pinpoint
GLOBAL COMMUNICATIONS

Medicare Advantage Training & Contracting System FAQs

Executive Summary

Pinpoint Global currently provides more than 30 health plans solutions that automate and integrate data from Medicare Advantage training and contracting processes. The data from these processes is integrated into the Plan IT and operations systems through data feeds and system APIs.

Pinpoint's solutions provide the following capabilities to their Health Plan partners.

The industry's most cost effective, highest value-added online Medicare training and certification solution

- Pinpoint's National Medicare training courses created and authored by a health plan — BlueCross BlueShield of Minnesota.
- Integration of agents' AHIP and Gorman National training completions.
- Pinpoint's solutions are delivered through a reliable and efficient software-as-a-service model (SaaS).

Automation and integration of data generated by multiple business processes, including the following:

- Agent license and background checks.
- Automation of agent and agency annual contracting process, supporting online fillable forms (e.g., contract, EFT and W9 forms) and e-signature.
- Data feeds (sent nightly to Health Plan IT systems) containing agent completions, contract, licensing and compliance information, etc. captured on the Pinpoint Medicare system.

General Questions

Explain your pricing model?

- One-time set-up fee (dependent on site's functionality) for dedicated Health Plan website for hosting training content and user training records.
- There is also a monthly user-fee based on site user population.
- Pinpoint also offers course and exam authoring services to transform client provided PowerPoint courses and spreadsheet-based exams into online, trackable content and exams. Prices for these services range from $500 to several thousand dollars depending on the length of the course and whether it includes voice over audio or integrated video.

What is the implementation timeline?

The implementation timeline is 30 – 45 days after sign-off by client of functional specification.

What are Pinpoint vs. Health Plan responsibilities?

The Health Plan is responsible for business requirements and user acceptance testing (UAT) — the last step before production deployment. Pinpoint translates Health Plan business requirements into a functional specification which once signed-off by Health Plan, directs Pinpoint engineering on what to implement. When Pinpoint engineering completes its tasks, they deploy to QA for Pinpoint to test and validate site functionality prior to deploying the site to UAT. Once Health Plan signs-off on UAT, Pinpoint schedules and deploys the site to production.

What are the technical requirements?

Pinpoint provides its services using a software-as-a-service (SaaS) model utilizing standard database, internet and browser technology. No special hardware or software is required.

What kind of technical support do you provide?

Pinpoint supports a 24x7 ticketing system and toll-free phone number.

Is Health Plan assigned a direct Pinpoint contact/project manager?

Yes, each Pinpoint Health Plan client has a dedicated contact/project manager.

Can Pinpoint provide Health Plan references for its services?

Yes, upon request Pinpoint will provide Health Plan client references for both its training and certification services as well as its contracting and process integration solutions.

Administration Questions

Do you provide any of the Medicare MA-PDP agent training content?

Pinpoint provides a MA-PDP course through its partner BlueCross BlueShield of Minnesota.

Who is responsible for obtaining CMS approval for the agent training content?

Pinpoint and BlueCross BlueShield of Minnesota manage this process.

What reports/information can be accessed by Health Plan?

Authorized Health Plan personnel will have real-time access to all reports in the system through the Pinpoint system's reporting console, including; user profiles, course completions, track completions and other Health Plan specific reports configured in the system.

What kind of access will Health Plan have in Pinpoint?

Authorized users will be placed in groups in the system. Each group will have access to system functionality based on the rights of the group(s) to which they belong.

When an agent requests support on the Pinpoint site where does the email go? Pinpoint or Health Plan?

First line support requests are typically routed to the client help desks. It they are unable to close a request, they open a ticket in the Pinpoint 24x7 online ticketing system. Pinpoint support personnel will then resolve the issue and close the ticket.

Who makes the determination if AHIP training can be accepted in lieu of taking the Medicare Training through Pinpoint — can Health Plan decide or does Pinpoint?

Uploaded AHIP certificates are routed to an administrative work queue in the system. Based on Health Plan requirements, either Health Plan or Pinpoint will be responsible for accepting or rejecting agent AHIP, Gorman and other client accepted certificate uploads.

How is course content loaded?

Course content is loaded through a simple interface in the administration section of the Pinpoint system. Course uploading and administration can be done by Health Plan administrators or Pinpoint personnel.

How are certificates of completion created to send to agents?

Agents have real-time access to certificates of completion from their transcripts in the Pinpoint system.

How are messages for agents created?

Notifications and other messages are (typically) generated and sent from the Pinpoint system based on requirements from Health Plan.

What opportunity is there for customization?

There are many customization opportunities on the site. For example, clients can customize styling, fonts, logo, text panels, messaging, etc.

How are CE credits managed?

CE Credits are managed through Pinpoint's partner, National Underwriter. Pinpoint can/will demonstrate to Health Plan when appropriate.

How are agents initially loaded into the system?

Clients can upload preregistered users via an administration page and can bulk import them via spreadsheets. Optionally this can be upgraded to be processed by an inbound user feed.

For ongoing agent maintenance, how are agents added/terminated in the Pinpoint system?

There are multiple mechanisms for adding or deleting agents in the system including through processing of data feeds, uploading spreadsheets and manual administration of agents' status (active or inactive) by either Health Plan or Pinpoint administrative personnel.

Multiple Certification Offerings through Pinpoint

Can agents use one log-in/password for trainings offered from two different plan sponsors?

Yes, if the system is configured to support this functionality.

Can the Medicare training that is offered be used for both MA & PDP?

Yes, many Pinpoint clients offer separate MA track(s) and a PDP track in the system with appropriate training courses configured in each track.

Will the system recognize when an agent has completed Medicare Training for PDP and provide credit to the agent for both MA & PDP?

Yes, credit will be given as the training requirements for each has been completed by agents. Agent "credit" includes the ability for agents to generate and print a certificate of completion. Pinpoint also provides completion data feeds to client IT and operations systems

Agent Contracting through Pinpoint

Does Pinpoint provide agent contracting support?

Yes, Pinpoint provides a comprehensive set of functionality for health plans to contract their agents, including the following:

- Agent background and license checks.
- Health Plan specific online fillable forms for agent completion and submission of Health Plan contracts, commission declaration(s), E&O certificates, W9 forms, EFT forms, Agency/FMO affiliation declaration(s), etc.
- All forms support agent attestation and e-signature functionality that ensures all submitted forms have been appropriately completed and submitted in-good-order by agents.

How do health plans review and approve agent submitted contracting documents?

Pinpoint provides a comprehensive submission and review process for all submitted agent (online) forms. The process supports Health Plan defined workflow rules that ensure submitted forms are transferred to appropriate administrator work queues for review and approval/denial of agent submissions.

Does Pinpoint provide visibility into the status of agents contracting process?

Yes, like all training and certification functions in the Pinpoint system, Pinpoint's online contracting functionality provides real-time reports that enable authorized Health Plan personnel to look-up individual or groups of agents' status relative to completing the contracting process.

Can agent contracting status be integrated into health plan IT and operations systems?

Yes, Pinpoint can provide agent contract status information to Health Plan IT and operation systems through nightly data feeds or real-time data transfer via integration with Health Plan system APIs.

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