AssuriCare

Online Enrollment

Release Notes: June 21, 2021

Summary of Contents

Online Enrollment Portal

- Who is responsible for process areas
- What are the benefits of the new feature
- How to electronically onboard new clients
- Where to go for help or questions

Electronically onboard new clients

Onboard new clients electronically

Introducing a digital enrollment form with the ability to send secure payment information

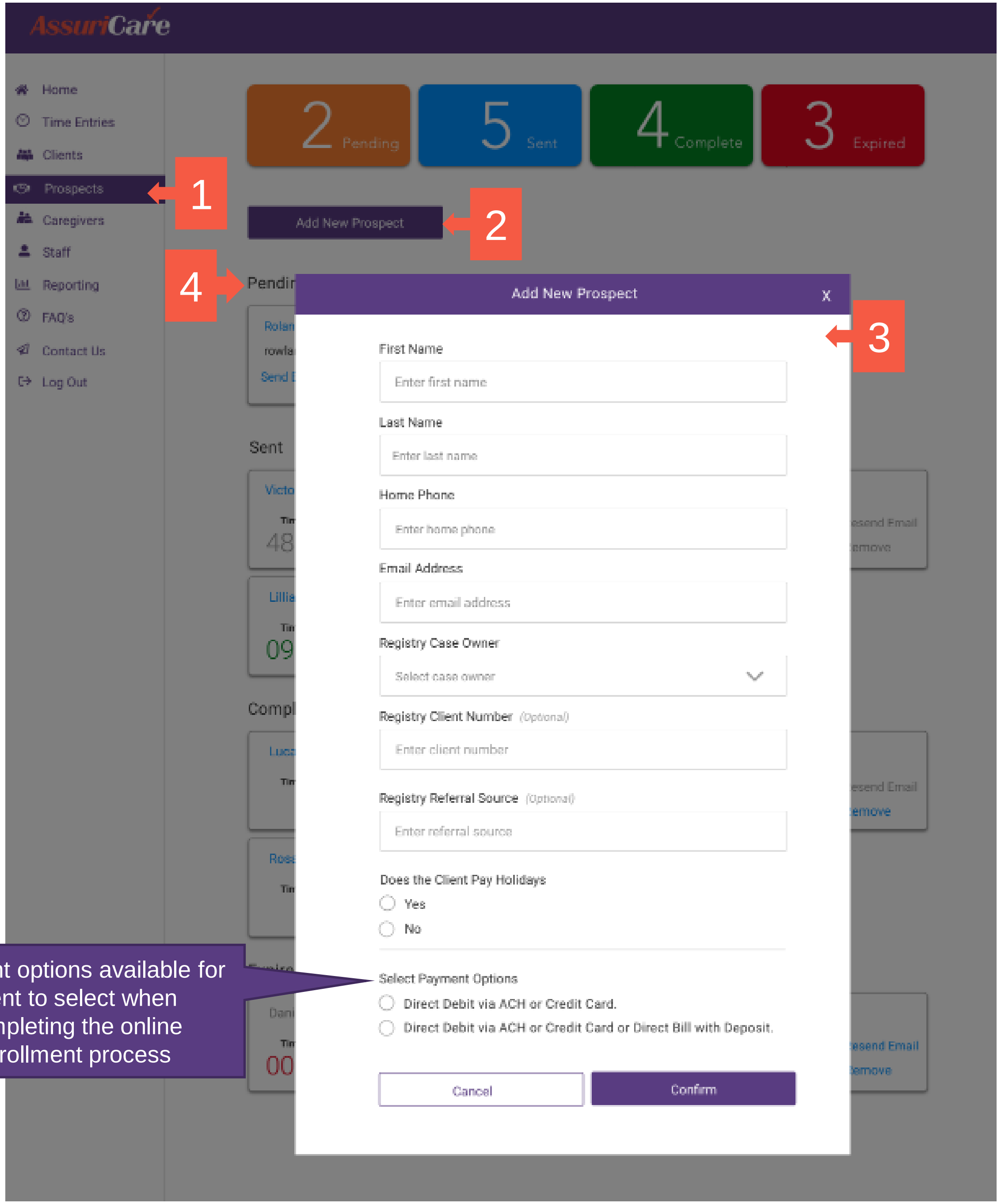
FEATURE BENEFITS

- Replace paper process by allowing providers to create a new client online and send an enrollment link for the client to complete the setup process
- Added a Prospect page to track the status of potential clients
- Secure payment options through Forte

Start the process

HOW TO USE THIS: Online Client Enrollment

1. Click on the “Prospects” menu option
2. Click the “Add New Prospect” button
3. Complete the Add New Prospect form and click the “Confirm” button
4. Clients will show under the “Pending” section



Payment options available for client to select when completing the online enrollment process

