Viva Health
Agent Portal User Guide

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Document Updates

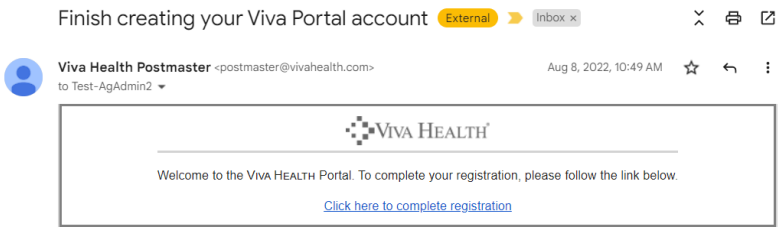
Date	Updates
10/19/2022	Format update. All sections updated with new screen shots and instruction verbiage updated.
9/19/2023	Updated to include Agent Material Ordering System

User Registration, Login, and Password Help

Initial Registration

When a new user is added to the Admin Portal, they will receive a Welcome Email that contains a link for registration. A user cannot log into any portal until the registration process has been completed. If a user has access to multiple portals, registration is only required once to give access to all portals.

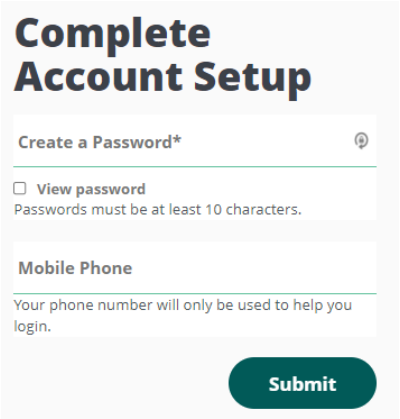
- The email will be from Viva Health Postmaster with a subject of “Finish creating your Viva Portal account”



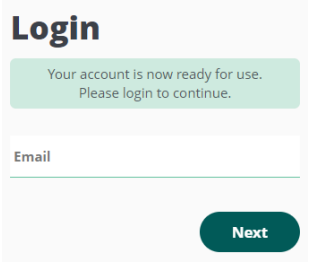
- Click the link in the email

- Create a strong password (if the password is not strong enough an error message will display prompting for a different password)

- There is an option to entire a mobile phone number at this stage as well. This is helpful for Multifactor Authentication (MFA), so that the code can be sent to the mobile number on file, but it is not required.

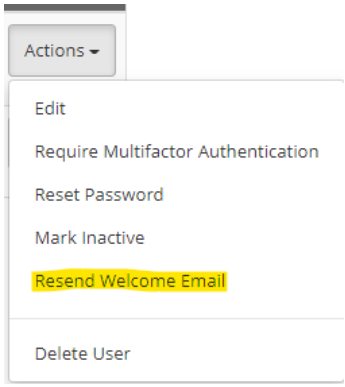


- Click *SUBMIT* and the screen will refresh with a message stating the account is ready to be used and display the initial login screen.



Troubleshooting Registration

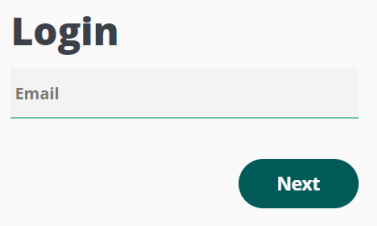
- If the registration email does not appear in the users inbox
  - User should check spam and trash folders
  - Verify the email address in Admin Portal for that user is correct
  - The Administrator can resend the welcome email by going to the user's profile in Admin Portal and clicking *RESEND WELCOME EMAIL*. (This option is only available if the user has not completed the registration process. Once the registration process is complete, this option will not appear for that user.)



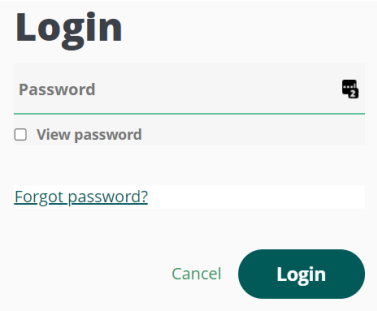
Login Process

Login is required for each portal individually. If a user is logged into Agent Portal and needs to access Admin Portal, they will need to go through the login process again.

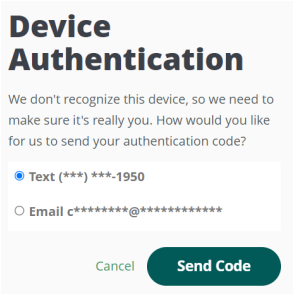
- Go to the correct portal login page
  - https://www.vivahealth.com/Portal/Admin
  - https://www.vivahealth.com/Portal/Agent
- Enter the email address and click *NEXT*



- Enter the password and click *LOGIN*
  - Check mark "View Password" will allow the user to see what they are typing vs only a dot showing for each character entered.
  - Forgot Password negates the existing password and triggers an email with a link to create a new password.
  - Cancel will take the user back to the first Login screen.

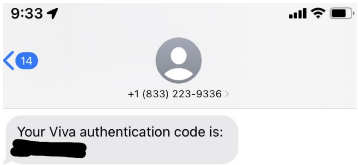


- Receive the Multifactor Authentication (MFA) code
  - If there is a mobile phone number on file, the user will be provided a choice to receive their code via email or via text.
  - Select the best option and click *SEND CODE*
  - If there is not a mobile phone number on file, an email with the code will be sent automatically.

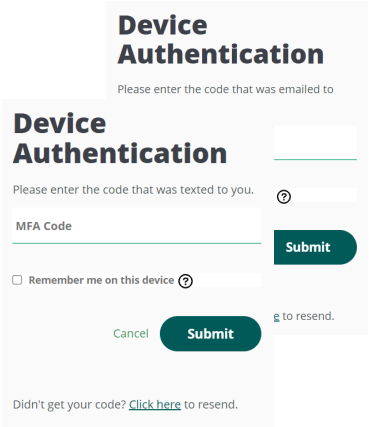


Example of the email

Example of the text message



- The next screen will display a field to enter the MFA code
  - Enter the code and click *SUBMIT*



Additional Options on this screen

- **Remember me on this device:** This allows the program to remember the device was authenticated for a set number of days (See Security Settings for details); and therefore will not require the authentication process to occur a login during that time.
- **Cancel:** Cancels the login and takes the user back to the initial login screen.
- **Click Here to resend**: sends a new MFA code via the selected method.

Login and Password Issues/Troubleshooting

Possible issues that may occur during login.

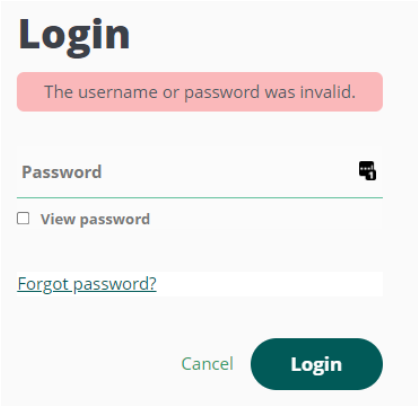
- Login fail
- Forgot password
- Locked out of account (after too many incorrect login attempts)
- Not receiving MFA code

Login Fail

A login attempt can fail if the username (email address) OR password are entered incorrectly. For security reasons, the error message will not display which credential was incorrect.

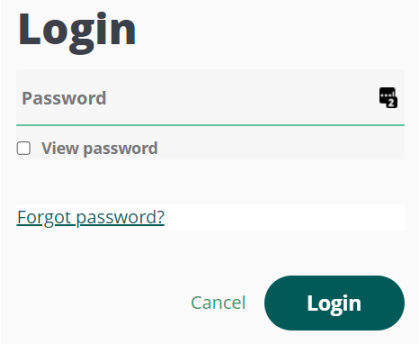
The user has two options

1. Enter the password again on the screen that appears
2. Click *CANCEL* and go back to the initial login screen to enter the email address again. ***This is the recommended option***



Forgot Password

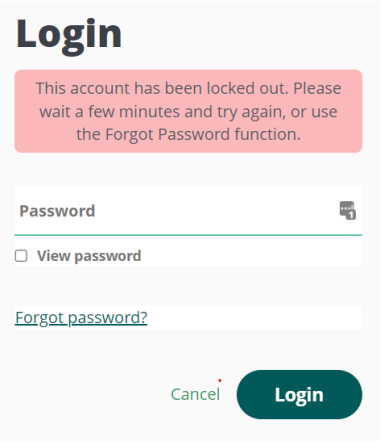
In the event the user has forgotten their password and needs to reset it, the ***recommended solution*** is for the user to click *FORGOT PASSWORD* on the login screen.



