

GETTING STARTED WITH MUTUAL OF OMAHA

Medicare Supplement | Dental

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Introduction to Sales Professional Access

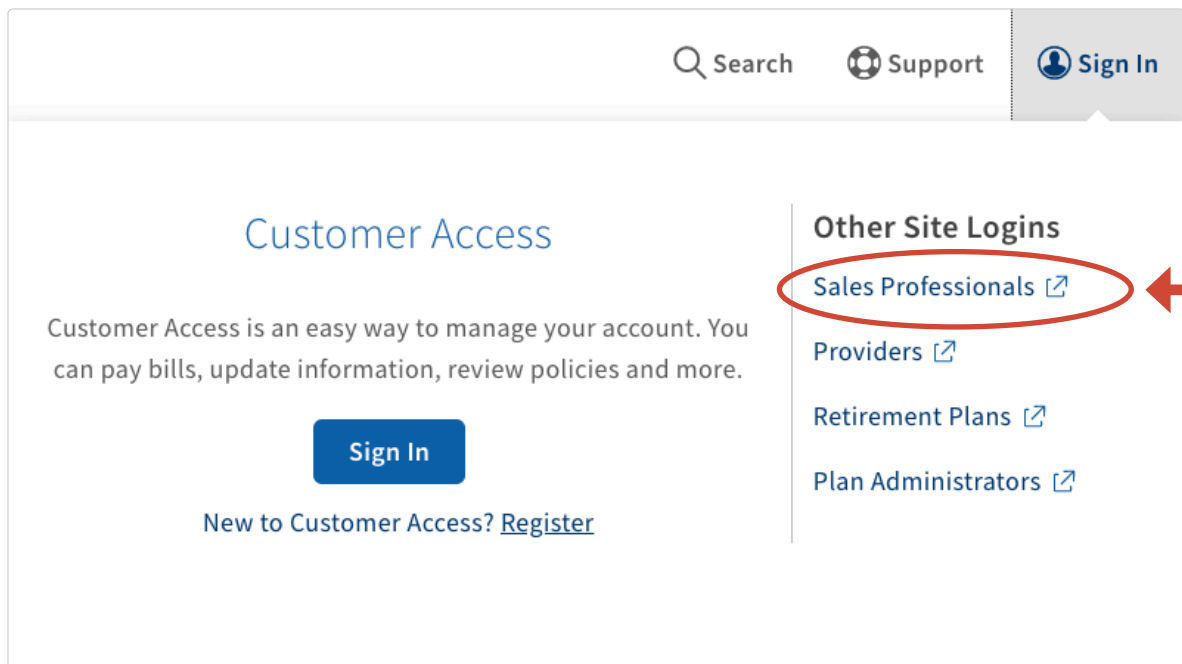
Sales Professional Access (SPA) is your one-stop shop to find all the resources you need at Mutual of Omaha.

After logging in you can find:

- Product information and sales ideas
- Downloadable PDFs of all forms and marketing materials
- Quoting software
- e-Applications
- Reports

How to Register on SPA

- Open your web browser (Chrome, Edge, Firefox, or Safari) and enter **www.mutualofomaha.com** in the address bar.
- Click on "Sign in" and choose "Sales Professionals".



If you have a corporation production number and an individual production number, you must register the corporation production number first. Once the corporation is registered, log in to SPA using the corporation credentials, hover over the profile icon in the upper-right hand corner and select "Profile". You are prompted to enter your personal production number and date of birth. The next time you log in, you are presented with two entitlement options: one for the corporation and the other for your personal production number.

- Enter your production number in the text box and click "Continue".

1
Validation

Welcome to Mutual of Omaha!
Please fill in the fields below to register for access to Sales Professional Access.

Production Number:

It is important that you complete all fields on the registration form.

Note: The "Continue" button will not be enabled until all required fields have been completed.

- Enter your "Date of Birth" and check the "I Accept Terms and Conditions" box and click "Continue".

1
Validation

2
Registration

3
Complete

Welcome to Mutual of Omaha!
Please fill in the fields below to register for access to Sales Professional Access.

Production Number:

Date Of Birth (MM/DD/YYYY):

By accessing, viewing, or using the material on the Mutual of Omaha Companies Web site, "mutualofomaha.com," or by your registration to use the secure sales professional access systems, services and materials, you indicate that you understand and intend to be bound by the "[Terms and Conditions of Use](#)". You further agree to accept such [Terms and Conditions of Use](#) and agree to be legally bound by them. If you do not agree, you are not granted permission to use these Web sites and should exit immediately.

I Accept Terms and Conditions

- Create your account by answering all questions. Then select “Sign Up”.

1 Validation

2 Registration

3 Complete

Let's create your own account.

Already have an account? [Sign in](#)

First Name

Last Name

Email

Security Question

Who is your favorite sports player? ▾

Username

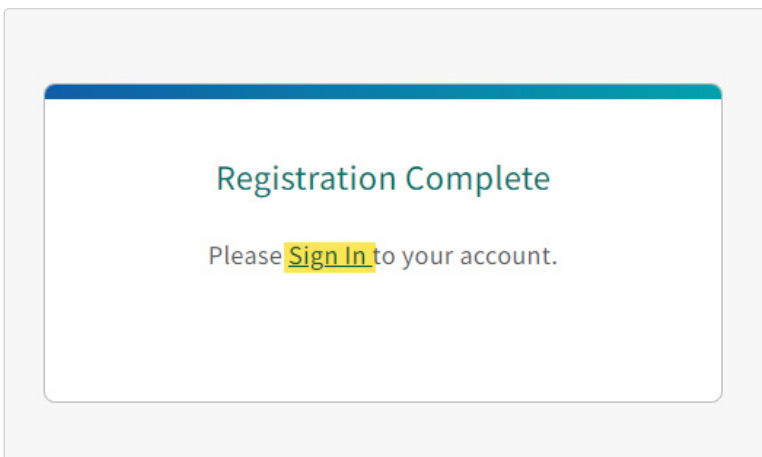
Password

Confirm Password

Answer

Sign up Cancel

- Once signed up, you will see “Registration Complete” and are prompted to sign into your account.

