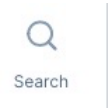
Introduction

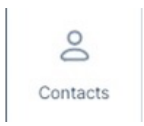
When you log in to Less Annoying CRM (LACRM) the system will default to your Workspace or your Homepage. On the left-hand side of the screen, you will see several icons.



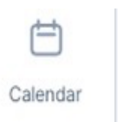
Search – If you have entered contacts already, this is where you can search by name or phone number.

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

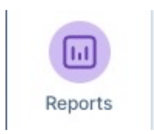
Workspace – This is your homepage where you can see your tasks for the day and upcoming events.



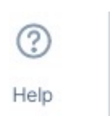
Contacts – If contacts are added, this will show you the most recent contact.



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



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

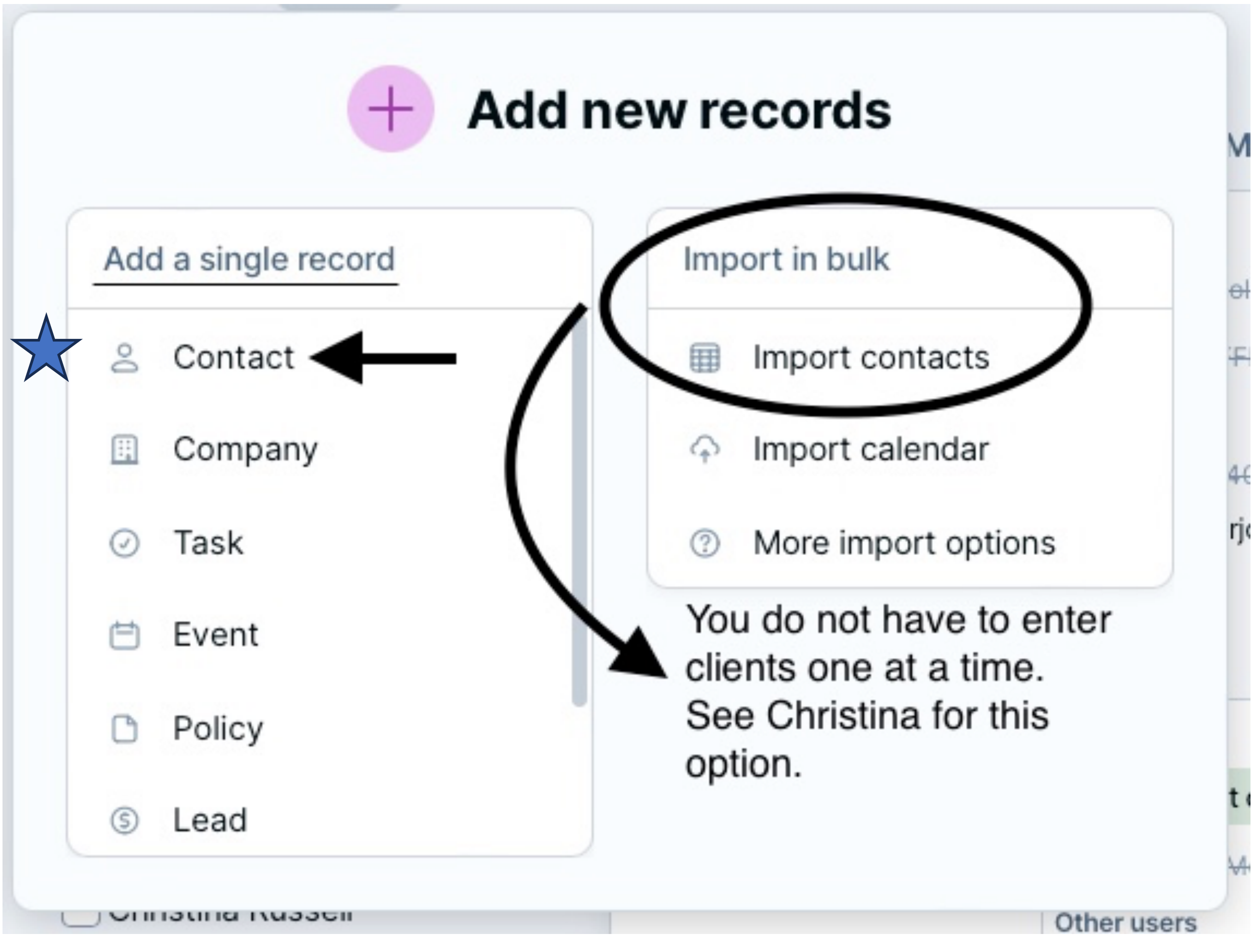
- Qualified Lead – Someone who has Medicare Parts A & B and is within a valid election period where they can be written.

- 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.

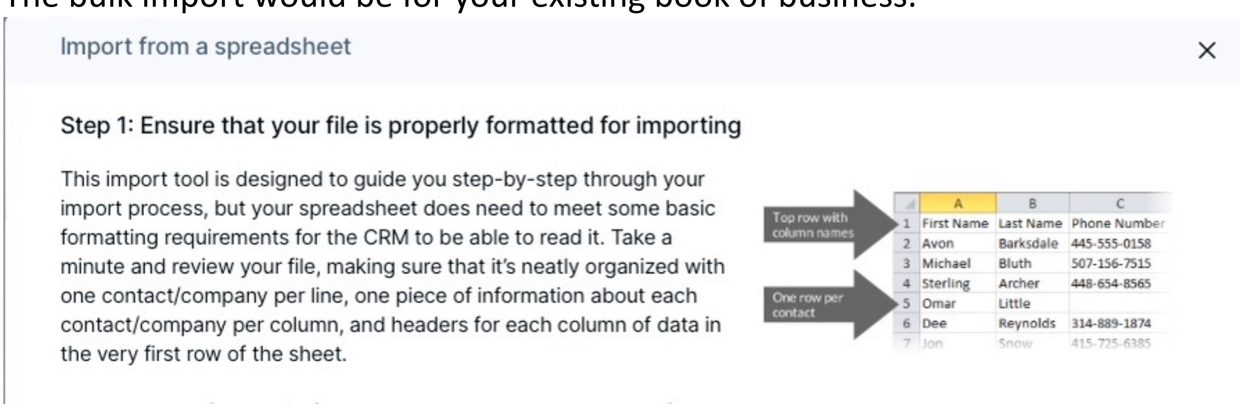
Chapter One

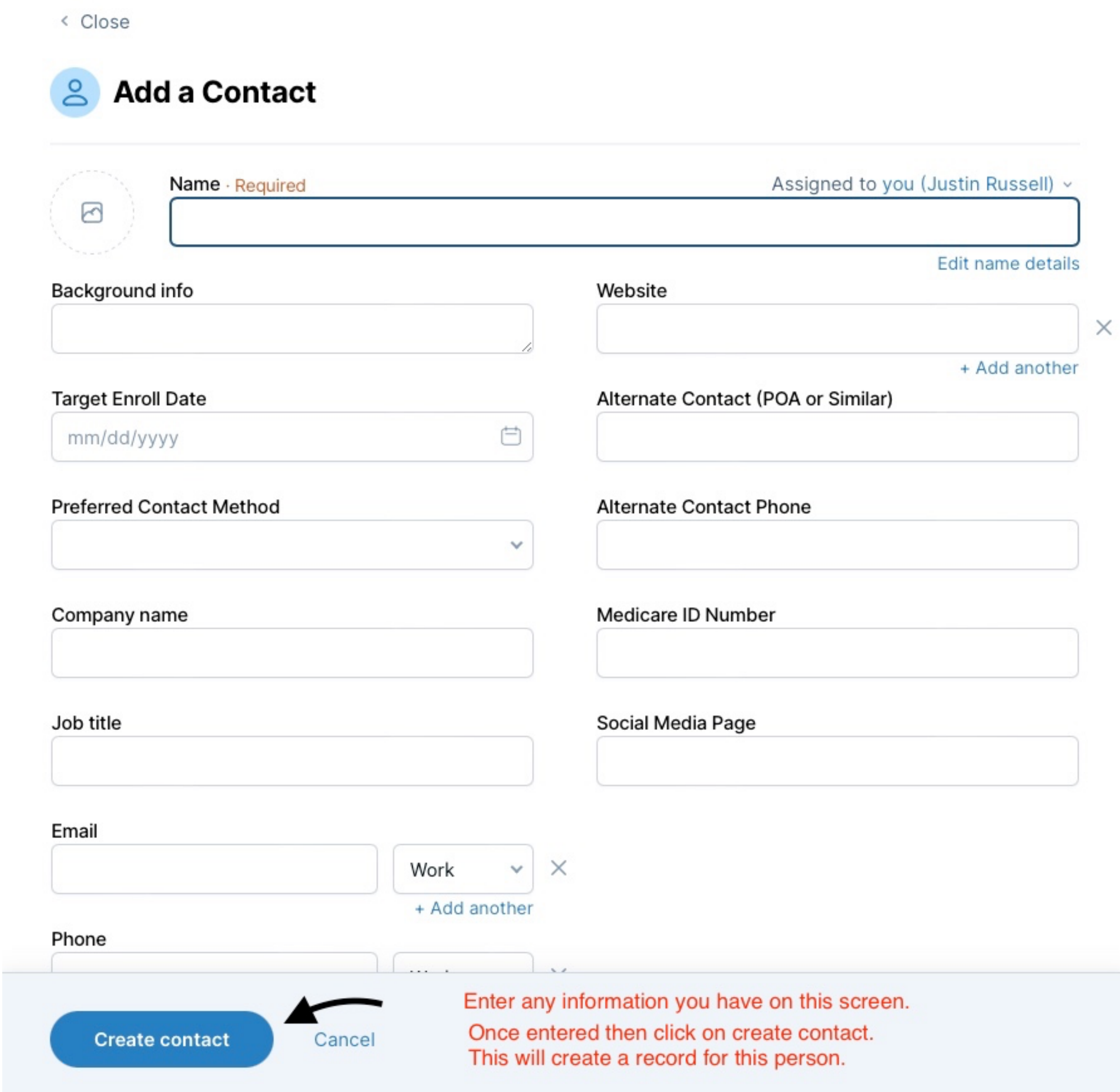
Adding individual Contacts/ Bulk Imports



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.



