MEDICARE SOLUTIONS

GETTING STARTED WITH MUTUAL OF OMAHA

Medicare Supplement | Dental

Mutual of Omaha
Protect Your Kingdom

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627401

Revised Oct 2024

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Introduction to Sales Professional Access

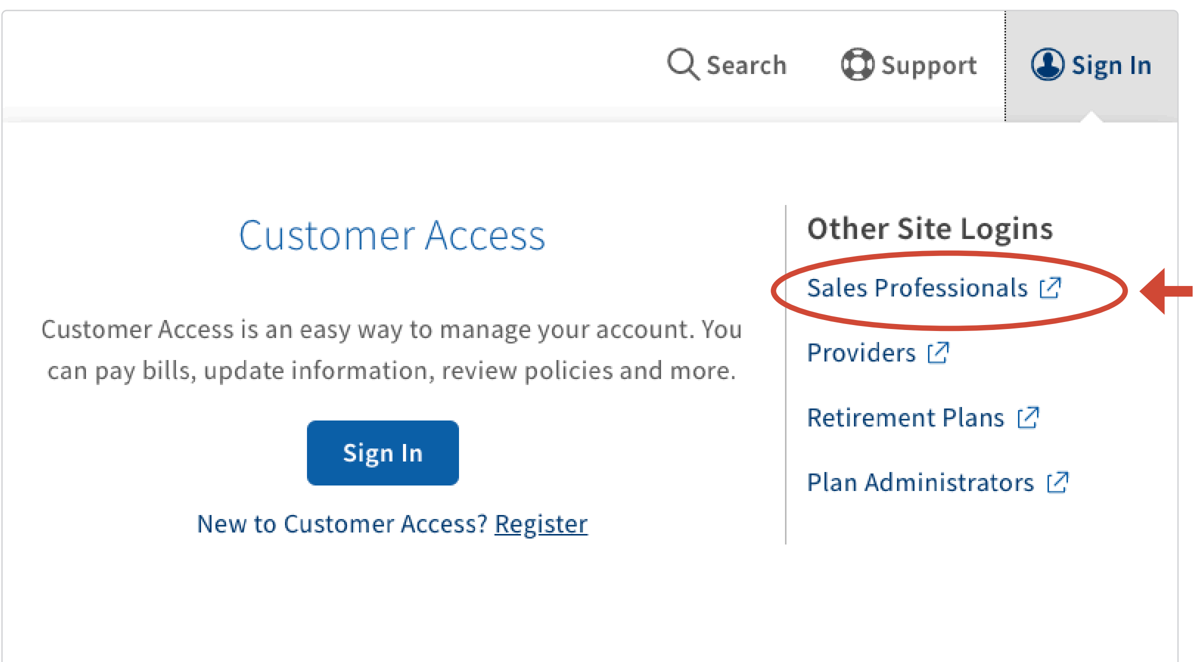
Sales Professional Access (SPA) is your one-stop shop to find all the resources you need at Mutual of Omaha.

After logging in you can find:

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

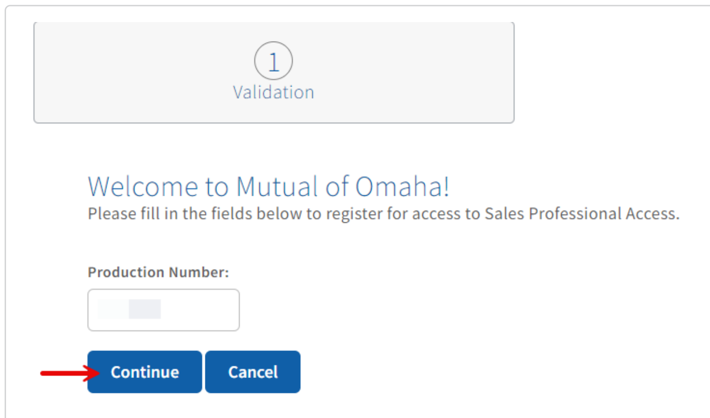
How to Register on SPA

- 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".



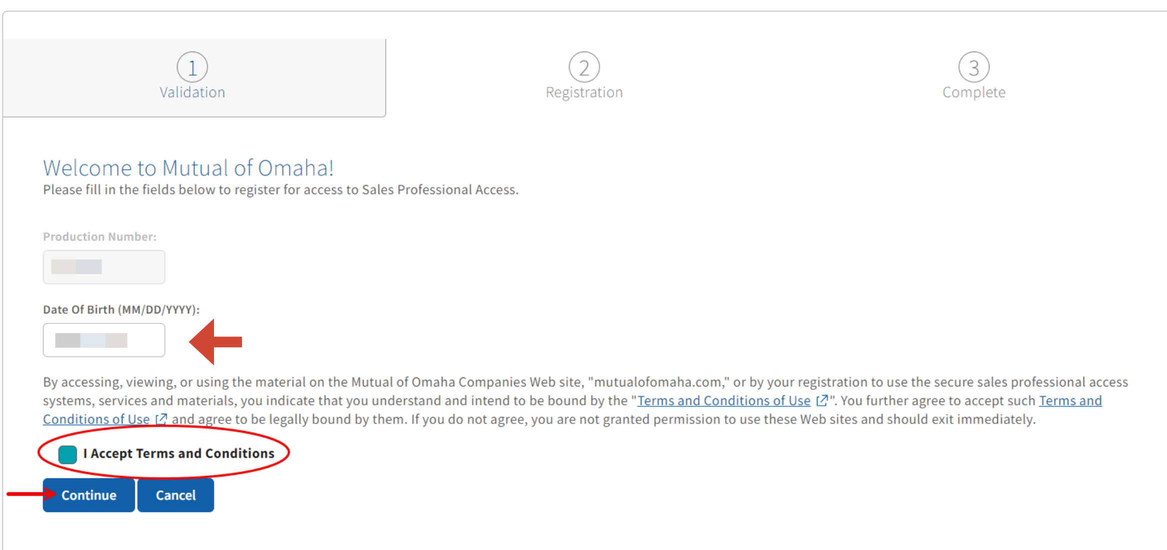
If you have a corporation production number and an individual production number, you must register the corporation production number first. Once the corporation is registered, log in to SPA using the corporation credentials, hover over the profile icon in the upper-right hand corner and select "Profile". 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".

