

MEDICARE
SOLUTIONS

GETTING STARTED WITH MUTUAL OF OMAHA

Medicare Supplement | Dental | Prescription Drug Plans

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604161

 **Mutual of Omaha**
Protect Your Kingdom

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Introduction to Sales Professional Access

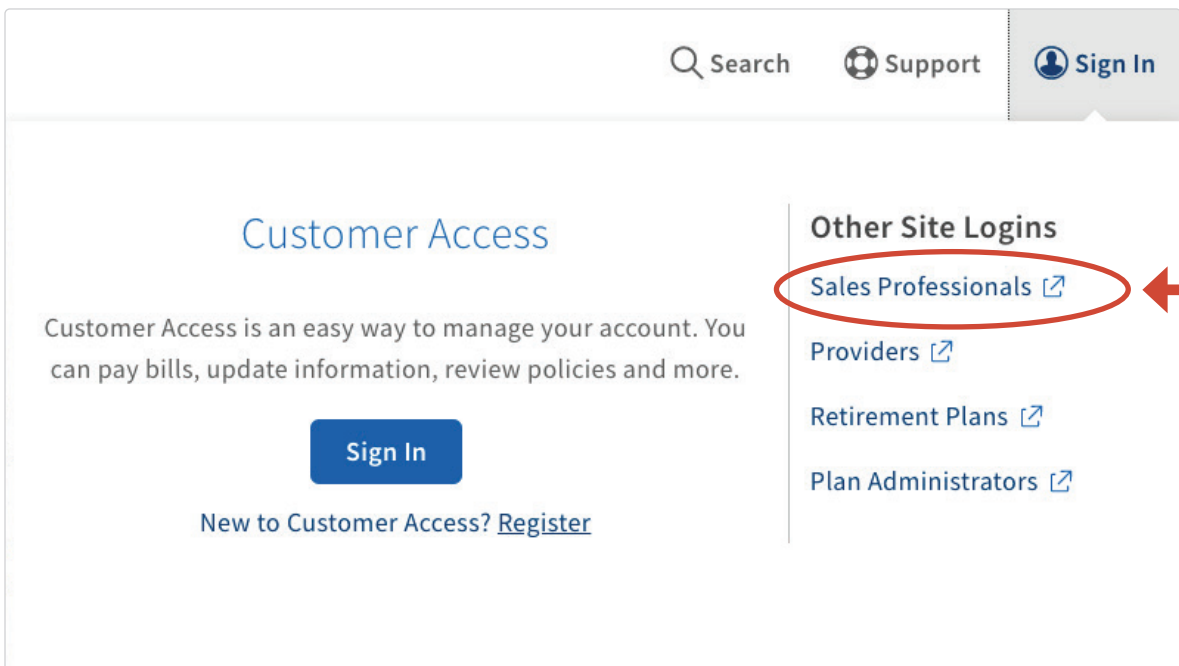
Sales Professional Access (SPA) is your one-stop shop to find all the resources you need at Mutual of Omaha.

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 Chrome or Internet Explorer and enter www.mutualofomaha.com in the address bar.
- 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, select the profile image 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"

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"



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

Let's create your account.

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

First Name

Username

Last Name

Password

Email Address

Strength

Confirm Password

Confirm Email Address

Show Passwords

Protecting your information is important to us.

To help us increase your account's security, please provide the following.

Security Questions

Select an appropriate security question.

Answer

Select an appropriate security question.

Answer

Select an appropriate security question.

Answer

Security Image & Phrase

Your security image and security phrase will verify you are accessing an official Mutual of Omaha administered website. You may be required to verify them when providing sensitive information, so please select an image and provide a phrase that are easily remembered.

Select a security image.

[Select an Image](#)

Please provide a security phrase.

