

Introduction

When you log in to Less Annoying CRM (LACRM) the system will default to your Workspace or your Homepage. On the left-hand side of the screen, you will see several icons.



Search

Search – If you have entered contacts already, this is where you can search by name or phone number.



Add

Add – This is where you can add a new contact or company with the applicable information.



Workspace

Workspace – This is your homepage where you can see your tasks for the day and upcoming events.



Contacts

Contacts – If contacts are added, this will show you the most recent contact.



Calendar

Calendar – You can see a full month of tasks or events, along with contacts birthdays, policy application dates and effective dates that you have entered.



Reports

Reports – Quickly and easily filter for policies or lead status (Advanced Course)



Help

Help – You can access several training videos to assist you in using this platform.

Definitions

- Contact – Anyone you have talked to and you want to keep track of. Like someone T-65, Contacts at carriers, Dept of Ins, and Vendors (Business cards, or printing supplies)
- Company – Aetna, Blue Cross, Humana, UHC, you can add the websites for certs, log in information for enrollments, email address for customer service, and ordering kits.
- Prospect – someone you've talked to that is not eligible for Medicare yet but you want to stay in contact with
- Qualified Lead – Someone who has Medicare Parts A & B and is within a valid election period where they can be written.
- AEP Prospect – Someone you talk to mid-year who already has Medicare but not a valid election period and you will follow up with during AEP.
- Employer Group Health Plan (EGHP) Past 65 – Someone who is still working and has group coverage, delaying Medicare. Will need CMS L-564 & CMS 40B.

Chapter One

Adding individual Contacts/ Bulk Imports

+ Add new records

Add a single record

-  Contact
-  Company
-  Task
-  Event
-  Policy
-  Lead

Import in bulk

-  Import contacts
-  Import calendar
-  More import options

You do not have to enter clients one at a time. See Christina for this option.

★ Here is where you go to manually enter in a new contact, someone who calls or emails you and you want to create a file for them with their contact information.

The bulk import would be for your existing book of business.

Import from a spreadsheet ×

Step 1: Ensure that your file is properly formatted for importing

This import tool is designed to guide you step-by-step through your import process, but your spreadsheet does need to meet some basic formatting requirements for the CRM to be able to read it. Take a minute and review your file, making sure that it's neatly organized with one contact/company per line, one piece of information about each contact/company per column, and headers for each column of data in the very first row of the sheet.

Top row with column names

One row per contact

	A	B	C
1	First Name	Last Name	Phone Number
2	Avon	Barksdale	445-555-0158
3	Michael	Bluth	507-156-7515
4	Sterling	Archer	448-654-8565
5	Omar	Little	
6	Dee	Reynolds	314-889-1874
7	Jon	Snow	415-725-6385

< Close

Add a Contact



Name · **Required**

Assigned to you (Justin Russell) ▾

[Edit name details](#)

Background info

Website



[+ Add another](#)

Target Enroll Date

Alternate Contact (POA or Similar)

Preferred Contact Method

Alternate Contact Phone

Company name

Medicare ID Number

Job title

Social Media Page

Email

Work ▾



[+ Add another](#)

