

MEDICARE
SOLUTIONS

GETTING STARTED WITH MUTUAL OF OMAHA

Medicare Supplement | Dental | Prescription Drug Plans

TABLE OF CONTENTS

Introduction to Sales Professional Access	3
Setting up Okta	6
Okta Mobile App	6
SMS Verification	7
Voice Call Verification	8
Email Verification	9
OKTA Multi-Factor Authorization Methods	12
Updating SPA	13
SPA Username	15
Okta Dashboard	17
Authorized Users	19
Product Information	22
Forms & Materials	23
Quoting Tool	26
e-Applications	26
Reporting	27
Contacts	28

Introduction to Sales Professional Access

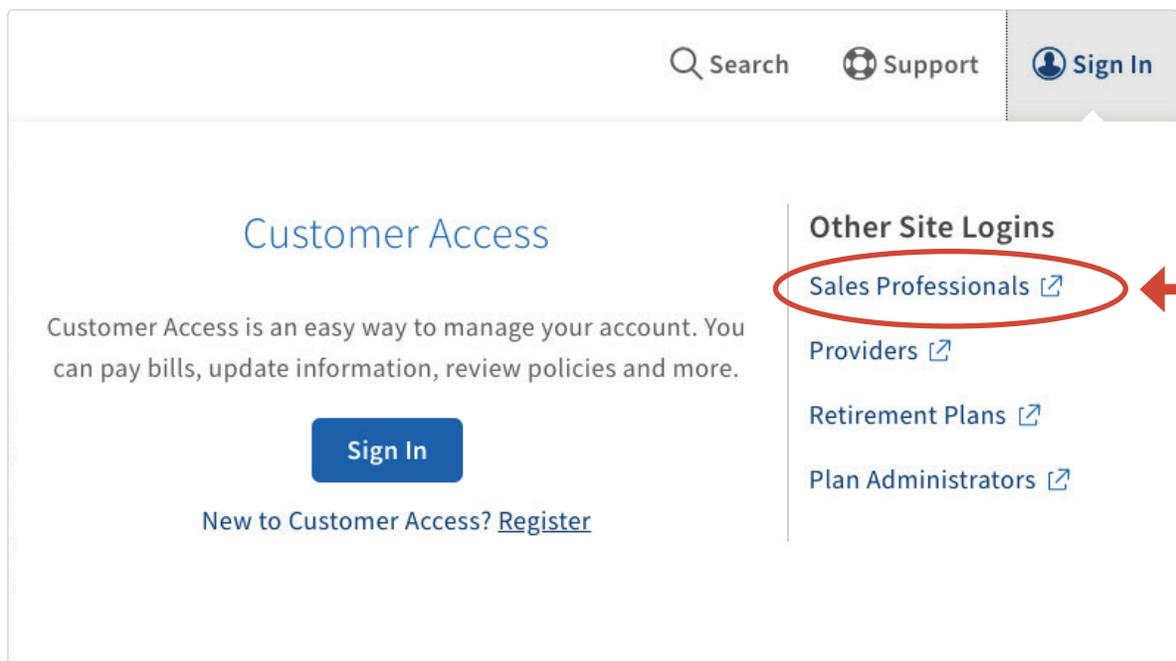
Sales Professional Access (SPA) is your one-stop shop to find all the resources you need at Mutual of Omaha.

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, 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 Email Address

Confirm Password

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

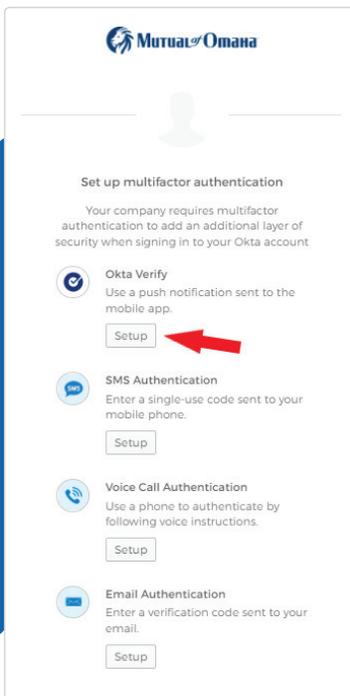
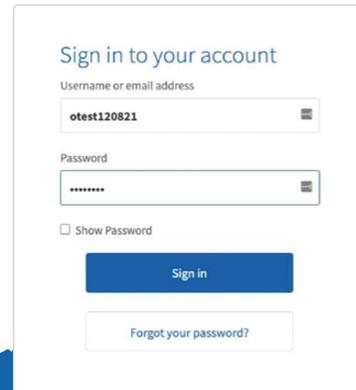
Cancel

**You are now registered 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.

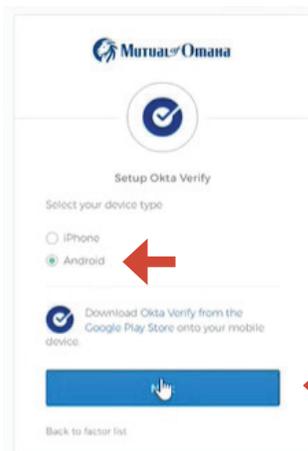
Logging into SPA and Okta is Not Set Up

1. At the SPA login type in your SPA Username or Email Address and Password, then click the Sign In button.
2. After logging in, if you have not set up an Okta Multifactor Authentication (MFA), you will be directed to the below screen.



