

# Miramar:Agent Agent User Guide

Rev. 3/2019

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## I. INTRODUCTION

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*This document is housed on the Miramar:Agent Knowledge Base for Agents (<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.

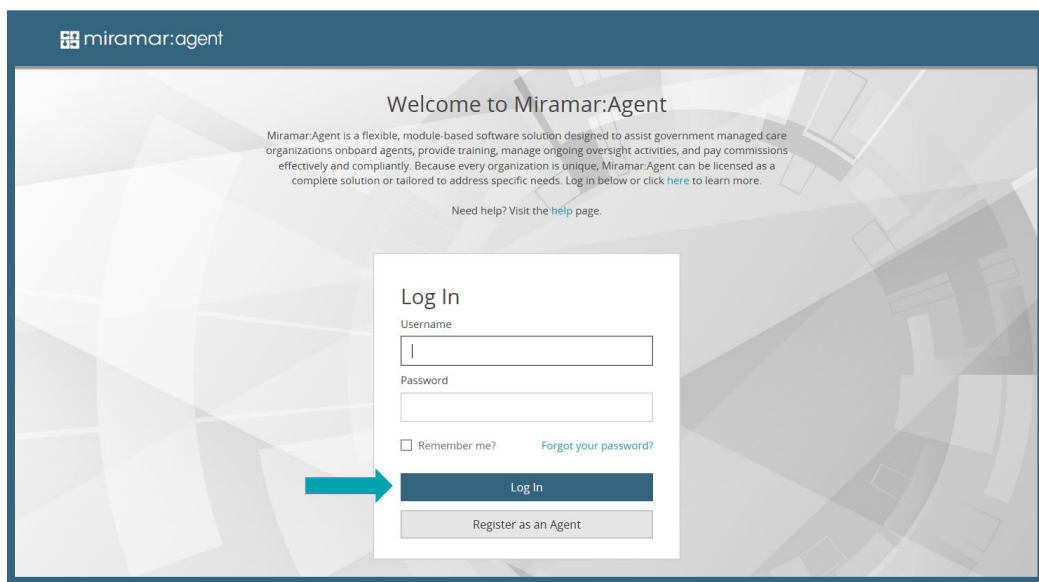
## II. GETTING STARTED

### 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](http://www.miramar-agent.com) and enter your username and password on the main landing screen. Click **Log In**.



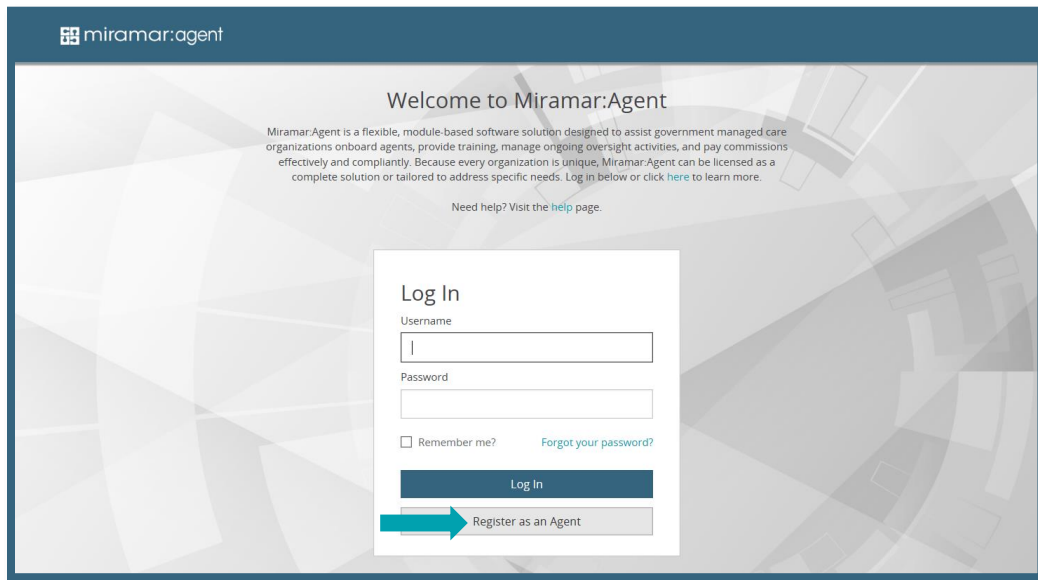
**TEAM SUPPORT:** Logins are NOT carrier/plan or program specific. Returning users will use their existing username and password to access any additional programs they need to complete.



The screenshot shows the Miramar:Agent login interface. At the top, the header reads "miramar:agent". Below it, a "Welcome to Miramar:Agent" message is displayed, followed by a brief description of the software and a link to the help page. The main focus is the "Log In" form, which includes fields for "Username" and "Password", a "Remember me?" checkbox, a "Forgot your password?" link, and "Log In" and "Register as an Agent" buttons. A red arrow points to the "Log In" button.

## 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**.

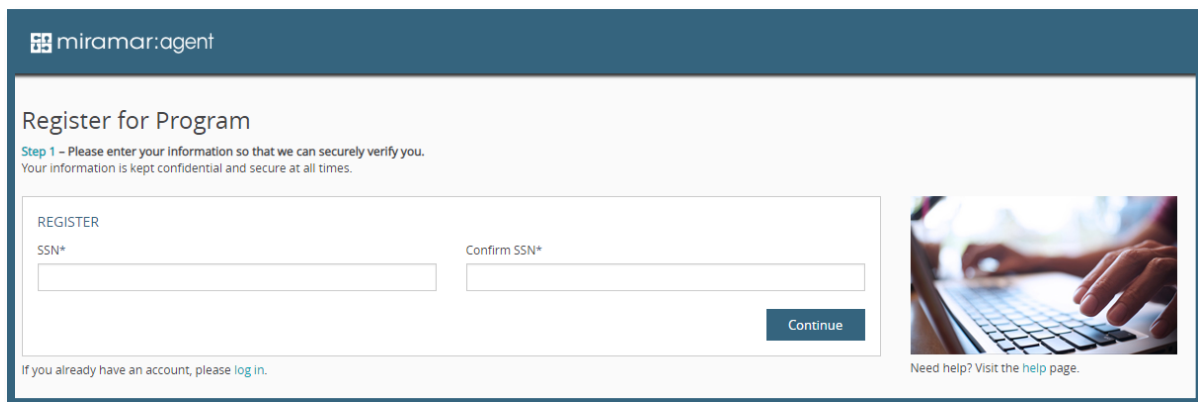


The screenshot shows the 'Welcome to Miramar:Agent' login page. At the top left is the 'miramar:agent' logo. The main heading is 'Welcome to Miramar:Agent'. Below it is a paragraph describing the software as a flexible, module-based solution for government managed care organizations. A link 'here' is provided for more information. Below the paragraph is a link 'Need help? Visit the help page.' In the center is a 'Log In' form with fields for 'Username' and 'Password', a 'Remember me?' checkbox, a 'Forgot your password?' link, and a 'Log In' button. A red arrow points to a 'Register as an Agent' button located below the 'Log In' button.

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.

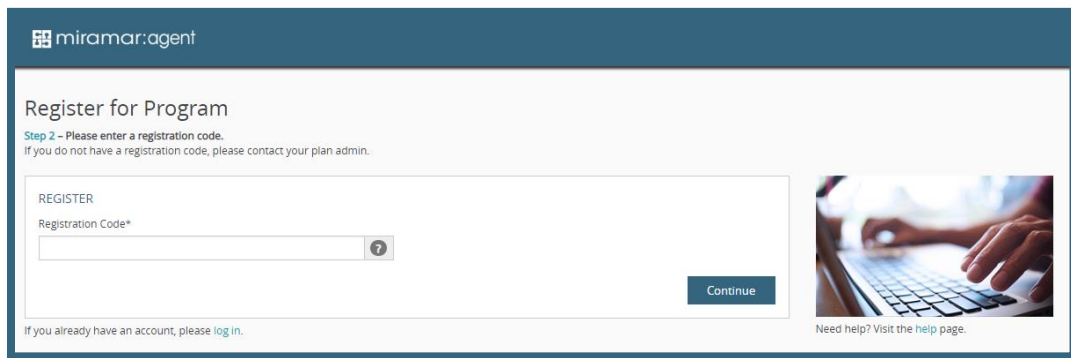


**IMPORTANT NOTE:** Failure to use a valid SSN could result in the inability to successfully complete a program, as the SSN is used for certain actions such as background checks.



The screenshot shows the 'Register for Program' screen. At the top left is the 'miramar:agent' logo. The main heading is 'Register for Program'. Below it is a sub-heading 'Step 1 - Please enter your information so that we can securely verify you.' and a note 'Your information is kept confidential and secure at all times.' The form has two input fields: 'SSN\*' and 'Confirm SSN\*'. A 'Continue' button is located to the right of the 'Confirm SSN\*' field. Below the form is a link 'If you already have an account, please log in.' On the right side of the screen is a small image of hands typing on a laptop keyboard. Below the image is a link 'Need help? Visit the help page.'

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.



