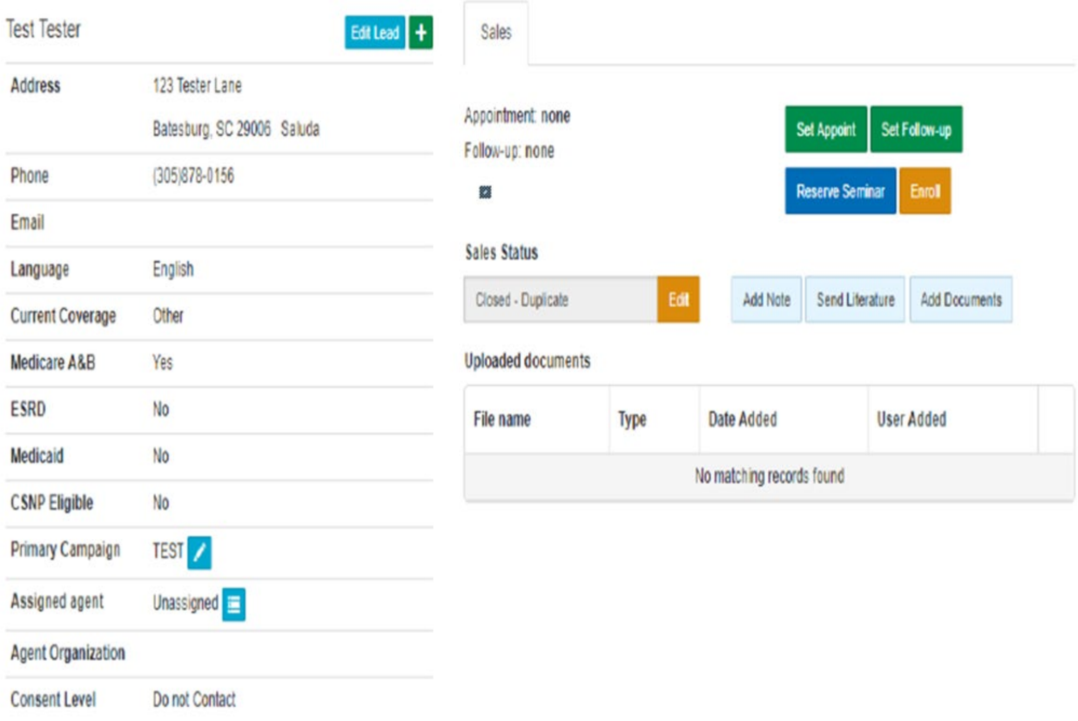
Entering an Application

- 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.



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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.

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Enrollment Form Process

2. Uploading Scope of Appointment and Enrollment Form

After the application has been entered:

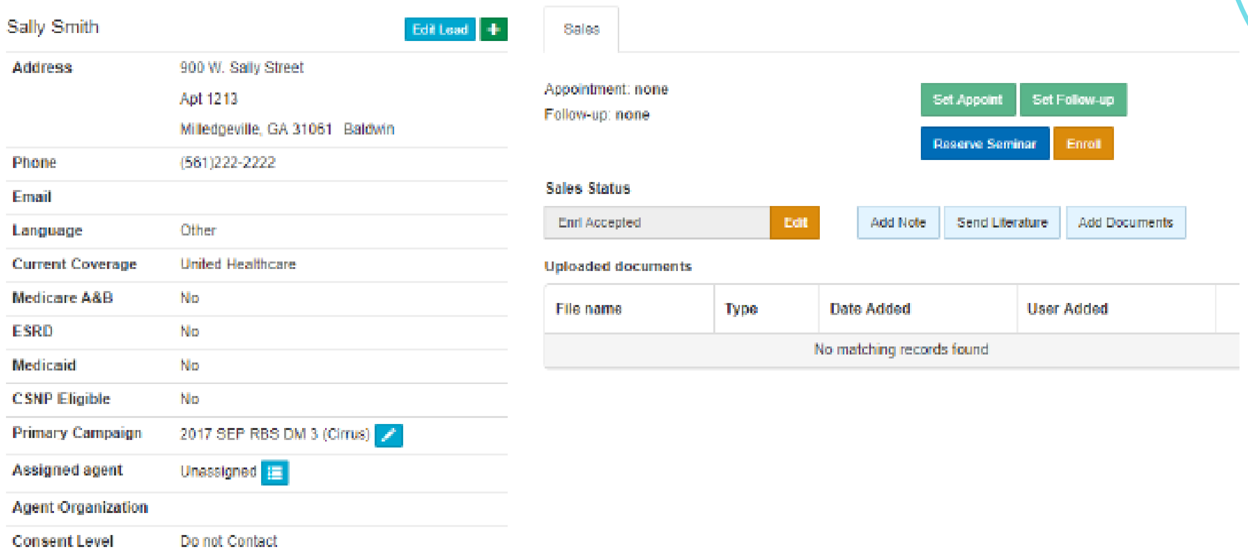
- Upload the scope of appointment and the enrollment form
- Include all supporting documents at this time
  - This will include a paper check if the client has selected EFT for their payment option.

