



## 2018 Agent Walmart Packet



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# Welcome

Congratulations! You have been selected to sell in the Walmart stores for the 2018 AEP season.

This packet contains vital information regarding the next steps needed to take in order to sell, and be successful while managing your kiosk.

As always, we appreciate your business and are looking forward to a successful AEP.

For questions or concerns, please give us a call at  
1-800-777-9322.

# Store Introduction

Keep in mind that the Walmart Store Manager and Pharmacy Staff are the key to your success. Building a relationship with these staff members will give you a sense of welcome and trust.

Face to face meetings aid the process of great communication when discussing expectations that are specific to their needs, wants and desires. Let the staff be aware of your schedule (i.e. when you are arriving and leaving), so they can direct customers to your area.

Always be persistent, but professional and add value to your communication.

Not showing up on a day you are scheduled, arriving late, or violating any of the guidelines will result in failure of compliance which means no refund, and no guarantee of getting the store next year.

**NOTE: You do not need to present a Letter of Authorization this year.**

# Dress Code, Store Conduct & Compliance

A professional dress code is required. You must wear blue or black to match the program and the Walmart store.

Refrain from wearing or displaying any items branded by a carrier or agency. Keep in mind you do not follow the dress code, it is a compliance violation.

The use of technology for personal reasons is not allowed. Agents are also not allowed to read newspapers, books, or magazines during their shifts.

You will be in charge of the development of your own reporting system and compliance program. Secret Shoppers will visit your booth, to ensure all rules are being followed.

# Important Dates

- ✓ August 15 – HBH Walmart Training Program Training Modules Completed
- ✓ September 1 – Order name tags & buttons completed
- ✓ September 1 – Agents need to be RTS with a minimum of 2 carriers
- ✓ September 1 – Minimum of first two weeks scheduled for all agents
- ✓ September 24 – Scheduling deadline – to be completed in store on October 9
- ✓ October 1 – Agent store meeting complete
- ✓ October 9 – First day in store
- ✓ October 15 – AEP begins

# HBH Retail Program Agent Webinar

Agents are invited and encouraged to attend in an HBH Walmart Retail Program Agent Webinar.

There are two dates to choose from.

Click your time and date below to register.

[Tuesday, August 8, 2017](#)  
[10am - 11am \(EST\)](#)

[Thursday, August 10, 2017](#)  
[3pm - 4pm \(EST\)](#)

# Agent Portal

## Agent Checklist

Complete Training Materials **Not started**

Carrier Certification **No required carriers selected**

Schedule Events **0 Scheduled**

## Store Assignment(s)

Store #:

Store Type:

Store Address:

Store Phone:

Manager:

Pharmacist:

## Notifications

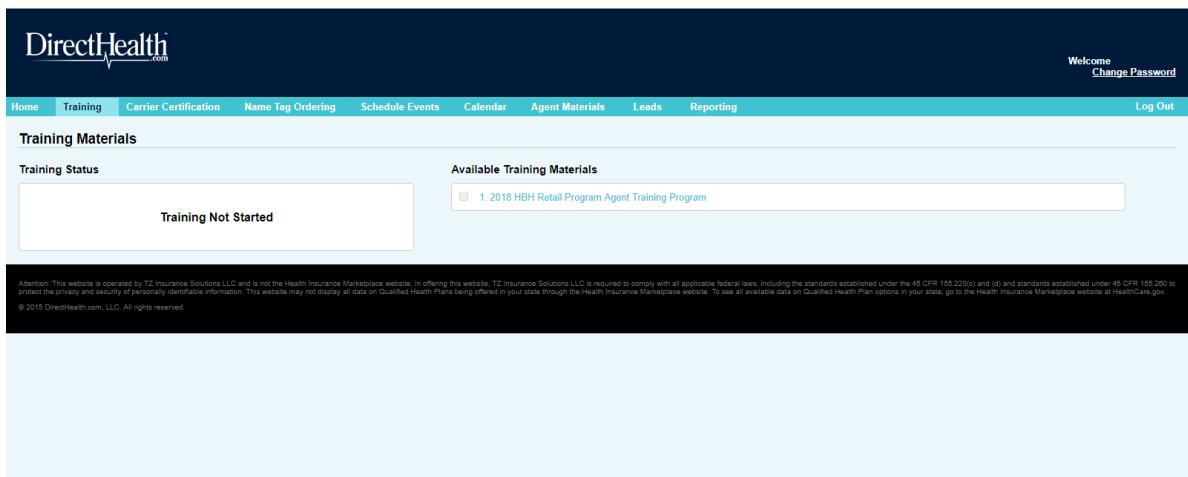
No notifications

The agent portal/home page contains information such as:

- Completed Training Modules
- Carrier Certification Status
- Schedule Events
- Store Assignments
- Notifications

# Agent Program Training

The training for the portal is initiated once your NPN is verified in the portal. You will be guided to BrainShark by an email that may go to spam so if you have issues receiving the email, that is the first place to look. The training must be completed with 80% or higher to move on.