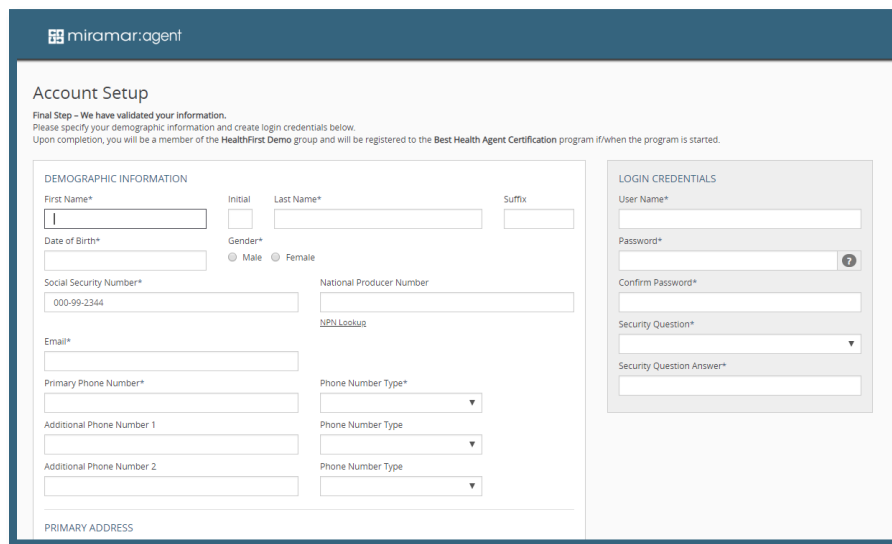
Enter your demographic information, a username, password, and security question and answer. All fields marked with an asterisk (\*) are required. Click **Complete Registration** once you have completed the form. Once you have completed registration, you will be taken to your agent dashboard.



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

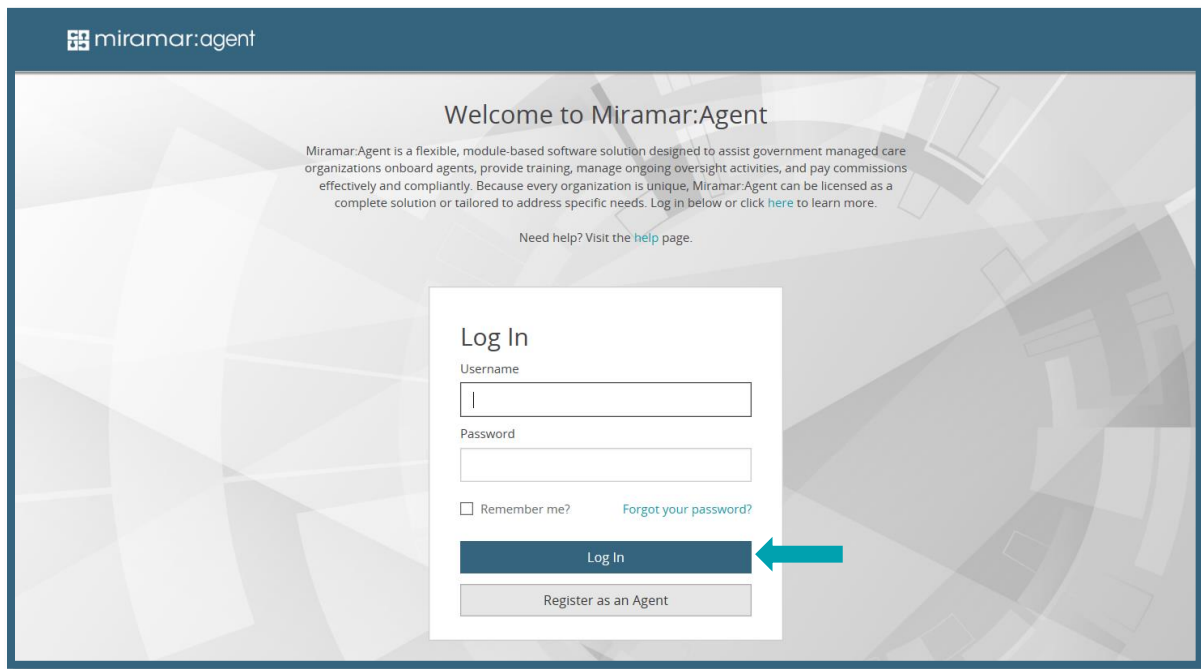


**HINT:** Passwords are required to contain a minimum of eight characters with at least one uppercase letter, one lowercase letter, one number, and one special character. Example: Password1#



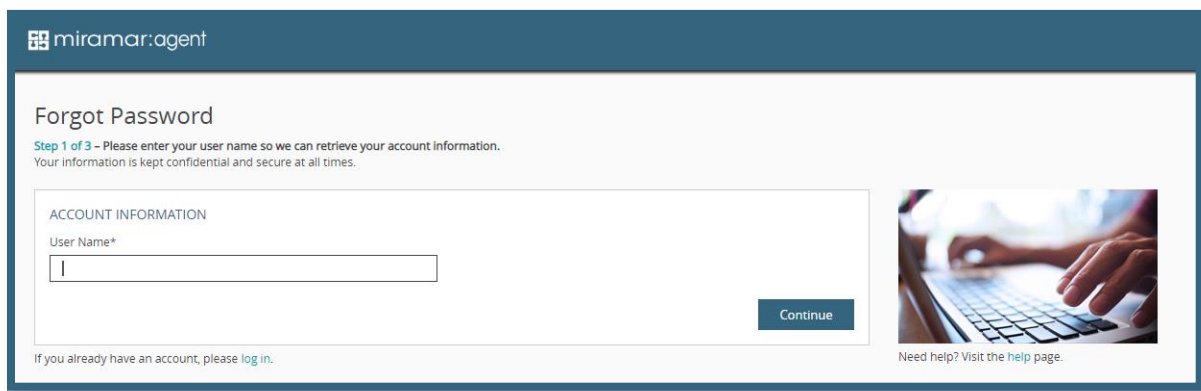
## How do I reset my password?

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**.



The screenshot shows the Miramar:Agent login interface. At the top, the header reads "miramar:agent". Below it, a welcome message states: "Welcome to Miramar:Agent. Miramar:Agent is a flexible, module-based software solution designed to assist government managed care organizations onboard agents, provide training, manage ongoing oversight activities, and pay commissions effectively and compliantly. Because every organization is unique, Miramar:Agent can be licensed as a complete solution or tailored to address specific needs. Log in below or click [here](#) to learn more. Need help? Visit the [help](#) page."

The central "Log In" form includes fields for "Username" and "Password", a "Remember me?" checkbox, and a link for "Forgot your password?". A teal arrow points to the "Log In" button. Below the button is a "Register as an Agent" link.



The screenshot shows the "Forgot Password" screen. The header reads "miramar:agent". The title is "Forgot Password". Below the title, it says "Step 1 of 3 - Please enter your user name so we can retrieve your account information. Your information is kept confidential and secure at all times."

The "ACCOUNT INFORMATION" section contains a "User Name\*" field with a single character entered. A "Continue" button is located to the right of the field. At the bottom left, a link says "If you already have an account, please [log in](#)." At the bottom right, a link says "Need help? Visit the [help](#) page." An image of hands typing on a laptop is on the right side of the screen.

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.

miramar:agent

### Forgot Password

Step 2 of 3 – Please answer the security question associated with your account. Then specify the last four digits of your SSN.


CONFIRM SECURITY QUESTION

What is the name of your first pet?

Last four digits of SSN\*

Continue

If you already have an account, please [log in](#).



Need help? Visit the [help](#) page.

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#

miramar:agent

### Forgot Password

Step 2 of 3 – Please answer the security question associated with your account. Then specify the last four digits of your SSN.


CONFIRM SECURITY QUESTION

What is the name of your first pet?

Last four digits of SSN\*

Continue

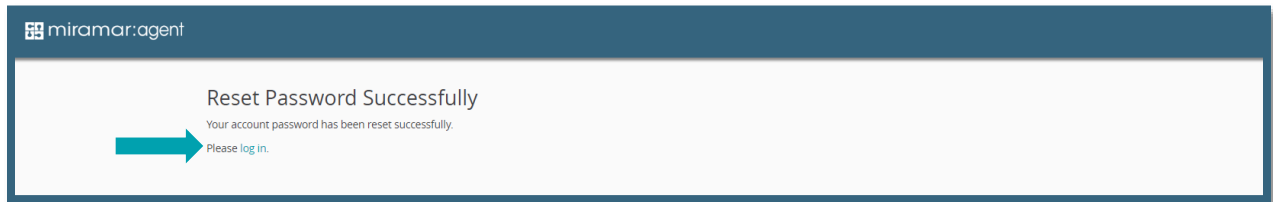
If you already have an account, please [log in](#).



Need help? Visit the [help](#) page.



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://*.gormanhealthgroup.com)
-  [https://\\*.teamsupport.com](https://*.teamsupport.com)
-  [https://\\*.miramar-agent.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.

