



# Agent User Guide

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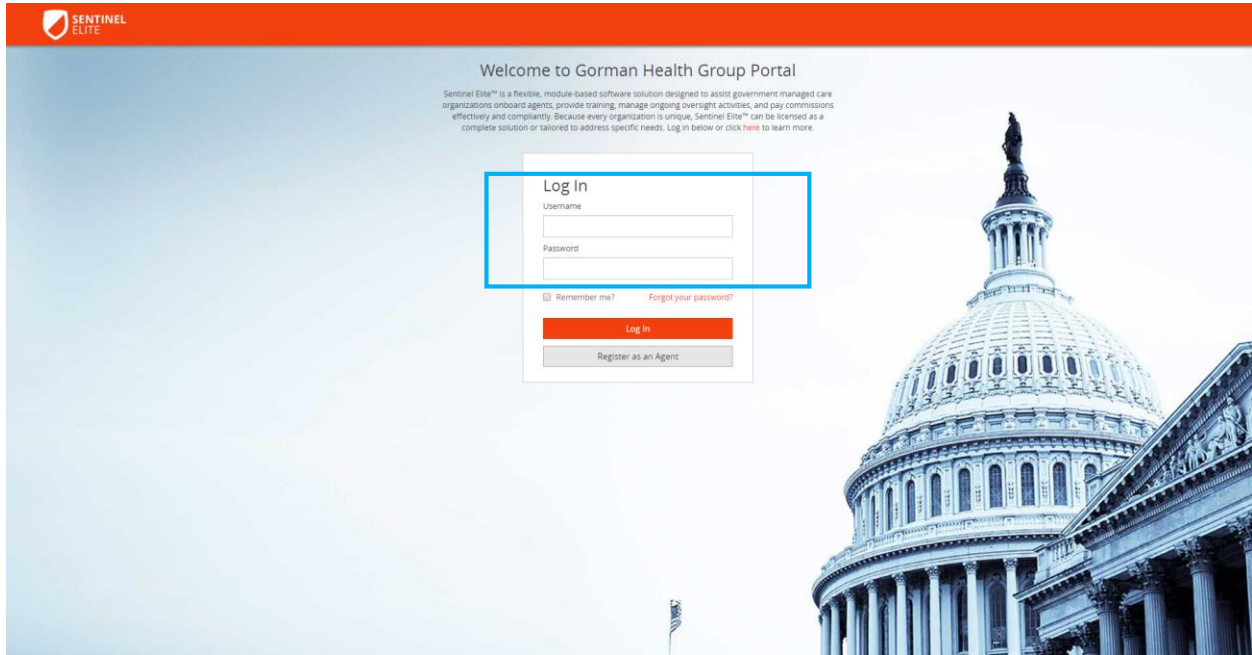
**SENTINEL ELITE™**

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## General

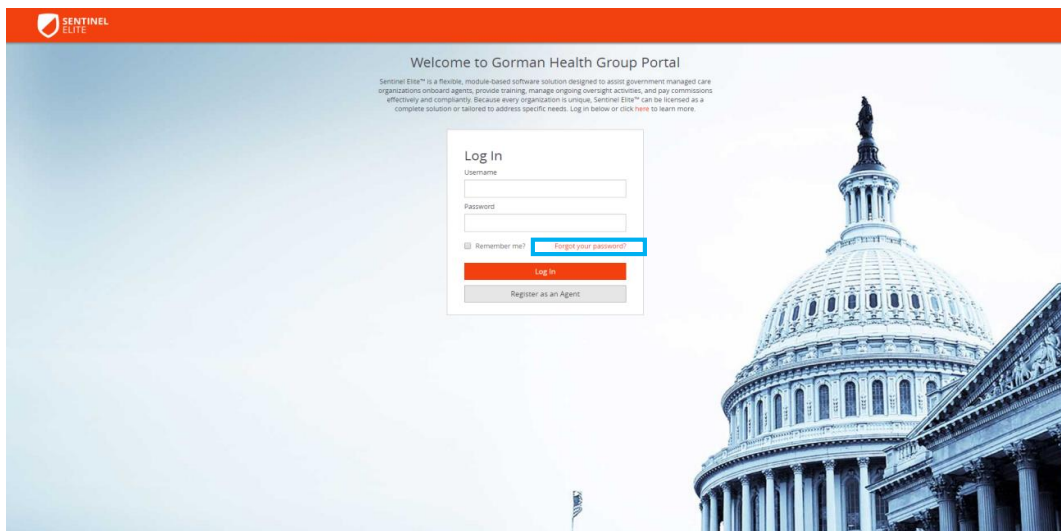
### LOGGING IN

Sentinel Elite™ is accessible at [www.sentinelelite.com](http://www.sentinelelite.com). To login enter your username and password and then click **Log In**.



### PASSWORD RESET

If you have forgotten your password click **Forgot your password?** on the landing page.



Enter your User Name when prompted and click **Continue**.

SENTINEL ELITE

### Forgot Password

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.

ACCOUNT INFORMATION

User Name\*

Continue

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

Contact:  
info@gorman.com  
125-456-7890

Next confirm the answer to your self-selected **Security Question** along with the **Last Four Digits of your Social Security Number** and click **Continue**.

SENTINEL ELITE

### 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

In which city would you like to retire?

Last four digits of SSN\*

Continue

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

Contact:  
info@gorman.com  
125-456-7890

Enter a new password and confirm by reentering.

- Tip: Password requirements in Sentinel Elite™ include at least 8 characters, including at least one uppercase letter, a lower case letter, a number and a non-alphanumeric character (#\$!). Example: Password1#

SENTINEL ELITE

### Forgot Password

Step 3 of 3 - Please enter and confirm a new password for your account.