Sign up

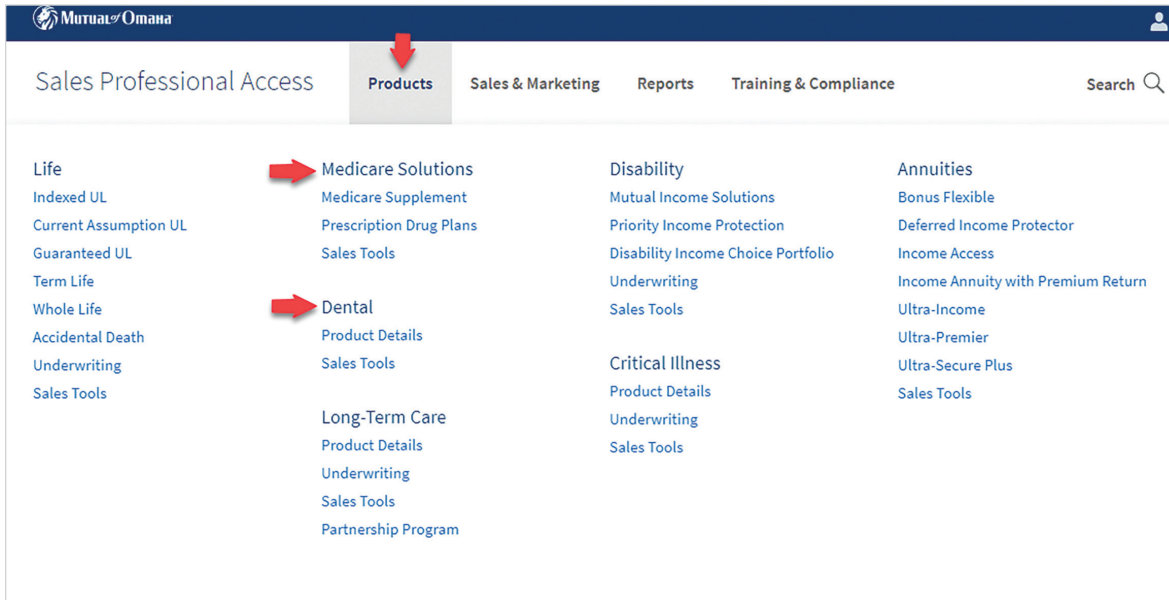
Cancel

You are now registered.

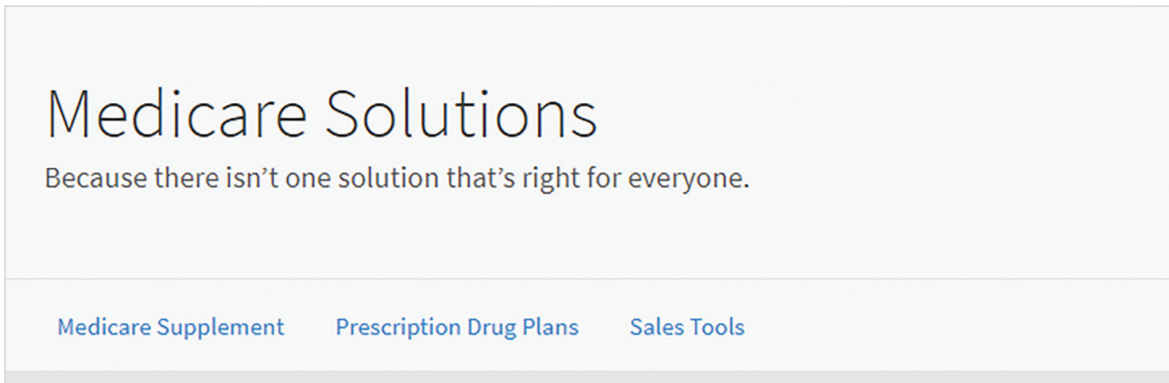
You will be instructed to log in using the username and password you have created.