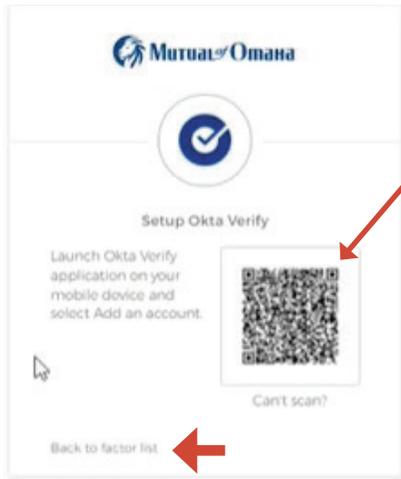
3. Click on Setup next to the MFA you want to set up and follow the setup prompts.
 - Okta MFA Instructions
 - It is recommended that you setup more than 1 MFA.
4. Click Finish and continue to SPA.

How to Download the Okta Mobile Application



To Download/Authenticate with the Okta Mobile Application:

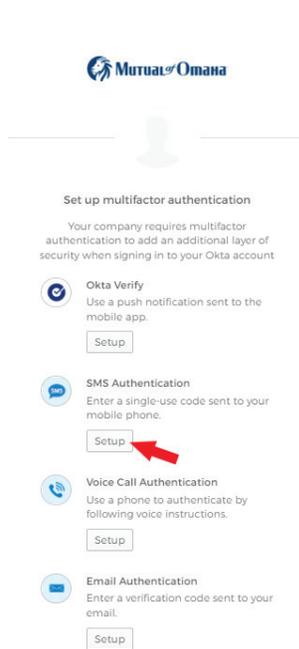
Okta Verify is a mobile app you can download on your device. You will need to click the Setup button under the Okta Verify option. Then you will select your device type (iPhone or Android). You will need to go to the Apple Store or the Google Play Store and download the mobile app (see image below). Once the app has been downloaded to your device, click the blue Next button.



You will then see the screen with a QR code appear. Use your Okta mobile app to scan the QR code to finish the set up for the Okta mobile app authentication.

If you change your mind and want to use a different factor authentication, click the "Back to factor list" link, at the bottom of the QR code screen. This will take you back to the multifactor list (left image shown below).

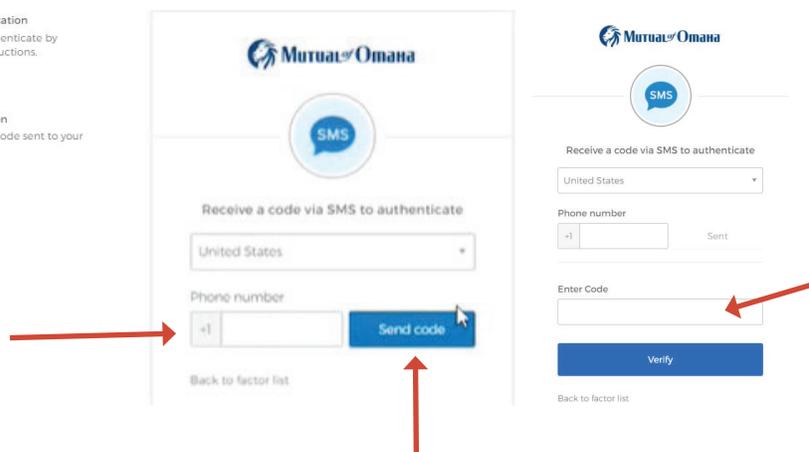
How to Use SMS Okta Authentication



SMS Authentication:

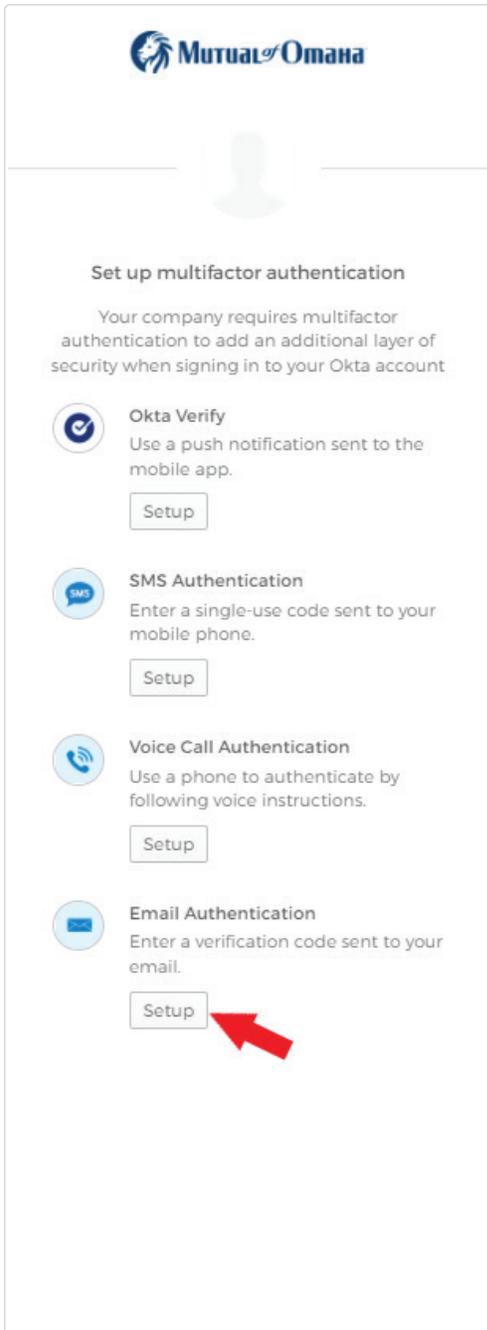
Selecting this option, sends a text message to your phone. On the SMS screen, you will need to enter a phone number, that can receive text messages (see screen below). You will then click the blue "Send Code" button. You will then receive a text with a 6- digit code that will be entered into the authentication screen.