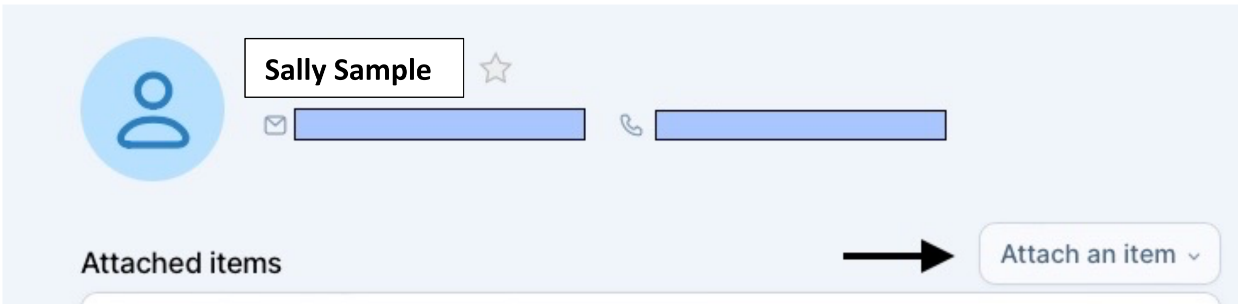


Close
Add a Contact
Name · Required
Assigned to you (Justin Russell)
Edit name details
Background info
Website
+ Add another
Target Enroll Date
mm/dd/yyyy
Alternate Contact (POA or Similar)
Preferred Contact Method
Alternate Contact Phone
Company name
Medicare ID Number
Job title
Social Media Page
Email
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.

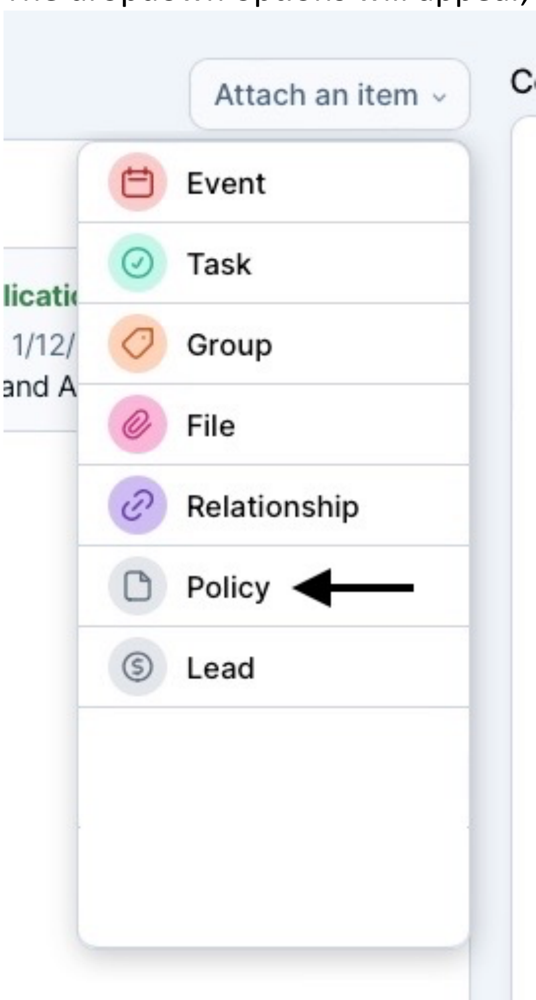
Chapter Two

Attaching Policies to contact Records

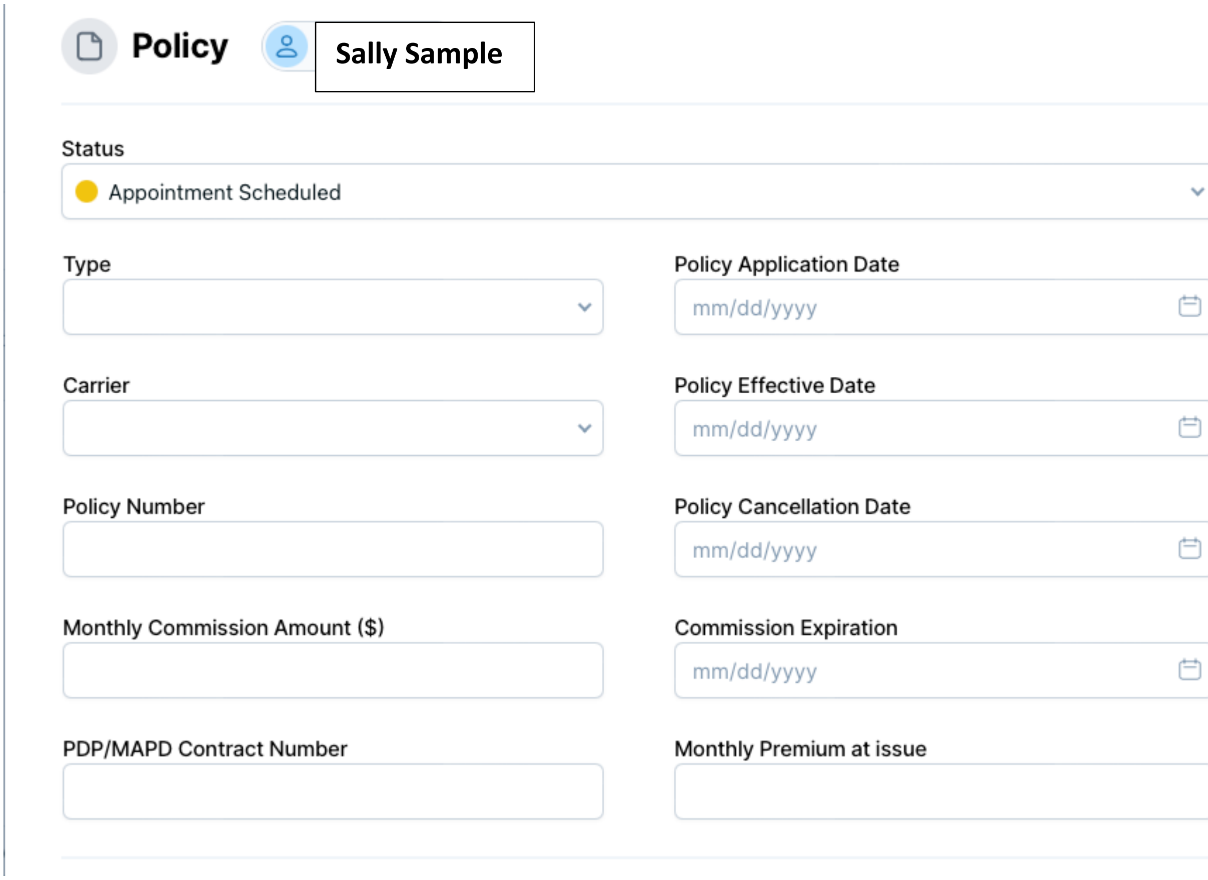
Use the search function and type contacts name, click on the contact to see their file. Now put your mouse on “Attach an item”



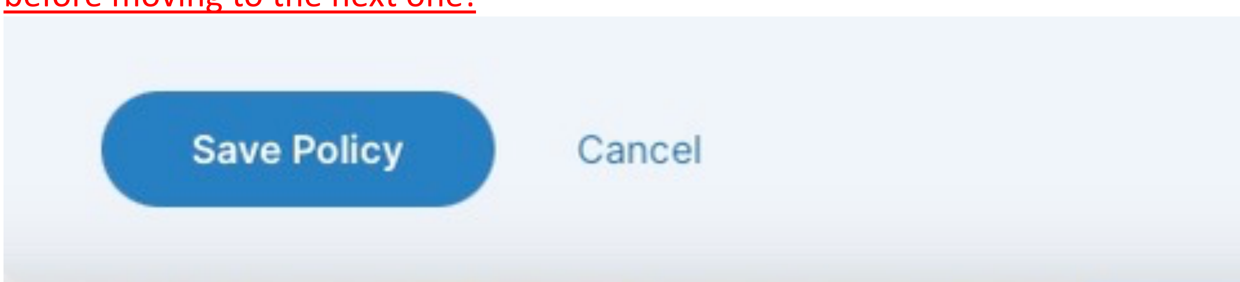
The dropdown options will appear, then click on Policy.