RESET PASSWORD

Password\*

Confirm password\*

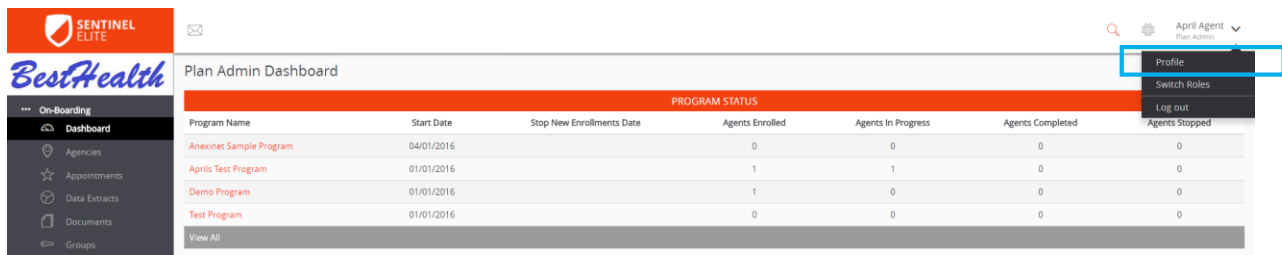
Reset Password

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

Contact:  
info@gorman.com  
125-456-7890

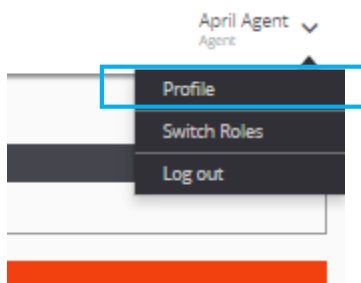
## PROFILE MANAGEMENT

To manage your profile including your demographic information and security details, place the cursor on your name in the upper right hand corner of the screen and select **Profile** from the drop down menu.



The screenshot shows the Best Health Plan Admin Dashboard. In the top right corner, the user's name "April Agent" is displayed with a dropdown arrow. A dropdown menu is open, showing options: "Profile", "Switch Roles", and "Log out". The "Profile" option is highlighted with a blue box. Below the dashboard header, there is a table titled "PROGRAM STATUS" with columns for Program Name, Start Date, Stop New Enrollments Date, Agents Enrolled, Agents In Progress, Agents Completed, and Agents Stopped. The table contains four rows of data.

Program Name	Start Date	Stop New Enrollments Date	Agents Enrolled	Agents In Progress	Agents Completed	Agents Stopped
Anexinet Sample Program	04/01/2016		0	0	0	0
April Test Program	01/01/2016		1	1	0	0
Demo Program	01/01/2016		1	0	0	0
Test Program	01/01/2016		0	0	0	0



This is a close-up of the user profile dropdown menu. The user's name "April Agent" is shown above the menu. The menu items are "Profile", "Switch Roles", and "Log out". The "Profile" option is highlighted with a blue box.

The information housed on your Profile Screen includes;

### Demographic Information

- Name
- Date of Birth
- Gender
- Social Security Number
- National Producer Number
- Email
- Telephone Numbers
- Addresses

### Credentials

- Username
- Password
- Security Questions
- Security Answers

### Principal Details (where applicable)

- Name of Agency for which you are the Principal

You may update the information contained on your **My Profile** screen. Once updated, click Save, to cancel click Cancel.

Tip: Required fields are identified with an asterisk throughout Sentinel Elite™.

Tip: For security purposes your Social Security Number may not be used as your Username.

If you are the **Principal of an agency** you must register as an individual before you will be allowed to register as the Principal of an agency. Once your individual profile is set up, proceed to the Profile screen and click **Principal for an agency?** on the right of the screen below Login Credentials.

My Profile

DEMOGRAPHIC INFORMATION

First Name\* [April] Initial [A] Last Name\* [Agent] Suffix [ ]

State of Birth\* [1111-1111] Gender\* [ ] [ ] [ ] [ ]

Social Security Number\* [123-45-6789] National Producer Number [123456789] NPN Lookup

Email\* [am@pmrhealthgroup.com]

Primary Phone Number\* [206-206-6943] Phone Number Type\* [Home]

Additional Phone Number 1 [222-222-2222] Phone Number Type [Tax]

Additional Phone Number 2 [666-666-6666] Phone Number Type [Mobile]

PRIMARY ADDRESS

Address Line 1\* [123 street] Address Line 2 [suite 6]

City\* [Long Beach] State\* [California] Zip\* [90815]

MAILING ADDRESS

Same as primary address

Address Line 1 [666 street] Address Line 2 [po mailbox]

City [wilmington] State [California] Zip [90815]

LOGIN CREDENTIALS

Username\* [ ]

Password\* [ ]

Confirm Password [ ]

Security Question\* [ ]

Security Question Answer\* [ ]

Principal for an agency?

Cancel Save

You will be prompted to input the **Tax ID (FEIN)** and **National Producer Number** for the agency.

To continue registering as the Principal of an agency click **Register**. To cancel, click Cancel.

REGISTER AS AGENCY PRINCIPAL

Please enter the Tax ID and NPN for the agency for which you are a principal.