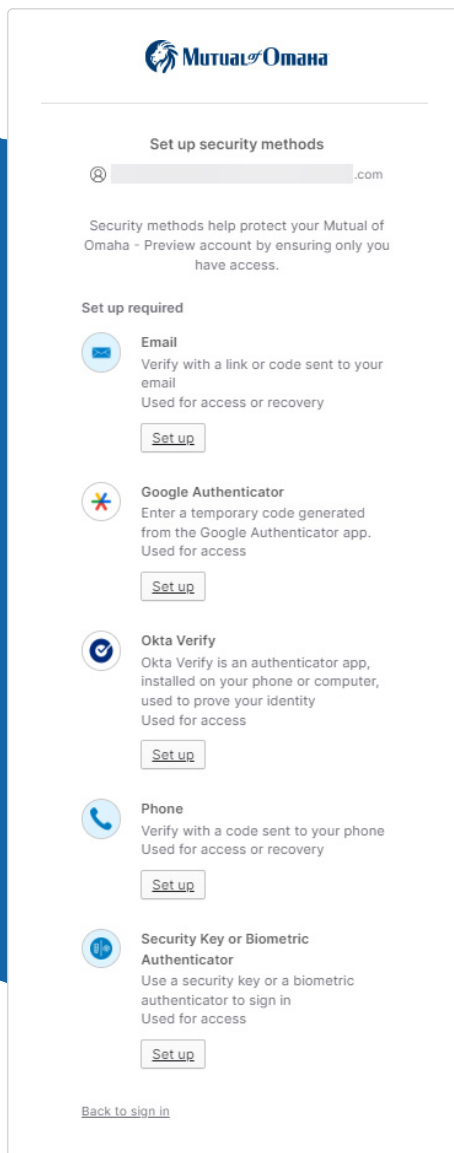
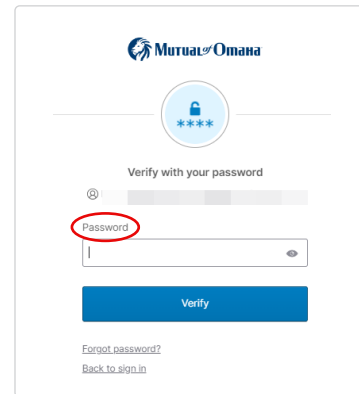
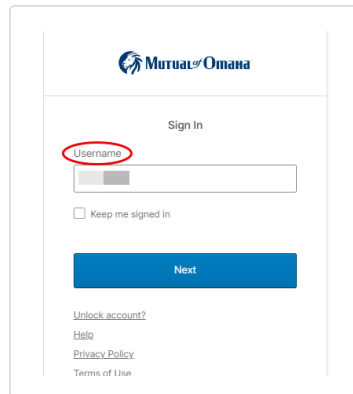


**You are now registered for SPA
and will need to register for Okta.**

You will be instructed to log in using the username
or email address and password you have created.

Logging into SPA and Okta is Not Set Up

1. At the SPA login type in your SPA username on the first screen and password on the second screen, then click the "Verify" button.
2. After logging in, if you have not set up an Okta Multifactor Authentication (MFA), you will be directed to the below screen.



Set up security methods

Security methods help protect your Mutual of Omaha - Preview account by ensuring only you have access.

Set up required

- Email**
Verify with a link or code sent to your email
Used for access or recovery
[Set up](#)
- Google Authenticator**
Enter a temporary code generated from the Google Authenticator app.
Used for access
[Set up](#)
- Okta Verify**
Okta Verify is an authenticator app, installed on your phone or computer, used to prove your identity
Used for access
[Set up](#)
- Phone**
Verify with a code sent to your phone
Used for access or recovery
[Set up](#)
- Security Key or Biometric Authenticator**
Use a security key or a biometric authenticator to sign in
Used for access
[Set up](#)

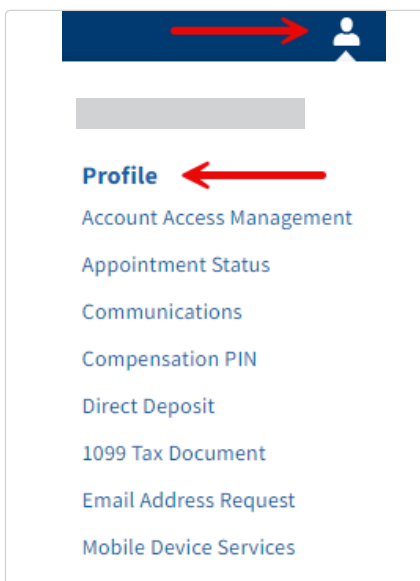
[Back to sign in](#)

3. Click on "Setup" next to the MFA you want to set up and follow the setup prompts.
 - Okta MFA Instructions
 - It is recommended that you setup more than 1 MFA.
4. Click "Finish" and continue to SPA.

NOTE: Make sure you have verified your Security email address on SPA before setting up an Email Authentication, using the instructions on the next page.