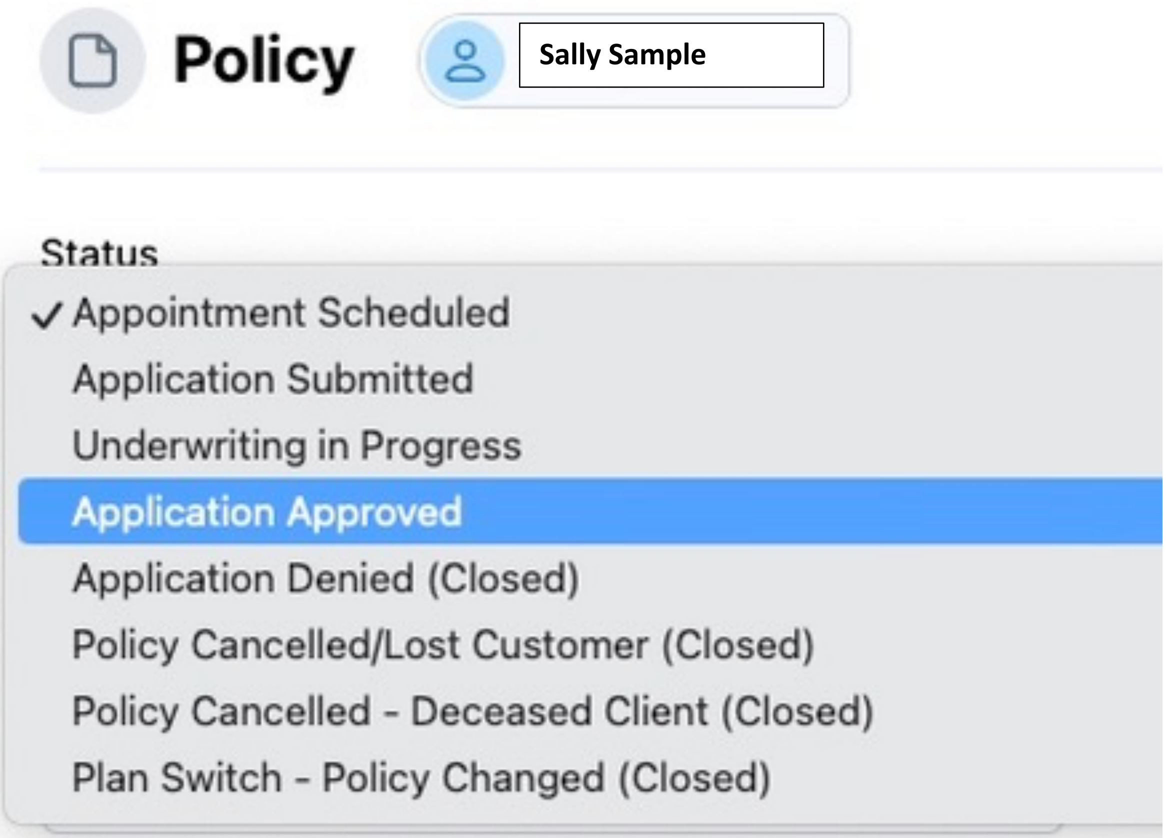
You will now see this screen.



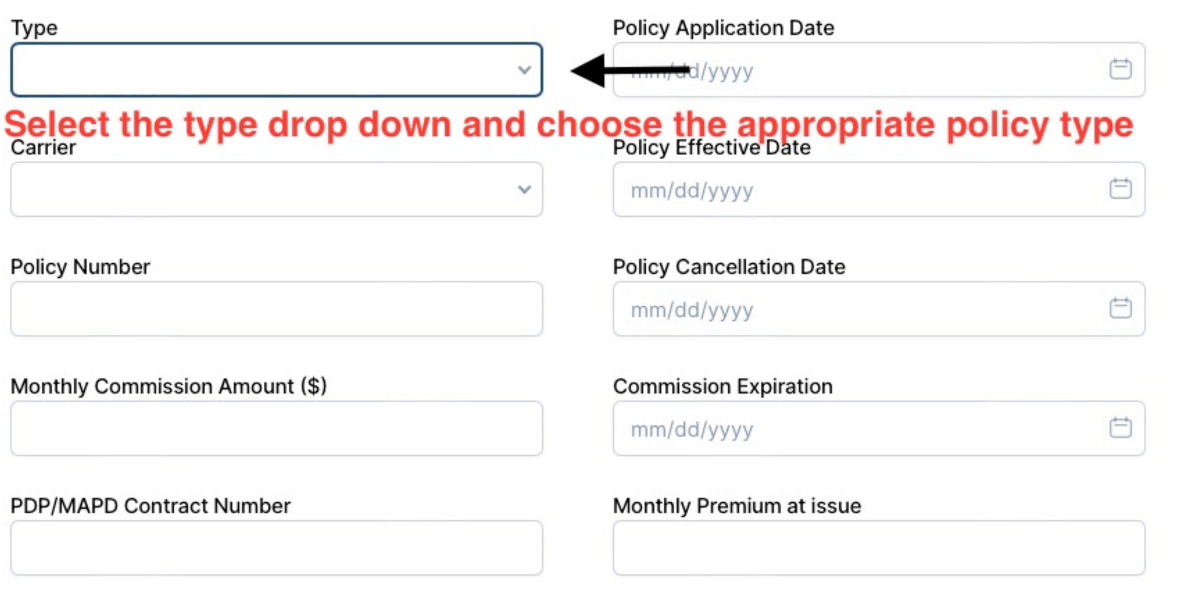
Enter the information that you have for this persons policy that you have sold them. If selling multiple policies (Med Sup + PDP + Dental/Vision) you will need to repeat this process until all policies are added. Make sure to click Save Policy before moving to the next one!



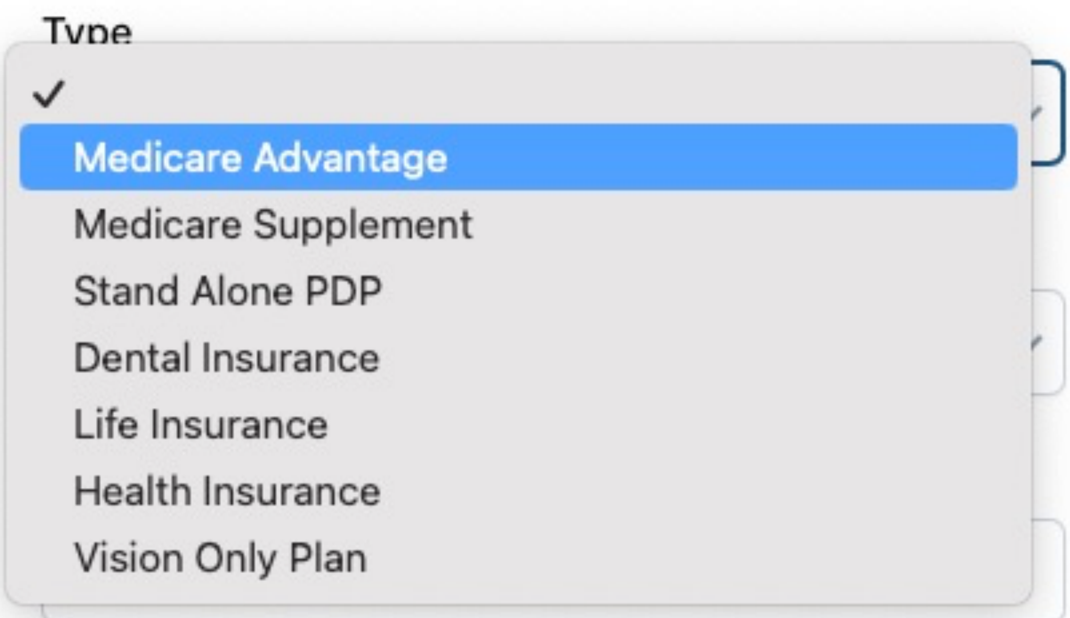
Start with Policy status, change that from the default Appointment Scheduled to Application Approved.

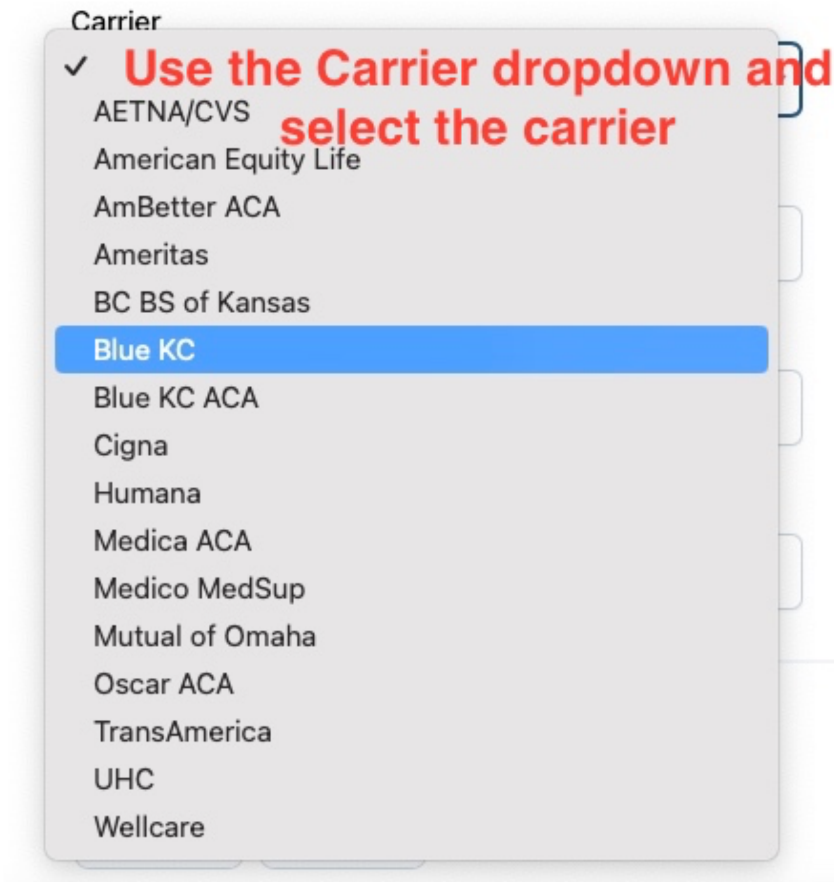


Then go to Policy Type.



Select the type of Policy sold to this person.