You will then receive a confirmation email confirming this action.



How to Use Email for Okta Authentication

Once you have checked your Sales Professional Access Profile information and updated anything that is needed, you can click the Email Authentication Setup button (shown below).



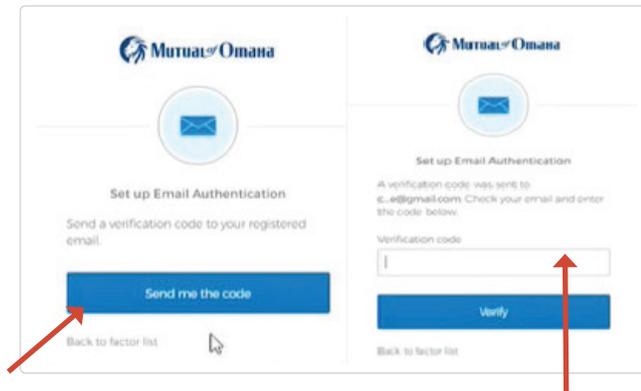
Email Authentication:

Email authentication is one of the most common ways to verify authentication.

STOP!!! If you have not verified your Security email address on SPA, do so before proceeding!

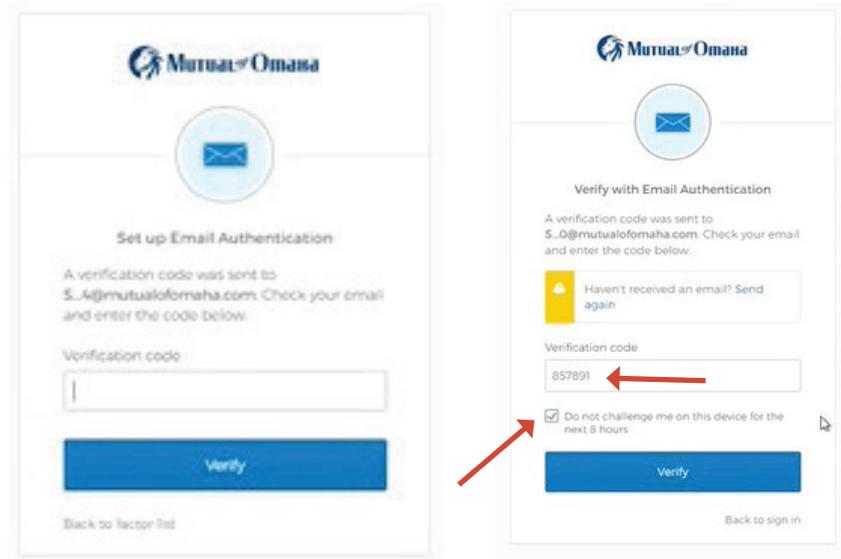
Once you click the Email Authentication Setup button you will be directed to the following screen, where you will click the blue "Send me the code" button (left image shown below).

The next screen will show a verification code was sent to the indicated email address. This is the email address listed on Sales Professional Access. If you see the email address is incorrect, you will need to go to the "Updating Your Sales Professional Access (SPA) Email Address" on the previous pages of this guide. Once updated, you will have to log out of Okta by closing out of browser, reopen, and log back in, using your credentials. Your email address should now be updated/correct on the verification code sent screen (see right image below).

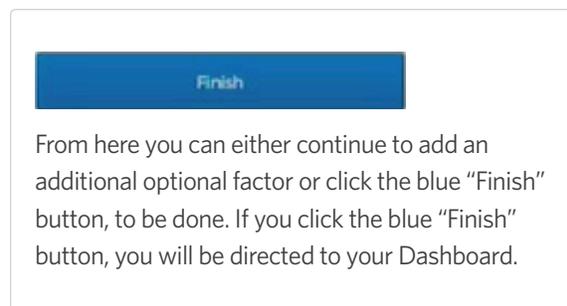
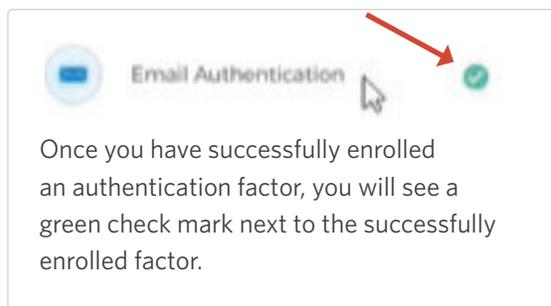
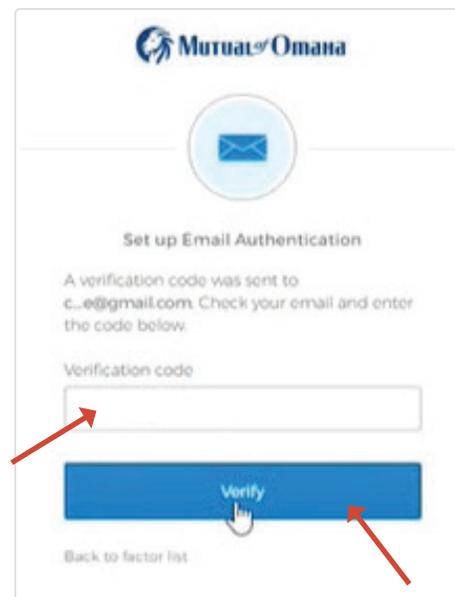
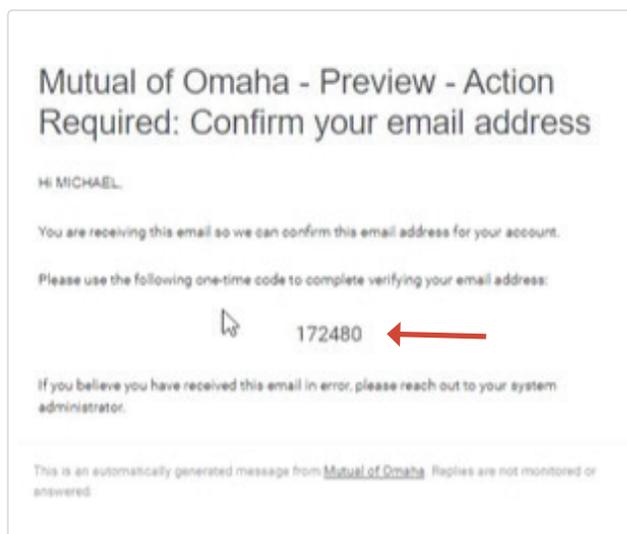