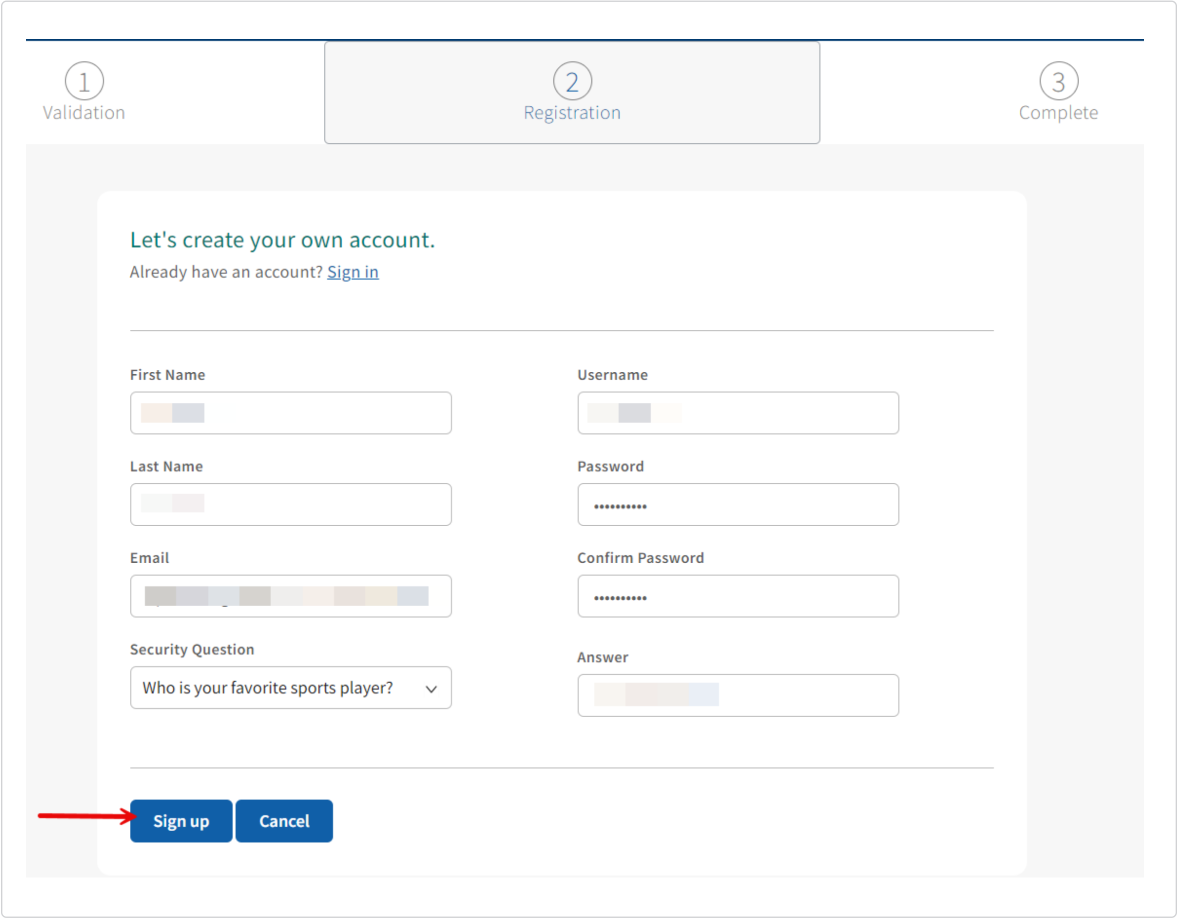


It is important that you complete all fields on the registration form.
Note: The "Continue" button will not be enabled until all required fields have been completed.

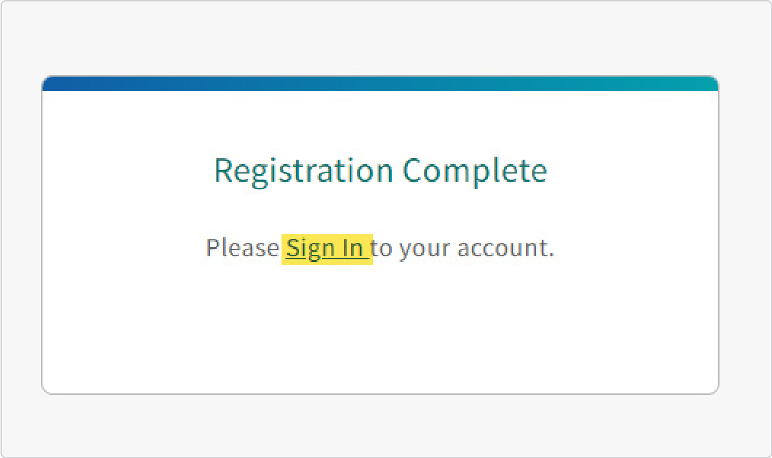
- Enter your "Date of Birth" and check the "I Accept Terms and Conditions" box and click "Continue".



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



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



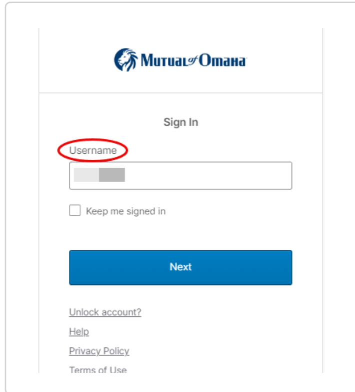
You are now registered for SPA and will need to register for Okta.

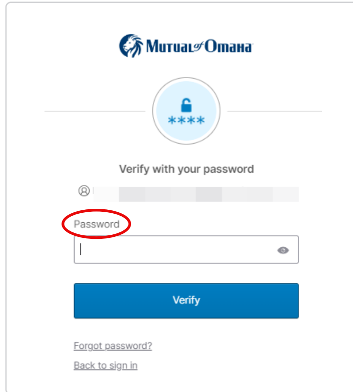
You will be instructed to log in using the username or email address and password you have created.

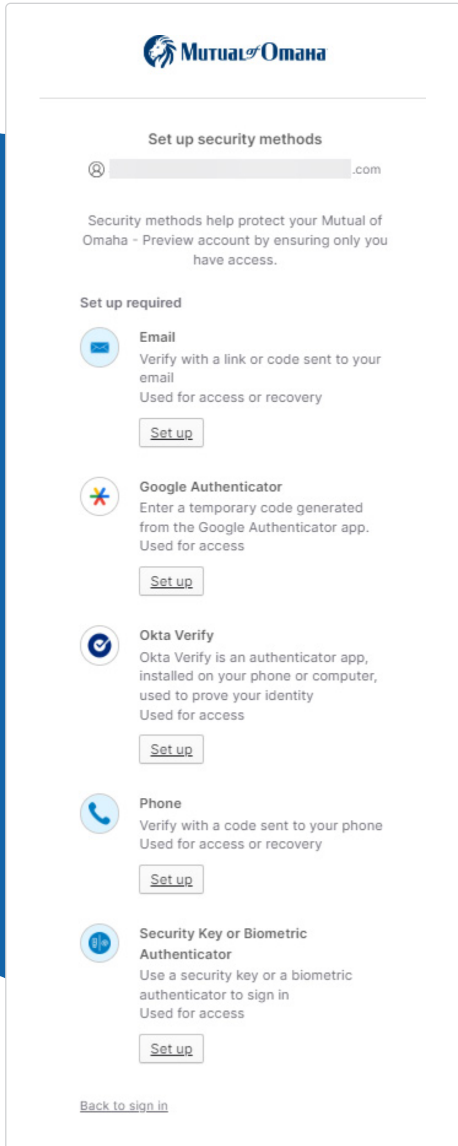
Logging into SPA and Okta is Not Set Up

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.