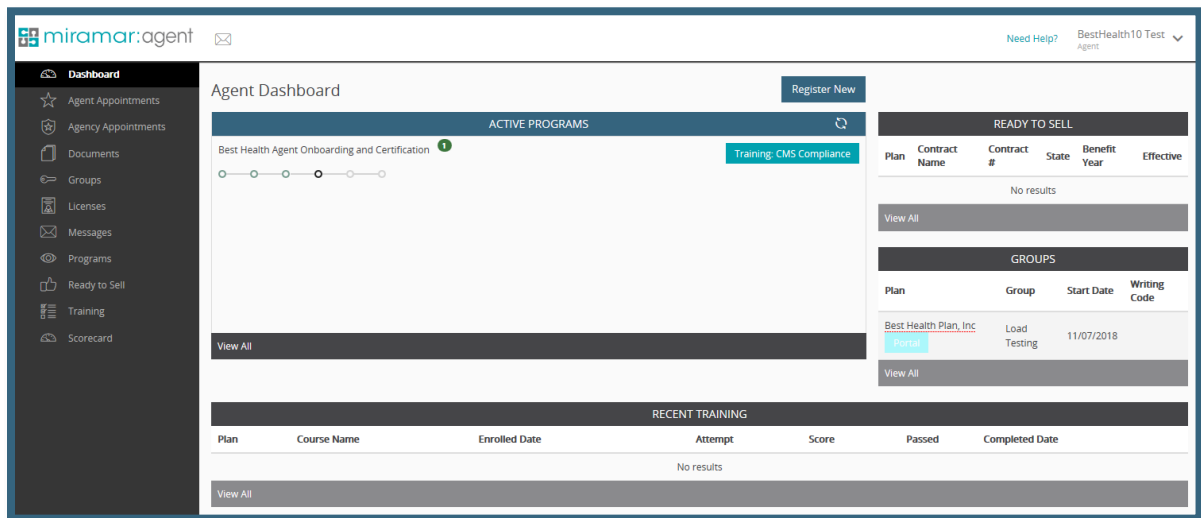
### III. AGENT DASHBOARD

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.



The screenshot shows the Miramar:Agent Agent Dashboard. The left sidebar contains navigation links: Dashboard, Agent Appointments, Agency Appointments, Documents, Groups, Licenses, Messages, Programs, Ready to Sell, Training, and Scorecard. The main content area is titled 'Agent Dashboard' and includes a 'Register New' button. It is divided into three main sections: 'ACTIVE PROGRAMS', 'READY TO SELL', and 'RECENT TRAINING'.

**ACTIVE PROGRAMS**

Best Health Agent Onboarding and Certification 1

Training: CMS Compliance

[View All](#)

**READY TO SELL**

Plan	Contract Name	Contract #	State	Benefit Year	Effective
No results					

[View All](#)

**GROUPS**

Plan	Group	Start Date	Writing Code
Best Health Plan, Inc.	Load Testing	11/07/2018	

[View All](#)

**RECENT TRAINING**

Plan	Course Name	Enrolled Date	Attempt	Score	Passed	Completed Date
No results						

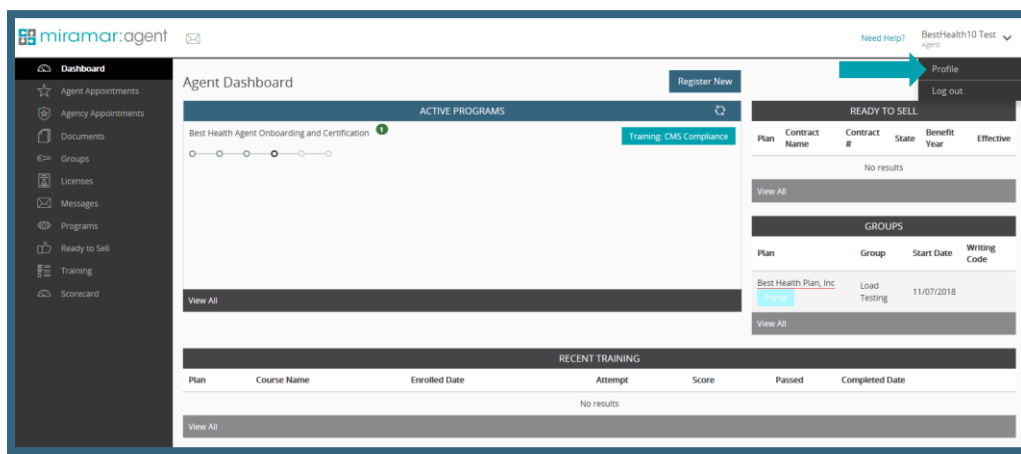
[View All](#)

## PROFILE MANAGEMENT

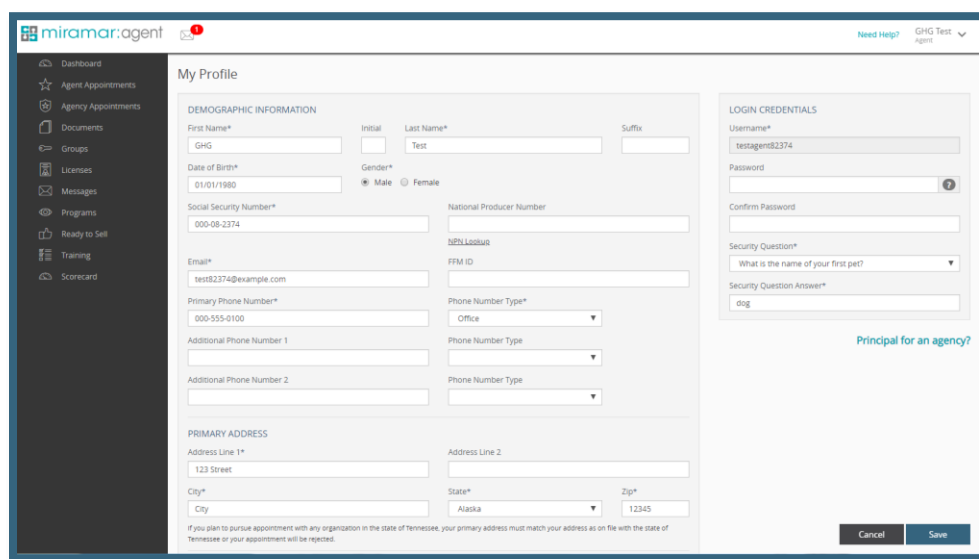
### How do I update my profile information?

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.



**My Profile**

**DEMOGRAPHIC INFORMATION**

First Name\* GHG Initial [ ] Last Name\* Test Suffix [ ]

Date of Birth\* 01/01/1980 Gender\* ☒ Male ☐ Female

Social Security Number\* 000-08-2374 National Producer Number [ ]

Email\* test@2374@example.com FFM ID [ ]

Primary Phone Number\* 000-555-0100 Phone Number Type\* Office

Additional Phone Number 1 [ ] Phone Number Type [ ]

Additional Phone Number 2 [ ] Phone Number Type [ ]

**PRIMARY ADDRESS**

Address Line 1\* 123 Street Address Line 2 [ ]

City\* City State\* Alaska Zip\* 12345

If you plan to pursue appointment with any organization in the state of Tennessee, your primary address must match your address as on file with the state of Tennessee or your appointment will be rejected.

**LOGIN CREDENTIALS**

Username\* testagent@2374

Password [ ]

Confirm Password [ ]

Security Question\* What is the name of your first pet?

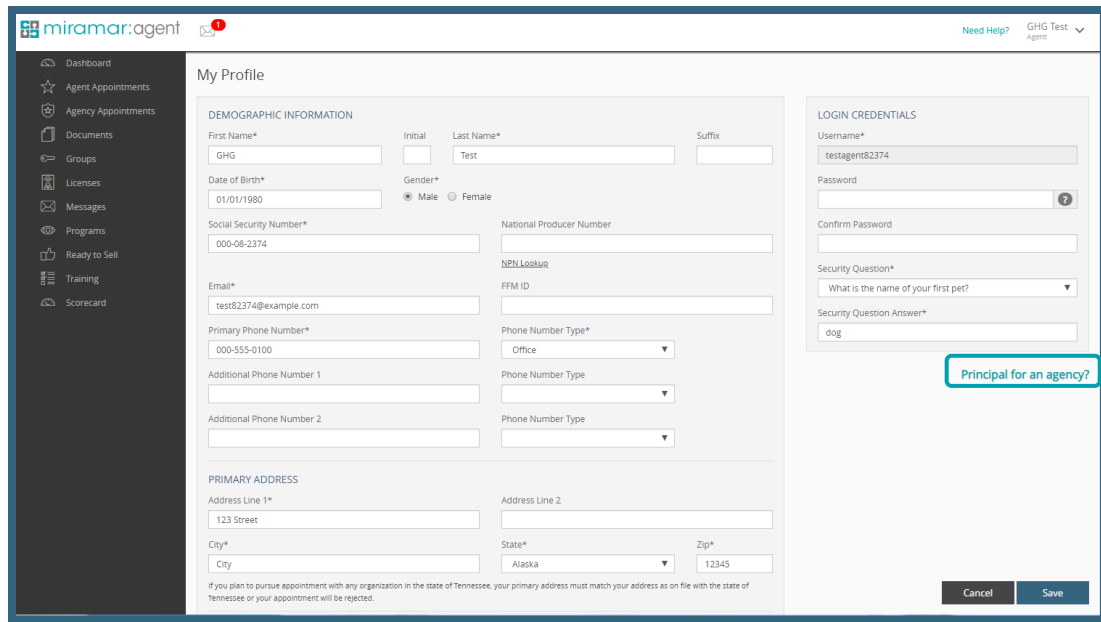
Security Question Answer\* dog

Principal for an agency?