This is the email address that is used on SPA.

If anytime you log in and do not receive your email with the code, there will be a link to have the code sent again by clicking the "Send again" link (see below). You can also opt to "Not challenge me on this device for the next 8 hours", by clicking the empty box, below the verification code.



Check your email inbox for an email from the sender "External Production". Click on the email and you will see a similar screen. This email contains a special verification code (left image shown below). You will then input that 6-digit code from your email into the empty verification code box and click the blue "Verify" button (right image shown below).



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 (see images below).

From: External Production <noreply.login@login.mutualofomaha.com>
Date: February 25, 2022 at 2:03:35 PM CST
To:
Subject: MFA Factor Enrolled



Hi

A multi-factor authenticator has been enrolled for your account

Details

SMS Authentication 

Friday, February 25, 2022

Council Bluffs, Iowa, United States

Performed by:

Don't recognize this activity?

Your account may have been compromised; we recommend reporting the suspicious activity to your organization.

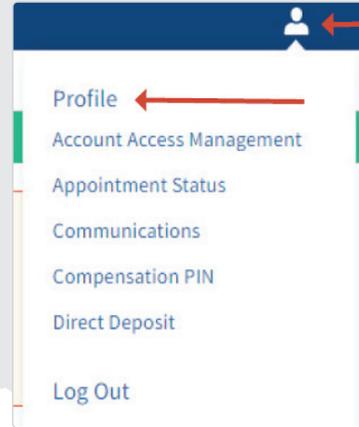
[Report Suspicious Activity](#)

The security of your account is very important to us and we want to ensure that you are updated when important actions are taken.

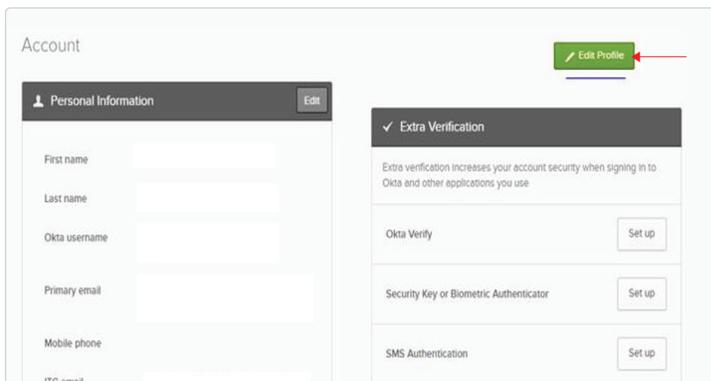
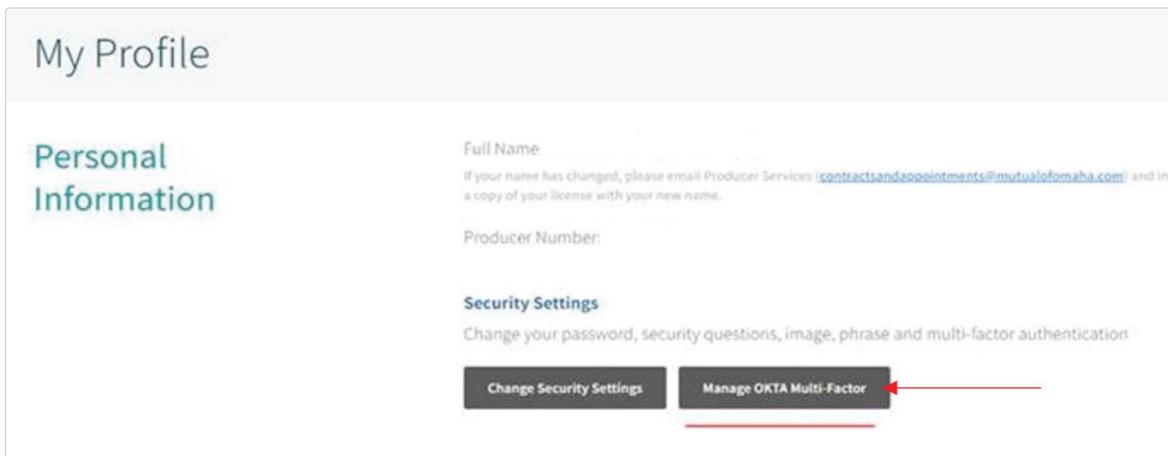
This message was automatically generated by [Mutual of Omaha](#) on Friday, February 25, 2022, at 8:03:32 PM UTC. Replies are not monitored or answered.

Managing Your OKTA Multi-Factor Authorization Methods:

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.



