



**MedicareLINK**

SunfireMatrix 2021 Training Guide

# Communications

Report Type

Enrollments Communications

Communication search

Time frame Today

Communications

2 communications

Sort by Date sent

First name	Last name	Type	Status	Sent date	Time	Sent to	Enrollment code
Marie	Gray	Proposal	Sent	2020-07-15	12:23pm ET	m@g.com	
Tim	Barton	Consumer	Sent	2020-07-15	12:22pm ET	t@b.com	

If you navigate to your Reporting Tab and click "Communications" you'll be brought to the Communications tracker.

## Communications (cont.)

If you send a customer a link to your purl ("Consumer") or a plan proposal email ("Proposal"), a record of when you sent the link and whom you sent it to will appear here.

If the customer clicks on the link, the status will change to "Clicked." If after clicking the link they enroll in a plan, the status will change to "Enroll" and the enrollment code for the app will be shown in the right-most column, "Enrollment code."

To learn how to send a link to your purl, see our post "How To Send A Purl."

To learn how to send a plan proposal email, see our training video "Send A Quote/Plan Proposal Email."

Enrollment app e-sig requests and SOA e-sig requests are tracked via those respective sections of our tool, and will not show up here in "Communications." For help with app or scope e-signatures, see our FAQ articles on e-sigs and scopes.



## **Customer Profiles**

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# Prospects for the last 30 days

The screenshot displays a software interface with a vertical sidebar on the left containing icons for home, users, lists, messages, and reports. The main content area is divided into several sections:

- Quick links:** A horizontal bar with four buttons: "Search prospects" (with a group of people icon), "Quote & Enroll" (with a list icon), "Send a scope" (with a speech bubble icon), and "Reporting" (with a line graph icon).
- Prospects for last 30 days:** A section with two tabs: "View all for last 30 days" (selected) and "View older prospects". Below the tabs is a filter for "Last name starts with:" with a grid of letters A through Z. The letter 'C' is highlighted. Below the filter is a table with the following data:

First name	Last name	Disposition	Action
Iris	Ace	Enrolled	⋮

- Enrollments for the last 30 days:** A summary box showing a green checkmark icon followed by "133 Successful" and a red X icon followed by "17 Incomplete".
- Resources:** A section with two links: "Tutorial" and "Help with system".

Customers who you've entered into the tool within the last 30 days will appear in the "Prospects for last 30 days" area of your homepage.

# Prospects for the last 30 days

The screenshot displays a software interface with a sidebar on the left containing icons for home, users, lists, messages, and reports. The main content area is divided into several sections:

- Quick links:** A horizontal bar with four buttons: "Search prospects" (with a group of people icon), "Quote & Enroll" (with a list icon), "Send a scope" (with a speech bubble icon), and "Reporting" (with a line graph icon).
- Prospects for last 30 days:** A section with three tabs: "Prospects for last 30 days" (selected), "View all for last 30 days", and "View older prospects". Below the tabs is a filter for "Last name starts with:" with two rows of letters. The first row contains A, B, C, D, E, F, G, H, I, J, K, L, M, N, O. The second row contains P, Q, R, S, T, U, V, W, X, Y, Z. The letter 'C' is highlighted in both rows.
- Enrollments for the last 30 days:** A summary box showing a green checkmark icon followed by "133 Successful" and a red X icon followed by "17 Incomplete".
- Resources:** A section with the heading "Resources" and two links: "Tutorial" and "Help with system".





First name	Last name	Disposition	Action
Iris	Ace	Enrolled	⋮

Customers who you've entered into the tool within the last 30 days will appear in the "Prospects for last 30 days" area of your homepage.

By default, this list is alphabetized. To narrow it down, you can click one of the "Last name starts with" letters to show only applicable prospects.



# Prospects for the last 30 days

Quick links



Search prospects  Quote & Enroll  Send a scope  Reporting 

Prospects for last 30 days [View all for last 30 days](#) [View older prospects](#)

Last name starts with: A B C D E F G H I J K L M N O  
P Q R S T U V W X Y Z

First name	Last name	Disposition	Action
Elijah	Kent		
James	Kent	Enrolled	

Enrollments for the last 30 days

 133 Successful  17 Incomplete

Resources

[Tutorial](#)

[Help with system](#)

For example in the screenshot above, the letter "K" has been clicked, so only customers with the last name beginning with a K that have been entered into this agent's tool will appear.

**Note: Just because a prospect does not appear here does not mean that they have are missing from your tool.** If a prospect was entered into your tool over 30 days ago, you can click the "View older prospects" link to search for them, or see our post "Cannot find customer."

# Dispositions

The screenshot displays the SunFireMatrix web application interface. At the top, the header includes the SunFireMatrix logo, navigation links for 'Customers' and 'Customer: Tim Smith', and a dropdown menu currently set to 'Enrolled'. A 'Save' button is located to the right of the dropdown. Below the header, the main content area is divided into sections. The 'Edit customer profile' section contains input fields for 'First name\*' (filled with 'Tim'), 'Last name\*' (filled with 'Smith'), 'Phone', and 'Email'. To the right of these fields, there are input fields for 'Code' (filled with '33760') and 'Date of birth' (formatted as mm / dd / yyyy). A 'Cancel' button is visible to the right of the date field. Below the profile section is the 'Search criteria' section, which includes input fields for 'Last name' and 'Date of birth' (formatted as mm / dd / yyyy). At the bottom is the 'Search results' section, which displays a table with columns for 'First name', 'Last name', 'D...', 'Email', 'Phone', and 'Disposition'. A dropdown menu is open, showing a list of dispositions: 'Active' (highlighted in blue), 'New', 'Duplicate', 'Deceased', 'Ineligible', 'Left voicemail', 'Follow-up', 'Sent scope', 'Sent PPE', 'Sent PURL', 'Sent app link', 'Sent eSignature', 'Not interested', 'Enrolled', and 'Enrollment error'.

Dispositions are shown beside the customer's name in the active customer area of the page (near the top, see screenshot), as well as in search results when you search for them by last name.



## Dispositions (cont.)

They are designed to help you keep track of where a customer is in the enrollment process.

Disposition is set automatically when a customer is enrolled as "Enrolled" or "Enrollment Error" when, respectively, an enrollment app is successfully or unsuccessfully submitted for that customer. Those two dispositions cannot be selected by you. Any other disposition can be set by you at any time as you see fit.

Dispositions are not communicated to carriers, and are purely for your own use and reference.

\*\*If you have duplicate records for the same customer, you can set the disposition of the duplicate record to "duplicate" to avoid confusion.

# Duplicate Customer Profiles

Customer profiles cannot be deleted as of now. As you get more comfortable with the tool, you'll find that accidental duplicate customer records are generated less and less often.

We strongly recommend editing existing customer profiles when you would like to update their information, rather than creating new ones that can't be deleted.

For how to find customer records, see our post "Cannot Find Customer."

If you do create a duplicate customer record by accident, we recommend changing the "name" on the duplicate record to something like "null" or "void" so that it is not mistaken with the "real" Slim Shady. Another option is to set the disposition of the duplicate record to "Duplicate." See our post "Dispositions" for more on this.

If you have two customers with the same name, we recommend adding their middle initial to the first name field in their profile. For example if you have two customers John Doe, and one has the middle initial "A", you would type "John A" into the first name field of that person's customer profile. Then you'd have two records, John Doe and John A Doe.



