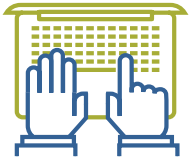# InTouch for Agents

A guide to help you manage your book of business

InTouch is PacificSource's online portal for agents. Use it to enroll members, run your book of business, access sales materials, and more on your computer, mobile phone, or tablet.

Contents:

To access InTouch for Medicare Agents, visit Medicare.PacificSource.com.

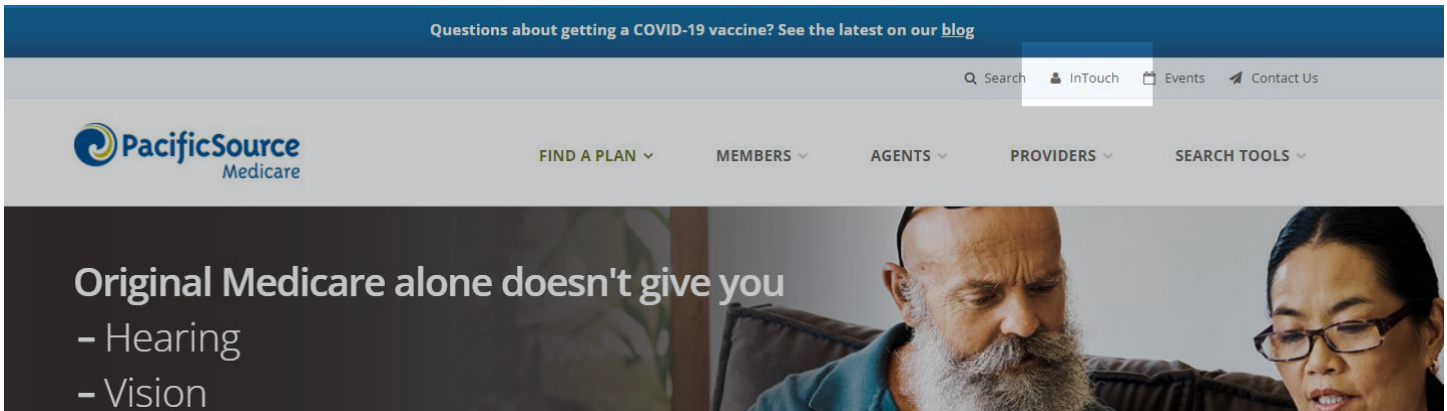## Questions? We're here to help.

Contact the Medicare Broker Services team:

Email: MedicareBrokerServices@PacificSource.com
866-419-0065, Monday - Friday, 7:00 a.m. – 5:00 p.m. Pacific Time
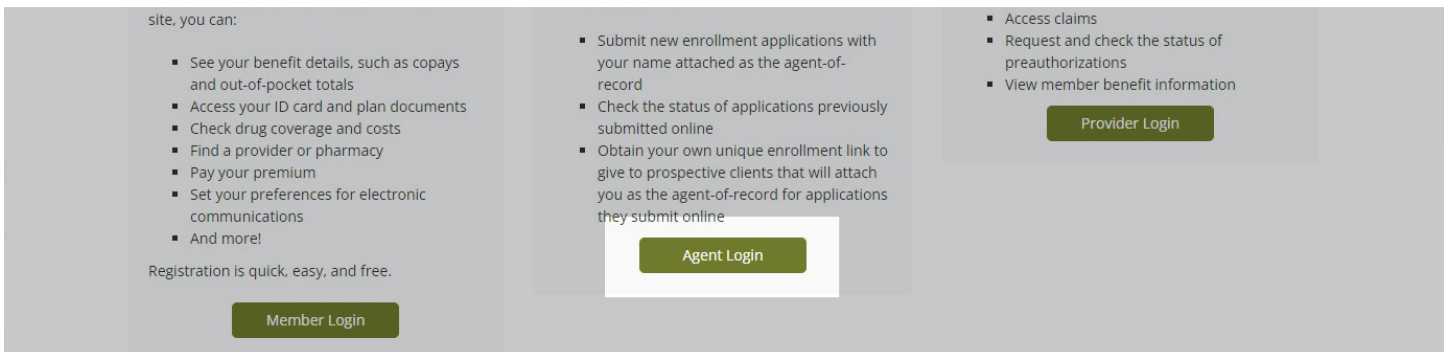**TTY: 711.** We accept all relay calls.

