Trusty Select Pro Support Portal Guide

Summary: This document contains the instructions for the proper use and functionality of your Customer Portal for Trusty Select Pro!

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Getting Access & Setting up your Password

1. If you do not have a Customer Support Portal account, you can request one by emailing: allison@trusty.care. After your account is added, you will get an email with the following characteristics:

Subject Line: Create a password for Trusty Select Pro

Body:

Your user account for the Trusty.care Customer Support Portal has been created. This will give you the knowledge and support to address your issues and concerns.

This portal will allow you to:

1. Create a support ticket for questions or issues

2. View training videos

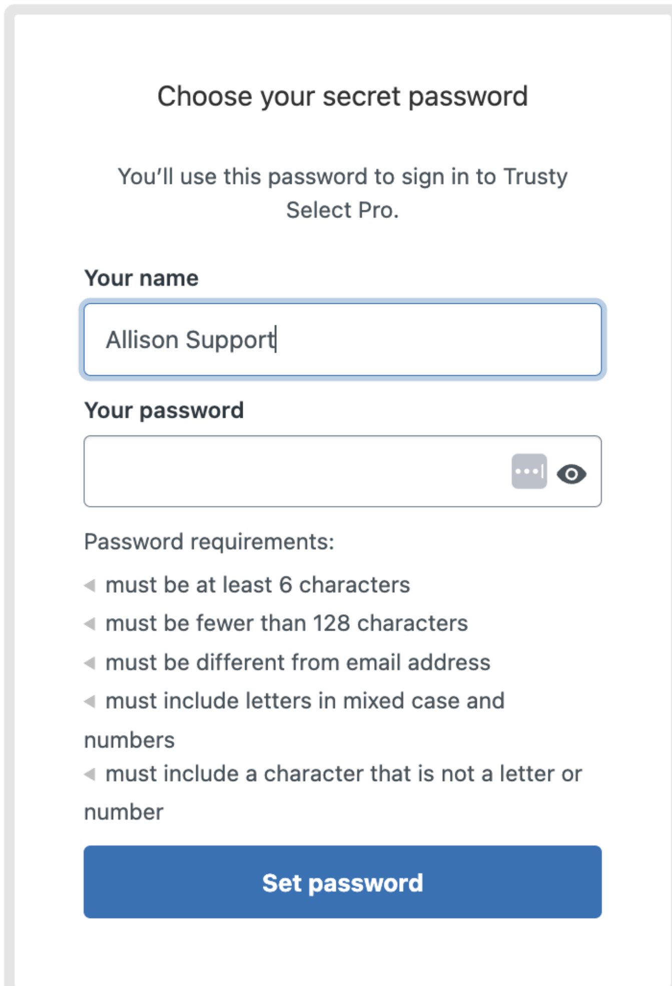
3. Search the Knowledge Base for helpful information to solve issues or answer questions 4. Help make the product even better by submitting enhancement requests to our team for future consideration

So as you know, this is a different login and password than the one you use to access Trusty Select Pro or Trusty Back Office Pro.

To finish setting up your Customer Support Portal account, click the link below to create a password and sign in to the Customer Support Portal.

Create a password

2. Click on the “Create a password” link, enter your full name and a secure password.



3. As a reminder, you can make this password the same as your password for signing into Trusty Select Pro, however, keep in mind that this is not the same as logging into Trusty Select Pro. This logs you into the Customer Portal.

4. Click ‘Set password’. This will take you to the main screen of the Customer Portal

Create a Case for Support

1. From the home page of the portal, click ‘Submit a request’ from the top menu bar.

2. Choose a category

Submit a request

Drugs/Pharmacies/Doctors

Quoting/Comparing Plans

Direct Enrollment

RingCentral

Other (such as Bulk Upload, Batch Processing, Beneficiary Profile, A La Carte requests, etc)

3. Fill out the form as follows:

- Subject: Should be a brief description of your issue
- Complete all the prompted fields
- Description: Please provide as many details as possible of the issue or question that you have.
- Attachments: This is an encrypted portal and meets HIPAA compliance standards for privacy and security. Please post a screenshot of the error message you received, the quote in question, etc. This information helps our Support Team recreate and troubleshoot your issue.