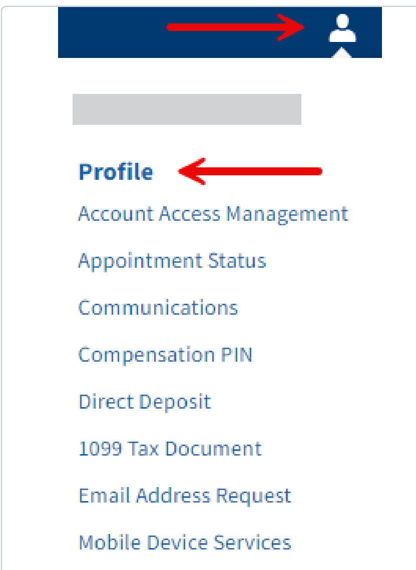
3. Click on "Setup" next to the MFA you want to set up and follow the setup prompts.
   - Okta MFA Instructions
   - It is recommended that you setup more than 1 MFA.

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

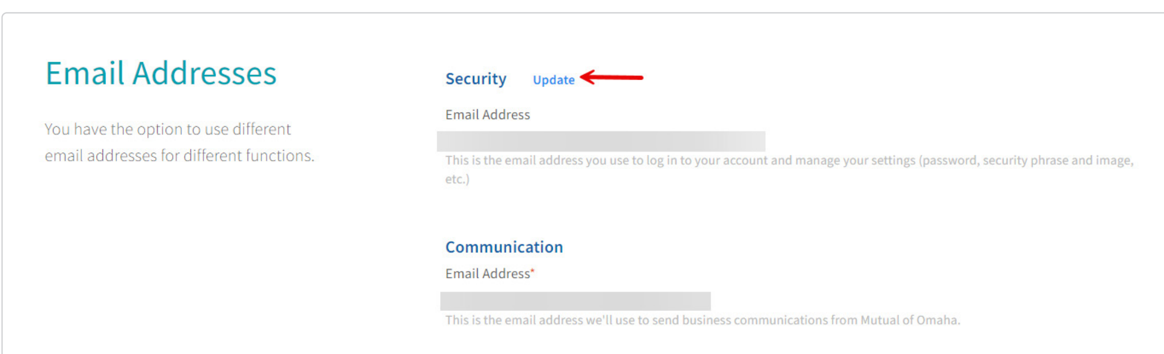
To authenticate using your email address, you must follow the following steps BEFORE you click the Email Authentication Setup button. The email address you have listed on Sales Professional Access is where the authentication email will be sent. There is not an option to enter an email address, for the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



Updating Your Sales Professional Access (SPA) Email Address:

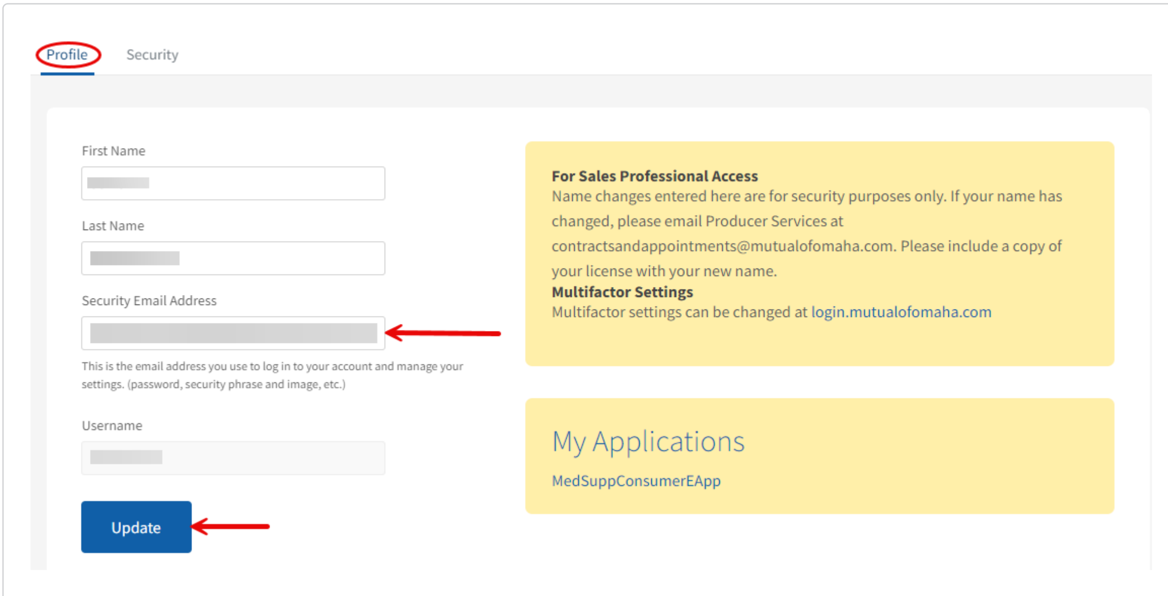
- Log on to Sales Professional Access **(www.mutualofomaha.com/broker)**
- In upper right-hand corner, select image of the person
- Select "Profile"
- Review your information and update as needed
- After the change(s) are made, click "Update"

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

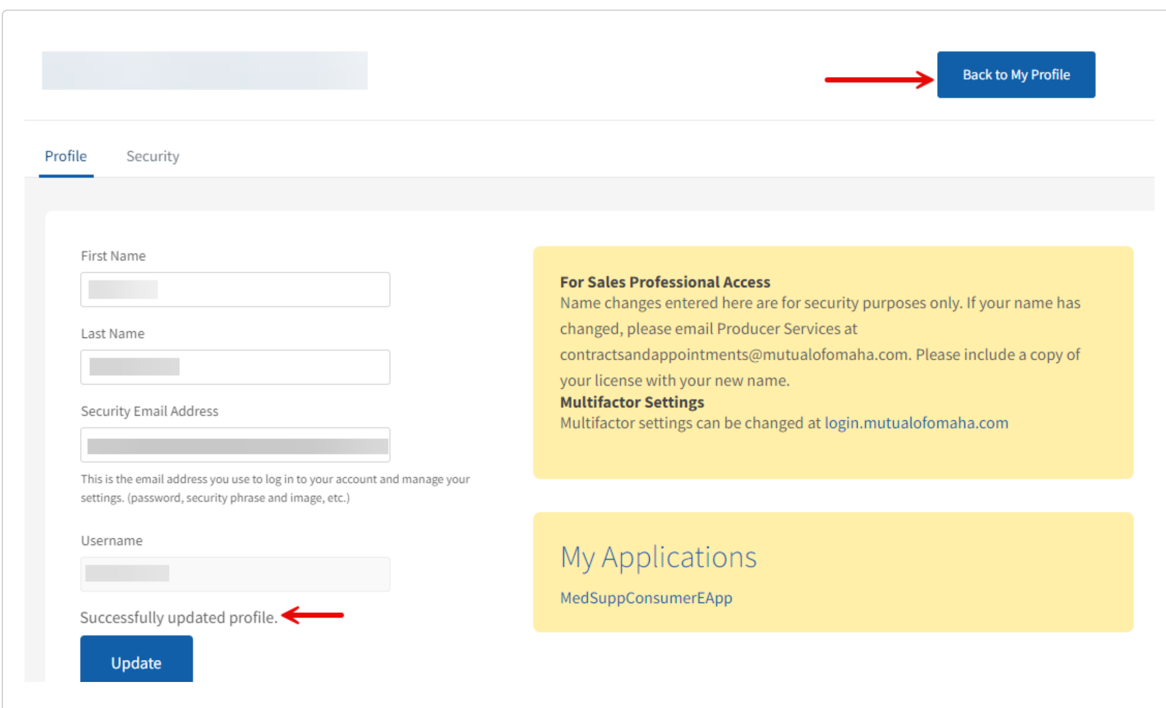


This is your email address that the email authentication will go to. **Please review for accuracy!** If you need to update your email information and have clicked the blue "Update" button, you will be redirected to the "Profile Edit" screen (see image on following page).