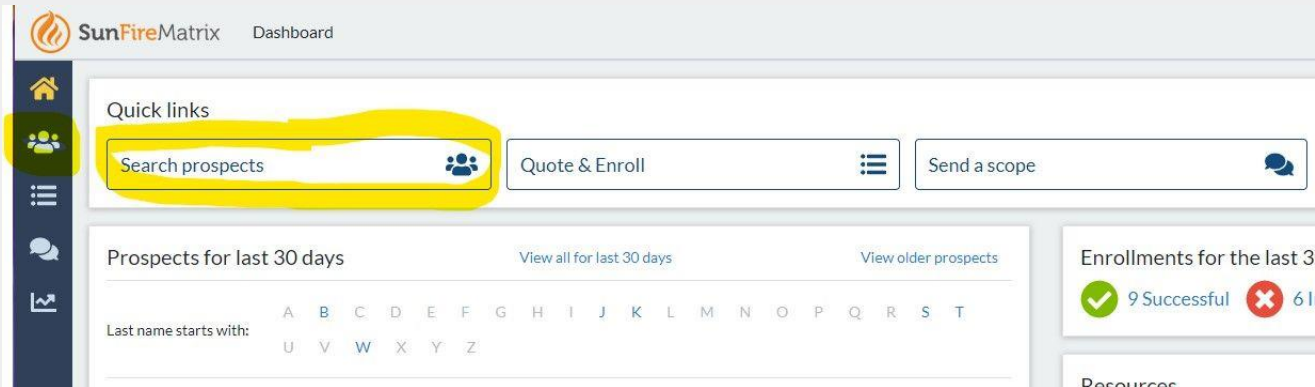
The screenshot shows a web form titled "Edit customer profile". It contains the following fields:

- First name\***: A text input field containing "John A".
- Last name\***: A text input field containing "Doe".
- ZIP code**: A text input field containing "33040".
- Phone**: A text input field that is currently empty.
- Email**: A text input field that is currently empty.
- Date of birth**: A date picker interface showing "mm / dd / yyyy".

# Cannot Find User

Customer records cannot be deleted, so rest assured if they were saved, they are in the tool. Search for the customer to find them:

Click "Search prospects" or click the "Customers" icon



# Cannot Find User (Cont.)

Search by any field shown here: Last name, DOB, phone, or Disposition. We recommend searching by only one of these fields. You can search by partial last name if they are not coming up.

Customer profiles

New profile

Search criteria

Last name

bu

Date of birth

mm / dd / yyyy

Phone

Disposition

▼

Clear

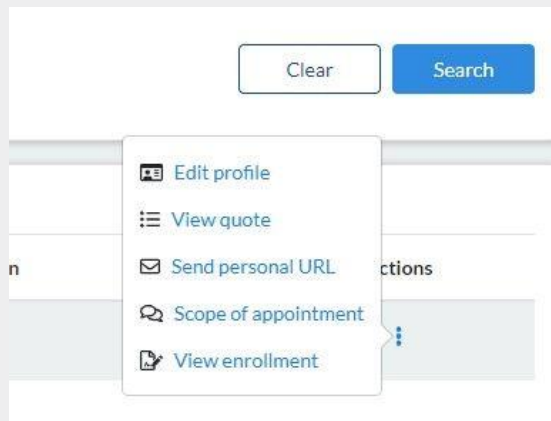
Search

Search results

First name	Last name	Date of birth	Email	Phone	Disposition	Actions
Jimmy	Buffett					

## Cannot Find User (Cont.)

Once you find the customer, click the three dots below “Actions” and you’ll have several options including editing their profile viewing their quote, scope, enrollment, etc. if those have been completed.



You can also find customers using the "Prospects for last 30 days" window on your dashboard, if you have it. For more on that see our post "Prospects for last 30 days."

# Understanding Customer Profiles

The customer profile is purely for record-keeping, and to help you access saved quotes using a customer's name rather than a personal code.

The information entered into a customer's quote, such as zip code (on the census page), medications, health status, etc. is saved to their quote. View their quote by searching for the customer by last name and clicking "view quote."

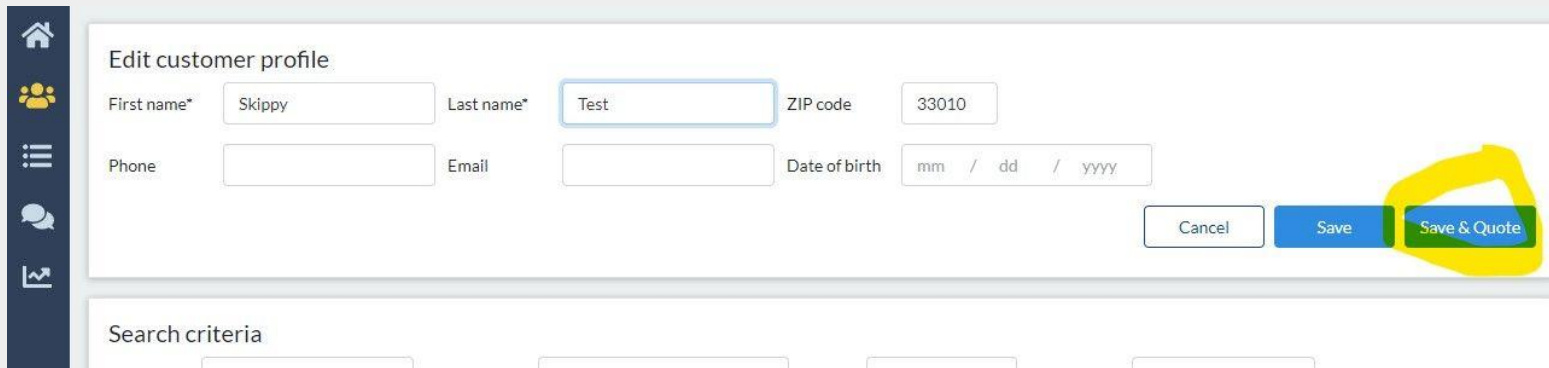
Now, what about all the info entered into the customer profile?

# Name, Birthdate, Email and Phone

- This information in the customer profile is purely for record keeping
- It does not automatically go through to the app
- They have to be confirmed each time they are entered into an enrollment app per compliance, so they cannot be pre-filled and have to be manually entered into the app (as of now).
- Always ensure they are entered correctly into an enrollment app

# Zip Code In Customer Profile

- Zip code can be recorded in the customer profile for record keeping
- To jump to a quote in the zip entered, click “Save & Quote” (see screenshot)
- Always confirm the customer's zip when beginning a quote or enrolling a customer, and ensure you are quoting in the correct zip



Edit customer profile

First name\* Skippy Last name\* Test ZIP code 33010

Phone Phone Email Email Date of birth mm / dd / yyyy

Cancel Save Save & Quote

Search criteria

Note: If you edit the zip code on the census page, it will not automatically update their customer profile, but it will update the zip code of the quote you are running for that customer and be saved to that customer's quote along with their drug list, health status, etc.



# Disposition

This information is purely for your own use and record-keeping.

To learn more about this feature, see our posts about Dispositions.



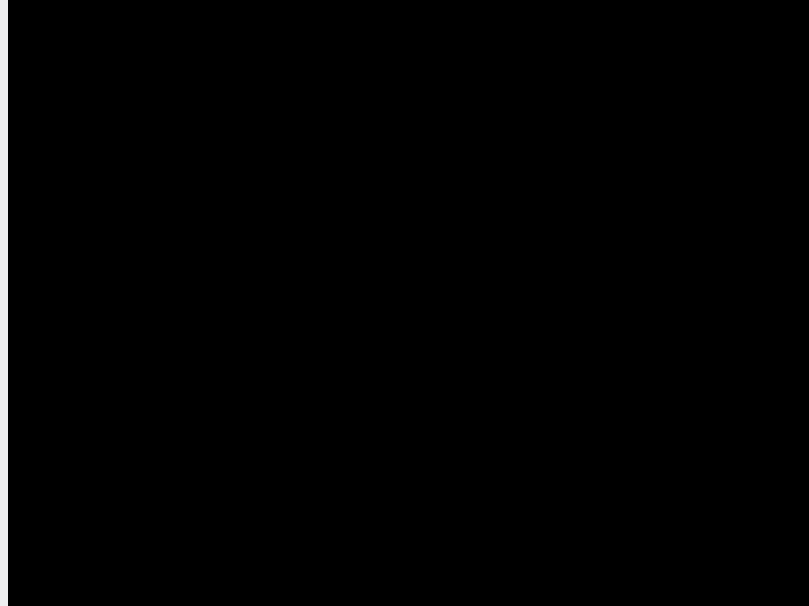
**eSignatures**

SunfireMatrix 2021 Training Guide

# Video: e-Signatures

Here is our training video on how to use the e-Signature function.

We recommend staying on the phone with the customer until they finish signing whenever possible. For further questions, see our other posts on this topic, covering troubleshooting, sending a new link to e-Sign, and more.



# How Do I Send a New Link to e-Sign?

Before initially sending a link, see our post "e-Signature Best Practices" and our training video "e-Signatures via Text/Email."