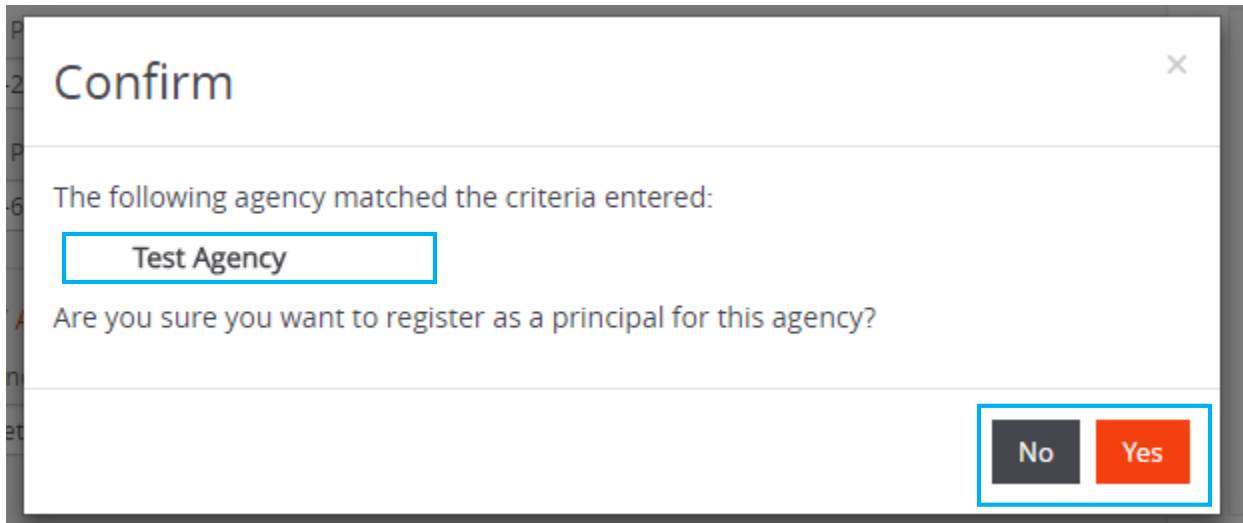
Tax ID\*

National Producer Number\*

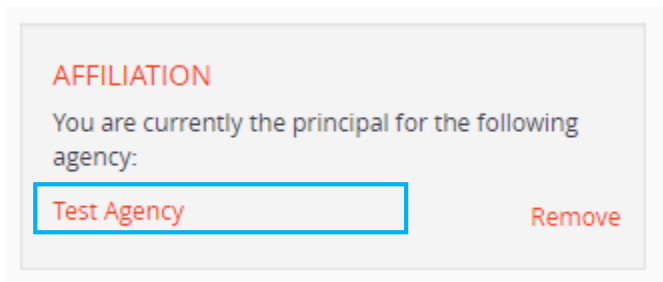
Cancel Register

You will then be prompted to confirm that you'd like to register as the **Principal of the agency**.

To complete your registration as the Principal of an agency verify the name of the agency in the box and click **Yes**. To cancel, click **No**.



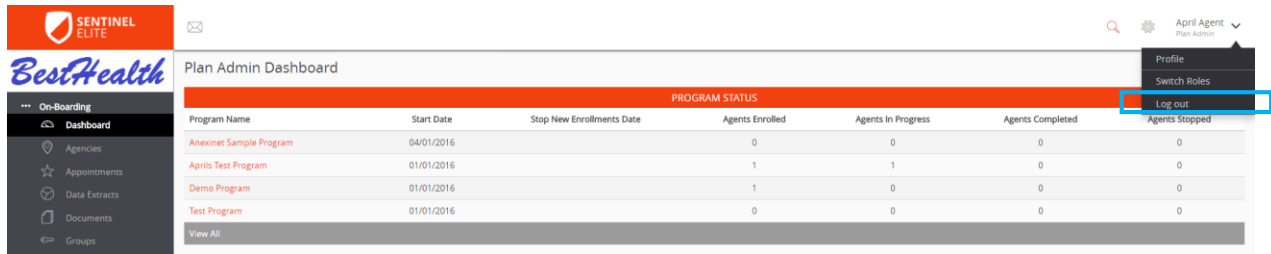
Once you have completed your registration as the Principal of an agency Sentinel Elite™ will display the affiliation below your **Login Credentials** on the **My Profile** screen.





## LOGGING OUT

To log out, place the cursor on your name in the upper right hand corner of the screen and click the down arrow to the right. Select **Log out** from the drop down menu.



The screenshot shows the Plan Admin Dashboard interface. In the top right corner, the user's name 'April Agent' is displayed with a dropdown arrow. The dropdown menu is open, showing options: 'Profile', 'Switch Roles', and 'Log out'. The 'Log out' option is highlighted with a blue box. Below the header, there is a table titled 'PROGRAM STATUS' with columns for Program Name, Start Date, Stop New Enrollments Date, Agents Enrolled, Agents In Progress, Agents Completed, and Agents Stopped. The table contains four rows of data for different programs.

Program Name	Start Date	Stop New Enrollments Date	Agents Enrolled	Agents In Progress	Agents Completed	Agents Stopped
Anexnet Sample Program	04/01/2016		0	0	0	0
Aprilis Test Program	01/01/2016		1	1	0	0
Demo Program	01/01/2016		1	0	0	0
Test Program	01/01/2016		0	0	0	0

# AGENT DASHBOARD

The Agent Admin Dashboard is the hub of Sentinel Elite™ and thus the landing page. The Dashboard provides a snapshot of your activity in several categories for all Plans you work with that utilize Sentinel Elite™. You will see your Program Status, Groups, Ready to Sell status, applicable Appointments, Licenses, and New Messages. You will also be able to access your Documents, including certificates of completion for courses you have successfully completed.

The screenshot displays the Sentinel Elite Agent Dashboard with a sidebar menu on the left containing: Dashboard, Appointments, Documents, Groups, Licenses, Messages, Programs, and Ready to Sell. The main content area is titled "Agent Dashboard" and features several data sections:

- PROGRAMS:** A table with columns for "In Progress", "None", "Completed", and "Region". It lists programs such as "Annapolis/Annapolis", "Test BCBS of Indiana 2", "BCBS Annapolis 3", and "Test Michigan 2".
- GROUPS:** A table with columns for "Plan", "Group", "Start Date", and "Writing Code". It lists groups like "Best Health Plan, Inc", "APRIC Test Group", "BCBS Michigan", "CIR VENDOR", and "Annapolis BCBS".
- READY TO SELL:** A table with columns for "Plan", "Contract Name", "Contract #", "State", "Benefit Year", and "Effective". It shows a row for "No Results".
- LICENSES:** A table with columns for "License #", "State", "Line of Authority", "License Class", "Status", "Effective Date", and "Expiration Date". It lists a license for "CO" with "Life & Health" authority.
- NEW MESSAGES:** A section indicating "You do not have any unread messages".
- APPOINTMENTS:** A section with "Active" and "Pending" tabs, indicating "There are no active appointments".

## APPOINTMENTS

To manage your **Appointments**, you may either, click the **Appointments** icon in the Menu to the left of the screen or go to the **Appointments** section located on the Agent Dashboard in the upper right of the screen. The **Appointments** section in the Agent Dashboard will provide a snapshot of your appointments. Your **Appointment** information is refreshed on a daily basis. To see all of your appointments click **View All** in the gray bar below the displayed appointments.

The screenshot shows the Sentinel Elite Agent Dashboard. The 'Appointments' section is highlighted with a blue box. It contains a table with columns for 'Appointments' and 'Pending'. Below the table, there is a 'View All' link. The dashboard also displays sections for 'PROGRAMS', 'READY TO SELL', and 'LICENSES'.