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



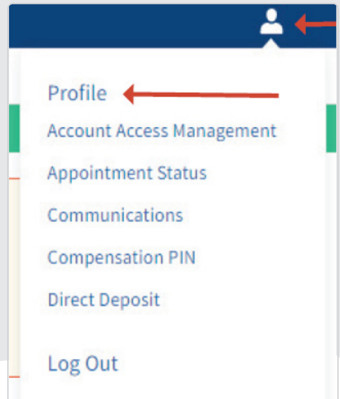
Once you have clicked the "Update" button, you will see a note that says, "Successfully updated profile" located above the blue "Update" button. To go back to your profile, click the blue "Back to My Profile" button.



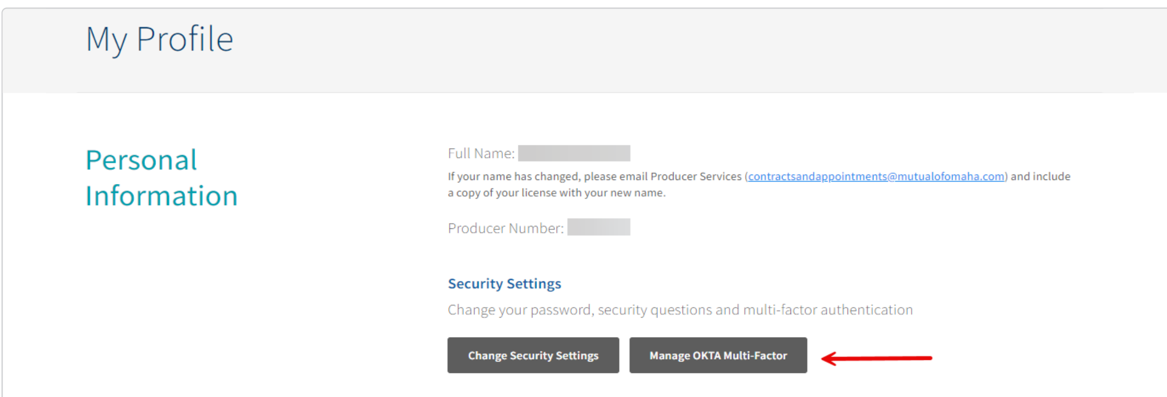
Once you have successfully set up authentication methods, you will receive a confirmation email, regardless of the type of authentication set up, to the SPA email address on file.

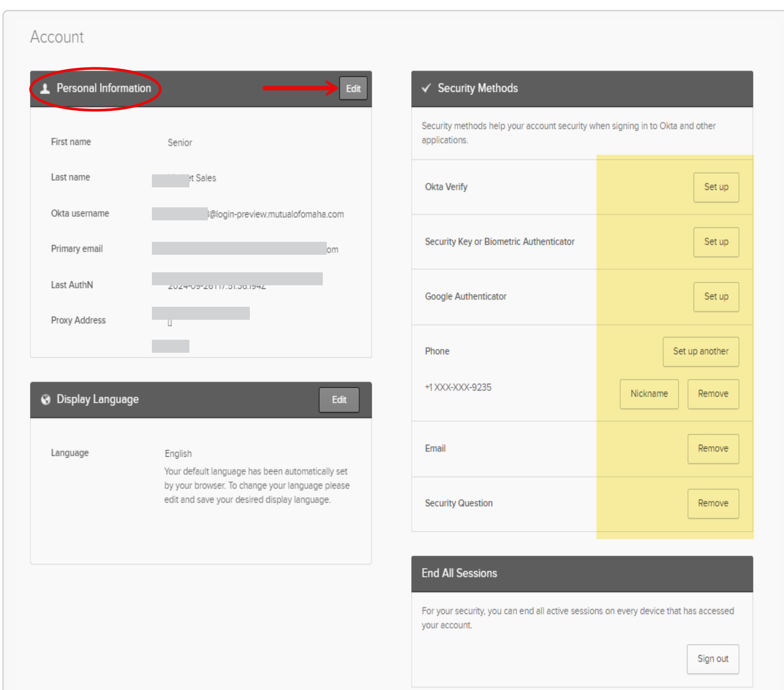
Managing Your Okta Multi-Factor Authorization Methods on Your Dashboard:

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.





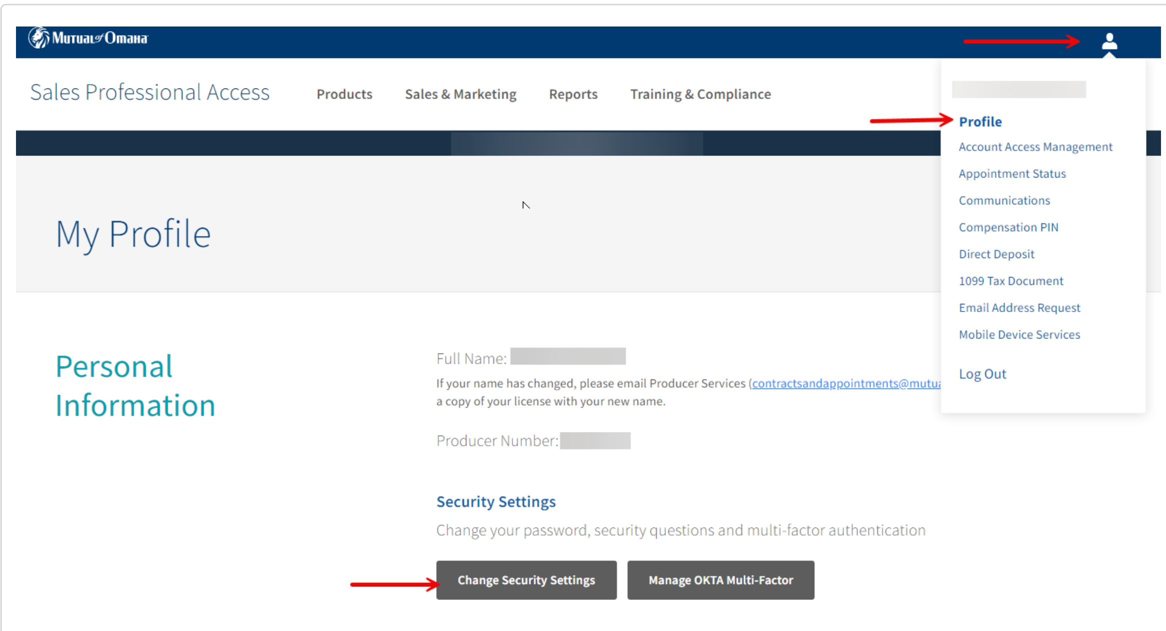
Once you have clicked the "Manage Okta Multi-Factor" button, you will see the "Edit" option on the "Personal Information" box (left image). Here you can select the "Edit" button to update your profile, as well as set up or manage your MFA methods.