PacificSource
Medicare

Log in to your personal InTouch portal

1. Go to **Medicare.PacificSource.com**.

2. Click on **InTouch.**

3. Under **InTouch for Agents**, click **Agent Login.**

4. Sign in. For your **Username:** Enter your first and last name as it appears on your license, with no spaces (e.g., JohnSmith), upper and lower case.

    *   **Password:** Enter your PacificSource Medicare producer number with 01 at the end (e.g., PM0999901), upper case "PM."
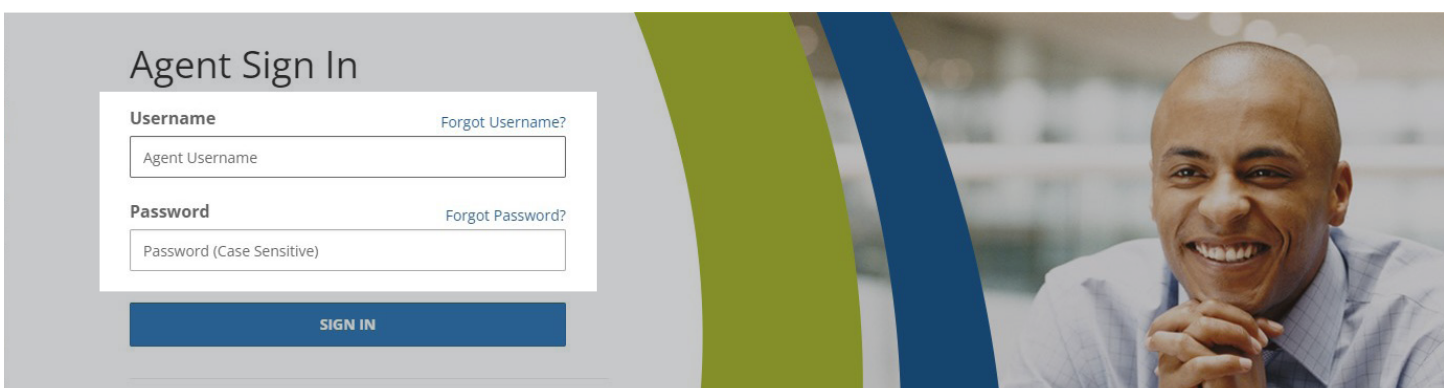
- Change your password after your first login by clicking **Profile** at the top right of the page.
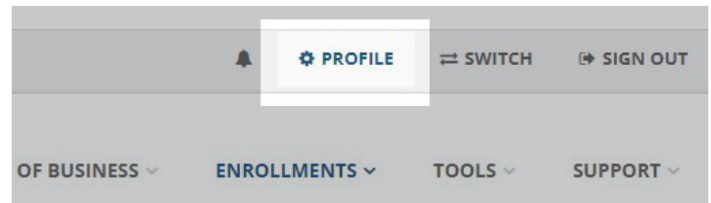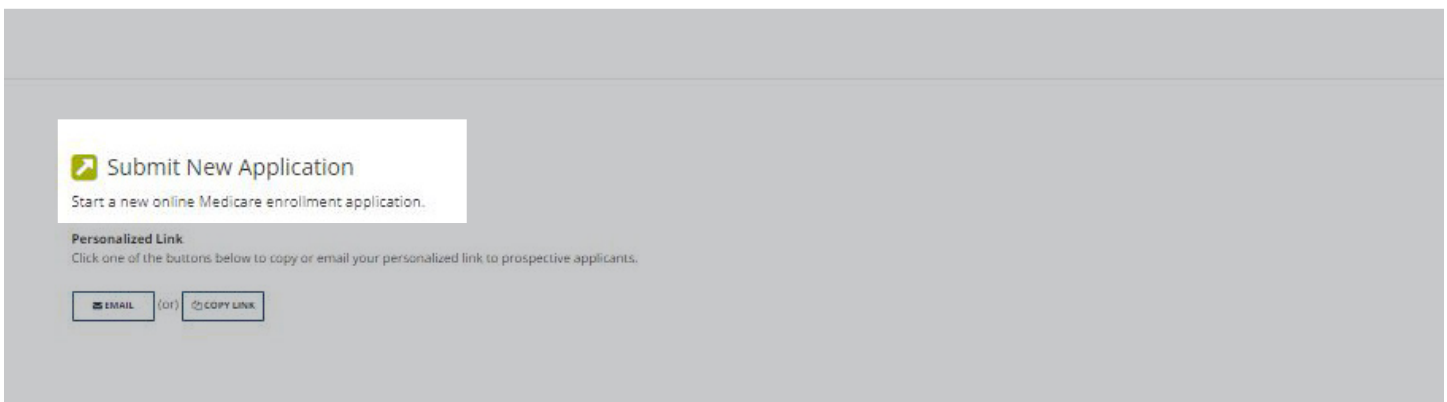