An email will be sent with a link to create a new password.

Follow the link and create a new password and then login.

User is Locked Out



Too many incorrect login attempts will lock an account. The maximum number of login attempts is outlined in Security Settings.

The user will receive an error message on the password screen if they are locked out.

The User has 2 options to unlock their account.

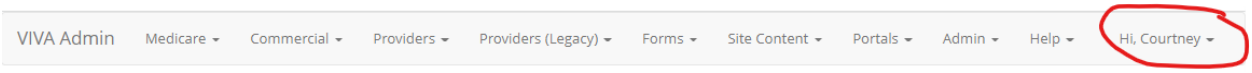
1. Wait the allotted amount of time for the account to systematically unlock.
2. Contact an Administrator to unlock the account.

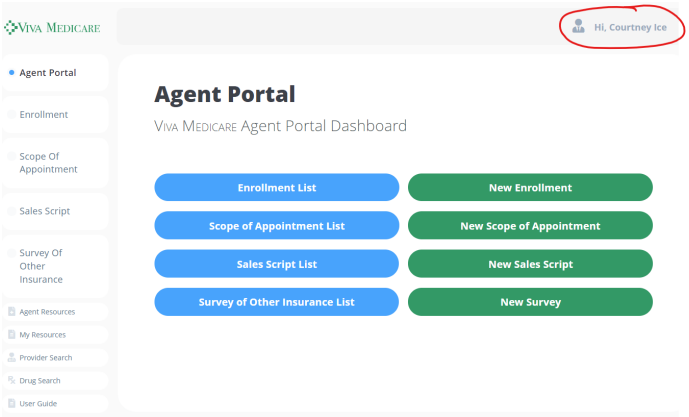
Once the account is unlocked the User will be able to login using their previous password OR, go through the Forgot Password workflow to create a new password.

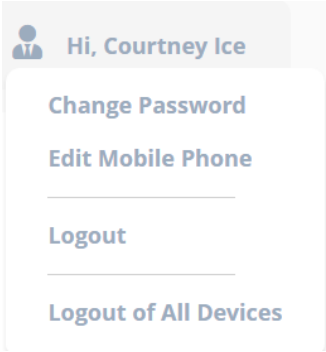
User Profile

In both Agent Portal and Admin Portal have a user profile where the user can manage selection options of their account.

The top right corner of both portals there will be the user's name. Clicking on the name will display a dropdown menu of profile options.



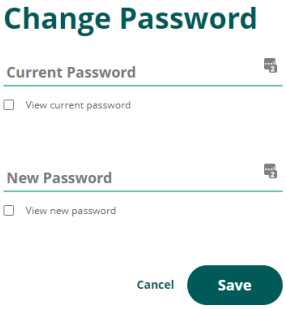




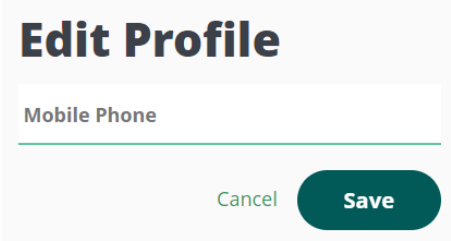
Change Password

A user can change their password while logged into a portal by clicking *Change Password* in the Profile menu. There will be a prompt to enter the current password, and then the new password, and click *Save*.

If a password change is not desired, click *Cancel* to close the window without any changes.



Edit Mobile Phone



If a mobile phone number was not provided at registration OR there needs to be a change in that number, a user can make that update by clicking *Edit* Mobile Phone. A box will appear, where the number can be added or changed. Click *Save* to save the number. Click *Cancel* to go back to the dashboard without making any changes.

Logout/Logout of All Devices

To logout of a portal, click Logout from the profile menu.

To logout of a portal in all devices that may be logged in, click Logout of All Devices from the profile menu.

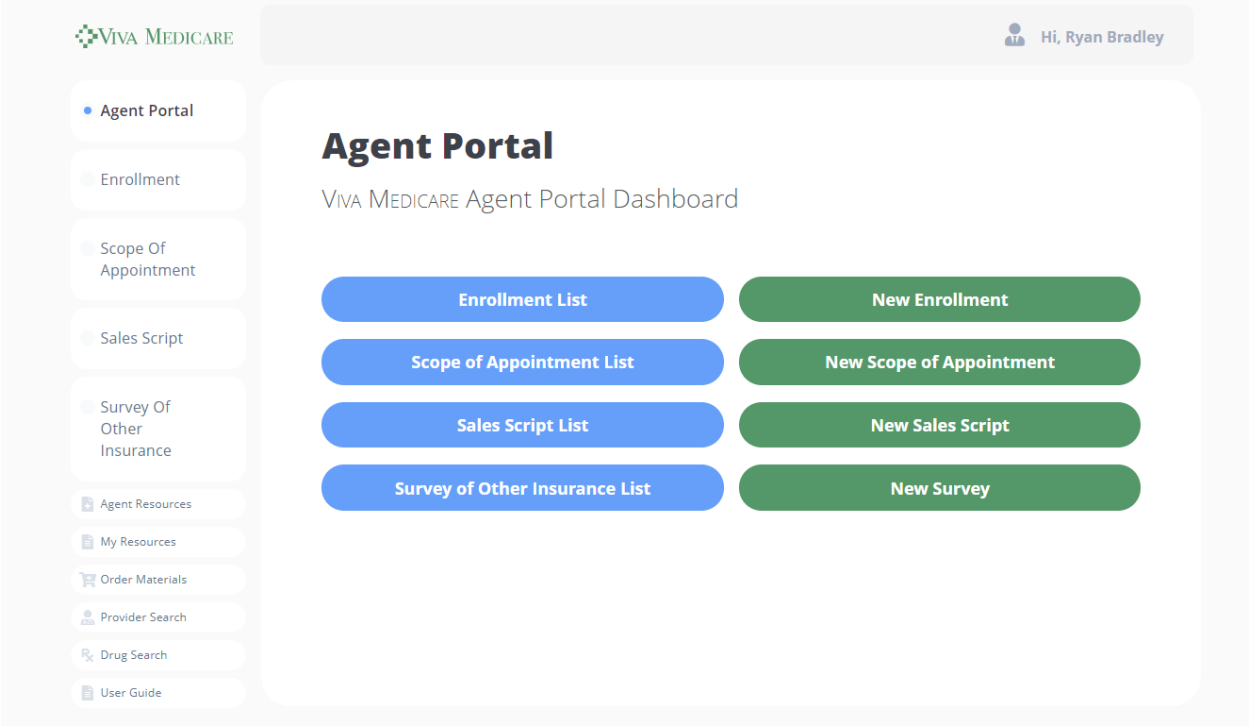
- Please Note: Logout of All Devices will also cause all devices to “forget” the MFA code. At the next log in, MFA verification will be required.

Agent Portal Dashboard

Upon log in to the Agent Portal a user will see the dashboard. From this page an agent can access historical enrollments and forms, open new enrollments and forms to complete and submit, access their personal resources as well as communal resources, and view and update their personal profile information.

An agent can return to this dashboard view at any time by clicking “Agent Portal” in the left hand navigation bar.