Identifying Your Username on SPA or Updating Your Password

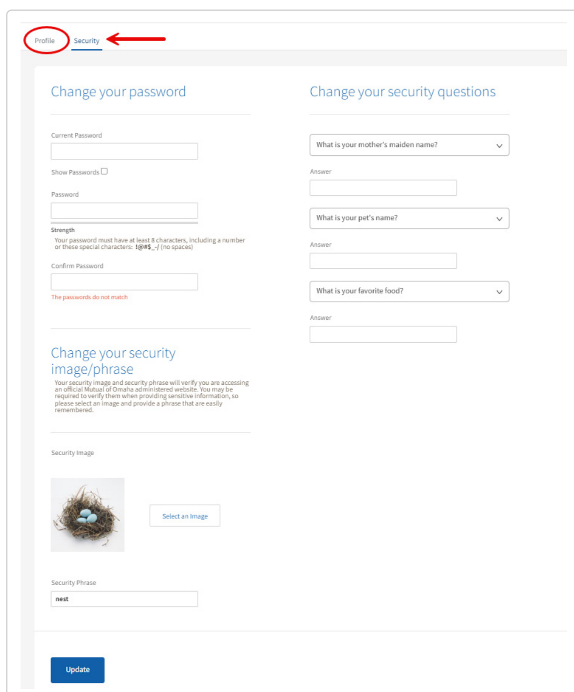
If you are unsure of what your Sales Professional Access username is, it can be identified using the following steps:

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)

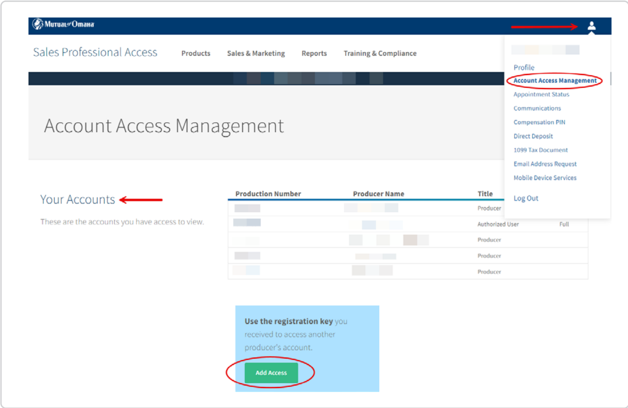
You will need your SPA username, not your email address to authenticate.

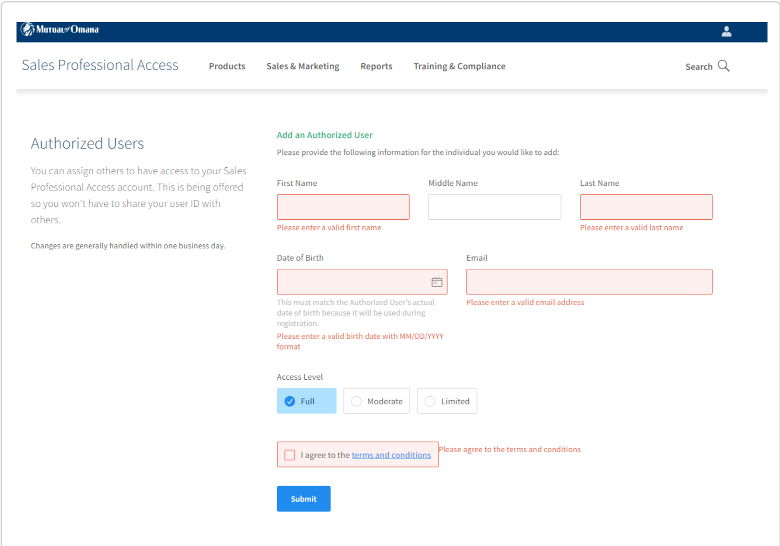
ALL users of SPA need to set up Okta, and you may need to add Authorized Users to your SPA account

- 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





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.**

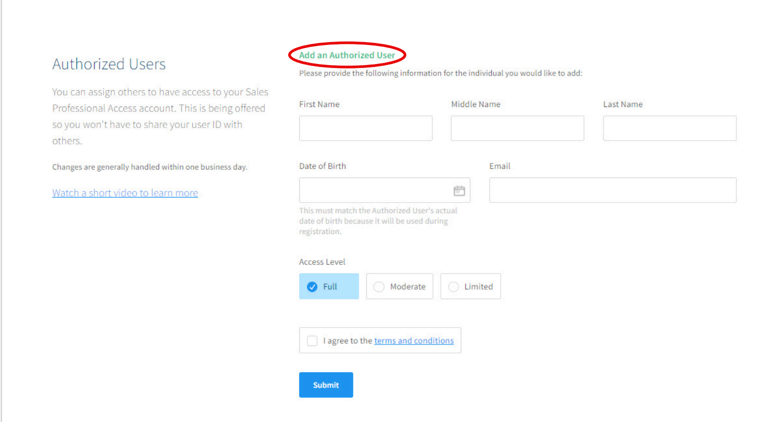
There are three security levels:

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.



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

Next Steps for the Authorized User

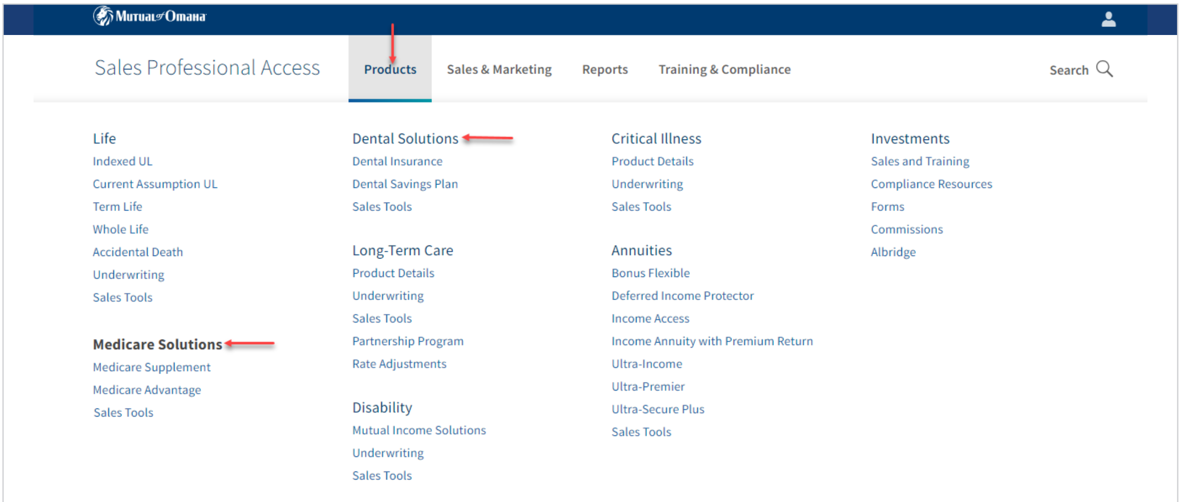
- Once you select "Submit" to add an authorized user, the authorized user will receive an email from Mutual of Omaha to complete the registration process.
- The authorized user should follow the instructions in the email to complete the registration process.