Phone

Create contact

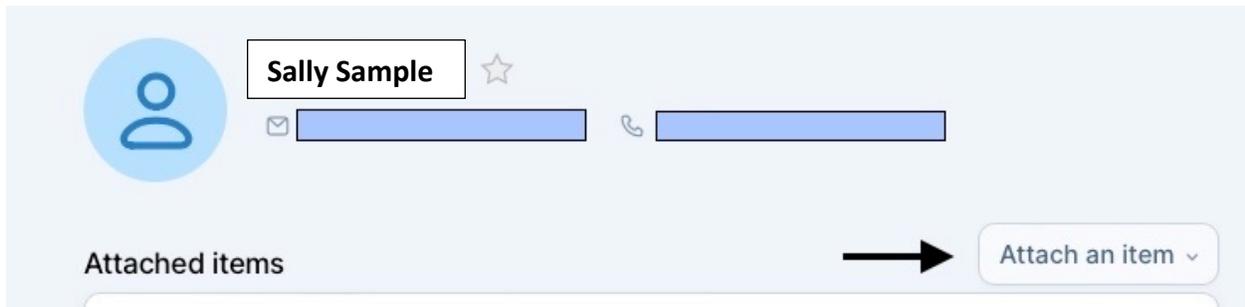
Cancel

Enter any information you have on this screen.
Once entered then click on create contact.
This will create a record for this person.

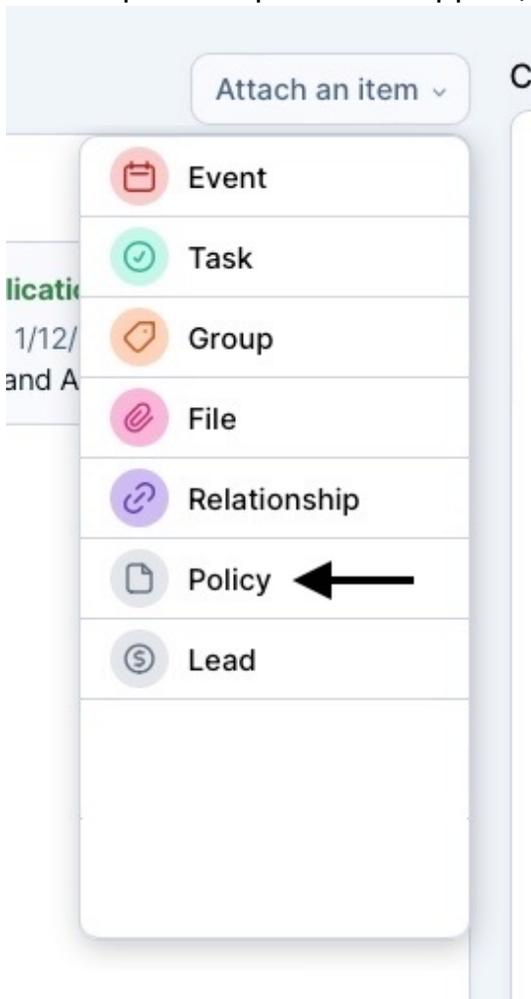
Chapter Two

Attaching Policies to contact Records

Use the search function and type contacts name, click on the contact to see their file. Now put your mouse on “Attach an item”



The dropdown options will appear, then click on Policy.



You will now see this screen.

 **Policy**  **Sally Sample**

Status
● Appointment Scheduled

Type Policy Application Date

Carrier Policy Effective Date

Policy Number Policy Cancellation Date

Monthly Commission Amount (\$) Commission Expiration

PDP/MAPD Contract Number Monthly Premium at issue

Enter the information that you have for this persons policy that you have sold them. If selling multiple policies (Med Sup + PDP + Dental/Vision) you will need to repeat this process until all policies are added. [Make sure to click Save Policy before moving to the next one!](#)

Start with Policy status, change that from the default Appointment Scheduled to Application Approved.

 **Policy**  Sally Sample

Status

- ✓ Appointment Scheduled
- Application Submitted
- Underwriting in Progress
- Application Approved**
- Application Denied (Closed)
- Policy Cancelled/Lost Customer (Closed)
- Policy Cancelled - Deceased Client (Closed)
- Plan Switch - Policy Changed (Closed)

Then go to Policy Type.