## Sample of BrainShark Email

**From:** [noreplies@brainshark.com](mailto:noreplies@brainshark.com)  
**Date:** August 8, 2016 at 1:34:05 PM EDT  
**To:** **The email you have in the portal**  
**Subject:** Welcome to the Agent Training Portal!  
**Reply-To:** [noreplies@brainshark.com](mailto:noreplies@brainshark.com)



You may now use your user id to enter your Brainshark site and complete your training modules.  
To login, please visit:  
<https://www.brainshark.com/humana/vu?pi=zHZzwNjZNzULa3z0&tx=ASUUs>  
Username: **The email you have in the portal**  
Password: 3XRREJ  
You will be prompted to supply a new password upon login.  
Thank You!



# Carrier Certifications

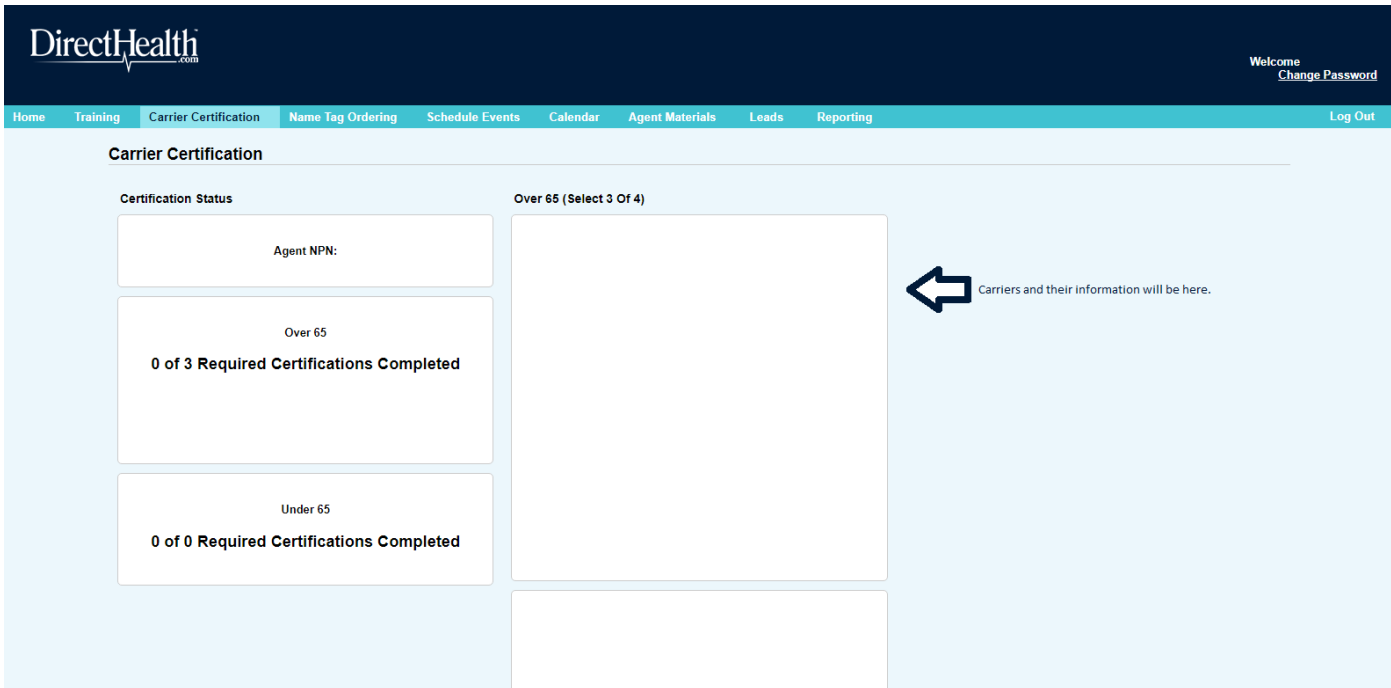
**You MUST be certified with at least 2 Medicare Advantage carriers, and they have to be entered and verified in the portal before September 9.**

For certification instructions, visit our [2018 Carrier Certification Resource page](#).

