

My Humana Business Training Outline:

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- Working with Reports
- Check Application Status

My Humana Business Check Application Status

PURPOSE: This job aid provides instructions and definitions for checking the application status. Definitions of Pended Applications Status Reasons with Agent action is included.

SCOPE: All Agents

Introduction:

An application status begins with **Submitted Application** (Application received).

It then moves into either **In Progress Application** or **Pending Application**, determined by the reason. Finally it moves to **Active Policy**.

Active Policies may become **Inactive Policies** for various reasons identified in the status reason column, including if the member is now Deceased, dis-enrolled, moved out of the service area or has changed policies.

Status	Status Reason
Submitted Application	Application Received
In Progress Application	Processing Application Preparing for CMS Accreted with CMS
Active Policy	Accreted with CMS (<i>member added to the plan</i>)
Inactive Policy	Deceased Disenrollment by member Option change Out of Service Area Prefers/enrolled in another Humana plan Prefers/enrolled in non-Humana plan
Pending Application	Potential Duplicate Validation in progress Validating: Missing/invalid election type Validation of name in progress Validating: Effective date Validating: Missing or invalid PCP or PCP number Validating: Med Supp. Validating: SEP selection Validating: Member information

Continue on next page.

Standard Humana Reports:

There are three standard Humana reports. Click the report to view.

A. Active Policies

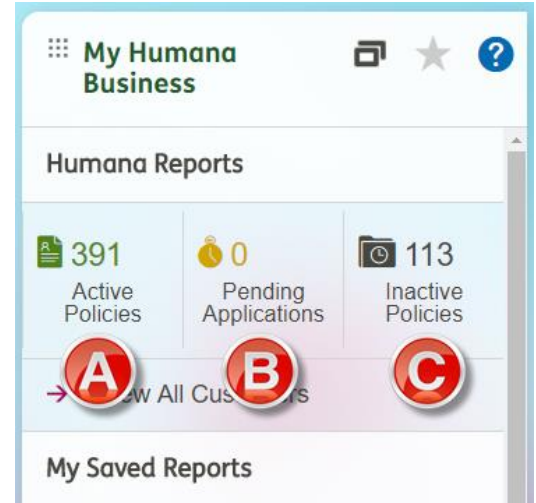
This links to the standard report showing all active policies.

B. Pending Applications

A pended application is one placed on hold while an issue with the application is resolved. Things that might cause an application to pend are missing or invalid information, or a possible duplicate application, etc. Agents should check the status reason for any application listed as pending to see if they need to submit a correction. Many status reasons do not require agent action to resolve the pended application; those not requiring agent action will be resolved by enrollment services. (See the table *Pended Applications Status Reason Definitions and Agent Action* below)

C. Inactive Policies

Reasons the policy may become inactive include, but are not limited to: Deceased; Disenrollment by member; Option change; Out of Service Area; Prefers/enrolled in another Humana plan; or Prefers/enrolled in non-Humana plan.



View All Customers:

To view all customers click either on the expand icon at the top or the View All Customers link under the standard Humana Reports.