How to Update Your Sales Professional Access (SPA) Email Address

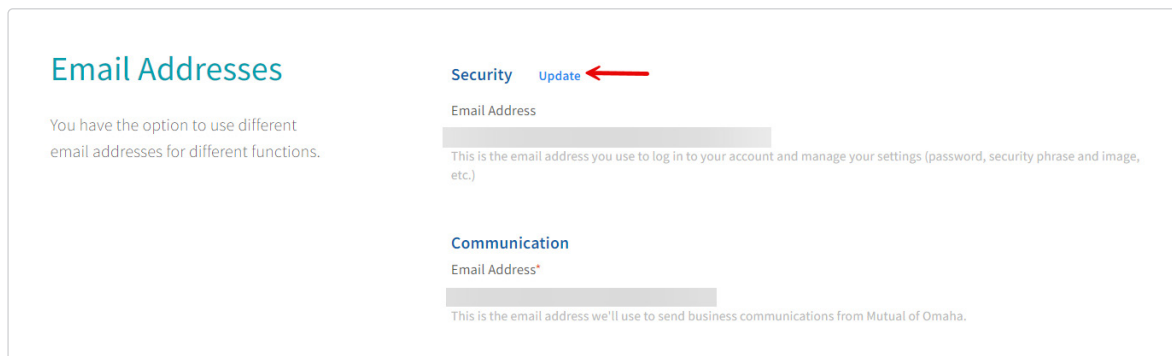
To authenticate using your email address, you must follow the following steps **BEFORE** you click the **Email Authentication Setup** button. The email address you have listed on **Sales Professional Access** is where the authentication email will be sent. There is not an option to enter an email address, for the authentication email to go to. Please follow the steps below prior to setting up **Email Authentication**.



Updating Your Sales Professional Access (SPA) Email Address:

- Log on to Sales Professional Access (www.mutualofomaha.com/broker)
- In upper right-hand corner, select image of the person
- Select "Profile"
- Review your information and update as needed
- After the change(s) are made, click "Update"

If you need to update your email address that is associated with SPA, you will click the blue "Update" button (see below).



This is your email address that the email authentication will go to. **Please review for accuracy!** If you need to update your email information and have clicked the blue "Update" button, you will be redirected to the "Profile Edit" screen (see image on following page).

Here you can edit your email address. When finished click the blue "Update" button.

The screenshot shows a web interface with a navigation bar at the top containing "Profile" (circled in red) and "Security". Below the navigation bar, there are four input fields: "First Name", "Last Name", "Security Email Address", and "Username". The "Security Email Address" field is highlighted with a red arrow pointing to it. Below this field is a small text note: "This is the email address you use to log in to your account and manage your settings. (password, security phrase and image, etc.)". At the bottom left, there is a blue "Update" button with a red arrow pointing to it. On the right side, there are two yellow informational boxes. The top one is titled "For Sales Professional Access" and contains text about name changes and contact information for Producer Services. The bottom one is titled "Multifactor Settings" and mentions that settings can be changed at login.mutualofomaha.com. Below these boxes is a section titled "My Applications" with the text "MedSuppConsumerEApp".

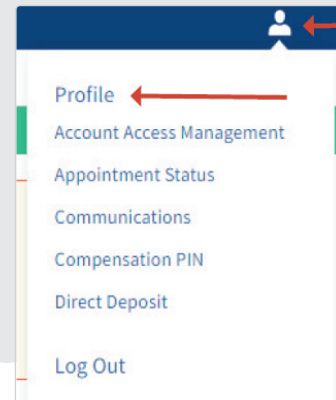
Once you have clicked the "Update" button, you will see a note that says, "Successfully updated profile" located above the blue "Update" button. To go back to your profile, click the blue "Back to My Profile" button.

The screenshot shows the same web interface as the previous one, but after a successful update. A blue "Back to My Profile" button is now visible at the top right, with a red arrow pointing to it. The "Security Email Address" field is still present. Below the "Username" field, a confirmation message reads "Successfully updated profile." with a red arrow pointing to it. The "Update" button is still visible at the bottom left. The informational boxes and "My Applications" section remain the same.

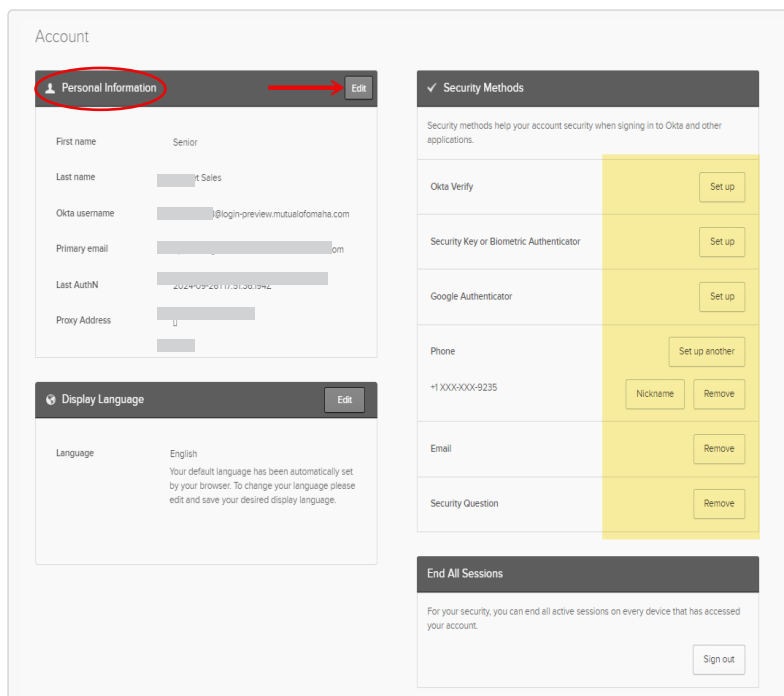
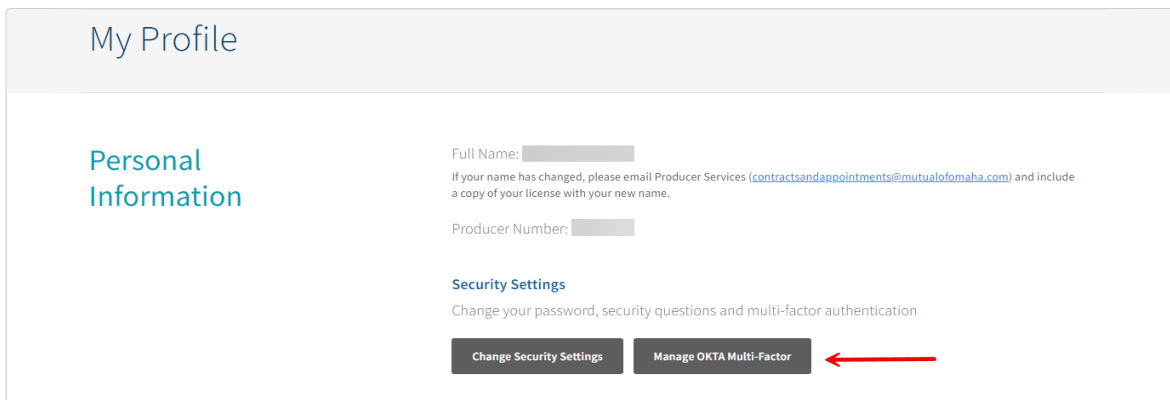
Once you have successfully set up authentication methods, you will receive a confirmation email, regardless of the type of authentication set up, to the SPA email address on file.

