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# Online Enrollment

Release Notes: June 21, 2021

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# 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

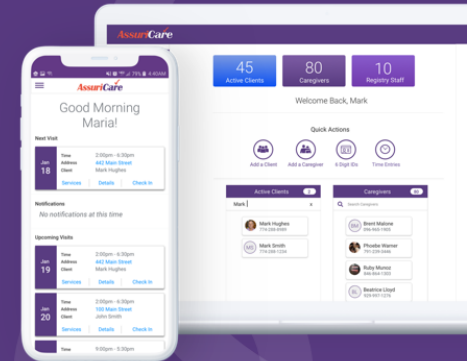
## FEATURE BENEFITS

- ✓ 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

**AssuriCare**

## Welcome to AssuriCare

Your registry has referred you to AssuriCare to make it easy to pay for in-home care. With AssuriCare, your family will have 24/7 online access to everything you need to know, including when caregivers arrive, what services they perform, and when they complete visits. And since we use 256-bit encryption, you can rest assured that all personal information will remain private.



# 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

The screenshot displays the AssuriCare web application interface. At the top, a navigation bar includes the AssuriCare logo and a sidebar menu with options: Home, Time Entries, Clients, Prospects, Caregivers, Staff, Reporting, FAQ's, Contact Us, and Log Out. The 'Prospects' menu item is highlighted with a red arrow and the number 1. Above the main content area, four status filters are shown: 2 Pending (orange), 5 Sent (blue), 4 Complete (green), and 3 Expired (red). Below these filters, an 'Add New Prospect' button is highlighted with a red arrow and the number 2. A modal form titled 'Add New Prospect' is open, with a red arrow and the number 3 pointing to its top right corner. The form contains the following fields: First Name, Last Name, Home Phone, Email Address, Registry Case Owner (a dropdown menu), Registry Client Number (Optional), and Registry Referral Source (Optional). Below these fields are two radio button options for 'Does the Client Pay Holidays': Yes and No. At the bottom of the form are two buttons: 'Cancel' and 'Confirm'. A red arrow and the number 4 point to the 'Pending' section in the background. A callout box with a purple background and white text points to the 'Confirm' button, stating: 'Payment options available for client to select when completing the online enrollment process'.

AssuriCare

Home  
Time Entries  
Clients  
Prospects  
Caregivers  
Staff  
Reporting  
FAQ's  
Contact Us  
Log Out

2 Pending 5 Sent 4 Complete 3 Expired

Add New Prospect

Add New Prospect X

First Name  
Enter first name

Last Name  
Enter last name

Home Phone  
Enter home phone

Email Address  
Enter email address

Registry Case Owner  
Select case owner

Registry Client Number (Optional)  
Enter client number

Registry Referral Source (Optional)  
Enter referral source

Does the Client Pay Holidays  
☐ Yes  
☐ No

Select Payment Options  
☐ Direct Debit via ACH or Credit Card.  
☐ Direct Debit via ACH or Credit Card or Direct Bill with Deposit.

Cancel Confirm

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

# Send & monitor enrollment emails

## HOW TO USE THIS: Online Client Enrollment

- Click "Send Enrollment Email" to send email to client to start the online enrollment process. Client moves to "Sent" section.
- 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)
- Once a client completes online enrollment, their card appears in the "Complete" section
- If a client lets the online enrollment link expire, select "Resend Email" to send the online enrollment link

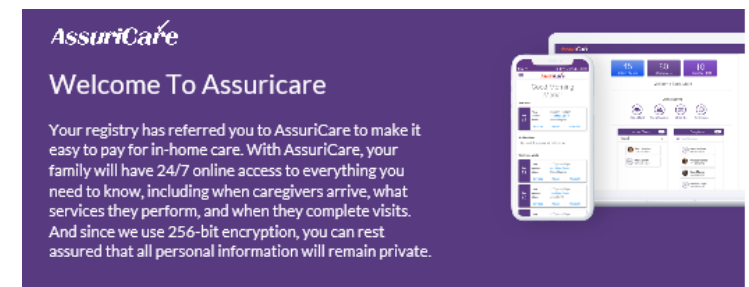
The screenshot displays the AssuriCare Prospects page. On the left is a navigation menu with options: Home, Time Entries, Clients, Prospects (highlighted), Caregivers, Staff, Reporting, FAQ's, Contact Us, and Log Out. The main content area shows four status tabs: Pending (2), Sent (5), Complete (4), and Expired (3). A callout points to these tabs, stating: "Quick reference showing the number of clients in each status". Below the tabs is an "Add New Prospect" button. The page is divided into four sections: Pending, Sent, Complete, and Expired. Step 5 points to the "Send Enrollment Email" button in the Pending section. Step 6 points to a client card in the Sent section, with a callout: "Timer can be set for expire after 72, 48 or 1 hour". Step 7 points to a client card in the Complete section. Step 8 points to a client card in the Expired section. A callout points to the "Remove" button in the Complete section, stating: "Clicking 'Remove' in any section removes client card from Prospects page".