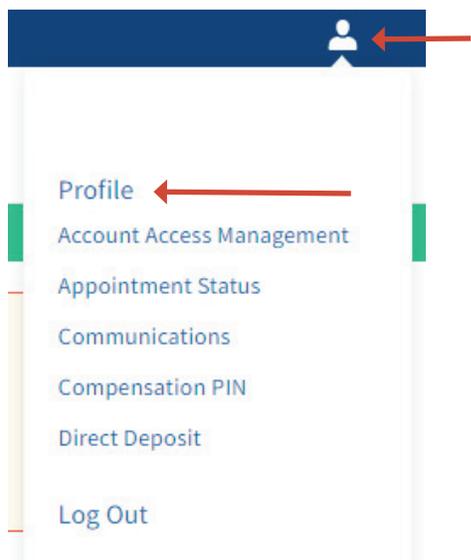
You will then have the option to click the box "Manage OKTA Multi-Factor" linking you to the Okta Dashboard, where you can edit and update your information, as well as manage your Okta MFA methods.



Once you have clicked the "Manage OKTA Multi-Factor" button, you will see the Edit Profile screen (left image). Here you can select the green "Edit Profile" button to update your profile, as well as set up or manage your MFA methods.

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

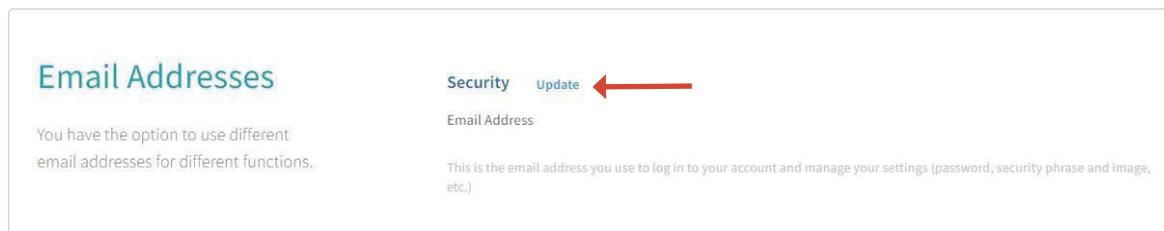
To authenticate using your email address, you must follow the following steps **BEFORE** you click the **Email Authentication Setup** button. The email address you have listed on Sales Professional Access is where the authentication email will be sent. There is not an option to enter an email address,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



Email Addresses

You have the option to use different email addresses for different functions.

Security Update

Email Address

This is the email address you use to log in to your account and manage your settings (password, security phrase and image, etc.)

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 the 'Profile Security' page. At the top left, the 'Profile' tab is selected and circled in red. Below it are input fields for 'First Name', 'Last Name', and 'Security Email Address'. A red arrow points to the 'Security Email Address' field. Below this field is a note: 'This is the email address you use to log in to your account and manage your settings. (password, security phrase and image, etc.)'. Below the note is a 'Username' field, also highlighted in yellow with a red arrow pointing to it. At the bottom left, a blue 'Update' button is circled in red. 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 'My Applications' section with a link to 'MedSuppConsumerEApp'.

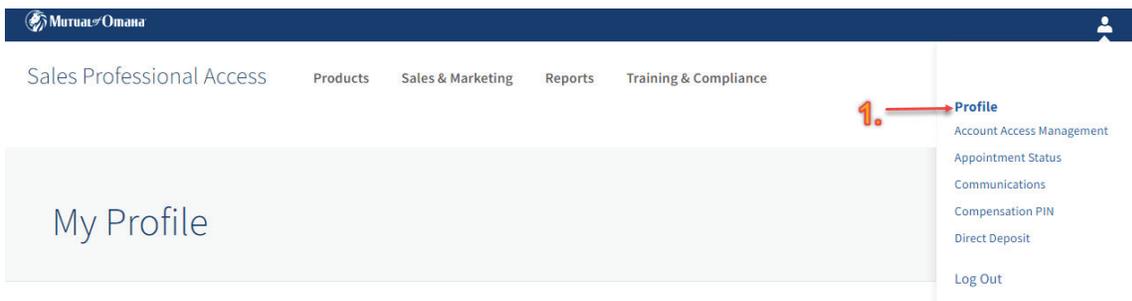
Once you have clicked the "Update" button, you will see a note that says, "Successfully updated profile." This will appear right above the blue "Update" button. At this time, you can click the "Back to My Profile" button at the top of the screen (see below).

The screenshot shows the 'Profile Security' page after a successful update. At the top, the Mutual of Omaha logo is visible on the left, and a blue 'Back to My Profile' button is circled in red on the right. Below the logo, the 'Profile' and 'Security' tabs are visible. The main content area shows the same form fields as the previous screenshot, but they are now disabled (grayed out). A yellow message box is positioned above the 'Update' button, indicating a successful update. The 'My Applications' section remains visible on the right.