2018 participating carriers:

Aetna	Allwell	Anthem	Blue California
Blue Cross of Idaho	BlueCross BlueShield of North Carolina	Care 1 <sup>st</sup> Health Plan	CareFirst
CarePlus Health Plans	CVS/Caremark	Freedom Health	Health Alliance
Horizon Blue Cross Blue Shield of New Jersey	Humana	Medico	Mutual of Omaha
Optimum HealthCare, Inc.	SilverScript (PDP)	UnitedHealthcare	

# Carrier Certifications



The screenshot shows the 'Carrier Certification' page in the DirectHealth portal. The page has a dark blue header with the DirectHealth logo on the left and 'Welcome Change Password' on the right. Below the header is a light blue navigation bar with links for Home, Training, Carrier Certification, Name Tag Ordering, Schedule Events, Calendar, Agent Materials, Leads, Reporting, and Log Out. The main content area is titled 'Carrier Certification' and contains several sections:

- Certification Status**: A section with three boxes. The first box is labeled 'Agent NPN:' and is empty. The second box is labeled 'Over 65' and shows '0 of 3 Required Certifications Completed'. The third box is labeled 'Under 65' and shows '0 of 0 Required Certifications Completed'.
- Over 65 (Select 3 Of 4)**: A large empty box intended for listing carriers.
- Instructional Note**: A white box with a left-pointing arrow and the text 'Carriers and their information will be here.'

**You MUST be certified with at least 2 Medicare Advantage carriers, and they have to be entered and verified in the portal before September 9.**

# Name Tag Ordering

## Name Tag Ordering

Please provide the information below so that we may order and ship your name tag.

First Name <input type="text"/>	Last Name <input type="text"/>	
Name as you wish it to appear on your name tag <input type="text"/>		
Best Number to Reach You <input type="text"/>	Preferred Contact Email Address <input type="text"/>	
Street Address <input type="text"/>		
City (required) <input type="text"/>	State <input type="text"/>	Zip <input type="text"/>

Submit Request

Name Tag (Front Side)




Name Tag (Back Side)



# Schedule Events

## Schedule Events

### Available Dates



SEPTEMBER 2017

Sun	Mon	Tue	Wed	Thu	Fri	Sat
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

- Event is confirmed
- Event has been confirmed by at least 1 carrier
- Event has been rejected
- Event has been scheduled but there is no carrier feedback

### Schedule

Selected Store Address:

Select Store:

Select Time Slot:

### Scheduled Events

Assigned Agents	Time Slot
No scheduled events to show.	

**Agents will staff a Kiosk a minimum of 3 days a week with a minimum of 20 hours per store. Additional days and hours are encouraged and failure to appear for a scheduled event is a CMS violation.**

# Marketing Materials

A store schedule template will be provided. Hours of operation will be posted on the kiosk to let the public know ahead of time when you are going to be in the store. You are required to post scheduled store hours every Monday for that week.

**All materials will be shipped to the store or to your provided address. Materials shipped to the store will arrive in care of the pharmacy.**