Product Information

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



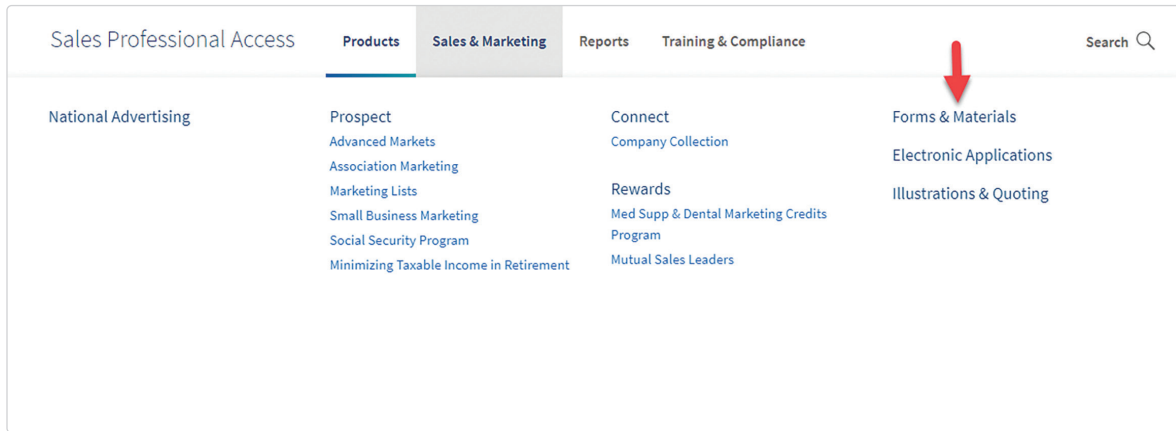
Each tab has additional information on our Medicare Solutions products.



The **Sales Tools** tab helps you learn even more including product education, competitive advantages and 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.



Forms & Materials

Forms & Materials

Basic Search [Search By Form](#)

Company

Service Type

State

Product Type

Product Name

[Reset](#)

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

1 Company

- Medicare Supplement – Mutual of Omaha and its affiliates
- Omaha Health Insurance Company – PDP
- 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 (12) [Start New Search](#)

CARRIER: Mutual of Omaha | PRODUCT NAME: Medicare Supplement - B... | STATE: Arizona [Show Forms Package \(5\) ▾](#)

Document Name ▾	Description ▾	Notes ▾
M166303_AZ	Medicare Supplement Application Packet.	Download and Print only - Not available to order
MAP642_AZ 09-16-20	AZ - Dental application booklet	Must complete and sign. Includes App, Rates and Outline. Also included in Medicare supplement booklet.
453196_MACRA Producer Use Only Flyer	2020 MACRA Flyer	A quick guide to understanding the 2020 Medicare changes. For Producer Use Only.
HCFA02110_2020	2020 Guide to Health Insurance for People with Medicare	Available to order after April 15, 2020 . Leave with insured

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

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

A **B**

← Search Results (12) [Start New Search](#)

CARRIER: Mutual of Omaha | PRODUCT NAME: Medicare Supplement - B... | STATE: Arizona

Document Name ▾	Description ▾	Notes ▾
M166303_AZ	Medicare Supplement Application Packet.	Download and Print only -

C **D**

On the Search Results screen there are several helpful areas:

- A** Click the arrow to modify your current search
- B** Start a new search
- C** A brief description of the material
- D** The notes section provides how and what to use the form/material for