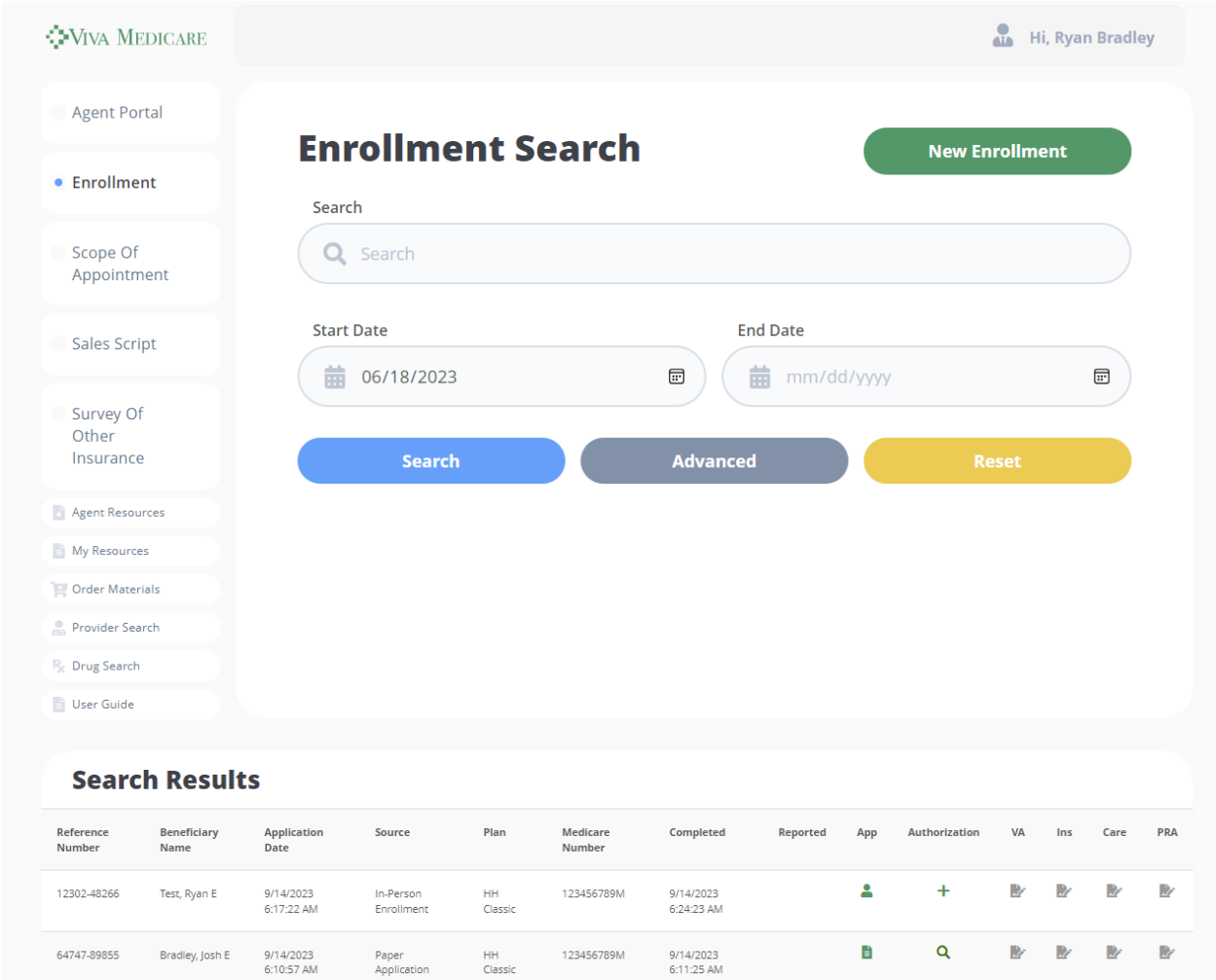
The left hand navigation bar remains accessible until a user opens a new enrollment or form to complete for the member.



Enrollment

Enrollment Search

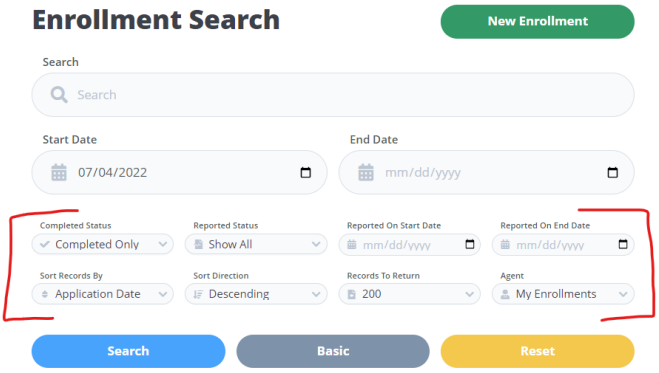
Clicking on *Enrollment* from the left hand navigation bar or *Enrollment List* from the dashboard will open the Enrollment Search page.



On this page a user can search for a specific enrollment or start a new enrollment

Filtering and Searching Enrollments

The page initially opens with the basic search options, for additional search fields click *Advanced.*



Enter search parameters and click *Search* to display results. NOTE: you must click Search, hitting Enter does not submit the search results

To remove any search parameters entered and return to the basic view and filters, click *Reset*.

Search Fields

Basic

- Search
  - Use this field to search for specific applications
  - Text box. Default is blanks. Type in enrollment form information
- Start Date/End Date
  - Use these fields to enter a date range for completed applications
  - Date field. Manually type in a date or use the calendar option to choose a date.
  - Start Date default is 3 months retro from current date.
  - End Date default is blank

Advanced

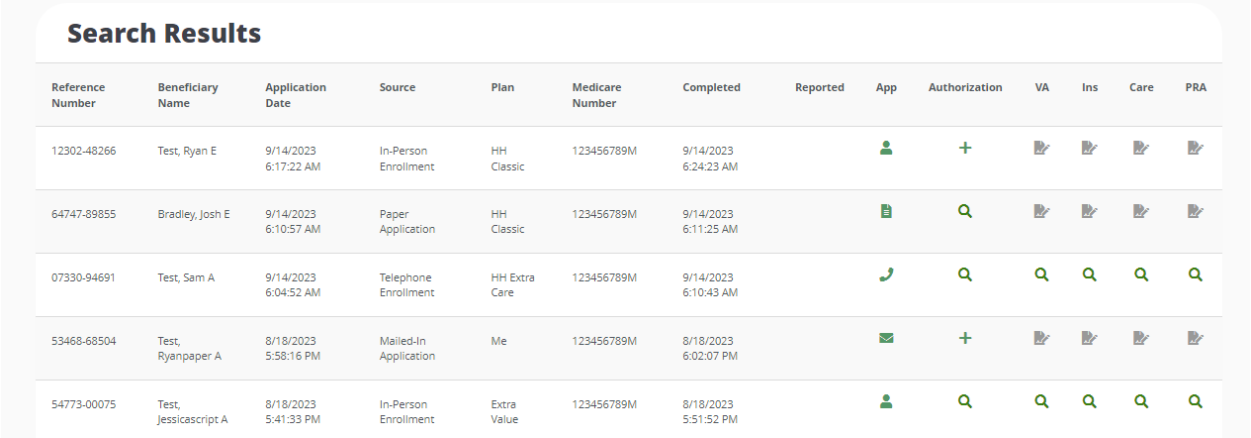
- Complete Status
  - Use this field to filter the results list by completed status
  - Dropdown menu. Default is Complete Only. Choose to see only complete, only incomplete, or all enrollments
  - Incomplete applications are those that have been started but not submitted. After 4 hours, incomplete applications will no longer be available to complete or submit.
- Reported Status
  - Use this field to filter the results list by reported status.
  - Reported indicates the application has been passed to Viva via the electronic file feed.

    - Dropdown menu. Default is Reported Only. Choose to see only reported, only unreported, or all enrollments
- Reported On Start/End Date
    - Use these fields to enter a date range for reported applications
    - Date field. Manually type in a date or use the calendar option to choose a date.
    - Default is blank for both start and end dates.
- Sort Records By
    - Use this field to sort the results list by a chosen field.
    - Dropdown menu. Default is blank. Choose the search result field that the results should be sorted by.
- Sort Direction
    - Use this field to choose the direction the results should be displayed.
    - Dropdown menu. Default is Descending. Choose from Ascending and Descending.
- Records to Return.
    - Use this field to choose the maximum number of results to display in the result list.
    - Dropdown menu. Default is 200. Choose the number of records to show on the results page at a time.
- Agent
    - This option is only available to users with a User Type of Agent Administrator or System Administrator.
    - Use this option to view enrollments by a particular agent.
    - Dropdown menu. Default is My Enrollments. Choose an agent's name to view their enrollments.

Viewing Enrollments

The Enrollment List and search results provides basic applicant and enrollment information at a glance as well as information about the status of the application and if there are any other forms associated with that application.

Please Note: Application reference numbers, last names, and Medicare numbers have been blacked out for PHI/HiPPA purposes. Those data elements will be visible on the search results.