Cancel Save

## How do I register as the principal of an agency?

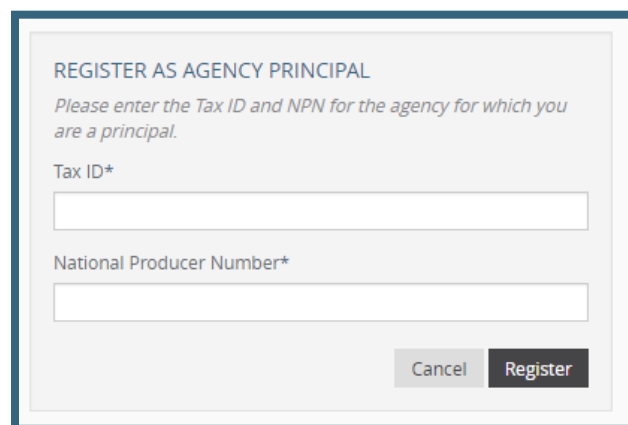
If you are an agency principal, you must register as an individual before you will be allowed to register as the principal of an agency. Once you have completed your individual profile, proceed to the *My Profile* page and click **Principal for an agency?**



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

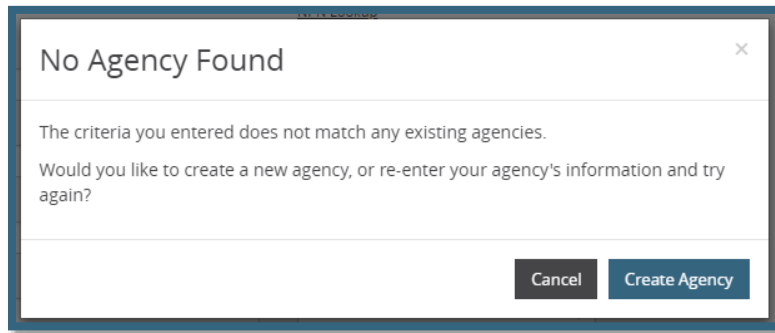


**IMPORTANT NOTE:** You must provide the *agency* NPN and *agency* Federal Employer Identification Number (FEIN). Both are validated during the initial license check. If they do not match the values provided by the National Producer Insurance Registry (NIPR), no data will be imported, and you will not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

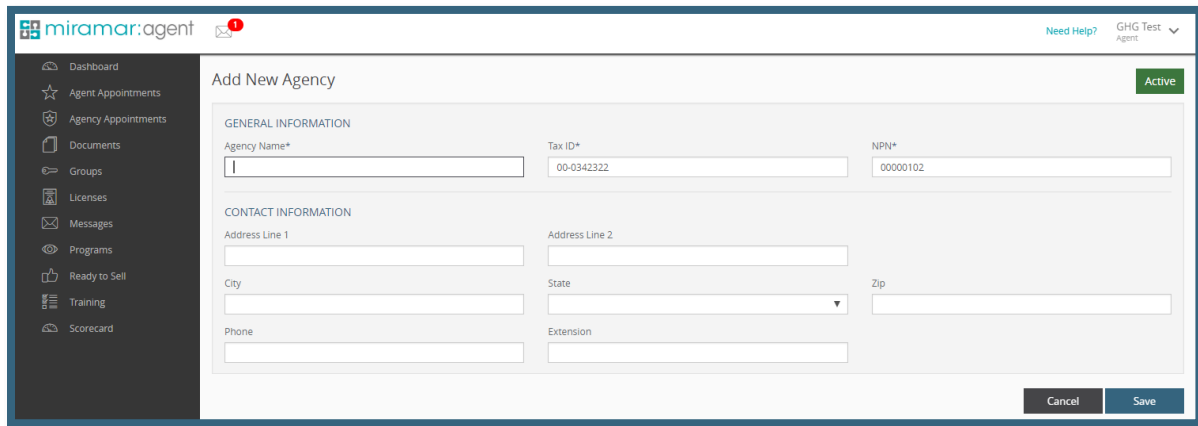


### *New agency in Miramar:Agent*

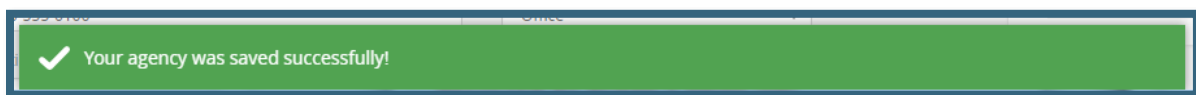
If the agency does not already exist in Miramar:Agent, a new agency will need to be created. Click **Create Agency**.



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.

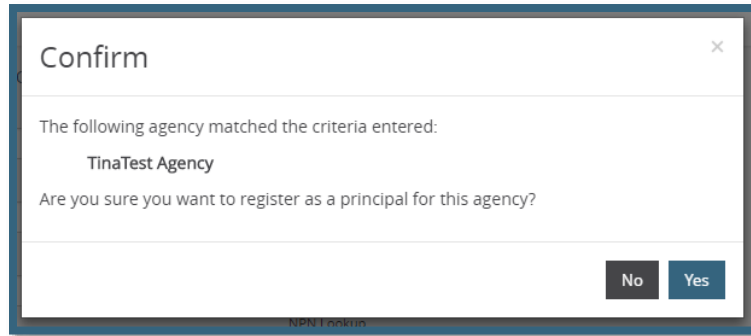


Once the agency has successfully saved, you will see the message below at the bottom of your screen.



### 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**.



**Confirm**

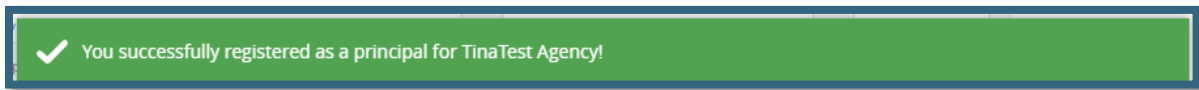
The following agency matched the criteria entered:

**TinaTest Agency**

Are you sure you want to register as a principal for this agency?

No Yes

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

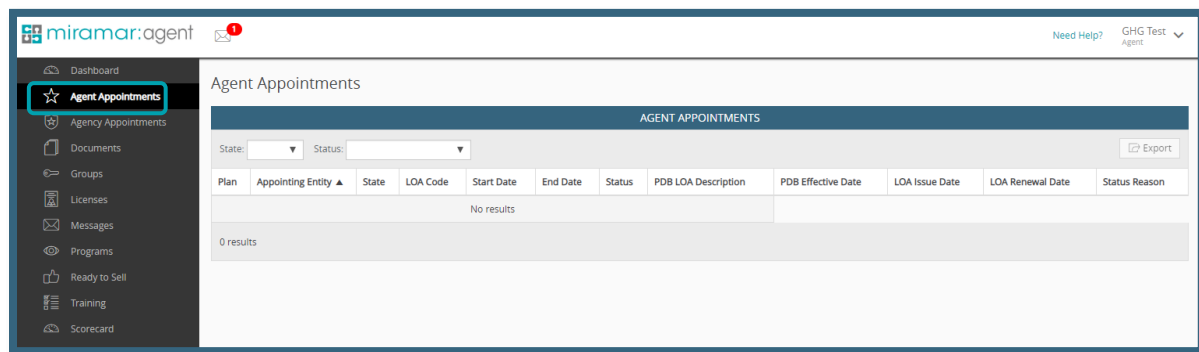


## AGENT APPOINTMENTS

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.