Access Your Prior Cases Logged with Customer Support

1. Next to your name in the top right corner, click the down arrow
2. Click 'My activities' from the drop-down menu.

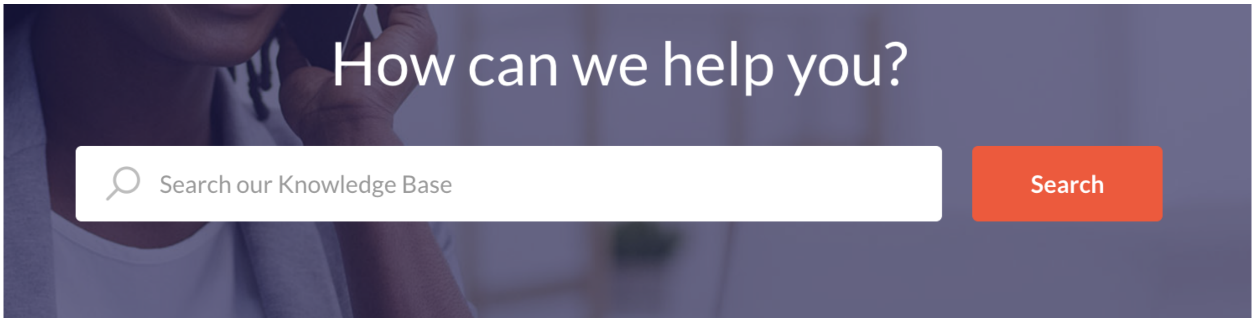
3. The first screen you will come to is "My Requests." This will show all of your requests to Customer Support.
4. Click "Requests I'm CC'd on" to see any cases that you have been CC'd on by other agents within your organization.
5. Click "Following" to see all articles, pages, or cases you are following.

Adding a Comment to a Case

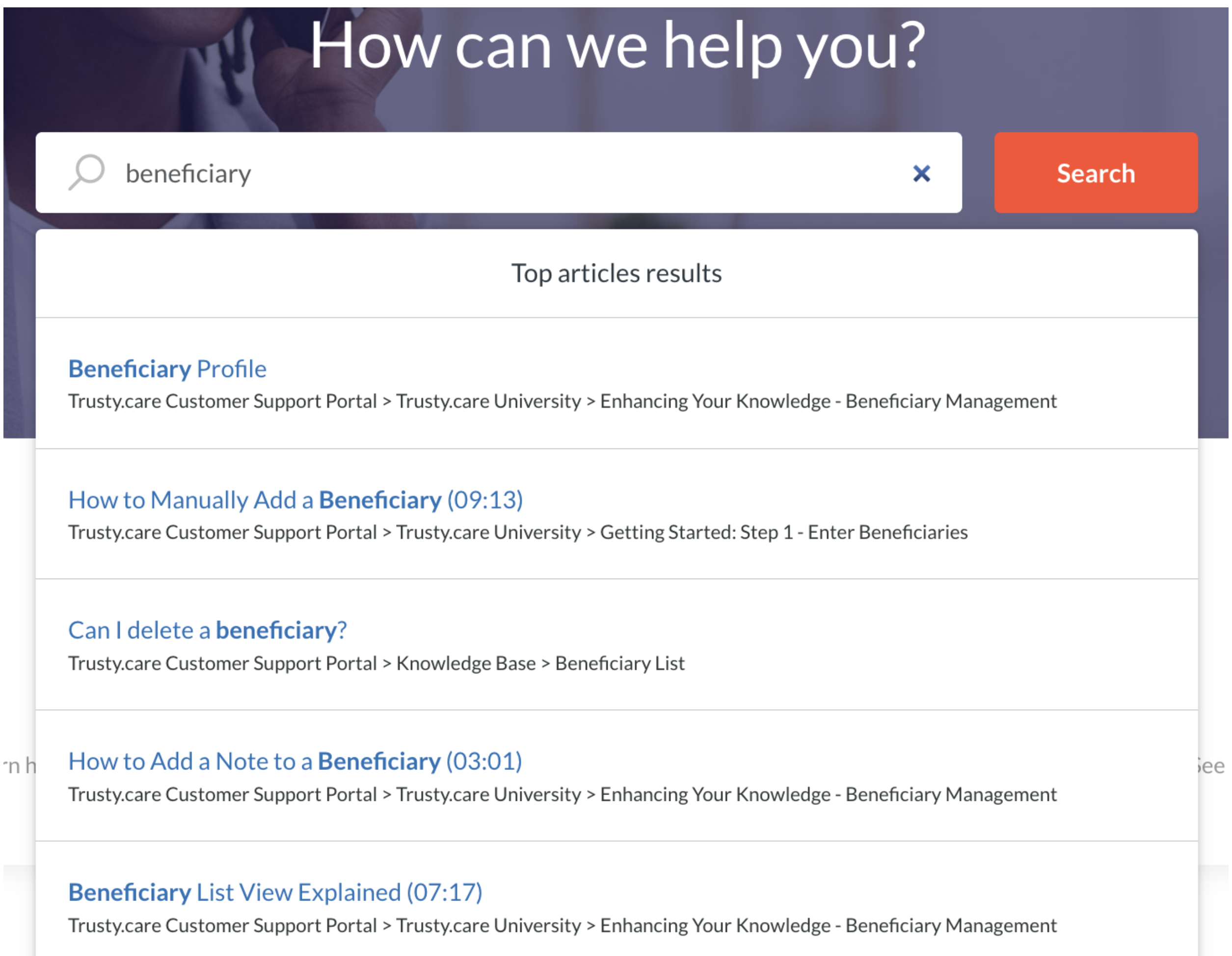
1. Click on the down arrow next to your name in the top right corner
2. Select 'My activities' from the drop down menu.
3. This will show all of your current requests. Find the request that you want to add a comment on.
4. Click on the title of the request you want to add a comment to
5. Type within the text field box, this will enable you to type additional information for the support analyst. Click Submit once you are finished typing so the comment is added to the case. The Support Analyst is notified that a comment has been made on the account.

