



Broker Recertification training for EnvisionRxPlus for 2020

Recertifying for 2020 Reference Guide

GETTING STARTED: What you will need

LOA / Non-Commissionable - Your baseline commissions area paid to your upline

- New 2020 AHIP, FWA or other Qualified certificate
- A copy of your current Errors and Omissions Insurance Policy (E&O)

Commissionable - You get your own commissions

- New 2020 AHIP, FWA or other Qualified certificate
- A copy of your current Errors and Omissions Insurance Policy (E&O)
- please note if changing any bank account information, contact Agent Support at EnvisionAgentSupport@Envisionrx.com to make those changes.

Recertification for 2020 Reference Guide

1 - Invitation Email

You will receive an email:

FROM: "envisionagentsupport@envisionrx.com"

SUBJECT: EnvisionRxPlus Recertification Invitation

This will contain your link to start to recertify for the 2020 plan year.

Click the [Login](#) link when ready to begin Remember your DOMAIN will ALWAYS be ENRX

Dear Lori Smith,

You have been invited to recertify as an agent with Envision Insurance to sell EnvisionRxPlus PDP through (*Your Hierarchy name here*). Please use the information below to complete your application online.

Before you begin the recertification process, you will need the following information to upload:

- Your New 2020 AHIP, FWA, or other qualified certificate.
- A copy of your current Errors and Omissions Insurance Policy (E&O)

Using the User ID and password provided here, click Login to get started.

Your username will remain the same, you will be prompted to change your password upon initial login, **the domain will be enr**.

Site URL	Login ←
User ID	joklein@envisionrx.com
Password	Cald418265
Domain	enrx

2 – Login

The User ID in your invitation email is your Login Name.(your email)

You will be asked to change your password on your first login.

The value for the **DOMAIN is Always ENRX**

Enter your credentials and press Submit.



CallidusCloud
Workflow
by CallidusCloud

Please login!

Login Name *
user@example.com

Password *

Domain
enrx [change]