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

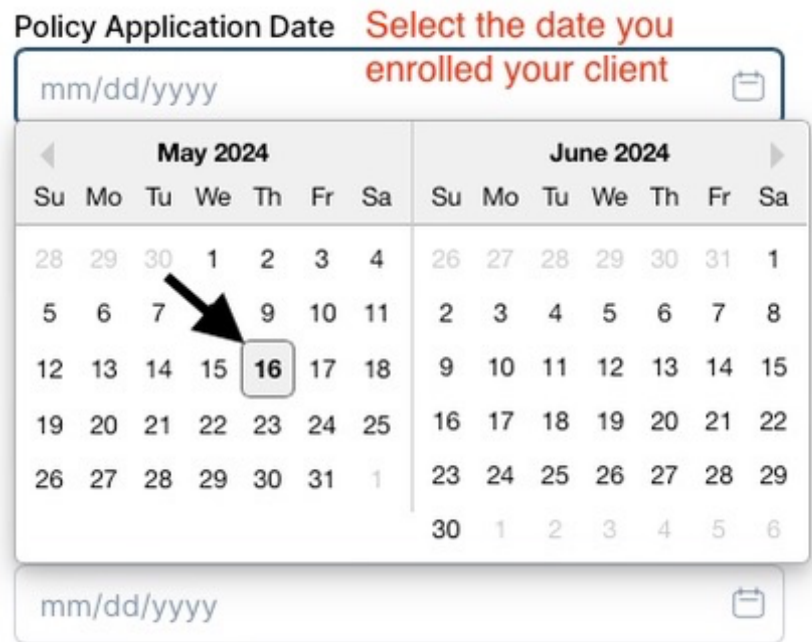
mm/dd/yyyy

Use these fields for Med Sup clients

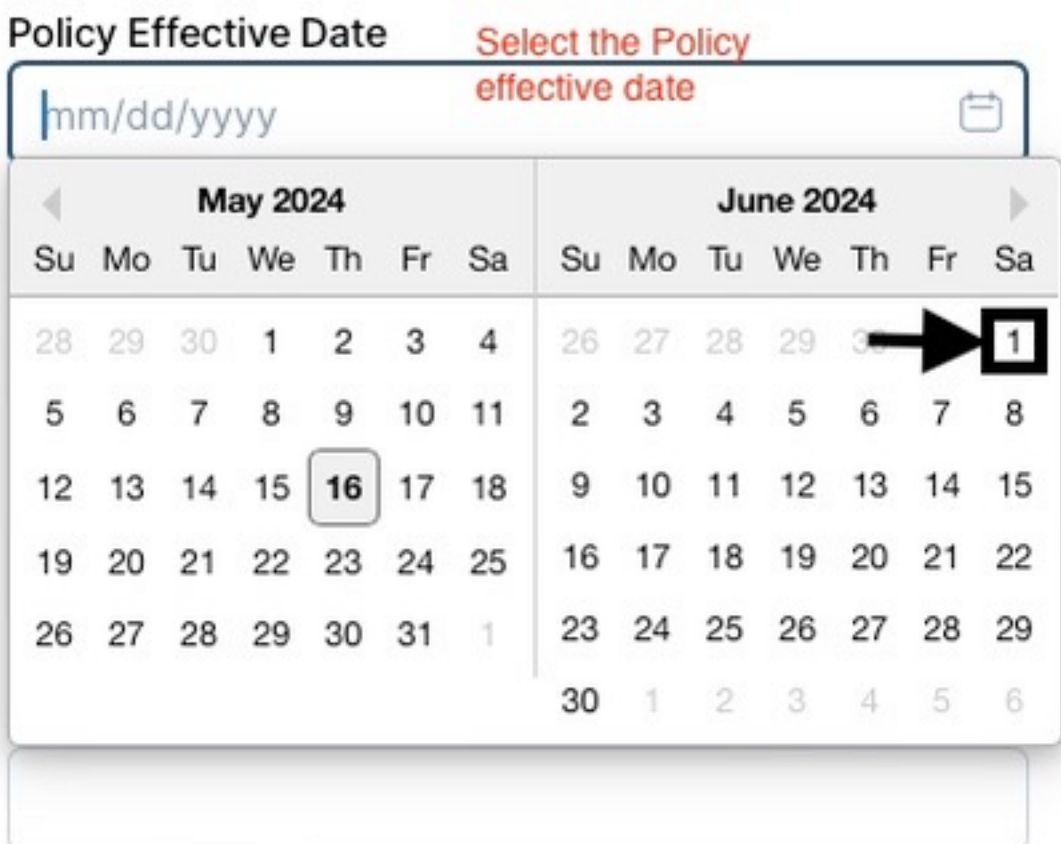
Monthly Premium at issue

$150 Plan G

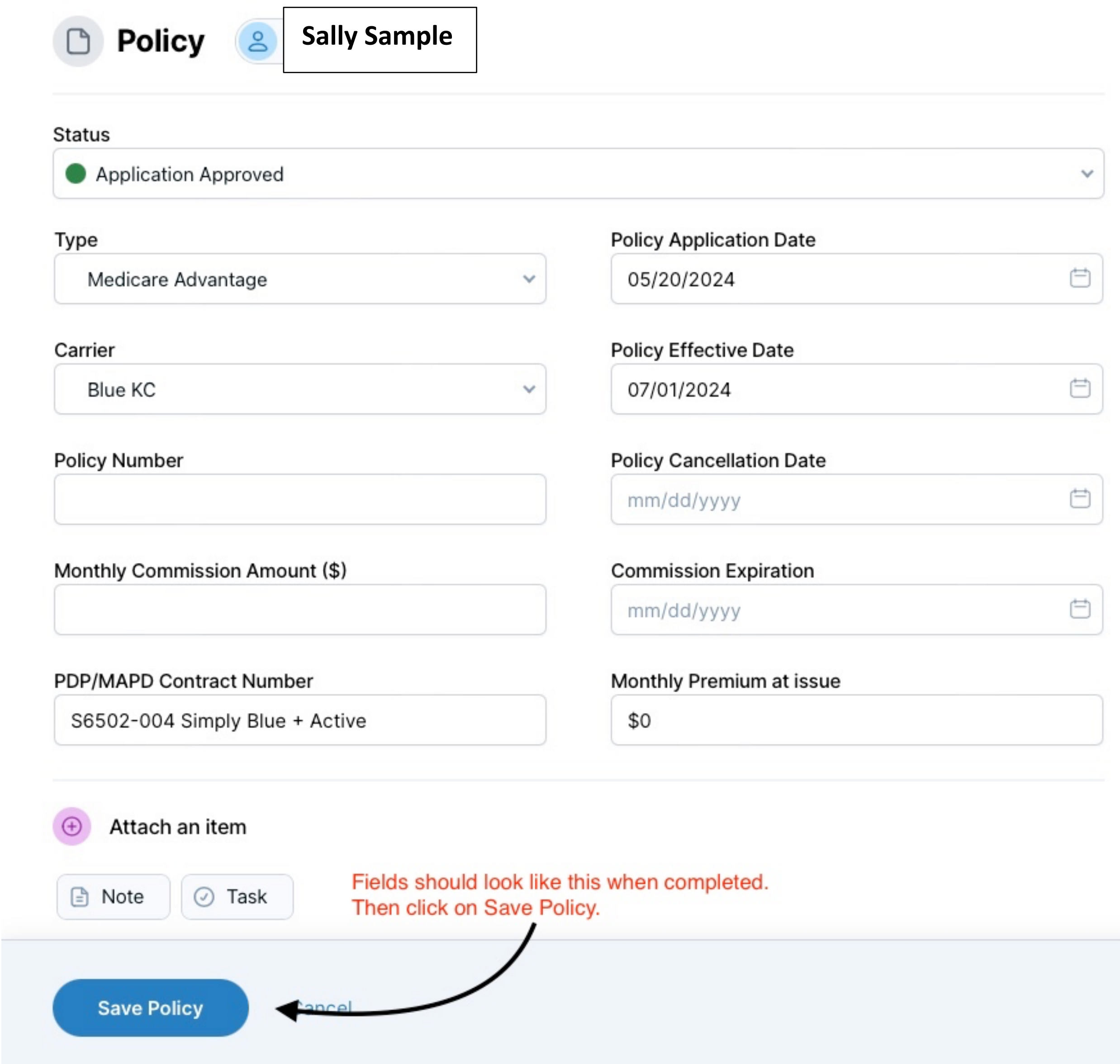
Now go to Policy Application Date. You can type the date in the box but you must click on the date on the calendar.



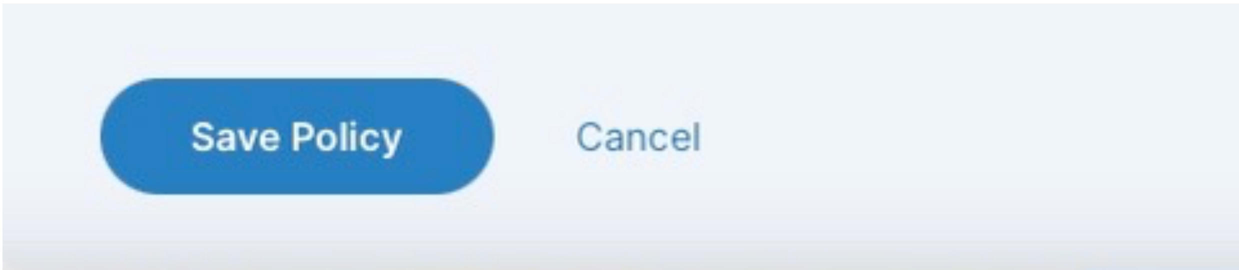
Next Policy Effective Date.