**miramar:agent** Need Help? GHG Test Agent

Dashboard

**Agent Appointments**

Agency Appointments

Documents

Groups

Licenses

Messages

Programs

Ready to Sell

Training

Scorecard

Agent Appointments

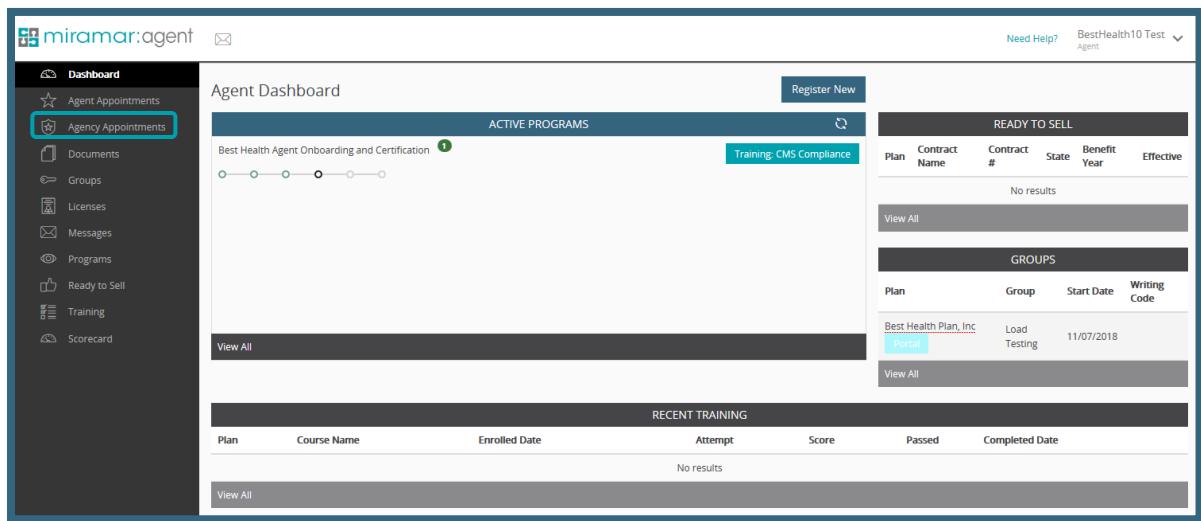
AGENT APPOINTMENTS

State: Status: Export

Plan	Appointing Entity	State	LOA Code	Start Date	End Date	Status	PDB LOA Description	PDB Effective Date	LOA Issue Date	LOA Renewal Date	Status Reason
No results											
0 results											

## 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.



The screenshot shows the 'miramar:agent' dashboard. On the left is a sidebar menu with options: Dashboard, Agent Appointments, Agency Appointments (highlighted), Documents, Groups, Licenses, Messages, Programs, Ready to Sell, Training, and Scorecard. The main content area is titled 'Agent Dashboard' and includes a 'Register New' button. It features three main sections: 'ACTIVE PROGRAMS' with a progress bar for 'Best Health Agent Onboarding and Certification' and a 'Training: CMS Compliance' button; 'READY TO SELL' with a table showing no results; and 'RECENT TRAINING' with a table showing no results. A 'View All' button is present at the bottom of the 'RECENT TRAINING' section.

Plan	Contract Name	Contract #	State	Benefit Year	Effective
No results					

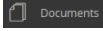
  

Plan	Group	Start Date	Writing Code
Best Health Plan, Inc.	Load Testing	11/07/2018	

Plan	Course Name	Enrolled Date	Attempt	Score	Passed	Completed Date
No results						

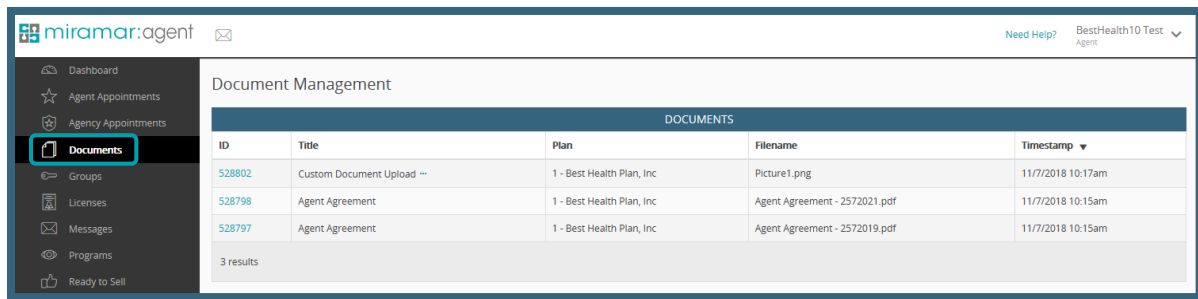
## DOCUMENTS

To view your uploaded and saved documents, click into  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 ✗, or not yet reviewed ... . You can hover over the icon to view the status description.



The screenshot shows the 'miramar:agent' interface. On the left is a sidebar menu with options: Dashboard, Agent Appointments, Agency Appointments, **Documents** (highlighted with a red box), Groups, Licenses, Messages, Programs, and Ready to Sell. The main content area is titled 'Document Management' and contains a table of documents.

DOCUMENTS				
ID	Title	Plan	Filename	Timestamp ▼
528802	Custom Document Upload ...	1 - Best Health Plan, Inc	Picture1.png	11/7/2018 10:17am
528798	Agent Agreement	1 - Best Health Plan, Inc	Agent Agreement - 2572021.pdf	11/7/2018 10:15am
528797	Agent Agreement	1 - Best Health Plan, Inc	Agent Agreement - 2572019.pdf	11/7/2018 10:15am

3 results

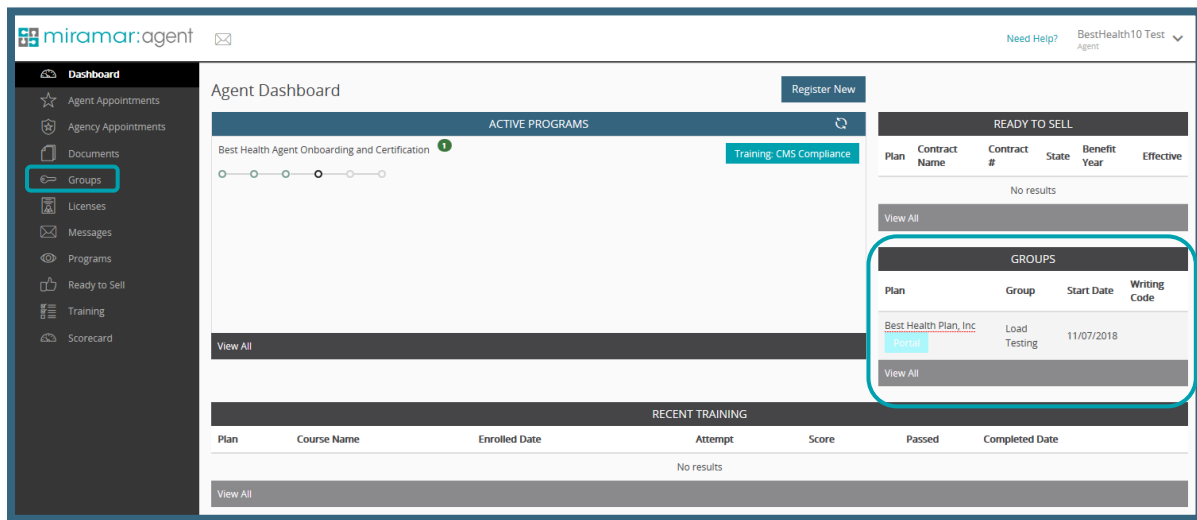


**How do I upload a certificate or document?** For information on how to upload documents within a program, see the section on *Program Navigation*.



## GROUPS

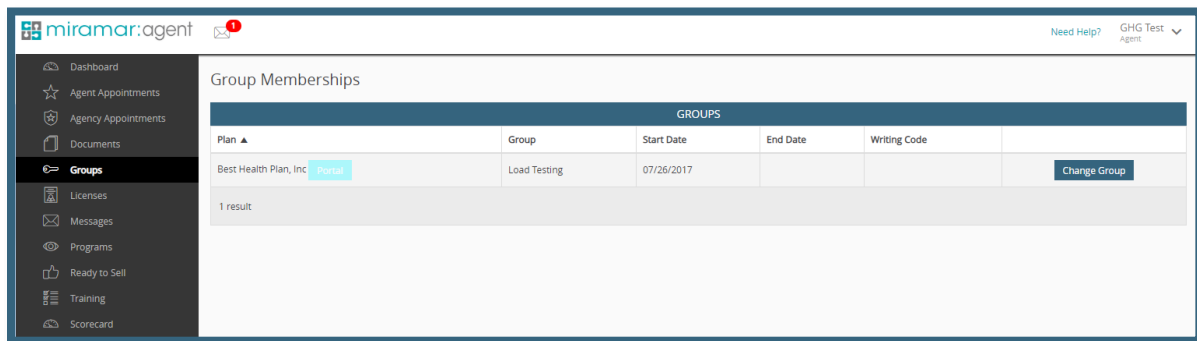
To view a full history of your group affiliations for your plans, click **Groups** in the Dashboard menu to the left of the screen. The widget on your Dashboard will provide a snapshot of the groups with which you are currently associated.



The screenshot shows the Miramar:agent dashboard. In the left sidebar, the 'Groups' option is highlighted with a red box. The main content area displays the 'Agent Dashboard' with a 'Groups' widget highlighted by a red box. This widget shows a table of group affiliations:

Plan	Contract Name	Contract #	State	Benefit Year	Effective
No results					
<a href="#">View All</a>					

Below this, there is a 'RECENT TRAINING' section with a table showing training history.



The screenshot shows the 'Group Memberships' page in the Miramar:agent dashboard. It displays a table of group affiliations:

Plan	Group	Start Date	End Date	Writing Code
Best Health Plan, Inc. <a href="#">Portal</a>	Load Testing	07/26/2017		
<a href="#">Change Group</a>				

Below the table, it indicates '1 result'.