Questions?

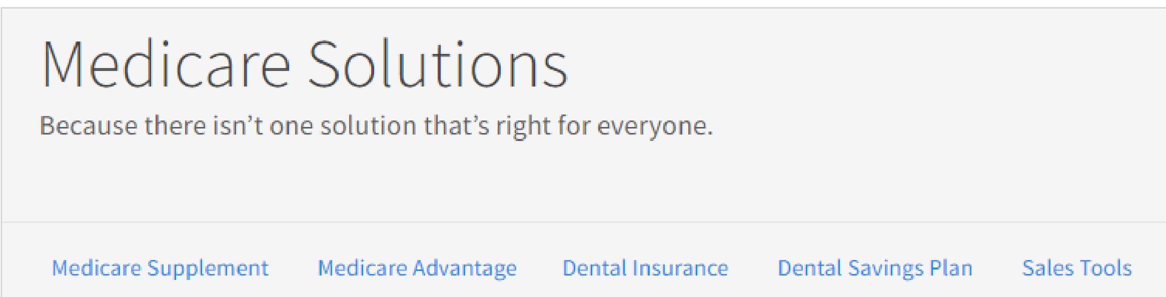
Please call our Field Assistance Center at
800-847-9785

Product Information

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



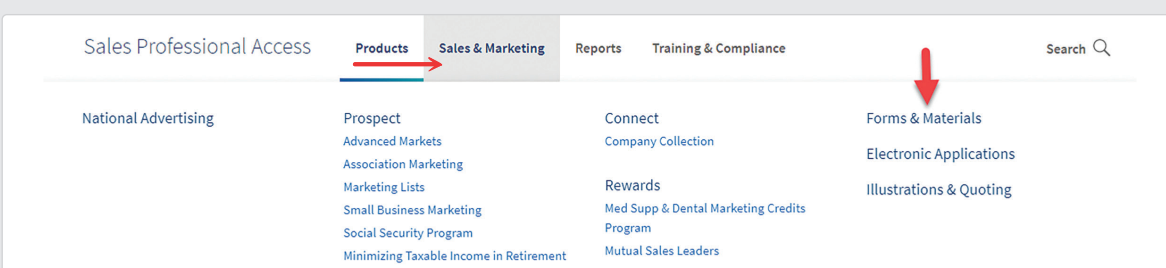
Each tab has additional information on our Medicare Solutions products.



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)

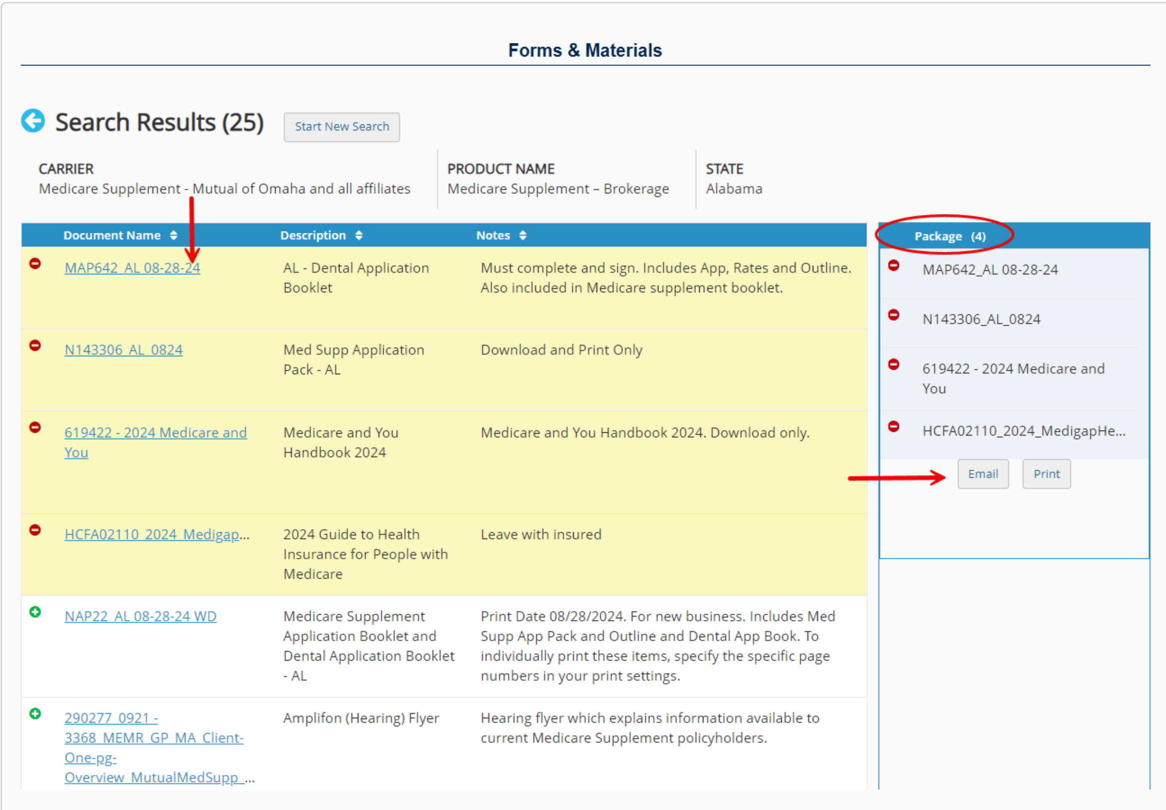
4 Product Type

- 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.



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.

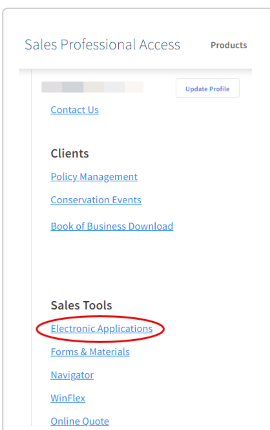
1. Go to your app store
2. Search for “Mutual of Omaha Quotes for Sales Professionals”
3. Install and start quoting!