Status	Client Name	Email	Time Remaining	Actions
Pending	Roland Anderson	rowland.anderson@yahoo.com	-	Send Enrollment Email, Remove
Pending	Cordelia Underwood	obawadi@feah.org	-	Send Enrollment Email, Remove
Sent	Victor Crawford	-	72:00.00	Resend Email, Remove
Sent	Marguerite Fitzgerald	-	72:00.00	Resend Email, Remove
Sent	Carlos Rice	-	71:08.34	Resend Email, Remove
Sent	Lillian Bowen	-	09:23.43	Resend Email, Remove
Sent	Roxie Flores	-	01:03.05	Resend Email, Remove
Complete	Lucas Wise	-	✓	Resend Email, Remove
Complete	Genevieve Warner	-	✓	Resend Email, Remove
Complete	Christopher Snyder	-	✓	Resend Email, Remove
Complete	Rosalie Roberts	-	✓	Resend Email, Remove
Expired	Daniel Munoz	-	00:00.00	Resend Email, Remove
Expired	Vernon Bates	-	00:00.00	Resend Email, Remove
Expired	Clifford Ward	-	00:00.00	Resend Email, Remove

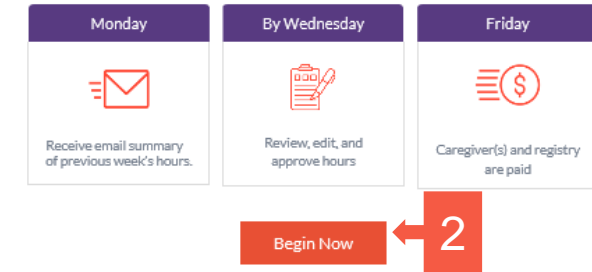
# Clients create accounts electronically

## 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



Once you sign up, here's what you'll see each week:



### What you'll need to sign up

- 1 Care recipient basic information, including date of birth and social security number  
(Social Security is used to verify identity. We only use the last four digits when/if someone calls to inquire about care detail)
- 2 Contact Information  
Payment information (checking/savings/credit card)
- 3 If authorizing payment from an account you do not own, you will need to provide a Power of Attorney or Proof of Guardianship/Trusteeship.

Once you click the button below, you'll have 48 hours to complete the enrollment process.

Begin Now

If you have any questions about this process, please contact the registry that referred you or AssuriCare directly at 1-844-277-8742.

# 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

- Care Recipient Details
- Contacts
- Payment
- Configurations
- LTCI
- Signature
- Complete

AssuriCare

### Care Recipient Details

Please tell us a little bit about the care recipient. The SSN and DOB are used to uniquely identify you in our system and are kept encrypted for your safety and security.

First Name

Uncharted

Last Name

Drake

Date of Birth

mm/dd/yyyy

Social Security Number

000-00-0000

Address

Enter the address

City

Enter the city

State

Enter the state

Zip

Enter the zip code

Cell Phone

Enter the cell phone

Home Phone

(222) 222-2222

Email Address (Optional)

drake@aol.com

Continue

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# 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

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Care Recipient Details ✓

Contacts

Payment

Configurations

LTCI

Signature

Complete

Would you like to add contact details?

Please identify anyone whom may be involved in your care or payment services. We value your privacy and if we do not have your permission to speak with an individual we will not share any details of your services.

Primary Contact

Primary Contact is the person who may speak on your behalf, make changes to your account or timecard and is allowed access to any information related to your care. This contact may have access to HIPPA protected information.

Select

Other Contact

Other Contacts are people who we may speak to regarding your care or services, but who do not have the ability to modify timecards or payment methods. This contact may have access to HIPPA protected information.

Select

If you prefer not to add additional contacts you may continue, contacts may be added at any time.

Continue

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# 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

The screenshot shows the AssuriCare web interface for entering contact details. On the left is a sidebar menu with options: Care Recipient Details (checked), Contacts, Payment, Configurations, LTCI, Signature, and Complete. The main area is titled "Primary Contact Details" and contains several input fields: First Name, Last Name, Relationship to care recipient (a dropdown), Address, City, State (a dropdown), Zip, Cell Phone, Home Phone, and Email Address. At the bottom are "Back" and "Continue" buttons. Red callout boxes with numbers are placed over the form: box 8 points to the First Name and Last Name fields; box 9 points to the Continue button; and box 10 points to the Back button.