Managing Your Okta Multi-Factor Authorization Methods on Your Dashboard:

Log into your Sales Professional Access (SPA) account, as you normally would. Once you are on your SPA home page, click the person in the top, right hand corner. Then select "Profile" from the drop-down.



You will then have the option to click the box "Manage Okta Multi-Factor" linking you to the Okta Dashboard, where you can edit and update your information, as well as manage your Okta MFA methods.

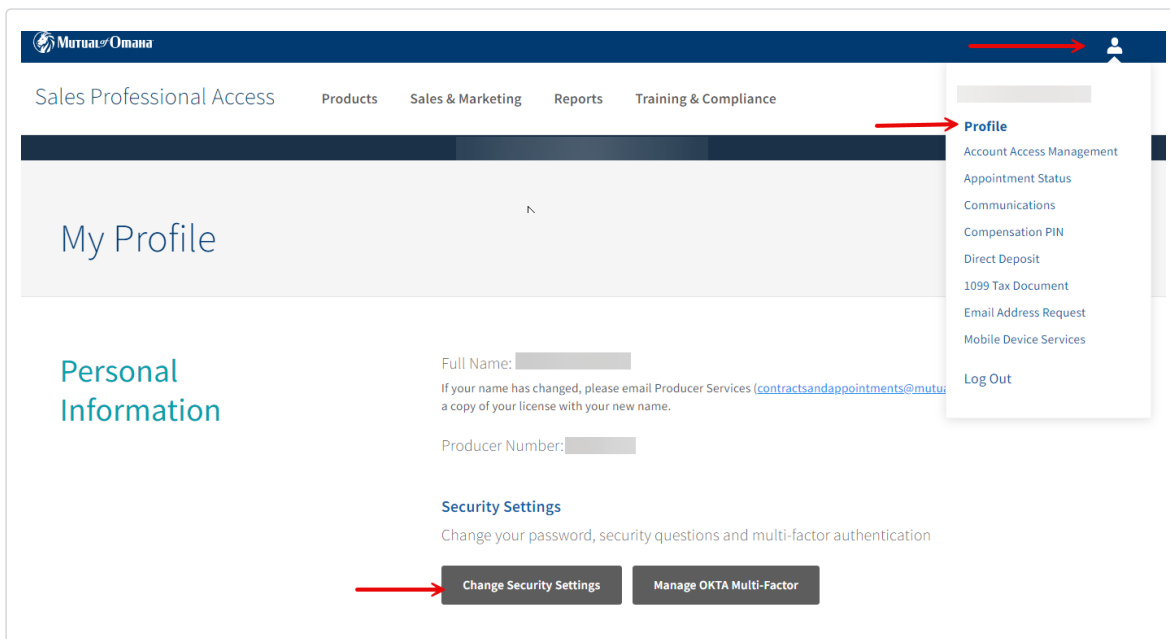


Once you have clicked the "Manage Okta Multi-Factor" button, you will see the "Edit" option on the "Personal Information" box (left image). Here you can select the "Edit" button to update your profile, as well as set up or manage your MFA methods.

Identifying Your Username on SPA or Updating Your Password

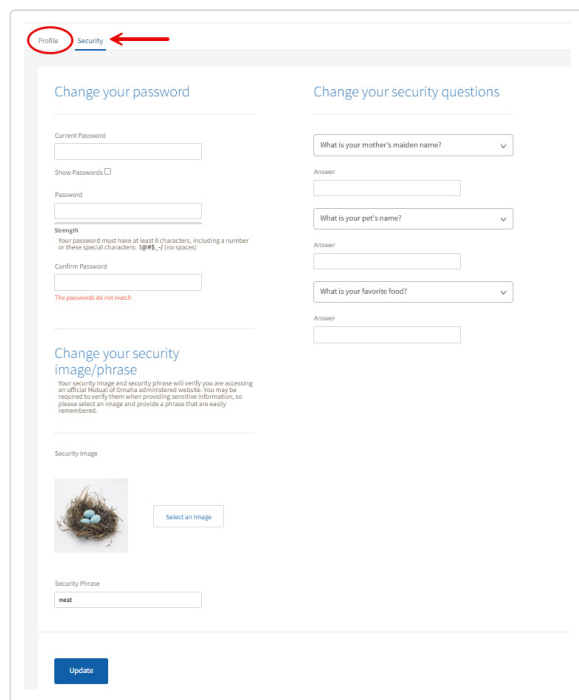
If you are unsure of what your Sales Professional Access username is, it can be identified using the following steps:

1. Click the person image in the top righthand corner of your screen, then select "Profile".
2. Once in the "Profile": "Personal Information" tab, you will see your name, as well as a blue button that says "Change Security Settings". Click this blue button, to go into the "Security" portion of your profile.



3. This screen will show your "Profile" and "Security" settings. On the "Security" screen, you can change your password, security questions, email address, and identify your username.

Your username, as well as your email address, associated with your Sales Professional Access account, can be found here, under the "Profile" tab mentioned above.