Searching the Knowledge Base

1. Click on the field in the middle of the screen labeled “Search”



2. In the “Search” field, begin typing key words for what you are searching for. As you type, articles that pertain to what you are typing will be shown. Click on the one you want to explore further.



3. You can always access our full library of knowledge articles by clicking on the Knowledge Base icon on the home page. This will take you to articles, organized by category, with step by step instructions on how to use Trusty Select Pro.

Knowledge Base

Beneficiary List

- How to export your book of business
- Can I delete a beneficiary?
- Can I export my Book of Business?
- Entering MDs, and Pharmacies from the Profile
- How do I know which of my clients I sent a Medication Update email to?
- If a beneficiary logs in multiple times and each time updates their medications, does it cause duplication in the system?

See all 7 articles

Beneficiary Profile

- Printing your client's drug list and other profile information
- When adding a new beneficiary, it will not allow me to Save and Continue
- I am unable to find a doctor
- What drugs are NEVER covered by Medicare?
- How to enter an email for clients who do not have email address
- How long are documents stored in the beneficiary profile?

See all 8 articles

Bulk Upload and Batch Processing

- How do I get to the Batch Processing screen?
- Bulk Upload - Important information regarding required fields and quoting
- Batch processor shows "Needs reprocessing" for a beneficiary
- Upload Your Book of Business - How We Can Help

Enrollment

- Direct Enrollment Writing Agent ID
- The Actions menu does not have 'Enroll'
- Error: There was an error starting your enrollment, please retry
- How do I know whether to submit as beneficiary or broker
- Can I submit a test enrollment to see how it works?
- Starting an Enrollment

See all 10 articles

Frequently Asked Questions

- What is a Critical or High Ticket
- Customer Support Guide
- Is it possible for two people to be working in the system at the same time?
- Blue Button - First import, what information is pulled over?
- Customer Portal Use Instructions
- Creating an enhancement, commenting on or voting on an enhancement

See all 12 articles

Internal articles

- Setting up the Forward all calls feature in the RingCentral app
- Broken Broker Portal Link Process
- FMO Onboarding Site
- Internal: Broker cannot remember beneficiary TSP password
- Internal: Blue Button Dummy Login Sheet
- Internal: Communicating the enhancement/Feature Request process

See all 7 articles

Logging into Trusty Select Pro

- Unable to bypass Welcome to AEP 2023 pop up message
- How to access your prior cases logged with Customer Support
- Completing the Producer Onboarding form - Which product do I select?
- White screen shows after login
- How does a returning user log in?

Plan View and Quoting

- Part D details screen explained
- View details is greyed out
- Our Drug Pricing vs. Medicare.gov
- Initial phase monthly totals do not add up to the copay amounts
- Medication showing 'not covered' when running a quote
- How do I see the Part B giveback amount?

Producer Dashboard

- Understanding the Producer Dashboard

4. You also have access to our comprehensive video library by clicking on the University icon on the home page. This will take you to our Trusty.care university with videos, organized in order of the typical Trusty Select Pro workflow from start through enrollment.