- **NOTE:** You can switch between your Medicare and Commercial accounts by clicking **Switch** at the top right of the page.
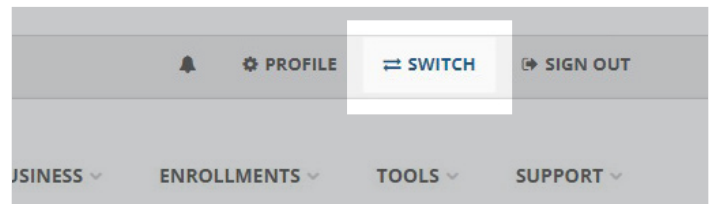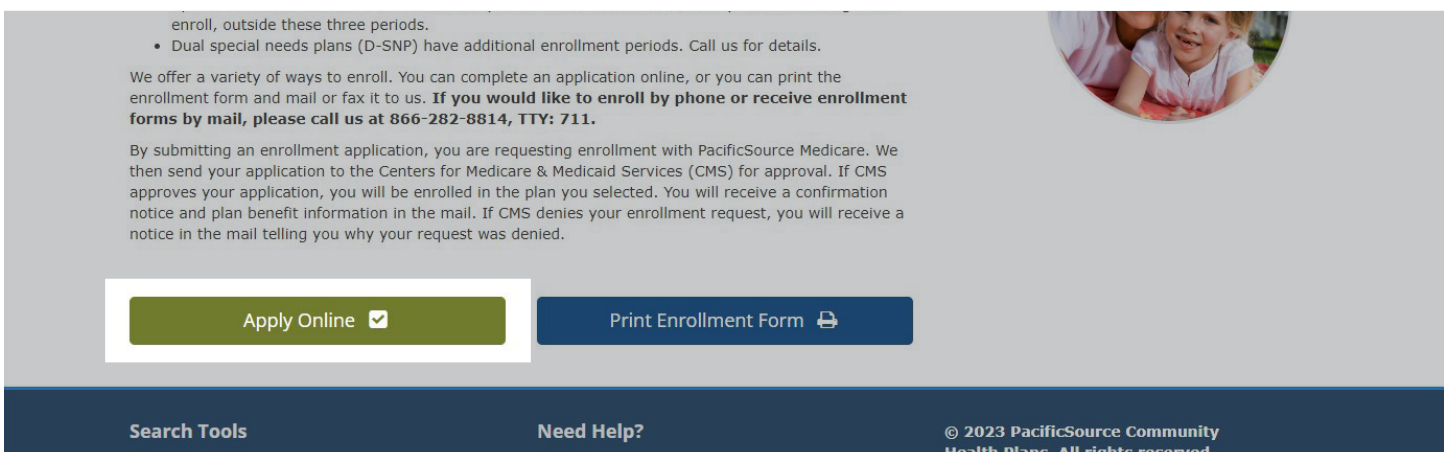

Submit online applications

Agent completes application:

1. Click **Submit New Application**.

2. Click **Apply Online.**

3. Follow the instructions to complete the enrollment process.

4. A confirmation number will be displayed once enrollment is complete. Please provide this number to your client. **You can view and download a PDF of the completed application to confirm that your name is on the application.**

Client completes application:

Under **Personalized Link,** click *either:*

- **Email:** To send your client a Personalized URL (PURL) in a pre-populated email, see below

  OR

- **Copy Link:** Copy your PURL to paste into an email to your client

Sample of pre-populated email with PURL:

NOTE: If the client completes the application using this link, you will be included as the agent of record.