How to Add an Authorized User on SPA (optional)

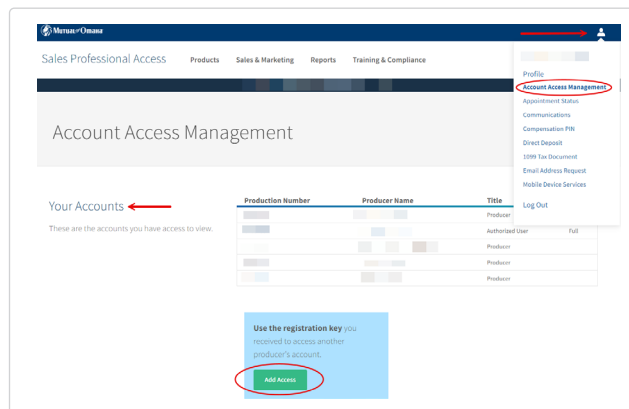
You will need your SPA username, not your email address to authenticate.

ALL users of SPA need to set up Okta, and you may need to add Authorized Users to your SPA account

- This information can be found next to the “Your Accounts” section.
- Each authorized user will have their own login credentials to SPA.
- **Okta is a two-factor authorization process. Login credentials cannot be shared.**

How to Add an Authorized User to SPA

- Login to Sales Professional Access
- Select the “Profile” image in the upper right-hand corner and select “Account Access Management” from the drop-down



Add an Authorized User
Please provide the following information for the individual you would like to add:

First Name:
Middle Name:
Last Name:
Please enter a valid first name Please enter a valid last name

Date of Birth:
Email:
This must match the Authorized User's actual date of birth because it will be used during registration. Please enter a valid email address
Please enter a valid birth date with MM/DD/YYYY format

Access Level:
 Full Moderate Limited

I agree to the [terms and conditions](#) Please agree to the terms and conditions

On this page you can view your accounts, receive access to another producer's account (if applicable), as well as review, manage, or add authorized users.

Determine the Access Level each authorized user should be granted

- You can select the level of access each authorized user has on SPA. The criteria for each level is below the "Add an Authorized User" section.
- Note: SPA accounts with a Compensation PIN will still require the PIN to view Compensation Reports and Direct Deposit information.**

There are three security levels:
Agents can select which level of access they want their authorized users to have.

	Full Access	Moderate Access	Limited Access
Online Pay	✓		
Compensation Reports	✓		
Manager Comp Reports- If agent was manager and returned to personal production.	✓		
Non Pay Reports	✓	✓	✓
Persistency Report	✓		
Shrinkage Report	✓		
Direct Deposit Enrollment/Change	✓	✓	
Navigator	✓	✓	✓
Payment Management	✓	✓	
Market on Demand	✓	✓	✓
Website Creator	✓	✓	✓
Winflex Downloads	✓	✓	✓

How to Add an Authorized User to SPA

- For each user of SPA, add them as an authorized user by completing the required fields.

Authorized Users

You can assign others to have access to your Sales Professional Access account. This is being offered so you won't have to share your user ID with others.

Changes are generally handled within one business day.
[Watch a short video to learn more.](#)

Add an Authorized User

Please provide the following information for the individual you would like to add:

First Name Middle Name Last Name

Date of Birth Email

This must match the Authorized User's actual date of birth because it will be used during registration.

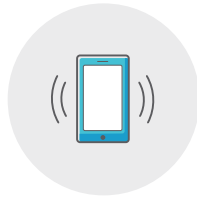
Access Level
 Full Moderate Limited

I agree to the [terms and conditions](#)

NOTE: the Date of Birth (DOB) MUST match the authorized user's actual DOB

Next Steps for the Authorized User

- Once you select “Submit” to add an authorized user, the authorized user will receive an email from Mutual of Omaha to complete the registration process.
- The authorized user should follow the instructions in the email to complete the registration process.

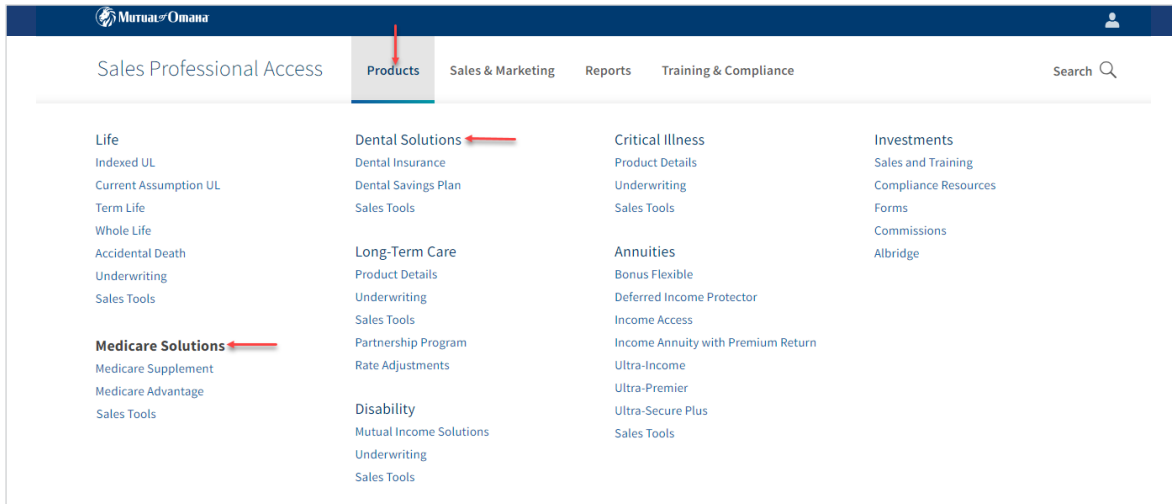


Questions?