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Primary Contact Details

\* First Name  \* Last Name

\* Relationship to care recipient

Address

City

State  Zip

Cell Phone

Home Phone

\* Email Address

10 Back Continue 9

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# 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

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- Care Recipient Details ✓
- Contacts ✓
- Payment
- Configurations
- LTCI
- Signature
- Complete

Please Select a Payment Method


Each week your caregivers will track their time providing care via our mobile app and they will log services provided after each visit. At the end of the week we will email you an accounting of all time reported, and tasks provided. You will have approximately 48-72 hours to approve or edit these services. After that time, we will send you a second email confirming the total charge and will withdraw the appropriate amount from your banking account of choice. If you are unable to view the email in the time given, you will have the opportunity to make corrections on the following timecard.




Credit Card

The fee for this service is 5% of all charges.  
6% for American Express.


Select



Direct Debit

The fee for this service is 3% of all charges.  
Secure end to end encryption powered by 

Select



Weekly Invoice

The fee for this is 5% of all charges.  
Requires a 2 week deposit of anticipated charges.

Select

11

\*Preferred Option

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11

# 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


- Care Recipient Details ✓
- Contacts ✓
- Payment
- Configurations
- LTCI
- Signature
- Complete

### Direct Debit Details

\* Account Type ☐ Checking ☐ Savings

\* Routing Number  
Please enter your routing number

\* Account Number  
Please enter your account number



Routing# Account#

Same as Care Recipient ☐

\* First Name  
Enter the first name

\* Last Name  
Enter the last name

Address  
Enter the address

City  
Enter the city

State  
Enter the state

Zip  
Enter the zip code

I authorize AssuriCare LLC to process debit entries to my account in accordance with the information above. I recognize that a 3% processing fee will be added to all services charged. I understand that this authority will remain in effect until I provide reasonable notification to terminate the authorization.

\* Signature  
Please enter your name here

Confirm

# 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"

The screenshot shows the AssuriCare website's 'Client Configuration' page. On the left is a sidebar with a list of configuration steps: Care Recipient Details, Contacts, Payment, Configurations, LTCI, Signature, and Complete. The 'Configurations' step is currently selected. A red arrow labeled '14' points to this sidebar. The main content area contains several sections: 'Long Term Care Insurance' (with a 'Do you have Long Term Care Insurance?' question and 'No'/'Yes' buttons, where a red arrow labeled '16' points to the 'Yes' button), 'Mileage reimbursement' (with a text block and radio buttons for 'Yes, pay mileage' and 'No, do not pay mileage'), and 'Holiday Payments' (with a text block and radio buttons for 'Yes, pay holidays' and 'No, do not pay holidays'). At the bottom of the main content area is a large purple 'Continue' button, with a red arrow labeled '15' pointing to it. The AssuriCare logo is at the top right, and a copyright notice is at the bottom.

# 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

- Care Recipient Details ✓
- Contacts ✓
- Payment ✓
- Configurations ✓
- LTCI
- Signature ✓
- Complete

### Long Term Care Insurance Claims Submission Request Form

This form must be completed for any client requesting to have AssuriCare submit invoices directly to your Long-Term Care Insurance carrier.

**17** →

**Name of Insured on LTCI Policy**

**List Any Other Persons Named on the Policy (Optional)**

**Long Term Care Insurance Carrier**

**Policy Number**

**Claim Number (Optional)**

**Insurance Company Phone Number**

**Insurance Company Fax Number**

**Is this a Spousal Policy?**  
☐ Yes  
☐ No

**Will Services be Provided to Anyone Other Than the Client Named Above?**  
☐ Yes  
☐ No

**Has This Client Been Approved as Benefit Eligible?**  
☐ Yes  
☐ No  
☐ Unsure

**Have Claims Been Submitted by Another Organization For This Client?**  
☐ Yes  
☐ No  
☐ Unsure

**Who is the Approved Provider?**  
☐ Registry/Agency  
☐ Independent Caregiver

**Name of Approved Provider**

**Last Date of Services Already Submitted to the Insurer**

**18** ←

**Notice and Disclaimer**  
 AssuriCare is not a long-term care or health care service provider. AssuriCare is not an insurance company. AssuriCare does not pay for or provide long-term care or health care services for its clients. Nothing in this form or any communication or document provided by AssuriCare should be interpreted as if AssuriCare is in any way responsible for the payment of any long-term care services, health care services or insurance claims.