Send & monitor enrollment emails

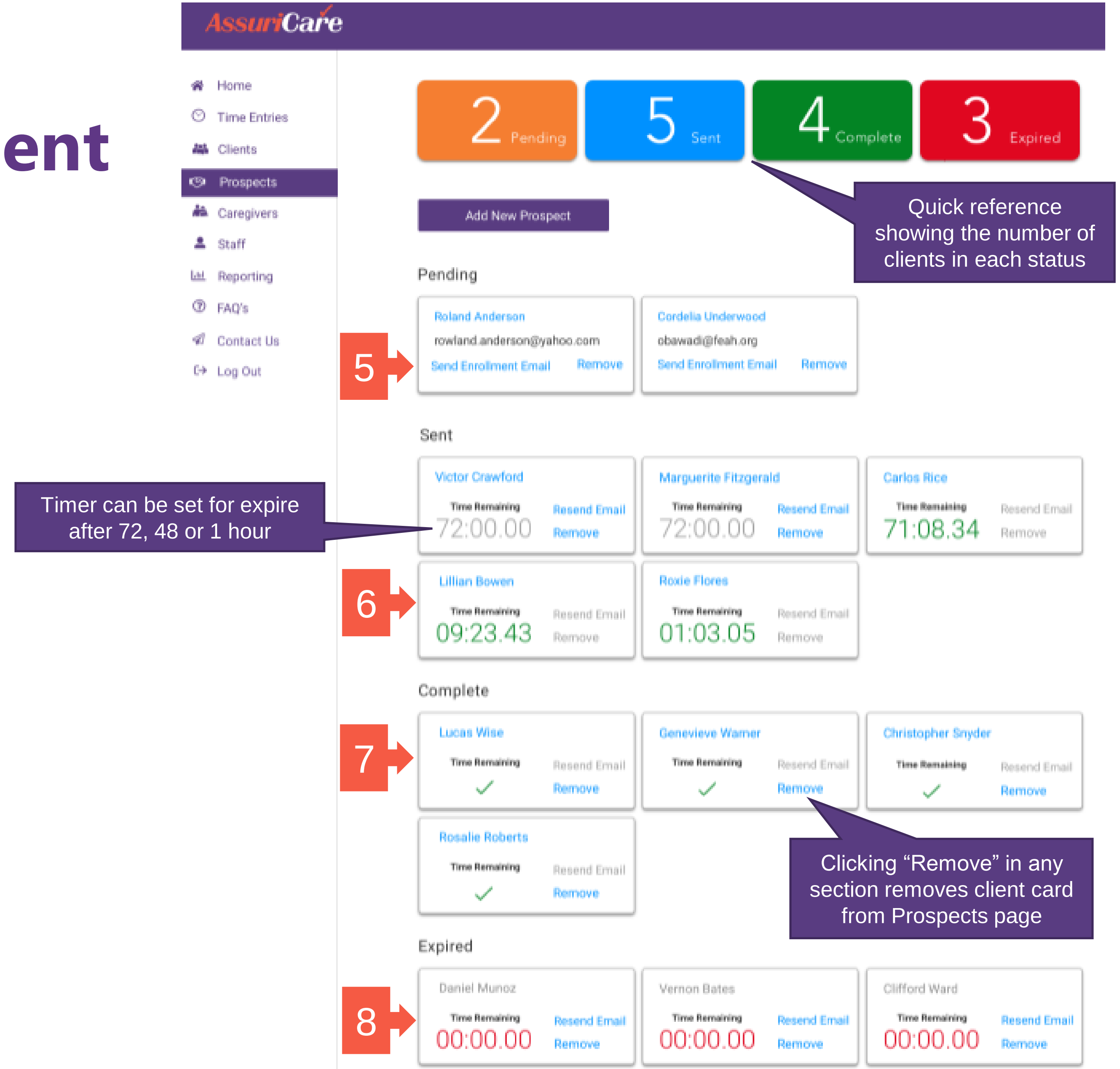
HOW TO USE THIS: Online Client Enrollment

5. Click “Send Enrollment Email” to send email to client to start the online enrollment process. Client moves to “Sent” section.

6. Under the “Sent” section, the timer indicates when the online enrollment link will expire for the client (Gray indicates the client has not clicked on the link)