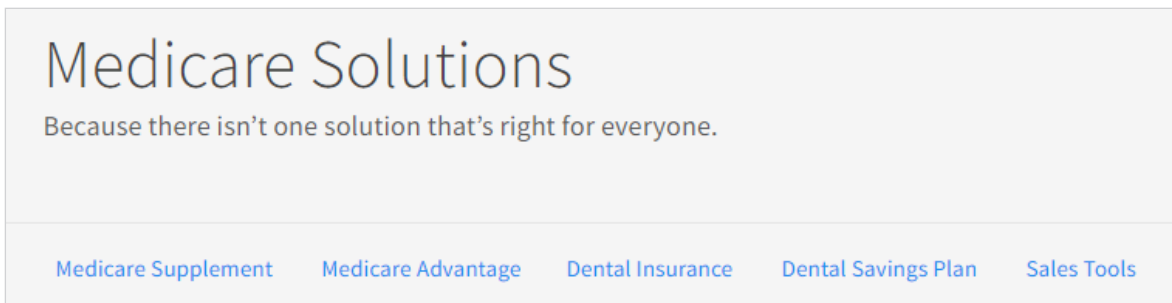
Please call our Field Assistance Center at
800-847-9785

Product Information

From the home page, hover over the “Products” tab in the navigation bar and select “Medicare Solutions” from the drop-down menu.



Each tab has additional information on our Medicare Solutions products.

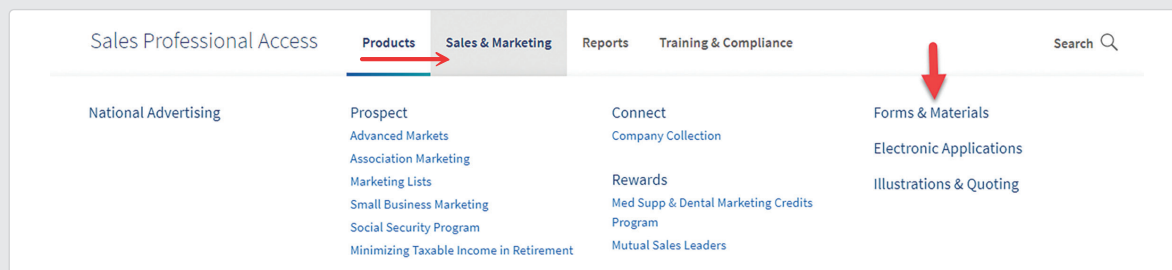


The “Sales Tools” tab helps you learn even more about our products and their competitive advantages, and provides access to our sales materials.



Forms & Materials

From the home page, hover over the “Sales & Marketing” tab in the navigation bar and select “Forms & Materials” from the drop-down menu.



For all basic searches you must select one of the following:

1 Company

- Medicare Supplement — Mutual of Omaha and its affiliates
- Mutual of Omaha — Dental, Cancer, Heart Attack & Stroke

2 Service Type

- **New Business**
Materials needed to submit business (app pack, outline of coverage)
- **Marketing**
Materials used in sales process and prospecting (brochure, highlight sheet and postcards)
- **Policyholder Service**
Materials needed post sale

3 State

(Note: quite a few forms are state specific)

4 Product Type

- These will change based on the company you picked
(Note: all products will show even if you are not appointed to sell them)

5 Product Name

Search Results

A list of all approved materials, based on the filters you selected, will be displayed on the screen.

Forms & Materials

Search Results (25) [Start New Search](#)

CARRIER
Medicare Supplement - Mutual of Omaha and all affiliates

PRODUCT NAME
Medicare Supplement - Brokerage

STATE
Alabama

Document Name	Description	Notes	Package (4)
MAP642_AL_08-28-24	AL - Dental Application Booklet	Must complete and sign. Includes App, Rates and Outline. Also included in Medicare supplement booklet.	<input checked="" type="checkbox"/> MAP642_AL_08-28-24
N143306_AL_0824	Med Supp Application Pack - AL	Download and Print Only	<input checked="" type="checkbox"/> N143306_AL_0824
619422 - 2024 Medicare and You	Medicare and You Handbook 2024	Medicare and You Handbook 2024. Download only.	<input checked="" type="checkbox"/> 619422 - 2024 Medicare and You
HCFA02110_2024_Medigap...	2024 Guide to Health Insurance for People with Medicare	Leave with insured	<input checked="" type="checkbox"/> HCFA02110_2024_MedigapHe...
NAP22_AL_08-28-24 WD	Medicare Supplement Application Booklet and Dental Application Booklet - AL	Print Date 08/28/2024. For new business. Includes Med Supp App Pack and Outline and Dental App Book. To individually print these items, specify the specific page numbers in your print settings.	<input type="checkbox"/>
290277_0921 - 3368_MEMR_GP_MA_Client-Overview_MutualMedSupp...	Amplifon (Hearing) Flyer	Hearing flyer which explains information available to current Medicare Supplement policyholders.	<input type="checkbox"/>

[Email](#) [Print](#)

To view an item, click the form number listed under “Document Name.” You can save the documents to your computer, email or print them off. Some forms can be filled out before saving or printing.

The forms highlighted in yellow are the forms selected in the “Package” drop-down. This will group forms together to be saved, emailed or printed.

Quoting

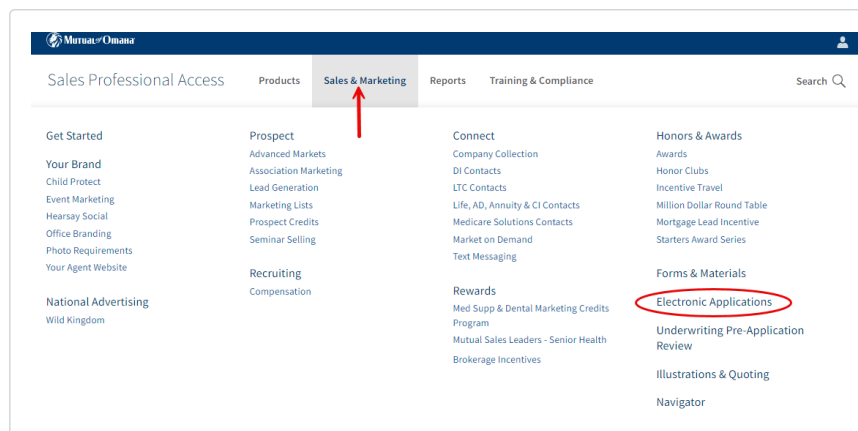
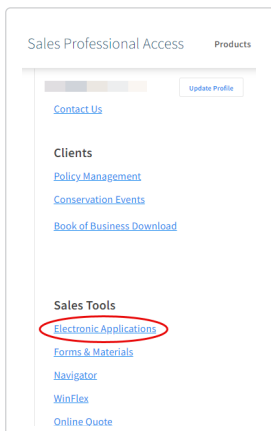
Install our Quotes for Sales Professionals mobile quoting app to your device to provide Med supp and dental insurance rate quotes on the go.