Note: e-Signature links are valid for 24 hours. If the customer does not sign within 24 hours, the app will have to be re-submitted. We are working on an enhancement that will make this easier, and will be out as soon as possible.

## **How to send a new link:**

- After you click "Send text" or "Send email" you'll see the "Send" button turns into a "Cancel" button (see screenshot below)
- DO NOT click "End Enrollment" yet
- Remain on the phone with the customer, ensure they can find the e-Sign request, and help them e-Sign if possible
- If you need to send a new link to e-Sign or need to edit the app, click the "Cancel" button. Now you can select a new email/mobile number to send the e-Sign request to, or can go back and make any needed edits to the app
- When ready, send the new e-Signature similar to how you did initially
- Note that there will now be a new personal code shown, and the customer will have to use this new personal code to e-Sign this time

# How Do I Send a New Link to e-Sign? (Cont.)

Sign and submit your application

☐ e-Signature (customer present)  
☐ Signature pad (customer present)  
☒ Send e-Signature request (customer on phone)

Email

Warn customer that the enrollment form may appear in their Junk or Spam folders.

Email Address\*  
test@test.com [Cancel](#)

Personal code: 806889  
This personal code will expire after 24 hours.

☐ Waiting on customer to complete enrollment...

[Summary of Benefits unavailable. Click here to change location.](#)

[View Summary](#) [End Enrollment](#)

## How do I send a new e-Signature request after clicking "End Enrollment"?

- We don't support this currently; we will be adding the ability to do so.
- For now, you will need to complete a new app

# Troubleshooting e-Signatures

## **What if the customer has not received the e-Signature link?**

- Confirm the email/number to which the link was sent
- Ask the customer if they have a good cell/wifi/internet connection
- If sent via email, ask them to check their spam/junk folder
- If none of that works, try sending a new link to a different number or email address (see "How do I send a new link to e-Sign?")

# e-Signature Miscellaneous Troubleshooting

## **Space in Name Error:**

- Sometimes seniors mistakenly type a space at the end of their first or last name. The tool will throw an error in this case.
- Ask them to delete the space at the end of their name
- If that doesn't work, have them enter their name again letter-by-letter, not using auto-correct and ensure they don't enter a space at the end of their name

## **Birthdate Error:**

- The birthdate they enter into the link must match the birthdate as it was entered into the app
- If the birthdate they are entering is different from the one in the app, then either they are mistyping their birthdate or the birthdate in the app has to be updated. See the steps in "how do I re-send a link to e-Sign?"

## **Blank Screen After Clicking Link:**

- Have them try again in a different browser, preferably Chrome
- Try having them clear their cache/history and click the link again

# e-Signature Best Practices

e-Signatures are designed to be used while you are still on the phone with the customer whenever possible. The whole process, from sending an e-Signature to the customer completing it, can take as little as 30 seconds if the enrollment has already been reviewed with the customer.

**If you remain on the phone with your customer for the entire e-Signature process:**

- You can make sure they are able to find the e-Signature link
- You can send a new link to a different email address or mobile number if needed
- You can assist them in e-signing
- If incorrect info is found on the app you can go back and edit it if needed, then send a new e-Signature link



# e-Signature Best Practices (Cont.)

If it is not possible to remain on the phone with the customer while they sign:

- Make sure they have received the e-Signature request before ending the call
- DO NOT click “End Enrollment” until the customer has confirmed they have received the link to e-sign
- This way you can re-send the link if needed
- Provide them with the personal code shown, which they need to access the eSignature page
- Once you click “End Enrollment,” if the customer has any issues with the e-Signature, you’ll have to complete a new app for them to sign. We are in the process of changing this so that a new link to e-sign can be sent in this scenario.

To learn how to complete an e-Signature, please see our training video on the subject.

- For troubleshooting, see our post "Troubleshooting e-Signatures"



## **Enrollments**

SunfireMatrix 2021 Training Guide

# C-SNPs

If you are certified to sell C-SNP plans, you will find that an increasing number of C-SNP plans are offered through the SunFire tool.

These plans are found, just like D-SNPs, by selecting the "Special Needs" plan type radio button.

The screenshot displays the SunFire tool interface for selecting C-SNP plans. On the left, a sidebar contains a 'Plan type' section with four radio buttons: 'Medicare Advantage/Part D', 'Part D', 'Medicare Supplement', and 'Special Needs'. The 'Special Needs' button is selected and highlighted with a yellow circle. Below this is a 'Filter by' section with a 'Company' list including Aetna Inc., AIDS Healthcare Foundation, Centene Corporation, Doctors HealthCare Plans, Inc., Guidewell Mutual Holding Corporation, Humana Inc., Longevity Health Plan, MMM of Florida, Inc., Molina Healthcare, Inc., Solis Health Plans, UnitedHealthcare, and WellCare Health Plans, Inc. The main content area shows three plan cards. The first card is for 'Allwell Dual Medicare (HMO D-SNP)' by Allwell, with ID H5190-004-000, a 3 out of 5 star rating, and an estimated annual cost of \$0. The second card is for 'Preferred Medicare Assist (HMO D-SNP)' by UnitedHealthcare, with ID H1045-012-000, a 4 out of 5 star rating, and an estimated annual cost of \$0. The third card is for 'DrCare (HMO-POS C-SNP)' by Doctors HealthCare Plans, Inc., with ID H4140-003-000, and a note that the star rating is too new to be measured. Each card also displays 'ESTIMATED ANNUAL COSTS' (Total, Health, Drug) and 'Max. out-of-pocket' amounts. The 'Special Needs' plan type is highlighted in yellow in the original image.

Plan type	Company	Plan ID	Star Rating	Estimated Annual Costs	Max. out-of-pocket
Special Needs	Allwell	H5190-004-000	3 out of 5 stars	Total: \$0 Health: \$0 Drug: \$0	\$3,400 (in-network)
	UnitedHealthcare	H1045-012-000	4 out of 5 stars	Total: \$0 Health: \$0 Drug: \$0	\$3,400 (in-network)
	Doctors HealthCare Plans, Inc.	H4140-003-000	Star Rating: Plan too new to be measured	Total: \$0 Health: \$0	\$4,500 (in-network) / \$4,500 (combined)

As you know, there is a list of questions the customer must be asked to determine if they qualify for a C-SNP plan or not. These questions are visible once you begin an enrollment with the customer.

# Video: Enrollment

- This how-to video outlines the basics of completing an enrollment using our tool.

**SunFireMatrix** Medicare Plan Search Customer: Joe Hall

28 plans found in 10506 Sort: Monthly premium Time period: Annual Display: **Plan costs** Plan benefits

**Plan type**

- ☒ Medicare Advantage/Part D
- ☐ Part D
- ☐ Medicare Supplement
- ☐ Medicare Advantage
- ☐ Special Needs

**Filter by**

Company

- ☐ Aetna Inc.
- ☐ Affinity Health Services Holdings, Inc.
- ☐ Anthem Inc.
- ☐ Elderplan, Inc.
- ☐ EmblemHealth, Inc.
- ☐ MVP Health Care, Inc.
- ☐ ParkerCare New

**Aetna Medicare Elite Plan (PPO)**  
Aetna Medicare  
H5521-120-000  
★★★★ 4 out of 5 stars

**ESTIMATED ANNUAL COSTS**

Total:	\$0	Max. out-of-pocket: \$6,700 (in-network) / \$10,000 (combined)
Health:	\$0	Health deductible: \$1,000
Drug:	\$0	Drug deductible: \$245 (excludes tier 1 and 2 drugs)

☐ Compare / Email Quote **\$0.00 Monthly premium** **Enroll**

**Affinity Medicare Passport Essentials (HMO)**  
Affinity Health Plan  
H5991-003-000  
★★★ 3 out of 5 stars

**ESTIMATED ANNUAL COSTS**

Total:	\$0	Max. out-of-pocket: \$6,700 (in-network)
Health:	\$0	Health deductible: \$0
Drug:	\$0	Drug deductible: \$295 (excludes tier 1 and 2 drugs)

☐ Compare / Email Quote **\$0.00 Monthly premium**

# "Enrollment Form Not Found"

**If you get this error, retry viewing the enrollment form after trying each of these steps in order:**

- Click ok and try again
- Confirm your internet connection is solid
- Clear your cache
- Ensure you're in the Chrome browser, our recommended browser

**If none of that works, contact your manager or internal support team and provide:**

- Your NPN
- The zip code you are searching in
- The carrier and plan id of the plan

# What if there's a Typo on the app?

On the last page of all apps, we provide a summary where you can review the information entered with your customer. If you use a texted or emailed e-signature link, the customer can also review the app before signing.