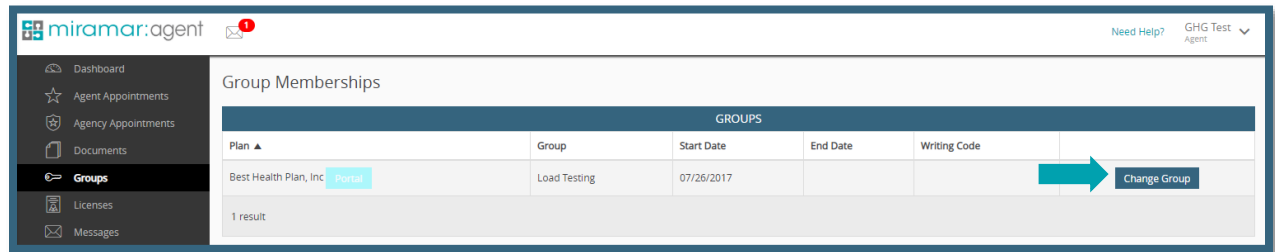
### How do I request a group change?

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.

Confirm

Are you sure you want to leave the **Load Testing** group?

If so, please specify the code of the group you'd like to switch to and click "Change Group".

Code\*

Cancel

Change Groups



## 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:

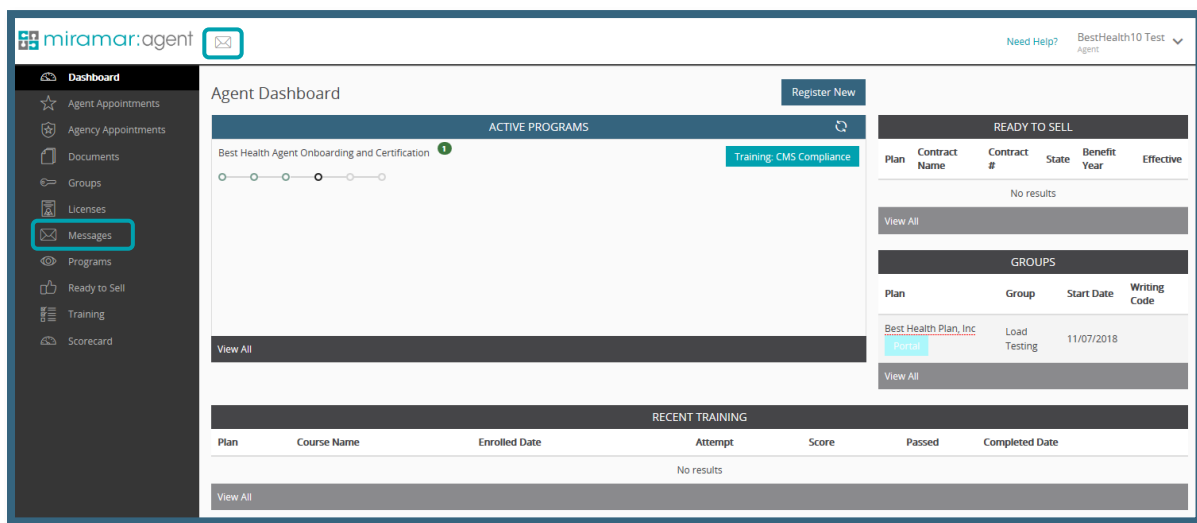
-  Active
-  Due Soon
-  Expired

License Management												
LICENSES												
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.

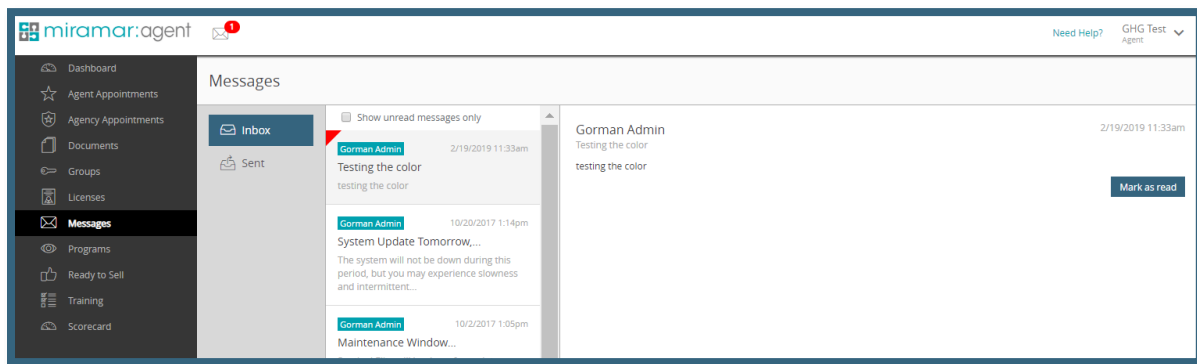
The envelope icon at the top left of the Agent Dashboard will display in a red bubble how many unread messages you have.



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.



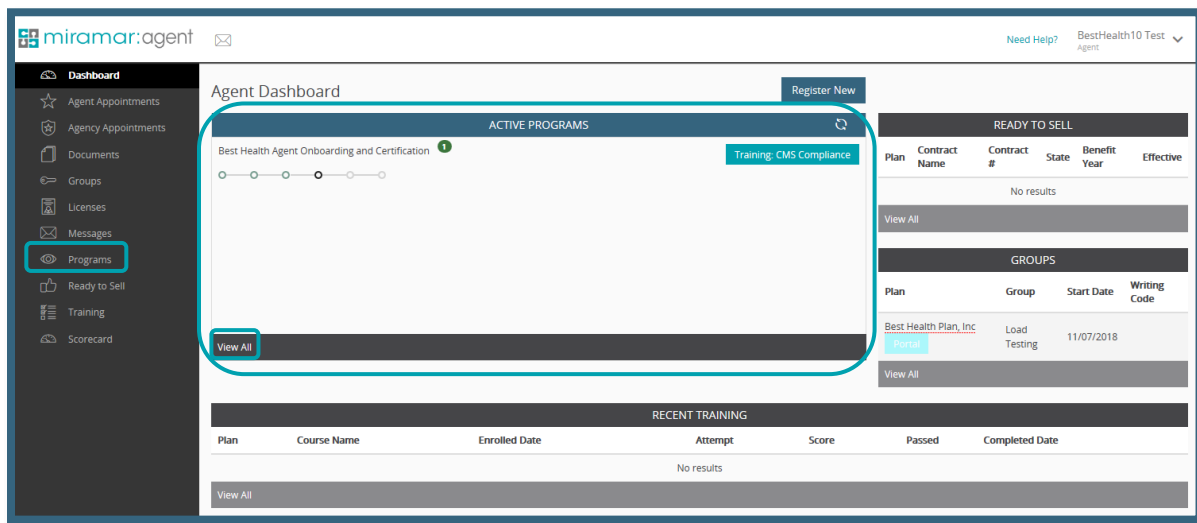
**NOTE:** Some messages are sent as informational only and will not allow a reply.



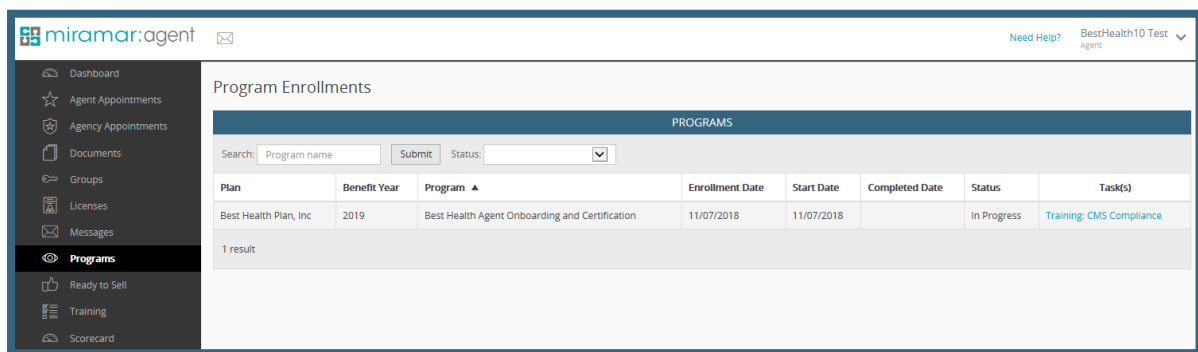
## PROGRAMS

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.