Submit

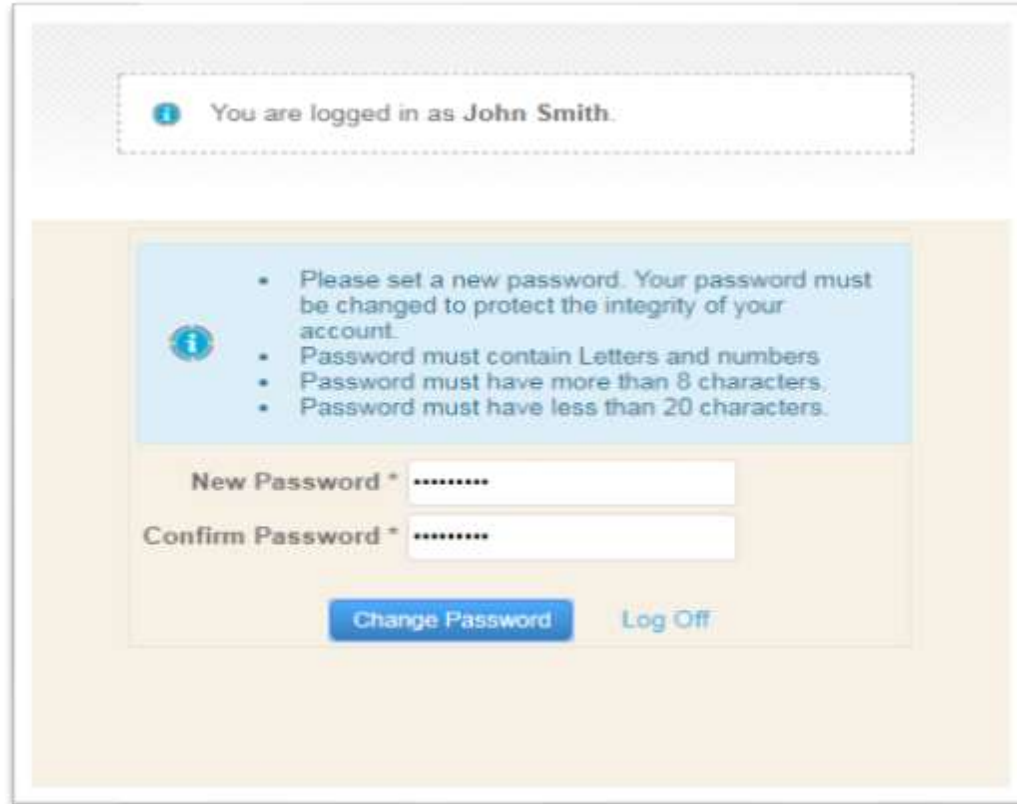
Remember me

[Forgot your password?](#)

3 - Reset Password

Create a new password to continue.

Between 8-20 characters must contain both letters and numbers



The screenshot displays a user interface for password reset. At the top, a notification box indicates the user is logged in as John Smith. Below this, a light blue box contains instructions for creating a new password, including requirements for length and character types. Two input fields for 'New Password' and 'Confirm Password' are provided, both masked with dots. At the bottom, there are buttons for 'Change Password' and 'Log Off'.

i You are logged in as John Smith.

i

- Please set a new password. Your password must be changed to protect the integrity of your account.
- Password must contain Letters and numbers
- Password must have more than 8 characters.
- Password must have less than 20 characters.

New Password *

Confirm Password *

[Change Password](#) [Log Off](#)

4 – Open the Application

Once you log on, you will see the application link

Click the blue link under the “Application” column to open your onboarding application.



The screenshot shows a table with a header row and one data row. The header row has two columns: 'Application' and 'Applicant'. The data row has 'Recertification-OB-118' in the 'Application' column and 'Funk: 06/24/2019' in the 'Applicant' column. A blue arrow points to the 'Recertification-OB-118' link.

Application	Applicant
Recertification-OB-118	Funk: 06/24/2019

5 – Confirm your NPN

Recertifying Agents will need to confirm their NPN and check the box authorizing Callidus Cloud to request a NIPR report. When you hit submit, it will pull that information on you from NIPR

Confirm your NPN and hit Submit to retrieve your information from ICM(INCENTIVE COMPENSATION MANAGEMENT)



NPN *

123456



Submit

6 - General Tab

You'll now be taken to the main body of your recertification application.

Many fields on your application will already be completed with the information returned from the National Insurance Producer Registry (NIPR) PDB report.

PLEASE VERIFY this information is still correct. You can change any of it **only on this page**.

If you see an asterisk * by any fields, that means that information is required

Please hit "SAVE" on the bottom of every page before moving to the next TAB.

IF you omitted any required information on any of the tabs, you will see "incomplete" in RED will remain on that tab. Please go back and complete. You will be unable to submit at the end if there are any "incomplete" on any tabs

6 - General Tab continued

You will begin on the General tab. Update and add information as needed, hit “SAVE” on the bottom of the page and then can hit the *Next* button at the bottom.

There are multiple fields on this page, most of them must be completed, reviewed and confirmed. If you need to change any information, this is the page to make those changes such as email address, phone number etc.

The screenshot shows a web form with the following sections and fields:

- Navigation:** General (highlighted), Insurance, Education, Certifications, Submit.
- Message:** The information below was pulled from ICM (INCENTIVE COMPENSATION MANAGEMENT). If any of this information has changed, please update it now. Items with an * must be completed if not already filled in.
- Personal Information:** Product Type (agent), First Name (*), Last, Middle Name, Initial, Last Name (*), Social Security (*), Date of Birth (*), Gender (Female, Male, Other), NPI (*), Contact Email (*), NPI Email, ITM ID.
- Residential Address:** Residential Address Line 1 (*), Residential Address Line 2, City (*), State (*), ZIP (*), Business Phone (*), Primary Phone Number (*), Primary Phone Number Type, Additional Phone Number 1, Phone Number Type, Additional Phone Number 2, Phone Number Type.
- Additional Addresses:** Is your business address the same as your residential address? (Yes/No), Business Address Line 1, Business Address Line 2, Business City, Business State, Business Zip. Similar fields for Mailing Address.
- Buttons:** Next (with arrow), Save, Submit.