If a typo on an app is found before submitting the app, edits can be made and the customer will need a new link to sign. See “How do I send a new link to e-Sign?”

If a typo is found on an app after submission, your manager needs to be notified as soon as possible. Once an app has been sent to the carrier, it cannot be changed via SunFire and you will have to contact the carrier to correct the typo.

# Why isn't an app in my carrier portal?

If an app is not on your book of business or you have not been paid, follow these steps, in order:

- Check that there are no errors on the app and that the app was submitted successfully (see “How do I know if there’s an error on an app?”)
- Check that it has been 10 business days since the app was submitted
- Check that the member wasn’t already enrolled in the same plan
- Call the carrier’s Agent Support Line to inquire. Sometimes the carrier will say “we have no record of the app” if the app was denied, so if they say that, you should ask the carrier if the app has been denied.
- If none of these steps identify the issue, contact your manager.

Carrier processing times are often faster than 10 business days, but they are out of our control and depend on what is going on internally at the carrier and time of year. We send apps to the carriers daily, and in some cases instantaneously.

# Errors: How do I know if an app has an error?

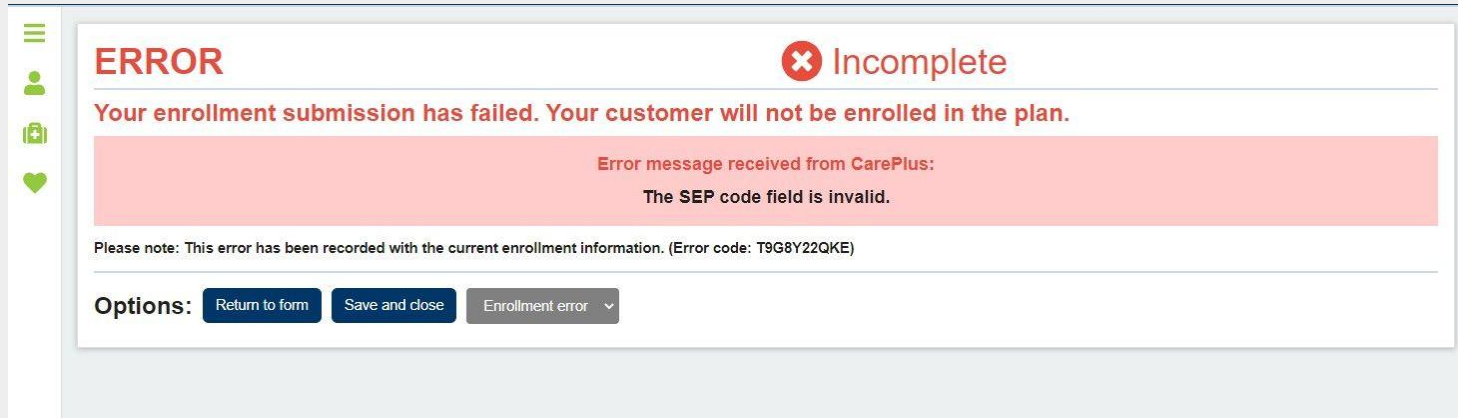
- Just because there is an enrollment code for an app doesn't mean the app has been submitted. Always confirm that an app has been successfully submitted by using one of the methods below.
- When completing enrollment apps, you'll see that the tool doesn't let you move on to the next page of the app until all the required information has been entered, each part in it's correct format, and all required questions have been answered.
- Even so, sometimes there are still errors when the app is submitted. This will be shown in several places:



# Errors: How do I know if an app has an error? (Cont.)

## Upon Submission

- Right after you click submit, you'll be brought to a page like the one below, stating either that the app was successful or stating the error that occurred. \*Note: the "error code" shown in parenthesis is the enrollment code for the app.



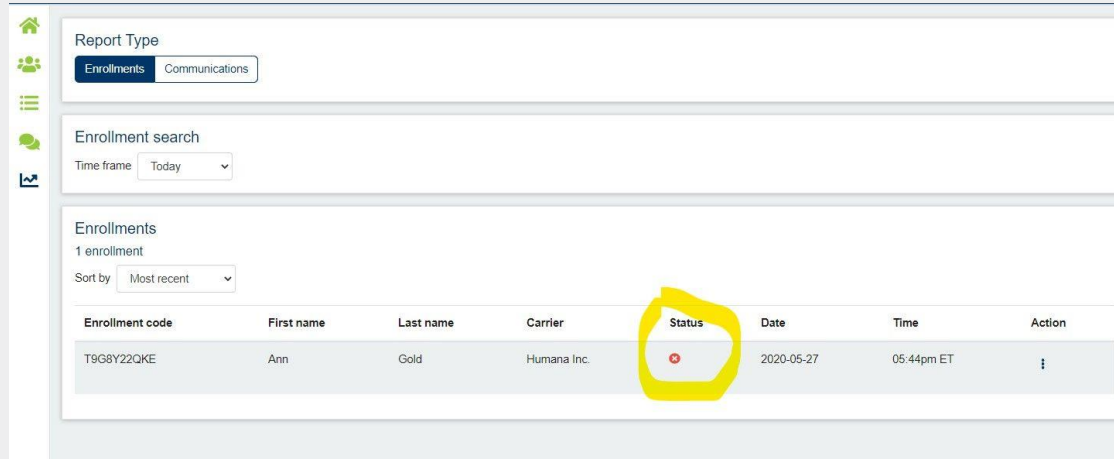
The screenshot shows a web interface with a sidebar on the left containing icons for a menu, a person, a document, and a heart. The main content area has a white background with a red 'ERROR' header and a red 'Incomplete' status with a red 'X' icon. Below the header, a red message states: 'Your enrollment submission has failed. Your customer will not be enrolled in the plan.' A red box contains the error message: 'Error message received from CarePlus: The SEP code field is invalid.' Below this, a note says: 'Please note: This error has been recorded with the current enrollment information. (Error code: T9G8Y22QKE)'. At the bottom, there is an 'Options:' section with three buttons: 'Return to form', 'Save and close', and 'Enrollment error' with a dropdown arrow.

- You can click "Return to form" and correct the error with the customer, and they will sign the app again
- You can also save & close, but remember to come back to it later since the app has not been submitted!



# Errors: How do I know if an app has an error? (Cont.)

## Reporting Tab

- In your Reporting tab, the status will be shown as a red X (rather than a green check mark). If you click on the 3 dots below actions, you can either View or, depending on the reason for the error, Open and correct the app.



The screenshot displays the 'Reporting Tab' interface. On the left is a sidebar with icons for home, users, list, chat, and a chart. The main content area has a 'Report Type' section with 'Enrollments' and 'Communications' tabs. Below is an 'Enrollment search' section with a 'Time frame' dropdown set to 'Today'. The 'Enrollments' section shows '1 enrollment' and a 'Sort by' dropdown set to 'Most recent'. A table lists the enrollment details:

Enrollment code	First name	Last name	Carrier	Status	Date	Time	Action
T9G8Y22QKE	Ann	Gold	Humana Inc.		2020-05-27	05:44pm ET	

A yellow circle highlights the 'Status' column, which contains a red X icon, indicating an error.

# Errors: How do I know if an app has an error? (Cont.)

## Viewing App After Submission

- If you view the app after submission was attempted, it's submission status will be shown at the top of the app, similar to in the screenshot above.

## Customer Search

- Finally, you will be reminded that this app has an error when you search for your customer by last name. Their disposition will automatically be set to "Enrollment error." See our post on "Dispositions" for more info

The screenshot displays a web application interface for managing customer profiles. At the top, there's a 'Customer profiles' header with a 'New profile' button. Below this is a 'Search criteria' section with input fields for 'Last name' (containing 'gold'), 'Date of birth' (mm / dd / yyyy), 'Phone', and a 'Disposition' dropdown menu. 'Clear' and 'Search' buttons are also present. The 'Search results' section contains a table with columns: First name, Last name, Date of birth, Email, Phone, Disposition, and Actions. A single result is shown for 'Ann Gold', with the 'Disposition' column value 'Enrollment error' circled in yellow. At the bottom, a dark blue bar shows 'Customer: Ann Gold' followed by a document icon, a dropdown menu currently set to 'Enrollment error', and a 'Save' button.