- 1 Go to your app store
- 2 Search for "Mutual of Omaha Quotes for Sales Professionals"
- 3 Install and start quoting!



e-Applications

You can get to the Medicare Supplement and Dental e-Apps from either the SPA home page or the "Sales & Marketing" tab.

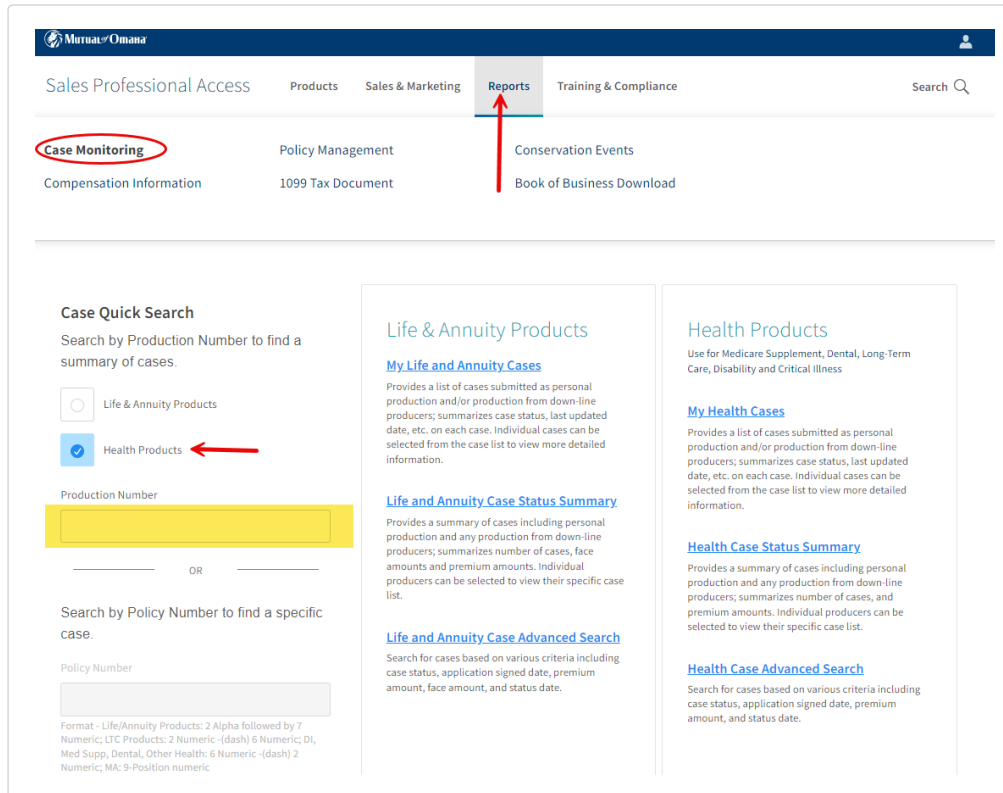


Choose the product you want from the menu on the left hand side. When you are ready to start an e-App, select "Start e-App." You will also find resources, user guides and a video for the e-Apps.

Reporting

Case Status

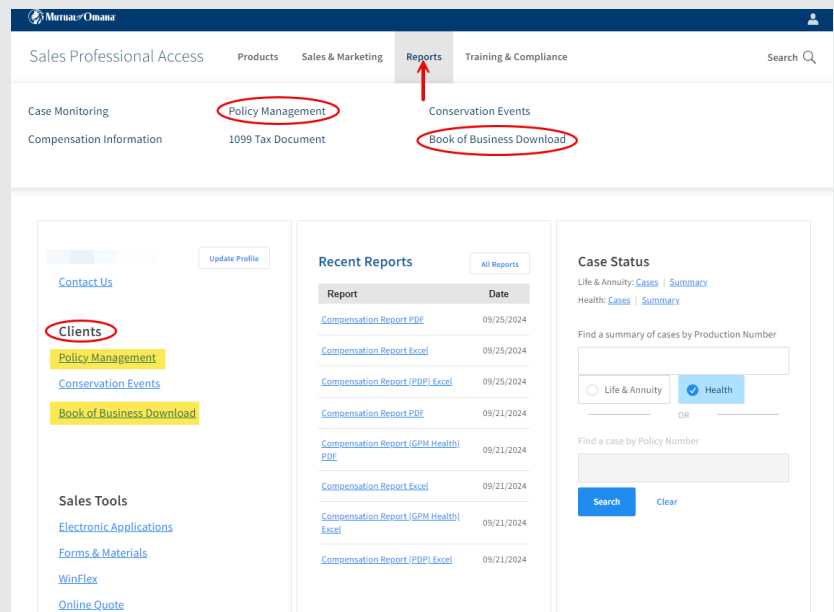
From the "Reports" tab, select "Case Monitoring". On the left hand side of the screen, select "Health Products" and type in your production number. This will show all cases submitted in the last 60 days and what their current status is. You also have the option within this report to export and/or print your cases.



Policyholder Information

Note: The Policy Management Tool will replace the current Policyholder Information links on SPA.

