MEDICARE SOLUTIONS



GETTING STARTED WITH MUTUAL OF OMAHA

Medicare Supplement | Dental

Mutual of Omaha
Protect Your Kingdom

For producer use only. Not for use with the general public.

627401

Revised June 2025

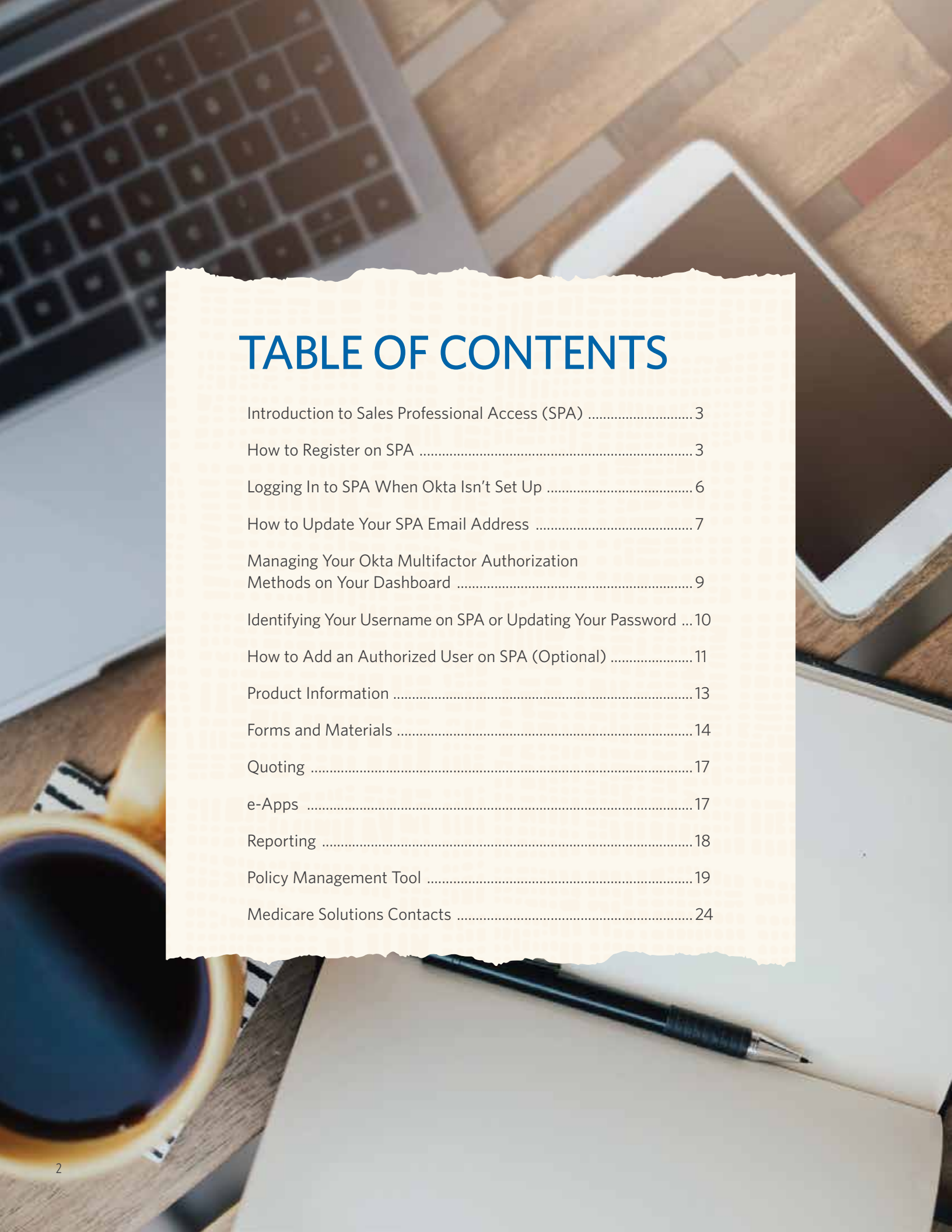


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Introduction to Sales Professional Access (SPA)