Plan	Benefit Year	Program	Enrollment Date	Start Date	Completed Date	Status	Task(s)
Best Health Plan, Inc	2019	Best Health Agent Onboarding and Certification	11/07/2018	11/07/2018		In Progress	Training: CMS Compliance



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

## READY TO SELL

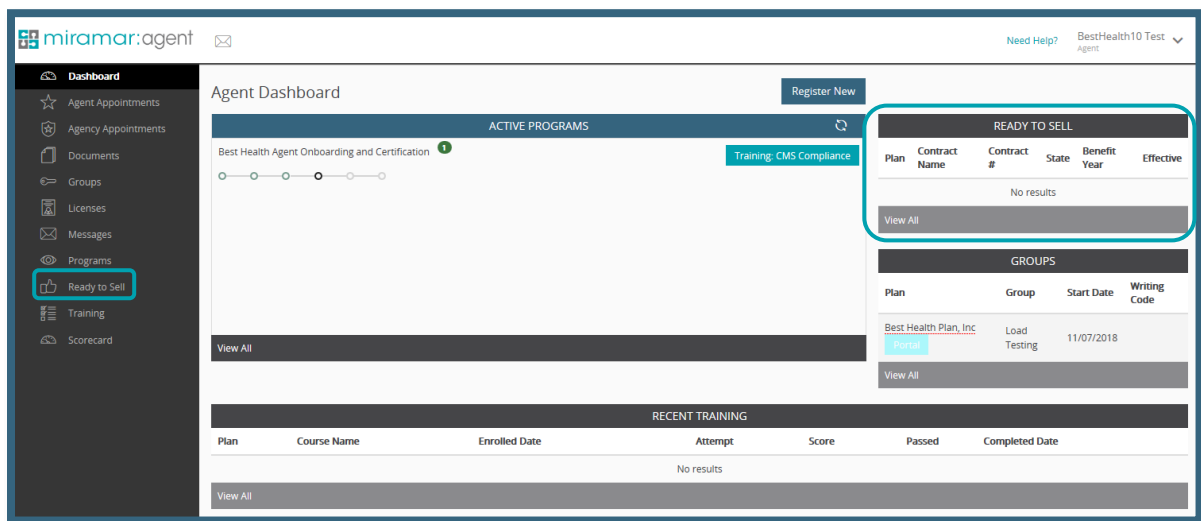
To view a snapshot of the contracts for which you are Ready to Sell (RTS) for the current and upcoming benefit, view the *Ready to Sell* widget on the right side of the Dashboard. To view a full RTS history, click into **View All** from the RTS widget or **Ready to Sell** from the Dashboard menu.

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

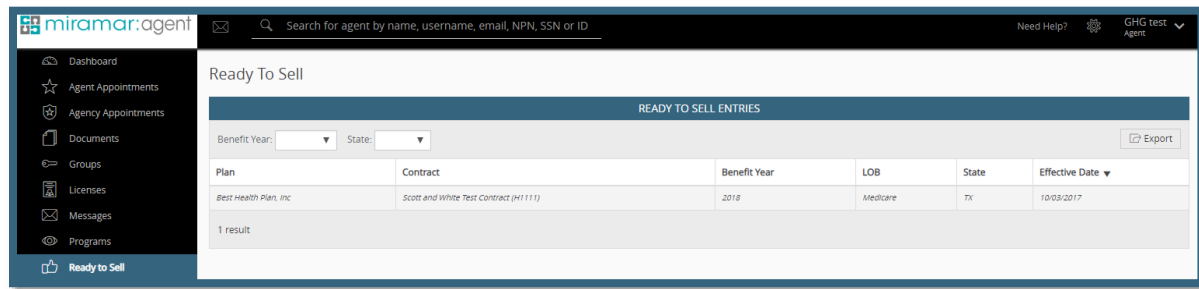


**NOTE:** Not all plans use the RTS functionality in Miramar:Agent. If this is the case for the plan(s) whose program(s) you have completed, this section of the Agent Dashboard will not have any records.



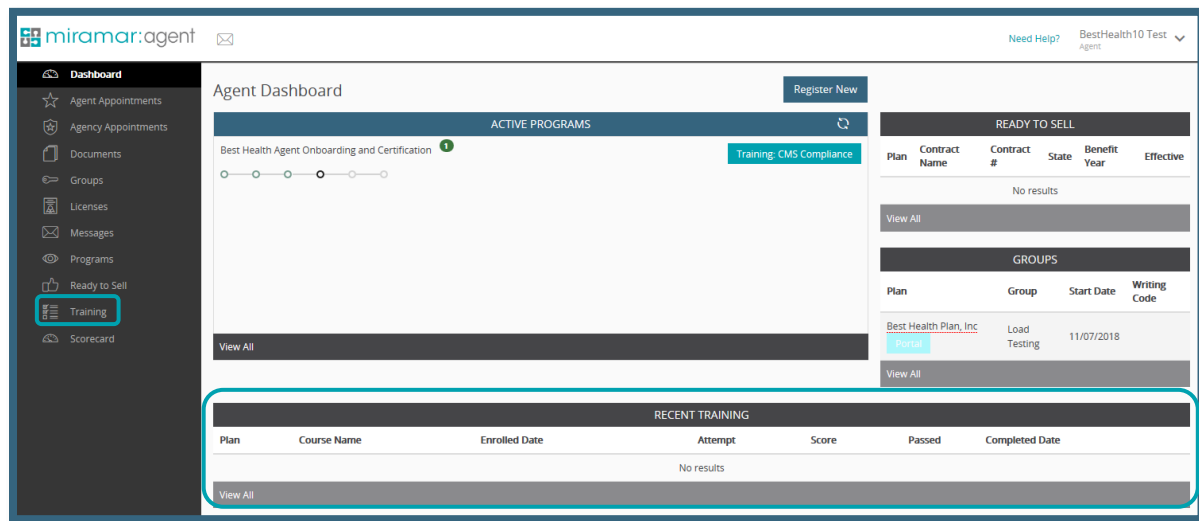
The screenshot shows the Miramar:agent Agent Dashboard. The left sidebar contains a menu with items: Dashboard, Agent Appointments, Agency Appointments, Documents, Groups, Licenses, Messages, Programs, **Ready to Sell** (highlighted), Training, and Scorecard. The main content area is titled "Agent Dashboard" and includes a "Register New" button. It features three main sections: "ACTIVE PROGRAMS" (showing "Best Health Agent Onboarding and Certification" with a progress bar and a "Training: CMS Compliance" button), "READY TO SELL" (a table with columns: Plan, Contract Name, Contract #, State, Benefit Year, Effective; showing "No results" and a "View All" link), and "RECENT TRAINING" (a table with columns: Plan, Course Name, Enrolled Date, Attempt, Score, Passed, Completed Date; showing "No results" and a "View All" link). The "READY TO SELL" table is highlighted with a red box in the original image.

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								
Search: <input type="text" value="Course name"/>		Benefit Year: <input type="text" value=""/>	Passed: <input type="text" value=""/>	<a href="#">Export</a>				
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								



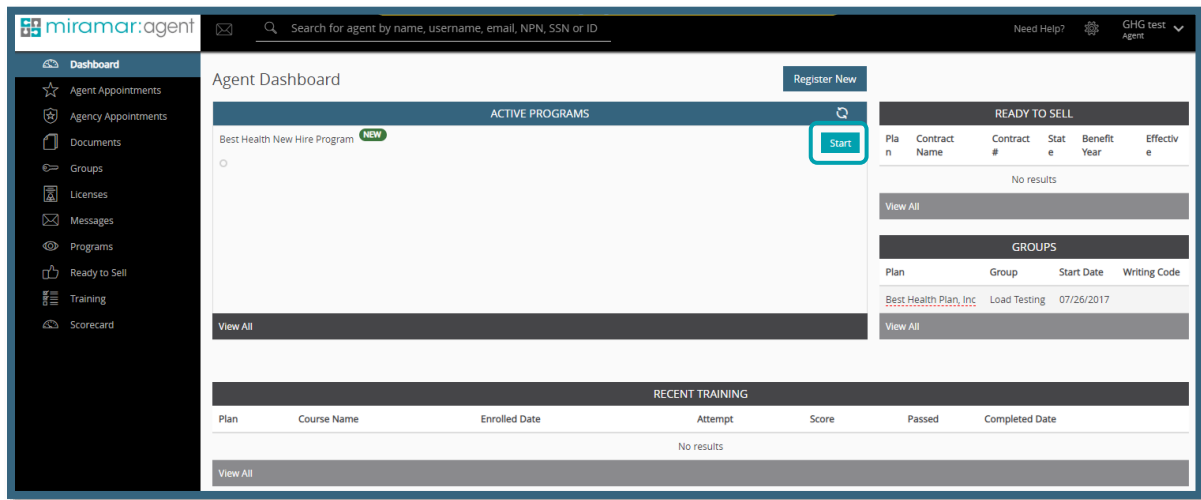
## IV. PROGRAM NAVIGATION

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

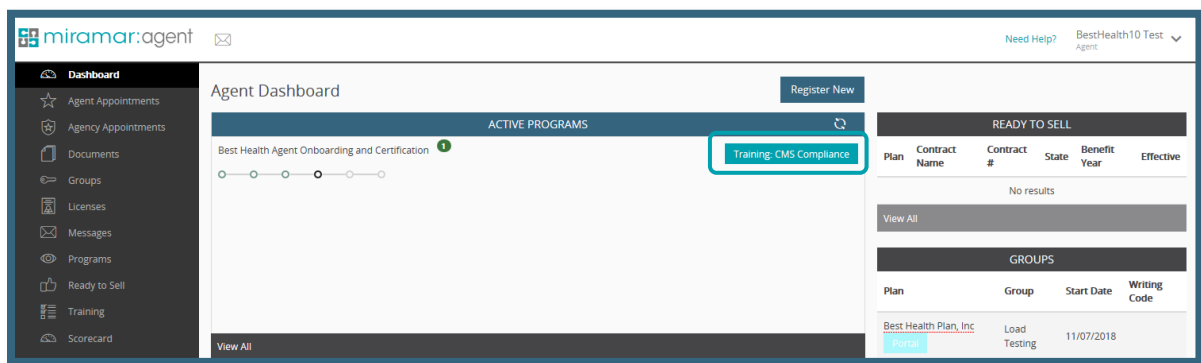
To the right of the program name, you will see a green button indicating the next action required. If you have not yet started the program, click the green **Start** button to begin the program.