To access cases submitted, click on the "Policy Management" link under the "Clients" portion of your SPA home page. You are also able to view and download policies using the "Book of Business" tool. You can also find these under the "Reports" tab.



Book of Business Download — Get inforce policy information by downloading your Mutual of Omaha policies you have sold using the Book of Business download. Select the type of policy you are looking for and follow the prompts to receive an Excel file to download with the policy information selected.

Policy Management Tool — The Policy Management Tool will display inforce policies without having to download a list and gives you quick stats and access to view a PDF of the policy. Use the drop-down menu to search for a specific policy, using the different criteria options. Clicking “View Details” will show you all the policy information, giving you the ability to download a PDF of the entire policy.

The “Download Options” link takes you to the “Book of Business” page, mentioned above.

Policy Management

Active Business

Search for your active policies below. Additionally, you may view inactive policies by searching with a policy number.

Total Number of Policies
28
Active Policies

Search Criteria

Policy Number [Search](#) [Filter & Sort](#) [Reset](#)

- Policy Number
- Client's Name
- Client's Last Four Digits of SSN
- Writing Producer's Name
- Writing Producer's Number
- Writing Producer's National Producer Number(NPN) #ess.

[Download Options](#)

Updated Daily

i Active policies sold under a Special Agent contract are not accessible to the writing Special Agent.

Status Active
Paid to Date: 02/28/2025

Policy
Medicare Supplement Plan G
High Deductible

Client

Writing Producer
Annualized Premium:
\$586.64

[View Details >](#)

Under the “View Digital Policy PDF” link, you will see a link that says “Get a Duplicate Policy ID Card”. By clicking the “Get a Duplicate Policy ID Card” link, you are able to download, print, or email a duplicate PDF version of your policyholder’s Medicare supplement policy ID card.

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[Back](#) Policy Details

Medicare Supplement Plan M

Policy Information

Type of Coverage Medicare Supplement	Company Name United of Omaha Life Insurance Company	Issue Date 07/15/2024
Policy Effective Date 07/15/2024	Paid To Date 07/15/2025	Mode Regular
Frequency Annual	Premium \$2,237.81	Minimum Premium Due \$0.00
U/W Class Not Applicable	Rate Age 65	Tobacco Status Agreement is rated based on Non Tobacco usage.

Resources

[View Digital Policy PDF](#)

[Get a Duplicate Policy ID Card](#)

Relationships

Client(s)
Insured, Owner

Writing Producer(s)

Split: 100%

Get Duplicate Policy ID Card

Please download and print your policy ID card from the PDF.

[View Policy ID Card \(PDF\)](#)

Compensation Information

To find detailed commission statements, select the "Reports" tab. On the "Reports" page, scroll down to the "Compensation Information" section to see your latest compensation statements. Otherwise you are able to find your compensation information under the "Recent Reports" portion on your SPA homepage, in the center of the page.

The screenshot displays the Mutual of Omaha SPA homepage. At the top, the navigation bar includes 'Sales Professional Access', 'Products', 'Sales & Marketing', 'Reports' (highlighted with a red arrow), and 'Training & Compliance'. Below this, a secondary menu lists 'Case Monitoring', 'Policy Management', 'Conservation Events', 'Compensation Information' (circled in red), '1099 Tax Document', and 'Book of Business Download'. The main content area is divided into three columns. The left column shows user information for 'MICHAEL BRINES' and links for 'Clients' and 'Sales Tools'. The middle column features a 'Recent Reports' section (circled in red) with a table of reports and an 'All Reports' link (circled in red). The right column contains a 'Case Status' section with search filters for 'Life & Annuity' and 'Health'.

Report	Date
Compensation Report PDF	09/25/2024
Compensation Report Excel	09/25/2024
Compensation Report (PDP) Excel	09/25/2024
Compensation Report PDF	09/21/2024
Compensation Report (GPM Health) PDF	09/21/2024
Compensation Report Excel	09/21/2024
Compensation Report (GPM Health) Excel	09/21/2024
Compensation Report (PDP) Excel	09/21/2024

MEDICARE SOLUTIONS CONTACTS

Medicare Supplement | Dental

General Contact Information for All Products

Area	Phone Number	Email
Compensation Support	800-475-4465	broker.compensation@mutualofomaha.com
Contracts, Licensing & Producer Services	800-867-6873	contractsandappointments@mutualofomaha.com
Sales Support	800-693-6083	sales.support@mutualofomaha.com
Tech Support	800-847-9785	producertechsupport@mutualofomaha.com
Senior Health Sales Team		seniorhealthsales@mutualofomaha.com

Medicare Supplement and Dental Only

Area	Phone Number
Policyholder Customer Service mycustomerservicehealth@mutualofomaha.com	800-775-6000
Underwriting	800-995-9324

Dental Only

Area	Phone Number
Fax applications	866-799-9076
Underwriting	855-845-1849
Dental pretreatment estimate	855-218-1466
Nominate a dentist to the network (for provider use only)	855-218-1466
Vision expenses reimbursement (vision claims option)	800-775-1000

Application Submissions

App Type	Med Supp, Dental
e-Apps	MutualofOmaha.com/broker Select the Electronic Applications link on the home page or on the Sales & Marketing tab.
Paper Apps Order application books through normal channels.	Mail — Normal Delivery Mutual of Omaha P.O. Box 3608 Omaha, NE 68103 Mail — Overnight Delivery Mutual of Omaha 3300 Mutual of Omaha Plaza Omaha, NE 68175 Fax to 866-799-9076 When initial premiums are paid through Automated Clearing House (ACH)

Mobile Quote App — Med Supp and Dental

Download to your smartphone and tablet. Search “Quotes for Sales Professionals” in the Apple Store or Google Play.

Producer Website

[Sales Professional Access | MutualofOmaha.com/broker](https://MutualofOmaha.com/broker)

To create your account, click “Sign Up” and follow the instructions. You need your seven-digit Mutual of Omaha production number to register.