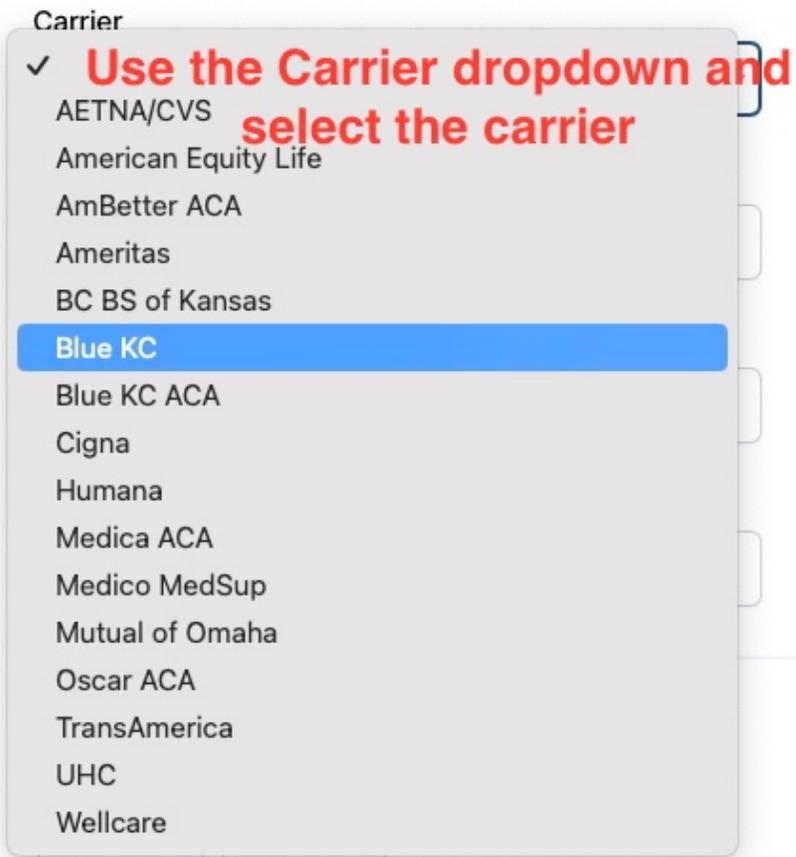
Type	<input type="text"/>	Policy Application Date	<input type="text" value="mm/dd/yyyy"/>
Carrier	<input type="text"/>	Policy Effective Date	<input type="text" value="mm/dd/yyyy"/>
Policy Number	<input type="text"/>	Policy Cancellation Date	<input type="text" value="mm/dd/yyyy"/>
Monthly Commission Amount (\$)	<input type="text"/>	Commission Expiration	<input type="text" value="mm/dd/yyyy"/>
PDP/MAPD Contract Number	<input type="text"/>	Monthly Premium at issue	<input type="text"/>

Select the type drop down and choose the appropriate policy type

Select the type of Policy sold to this person.

Type

- ✓
- Medicare Advantage**
- Medicare Supplement
- Stand Alone PDP
- Dental Insurance
- Life Insurance
- Health Insurance
- Vision Only Plan



Carrier list is customized to you at set up with the carriers you are licensed and appointed with.

Now you will enter the Policy Number, and the Plans contract code. We like to put the plan name as well in this field. (S6502-004 BC/BS Simply Blue + Active)

Policy Number

Enter the policy number once app is approved

Monthly Commission Amount (\$)

OPTIONAL

PDP/MAPD Contract Number

Enter the Contract number and plan name

Policy Cancellation Date

mm/dd/yyyy

Use this field for plan change (AEP) or member passed



Commission Expiration

mm/dd/yyyy



Use these fields for Med Sup clients

Monthly Premium at issue

\$150 Plan G



Now go to Policy Application Date. You can type the date in the box but you must click on the date on the calendar.

Policy Application Date Select the date you enrolled your client

mm/dd/yyyy 

May 2024							June 2024						
Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa
28	29	30	1	2	3	4	26	27	28	29	30	31	1
5	6	7	8	9	10	11	2	3	4	5	6	7	8
12	13	14	15	16	17	18	9	10	11	12	13	14	15
19	20	21	22	23	24	25	16	17	18	19	20	21	22
26	27	28	29	30	31	1	23	24	25	26	27	28	29
							30	1	2	3	4	5	6

mm/dd/yyyy 

Next Policy Effective Date.