Once on the **Appointment** screen you may search by your appointment **Status (Appointed, Exception, Failed, Pending, Record Not Found, Submitted to State, or Terminated)**.

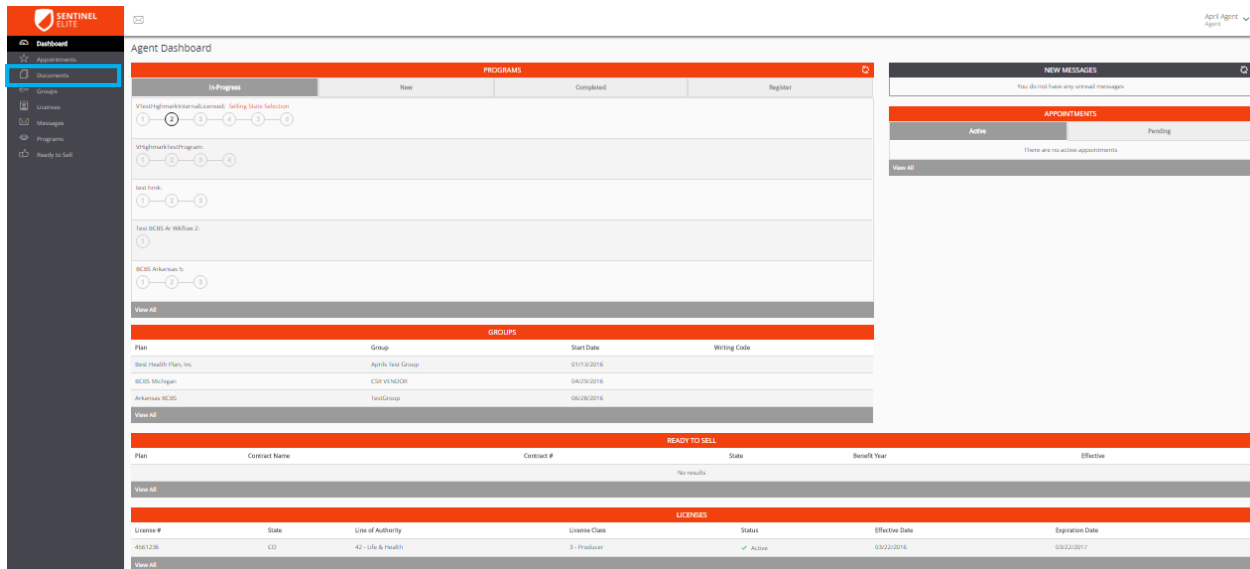
You may also filter by Appointing Entity, Start Date, Plan, State, End Date, or Status.

The screenshot shows the Sentinel Elite Appointments screen. The 'Status' filter is highlighted with a blue box. The screen displays a table with columns for 'Appointing Entity', 'Start Date', 'Plan', 'State', 'End Date', and 'Status'. The table currently shows 'No Results'.

# DOCUMENT MANAGEMENT

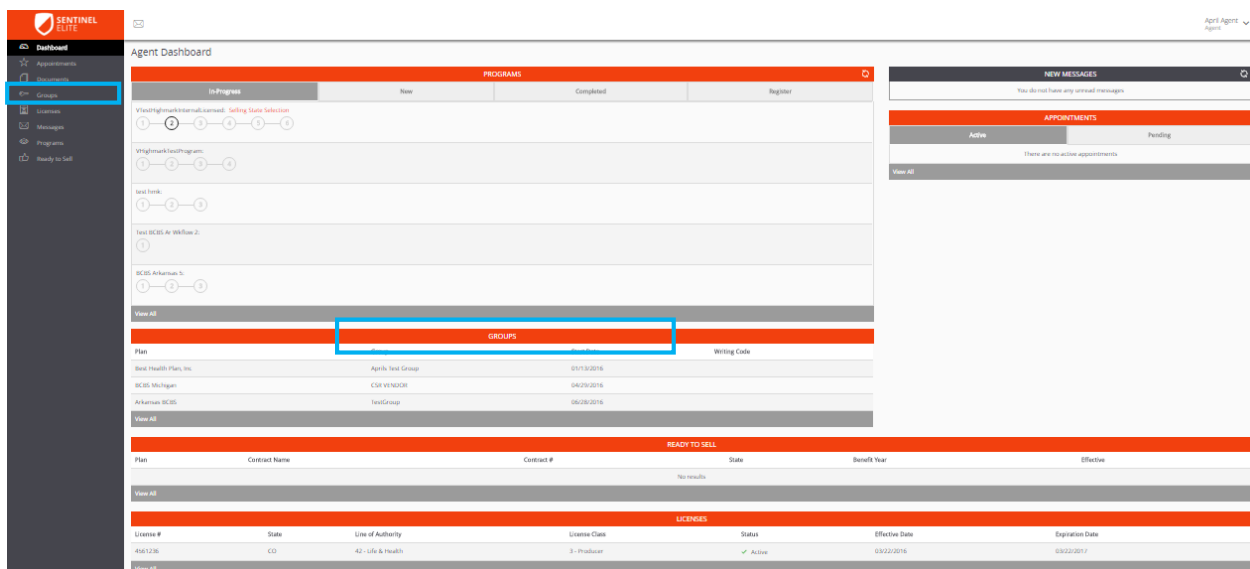
## Document Storage

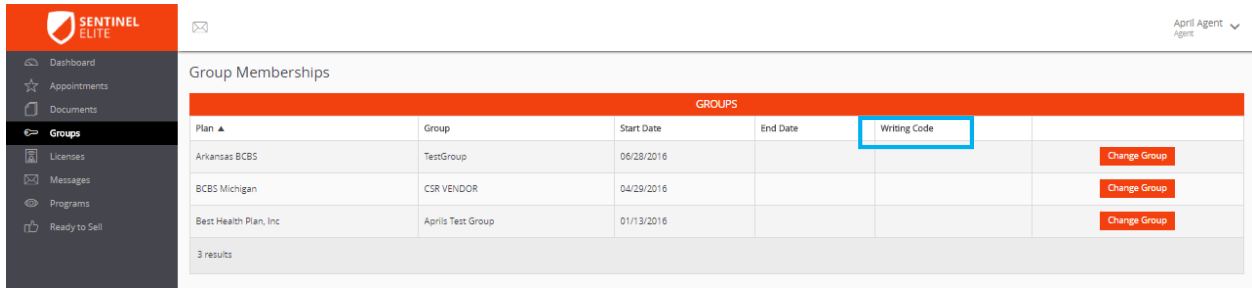
To manage your stored documents, click the **Documents** icon in the **On-Boarding** Menu to the left of the screen. You will be able to view any documents that have been loaded to Sentinel Elite™ either independently or through a program including certificates of completion for training courses you have successfully completed.