7. Once a client completes online enrollment, their card appears in the “Complete” section

8. If a client lets the online enrollment link expire, select “Resend Email” to send the online enrollment link

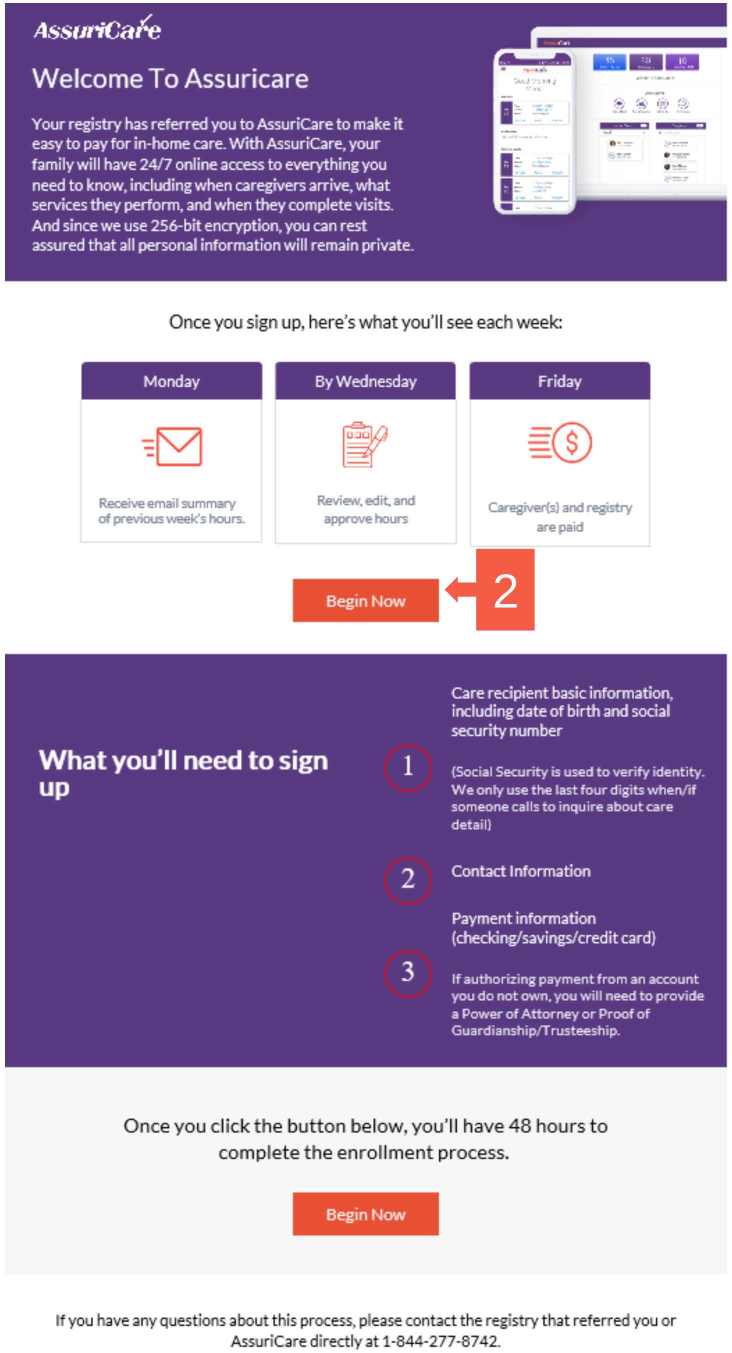


Clients create accounts electronically

HOW TO USE THIS: Create Client Account

1. Client receives Welcome Email once the provider clicks "Send Enrollment Email" on the Prospects page (not shown)