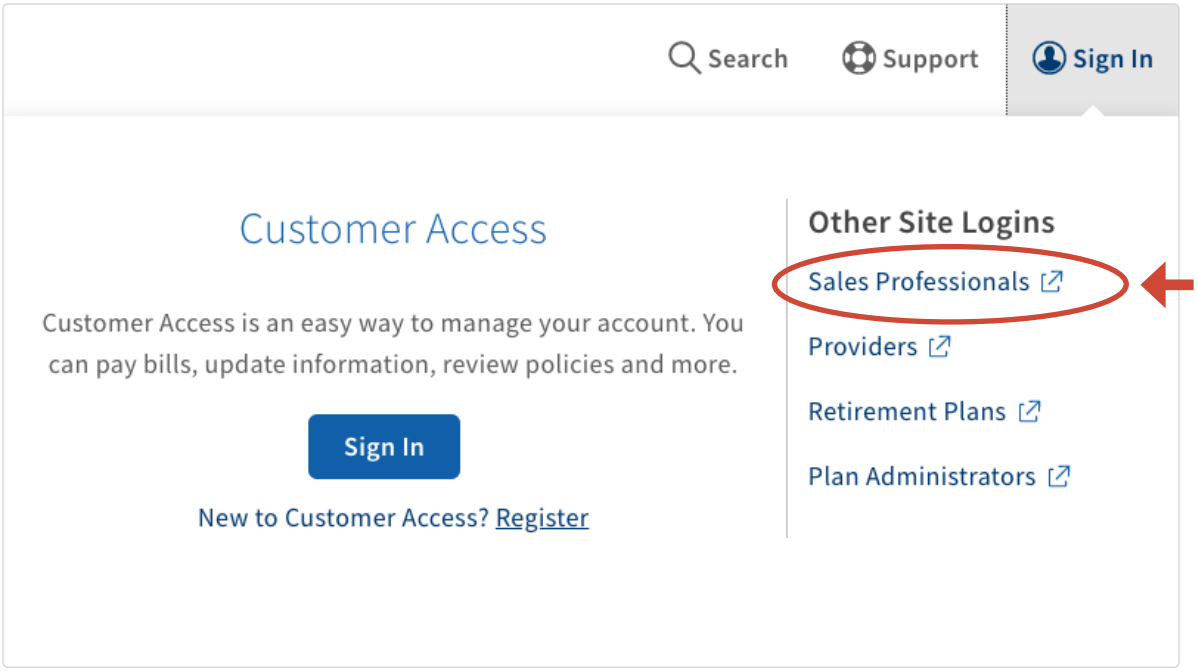
SPA is your one-stop shop to find all the resources you need at Mutual of Omaha.

After logging in you can find:

- Product information and sales ideas
- Training tools
- Downloadable PDFs of all forms and marketing materials
- Quoting software
- e-Applications
- Business management tools
- Reports

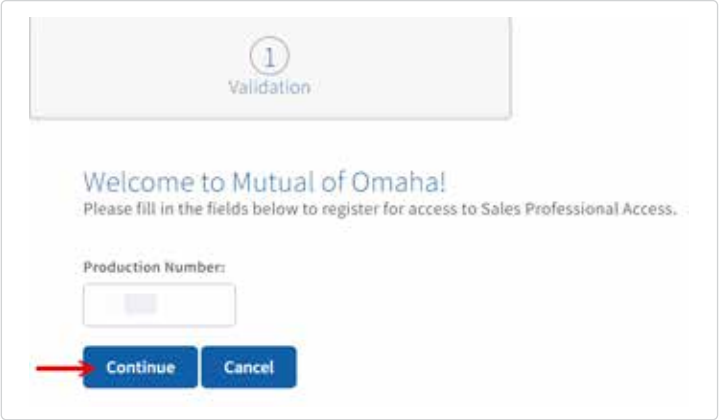
How to Register on SPA

- Open your web browser (Chrome, Edge, Firefox or Safari) and enter **mutualofomaha.com** in the address bar.
- Click on **Sign in** and choose **Sales Professionals**.