Review, download, and print applications,
including DocuSign Applications

NOTE: InTouch stores only those applications that were submitted through InTouch. Electronic applications submitted outside of your InTouch account, paper applications, or applications submitted through a third-party website like Connecture or SunFire, will not appear in your portal.
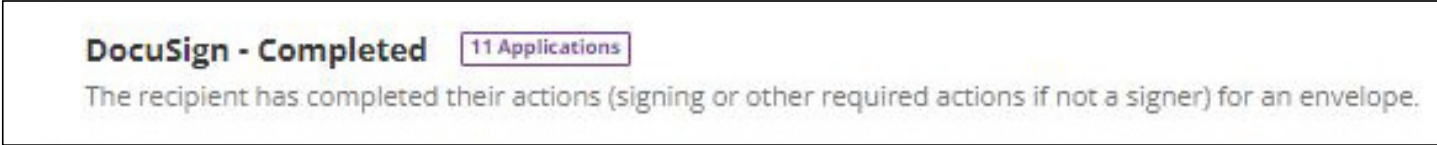
1. On the InTouch landing page, select **View/Print InTouch Applications**.
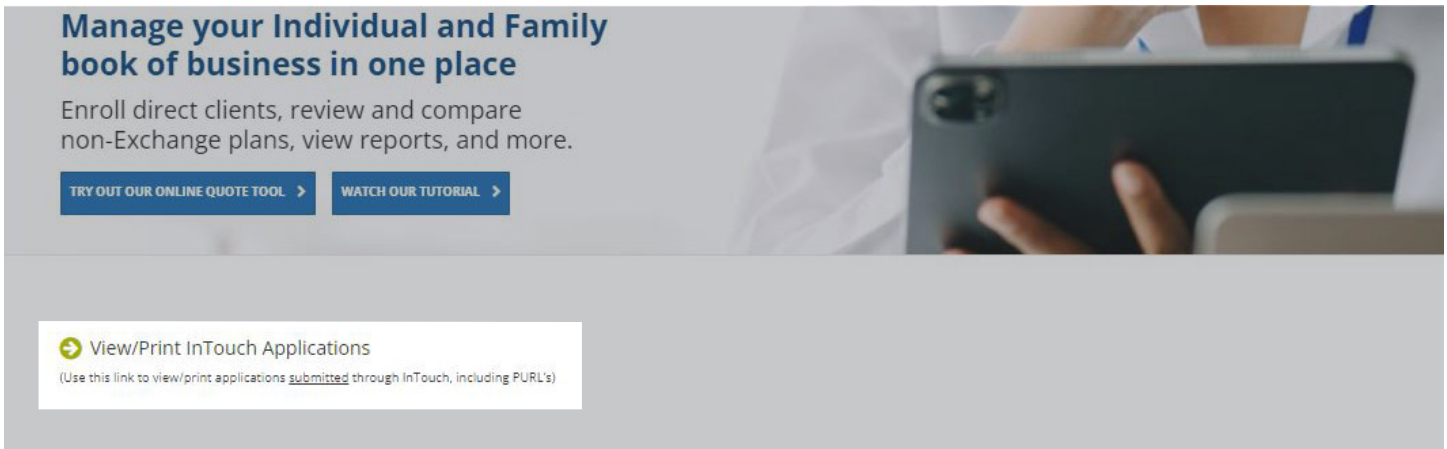