First name	Last name	Date of birth	Email	Phone	Disposition	Actions
Ann	Gold				Enrollment error	⋮

Customer: Ann Gold [Document Icon] Enrollment error [Dropdown Arrow] Save

# Troubleshooting Enrollment Errors

Most of the errors we display are self-explanatory. Here are some of the trickier ones:

## **"App Not Signed"**

- The customer did not e-sign within the 24 hours they had to do so.
- A new app will have to be written and signed.
- Soon we will enable a way for you to re-send signature requests when this is the case.

## **"Invalid SEP Code"**

- Another, valid SEP code will have to be selected
- Sometimes rather than Codes, you may see SEP "Reasons" such as "I recently turned 65." This is what this error is referring to, and a different, valid reason will have to be selected

# Troubleshooting Enrollment Errors (Cont.)

## "Unknown Error"

If you get the error "An unknown error has occurred submitting the enrollment" after you submit an app, it could be one of two things:

- There may be an issue with your certification to sell the plan or your writing number
- We were unable to communicate with the carrier's server at the moment the "Submit" button was clicked
- Note that this error should only occur with Humana & Anthem plans.

### Here's what to do:

- Try again right away, while your customer is on the phone
- If that doesn't work, end call with customer and make sure you are certified to sell this plan in the state selected
- If you are certified to sell plans from that carrier in that state, check your RTS status in our tool. Navigate to your agent profile, then click "generate." See screenshot below.



- If your RTS looks good, try submitting again later in the day and contact your manager with difficulties. See our post "How do I send a new link to e-sign?" if applicable.
- If you do not have RTS, check with your manager and/or the carrier if you feel there is an error.

# Enrollment Codes

Just because there is an enrollment code for an app doesn't mean the app has been submitted successfully.

Enrollment codes allow you and your support staff to keep track of each app, whatever phase it is in. They are generated:

- When a partially completed app is saved
- When an app is submitted successfully
- When an app is submitted unsuccessfully

Always confirm that an app has been successfully submitted. This is shown to you immediately after clicking “submit.” See our post “How do I know if an app has an error?” for more on apps with errors.



## **Notifications**

SunfireMatrix 2021 Training Guide

# Notification Definitions

To opt in to Notifications via email and/or text, see our post "Setting Up Mobile Notifications."

Here are the notifications you will receive when you opt in:

- **"Scope signed"** - The customer signed the scope that you sent them, and it is ready for you to sign if you have not done so already
- **"Online enrollment"** - Customer completed an app on your purl
- **"eSignature complete"** - Customer signed an app via an e-Signature link
- **"eSignature incomplete"** - You have sent this customer a link to sign, but they have not yet signed and still have time to do so. Remember, e-Signature links expire after 24 hours.
- **"eSignature past due"** - The customer did not sign within 24 hours and their link to do so has expired. They will need a new link to sign sent to them. See our post "How to send a new link to e-Sign"

**NOTE:** Notifications via text/email regarding enrollment apps will have an enrollment code in them. This is especially important if you have more than one notification for the same person. Use these enrollment codes to determine which specific app the notification is referring to.



# Viewing Notifications

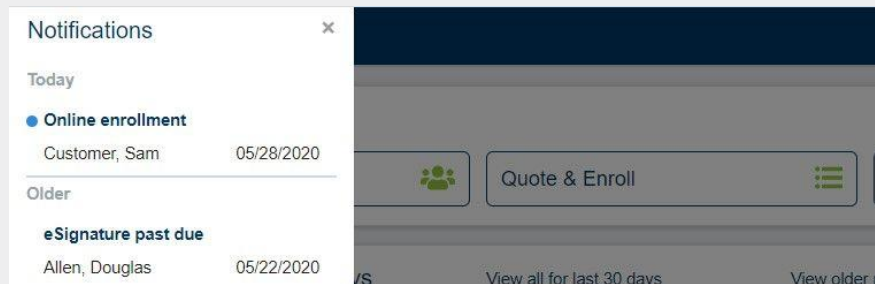


You can view notifications by clicking on the bell icon in the lower left-hand corner of the page, shown above. If you have unread notifications, the bell will have a red circle with a white number in it to show the number of unread notifications, just like with unread emails or texts on mobile phones.



## Viewing Notifications (Cont.)

When you click on the bell icon, you will see the actual notifications themselves. New notifications have a blue dot beside them. If you click on any notification, it takes you to the app or scope that is mentioned. For instance, if we click on the second notification on this list, "eSignature past due" for "Douglas Allen" we will jump to view the enrollment that Mr. Allen did not sign.



If you'd like to opt-in to receive these notifications via text and/or email, see our post "[Setting Up Mobile Notifications.](#)"

If you opt-in to mobile notifications, you will find that the mobile notifications include, if applicable, the enrollment code associated with the notification. This way if you have multiple apps for the same person, you can tell which app the mobile notification refers to by looking at the enrollment code shown.

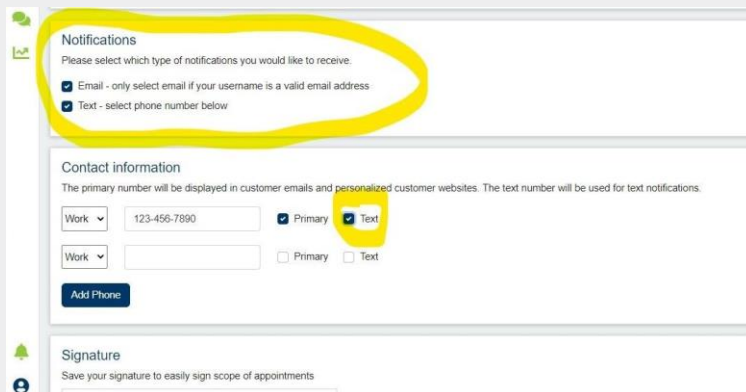
For clarification on what each notification means, see our post "[Notification Definitions.](#)"

# Setting Up Mobile Notifications

If you opt in to notifications in your agent profile, you will receive notifications via text and/or email when a customer:

- Signs an app via an e-Signature link
- Signs a Scope
- Has not yet signed and still has time to do so
- Did not sign within 24 hours and their link to do so has expired
- Completes an app on your purl

Each mobile notification will have a customer name and, if applicable, an enrollment code tied to it. This was you can see which enrollment the notification is referring to.



The screenshot shows a web form with three main sections. The first section, titled 'Notifications', is highlighted with a yellow oval and contains the text 'Please select which type of notifications you would like to receive.' followed by two checked checkboxes: 'Email - only select email if your username is a valid email address' and 'Text - select phone number below'. The second section, titled 'Contact information', contains a text input field with '123-456-7890' and two checked checkboxes: 'Primary' and 'Text'. The third section, titled 'Signature', contains a text input field. The 'Text' checkbox in the 'Contact information' section is also highlighted with a yellow circle.

**Notifications**  
Please select which type of notifications you would like to receive.

☒ Email - only select email if your username is a valid email address  
☒ Text - select phone number below

**Contact information**  
The primary number will be displayed in customer emails and personalized customer websites. The text number will be used for text notifications.