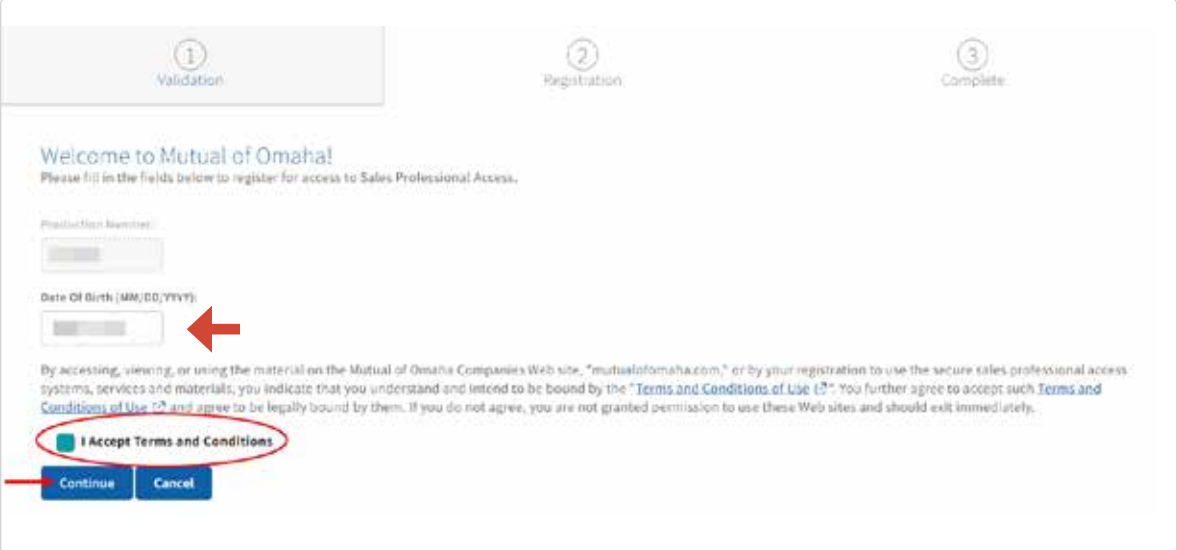
If you have a corporation production number and an individual production number, you must register the corporation production number first. Once the corporation is registered, log in to SPA using the corporation credentials, hover over the profile icon in the upper-right hand corner and select **Profile**. When prompted, enter your personal production number and date of birth. The next time you log in, you'll be presented with two entitlement options: one for the corporation and the other for your personal production number.

- Enter your production number in the text box and click **Continue**.

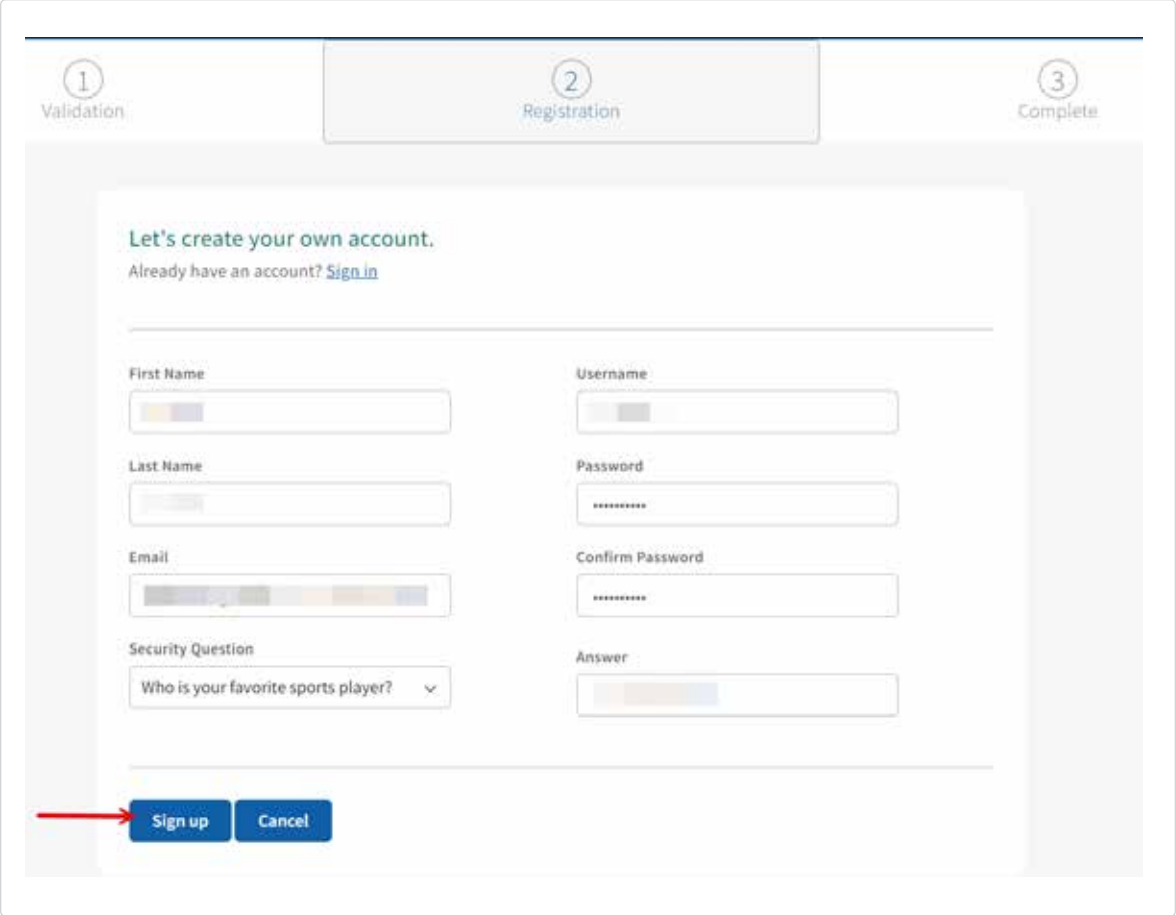


It's important you complete all fields on the registration form.
Note: The **Continue** button will not be enabled until all required fields have been completed.