2. Click the “Begin Now” button to launch the AssuriCare Signup workflow

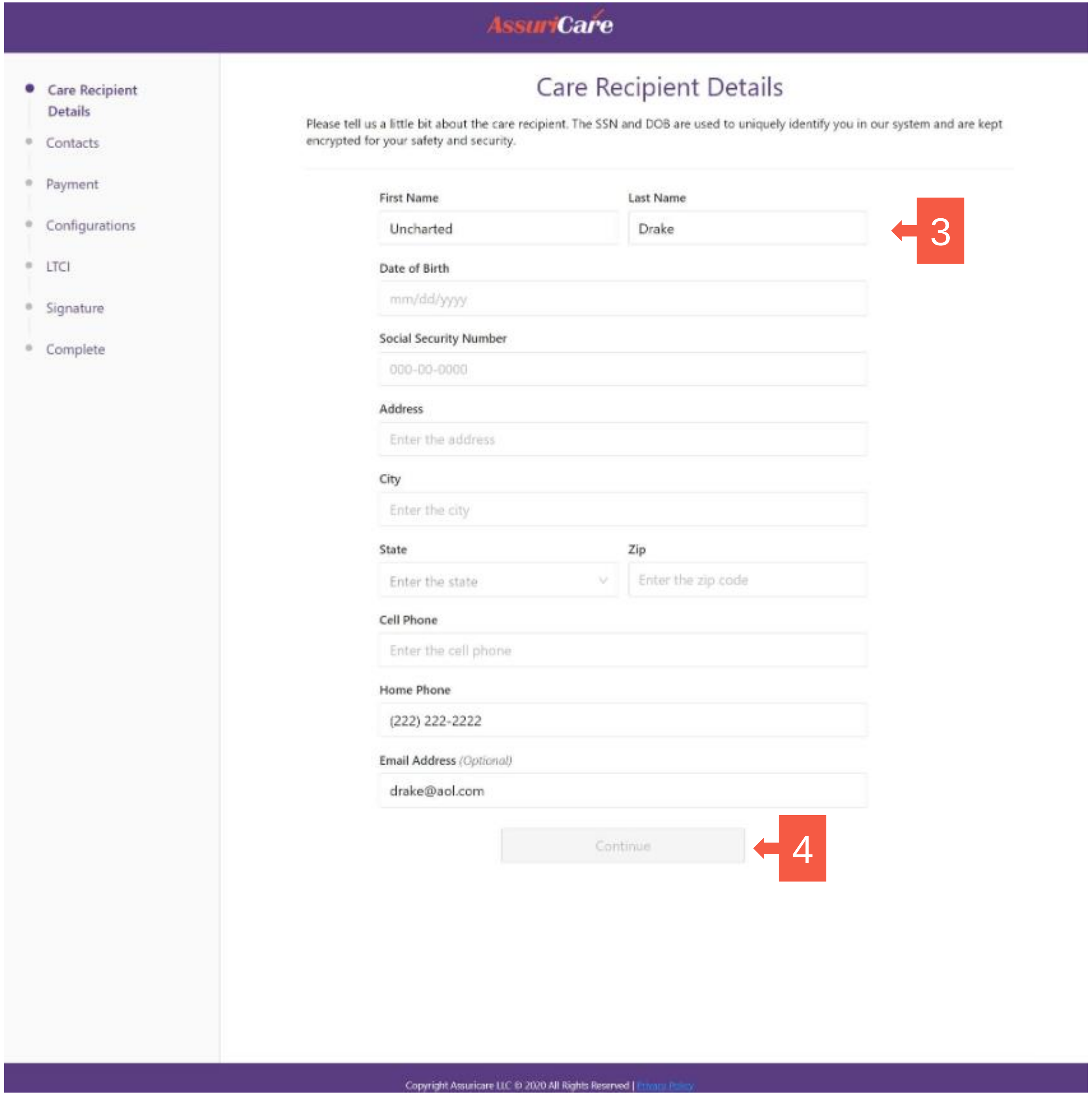


Enter care recipient detail

HOW TO USE THIS: Create Client Account

3. Fill in the Care Recipient Details form

4. Click the “Continue” button to go to the next step



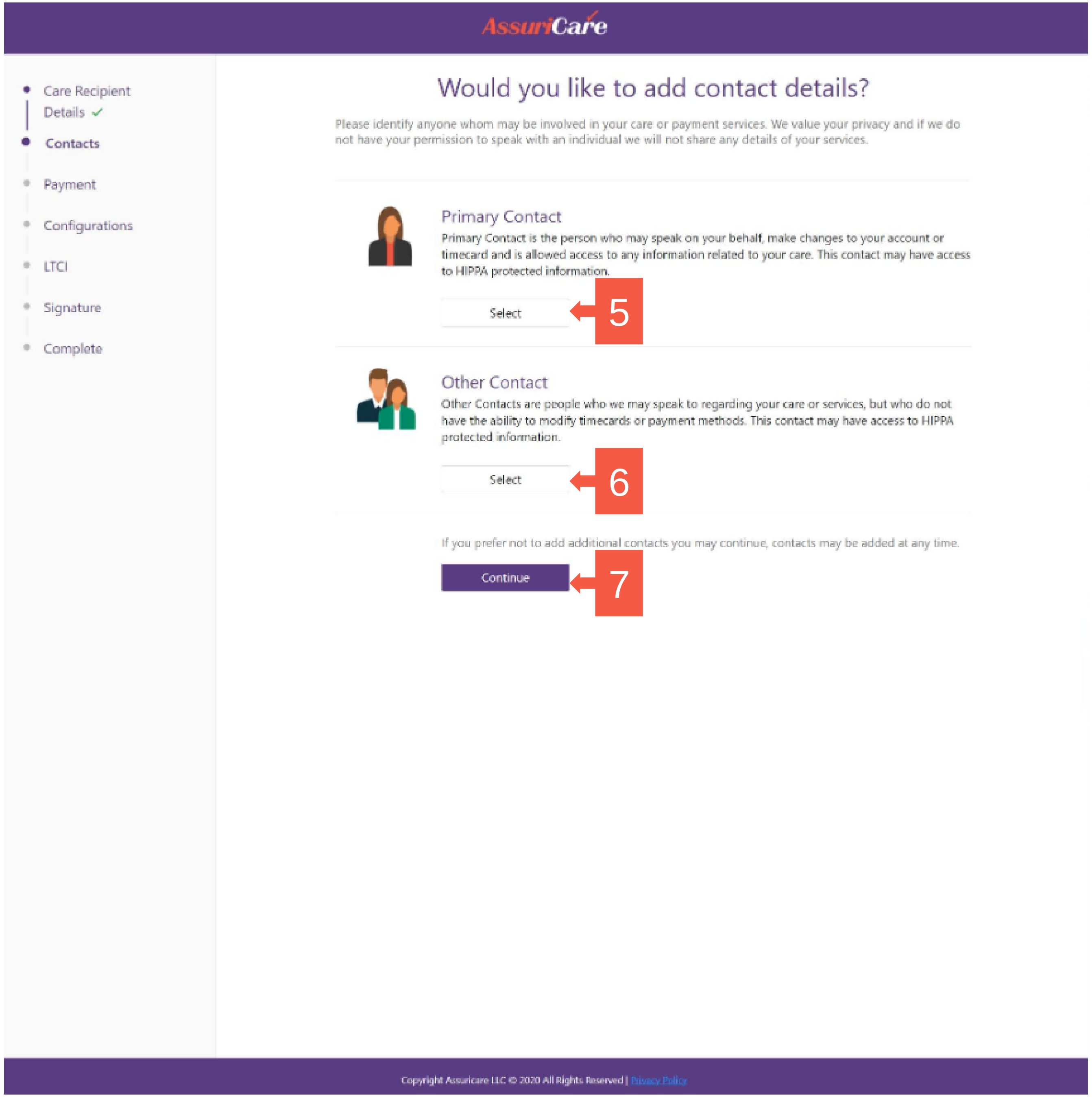
Add contacts

HOW TO USE THIS: Create Client Account

5. To add a primary contact, click "Select" under the Primary Contact section. Only one contact can be added as a primary contact