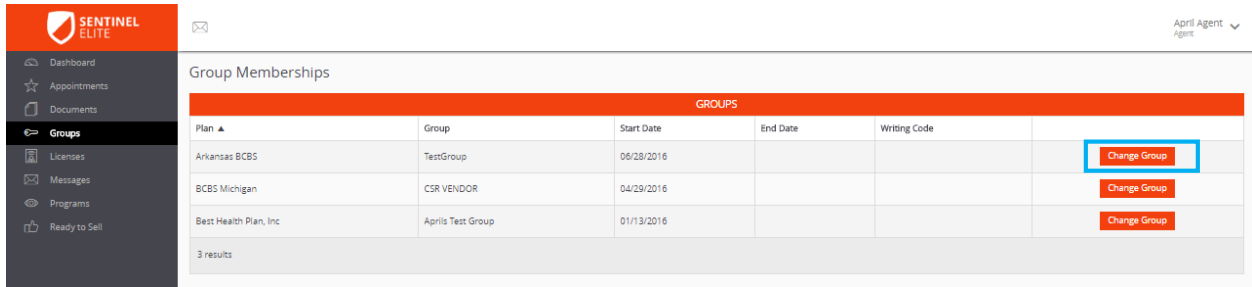
# GROUP MANAGEMENT

To view your **Groups**, you may either, click the **Groups** icon in the menu to the left of the screen or go to the **Groups** section located in the center of the Agent Dashboard. The **Groups** section in your Agent Dashboard will provide a snapshot of your groups. To see all of your groups click **View All** in the gray bar below the displayed groups.






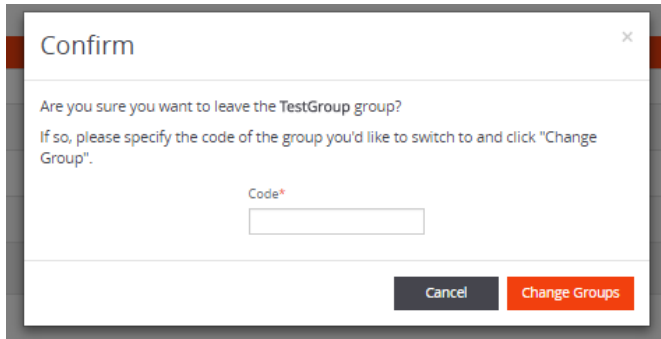
The **Group Membership** screen is where you will find your **Writing Code** (when assigned via Sentinel Elite™). You will be able to view your Plans and affiliated group along with associated **Writing Code or Agent ID**.



The **Group Memberships** screen is also where you'd request a change in Group\*. To request a change in group for a specific Plan you must first have the Group PIN Code for the group you would like to move to.

 **Tip:** You may only be affiliated with one Group at a time per Plan.

To request a change in Group, click **Change Group** to the right of the Group information on the **Group Memberships** screen.



You will then be prompted to enter the Group PIN Code for the group you would like to move to.

Once you have submitted this information, a message will automatically be sent to your Plan indicating that you would like to change groups. The Plan may approve or deny this request. They may also require additional information be completed to process your request. You will be notified of the Plans decision.

\* Group changes may not be available for all Plans.

## LICENSES

To view your **Licenses**, you may either, click the **Licenses** icon in the menu to the left of the screen or go to the **Licenses** section located at the bottom of the Agent Dashboard. The **Licenses** section in the Agent Dashboard will provide a snapshot of your licenses. To see all of your licenses click **View All** in the gray bar below the displayed licenses.

The screenshot displays the Sentinel Elite Agent Dashboard. The left sidebar contains a menu with 'Licenses' highlighted in blue. The main content area is titled 'Agent Dashboard' and features several sections: 'PROGRAMS' (In Progress, New, Completed, Register), 'GROUPS' (Plan, Group, Start Date, Writing Code), 'READY TO SELL' (Plan, Contract Name, Contract #, State, Branch Year, Effective), and 'LICENSES' (License #, State, Line of Authority, License Class, Status, Effective Date, Expiration Date). The 'LICENSES' section is highlighted with a blue box. Below the main dashboard, a separate 'LICENSES' table is shown, containing the following data:

License #	State	Line of Authority	License Class	Status	Effective Date	Expiration Date
43811258	CO	42 - Life & Health	3 - Producer	Active	03/22/2016	03/22/2017

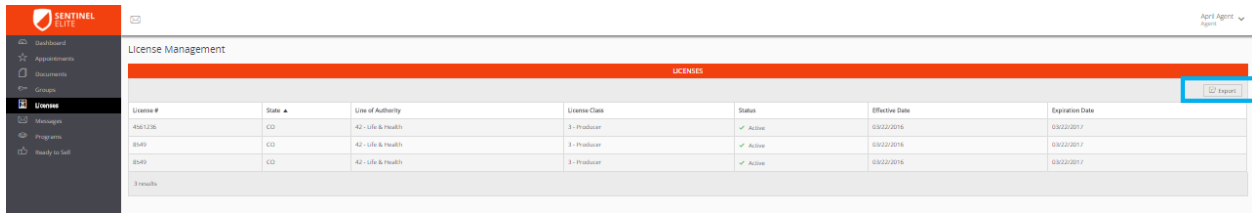
Your license information is refreshed on a daily basis.

You may utilize Sentinel Elite™ to monitor your licenses and track licenses with upcoming expiration dates.

When your license expiration date is highlighted in yellow it indicates that your license will be **expiring within the next 30 days**.