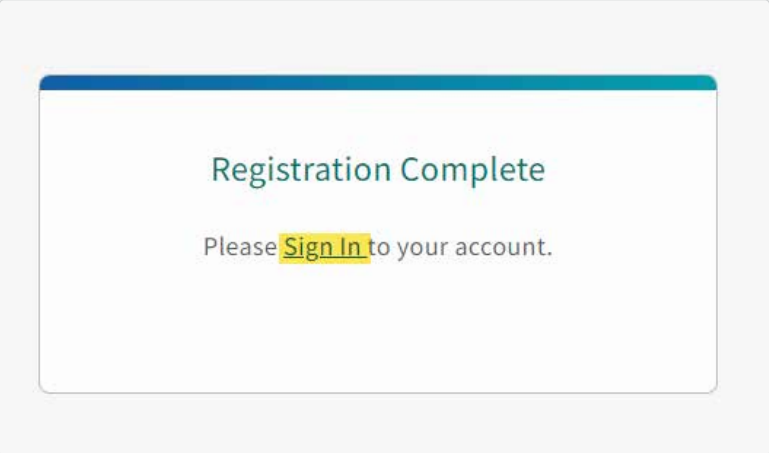
- Enter your **Date of Birth** and check the **I Accept Terms and Conditions** box and click **Continue**.



- Create your account by answering all questions. Then select **Sign up**.



- Once signed up, you'll see **Registration Complete** and a prompt to sign into your account.

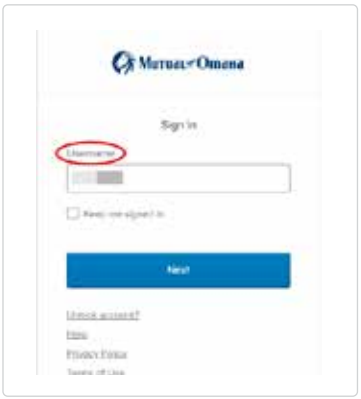


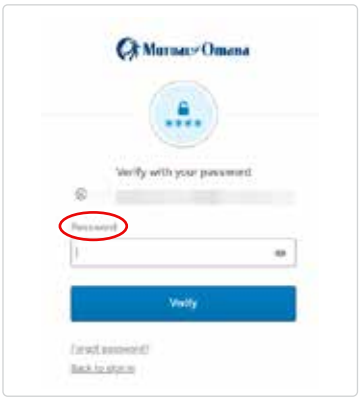
You're now registered for SPA and will need to register for Okta.

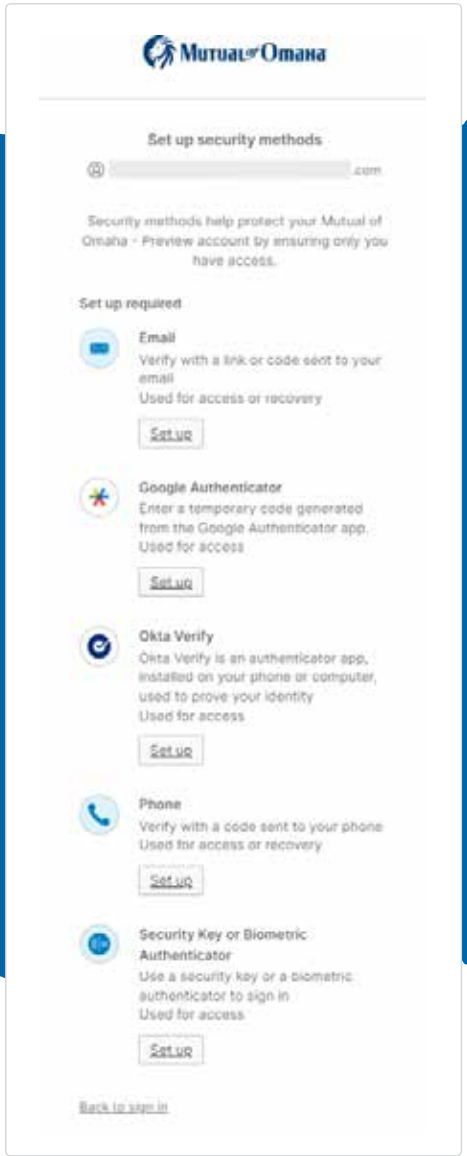
You'll be instructed to log in using the username or email address and password you've created.