Filter In Progress Applications

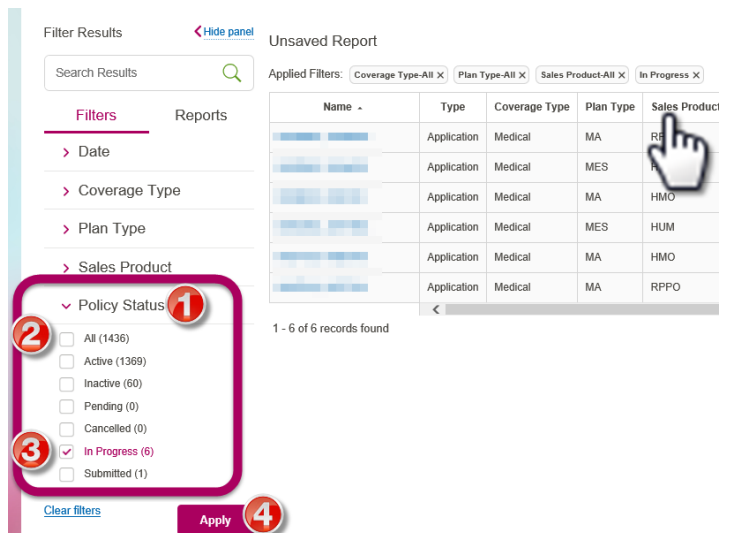
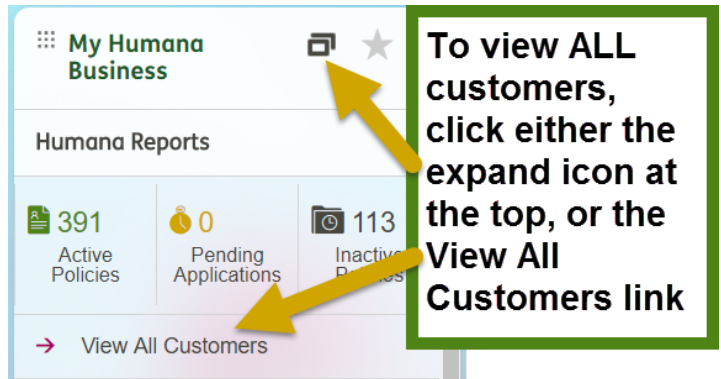
In Progress applications are those currently being processed and have not pended. There are three stages to an application's process: Processing Application; Preparing for CMS; and Accreted with CMS. To filter for In Progress Applications:

Once in the **All Customers List**,

1. Open the **Policy Status** options under Filters along the left side
2. Un-check **All** (this will also uncheck all of the item below it)
3. Re-check **In Progress**
4. Click **Apply**

Click any column heading to sort by that column.

Continue on next page.



Pended Applications Status Reason Definitions and Agent Action:

Status Reason	Definition	Agent Action
Potential Duplicate	More than one application was submitted for the same person	No agent action required
Validation in progress		
Validating: Missing/invalid election type	Election type missing/incorrect	Submit valid election type code via the Agent Statement for Enrollment Correction form
Validation of name in progress		No agent action required
Validating: Effective date	missing or incorrect effective date	No agent action required
Validating: Missing or invalid PCP or PCP number	missing or invalid Primary Care Physician (PCP) information required on HMO applications	No agent action required If unable to find the PCP, the member will be assigned to one. Members can change their PCP by logging into MyHumana or calling Customer Support
Validating: Med Supp		
Validating: SEP selection	Election period missing/incorrect	Submit valid Special Election Period code via the Agent Statement for Enrollment Correction form
Validating: Member information	Missing information such as address, DOB, etc.	

Humana Vantage Agent Portal forms – Agent Process:

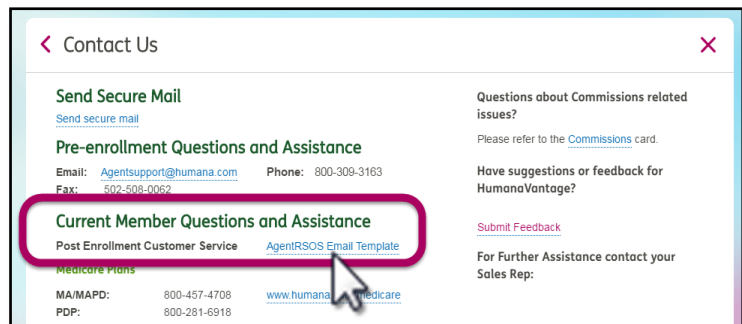
To make corrections to submitted applications, use the: Agent Statement for Enrollment Correction (ASEC) for correcting mistakes made on an MA/MAPD or PDP application; or Med Supp Agent Statement for Enrollment Correction for correcting mistakes made on a Medicare Supplement application.

In Humana Vantage Agent Portal click on



Contact us in the upper right corner below your name.

Click on the **AgentRSOS Email Template** link under Current Member Questions and Assistance.



For more information using the AgentRSOS Email Templates see [TRN-REF-868f-Vantage - Retail Sales Operation Support \(RSOS\) Forms](#) (for this link to work, you must be logged into Humana MarketPoint University)

Process complete