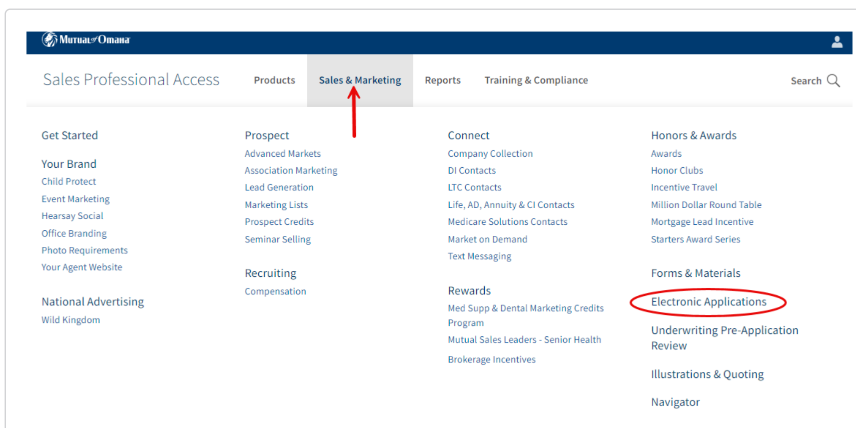
GET IT ON Google Play

Download on the App Store

e-Applications

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



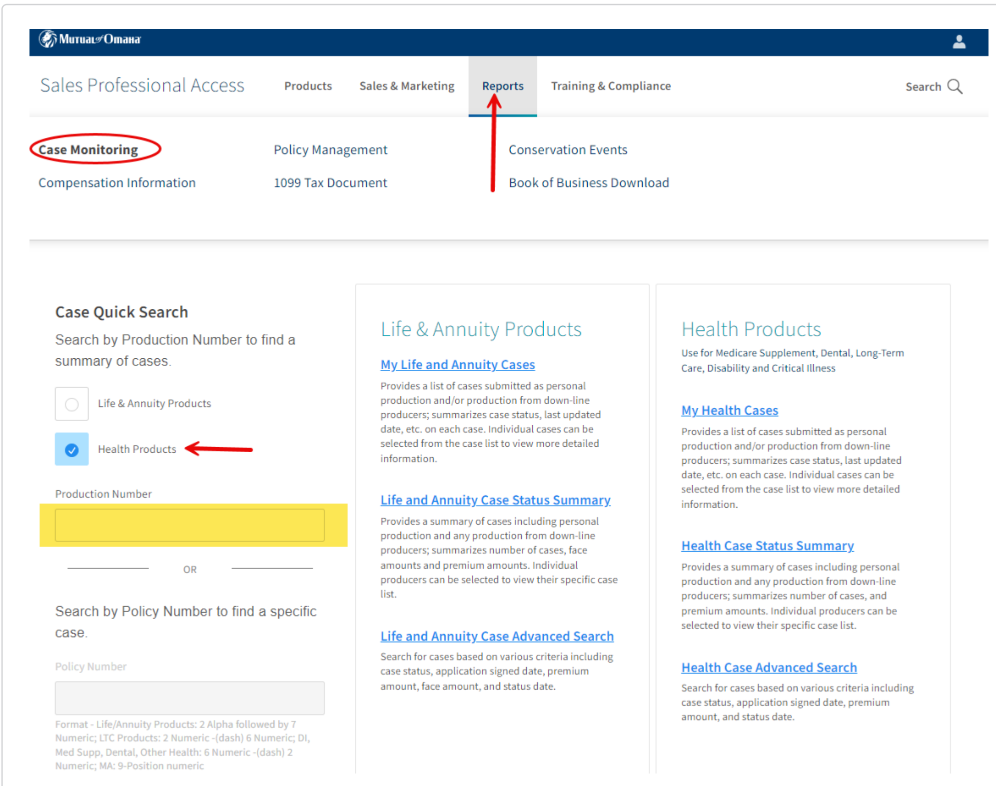


Choose the product you want from the menu on the left hand side. When you are ready to start an e-App, select “Start e-App.” You will also find resources, user guides and a video for the e-Apps.

Reporting

Case Status

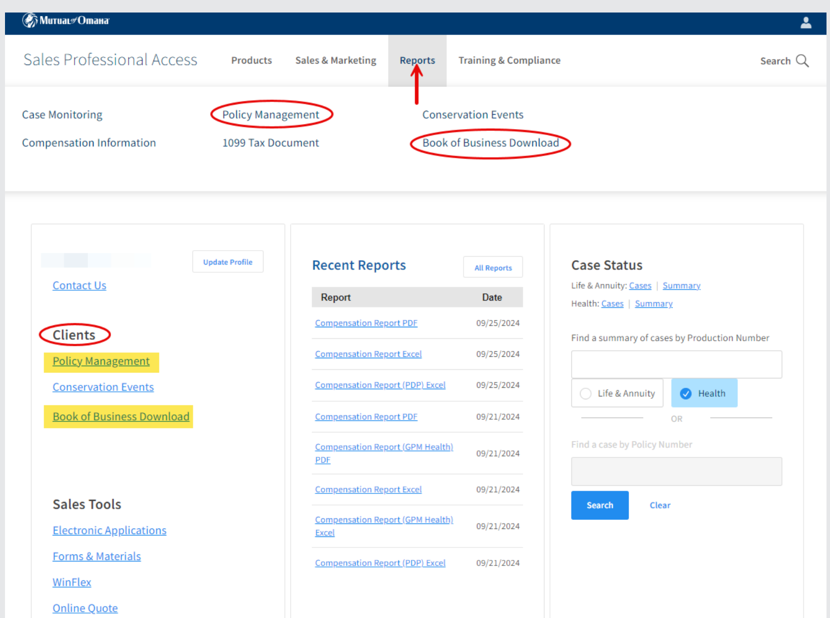
From the “Reports” tab, select “Case Monitoring”. On the left hand side of the screen, select “Health Products” and type in your production number. This will show all cases submitted in the last 60 days and what their current status is. You also have the option within this report to export and/or print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



Policyholder Information

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

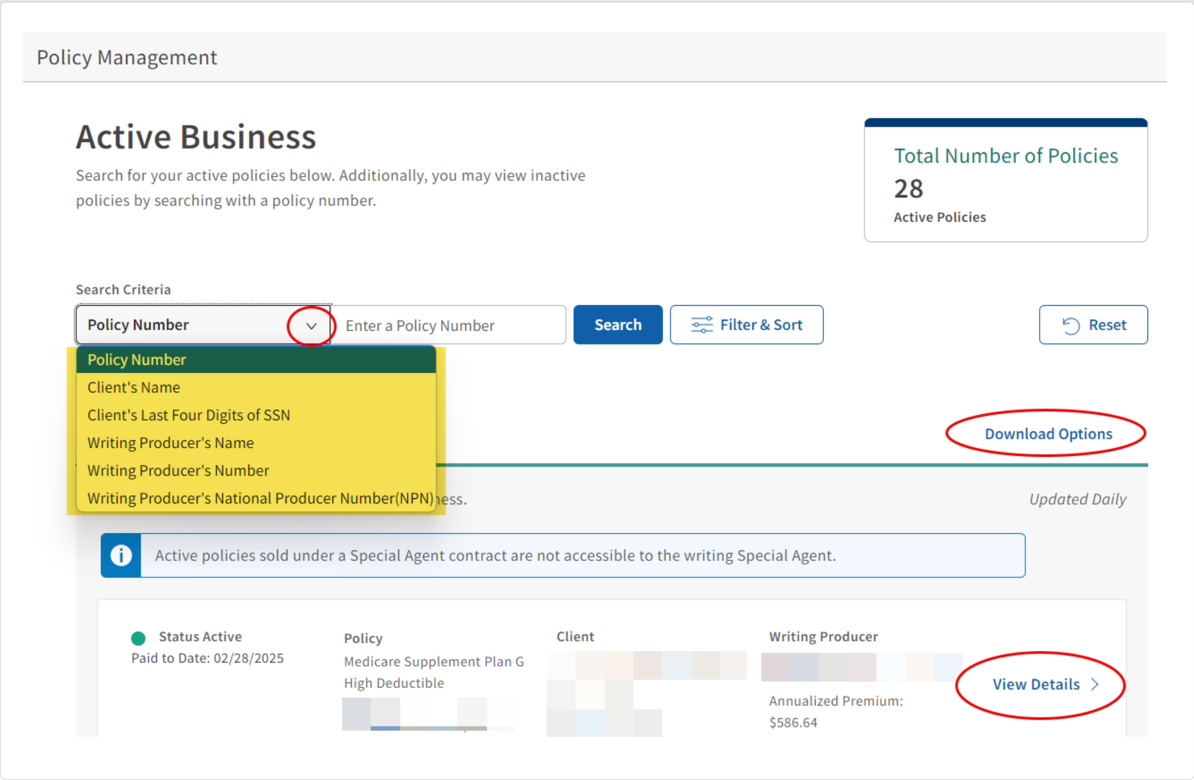
To access cases submitted, click on the “Policy Management” link under the “Clients” portion of your SPA home page. You are also able to view and download policies using the “Book of Business” tool. You can also find these under the “Reports” tab.