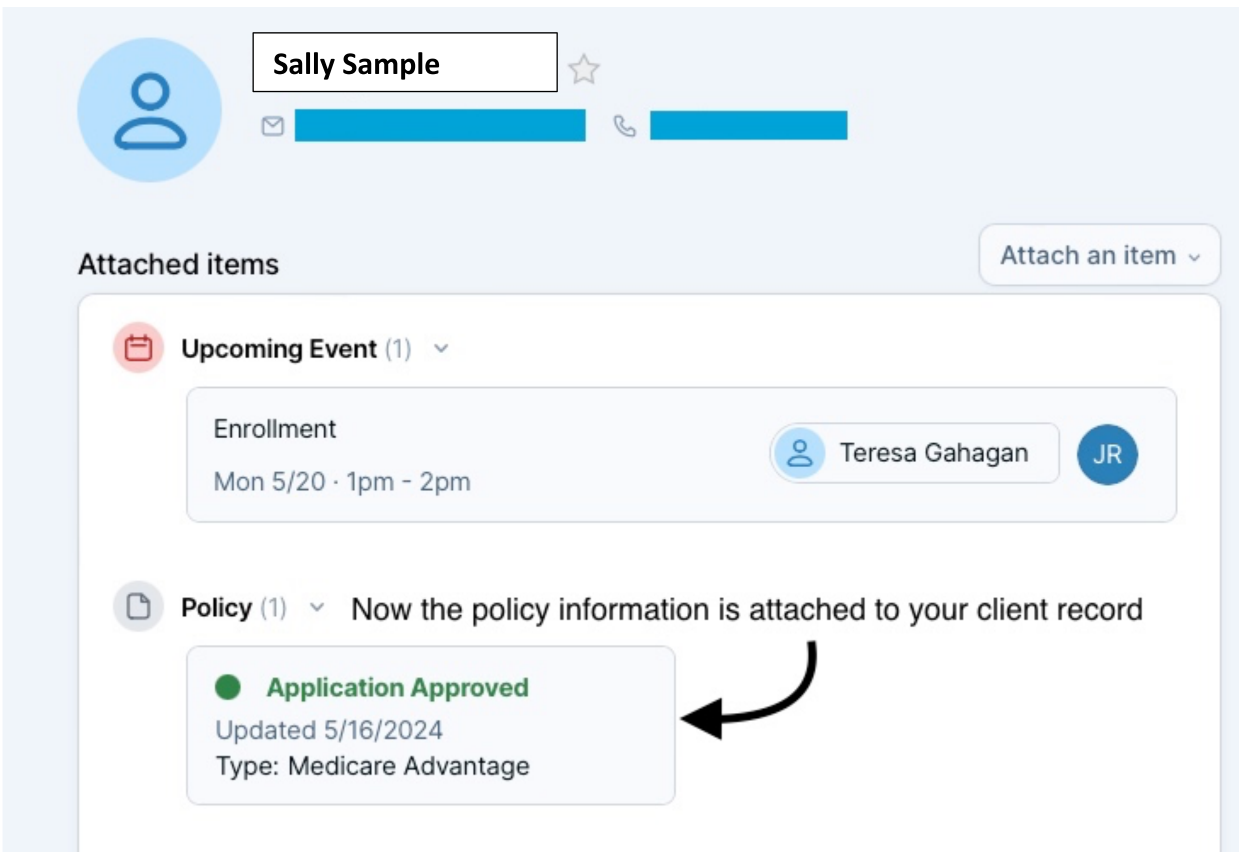
Completed fields should look like this.



Once you have clicked on Save Policy.



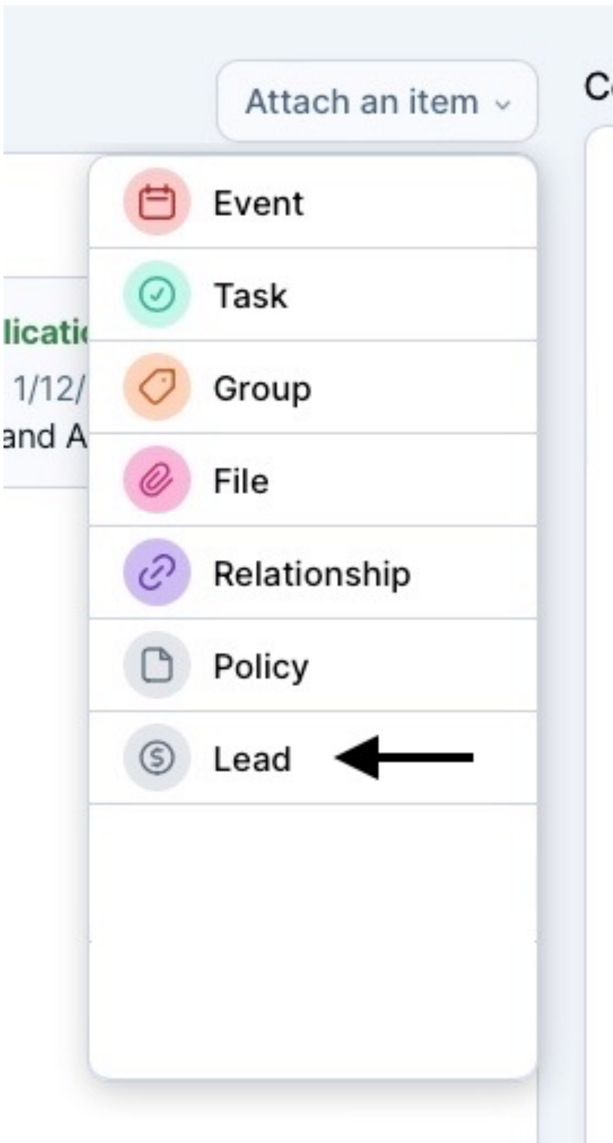
The Policy information will be attached to the contacts record and will look like this.

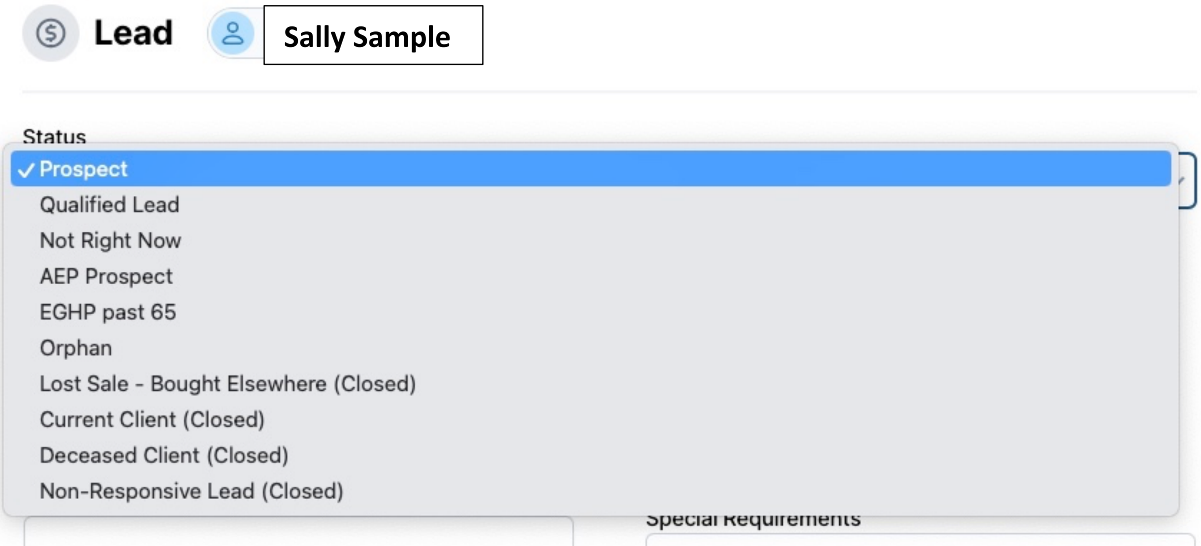


Chapter Three

How to Attach a Lead Status

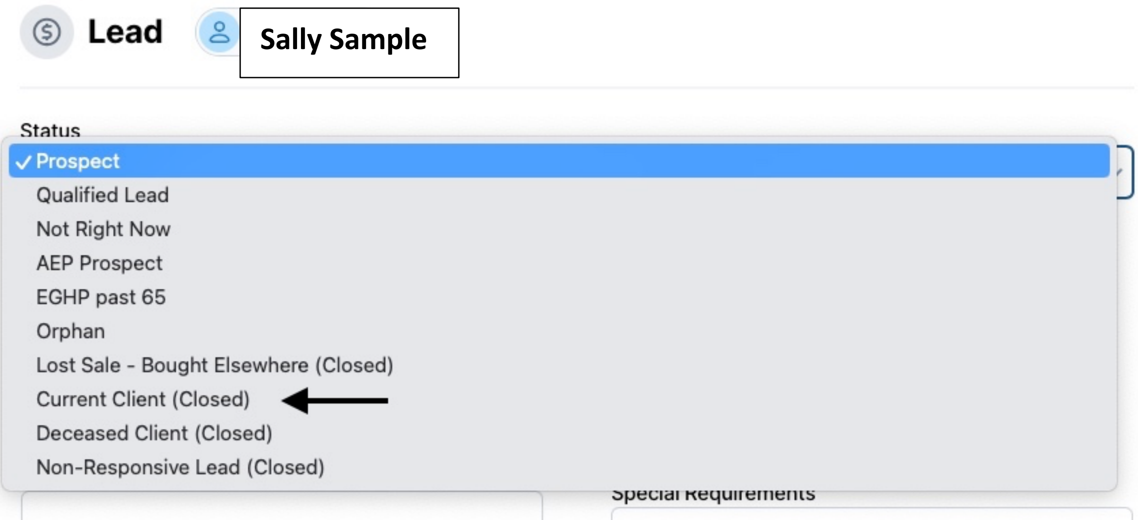
When you are creating the contact record, refer back to the “Attach an item” drop down box and click on Lead.