Search Results

Reference Number	Beneficiary Name	Application Date	Source	Plan	Medicare Number	Completed	Reported	App	Authorization	VA	Ins	Care	PRA
12302-48266	Test, Ryan E	9/14/2023 6:17:22 AM	In-Person Enrollment	HH Classic	123456789M	9/14/2023 6:24:23 AM							
64747-89855	Bradley, Josh E	9/14/2023 6:10:57 AM	Paper Application	HH Classic	123456789M	9/14/2023 6:11:25 AM							
07330-94691	Test, Sam A	9/14/2023 6:04:52 AM	Telephone Enrollment	HH Extra Care	123456789M	9/14/2023 6:10:43 AM							
53468-68504	Test, Ryanpaper A	8/18/2023 5:58:16 PM	Mailed-In Application	Me	123456789M	8/18/2023 6:02:07 PM							
54773-00075	Test, Jessicascript A	8/18/2023 5:41:33 PM	In-Person Enrollment	Extra Value	123456789M	8/18/2023 5:51:52 PM							

This search results will show the following information:

Reference Number	Number provided when the enrollment application is completed
Beneficiary Name	Full name provided on the application
Application Date	Date and time the application was started
Source	Source of the application
Plan	The plan selected on the application
Medicare Number	Medicare number (MBI) provided on the application
Completed	Date and time stamp application was electronically completed
Reported	A check mark indicates it has been reported Viva. No check mark means it has not been reported to Viva
App	The icon displayed represents the application source. The application source also displays when hovering the cursor over the icon. Telephone Mail-In In-Person Paper Clicking on the icon will open the PDF of the application.
Authorization	Sales Script PDF/link. Magnifying glass icon indicates that there is a sales script linked. Plus icon can be used to link a sales script to an application. (See Sales Scripts for more information).

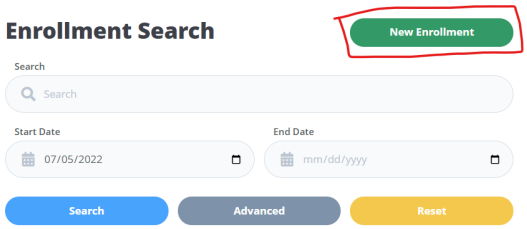
Supplemental Forms	Supplemental forms can be filled out at the time of the enrollment or after the enrollment and linked. For all supplemental forms, the magnifying glass icon indicates there is a completed form linked to the enrollment. Clicking the icon will open the PDF. The gray document icon indicates there is no form. Clicking the icon will open the electronic form to allow for it to be completed.
VA	Veterans Affair Release Request Form
INS	Survey of Other Insurance Form
Care	Care Transition Form
PRA	Personal Representative Appointment Form

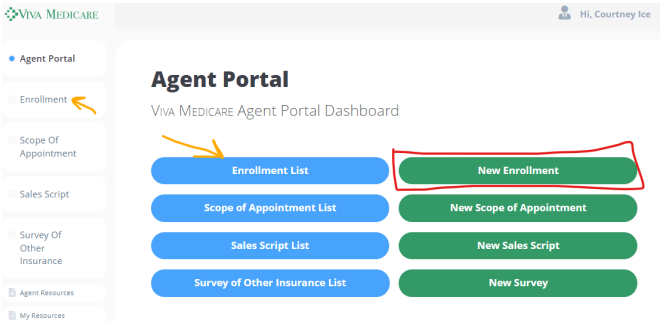
Creating a New Enrollment

Open a blank enrollment by clicking *New Enrollment* on the Agent Portal Dashboard

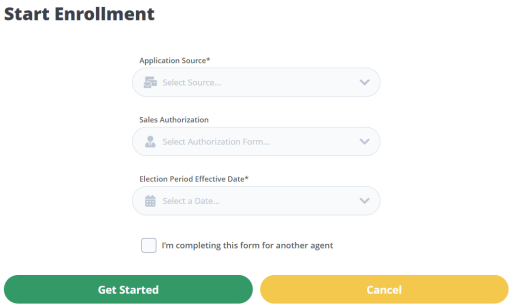
OR

Open the Enrollment Search and click *New Enrollment*

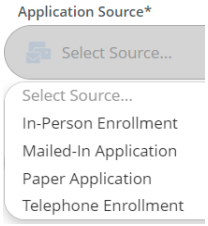




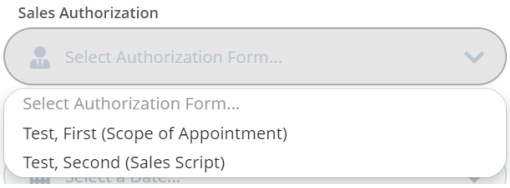
To start the enrollment, populate the fields on the Start screen.



- Application Source (required) Choose the source.

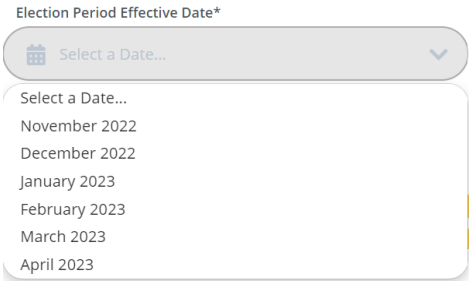


- Attach a Sales Authorization
  The drop down menu will display the list of previously completed scope of appointments and sales scripts.
  If there is no authorization form, the field can be left blank.

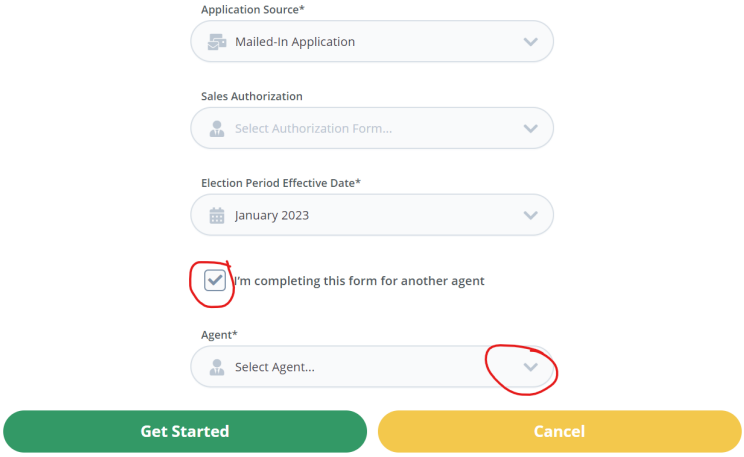


  Attaching a Sales Authorization will bring any member information from the Scope or Sales Script and pre-populate it into the application.

- Election Period Effective Date (required)
  The drop down menu will display a list of start dates, that are 6 months in advance of the current date.



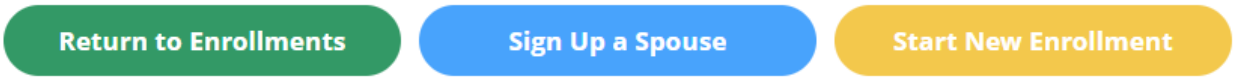
- If you are completing the application for another agent check the box “I’m completing this form for another agent”.
  An additional dropdown field will appear, choose the name of the agent that it is being completed for.



- Click *Get Started* to open the enrollment form
  - ➢ The Application Source and the Effect Date will determine which electronic form is opened

- To not move forward with the application and go back to the Agent Dashboard, click *Cancel*. Two options will be presented
  - ➢ Save Application will store it as an Incomplete application (please note this will only be stored for 4 hours, after that time it will be deleted)
  - ➢ Delete Application will completely delete the application and it will not be stored or retrievable. To choose this option a user must click the box that states they understand it cannot be undone.

- At the end of the enrollment there will be three options



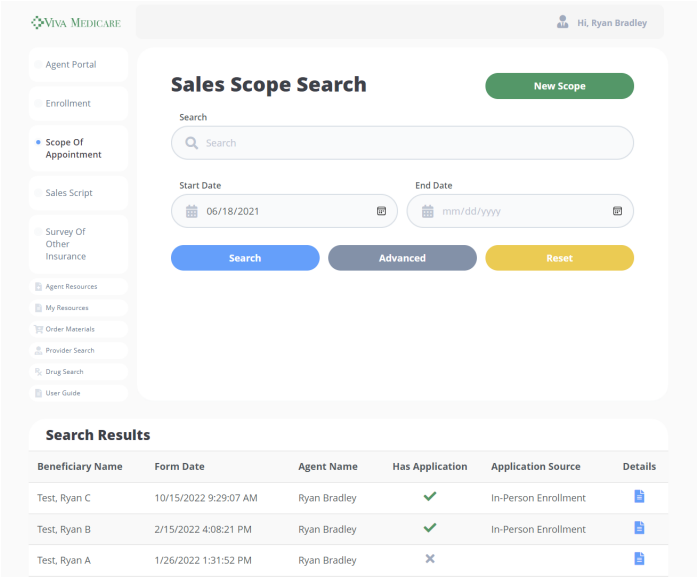
  - Return to Enrollments - takes you back to the Enrollment List
  - Sign Up a Spouse - opens a new enrollment form with Home Phone Number and Permanent address prepopulated
  - Start a New Enrollment - opens a new, blank enrollment form

Any questions or specific information needed around how to complete a Medicare Enrollment Application should be directed to a designated Viva associate.