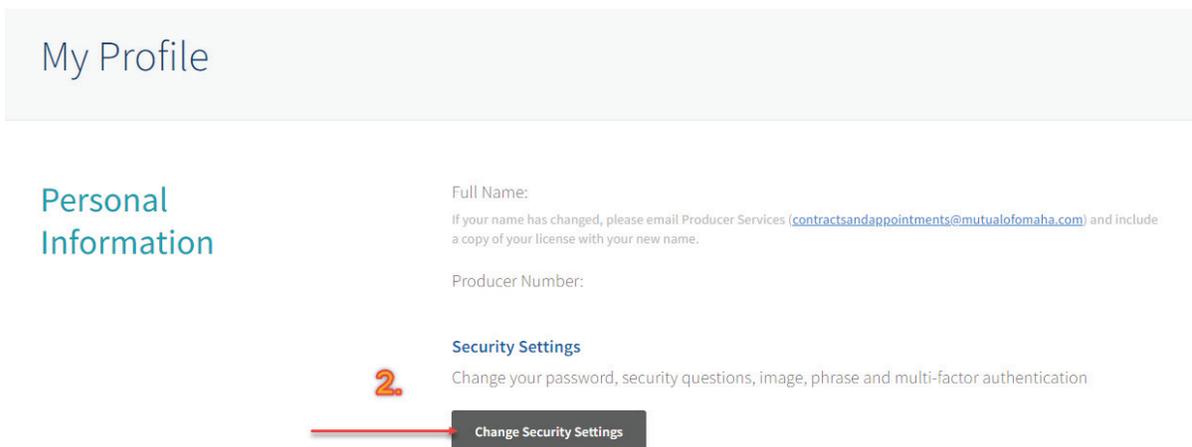
Identifying Your Username on SPA or Updating Your Password

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

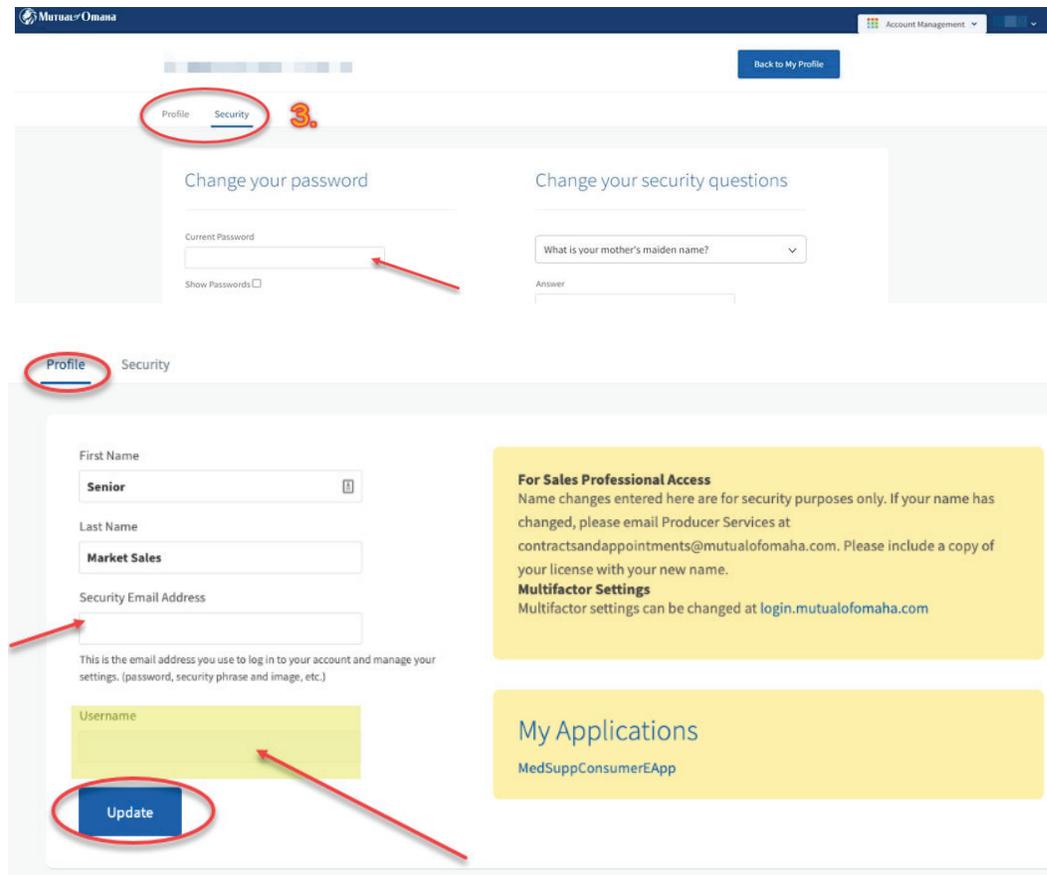
1. Click the person image in the top righthand corner of your screen, then select Profile.



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.

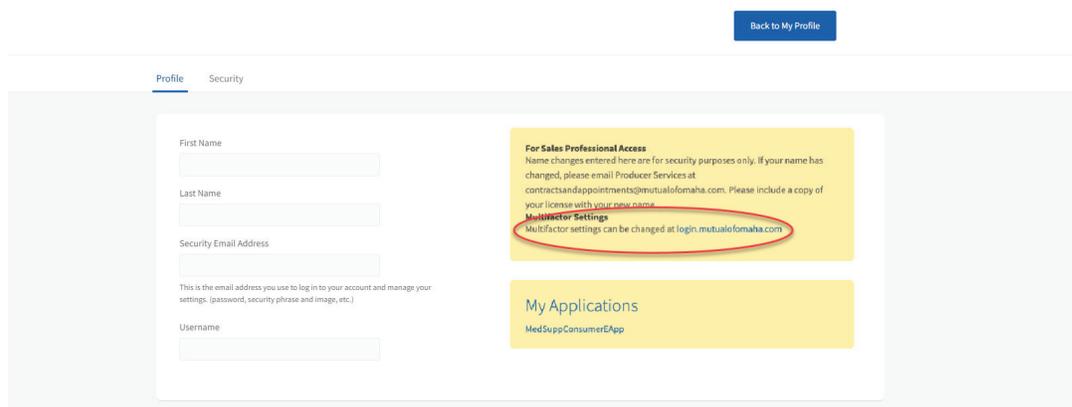


3. This screen will show your Profile and Security settings. On the Security screen, you can change your password, security questions, email address, and identify your user name.