2. From this screen, you can select the appropriate category to review, download, or print applications that have been **received, enrolled,** or **rejected by CMS**.
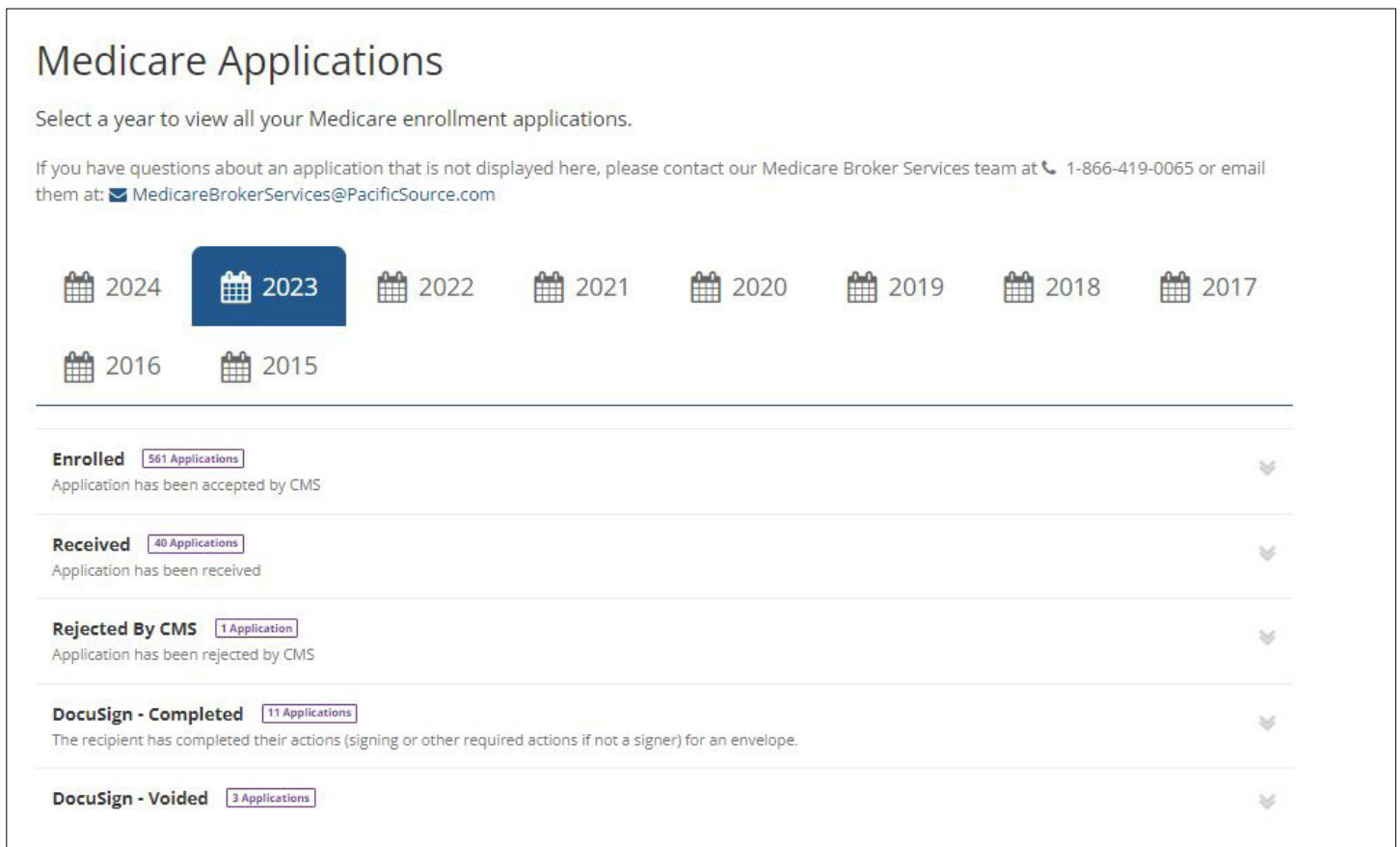
3. To download, view, or print a DocuSign application, click **DocuSign - Completed**: Double-click a client's name/record. The client's application will appear under the **Downloads icon** in the upper right of your window, or you can navigate to your Downloads folder to find the application.