Scope of Appointment

Scope of Appointment Search

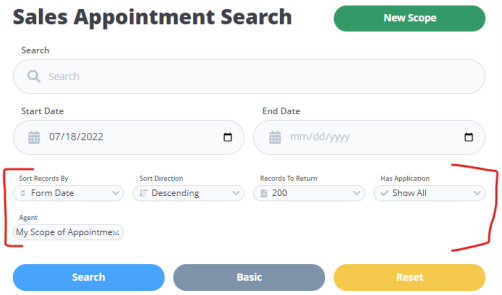
Click Scope of Appointment from the left hand navigation or Scope of Appointment List from the dashboard.



On this page a user can search for a specific scope of appointment or start a new one.

Filtering and Searching Scope of Appointments

The page initially opens with the basic search options, for additional search fields click *Advanced.*



Enter search parameters and click *Search* to display results. NOTE: you must click Search, hitting Enter does not submit the search results

To remove any search parameters entered and return to the basic view and filters, click *Reset*.

Search Fields

Basic

- Search
  - Use this field to search for specific scopes
  - Text box. Default is blanks. Type in scope form information
- Start Date/End Date
  - Use these fields to enter a date range for completed scopes
  - Date field. Manually type in a date or use the calendar option to choose a date.
  - Start Date default is 3 months retro from current date.
  - End Date default is blank

Advanced

- Sort Records By
  - Use this field to sort the results list by a chosen field.
  - Dropdown menu. Default is blank. Choose the search result field that the results should be sorted by.
- Sort Direction
  - Use this field to choose the direction the results should be displayed.
  - Dropdown menu. Default is Descending. Choose from Ascending and Descending.
- Records to Return.
  - Use this field to choose the maximum number of results to display in the result list.
  - Dropdown menu. Default is 200. Choose the number of records to show on the results page at a time.
- Has Application
  - Use this field to filter results based on if there is an application attached to the scope.
  - Dropdown menu. Default is Show All. Choose from Show All, Yes, and No.
- Agent
  - This option is only available to users with a User Type of Agent Administrator or System Administrator.
  - Use this option to view scopes by a particular agent.
  - Dropdown menu. Default is My Scope of Appointments. Choose an agent's name to view their enrollments.

Viewing Scope of Appointments

The search results list provides basic scope information at a glance.

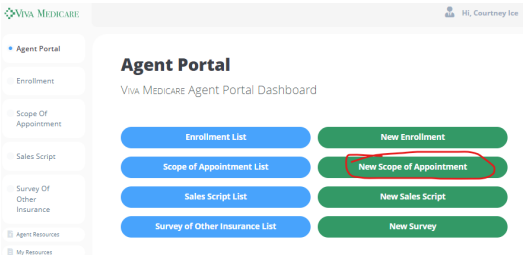
- Beneficiary Name
- Form Date - the date and time the form was completed
- Agent Name that completed the form
- Has Application - If there is an application associated with the scope of appointment there will be a green check mark. The grey X indicates there is not an application attached to the scope
- Application Source
- Details - click on the blue paper icon for a PDF of the scope to open in a new tab.

Search Results

Beneficiary Name	Form Date	Agent Name	Has Application	Application Source	Details
test, henry	10/18/2022 10:04:52 AM	Courtney Ice	✕		
test, betty	10/18/2022 10:03:09 AM	Courtney Ice	✓	In-Person Enrollment	
test, jimmy	10/18/2022 9:59:36 AM	Courtney Ice	✕		
test, susie	10/18/2022 9:58:28 AM	Courtney Ice	✕		
test, courtney	10/18/2022 9:34:58 AM	Courtney Ice	✕		

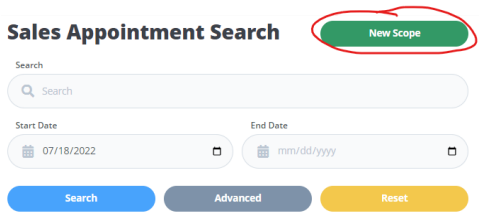
Creating a New Scope of Appointment

Open a new scope of appointment form from the dashboard by clicking *New Scope of Appointment*



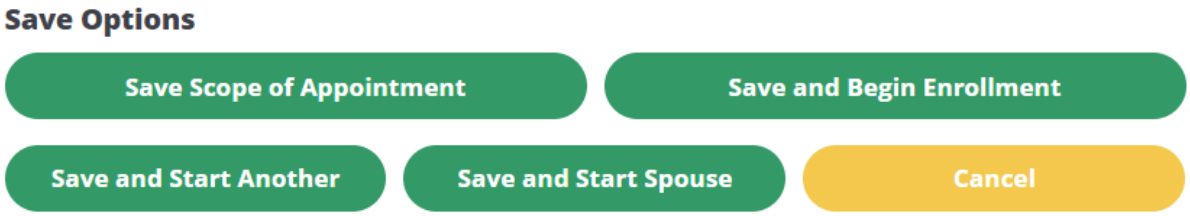
OR

Open the Scope Appointment Search and click *New Scope*

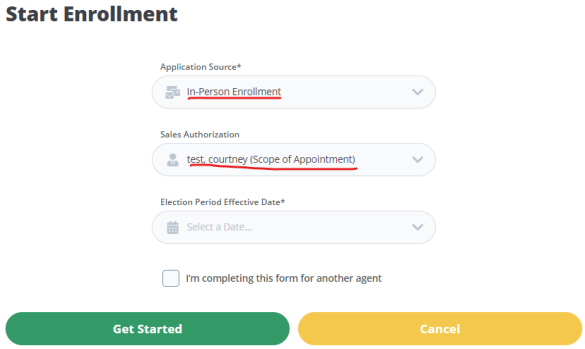


Finishing a Scope of Appointment

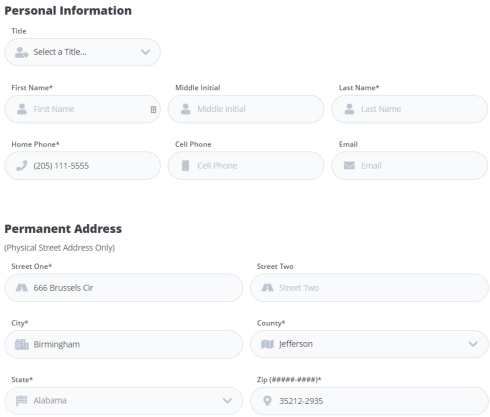
There are five options at the end of a Scope of Appointment Form



- Save Scope of Appointment
  - This will save the scope and take you back to Scope Search List
- Save and Begin Enrollment
  - This option will open the Enrollment Start screen and the Application source and Sales Authorization will be prepopulated.
  - Any member information in the Scope will be prepopulated into the application.



- Save and Start Another
  - This option saves the form and opens a new, completely blank form.
- Save and Start Spouse
  - This option saves the form and opens a new form with home phone number and permanent address prepopulated. (Cell phone number and email address do not carry over)