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

If you would like to manage your Okta Multifactor Authentication Methods, click the link on your Profile tab. Following this link will take you to your Okta Dashboard.



Okta Dashboard Information

Dashboard:

Note: At this time, your Dashboard on login.mutualofomaha.com will only be used for Multifactor Authentication management. There will not be any applications assigned. You should continue to access your Mutual of Omaha applications the way you always have, through Sales Professional Access (SPA).

You can set up additional authentications through your dashboard, edit information, add a secondary email address. Please see following page for Dashboard views (see below images).

Dashboard Overview

The screenshot displays the 'Account' dashboard. The 'Personal Information' section is highlighted with a dark header and an 'Edit' button. Below this header are fields for First name, Last name, Okta username, Primary email, Secondary email, and Mobile phone. A red arrow points to the 'Edit' button. Below the Personal Information section is the 'Security Image' section, which includes a 'Save' button. A red arrow points to the 'Save' button. Below the Security Image section are fields for Primary email, Secondary email, and Mobile phone. A red arrow points to the Secondary email field.

To set up a secondary email, click the "Edit" button on the Personal Information header. You will then be able to add a secondary email address. Once complete, click "Save" at the bottom of the Personal Information section. When you add a secondary email, you will receive an email letting you know your email changed from 'null' to the address you entered in the secondary email address field.

Note: This is not your primary email address information that is being changed. Your primary email address will remain the same.

Account

Personal Information Edit

First name

Last name

Okta username

Primary email

Secondary email

Mobile phone

Display name

Individual Flag

Save

Security Image Edit

Your security image gives you additional assurance that you are logging into Okta, and not a fraudulent website.



Dashboard Overview:

Update account information, your security image, or display language by clicking the grey "Edit" button in the corner of each section (image to left).

You can set up extra verification by clicking the "Set Up" button to the right of the verification types. Then follow the instructions in this guide to continue setting up authentications. You can also remove and manage your types of verification from here.

Extra Verification

Extra verification increases your account security when signing in to Okta and other applications you use

Okta Verify	Set up
Security Key or Biometric Authenticator	Set up
SMS Authentication	Remove
Voice Call Authentication	Set up
Email Authentication	Remove

How to Add an Authorized User on SPA (optional)

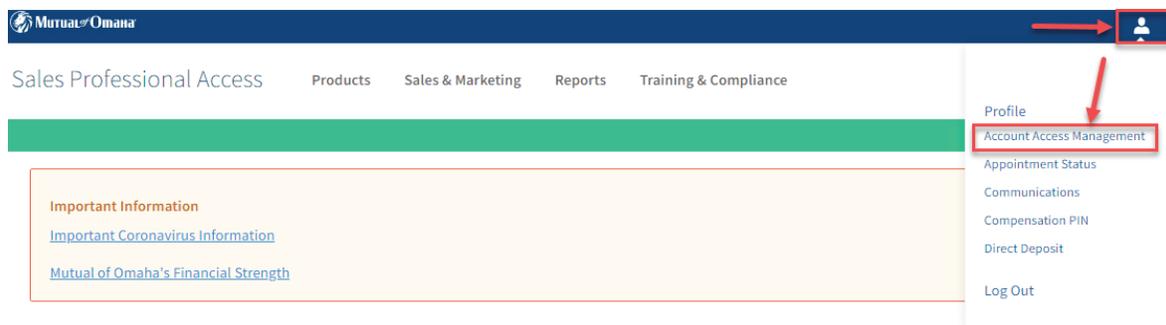
- You will need your SPA Username, not your email address to authenticate
- Select the “Account Access Management” link from the drop-down menu
- Determine the access level for each authorized user
- Add authorized user(s) by completing the required fields

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

- 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 prior to February 24, 2022
- Select the PROFILE image in the upper right-hand corner and select **ACCOUNT ACCESS MANAGEMENT** from the drop-down



Determine the Access Level each Authorized User should be granted

- You can select the level of access each Authorized User has on SPA
- 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:

To customize which level of access authorized users have.

	Full Access	Moderate Access	Limited Access
Appointment Status	✓	✓	
Case Monitoring	✓	✓	✓
Communications	✓	✓	
Compensation Reports	✓		
Policy Conservation Opportunity Report	✓	✓	
Policyholder Information	✓	✓	
Direct Deposit	✓		
Field Persistency	✓	✓	
Field Placement	✓	✓	
Profile	✓	✓	

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 receives 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

Jane Jones,

John Smith has granted you permission to view their account in Sales Professional Access. Use the registration key below to complete the setup process.

Registration Key: {\$key}

(Expires in 30 days)

New to the website?

Create your personal account using the key above.