Policy Effective Date Select the Policy effective date

mm/dd/yyyy 

May 2024							June 2024						
Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa
28	29	30	1	2	3	4	26	27	28	29	30	1	2
5	6	7	8	9	10	11	2	3	4	5	6	7	8
12	13	14	15	16	17	18	9	10	11	12	13	14	15
19	20	21	22	23	24	25	16	17	18	19	20	21	22
26	27	28	29	30	31	1	23	24	25	26	27	28	29
							30	1	2	3	4	5	6

Completed fields should look like this.

 **Policy**  **Sally Sample**

Status
● Application Approved

Type Medicare Advantage **Policy Application Date** 05/20/2024

Carrier Blue KC **Policy Effective Date** 07/01/2024

Policy Number **Policy Cancellation Date** mm/dd/yyyy

Monthly Commission Amount (\$) **Commission Expiration** mm/dd/yyyy

PDP/MAPD Contract Number S6502-004 Simply Blue + Active **Monthly Premium at issue** \$0

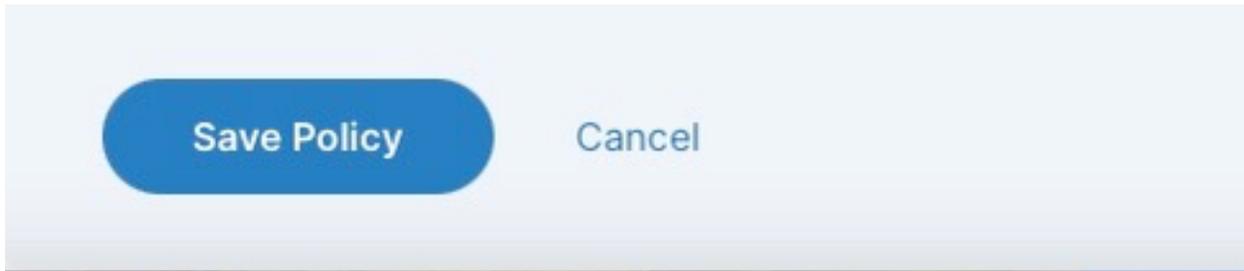
 **Attach an item**

 Note  Task

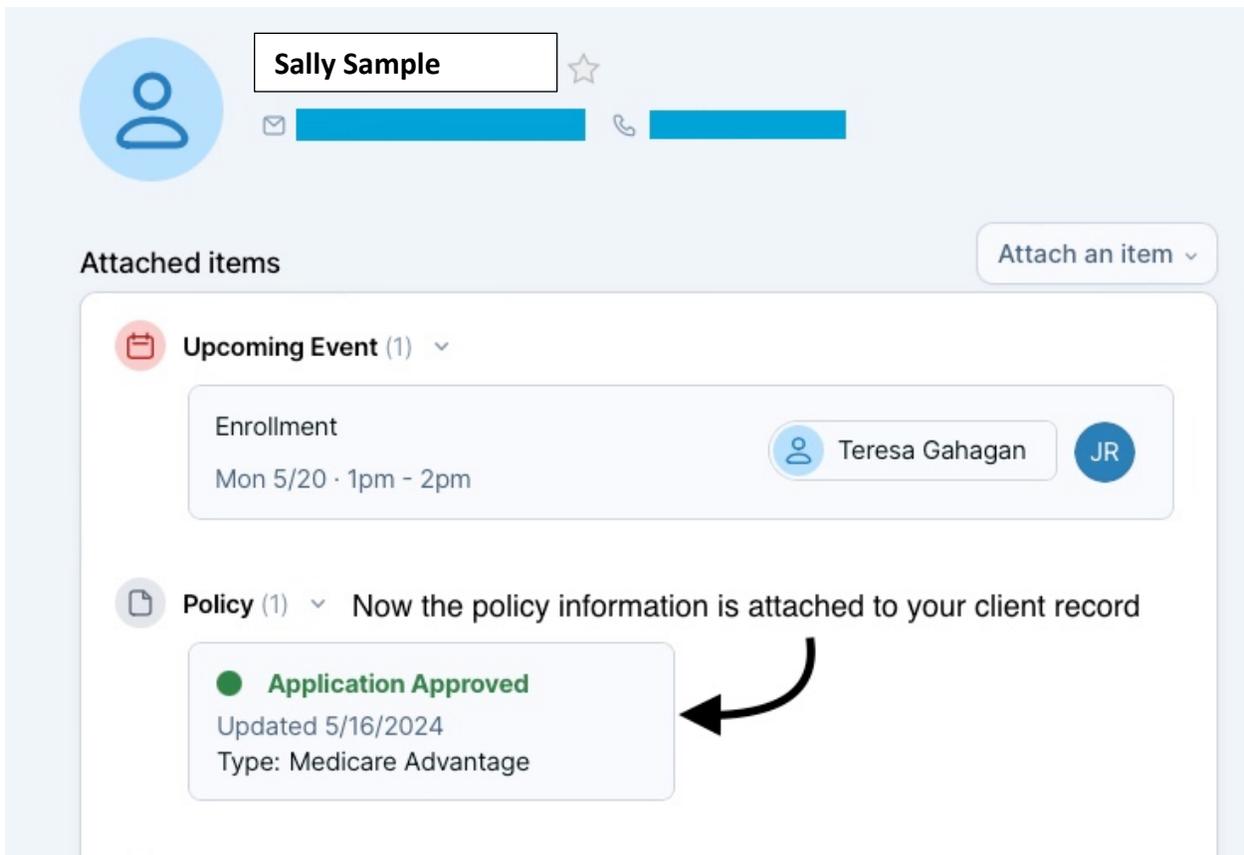
Fields should look like this when completed.
Then click on Save Policy.

Save Policy [Cancel](#)

Once you have clicked on Save Policy.



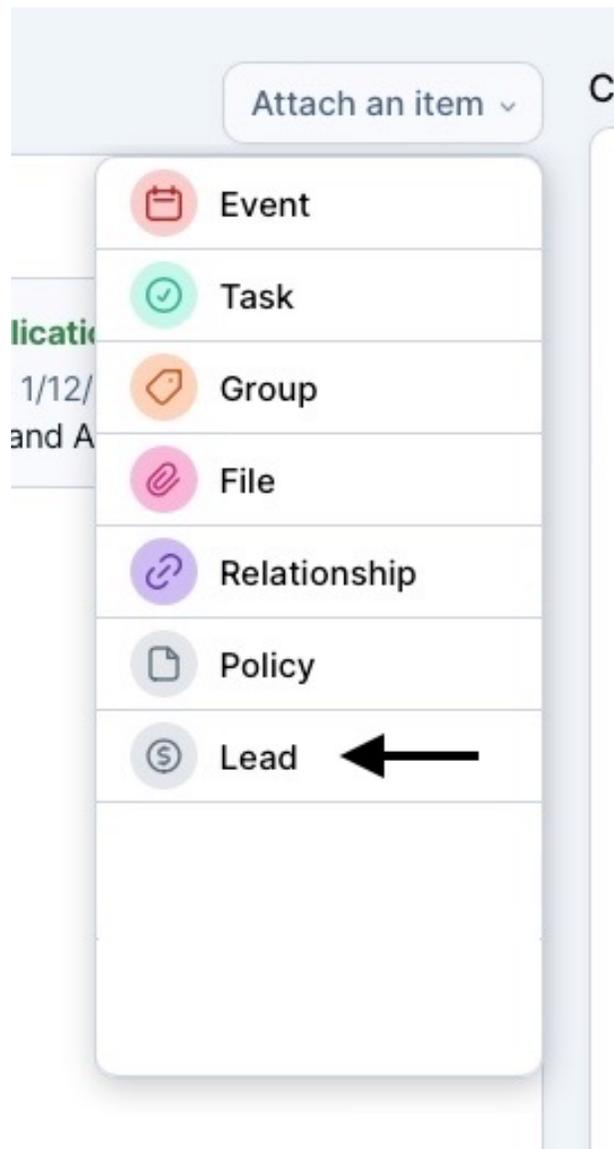
The Policy information will be attached to the contacts record and will look like this.