Logging In to SPA When Okta Isn't Set Up

1. At the SPA login type in your SPA username on the first screen and password on the second screen, then click the **Verify** button.
2. After logging in, if you have not set up an Okta Multifactor Authentication (MFA), you'll be directed to the below screen.





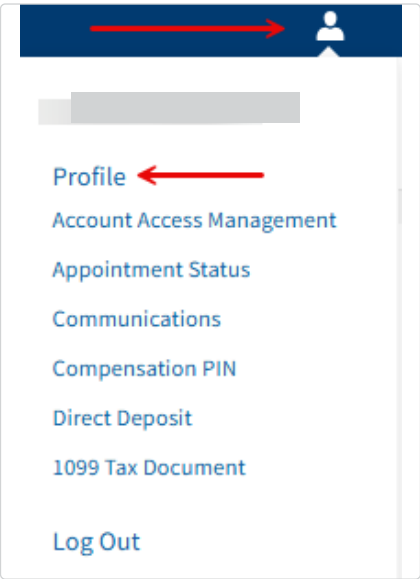


3. Click on **Set up** below the MFA you want and follow the setup prompts.
   - Okta MFA instructions
   - It's recommended that you set up more than one MFA
4. Click **Finish** and continue to SPA.

NOTE: Make sure you've verified your security email address on SPA before setting up an email authentication using the instructions on the next page.

How to Update Your SPA Email Address

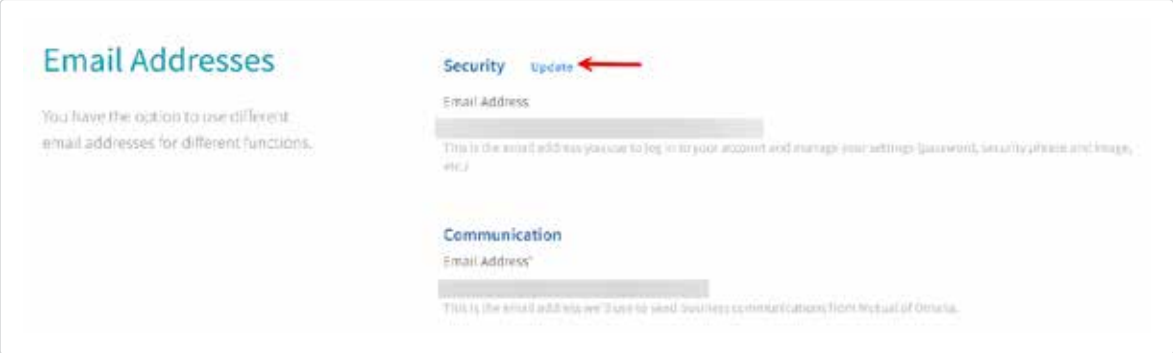
To authenticate using your email address, you must follow the following steps BEFORE you click the email authentication setup button. The email address you have listed on SPA is where the authentication email will be sent. There's no option to enter an email address for the authentication email to go to. Please follow the steps below prior to setting up email authentication.



Updating Your SPA Email Address:

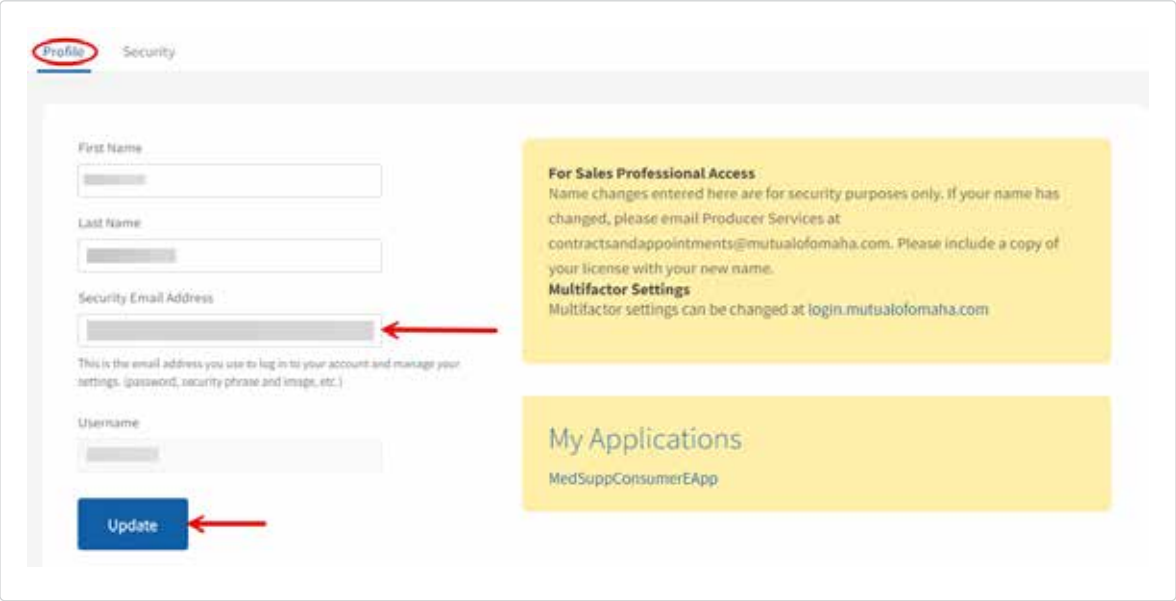
- Log on to SPA **(mutualofomaha.com/broker)**
- In upper right-hand corner, select image of the person
- Select **Profile**
- Review your information and update as needed
- After the change(s) are made, click **Update**

If you need to update your email address associated with SPA, you'll click the blue **Update** button (see below).

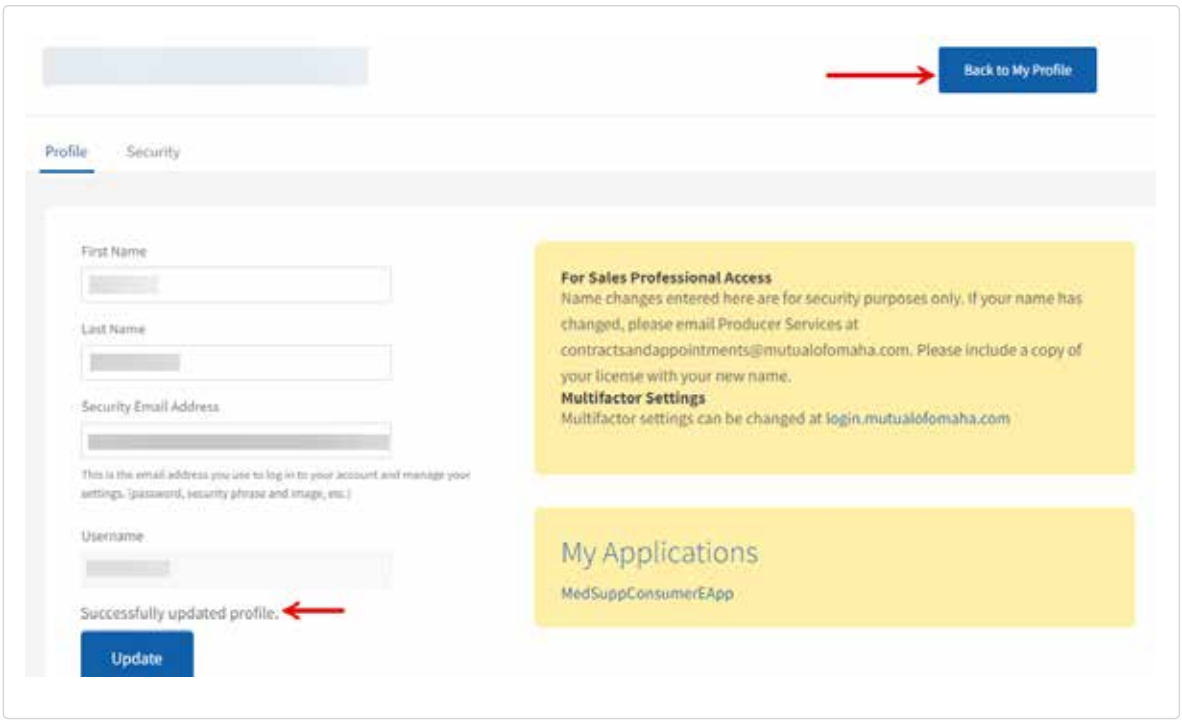


This is your email address that the email authentication will go to. **Please review for accuracy!** If you need to update your email information and have clicked the blue **Update** button, you'll be redirected to the **Profile Edit** screen (see image on following page).

Here you can edit your email address. When finished click the blue **Update** button.