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.



Sales Status

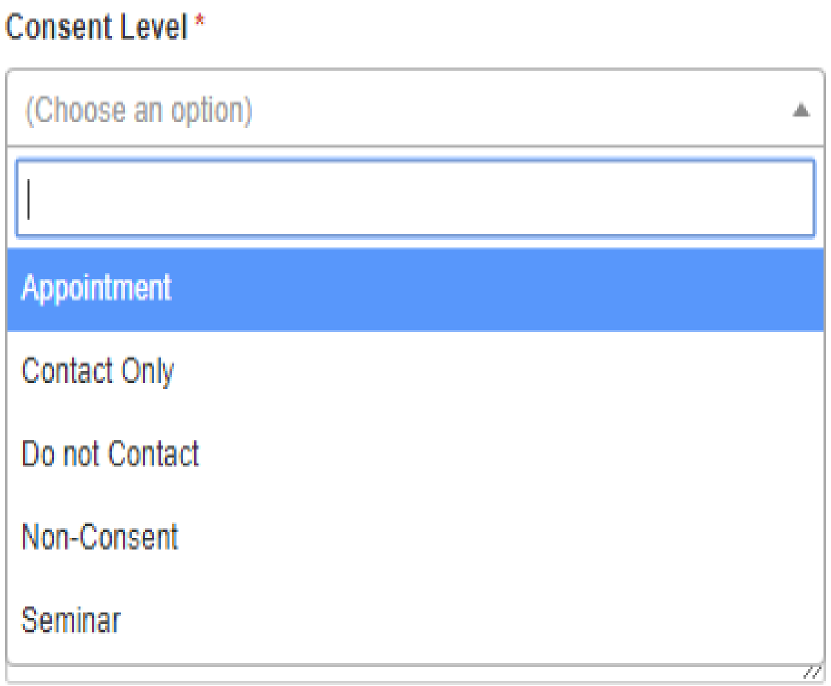
Once you submit an application into Cirrus, check back within 48 hours to ensure it was processed. Status could show Enrl Pending, Enrl Accepted <u>or</u> Incomplete. If the status is incomplete, take the following steps:

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.**



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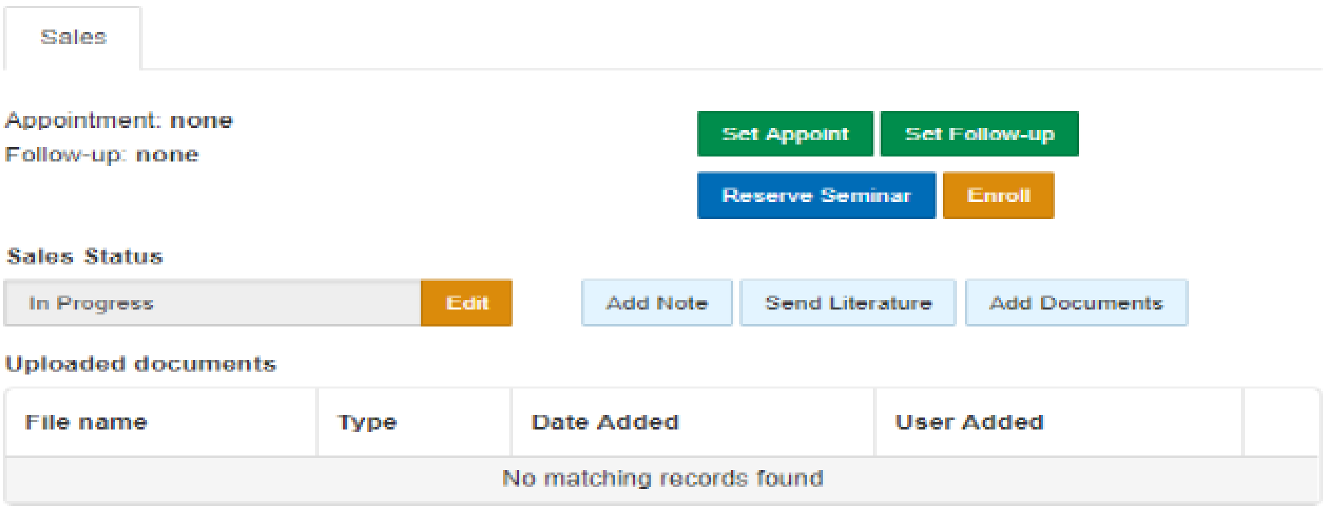
Follow-up Dates

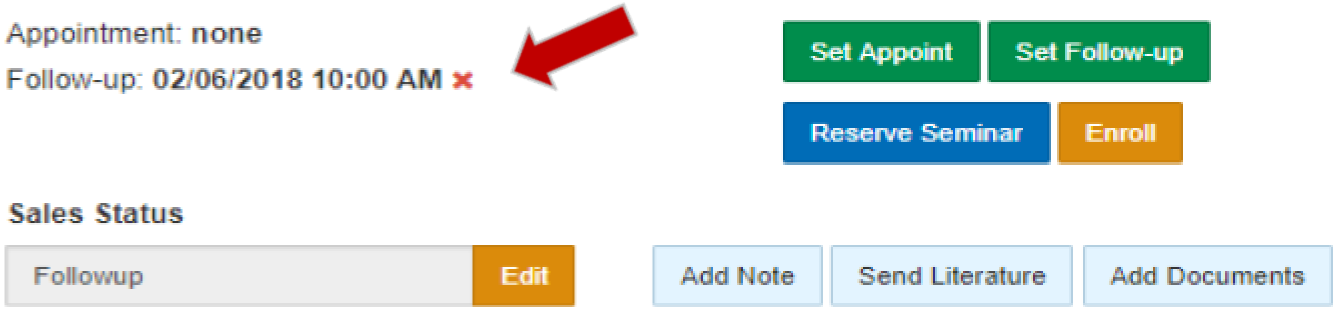
To set a reminder on your calendar to follow-up with your client at a later date click on **Set Follow-Up** on the lead screen. Then, you will need to fill in the appointment time and date. A note is also required before you click **"Save".**



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.



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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**.