**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.



The screenshot shows the 'miramar:agent' Agent Dashboard. The left sidebar contains navigation links: Dashboard, Agent Appointments, Agency Appointments, Documents, Groups, Licenses, Messages, Programs, Ready to Sell, Training, and Scorecard. The main content area is titled 'Agent Dashboard' and includes a 'Register New' button. The 'ACTIVE PROGRAMS' section lists the 'Best Health New Hire Program' with a green 'NEW' badge and a green 'Start' button. Below this are sections for 'READY TO SELL' (no results), 'GROUPS' (listing 'Best Health Plan, Inc.' with 'Load Testing' on 07/26/2017), and 'RECENT TRAINING' (no results).

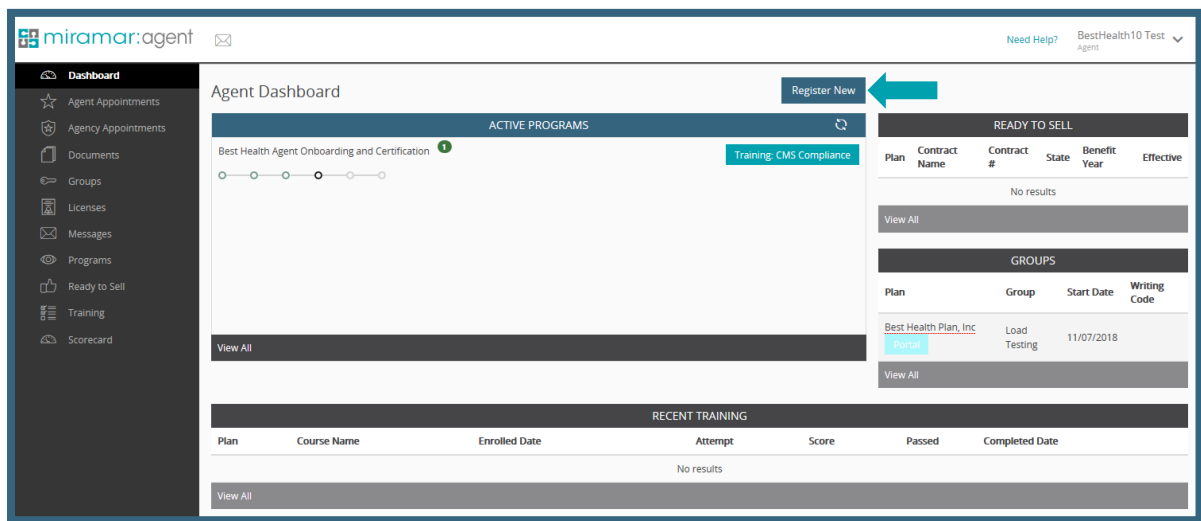


The screenshot shows the 'miramar:agent' Agent Dashboard. The left sidebar is the same as the previous screenshot. The main content area is titled 'Agent Dashboard' and includes a 'Register New' button. The 'ACTIVE PROGRAMS' section lists the 'Best Health Agent Onboarding and Certification' program with a green progress bar and a green 'Training: CMS Compliance' button. Below this are sections for 'READY TO SELL' (no results), 'GROUPS' (listing 'Best Health Plan, Inc.' with 'Load Testing' on 11/07/2018), and 'RECENT TRAINING' (no results).

## 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.

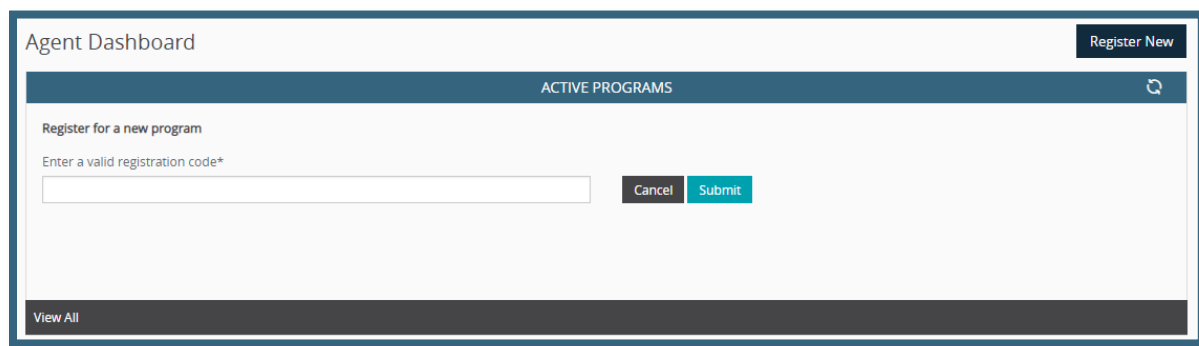
If you were provided a program registration PIN code by your plan or upline, you can register by clicking the **Register New** button at the top of your screen.



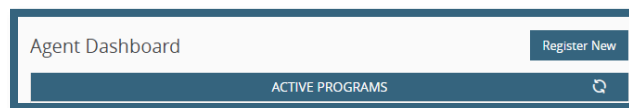
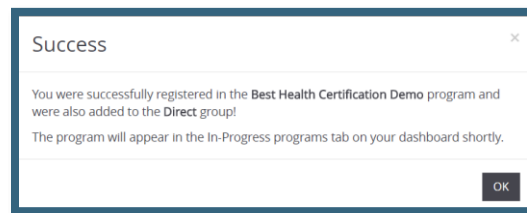
Once you click *Register New*, you will be prompted to enter the program registration PIN code provided by your plan or upline. Click **Submit** to complete the registration. PIN codes are not case sensitive.



**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.

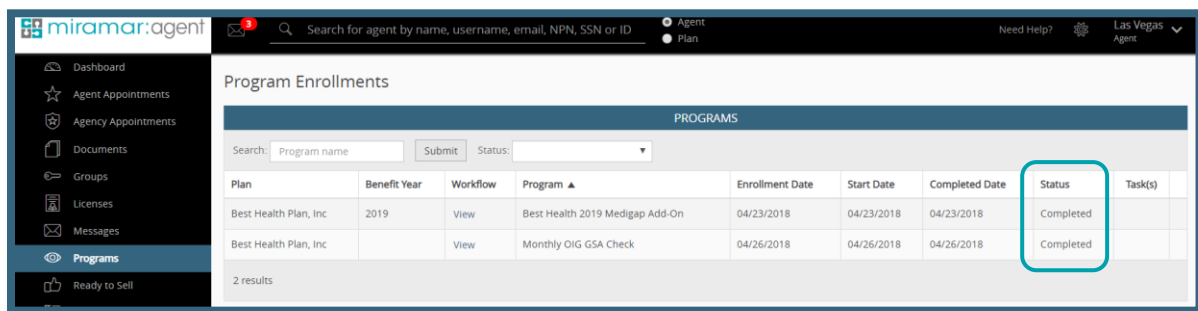


The following screen will pop up to show you have registered successfully. After clicking **OK**, you can click the *refresh icon* in the top right corner of the Active Programs widget to see the new program on your dashboard.



### 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.



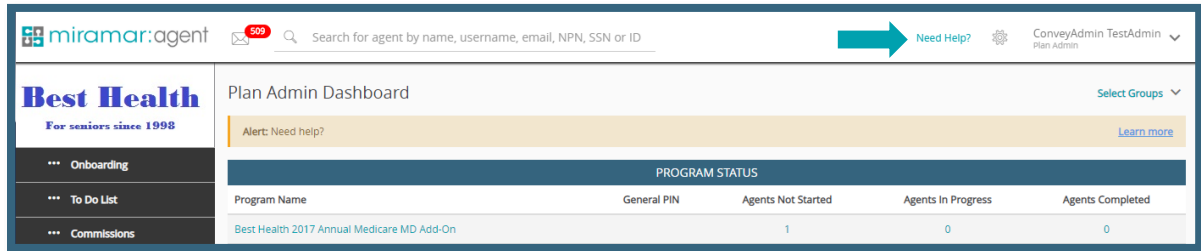
The screenshot shows the "miramar:agent" dashboard. The left sidebar contains a menu with items: Dashboard, Agent Appointments, Agency Appointments, Documents, Groups, Licenses, Messages, **Programs** (highlighted), and Ready to Sell. The main content area is titled "Program Enrollments" and features a table of programs. A search bar at the top of the table allows filtering by "Program name" and "Status". The table has columns for Plan, Benefit Year, Workflow, Program, Enrollment Date, Start Date, Completed Date, Status, and Task(s). Two rows are visible, both with a status of "Completed". A red box highlights the "Status" column header and the "Completed" status values in the two rows.

Plan	Benefit Year	Workflow	Program	Enrollment Date	Start Date	Completed Date	Status	Task(s)
Best Health Plan, Inc.	2019	View	Best Health 2019 Medigap Add-On	04/23/2018	04/23/2018	04/23/2018	Completed	
Best Health Plan, Inc.		View	Monthly OIG GSA Check	04/26/2018	04/26/2018	04/26/2018	Completed	

2 results

## 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.