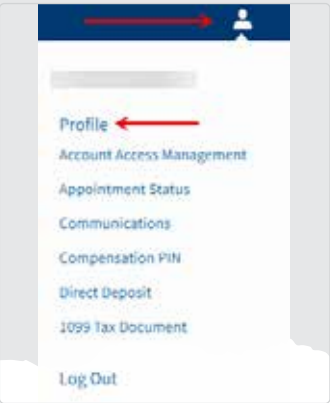
Once you've clicked the **Update** button, you'll see a note that says, **Successfully updated profile** located above the blue **Update** button. To go back to your profile, click the blue **Back to My Profile** button.



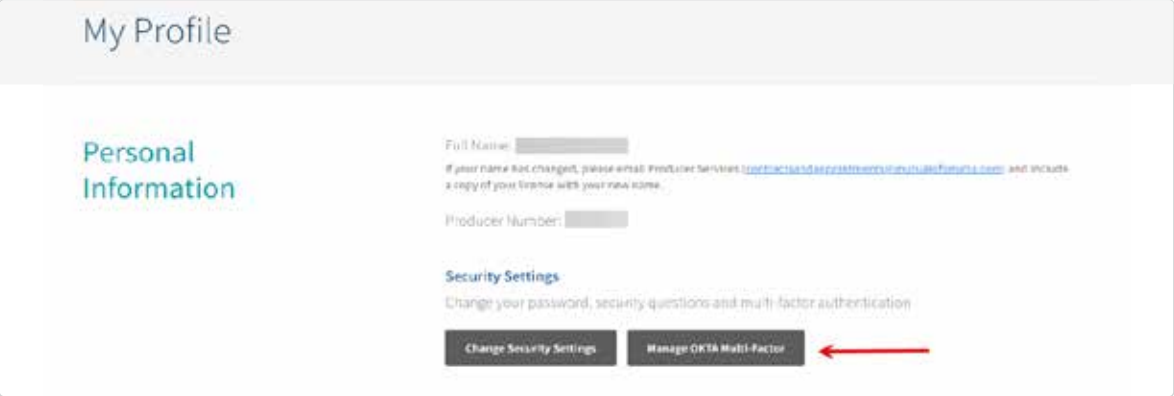
Once you've successfully set up authentication methods, you'll receive a confirmation email (to the SPA email address on file) regardless of the type of authentication setup you selected.

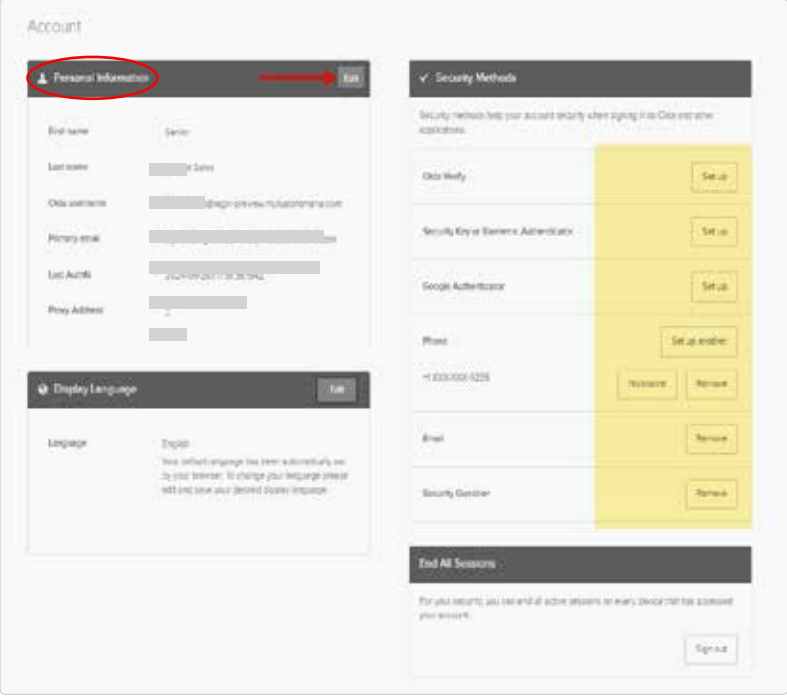
Managing Your Okta Multifactor Authorization Methods on Your Dashboard

Log into your SPA account as you normally would. On your SPA homepage, click the person in the top, right-hand corner. Then select **Profile** from the drop-down.



You'll then have the option to click the box **Manage Okta Multifactor** linking you to the Okta Dashboard, where you can edit and update your information, as well as manage your Okta MFA methods.