Chapter Three

How to Attach a Lead Status

When you are creating the contact record, refer back to the “Attach an item” drop down box and click on Lead.



 **Lead**  **Sally Sample**

Status

- ✓ Prospect
- Qualified Lead
- Not Right Now
- AEP Prospect
- EGHP past 65
- Orphan
- Lost Sale - Bought Elsewhere (Closed)
- Current Client (Closed)
- Deceased Client (Closed)
- Non-Responsive Lead (Closed)

Special Requirements

Select the lead status from the drop-down box, refer to the definitions for lead status if needed.

Now we are going to change this persons Lead Status from a Qualified Lead to Current Client (Closed)

 **Lead (1)** ▾

 **Qualified Lead**

Updated 4/4/2024

Status

- ✓ Prospect
- Qualified Lead
- Not Right Now
- AEP Prospect
- EGHP past 65
- Orphan
- Lost Sale - Bought Elsewhere (Closed)
- Current Client (Closed) ←
- Deceased Client (Closed)
- Non-Responsive Lead (Closed)

Special requirements



Sally Sample



(913)

Attached items

Upcoming Event (1) ▾

Enrollment

Mon 5/20 · 1pm - 2pm

Policy (1) ▾

● Application Approved

Updated 5/16/2024

Type: Medicare Advantage

Lead (2) ▾ Now this contact is listed as a Current Client.

Current Client 5/16/2024

Chapter Four

Running Reports

How to run reports and filter information and creating contacts for companies/carriers and adding contacts at those carriers, certification links, and other websites.



If you click on Policies, you will see the Policy report and the information of your clients you have enrolled that you have attached the policy information to their contact card. The Policy report will show all members regardless of carrier you enrolled them with. You can filter this information if you want to see a specific carrier.