While on the **License Management** screen, any licenses that have already **expired will be highlighted in red**.

You will be able to export a list of your licenses. To do so, click **Export** in the top right corner of the **License Management** screen

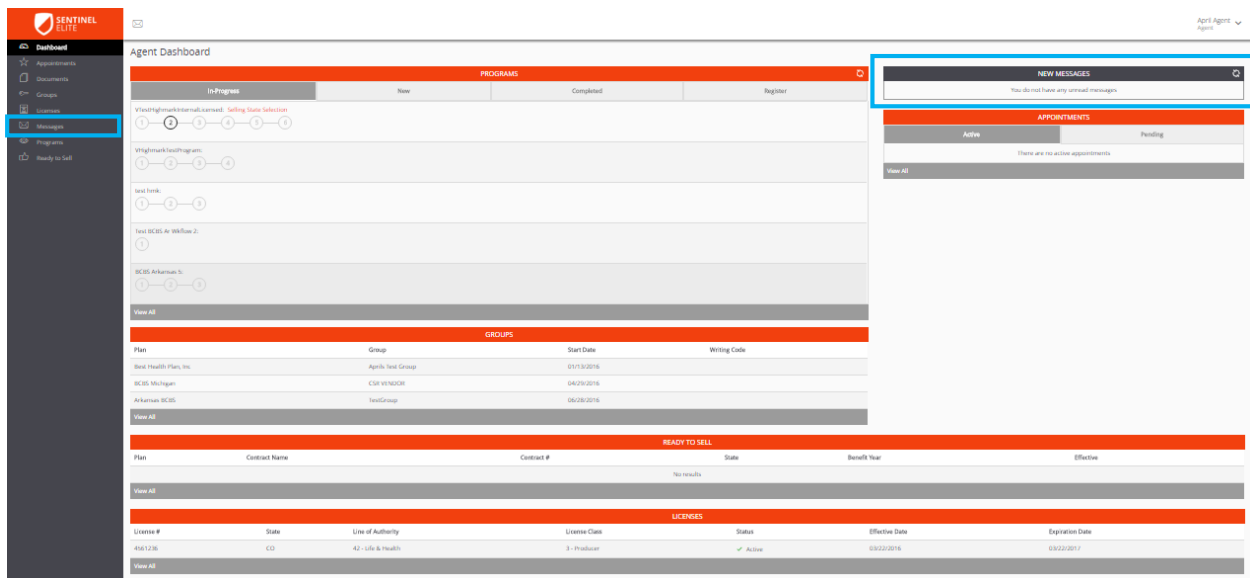


This will produce an excel spreadsheet for your use.

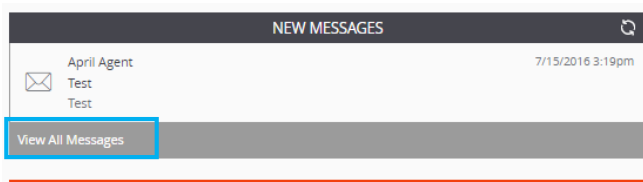
	A	B	C	D	E	F	G	H	
1	License ID	License Number	State	LOA Code	License Class Code	Status	Effective Date	Expiration Date	
2	4	4561236	CO	42 - Life & Health	3 - Producer	Active	3/22/2016	3/22/2017	
3	5	8549	CO	42 - Life & Health	3 - Producer	Active	3/22/2016	3/22/2017	
4	6	8549	CO	42 - Life & Health	3 - Producer	Active	3/22/2016	3/22/2017	
5									

## MESSAGING CENTER

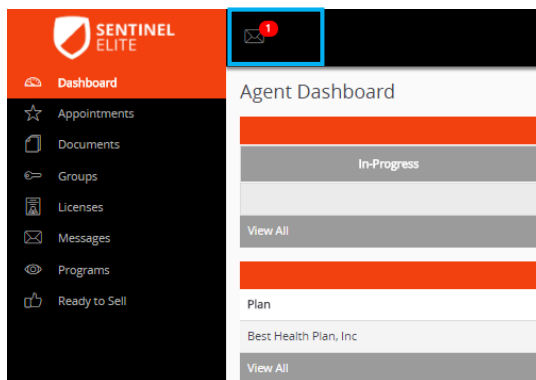
The Messaging Center will be activated when you receive a message. To manage your **Messages**, you may either, click the **Messages** icon in the Menu to the left of the screen or go to the **New Messages** section located at the top right of the Agent Dashboard.



The **New Messages** section in the Agent Dashboard will provide a snapshot of your messages. To see all of your messages, click **View All Messages** in the gray bar below the displayed messages.



The new messages indicator in the top left of the Agent Dashboard will display how many new messages you have.






Once on your **Messages** screen you will be able to see both new messages and sent messages.



To reply to a message, compose your reply and click **Reply**.

 **Note:** You may not be able to reply to all messages, as some are sent as informational only and do not allow a reply.



## PROGRAMS

To manage your **Programs** go to the **Programs** section located at the top of the Agent Dashboard.

While viewing your programs on the Agent Dashboard, you may scroll over the timeline to see what each step consists of e.g. Welcome, License Check, and Product Training.

Some steps may require action and others may automatically process as you work through a program.