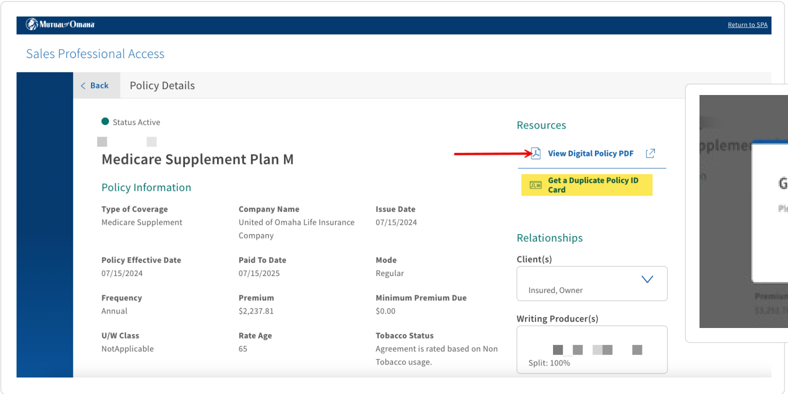
Book of Business Download — Get inforce policy information by downloading your Mutual of Omaha policies you have sold using the Book of Business download. Select the type of policy you are looking for and follow the prompts to receive an Excel file to download with the policy information selected.

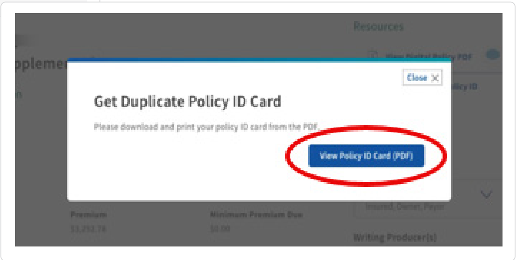
Policy Management Tool — The Policy Management Tool will display inforce policies without having to download a list and gives you quick stats and access to view a PDF of the policy. Use the drop-down menu to search for a specific policy, using the different criteria options. Clicking "View Details" will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



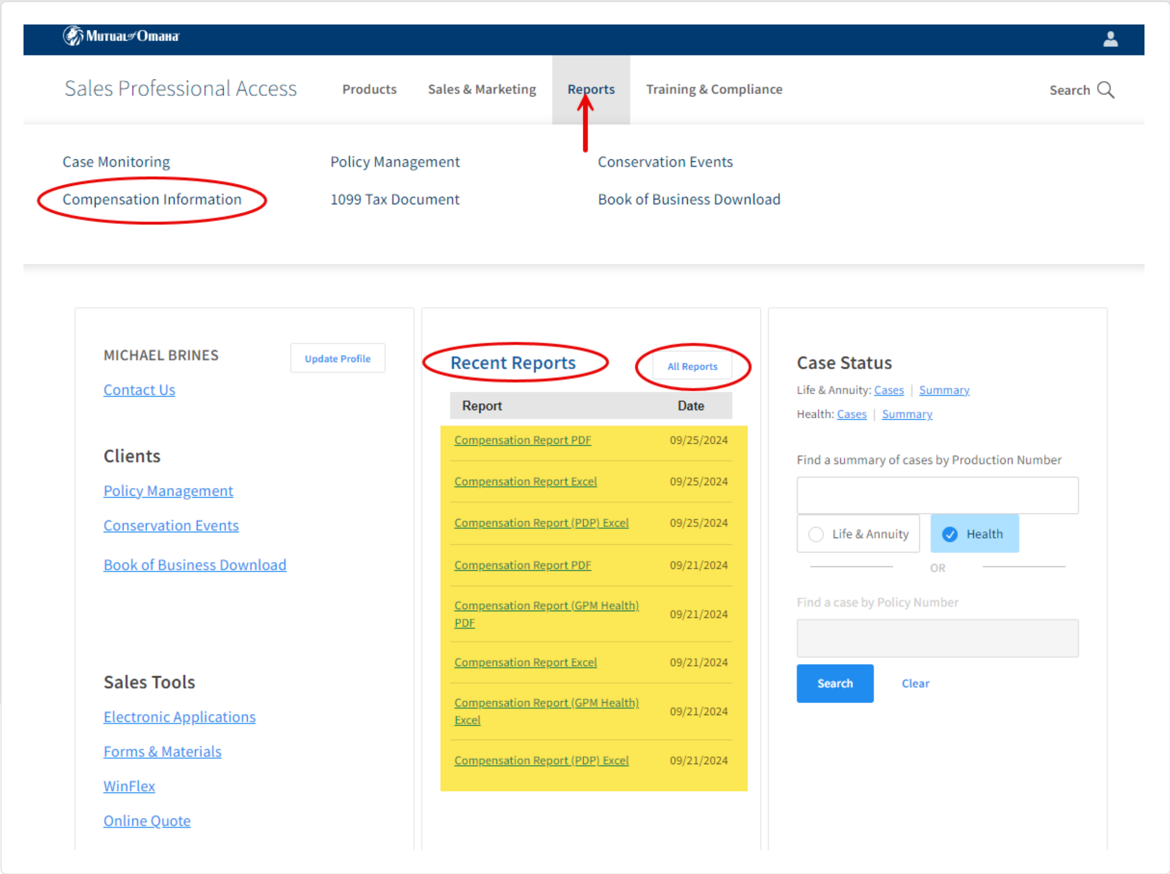
Under the "View Digital Policy PDF" link, you will see a link that says "Get a Duplicate Policy ID Card". By clicking the "Get a Duplicate Policy ID Card" link, you are able to download, print, or email a duplicate PDF version of your policyholder's Medicare supplement policy ID card.





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.



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

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

Notes

Mutual of Omaha