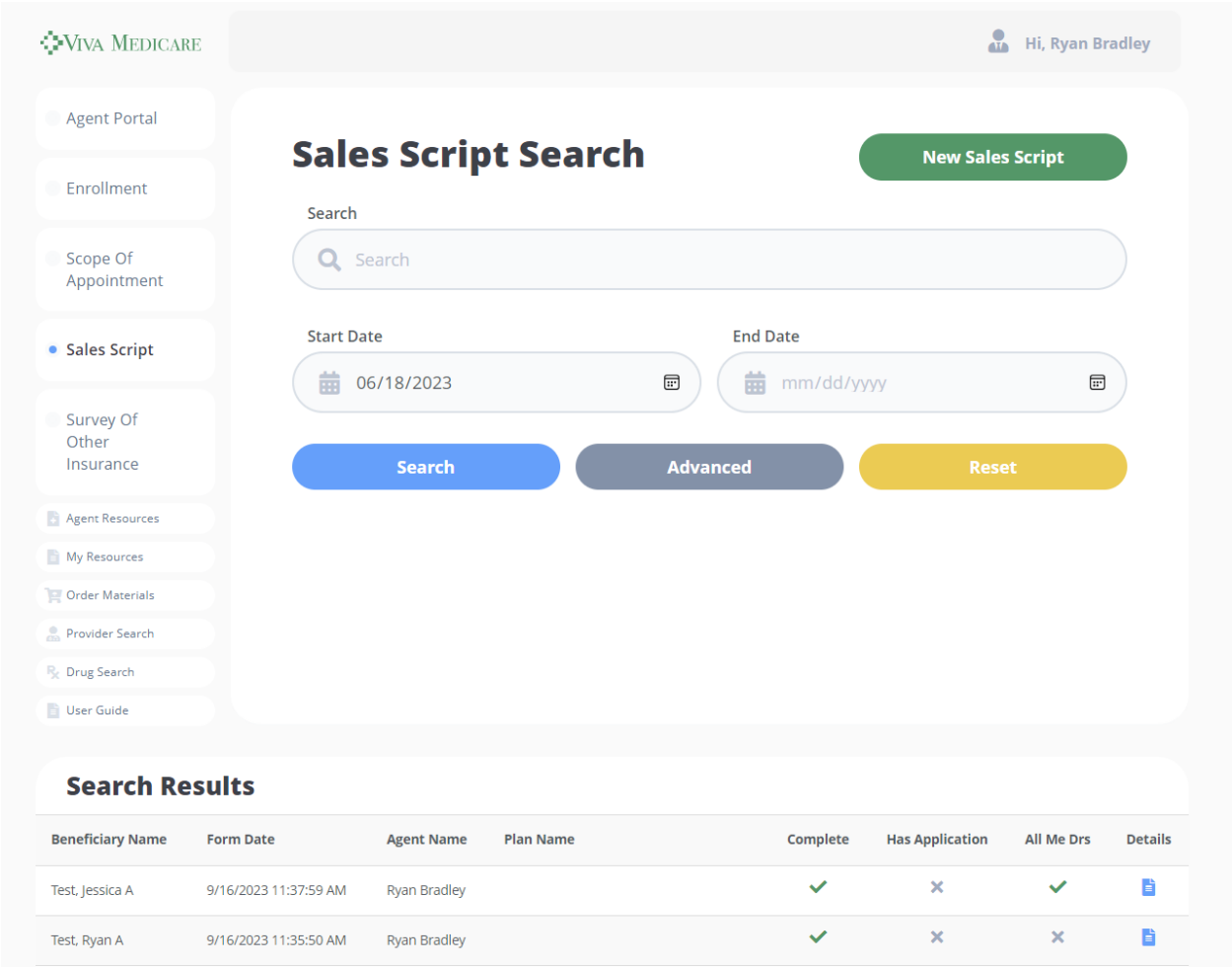


- Cancel
  - Leaves the scope without saving any data.

Sales Script

Sales Script Search

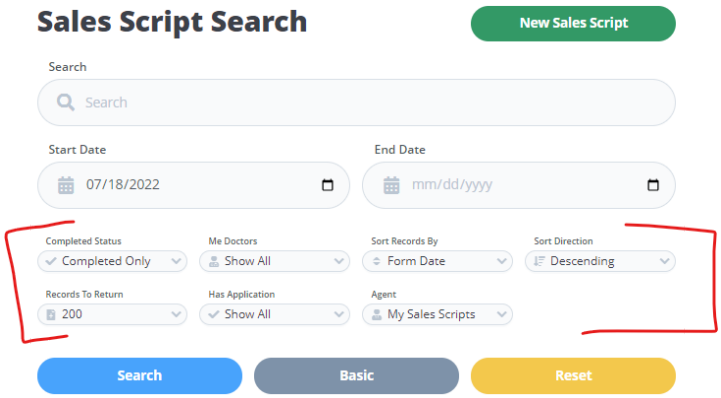
Click Sales Script from the left hand navigation or Sales Script List from the dashboard.



On this page a user can search for a specific script or start a new one.

Filtering and Searching Sales Scripts

The page initially opens with the basic search options, for additional search fields click *Advanced.*



Enter search parameters and click *Search* to display results. NOTE: you must click Search, hitting Enter does not submit the search results

To remove any search parameters entered and return to the basic view and filters, click *Reset*.

Search Fields

Basic

- Search
  - Use this field to search for specific scripts
  - Text box. Default is blanks. Type in script information
- Start Date/End Date
  - Use these fields to enter a date range for completed scripts
  - Date field. Manually type in a date or use the calendar option to choose a date.
  - Start Date default is 3 months retro from current date.
  - End Date default is blank

Advanced

- Completed Status
- Me Doctors
  - Use this field to filter the results list by scripts that have selected that All Doctors are in the Me network.
  - Dropdown menu. Default is Show All. Choose from Show All, Yes, No.
- Sort Records By
  - Use this field to sort the results list by a chosen field.
  - Dropdown menu. Default is Form Date. Choose the search result field that the results should be sorted by.
- Sort Direction
  - Use this field to choose the direction the results should be displayed.

    - Dropdown menu. Default is Descending. Choose from Ascending and Descending.
- Records to Return.
    - Use this field to choose the maximum number of results to display in the result list.
    - Dropdown menu. Default is 200. Choose the number of records to show on the results page at a time.
- Has Application
    - Use this field to filter results based on if there is an application attached to the script.
    - Dropdown menu. Default is Show All. Choose from Show All, Yes, and No.

- Agent
    - This option is only available to users with a User Type of Agent Administrator or System Administrator.
    - Use this option to view scripts by a particular agent.
    - Dropdown menu. Default is My Sales Scripts. Choose an agent's name to view their scripts.

Viewing Sales Scripts

The search results list provides basic scope information at a glance.

- Beneficiary Name
- Form Date - the date and time the form was completed
- Agent Name that completed the form
- Has Application - If there is an application associated with the script there will be a green check mark. The grey X indicates there is not an application attached to the script.
- All Me Drs - If the member indicated that their doctors are in the Me Network a green check will be present.
- Details - click on the blue paper icon for a PDF of the script to open in a new tab.

Search Results

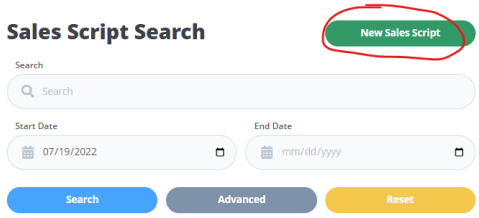
Beneficiary Name	Form Date	Agent Name	Plan Name	Complete	Has Application	All Me Drs	Details
test, lulu	10/18/2022 11:12:44 AM	Courtney Ice	VIVA Medicare Extra Value	✓	✓	✓	
Test, Sally	8/8/2022 9:14:36 PM	Courtney Ice		✓	✗	✗	

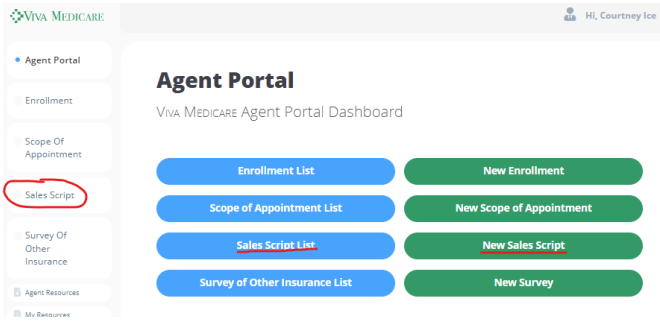
Creating a New Sales Script

Open a new sales script form from the dashboard by clicking *New Sales Script*

OR

Open the Sales Script Search and click *New Sales Script*

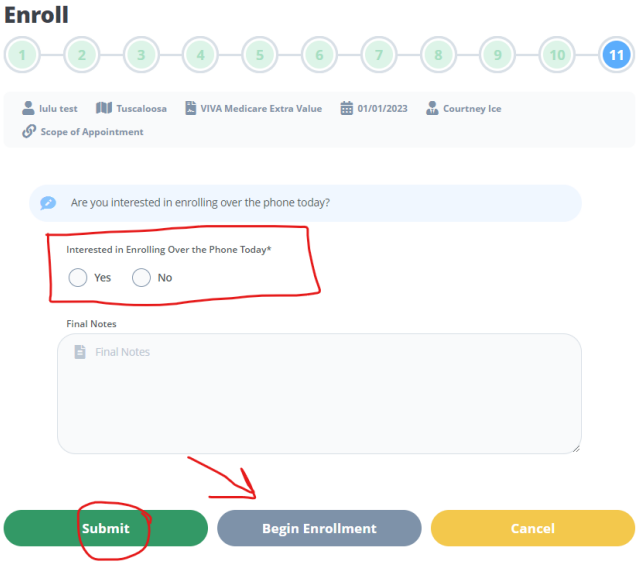


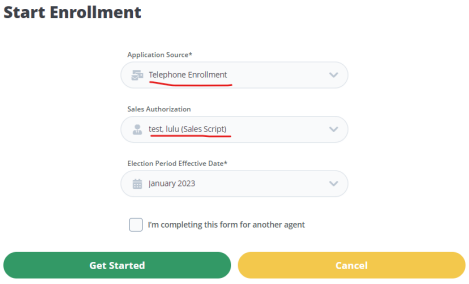


Finishing a Sales Script

Prior to submitting/saving the script you must indicate if the member is interested in enrolling over the phone today.