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

- 1% Open Leads
- 0% Application
- 24% Enrollment
- 61% Declined
- 12% Closed
- 2% Opportunities

Category	Count
Open Leads	126
Application	3
Enrollment	2112
Declined	5264
Closed	1017
Opportunities	154
Total	8676

Status	Count
New Prospect	24
In Progress	61
Appointment	2
Followup	29
Commitment	10

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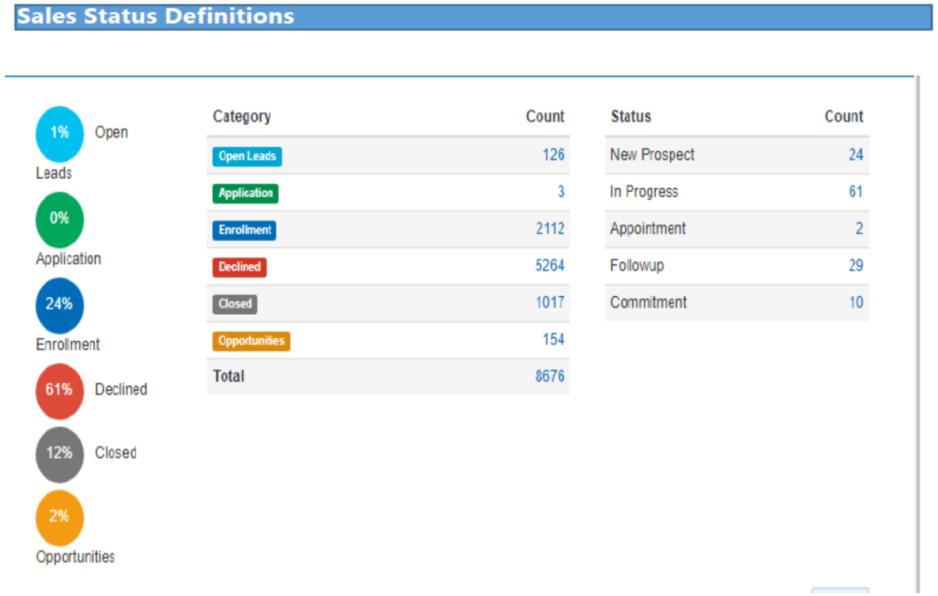
Sales Status Definitions

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.



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Sales Status Definitions

2020 AEP- Any beneficiary that requests information for the following AEP October 15th-December 7th.

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.

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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

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Lead Screen Tabs

Sales Notes | Application History | Enrollment Transactions | Literature Requests | Audit Trail

- **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.

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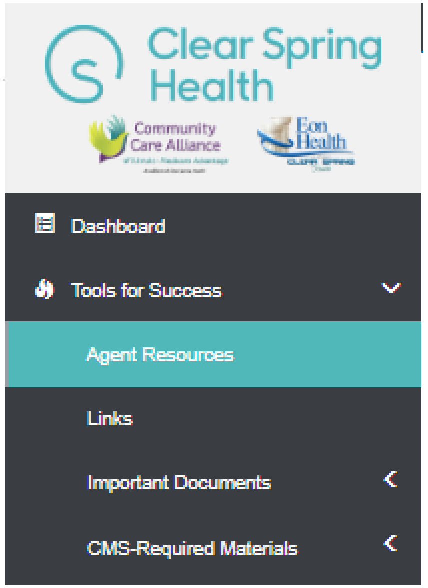
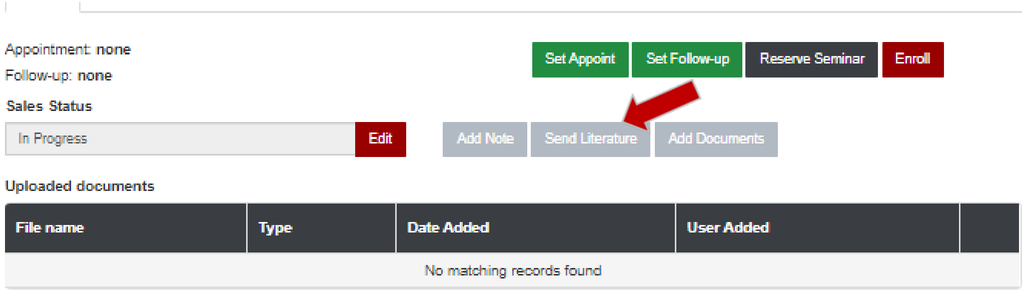
Literature Requests

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.



THANK YOU!

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