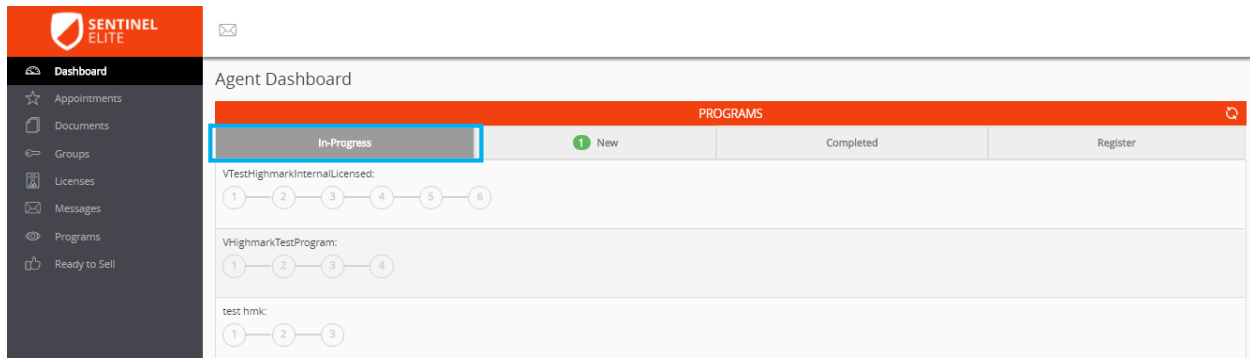
The screenshot displays the Sentinel Elite Agent Dashboard. The 'PROGRAMS' section is highlighted with a blue box. It shows a 'New' button and a 'Completed' button. Below this, there are two 'In-Progress' sections. The first is for 'Highmark HealthProgram' with a timeline showing steps 1 through 4. The second is for 'SCBS Arkansas 5' with a timeline showing steps 1 through 2. Below these are sections for 'GROUPS', 'READY TO SELL', and 'LICENSES'. The 'GROUPS' section has a table with columns: Plan, Group, Start Date, and Writing Code. The 'READY TO SELL' section has a table with columns: Plan, Contract Name, Contract #, State, Benefit Year, and Effective. The 'LICENSES' section has a table with columns: License #, State, Line of Authority, License Class, Status, Effective Date, and Expiration Date.

Plan	Group	Start Date	Writing Code
Best Health Plan, Inc	Aprio Test Group	01/13/2016	
SCBS Michigan	CSR VENDOR	04/29/2016	
Arkansas SCBS	TestGroup	06/28/2016	

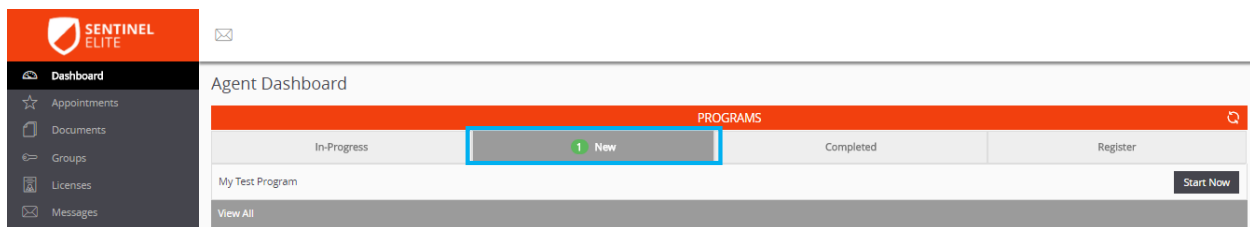
Plan	Contract Name	Contract #	State	Benefit Year	Effective
			No results		

License #	State	Line of Authority	License Class	Status	Effective Date	Expiration Date
RA1236	CO	42 - Life & Health	3 - Producer	Active	03/22/2016	03/22/2017

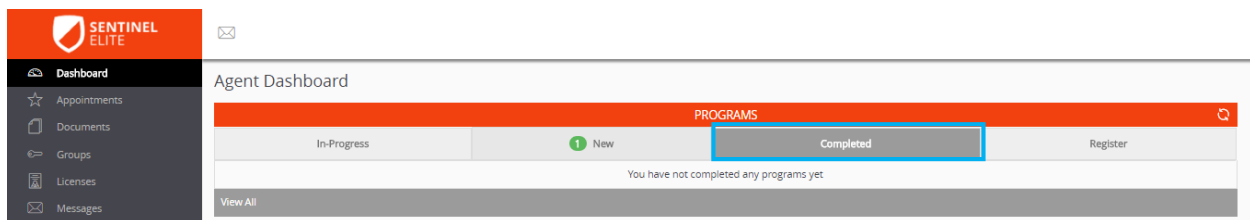
Programs you have started will appear in the **In-Progress** section.



Programs that you have recently been enrolled in will appear in the **New** section and will include an indicator identifying how many new programs you have been enrolled in. Enrollment for this area occurs at the Plan level and does not require the entry of a Registration Code.

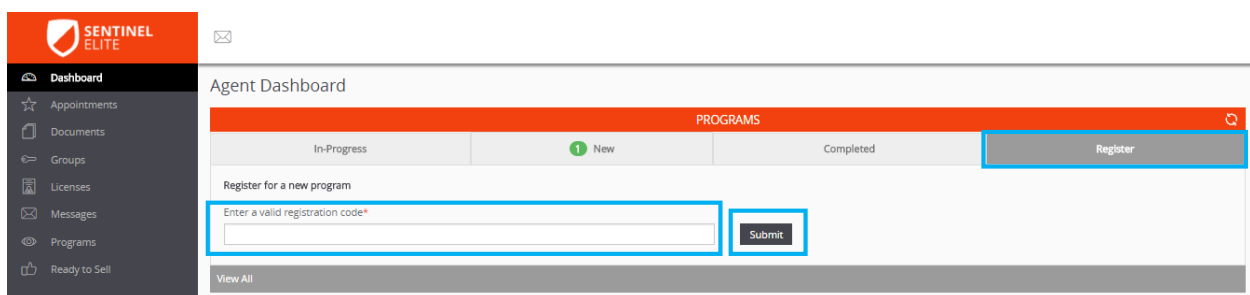


Programs you have already completed will appear in the **Completed** section.



To **Register** for a program for which you have the **Registration Code**, click **Register** in the **Programs** section on the Agent Dashboard.

Enter your **Registration Code** and click **Submit**.



To view all **Programs**, you may either, click the **Programs** icon in the Menu to the left of the screen or go to the **Programs** section located at the top of the Agent Dashboard and click **View All** in the gray bar below the displayed programs.

The screenshot shows the 'Program Enrollments' screen in the Sentinel One Agent Dashboard. The interface features a sidebar menu on the left with 'Programs' selected. The main content area displays a table of program enrollments. At the top of the table, there is a search bar with a dropdown menu for 'Status'. The table has the following columns: Program, Enrollment Date, Start Date, Completed Date, Status, Task(s), and Steps Completed. The data rows include various programs such as '2017 Arkansas RCES Agent Onboarding and Training Program', 'Agents Test Program', 'RCES Arkansas 5', 'Demo Program', 'Example', 'Gringo Master Workflow', 'Gringo Test Program', 'My Test Program', 'Sudo 999', and 'Test RCES'. The status for most programs is 'In Progress', while one is 'Error Failure' and another is 'Step 1'. The bottom of the table shows '20 results' and a pagination control for '1 of 2'.