Work  ☒ Primary ☒ Text  
Work  ☐ Primary ☐ Text

[Add Phone](#)

**Signature**  
Save your signature to easily sign scope of appointments

# Setting Up Mobile Notifications (Cont.)

To opt in to or out of notifications:

- Visit your profile (see “Changing your username and password” for how to visit your profile)
- In the notifications section, check the boxes for the types of notifications you’d like to receive- See screenshot below
- If you select text notifications, you must continue to the Contact Information section and select “Text” checkbox beside the number at which you’d like to receive the text notifications

Here's an example of what you'll receive in an email notification:

Dear Brian,

You have a received a new notification.

eSignature past due

Customer: John Terrific

Confirmation code: J92AJVDX0Q

This e-mail, including any attachments, is intended solely for the use of the individual or entity to which it is addressed. If the reader of this e-mail is not the intended recipient, the reader is hereby notified that any dissemination, distribution, use or copying of this e-mail is strictly prohibited. If you have received this e-mail in error, please notify the sender by reply e-mail and destroy this e-mail immediately

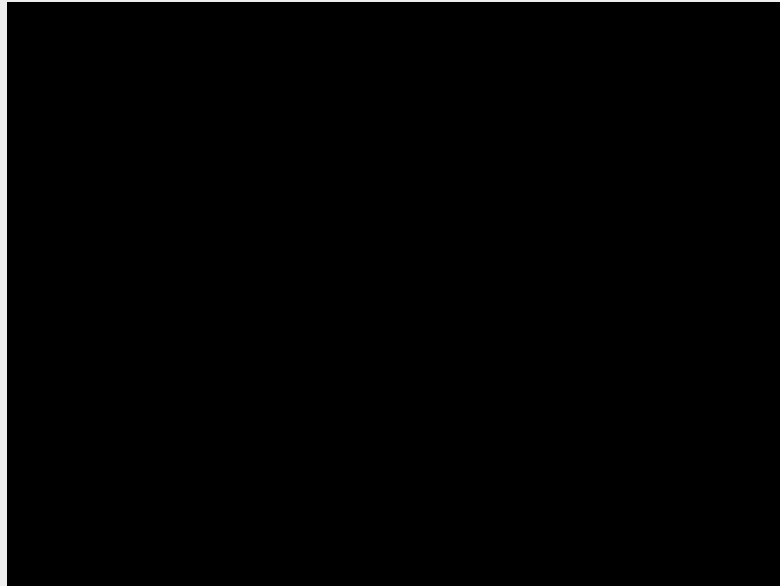


## **Personal Code**

SunfireMatrix 2021 Training Guide

# Video: Recalling Saved Sessions

This training video will walk you through how to make the best use of saved sessions, cover best practices, and show how to make sure that a customer's quote isn't overwritten or deleted by accident.

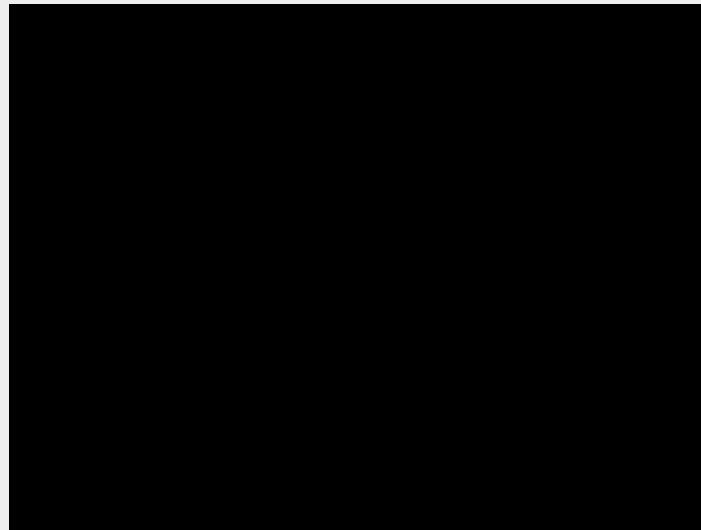


# Video: Helping Customers On Your Purl

If a customer is on your purl and has a question, this video covers some of the ways you can help them.

In addition to what's shown in the video: If a customer is in the middle of completing an enrollment app, they can still give you their personal code and you can pull their app up on your end. Use the same method shown in the video below.

If customers can't access your purl, see our posts "How To Send a Purl" and "Purl Troubleshooting."





## **Personal URL**

SunfireMatrix 2021 Training Guide



# Purl Troubleshooting

Issues with purls are very rare, but not impossible.

Note that:

- Only plans you are certified to sell will display on purl sites
- SNP and Med Supp plans will not currently display on purl sites, regardless of your appointments/certs.

If you are experiencing any issues with your purl, here are the troubleshooting steps:

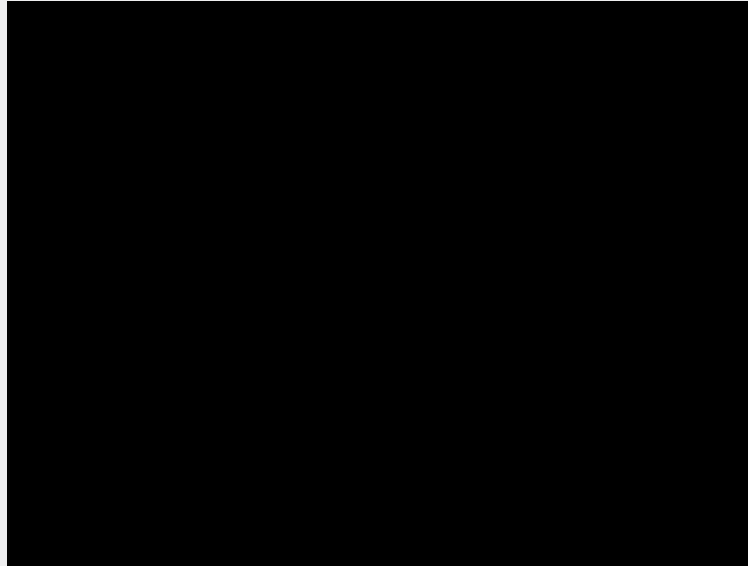
1. Ensure the link is correct. If you're not sure what the correct link is, try sending a link to yourself in the manner described in our post "How to send a purl"
1. Ensure the purl is being viewed using one of our recommended browsers:
  - Chrome (preferred)
  - Firefox
  - Safari
  - Microsoft Edge

If none of that works, have the customer clear their cache and browsing history.

# Video: Purl Site Overview

For the best way to send/view your purl, see our post "How to send a purl."

If you would like to know what your purl is you can watch the video below, or simply send a purl to yourself (enter yourself as a customer in your tool, then follow the steps in the post "How to send a purl.").



# How To Send a Purl

The best way to send someone your purl is to use our "send purl" feature. This avoids the possibility of typos that could cause the link either to not work or for someone else to get credit for the sale by accident.

You can also send your purl to yourself using this method if needed.

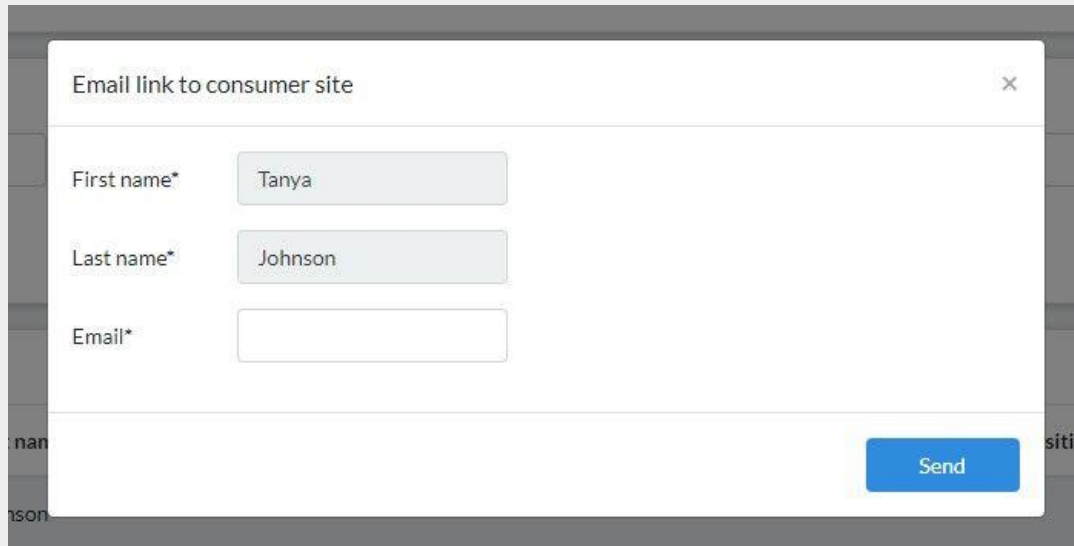
1. Find the customer record. You can do this in one of several ways...see our post "Cannot Find Customer" for the ways to find a customer record
2. Click the three dots below Actions to bring up the Actions menu
3. Click "Send purl"

The screenshot shows a web application interface for managing customer profiles. On the left is a dark blue sidebar with icons for home, people, list, chat, and analytics. The main content area has a white background. At the top, there's a 'Customer profiles' header with a 'New profile' button. Below is a 'Search criteria' section with input fields for 'Last name' (containing 'Johnson'), 'Date of birth' (with a date picker), 'Phone', and a 'Disposition' dropdown. 'Clear' and 'Search' buttons are at the bottom right of the search section. The 'Search results' section contains a table with columns: First name, Last name, Date of birth, Email, Phone, Disposition, and Actions. A single result is shown: Tanya Johnson. To the right of the table, an Actions menu is open, showing options: 'Edit profile', 'Start quote', 'Send personal URL' (highlighted in yellow), and 'Scope of appointment'.

