



Agent Portal Enhancement Training

08/2023

Our Mission

Move people to do things
that are good for them.



Agenda

Introductions
Enhancement Overview
Timeline & Agent
Messaging
Training Materials
Live Demo
Q&A

Enhancement Overview

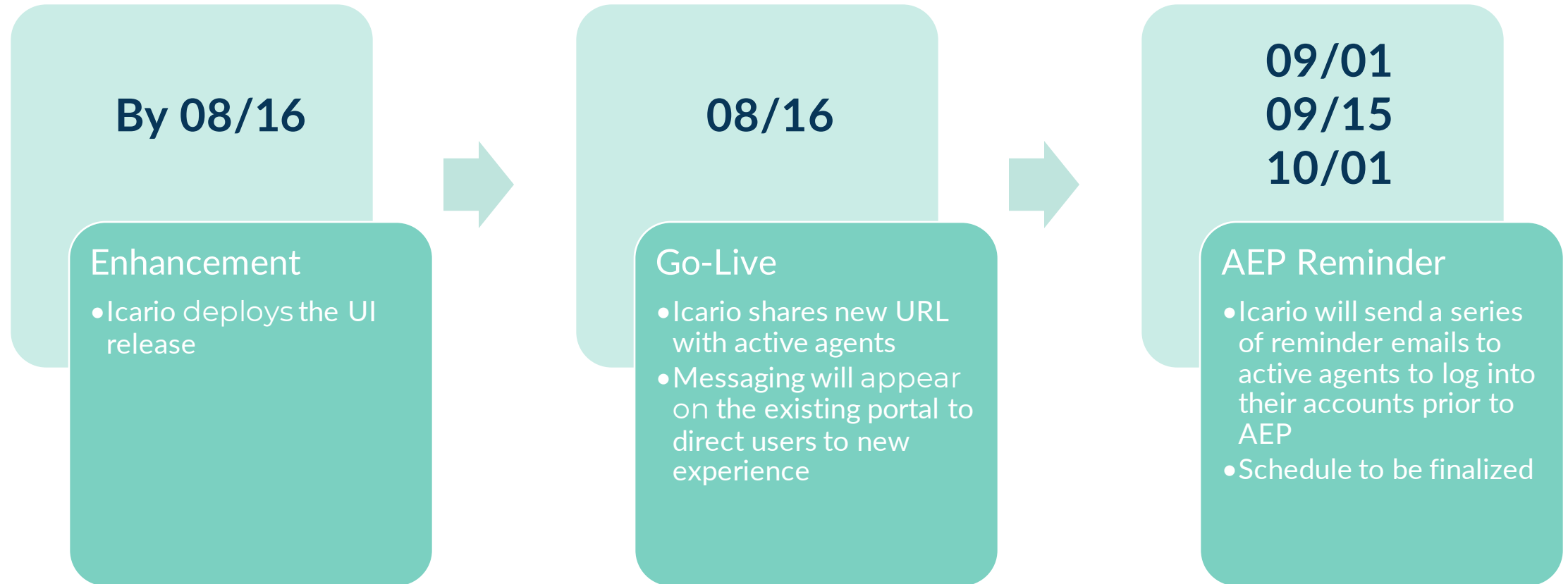
What is the Agent Portal?

The Agent Portal is a user-friendly tool within the Icario platform designed for efficiency. Sales Agents and Brokers can quickly capture assessments as part of a seamless sign-up process for *new* plan enrollees.

How is the Portal Changing?

- Rebranded to match the new Icario logo, color scheme, etc.
- Updated the navigation menu to be more intuitive
- Simplified the search fields within the applicant page
- New responsive compatibility (mobile, tablet, laptop)
- Added additional error messages and guidance to the add applicant page
- New capability to text Welcome Emails & Forgot Password messages to agents*

Timeline & Agent Messaging



Training Materials

The below materials will be shared post-meeting, which can be cascaded to your brokers and agents.

- Training PDF deck
- Recorded demo link

The below resources will be shared post-meeting to reference internally.

- Recorded training session
- This PDF deck

Live Demo

Q&A

Thank You

Standard Icario Agent Listing File Specification

Email	Mobile Phone	Last Name	First Name	Role	External Identifier	Add or Remove Access	Date Submitted to Icario	List Company Profile:
<i>Unique email for agent, agent will use this email to login to Amplify</i>	<i>Agent mobile phone to be used for onboarding and forgot password reset</i>	<i>Agent last name</i>	<i>Agent first name</i>	<i>this role will always be 'Agent'</i>	<i>Agent SAN *alpha-numeric</i>	<i>Is this agent being added or removed?</i>	<i>Date Submitted to Icario</i>	<i>Notes about this record.</i>
elsa.aos@icariohealth.com	5553334444	Aos	Elsa	Agent	11111	Add	7/2/21	BS NENY
elsa.aos@icariohealth.com	5553334444	Aos	Elsa	Agent	11111	Add	7/2/21	BCBS WNY

Note: data is *not* required in the “Mobile Phone” & “List Company Profile” columns