7 – Insurance Tab

Provide all required E&O insurance information and upload a copy of your policy certificate.

Please fill out the application below. If you wish to save your progress and complete the application later, click Save and log back in at any time. If you have completed the application, please navigate to the Submit tab and press the blue Submit button. You will be contacted shortly.

Please click the NEXT button at bottom to continue your onboarding process.

General Insurance Education Certifications Submit

Please provide your E&O insurance information below and upload your E&O certificate. Items with an * must be completed if not already filled in.

Insurance Name *

Policy Number *

Effective Date *

Expiration Date *

The minimum per occurrence limit is 500,000.

Per Occurrence Limit *

The aggregate limit must be at least 500,000.

Aggregate Limit *

E&O Upload *



Save

Upload Button

8 - Education Tab

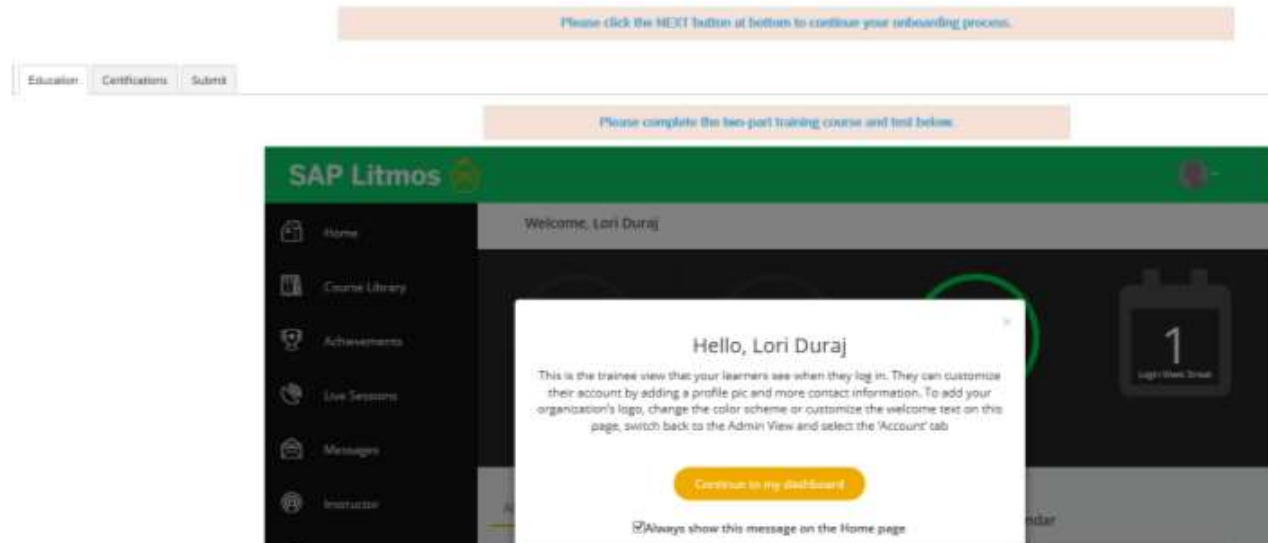


Select the Education tab at the top in your workflow

This will take you to another site called LITMOS for the training course and then the test