- ❖ Submit
  - ➢ Saves the script





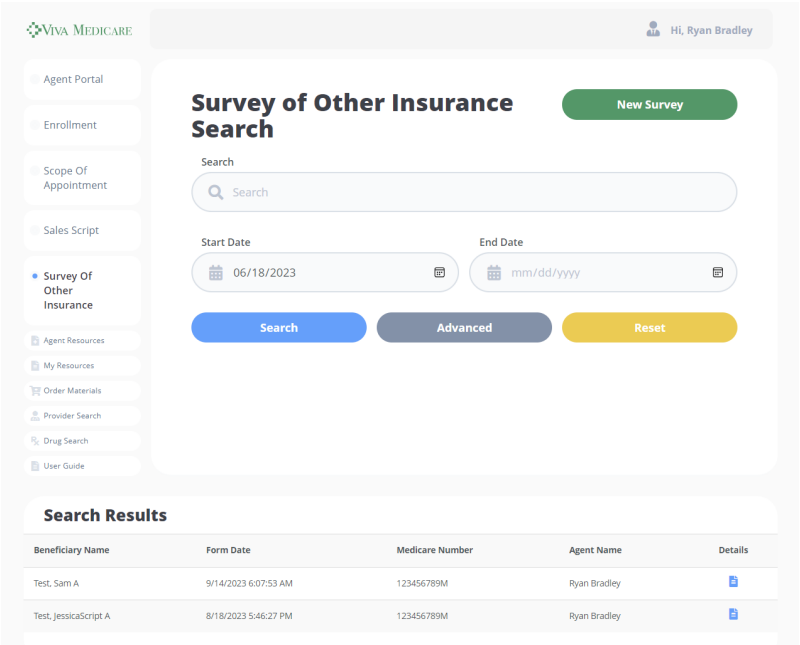
- ❖ Begin Enrollment
  - ➢ Saves the script and opens a new enrollment. On the Enrollment Start page the Application Source and Sales Authorization are prepopulated. In the application form any information taken during the Sales Script will also prepopulate.

- Cancel
  - Canceling a script will close the form and no data will be saved.

Survey of Other Insurance

Survey of Other Insurance Search

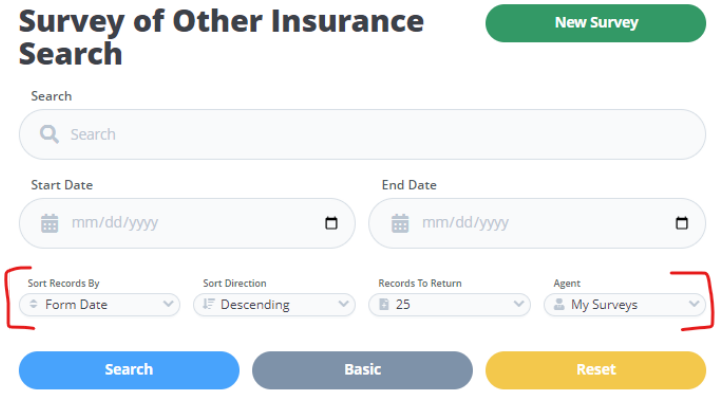
Click Survey of Other Insurance from the left hand navigation or Survey of Other Insurance List from the dashboard.



On this page a user can search for a specific survey or start a new one.

Filtering and Searching Survey of Other Insurance

The page initially opens with the basic search options, for additional search fields click *Advanced.*



Enter search parameters and click *Search* to display results. NOTE: you must click Search, hitting Enter does not submit the search results

To remove any search parameters entered and return to the basic view and filters, click *Reset*.

Search Fields

Basic

- Search
  - Use this field to search for specific scripts
  - Text box. Default is blanks. Type in script information
- Start Date/End Date
  - Use these fields to enter a date range for completed surveys
  - Date field. Manually type in a date or use the calendar option to choose a date.
  - Start Date default is 3 months retro from current date.
  - End Date default is blank

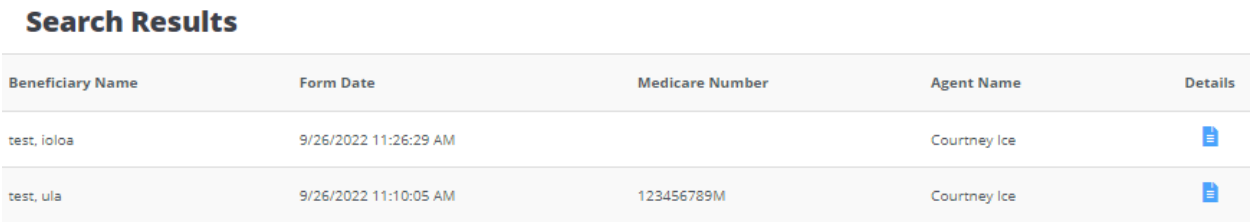
Advanced

- Sort Records By
  - Use this field to sort the results list by a chosen field.
  - Dropdown menu. Default is Form Date. Choose the search result field that the results should be sorted by.
- Sort Direction
  - Use this field to choose the direction the results should be displayed.
  - Dropdown menu. Default is Descending. Choose from Ascending and Descending.
- Records to Return.
  - Use this field to choose the maximum number of results to display in the result list.
  - Dropdown menu. Default is 25. Choose the number of records to show on the results page at a time.
- Agent
  - This option is only available to users with a User Type of Agent Administrator or System Administrator.
  - Use this option to view scripts by a particular agent.
  - Dropdown menu. Default is My Surveys. Choose an agent's name to view their surveys.

Viewing Survey of Other Insurances

The search results list provides basic scope information at a glance.

- Beneficiary Name
- Form Date - the date and time the form was completed
- Medicare Number
- Agent Name that completed the form
- Details - click on the blue paper icon for a PDF of the survey to open in a new tab.



Search Results

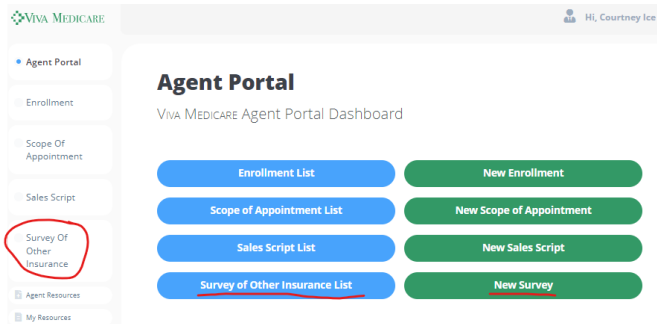
Beneficiary Name	Form Date	Medicare Number	Agent Name	Details
test, ioloa	9/26/2022 11:26:29 AM		Courtney Ice	
test, ula	9/26/2022 11:10:05 AM	123456789M	Courtney Ice	

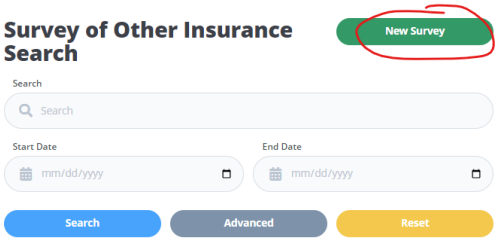
Creating a New Survey of Other Insurance

Open a new Survey of Other Insurance form from the dashboard by clicking *New Survey.*

OR

Open the Survey of Other Insurance Search and click *New Survey.*



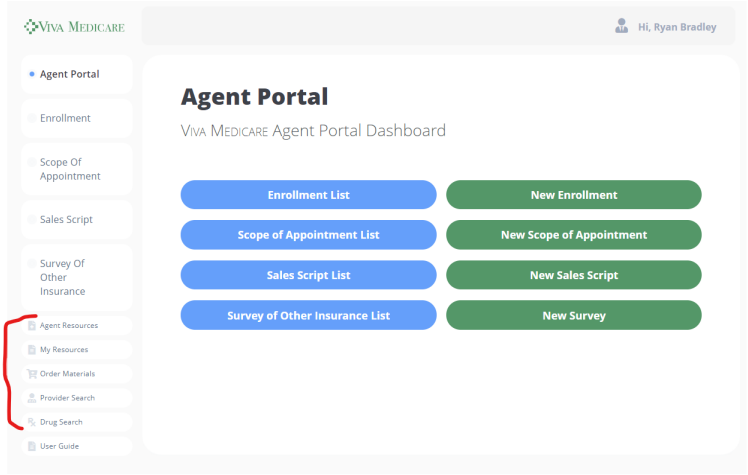


Finishing a Survey of Other Insurance

- Submit Survey will save the survey data.
- Cancel exists the survey and does not save any data.