DocuSign - Completed [11 Applications]

The recipient has completed their actions (signing or other required actions if not a signer) for an envelope.

4. View or print DocuSign applications:

    a. Right-click on "Open file" under the member's name in the upper right of your window.

    b. Click on "Show in folder" from the dropdown menu.

    c. Select "Open with" and then select "Choose another app."

    d. Select Windows Photo Viewer or a similar app to view or print the application.

TIP: Set your computer to open your DocuSign applications in Windows Photo Viewer (or a similar app) by default.

    1. Right-click the downloaded application.

    2. Select "Open with" and then select "Choose another app."

    3. Select Windows Photo Viewer or a similar app.

    4. Check the box for "Always use this app to open TIFF files."

    5. Click "OK." Now, you can simply double-click application files to open them.

NOTE: The steps above will be required only once. After the initial setup, you will not need to repeat these steps.
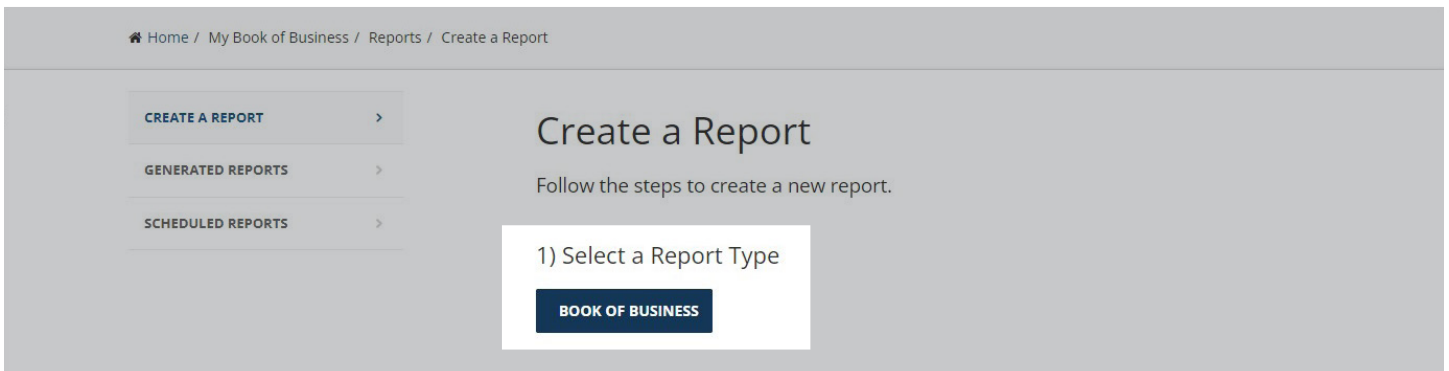
Run a book of business report