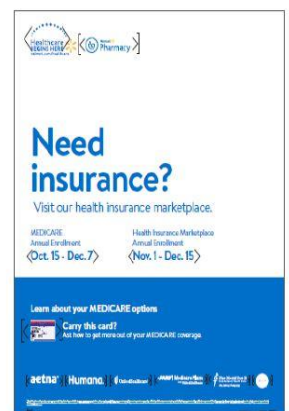


Hours of Operation Sign



Table Poster  
 22 in x 28 in

Table Poster



# Marketing Materials



Brochure



Buttons



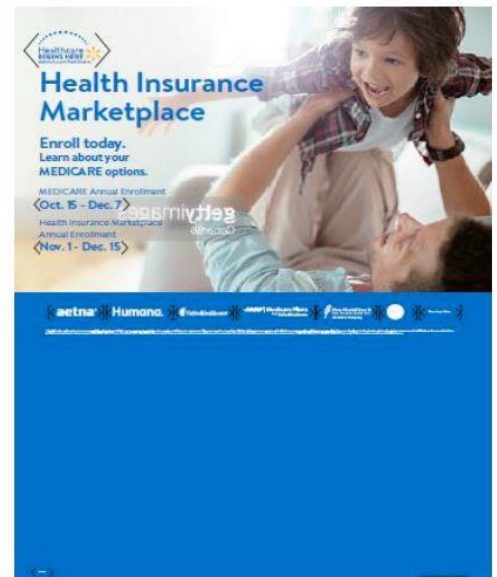
Generic Marketing Tool

## Health Care Begins Here Event

Table Poster

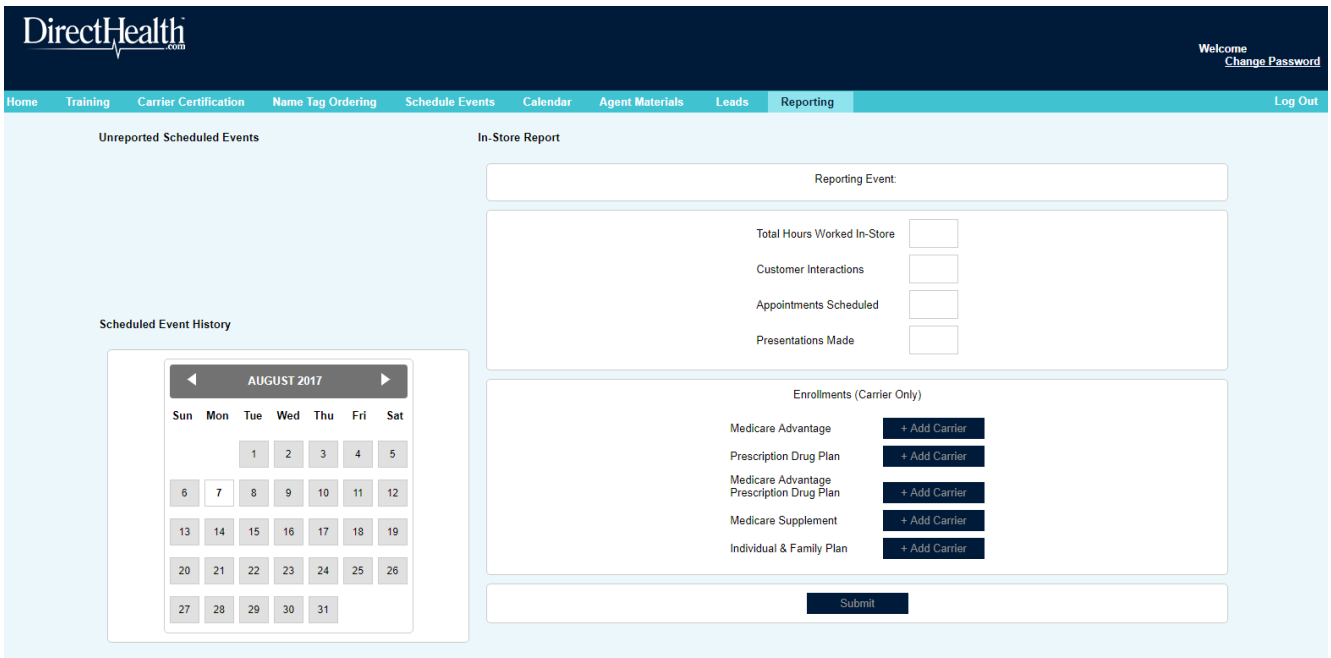


Event Poster



HBH Kiosk Backdrop

# Reporting



The screenshot shows the DirectHealth.com reporting interface. At the top, there is a navigation bar with the following links: Home, Training, Carrier Certification, Name Tag Ordering, Schedule Events, Calendar, Agent Materials, Leads, Reporting (highlighted), and Log Out. The main content area is divided into several sections:

- Unreported Scheduled Events:** A section for tracking events that have not yet been reported.
- Scheduled Event History:** A calendar view for August 2017, showing days from Sunday to Saturday. The 7th of August is highlighted.
- In-Store Report:** A form for reporting daily activities. It includes a "Reporting Event:" field, and four input fields for:
  - Total Hours Worked In-Store
  - Customer Interactions
  - Appointments Scheduled
  - Presentations Made
- Enrollments (Carrier Only):** A list of enrollment types with corresponding "+ Add Carrier" buttons:
  - Medicare Advantage
  - Prescription Drug Plan
  - Medicare Advantage Prescription Drug Plan
  - Medicare Supplement
  - Individual & Family Plan
- Submit:** A button at the bottom of the In-Store Report form.

The reporting tab is where you must report your activity daily, and complete the program through December 7<sup>th</sup> to qualify.

**NOTE: You must report your activities to obtain a store refund. Be sure to fill out all entry fields.**

# Program Reminders

- ✓ Agents will staff a Kiosk a minimum of 3 days a week with a minimum of 20 hours per store
- ✓ Additional days and hours are encouraged
- ✓ Failure to appear for a scheduled event is a CMS violation
- ✓ Be sure your portal work is complete
- ✓ Complete required HBH training
- ✓ Complete carrier certifications
- ✓ Be professional, accountable and organized
- ✓ There is no Health Fair event this year