6. To add other contacts, click “Select” under the Other Contact section

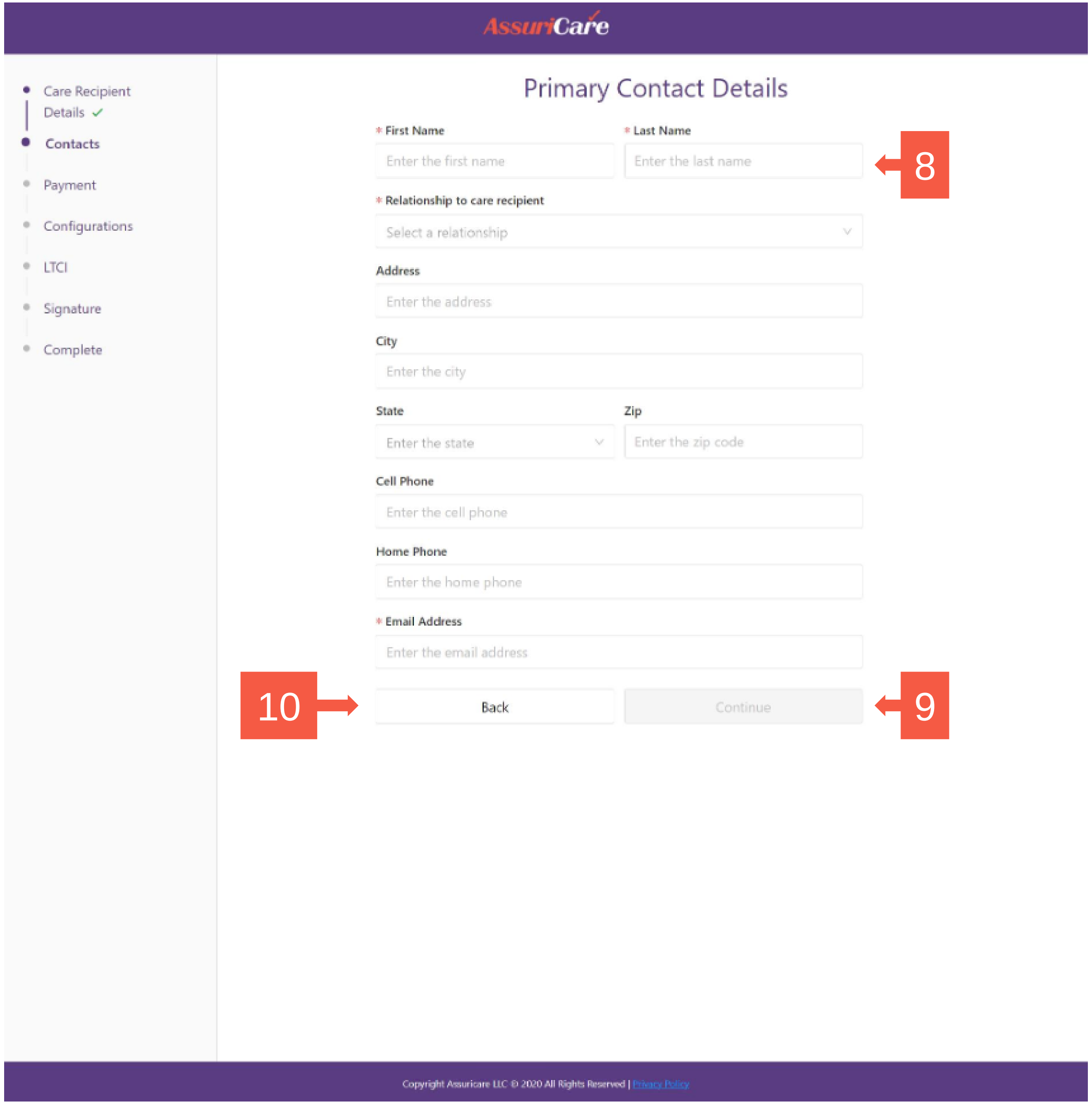
7. Click the “Continue” button to skip this section



Enter contact detail

HOW TO USE THIS: Create Client Account

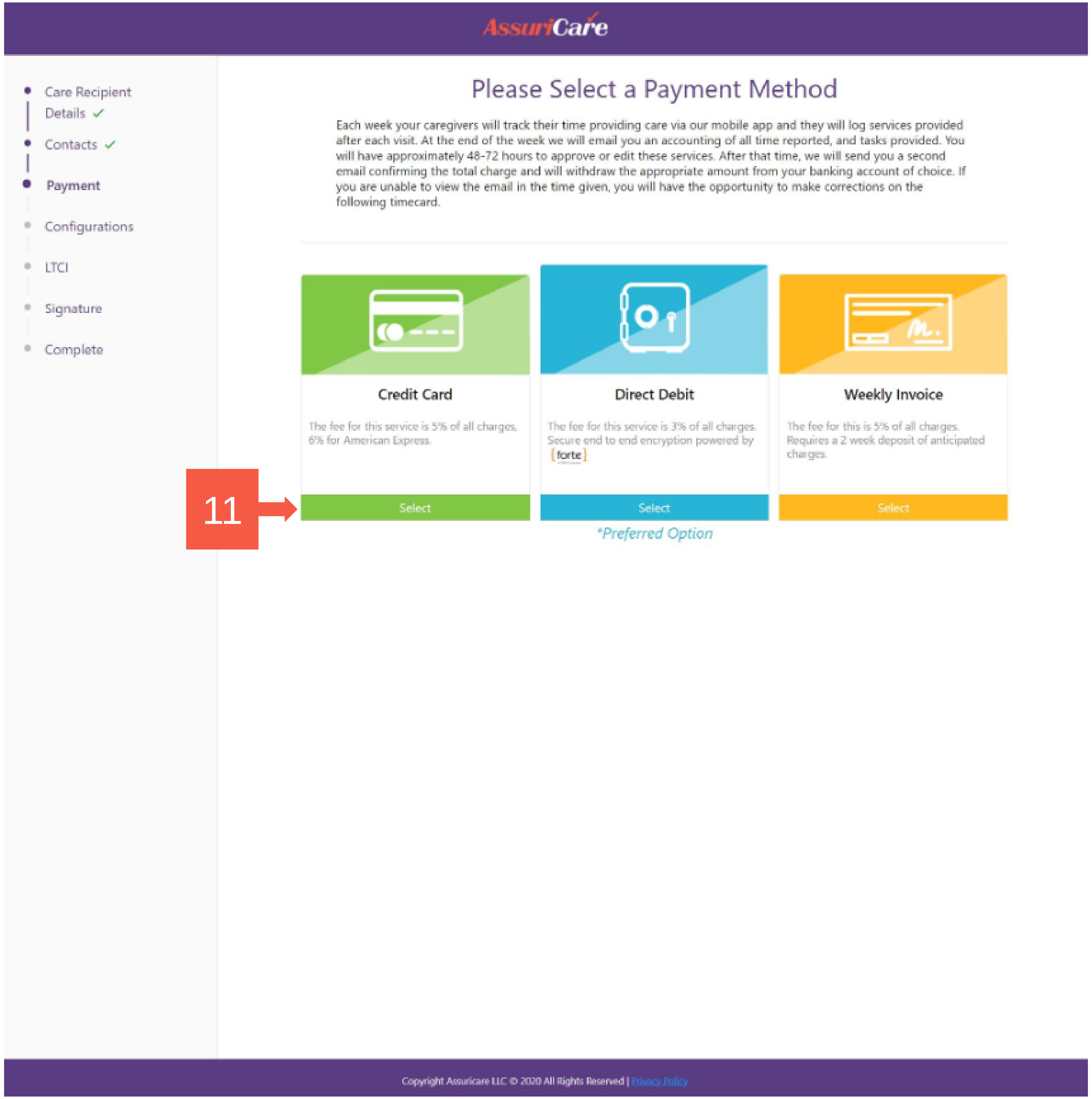
8. Fill in the Primary Contact or Other Contact Details form
9. Click the “Continue” button to go to the next step
10. Click the “Back” button to go to previous page