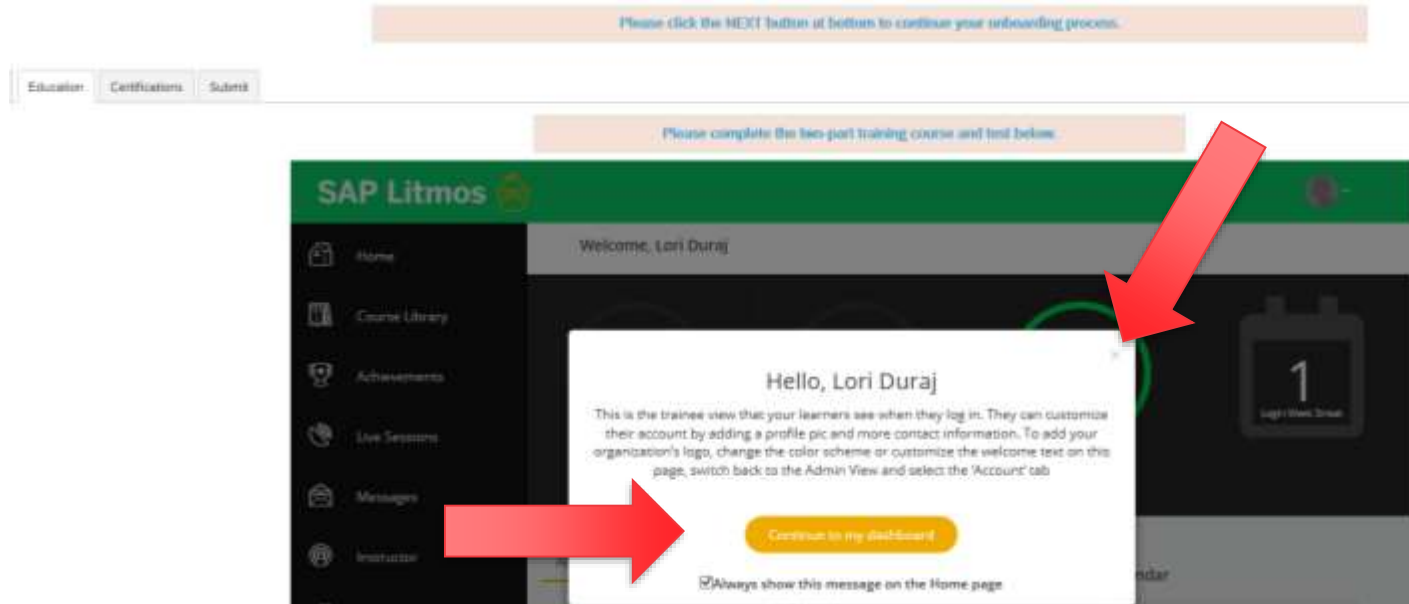
- If you get a log in screen for Litmos this is an error. At no point should you have to register for a Litmos account or free trial. Do not sign up! Contact envisionagentsupport@envisionrx.com



8 - Education Tab

Complete the Litmos training module(s) provided and take a short test.