First name	Last name	Date of birth	Email	Phone	Disposition	Actions
Tanya	Johnson					<ul style="list-style-type: none"><li>Edit profile</li><li>Start quote</li><li>Send personal URL</li><li>Scope of appointment</li></ul>

## How To Send a Purl (Cont.)

4. Enter the customer's email address into the popup. Their name will be pre-filled. Click send once you've verified the correct email address has been entered.



The image shows a modal window titled "Email link to consumer site" with a close button (X) in the top right corner. The form contains three input fields: "First name\*" with the value "Tanya", "Last name\*" with the value "Johnson", and "Email\*" which is currently empty. A blue "Send" button is located at the bottom right of the form.

Email link to consumer site	
First name*	Tanya
Last name*	Johnson
Email*	
<a href="#">Send</a>	



## Quoting

SunfireMatrix 2021 Training Guide

# Video: Recalling Saved Sessions

This training video will walk you through how to make the best use of saved sessions, cover best practices, and show how to make sure that a customer's quote isn't overwritten or deleted by accident.

# C-SNPs

If you are certified to sell C-SNP plans, you will find that an increasing number of C-SNP plans are offered through the SunFire tool.

These plans are found, just like D-SNPs, by selecting the "Special Needs" plan type radio button.

23 plans found in 33010 Sort: Monthly premium Time period: Annual Display: Plan costs Plan benefits

**Plan type**

- ☐ Medicare Advantage/Part D
- ☐ Part D
- ☐ Medicare Supplement
- ☐ Medicare Advantage
- ☒ Special Needs

**Filter by**

**Company**

- ☐ Aetna Inc.
- ☐ AIDS Healthcare Foundation
- ☐ Centene Corporation
- ☐ Doctors HealthCare Plans, Inc.
- ☐ Guidewell Mutual Holding Corporation
- ☐ Humana Inc.
- ☐ Longevity Health Plan
- ☐ MMM of Florida, Inc.
- ☐ Molina Healthcare, Inc.
- ☐ Solis Health Plans
- ☐ UnitedHealthcare
- ☐ WellCare Health Plans, Inc.

Plan name	Plan ID	Star Rating	ESTIMATED ANNUAL COSTS	Max. out-of-pocket	Health deductible	Drug deductible
<b>Allwell Dual Medicare (HMO D-SNP)</b> Allwell H5190-004-000 ★★★★☆ 3 out of 5 stars			<b>Total:</b> \$0 Health: \$0 Drug: \$0	\$3,400 (in-network)	\$0	\$435
<input type="checkbox"/> Compare / Email Quote <input type="button" value="Find doctors"/>			<b>\$0.00 Monthly premium</b>	<input type="button" value="Details"/>		
<b>Preferred Medicare Assist (HMO D-SNP)</b> UnitedHealthcare H1045-012-000 ★★★★☆ 4 out of 5 stars			<b>Total:</b> \$0 Health: \$0 Drug: \$0	\$3,400 (in-network)	\$0	\$435
<input type="checkbox"/> Compare / Email Quote <input type="button" value="Find doctors"/>			<b>\$0.00 Monthly premium</b>	<input type="button" value="Details"/> <input type="button" value="Enroll"/>		
<b>DrCare (HMO-POS C-SNP)</b> Doctors HealthCare Plans, Inc. H4140-003-000 Star Rating: Plan too new to be measured			<b>Total:</b> \$0 Health: \$0	\$4,500 (in-network) / \$4,500 (combined)	\$0	

As you know, there is a list of questions the customer must be asked to determine if they qualify for a C-SNP plan or not. These questions are visible once you begin an enrollment with the customer.

# Video: Send a Quote/Plan Proposal Email

This video explains how to email a plan to a customer so that they may review it and self-enroll in the plan.

Once you send a plan to a customer as described above, their actions (clicking on the link/enrolling in the plan) are tracked in your "communications" tab. For more on that, see our article on "Communications."



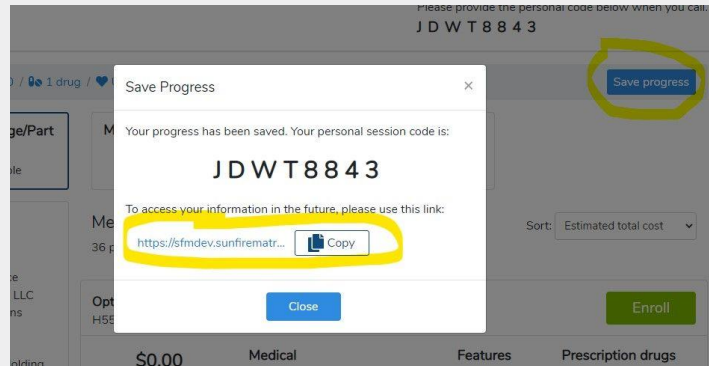
# Customer Drug List Self-Update

Customers can input their drug list (and health status, if they wish) themselves. Soon they'll be able to add/update their doctors, too. Using the method below, you'll be able to pull up everything they entered and confirm their selections as well as their zip code.

Steps 3 and 4 are critical!

1. Send the customer a link to your purl. See our post "How To Send A Purl" for how to do that.
2. For how to pull up what the customer entered on your purl, see the video below.
3. Before they leave your purl, make sure they save the link so they can return and edit their info next time. Here's how they do that:

There's a button "Save Progress" that they'll see after they enter their info. When they click it, there will be a link shown in a popup.



## Customer Drug List Self-Update (Cont.)

The customer can now either right-click the link and bookmark it, or click the "Copy" button and create a new bookmark, pasting the link into the bookmark, or save the link wherever they choose on their computer.

Another option is they can copy/paste the link into an email and email this link to you, and you can save it to their record in your CRM.

4. Next time the customer wishes to meet with you, they can either visit the bookmarked site, or you can send them their link (which in step 3, you saved to their record in your CRM). This way, they can update their own info before their appointment with you.

You may also wish to store your customer's personal code in your CRM, too. Coming soon, we'll have the ability for customers to enter their personal code into your purl.

Finally, if you have an existing customer that did not save the link last year, that's ok! You can send them your purl and create a new customer record for them using all the steps described above.

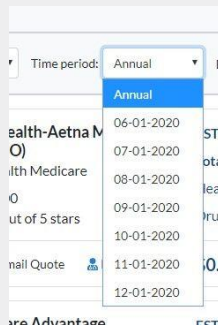
# Video: Create a Quote

Here is our Quoting how-to video:

# Time Frame

In our tool, we default to showing estimated total annual costs, i.e. as if the member began coverage on January 1st. You can change this to first of the next calendar month, or any month after that, depending on when the customer would like coverage to begin. This will help quotes match up.

For example, the screenshot below was taken in May. You can select June 1st, which is the 1st of the next calendar month, or any month after that through the end of the year.



In the beginning of your time using our tool, we understand you may cross-reference our quotes with other sites as you gain trust in our tool. If the quotes do not match up, you should make sure both sites are comparing costs over the same time frame before questioning the quote on either site.

# Why can't I see certain plans?

Always remember to begin every quote by clearing out the previous customer from active status and beginning a new session, if applicable. You'll know if this is possible if there is a personal code or someone's name displayed at the top of the page.

Click the button highlighted to clear and start a new session.