Policy Report

Select all

1-100 of 444 >

 Manuel Abarca

 (913) 244-3570
 Justin Russell

 **Application Approved**

Updated 5/7/2024

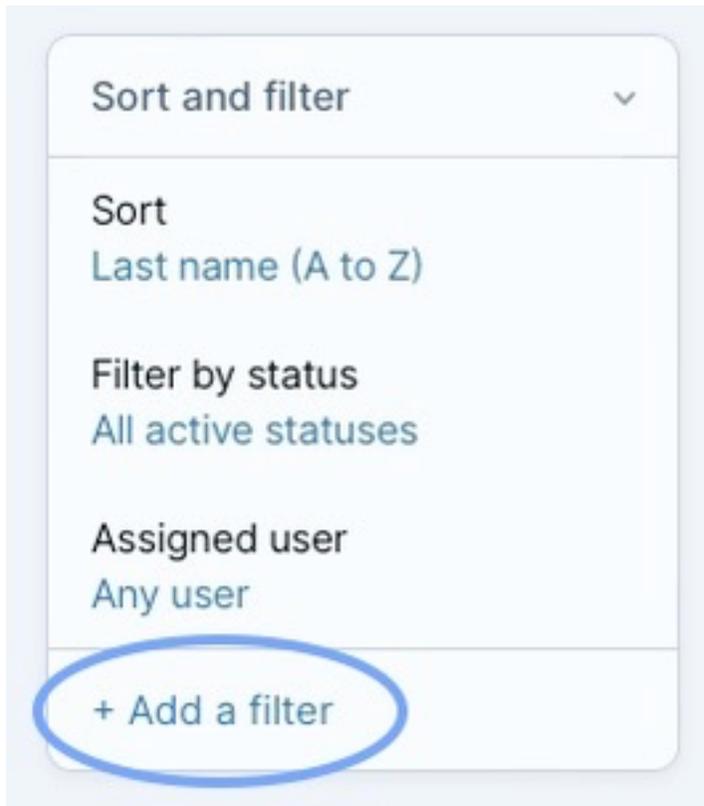
Type: Medicare Advantage

Carrier: Blue KC

PDP/MAPD Contract Numb...: H6502-002 Blue KC Essential

Monthly Premium at issue: \$0

If you click on + Add a filter you then will be able to sort by using the dropdown box.



This box will appear, use the dropdown box to filter if you are looking for a specific carrier, or plan type, policy effective date, or policy application date.

Add a filter ×

What would you like to filter by?

Apply filter Cancel

Add a filter

What would you like to filter by?

✓ -----Policy Fields-----

- Date Policy was created
- Date Policy was updated
- Type
- Carrier
- Policy Number
- Monthly Commission Amount (\$)
- PDP/MAPD Contract Number
- Policy Application Date
- Policy Effective Date
- Policy Cancellation Date
- Commission Expiration
- Monthly Premium at issue

Cancel

Add a filter

What would you like to filter by?

Only show results where ...

Apply filter

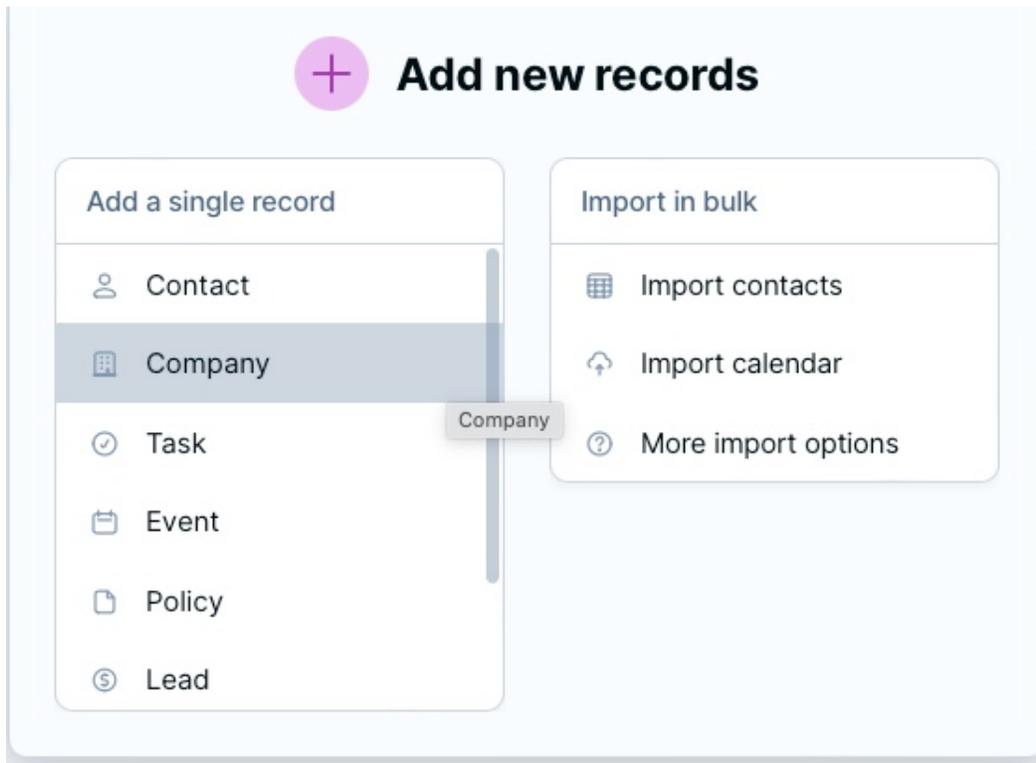
Cancel

Always click on Apply Filter to see the results.