- Hit Continue or the X out of the Hello, box to start your training



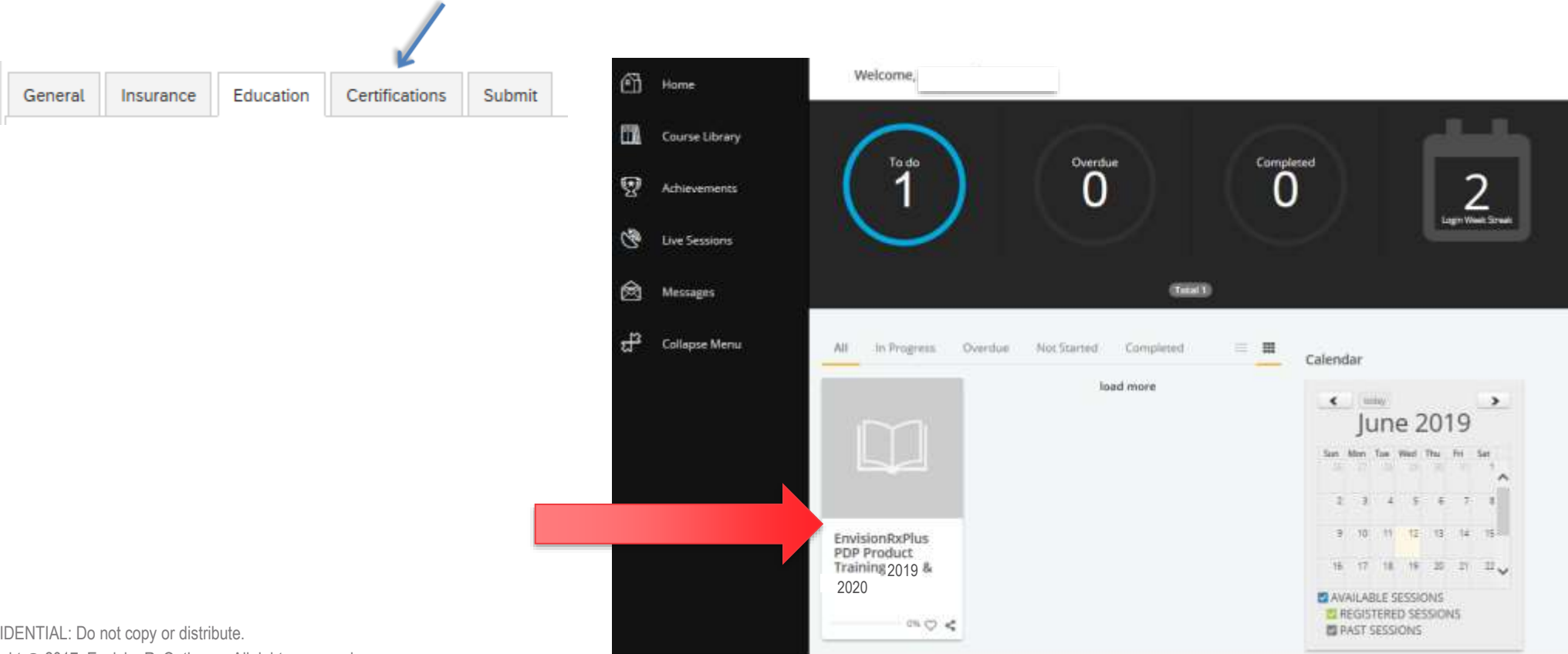
- AGAIN: If you get a log in screen for Litmos this is an error. At no point should you have to register for a Litmos account or free trial. Do not sign up! Contact envisionagentsupport@envisionrx.com

8 - Education Tab cont.

Click either on the image of the book or the words: **EnvisionRxPlus PDP Product Training 2020**, to start the training. Training has to be completed before you can take the test. It won't allow you to just skip to the test

Must pass the test within 3 attempts with a 85% score
If not able to pass in 3 attempts, you have to wait 6 months to try again.

When completed, **scroll UP to the Workflow Tab list to continue the onboarding. Certifications tab is next**



9 – Certifications Tab

Select the radio button corresponding to the certifications you have; this will cause the relevant fields to display.

Using the **BLUE UP ARROW**, Upload your new 2020 certification, enter a completion date.

Please fill out the application below. If you wish to save your progress and complete the application later, click Save and log back in at any time. If you have completed the application, please navigate to the Submit tab and press the blue Submit button. You will be contacted shortly.

Please click the NEXT button at bottom to continue your onboarding process.

General Insurance Education Certifications Submit

Upload all relevant certifications. Items with an * must be completed if not already filled in.

Select the certifications you have AHIP, FWA, Compliance Certification
 OTHER

Save

Please fill out the application below. If you wish to save your progress and complete the application later, click Save and log back in at any time. If you have completed the application, please navigate to the Submit tab and press the blue Submit button. You will be contacted shortly.

Please click the NEXT button at bottom to continue your onboarding process.

General Insurance Education Certifications Submit

Upload all relevant certifications. Items with an * must be completed if not already filled in.

Select the certifications you have * AHIP, FWA, Compliance Certification
 OTHER

AHIP, FWA, Compliance Certification *  
Completion Date * 

Upload button

9 – Certifications Tab continued

If you have your compliance certificates outside of AHIP, from another qualified Vendor, the separate FWA and AHIP documents need to be uploaded. Using the **BLUE UP ARROWS**, Upload your new 2020 certification, enter a completion date

Please fill out the application below. If you wish to save your progress and complete the application later, click Save and log back in at any time. If you have completed the application, please navigate to the Submit tab and press the blue Submit button. You will be contacted shortly.