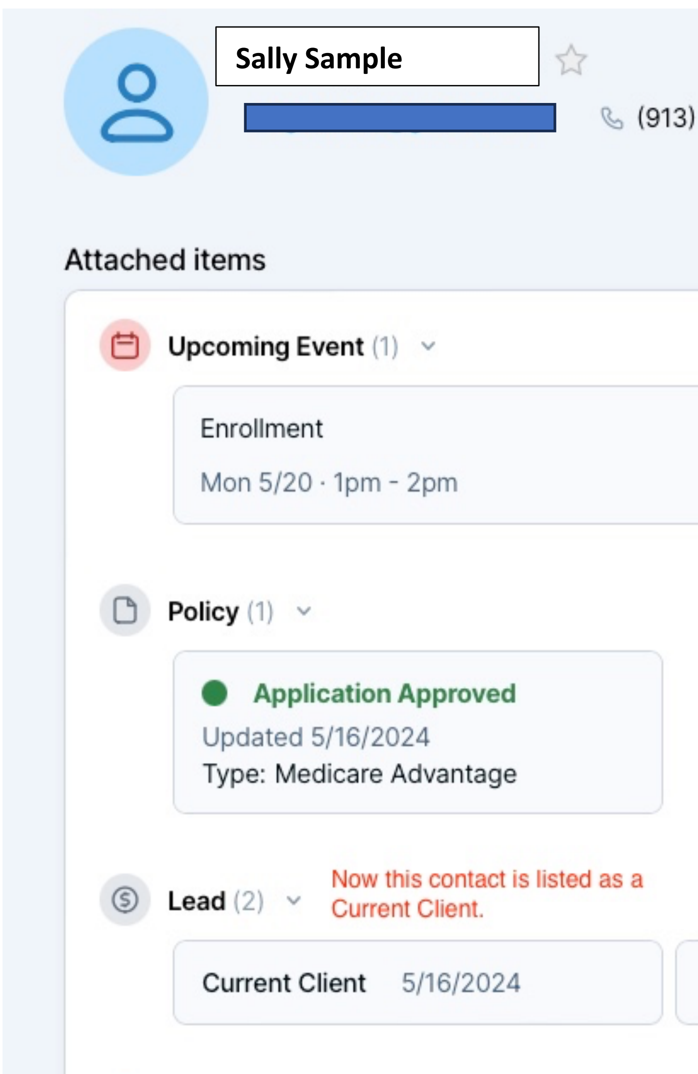




Select the lead status from the drop-down box, refer to the definitions for lead status if needed.

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

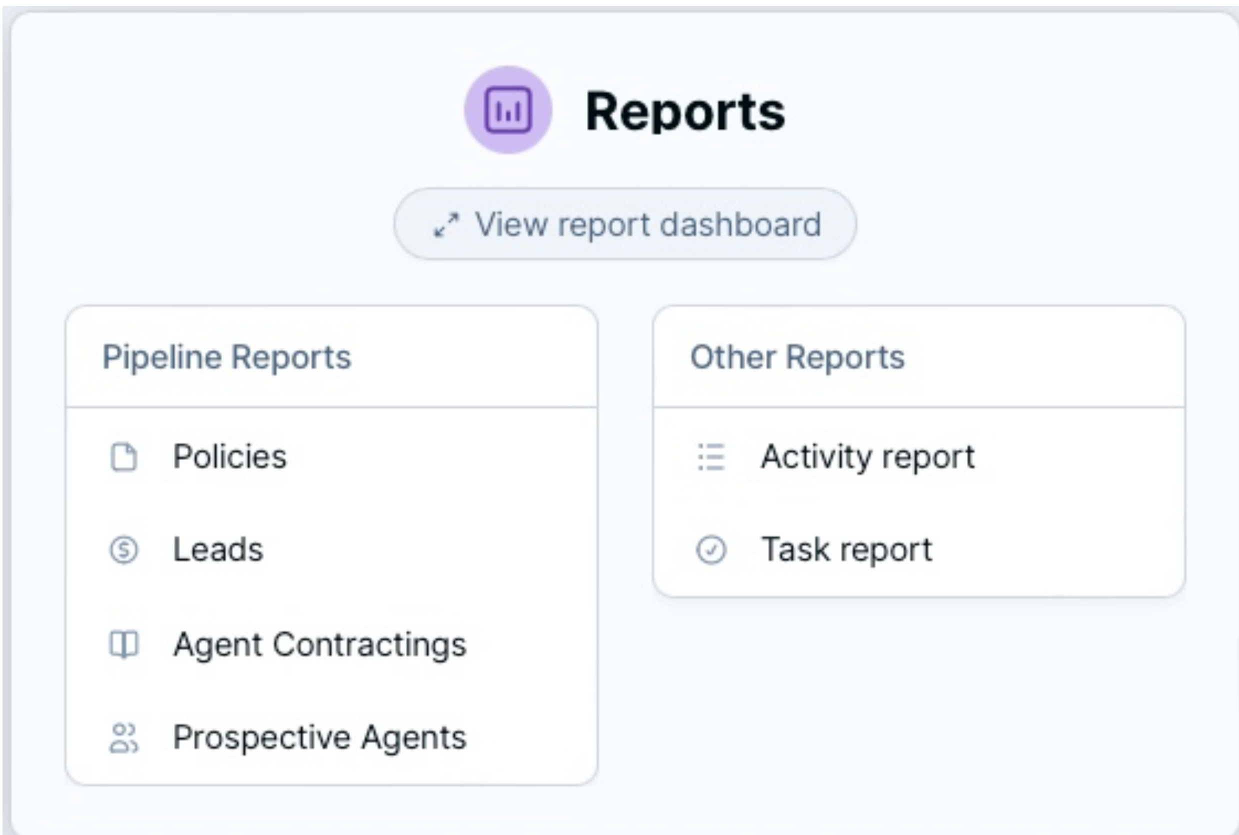

Lead
Sally Sample
Status
✓ Prospect
Qualified Lead
Not Right Now
AEP Prospect
EGHP past 65
Orphan
Lost Sale - Bought Elsewhere (Closed)
Current Client (Closed)
Deceased Client (Closed)
Non-Responsive Lead (Closed)
Special Requirements


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

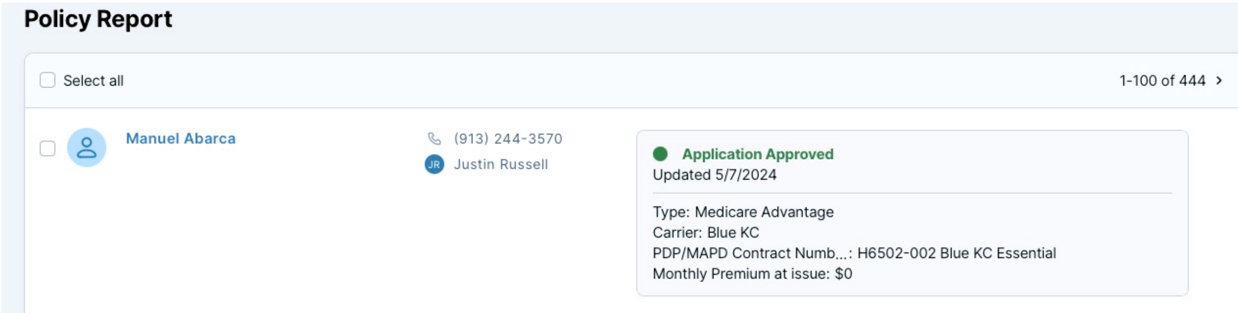
Chapter Four
Running Reports

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

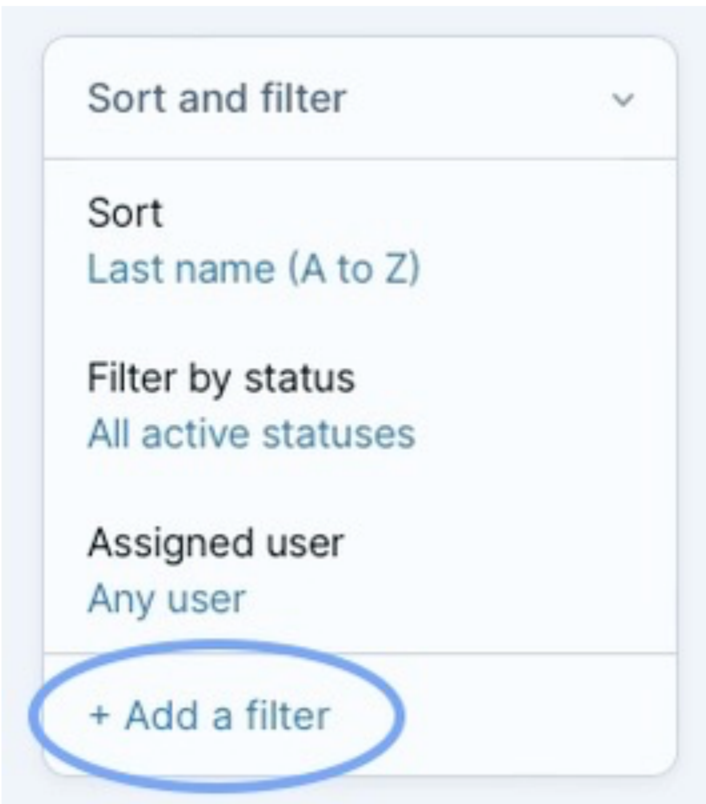
Go to Reports on the Homepage. Hover your mouse over the Reports icon and you will see screen below.



