

**Part D**

**Check E-signatures**

**User Guide**

**Sunfire**

**January 2021**

**Draft v0.1**

## Part D Enrollment Process – Sunfire January 2021

**Audience:** Admins checking Part D Applications for e-signatures.

**Objective:** This is intended to be a quick guide to help understand how to check the Part D Application to see if the e-signature is complete successfully.

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## 2 Overview:

Senior Advisors is a brokerage focused on Medicare Supplements and Part D Prescription Drug Plans. When clients enroll in Medicare for the first time, we help them choose and enroll in their Part D Prescription Drug Plan. Each year during the Annual Enrollment Period (Oct 15 – Dec 7), we also review their Part D Plan and help them switch Part D Plans if there is another Part D Plan that would be more cost-effective.

This User Guide will provide the necessary steps to check the status of an e-signature on a Part D application.

**ESTIMATED COMPLETION TIME:** After the Admin is trained and “up to speed”, this total process to check an e-signature on a Part D Enrollment application should take only 3-5 minutes to complete.

**PROCESS TRIGGER:** The Trigger for this process is an email asking you to check the e-signature status. (There are also Dashboards in Zoho showing how many Part D e-signatures are outstanding to be completed.)

## 3 Search for the Application in Sunfire

The Trigger for this process is an email from your manager asking you to check the status of an e-signature for a Part D Drug Plan.

The email received should have the necessary information to find the application in Sunfire.

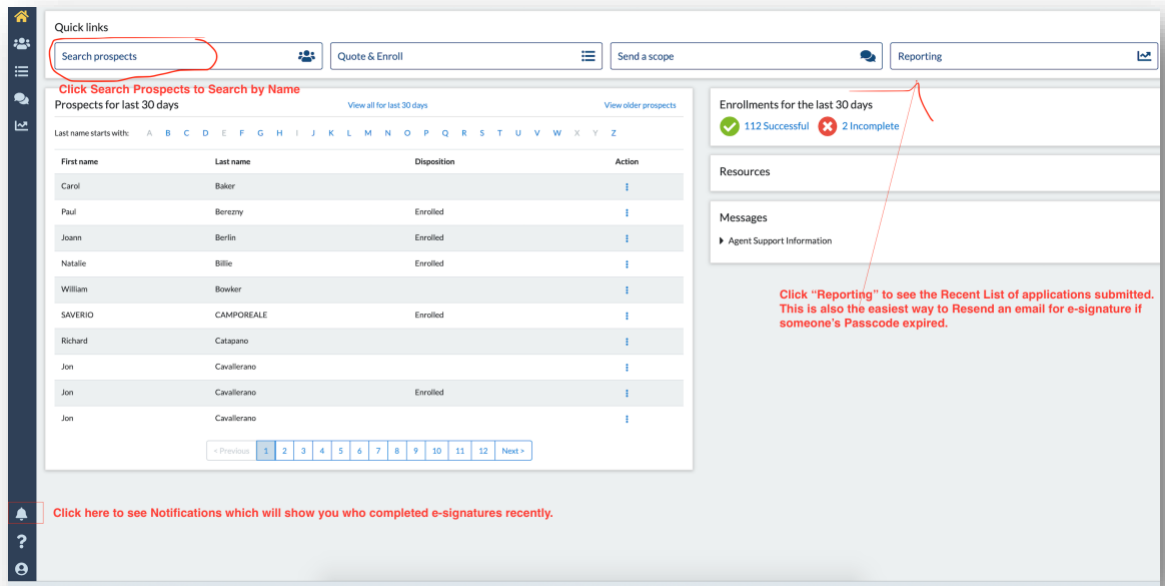
Login to Sunfire:

<https://www.sunfirematrix.com/app/agent>

Use the Sunfire Login credentials provided by your Manager.

### 3.1 Check e-signature status in Sunfire

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There are a few different ways you can check the e-signature status in Sunfire.

- **Search Prospects** – Click the Search Prospects button at the top of the screen to search for someone's application using their name. You can also click on the "Last Name Starts with: ..." to search based on the letter of the last name.
- **Notifications** – on the bottom left of the screen, there is a little Notification icon (bell). Click the bell to see recent notifications for individuals that have completed their e-signature.
- **Reporting** – click the Reporting Button on the top right to see the status of recent applications that were submitted. This is the best option to use if the e-signature is NOT yet complete.