Program	Enrollment Date	Start Date	Completed Date	Status	Task(s)	Steps Completed
2017 Arkansas RCES Agent Onboarding and Training Program	06/28/2016	06/28/2016		In Progress	RCES Arkansas Welcome Form	-
Agents Test Program	05/19/2016	05/19/2016	05/01/2000	Error Failure		2 of 7
RCES Arkansas 5	06/30/2016	06/30/2016		In Progress		-
Demo Program	05/19/2016	06/22/2016		In Progress		-
Example	06/16/2016	06/16/2016		In Progress		-
Gringo Master Workflow	06/16/2016	06/16/2016		In Progress		-
Gringo Test Program	06/16/2016	06/16/2016		In Progress		-
My Test Program	06/16/2016	06/16/2016		In Progress	Step 1	-
Sudo 999	06/16/2016	06/16/2016		In Progress		-
Test RCES	06/28/2016	06/28/2016		In Progress		-

Once on the **Program Enrollments** screen, you will be able to search by **Status** (Completed, Error Failure, In Progress, Not Started, Stopped, Terminated, and Waiting for Condition).

You may also filter by Program Name, Enrollment Date, Start Date, Completed Date, Status, Tasks remaining, and Steps Completed.

## READY TO SELL MANAGEMENT

To view the contracts for which you are **Ready to Sell**, you may either, click the **Ready to Sell** icon in the Menu to the left of the screen or go to the **Ready to Sell** section located toward the bottom of the Agent Dashboard. The **Ready to Sell** section in the Agent Dashboard will provide a snapshot of the contracts for which you are ready to sell. To see all of the contracts for which you are ready to sell click **View All** in the gray bar below the displayed ready to sell contracts.

The screenshot shows the Sentinel Elite Agent Dashboard. The 'Ready to Sell' section is highlighted in the sidebar. The main content area displays a table for 'READY TO SELL' with columns: Plan, Contract Name, Contract #, State, Benefit Year, and Effective. The 'Effective' column is highlighted with a blue box. Below the table is a 'View All' link.

The exact date you are eligible to sell under a specific contract will be displayed on the Ready to Sell screen under **Effective**.

This close-up shows the 'READY TO SELL' table header and the first row. The 'Effective' column is highlighted with a blue box. The table has columns: Plan, Contract Name, Contract #, State, Benefit Year, and Effective. The first row shows 'No results' in the Effective column.

Once on the **Ready to Sell** screen you will be able to manage all of the contracts for which you are able to sell. You will be able to search by **Contract Name** or **Benefit Year**.

You may also filter by ID, Contract, Benefit Year, LOB (Line of Business), Effective Date, or State.

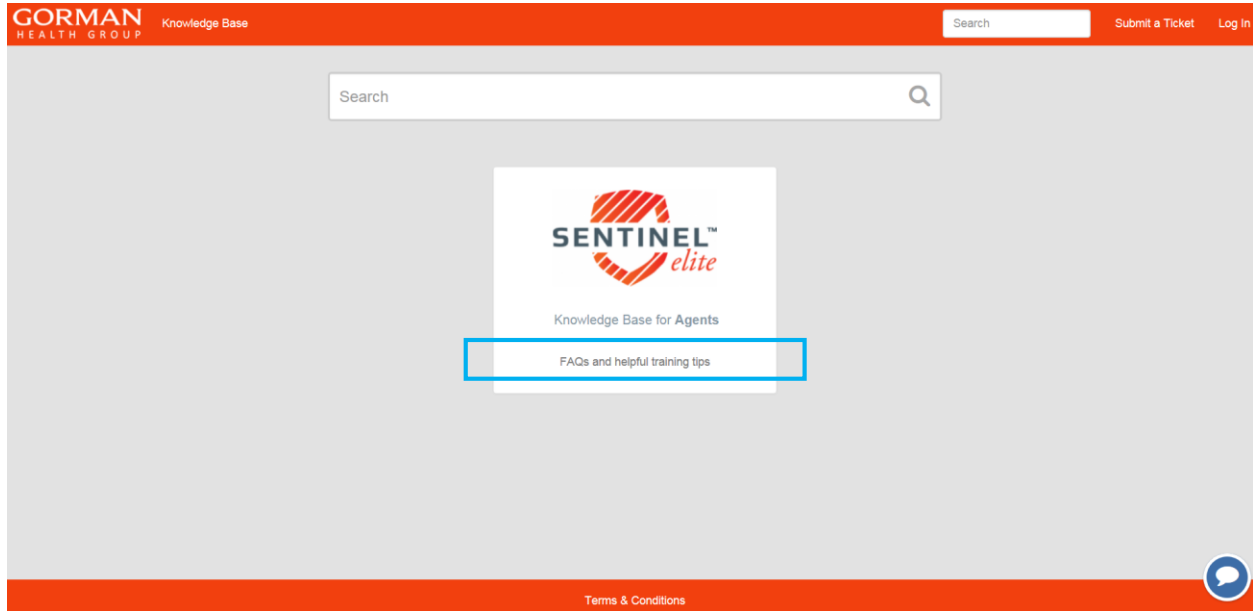
To **Export** a list of the Contracts for which you are ready to sell, click **Export** in the top right corner of the **Ready to Sell** screen. This will produce an Excel spreadsheet of the contracts for which you are ready to sell.

The screenshot shows the 'Ready to Sell' screen. The 'Export' button is highlighted with a blue box. The screen includes a search bar with 'Contract' and 'Benefit Year' fields, and a table with columns: ID, Contract, Benefit Year, LOB, EffectiveDate, and State. The table shows '0 results'.

# HELP

## AGENT HELP PORTAL

The agent Help Portal or **Knowledge Base** can be accessed at <https://ghg.na2.teamsupport.com/knowledgeBase>.



The **Knowledge Base** will provide answers to many frequently asked questions, such as How do I reset my password?