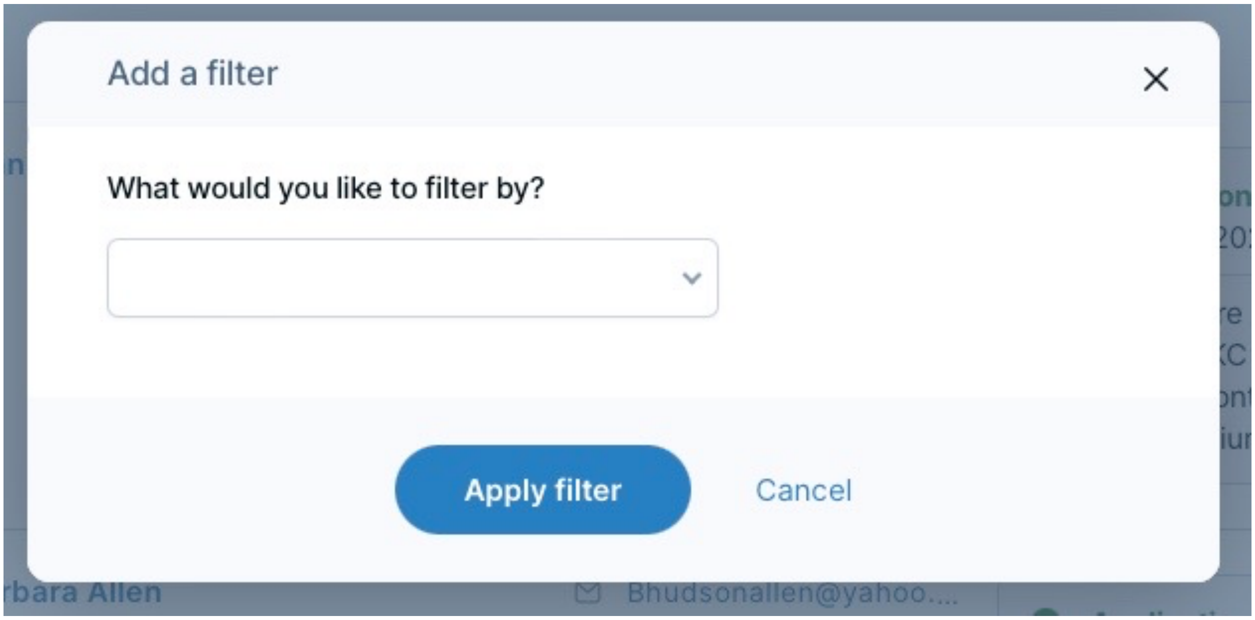
If you click on Policies, you will see the Policy report and the information of your clients you have enrolled that you have attached the policy information to their contact card. The Policy report will show all members regardless of carrier you enrolled them with. You can filter this information if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

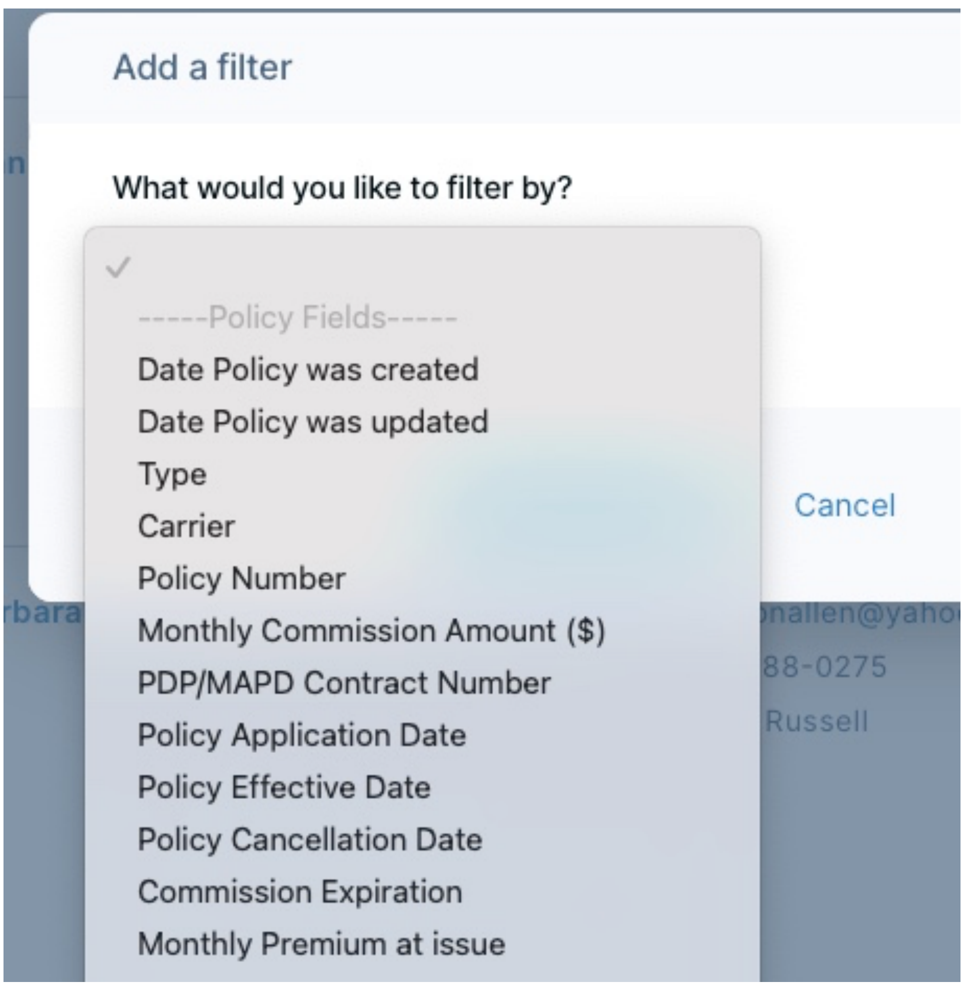


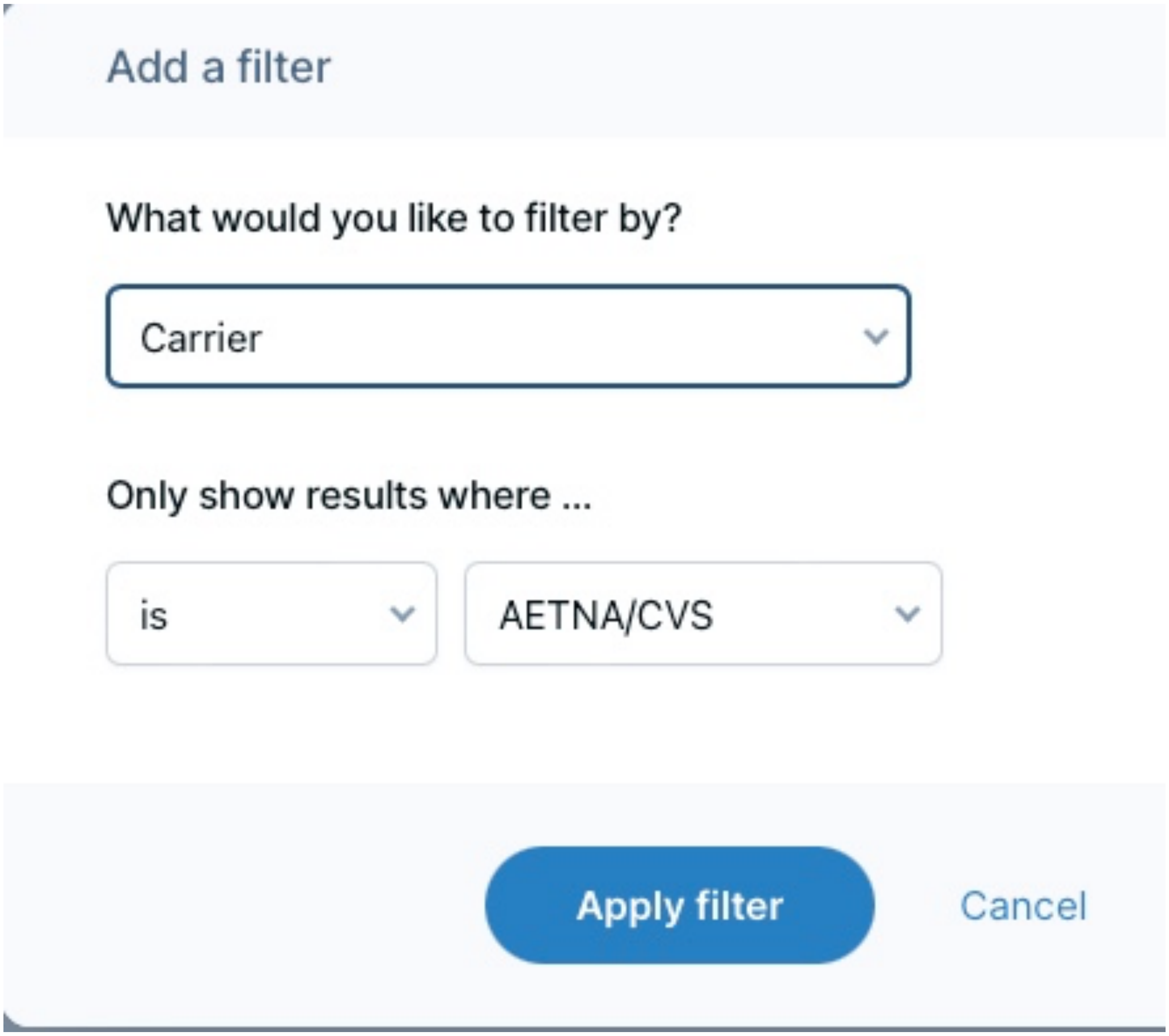
If you click on + Add a filter you then will be able to sort by using the dropdown box.