Chapter Five

Adding a Company Contact

Very similar to adding a personal contact but here you can put websites for company, or certification links for carriers, log in information username & PASSWORD *** Very important***



Add a Company

 **Company Name** · Required Assigned to you (Justin Russell) ▾

Affiliated Companies <input type="text"/>	Website <input type="text"/> × + Add another
Contracting Process <input type="text"/>	User ID for portal <input type="text"/>
Email <input type="text"/> Work ▾ × + Add another	Password <input type="text"/>
Phone <input type="text"/> Work ▾ × + Add another	Background info <input type="text"/>
Address <input type="text"/> Work ▾ × + Add another	

Use the + Add another option for website since carriers have different websites for BOB, certification, pharmacy look up and others. You can add several websites for a company.

Use the background info for your notes, if there are different phone or emails for departments within the company.

You can also add contacts within the company record. Example with Aetna MAPD.

Company info

[Edit](#)

Assigned to
Darrell Russell

Company Name
AETNA CVS Medicare
Advantage

Affiliated Companies
AETNA - Silverscript
SILVERSCRIPT

Contracting Process
Carrier Invite

Work Email
BrokerSupport@aetna.com

Other Email
laau@aetna.com

Work Phone
1-866-714-9301

Other Phone
(866) 727-3092

Work Address - [map](#)
9401 Indian Creek Pkwy #
1300
Overland Park, KS 66210

Website
<https://www.aetna.com/insur...>

Background Info
Other phone is Cust Svc
Silverscript PDP
Use Option #7 to verify DSNP
eligibility

Contacts at this company

Becky Ware

wareb@aetna.com
(913) 202-5031

**Darrell Fankhauser (KC Broker
Manager)**

fankhauserd@aetna.com
(913) 202-5630

**Gail Meadows (KC Market
Director)**

ggmeadows@aetna.com
(913) 202-6003

Jason Ware (Broker Manager)

warew@aetna.com
(816) 536-3068

**Medicare Certification Site
Link**

**Pat Chambers (KC Broker
Manager)**

pxchambers@aetna.com
(913) 202-5770

Pharmacy Look up tool link

Provider Search

Sales Kit Ordering

**Silverscript PDP Enrollment
Portal Link**

[Add another contact at this
company](#)

Any websites or links that you put here are clickable and will take you to the website right from Less Annoying CRM.

This can be done by going here within the company record. Click on Add contact to company, you will have to manually put this information in one at a time. You can add contacts to a company 2 ways, with in the list or by going to the actions tab on the top left side of the screen.

The image shows a screenshot of a software interface for managing company records. On the left, there is a card for 'Pat Chambers (KC Broker Manager)' with contact information: 'pxchambers@aetna.com' and '(913) 202-5770'. Below this are several links: 'Pharmacy Look up tool link', 'Provider Search', 'Sales Kit Ordering', and 'Silverscript PDP Enrollment Portal Link'. At the bottom of this card, the text 'Add another contact at this company' is circled in blue. On the right, an 'Actions' dropdown menu is open, listing several options: 'Edit company', 'Add contact to compa...', 'Assign to user', 'Duplicate this company', 'Merge duplicates', 'Print', and 'Delete'. The 'Add contact to compa...' option is also circled in blue.

Pat Chambers (KC Broker Manager)
pxchambers@aetna.com
(913) 202-5770

Pharmacy Look up tool link
Provider Search
Sales Kit Ordering
Silverscript PDP Enrollment Portal Link

Add another contact at this company

Actions

- Edit company
- Add contact to compa...
- Assign to user
- Duplicate this company
- Merge duplicates
- Print
- Delete