Trusty.care University

View training videos and register for learning labs!

Getting Started: What do you need to know first?

- Are You Ready for AEP?
- How is our drug pricing determined?

Getting Started: Step 1 - Enter Beneficiaries

- How to Manually Add a Beneficiary (09:13)
- How to Bulk Upload Your Book of Business (10:55)

Getting Started: Step 2 - Update Medications

- POA - Blue Button 2.0 Authorization (06:30)
- Medication Update on Behalf of Your Client (08:56)
- Sending the Medication Update Email to All Clients (01:53)
- Medication Update via The Blue Button (13:01)
- Blue Button Sync from the Beneficiary Profile (03:48)

Getting Started: Step 3 - Quoting and Batch Processing

- Plan Quoting & Comparisons (16:36)
- What is Instant Plan & Rx Review?

Getting Started: Step 4 - Scope of Appointment

- How to send a Scope of Appointment (Text or Email)

Getting Started: Step 5 - Digital Enrollment

- Direct Enrollment - How To, includes video demonstration (21:14)
- Direct Enrollment - Beneficiary Flow
- Direct Enrollment - Broker Flow
- Direct Enrollment - Broker Expectations

Enhancing Your Knowledge - Producer Management

- How to Configure a Producer Profile (06:51)
- Understanding Producer Creation (10:18)
- How to Resend the Onboarding and Password Creation Email (02:34)
- Completing the Producer Onboarding Form (06:14)
- How To Use Activity History (02:01)

Enhancing Your Knowledge - Beneficiary Management

- Beneficiary Profile
- Beneficiary List View Explained (07:17)
- How to Unarchive a Beneficiary (01:20)
- How to Add a Note to a Beneficiary (03:01)
- How to Upload a Document (01:16)

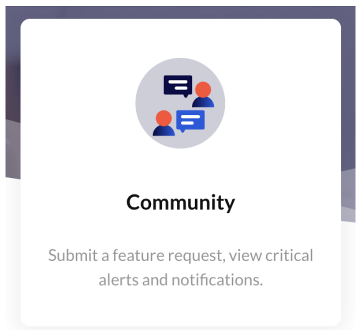
Learning Labs

- Learning Lab - 9/29/2022
- Learning Lab 9/22/2022
- Learning Lab 9/15/2022
- Bulk Upload and Batch Processing Tips and Tricks (36:40)

Notifications & Critical Alerts

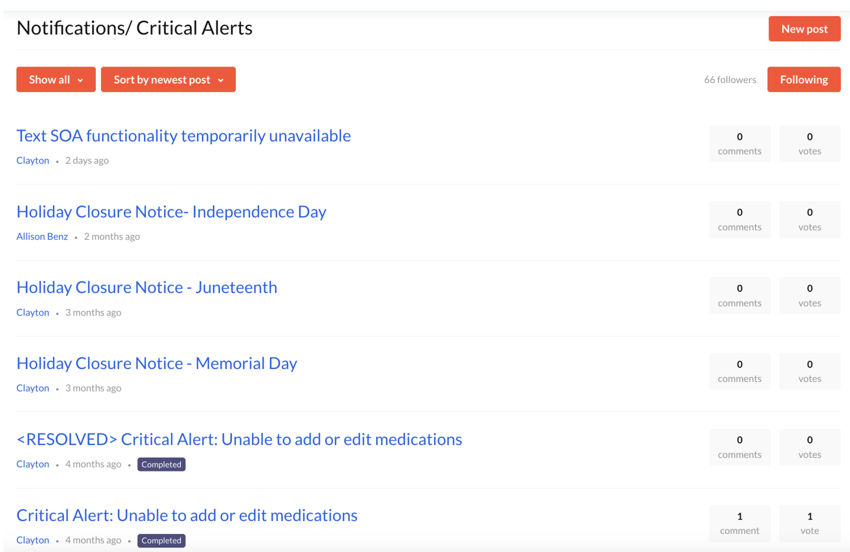
For the most up to date information and alerts from the Trusty Select Pro Support Team we recommend that you “Follow” our Notifications/Critical Alerts page.

1. From the main portal page, click “Community” below the search bar



2. Click “Notifications/Critical Alerts

3. This will bring you to a view of all the notifications and alerts that have been posted within the last year.



4. Click “Follow” on the top right of the screen. By following this page you will be notified as soon as a new post is created. Topics include holiday closures, issues we are currently working on solving, as well as release notes after an enhancement release.

Trusty.SelectPro