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

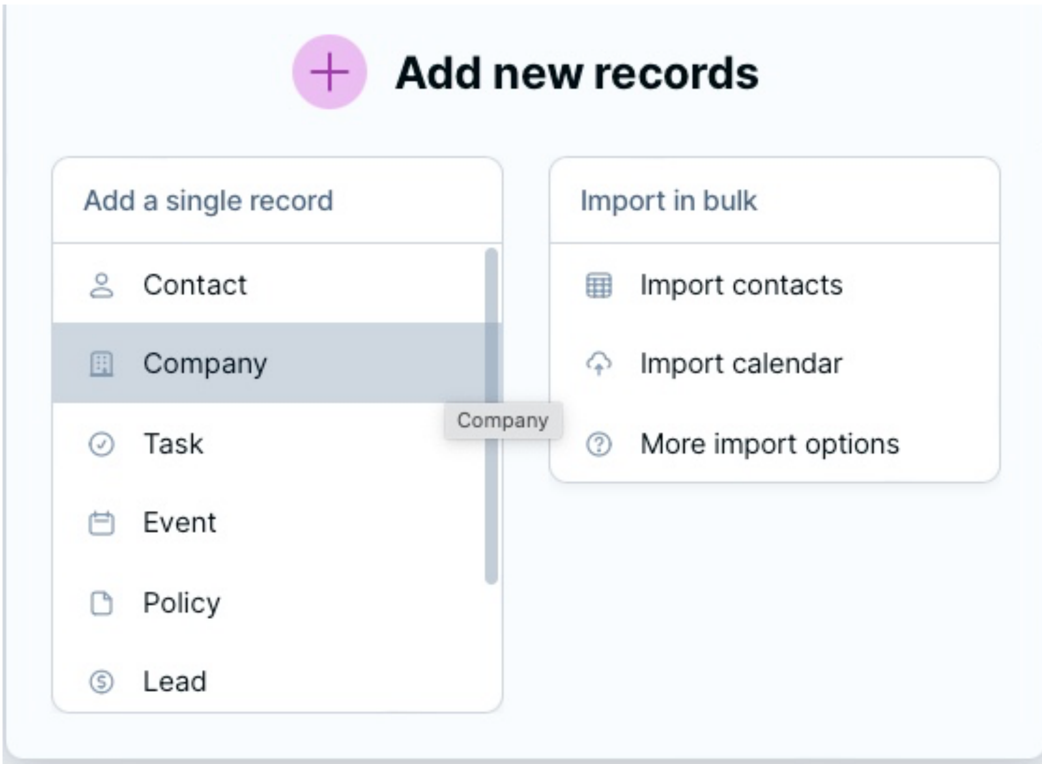


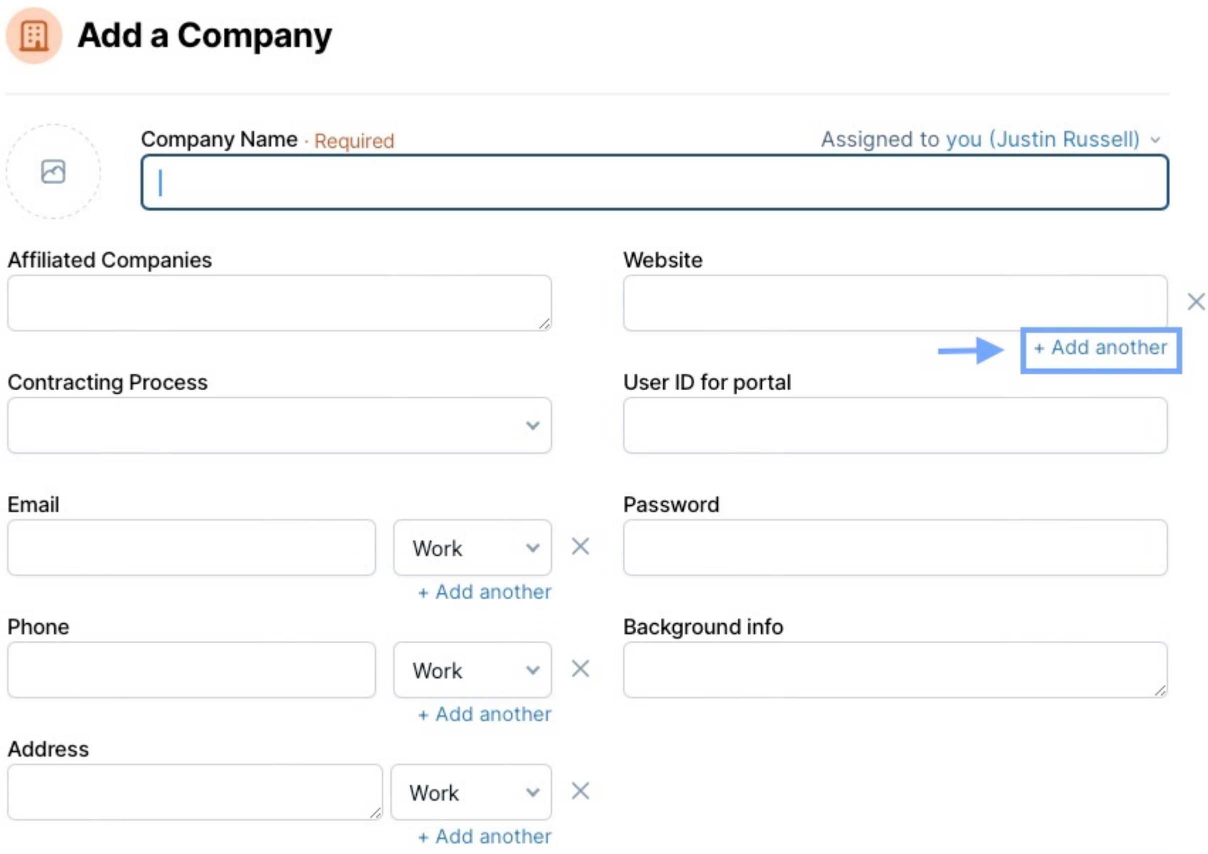
Always click on Apply Filter to see the results.

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***

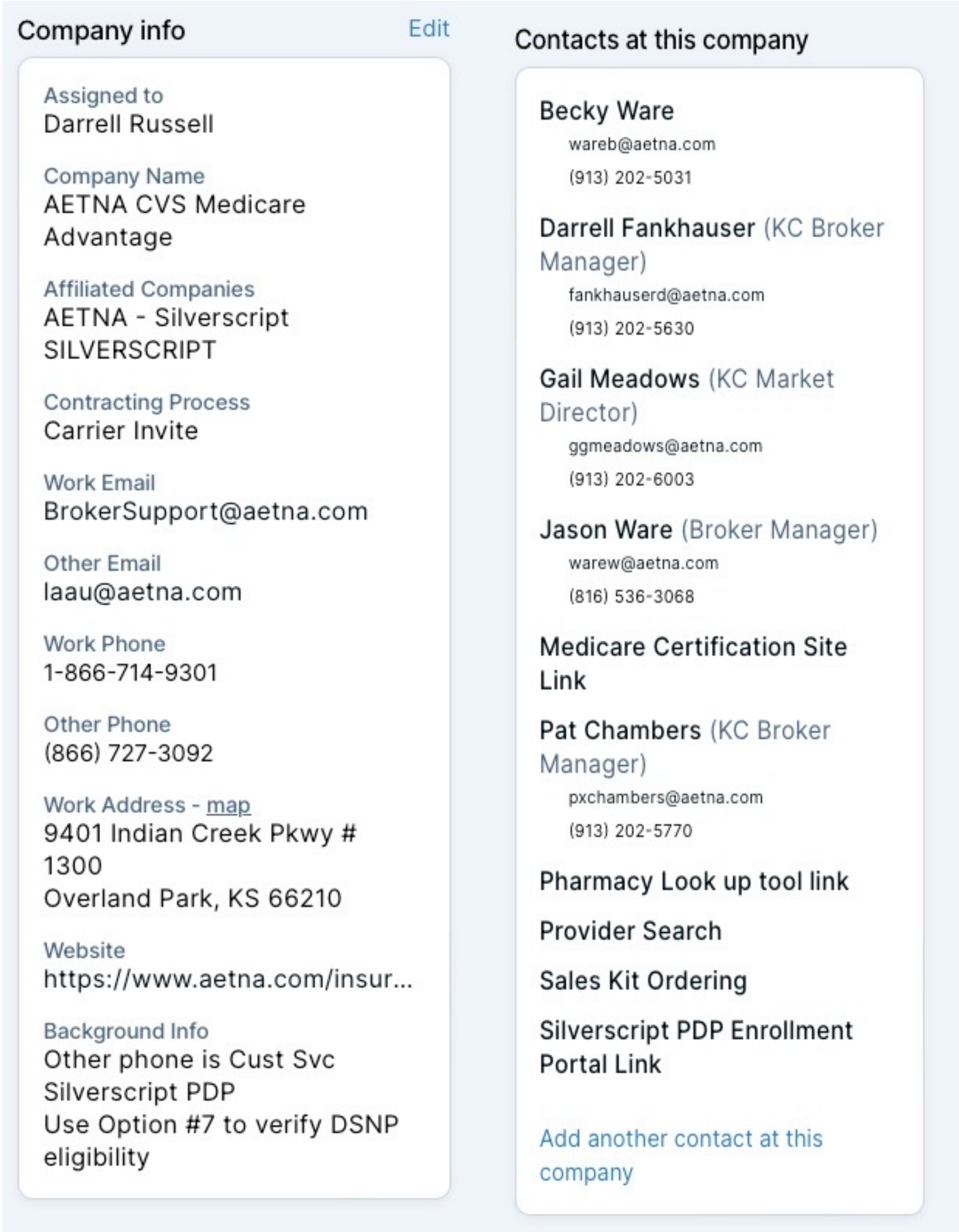




Use the + Add another option for website since carriers have different websites for BOB, certification, pharmacy look up and others. You can add several websites for a company.

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.



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.