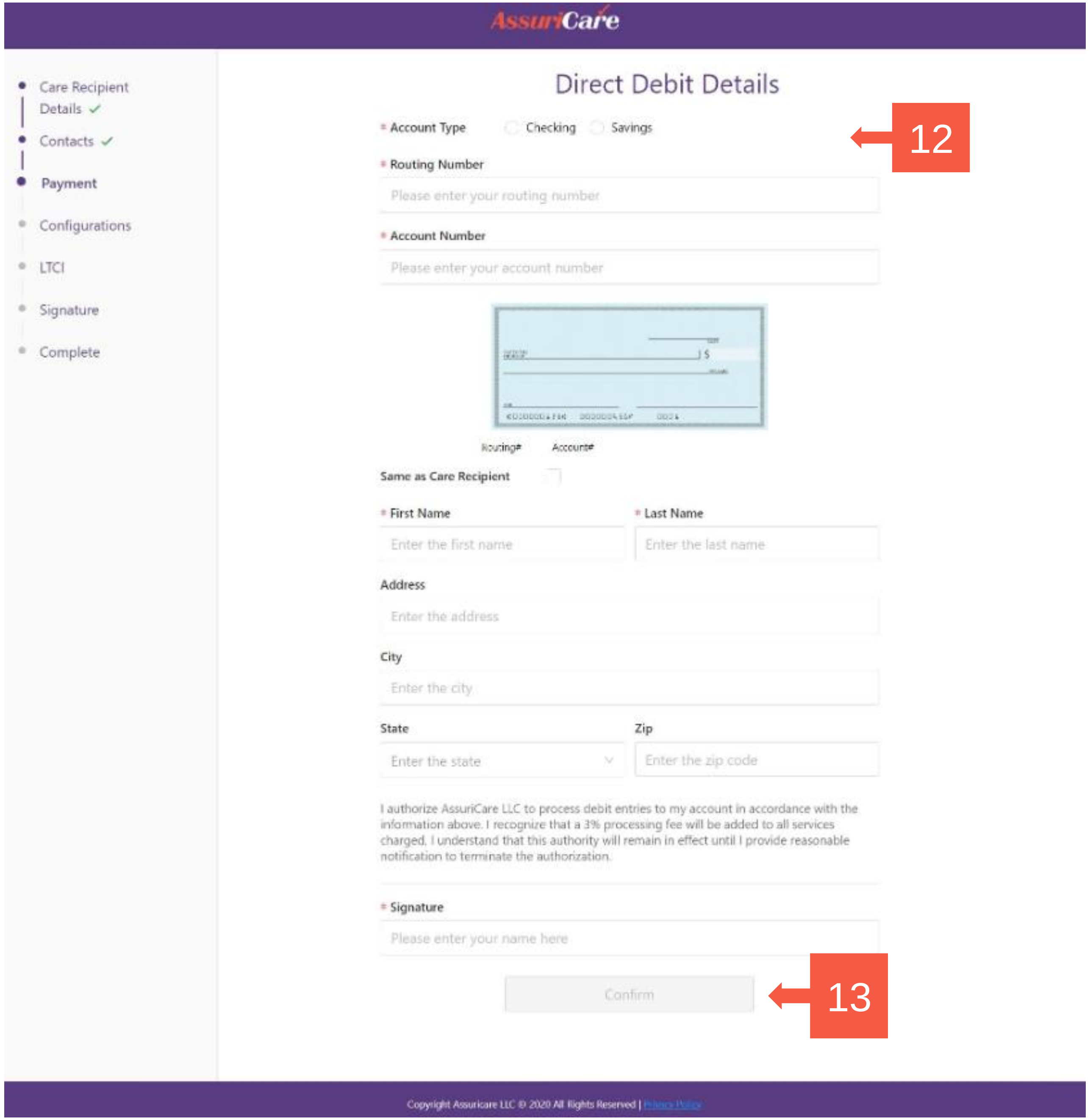
Pick a payment option

HOW TO USE THIS: Create Client Account

11. Click “Select” on one of the payment selection options to enter payment information



Enter direct debit info



HOW TO USE THIS: Create Client Account

12. Fill in the Direct Debit Details

13. Click the "Confirm" button to go to the next step

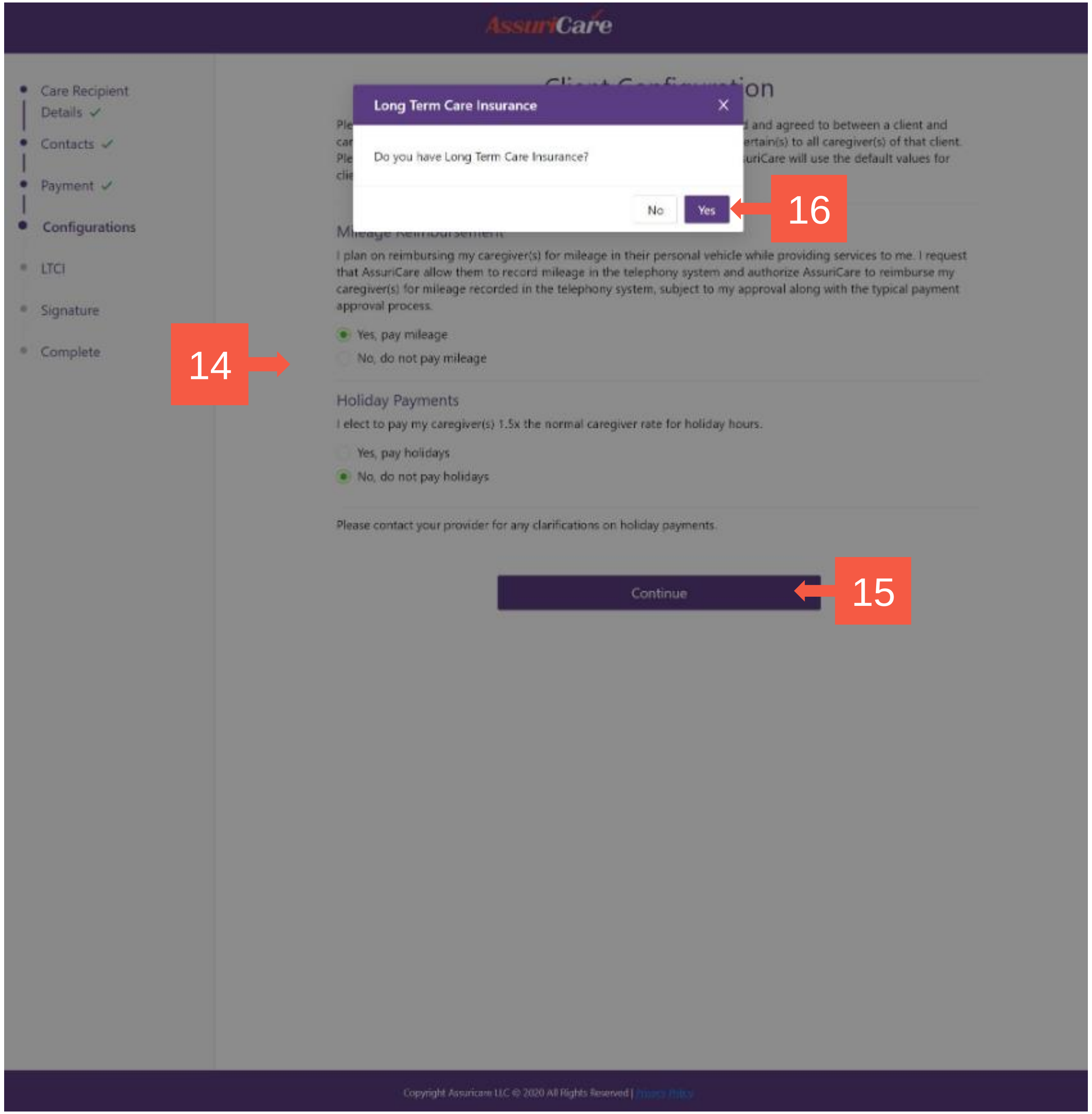
Select Configuration Options

HOW TO USE THIS: Create Client Account

14. Complete the Client Configuration section

15. Click “Continue.” Once “Continue is clicked, the Long Term Care Insurance popup box will appear

16. If you have Long-Term Care insurance and would like to submit claims via AssuriCare, click “Yes”