SunFireMatrix Medicare Plan Search Personal Code zt zg2336 Change

If you are still not seeing a plan that you believe you should be seeing:

- Check that you are looking in the correct zip code, and that the plan is available in that zip
- Check that you are certified for that carrier and plan type in that state
- Note that neither Special Needs nor Med Supp plans will show on purl sites
- Make sure you have selected the correct plan type radio button- See screenshot below
- DSNPs are found under Special Needs
- MA-only (no drug coverage) plans are listed separately from MAPD plans under "Medicare Advantage"

# Why can't I see certain plans? (Cont.)

23 plans found in 33010 Sort: Monthly premium Time period: Annual Display: Plan costs Plan benefits

Plan type

- ☐ Medicare Advantage/Part D
- ☐ Part D
- ☐ Medicare Supplement
- ☐ Medicare Advantage
- ☒ Special Needs

Filter by

Company

- ☐ Aetna Inc.
- ☐ AIDS Healthcare Foundation
- ☐ Centene Corporation
- ☐ Doctors HealthCare Plans, Inc.
- ☐ Guidewell Mutual Holding Corporation
- ☐ Humana Inc.
- ☐ Longevity Health Plan
- ☐ MMM of Florida, Inc.
- ☐ Molina Healthcare, Inc.
- ☐ Solis Health Plans
- ☐ UnitedHealthcare
- ☐ WellCare Health Plans, Inc.

Plan name	ESTIMATED ANNUAL COSTS	Max. out-of-pocket: \$3,400 (in-network)
<b>Allwell Dual Medicare (HMO D-SNP)</b> Allwell H5190-004-000 3 out of 5 stars	<b>Total:</b> \$0 Health: \$0 Drug: \$0	Health deductible: \$0 Drug deductible: \$435
<input type="checkbox"/> Compare / Email Quote <a href="#">Find doctors</a> <b>\$0.00 Monthly premium</b> <a href="#">Details</a>		
<b>Preferred Medicare Assist (HMO D-SNP)</b> UnitedHealthcare H1045-012-000 4 out of 5 stars	<b>Total:</b> \$0 Health: \$0 Drug: \$0	Health deductible: \$0 Drug deductible: \$435
<input type="checkbox"/> Compare / Email Quote <a href="#">Find doctors</a> <b>\$0.00 Monthly premium</b> <a href="#">Details</a> <a href="#">Enroll</a>		
<b>DrCare (HMO-POS C-SNP)</b> Doctors HealthCare Plans, Inc. H4140-003-000 Star Rating: Plan too new to be measured	<b>Total:</b> \$0 Health: \$0	Max. out-of-pocket: \$4,500 (in-network) / \$4,500 (combined) Health deductible: \$0

If the above steps do not reveal the plan you are seeking, the plan may be suppressed. We are given orders from the carriers to suppress certain non-commissionable plans. As such those plans will not appear in our tool.

With any doubts, contact your manager/internal support and let them know the:

- Carrier
- Plan/Contract/Seg ID of the plan
- The zip code you are looking in

# D-SNP Plans and LIS Status

Some D-SNP plans in our tool will display a premium at first. If a customer has LIS status, you need to enter it to display the correct plan premium and drug prices for your customer's specific situation.

On the census page, there is a place to enter the customer's LIS information. See screenshot below. This is information they should have that they can provide to you.

The screenshot shows a web form for entering customer information. On the left is a dark blue sidebar with icons for a person, a pharmacy, a heart, a folder, and a magnifying glass. The main form area has the following sections:

- ZIP code\***: A text input field.
- Extra Help/Low Income Subsidy (optional)**: A section highlighted with a yellow circle. It contains:
  - Drug copay/coinsurance:** Four radio button options:   
☒ None (I don't know)   
☐ \$1.30 - \$3.90 for covered drugs   
☐ \$3.60 - \$8.95 for covered drugs   
☐ Partial low-income subsidy
  - A note below the options: *Dual eligible plans will show the full premium unless an Extra Help/Low Income Subsidy option is selected above.*
- Medicare Supplement (optional)**: A section with three fields:
  - Effective date**: A dropdown menu with "Date" selected.
  - Date of birth**: A text input field with a placeholder "mm / dd / yyyy".
  - Gender**: Two buttons, "Male" and "Female".

At the bottom left of the form is a blue "Save" button.

# D-SNP Plans and LIS Status (Cont.)

As with any quote, always remember to clear the customer from active status at the end of your session with them!



NOTE: When an LIS level is selected, the tool adjusts the plan premiums on the plan results page based on the selected LIS level. However, on the details page for that plan and on the enrollment form, the full cost of the plan is listed.

For example: Let's say full price for a plan is \$14. If 50% LIS is selected, the tool adjusts the premium to be \$7 on the plan results page (the page where all available plans are listed). The Plan Details tab and the enrollment form, however, would both still show the premium to be \$14.

Agents report that cases like this, they are told to tell the customer "Your plan premium for this plan is \$14 but based on your LIS it can be as low as \$7." That way if the customer has a different level of LIS than what they stated or loses their LIS altogether, the agent and agency will be protected.



# Drug Dosage Not Available

It is important to take great care in entering drugs, as there are many details to keep track of.

If the desired dosage for a drug is not displayed; click “View my medications” and ensure the drug has not already been added at the desired dosage.

If you believe we are missing a dosage, let your sales manager know.



## **Scope of Appointment**

SunfireMatrix 2021 Training Guide

# Video: Scope Of Appointment

Here is our training video on completing Scope of Appointment documents using SunFire.

Note: In the latest version of SunFire, the "Send scope" flow has been separated into "Email scope" and "Text scope" flows. The process for using either is the same as outlined in the "Send scope" section of the video above.

For help with the e-signature process, see the "eSignatures" section of our FAQ site.



# **User Management**

SunfireMatrix 2021 Training Guide

# Changing your Username and Password - Agent

If you are having trouble logging in, have your manager/internal support confirm the username you should use to log in.

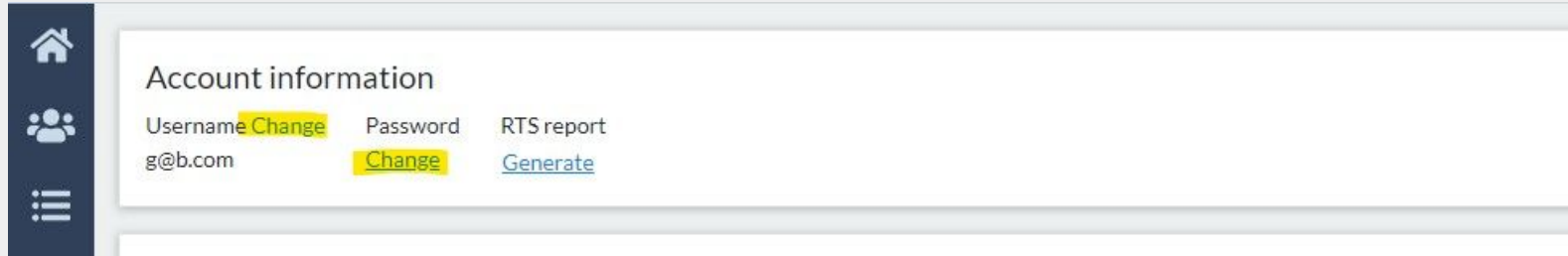
Once you are logged in, you can change your username or password. This is also covered in our training video "Setting Up Your Agent Profile."

Begin by navigating to your profile by clicking on your name in the upper right-hand corner and clicking "profile," or by clicking the profile icon on the lower left-hand corner (see screenshot below of Profile Icon).

The screenshot displays the SunFireMatrix user interface. At the top, there's a header with the SunFireMatrix logo, navigation links for "Customer Information" and "Personal Code", and a user menu for "Demo Blair" containing "Profile" and "Logout" options. The main content area is divided into sections for "ZIP code\*", "Extra Help/Low Income Subsidy (optional)", "Drug copay/coinsurance:", "Medicare Supplement (optional)", "Effective date", "Date of birth", and "Gender". A "Save" button is located at the bottom of the form. On the left sidebar, there are icons for user profile, home, heart, folder, and a question mark. A yellow arrow points to the profile icon at the bottom of the sidebar.

# Changing your Username and Password - Agent (Cont.)

Then click the appropriate links to change your username/password:



# Video: Setting Up Your Agent Profile

Here's a short training video on setting up your agent profile

To set up notifications, which is also done from your agent profile, see our posts on "Notifications"