If you have verified that the e-signature **is already complete**, update the Part D status in Zoho to:

- **Part D Application – e-signature Completed** (Lead Module) or
- **"603 – Rx Enrollment Complete – e-sign Complete"** (Part D Rx Module)
- 

If the e-signature is NOT complete, click on the **Reporting** button to find the application.

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Reporting Customer: Justin Lubenow Active Save

Report Type  
Enrollments Communications

Time frame Today

Enrollments  
1 enrollment  
Sort by Most recent

Enrollment code	First name	Last name	Carrier	Status	Date	Time	e-Signature Code	Action
08R3ZWOXBY	Justin	Lubenow	WellCare Health Plans, Inc.	<span style="color: red;">●</span>			500834	

- After you find the application in the Report section, click the three dots under “Action”.
- Select “Resend e-signature request”

who may use it to track beneficiary enrollment, for payment and other purposes applicable to Federal statutes that authorize the collection of this information (see Privacy Act Statement below).

Your response to this form is voluntary. However, failure to respond may affect enrollment in the plan.

The information on this enrollment form is correct to the best of my knowledge. I understand that if I intentionally provide false information on this form, I will be disenrolled from the plan.

☒ I acknowledge that I have read the above information and understand the contents of the application.

Select the scenario that describes who will be completing the application.\*

☒ Enrollee ☐ Authorized representative

### Sign and submit your application

☐ e-Signature (customer present)  
☐ Signature pad (customer present)  
☒ Send e-Signature request (customer on phone)

I will be on the phone with you the whole time to answer any questions that you might have.  
Would you like me to text or email the confirmation link to you now, so that you can finish enrolling in your plan?

Please select an Electronic Signature option:

☐ Text Message  
☒ Email

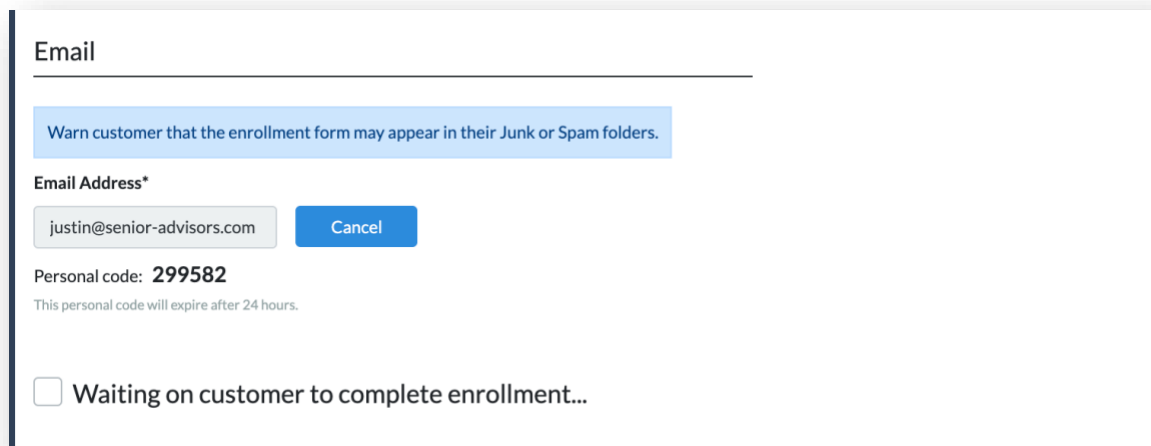
### Email

Warn customer that the enrollment form may appear in their Junk or Spam folders.

Email Address\*  
justin@senior-advisors.com Send Email

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- Scroll down to the bottom and click “**Send Email**”. (If you need to change the email address you can do so here, before clicking Send Email.





The screenshot shows a web form titled "Email". Below the title is a blue warning box that says "Warn customer that the enrollment form may appear in their Junk or Spam folders." Underneath is the "Email Address\*" field with the text "justin@senior-advisors.com" and a blue "Cancel" button. Below that is the "Personal code: 299582" with a note "This personal code will expire after 24 hours." At the bottom is a checkbox labeled "Waiting on customer to complete enrollment..." which is currently unchecked.

A new passcode (e.g. **299582**) will be created/provided in Sunfire.

### 3.2 Update Sunfire Passcode in Zoho

- Find the Record in Zoho (Lead or Part D Module)
- Enter the new Sunfire Passcode in Sunfire code field and **Save**.

Sunfire Personal Code   

Refresh the browser and check the Emails at the bottom of the record in Zoho to confirm the new Email was sent to the client with the new Passcode.