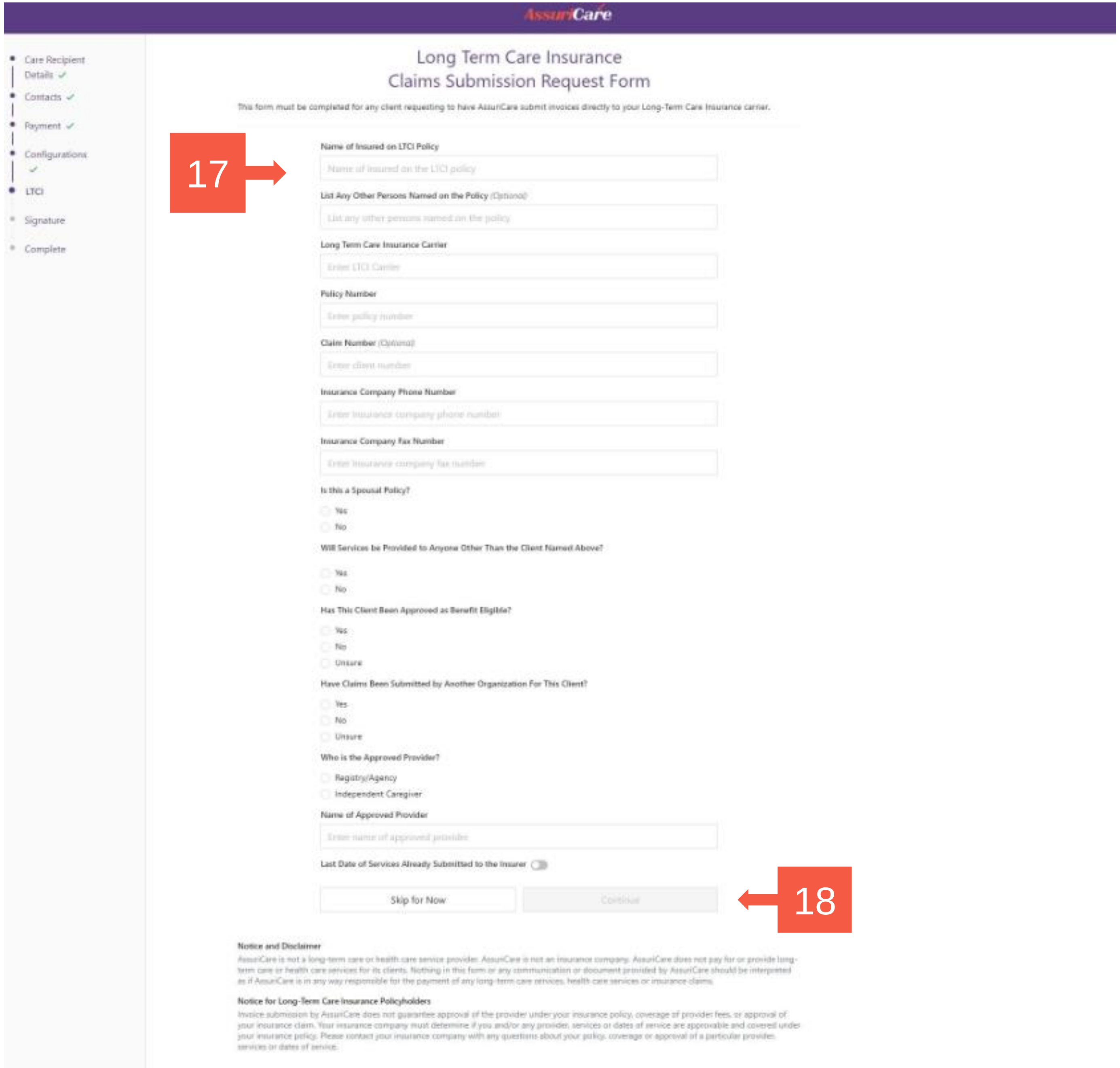


Long Term Care Insurance Claims Form

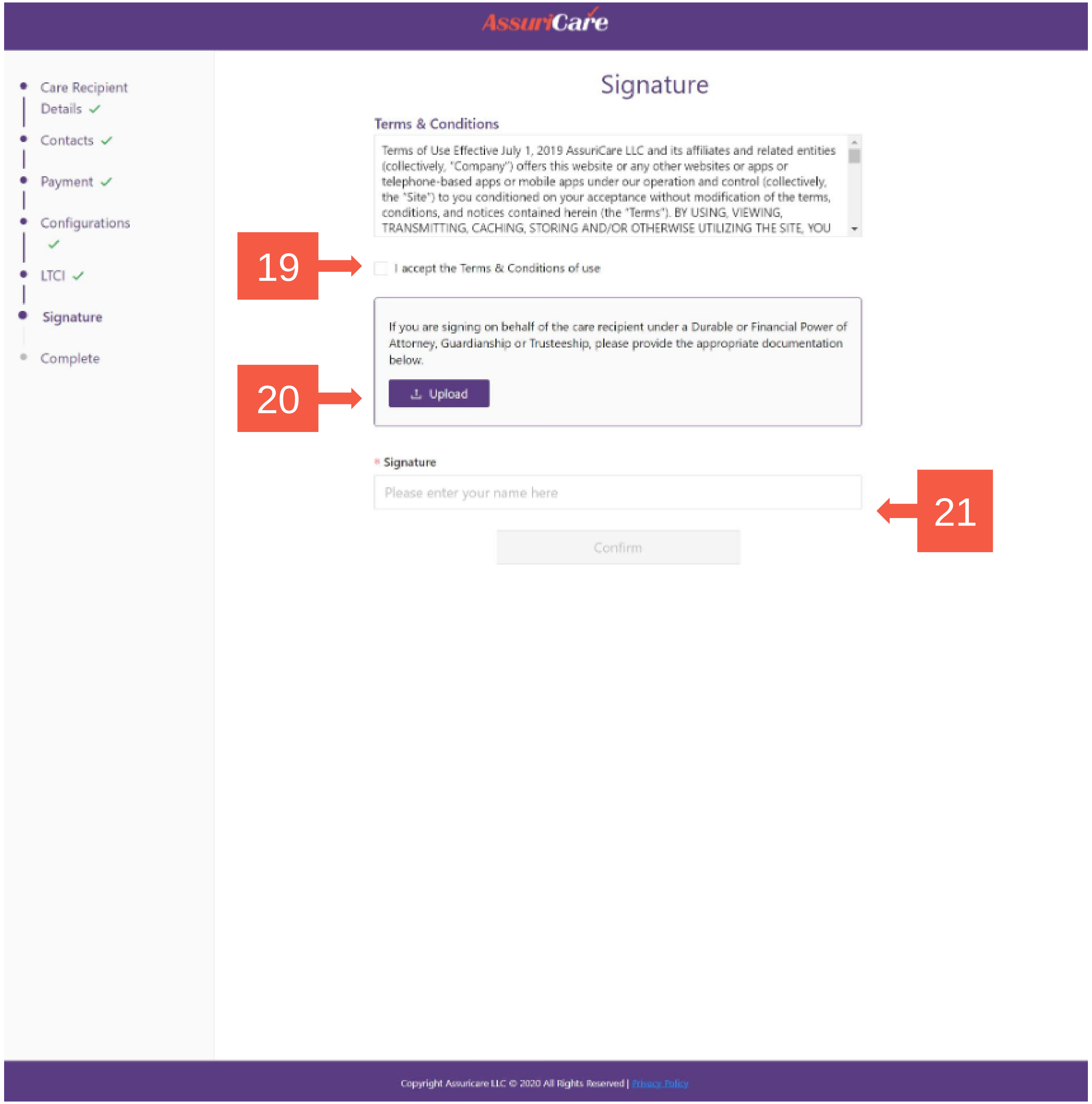
HOW TO USE THIS: Create Client Account

17. Complete the Long Term Care Insurance Claims form

18. You can either click "Skip for Now" or "Continue" to go to the next section



Review terms & sign



HOW TO USE THIS: Create Client Account

19. Read the "Terms & Conditions", then check the box

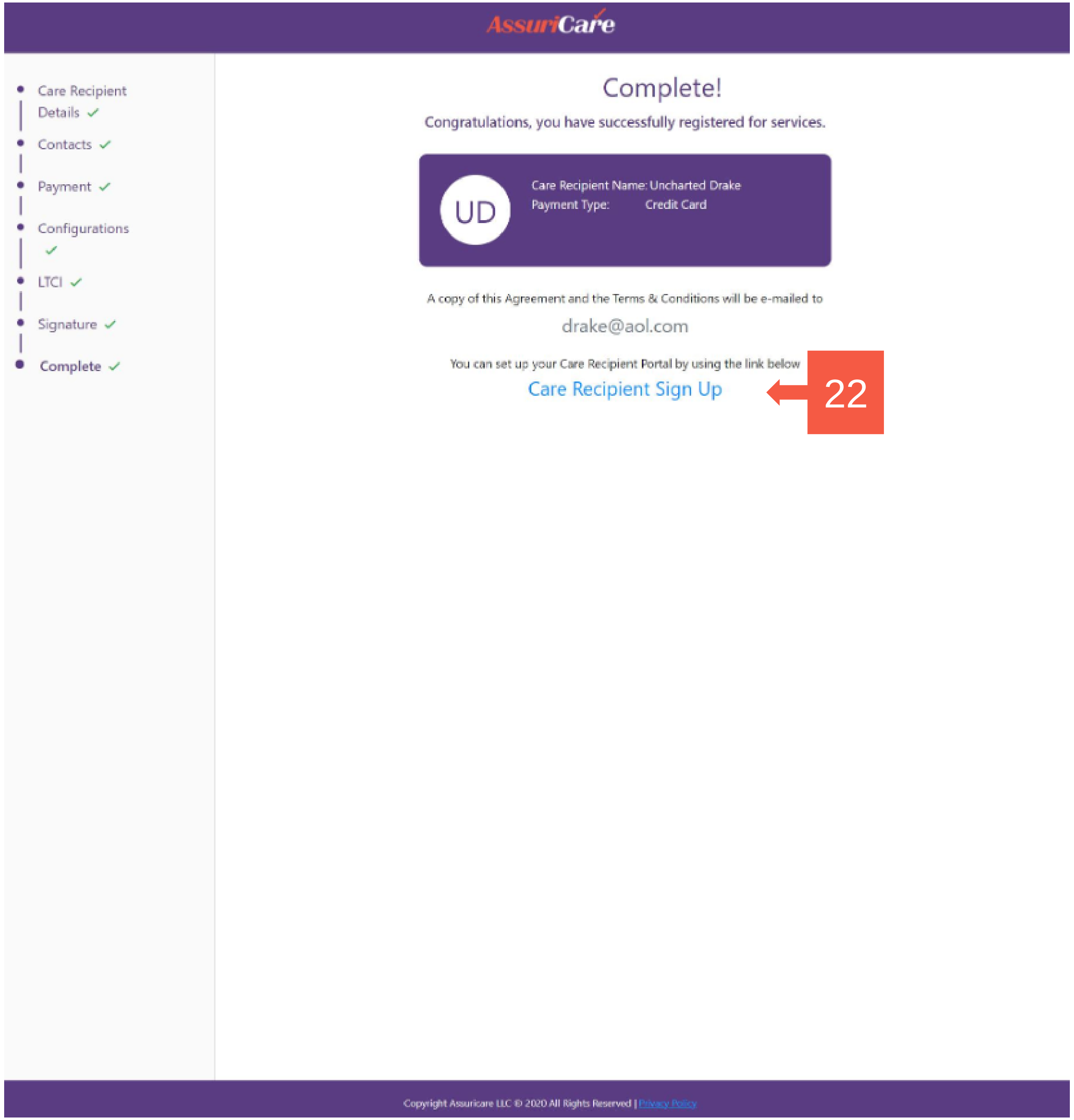
20. If signing on behalf of the care recipient, upload the applicable documentation

21. Enter your name in the signature field then click "Confirm" to go to the next step