Create Account

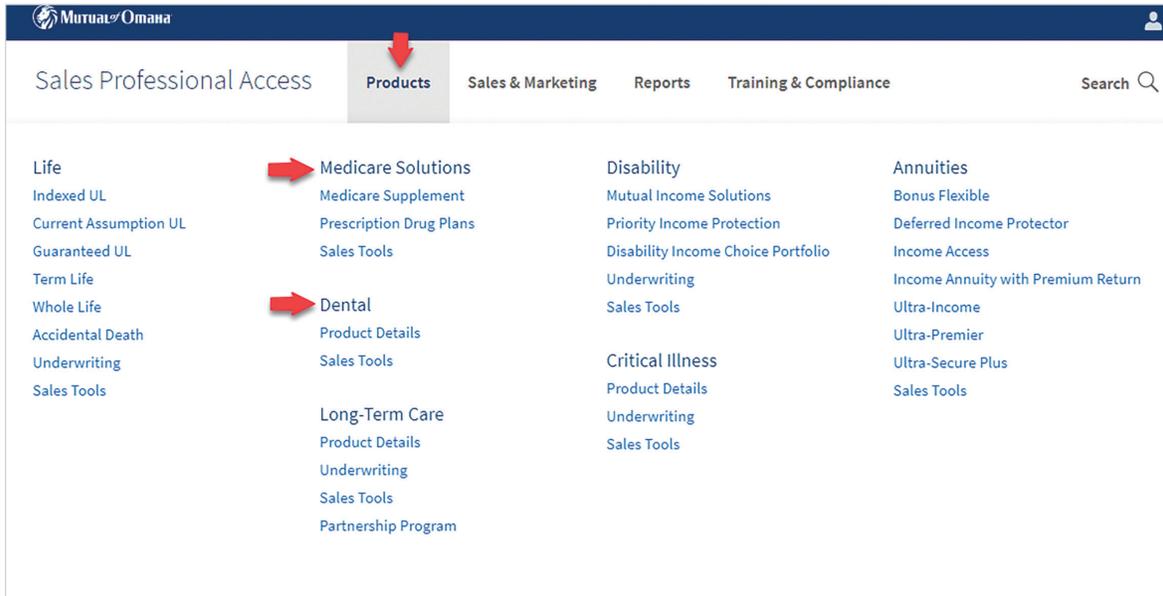


Questions?

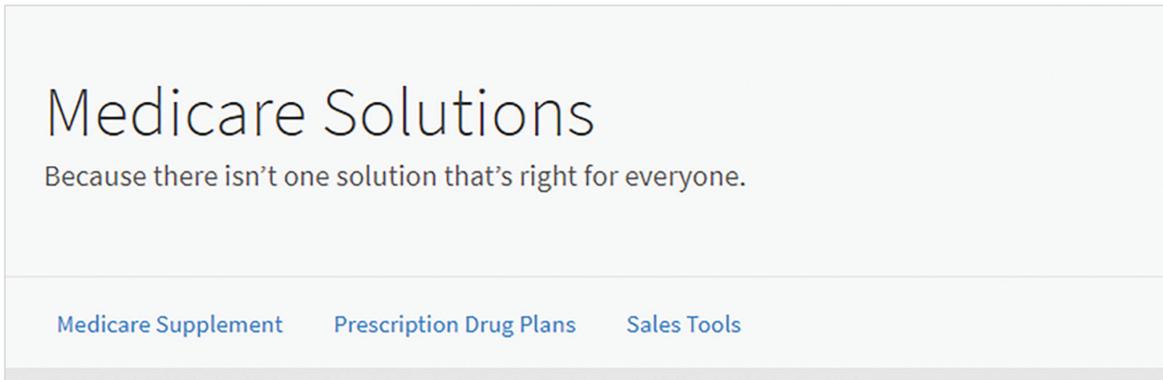
Please call our Field Assistance Center at
800-847-9785

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 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

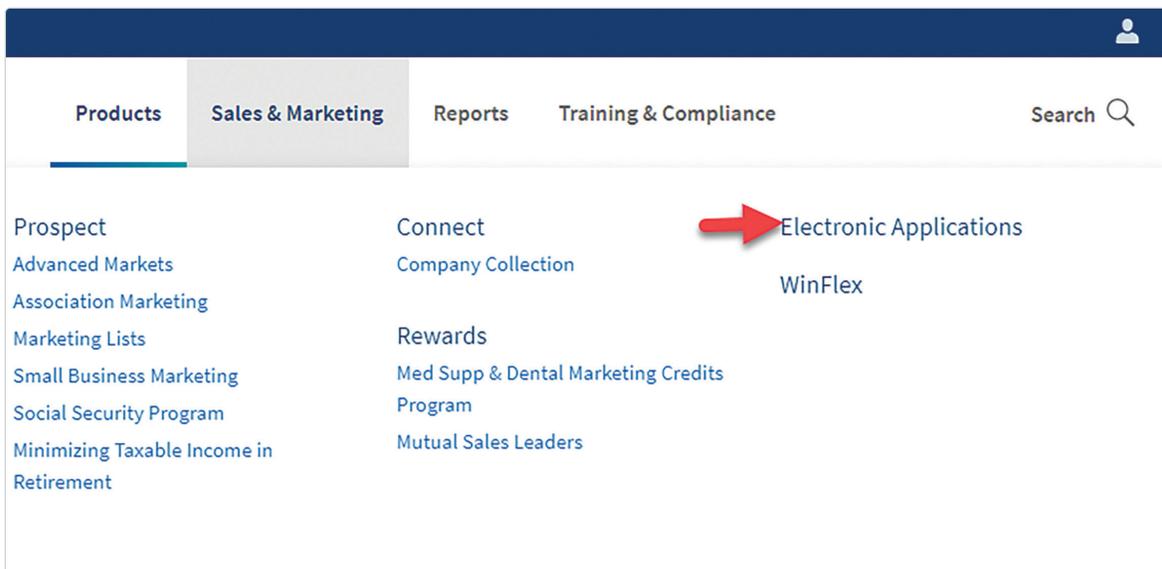
Install our Quotes for Sales Professionals mobile quoting app to your device to provide Med supp and dental insurance rate quotes on the go.

- 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	Prescription Drug Plan
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.