Quoting

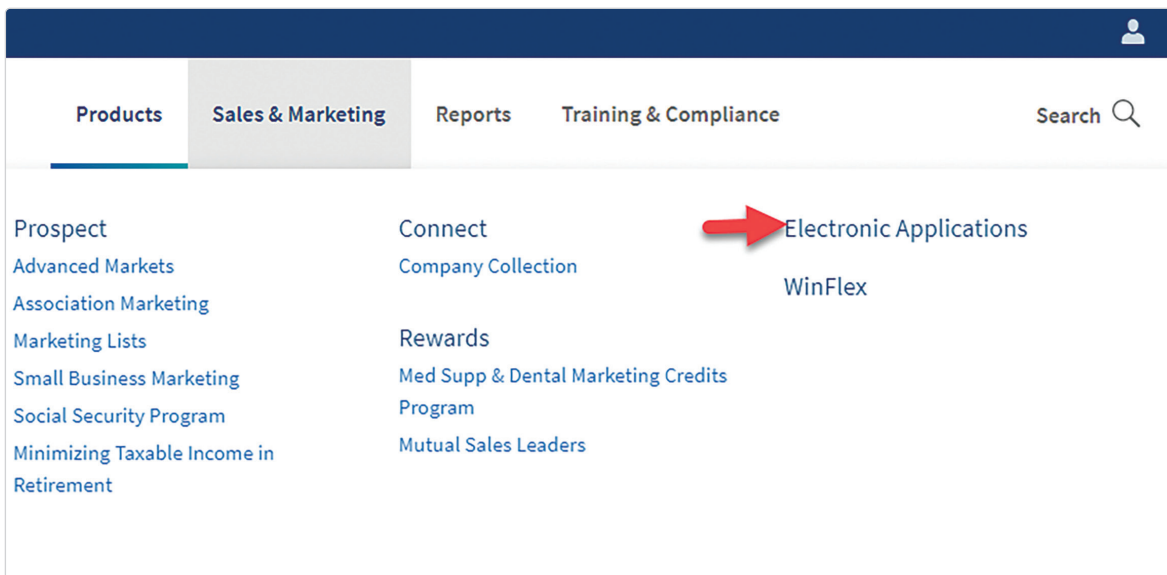
Install our Quotes for Sales Professionals mobile quoting app to your device to provide Med supp and dental insurance rate quotes on the go.

- 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, Prescription Drug Plans 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 and user guides for the e-Apps.

e-Apps Help You Transition to Medicare Solutions Products

At the end of the Med Supp e-App, you have the option to continue directly to the PDP and Dental e-Apps.

Reporting

Case Status

On the right hand side select **"Cases"** under Case Status. 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

If you want to access cases submitted more than 60 days prior click on Policyholder Information under the Clients section.

Clients

[Policyholder Information](#)

Case Quick Search

Search by Production Number to find a summary of cases.

Life & Annuity Products

Health Products

Production Number

OR

Search by Policy Number to find a specific case.

Policy Number

Format - Life/Annuity Products: 2 Alpha followed by 7 Numeric; LTC Products: 2 Numeric -(dash) 6 Numeric; DI, Med Supp, Other Health: 6 Numeric -(dash) 2 Numeric; PDP: 3-position alpha with 9-Position numeric; MA: 9-Position numeric

There are three ways to search for policy information: policy number, first initial and last name, last four digits of your Social Security Number. Select one of these options from the drop down. Once you select a policy you will find full policy and customer information.

Search for a Client

Search by Policy Number

Policy Number ▼

Search

Compensation Information

To find detailed commission statements, select the **Reports** tab. On the Reports page, scroll down to the Compensation Brokerage section to see your latest compensation statements.

Medicare Solutions Contacts

General Contact Information for all Products

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

Prescription Drug Plans Only

Area	Phone Number
Enrollment Status	877-775-1360
General Inquiries for agents only	855-493-1342
Billing Inquiries for members only	877-770-9808 (option 1)
Customer Service for members only	855-864-6797

Application Submissions

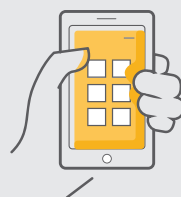
App Type	Med Supp, Dental	PDP
e-Apps	MutualofOmaha.com/broker Select the Electronic Applications link on the home page or on the Sales & Marketing tab.	
Paper Apps Order application books through normal channels.	<p>Mail - Normal Delivery Mutual of Omaha P.O. Box 3608 Omaha, NE 68103</p> <p>Mail - Overnight Delivery Mutual of Omaha Records/Mailing Processing Center 9330 State Hwy. 133 Blair, NE 68008-6179</p> <p>Fax to 866-799-9076 When initial premiums are paid through Automated Clearing House (ACH)</p>	<p>Fax 855-867-6711 This is the preferred method to submit paper PDP enrollment forms.</p> <p>Mail Mutual of Omaha Rx P.O. Box 3625 Scranton, PA 18505-9811</p> <p>We must receive PDP enrollment forms within 48 hours after the signed enrollment date.</p>



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.



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.