**Notice for Long-Term Care Insurance Policyholders**  
 Invoice submission by AssuriCare does not guarantee approval of the provider under your insurance policy, coverage of provider fees, or approval of your insurance claim. Your insurance company must determine if you and/or any provider, services or dates of service are approvable and covered under your insurance policy. Please contact your insurance company with any questions about your policy, coverage or approval of a particular provider, services or dates of service.

# 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

The screenshot shows the 'Signature' page of the AssuriCare client account creation process. On the left is a vertical navigation menu with the following items: Care Recipient Details (with a green checkmark), Contacts (with a green checkmark), Payment (with a green checkmark), Configurations (with a green checkmark), LTCI (with a green checkmark), Signature (highlighted with a blue dot), and Complete. The main content area is titled 'Signature'. It contains a 'Terms & Conditions' section with a scrollable text area showing the terms of use. Below this is a checkbox labeled 'I accept the Terms & Conditions of use'. Underneath is a box for uploading documentation, stating 'If you are signing on behalf of the care recipient under a Durable or Financial Power of Attorney, Guardianship or Trusteeship, please provide the appropriate documentation below.' and featuring an 'Upload' button. At the bottom is a 'Signature' section with a text input field labeled 'Please enter your name here' and a 'Confirm' button. Three red callout boxes with white numbers and arrows point to specific elements: '19' points to the 'Terms & Conditions' text, '20' points to the 'Upload' button, and '21' points to the signature input field.

AssuriCare

Signature

Terms & Conditions

Terms of Use Effective July 1, 2019 AssuriCare LLC and its affiliates and related entities (collectively, "Company") offers this website or any other websites or apps or telephone-based apps or mobile apps under our operation and control (collectively, the "Site") to you conditioned on your acceptance without modification of the terms, conditions, and notices contained herein (the "Terms"). BY USING, VIEWING, TRANSMITTING, CACHING, STORING AND/OR OTHERWISE UTILIZING THE SITE, YOU

19

☐ I accept the Terms & Conditions of use

20

If you are signing on behalf of the care recipient under a Durable or Financial Power of Attorney, Guardianship or Trusteeship, please provide the appropriate documentation below.

Upload

Signature

Please enter your name here

21

Confirm

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# 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

The screenshot shows the AssuriCare website's registration completion page. On the left is a vertical sidebar with a list of steps: Care Recipient Details, Contacts, Payment, Configurations, LTCI, Signature, and Complete. Each step has a green checkmark. The 'Complete' step is highlighted. The main content area has a purple header with the AssuriCare logo. Below the header, it says 'Complete!' and 'Congratulations, you have successfully registered for services.' A purple box contains a circular logo with 'UD' and text: 'Care Recipient Name: Uncharted Drake' and 'Payment Type: Credit Card'. Below this, it says 'A copy of this Agreement and the Terms & Conditions will be e-mailed to drake@aol.com'. At the bottom, it says 'You can set up your Care Recipient Portal by using the link below' followed by a blue link 'Care Recipient Sign Up'. A red arrow points to this link, and a red box with the number '22' is next to it. The footer contains copyright information: 'Copyright Assuricare LLC © 2020 All Rights Reserved | Privacy Policy'.

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- Care Recipient Details ✓
- Contacts ✓
- Payment ✓
- Configurations ✓
- LTCI ✓
- Signature ✓
- Complete ✓

**Complete!**

Congratulations, you have successfully registered for services.

**UD** Care Recipient Name: Uncharted Drake  
Payment Type: Credit Card

A copy of this Agreement and the Terms & Conditions will be e-mailed to  
drake@aol.com

You can set up your Care Recipient Portal by using the link below  
[Care Recipient Sign Up](#)

22

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# 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

## Welcome to the Assuricare Client Portal

Please complete these 2 simple steps to set up your online account.

### Simple Sign Up



Verify



Create Account

To begin, please enter the last four digits of the claimant's Social Security number (SSN) and last name then press Confirm.

Last 4 digits of claimants SSN

Enter last 4 of claimants SSN

23

Enter claimants last name

Enter claimants last name

Confirm

24

# 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

Jimmy Smith  
1234 Main St  
Anytown  
MA 012340000

Not You? Call us on 1-844-277-8742

An account has been set up with your email jtest@test.com please set a password below. Password should be at least 10 characters long, with a mix of numbers and special characters.

☐ I accept the [Terms and Conditions](#) of use.

25

Password \* [Show](#)

- ! Must contain lowercase characters
- ! Must contain uppercase characters
- ! Must contain a number
- ! Must contain a special character
- ! Must be at least 10 characters long

26

Confirm Password \* [Show](#)

Back

Confirm

27