NOTE: This report will include **all of your active clients**, regardless of how the application was submitted.
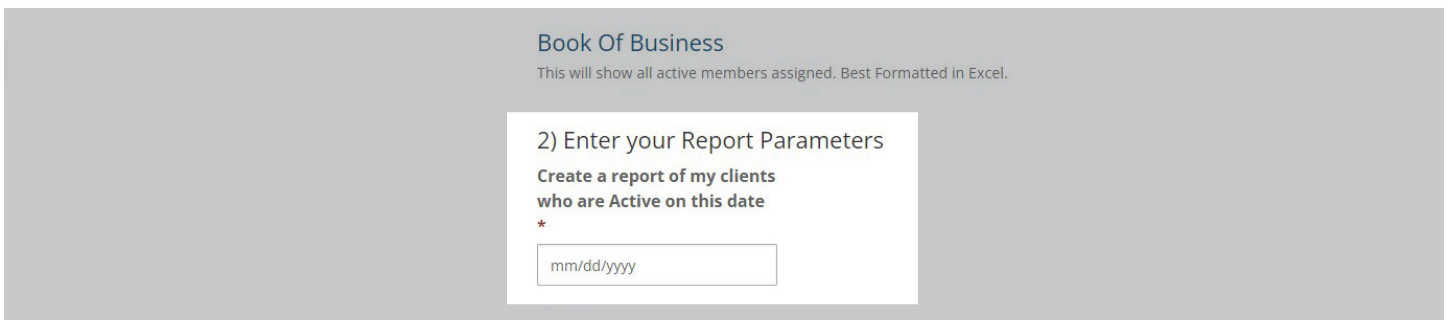
1. Under **My Book of Business**, click **Reports.**
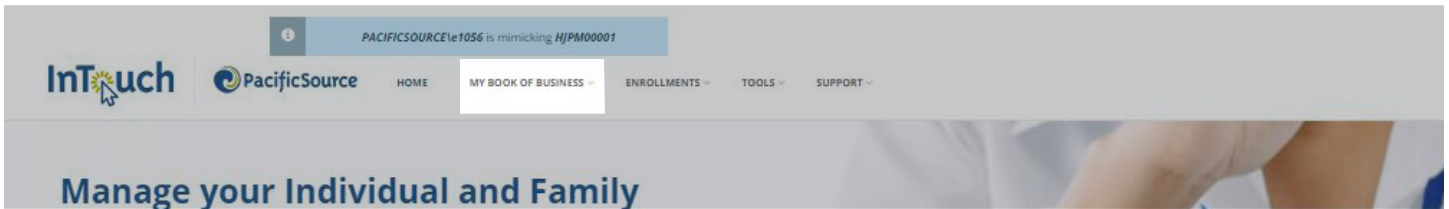
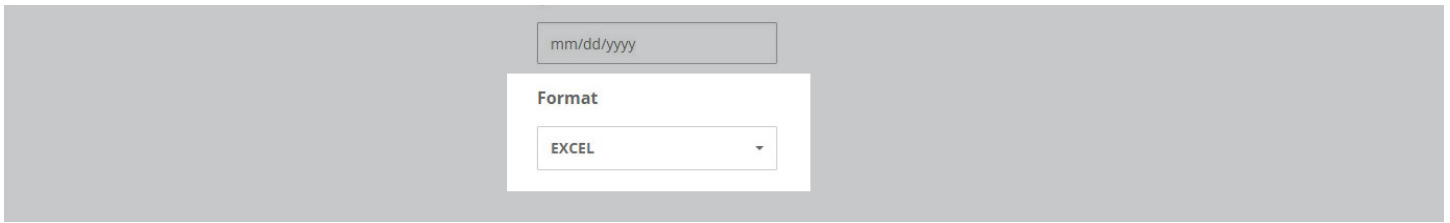2. Click **Book of Business** under **Select a Report Type.**
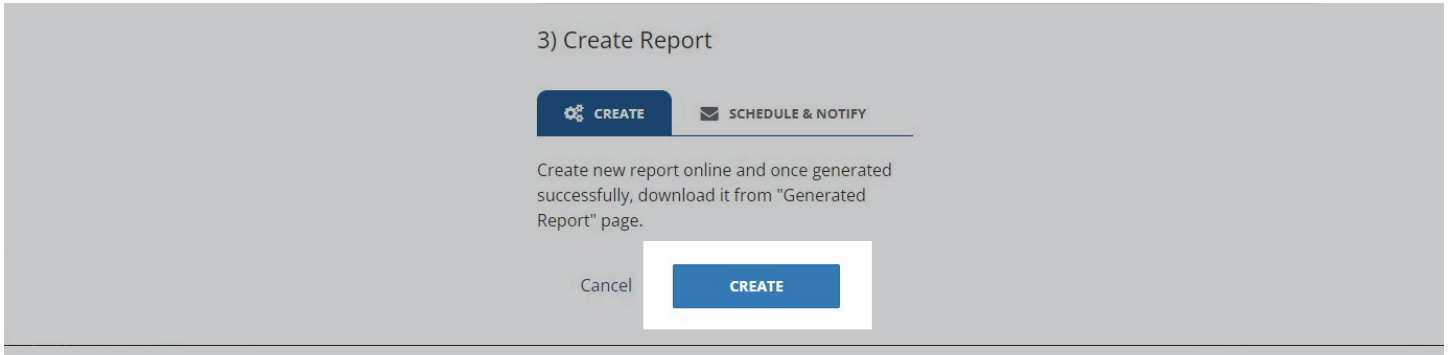

3. Enter a date.

NOTE: The book of business report will reflect **all of your clients** who are or will be **active** on the date entered, regardless of how the applications were submitted. We recommend entering a date at least two months in the future so the report includes applications that have been submitted but are not yet effective.

4. Select a format type (PDF or Excel).

5. Click the blue **Create** button to download your book of business report.

Coverage provided by PacificSource Community Health Plans