Resources

Resources are available to agents and users on the Agent Portal They are available from the left hand navigation panel.



Agent Resources

The following resources are updated from the Admin Portal and are available for all Agents.

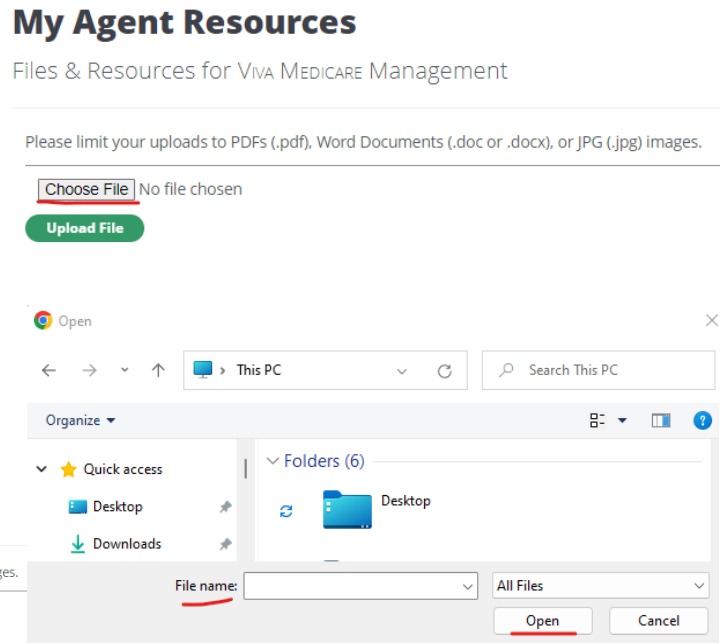
- Plan Documents
- Marketing Materials
- Forms
- Reference Documents
- Helpful Weblinks

My Resources

Agents and users are able to load their own resources in this section. Files uploaded here are viewable to the Agent on the Agent Portal and to Agent Administrators and System Administrators in the Admin Portal.

To upload a document

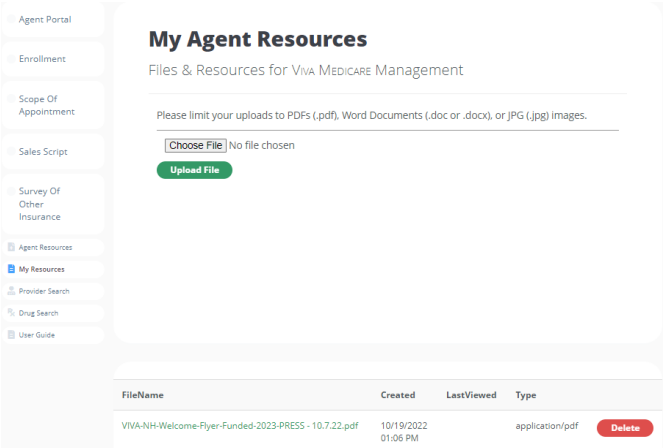
- ❖ click *Choose File*
- ❖ Select the file from it's location and click *Open*
- ❖ The file name will display on the My Agent Resources page, click *Upload File* to complete the process



Notice that the document is now displayed on the bottom portion of the My Agent Resources page.

To open the document click on the document name.

To delete the document click *Delete*

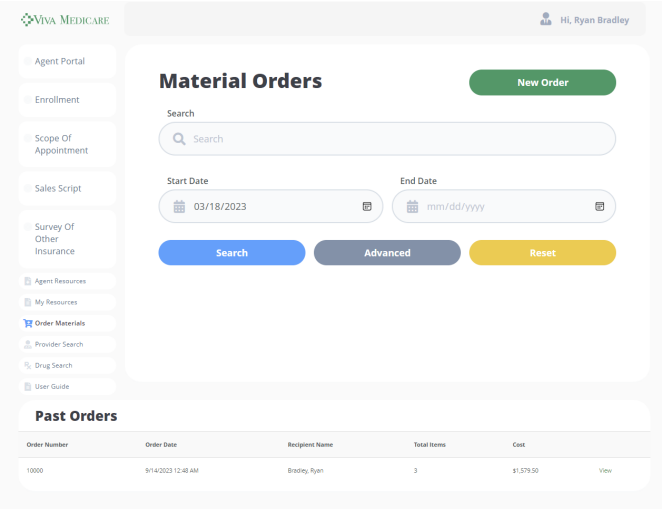


Order Materials

When available, Agents are able to order materials from Viva-affiliated print vendors from the Agent Portal.

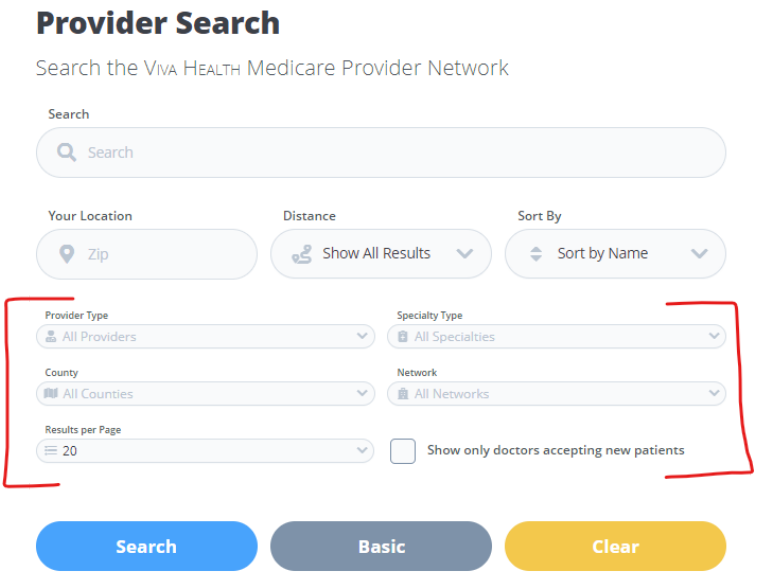
To order materials

- ❖ click *New Order*
- ❖ Verify the recipient details and mailing address. Materials can be mailed to a Viva Health Cafe or to a different address.
- ❖ Select the materials and submit the order.



Provider Search

Provider Search allows for basic and advanced search. The page opens to the basic search, and advanced options can be displayed by clicking *Advanced.*



Basic Search

- ❖ Search
  - ➢ Use this field to search for providers
  - ➢ Text box. Default is blank
- ❖ Your Location
  - ➢ Use to enter a zip code for search parameters
  - ➢ Numeric field. Default is blank.
- ❖ Distance
  - ➢ Use to enter the distance from the zip code for the search parameters
  - ➢ Dropdown menu. Default Show All Results. Choose mile radius from zip code for search.
- ❖ Sort By
  - ➢ Use to choose how the results list should be sorted
  - ➢ Dropdown menu. Default is Sort by Name (provider name), an additional choice is to sort by distance.

Advanced Search

- ❖ Provider Type
  - ➢ Use to filter results list by type of provider.
  - ➢ Dropdown menu. Default All Providers. Additional options are available.
- ❖ Specialty Type
  - ➢ Use to filter results list by provider speciality type.
  - ➢ Dropdown menu. Default All Specialties. Additional options are available.
- ❖ County
  - ➢ Use to filter the results list by county location of the provider.
  - ➢ Dropdown menu. Default All Counties. All Alabama counties are available for selection.
- ❖ Network

    - Use to filter the results list by network.
    - Dropdown menu. Default All Networks. All Viva Medicare networks are available as options.
- Results per Page
    - Use this field to choose the maximum number of results to display in the result list.
    - Dropdown menu. Default is 20. Choose the number of records to show on the results page at a time.
- Show only doctors accepting new patients
    - Use this field to filter the results list to show only doctors accepting new patients.
    - Default unchecked.

Drug Search

The Drug Search option on the left hand navigation opens the public Drug Search web page which contains instructions on how to use the drug search and the 3rd party website links to perform the search.

User Guide

The User Guide option on the left hand navigation opens the PDF document containing the Agent Portal User Manual.