Please click the NEXT button at bottom to continue your onboarding process.

- General
- Insurance
- Education
- Certifications
- Submit

Upload all relevant certifications. Items with an * must be completed if not already filled in.

Select the certifications you have *

- AHIP, FWA, Compliance Certification
- OTHER



OTHER *	<input type="text"/>		
Completion Date *	<input type="text"/>		
FWA *	<input type="text"/>		
Completion Date *	<input type="text"/>		
Compliance Certificate *	<input type="text"/>		
Completion Date *	<input type="text"/>		

Upload Buttons



Save

10 – Submit Tab

Once all required Recertification information is entered, go to the last tab called **Submit**

If you see any **RED** incomplete notes on any of the tabs, you must go back and complete before you would be able to hit submit

Please fill out the application below. If you wish to save your progress and complete the application later, click Save and log back in at any time. If you have completed the application, please navigate to the **Submit tab** and press the blue **Submit button**. You will be contacted shortly.

Please click the **NEXT** button at bottom to continue your onboarding process.

General Insurance **Incomplete** Education Certifications **Incomplete** Submit

Submit

Check the attestation box that you did complete all requirements, then click the **BLUE SUBMIT** button

Please click the **NEXT** button at bottom to continue your onboarding process.

General Insurance Banking Information Education Certifications Submit

I certify all information provided is complete and accurate.

Submit

Save

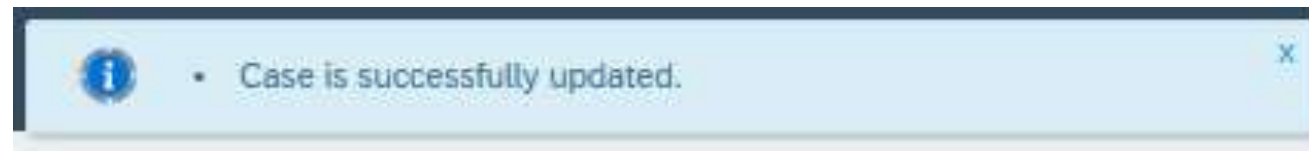
Submit

10 – Submit Tab

If you hit submit and not all requirements were completed you will get a message from the top letting you know case was not submitted and to contact your administrator



You will see a text box open up from the top letting you know it was successfully submitted



11 - Email Notifications

After you have Recertified, you will receive email notification with your login reminder to the ICM system and Broker Portal where you will be able to follow your enrollments and see your commission statements if applicable.

Dear Eleanor Rigby,



You have completed your recertification with EnvisionRxPlus. You are now able to write PDP business for the remainder of 2019 and all of 2020.

Your Producer Number/Writing Code will remain the same and is 001234: You are to continue to use this for the rest of 2019 and the 2020 enrollments.

You have access to the **Broker Callidus Cloud Compensation Portal**, where you currently find the following information:

- Your Commission Statements
- Your Enrollments/Application Status Detail
- Your Personal Demographic data that you entered/verified during Onboarding

Your current user name and password will remain the same.

Login Link: <https://eic.callidusinsurance.net/ICM>

Username: 001234 (current writing number)

Password: Your current word you set up. There is a reset password link if needed.

If you need to reset your password, the password must be at least eight characters long and contain at least one: capital letter, lower case letter, number, and special character.

You will also have access to the **Envision Broker Portal**, where you will enter your enrollments. There you will find the following information:

- Your Enrollments/Application Status Detail

Login link: <https://broker.envisionrxplus.com/>

If you are currently with Envision, there is no need to reregister. However, if you are new to Envision, you must register for access.

***** DO NOT copy and paste your username or password when logging in. This WILL prevent you from logging in successfully *****

Thank you,