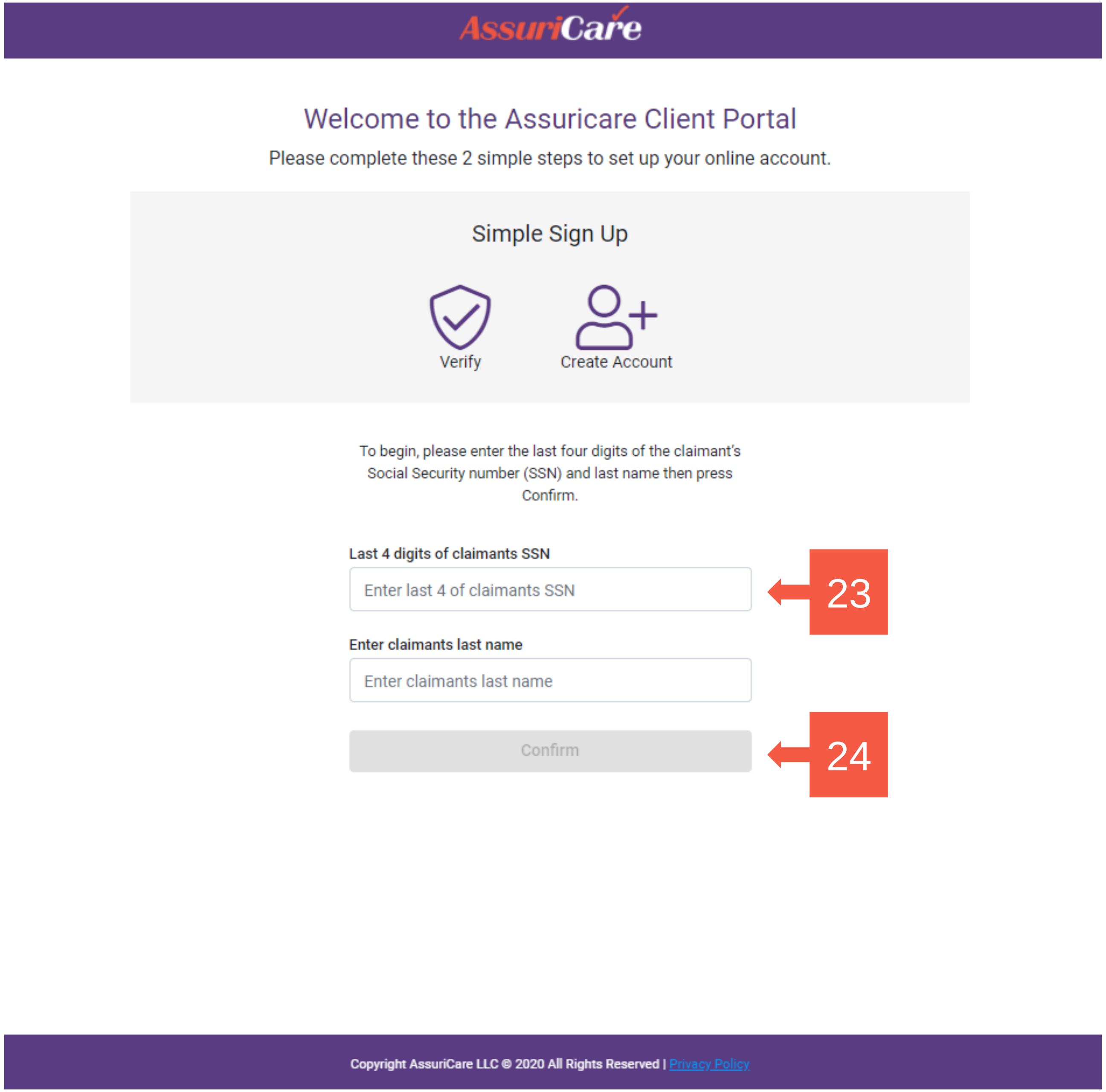
Create online portal account

HOW TO USE THIS: Create Client Account

22. Click “Care Recipient Sign Up” to create your account to the online portal



Enter SSN



HOW TO USE THIS: Create Client Account

23. Enter the last four of the claimant's SSN and the claimant's last name

24. Click "Confirm" to go to the next step

Review terms & create password to finish

HOW TO USE THIS: Create Client Account

25. Read the “Terms & Conditions”, then check the box

26. Create a new password and confirm the new password

27. Click “Confirm” to finish the AssuriCare Signup process and start using the online portal