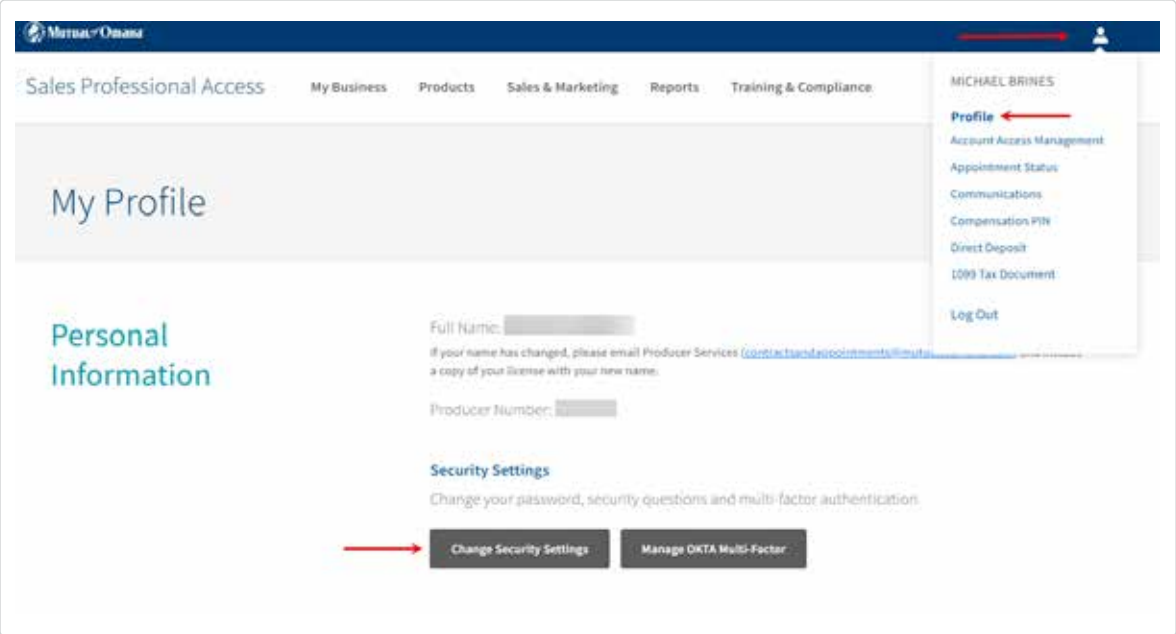
Once you've clicked the **Manage Okta Multifactor** button, you'll see the **Edit** option on the **Personal Information** box (left image). Here you can select the **Edit** button to update your profile, as well as set up or manage your MFA methods.

Identifying Your Username on SPA or Updating Your Password

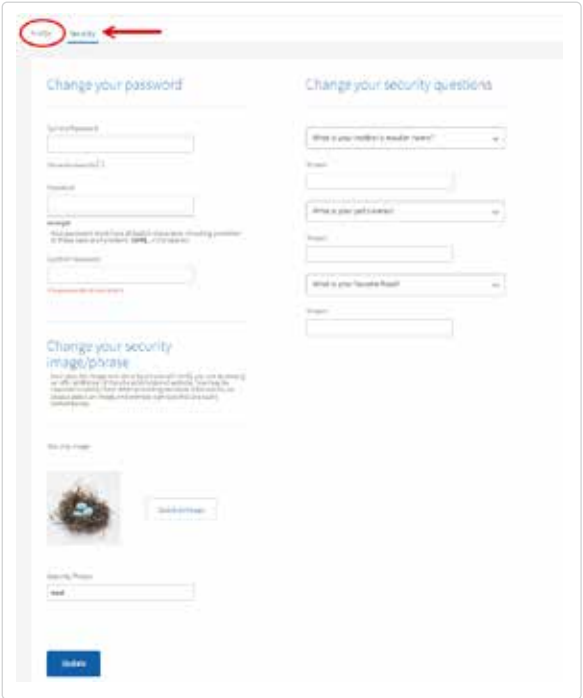
If you're unsure of what your SPA username is, it can be identified using the following steps:

1. Click the person image in the top right-hand corner of your screen, then select **Profile**.

2 . Once in the profile: On the **Personal Information** tab, you'll see your name, as well as a blue button that says **Change Security Settings**. Click this blue button to go to the **Security** portion of your profile.



3. This screen will show your profile and security settings. On the **Security** screen, you can change your password, security questions, email address and identify your username.



Your username, as well as your email address associated with your SPA account, can be found here under the **Profile** tab mentioned above.

How to Add an Authorized User on SPA (Optional)

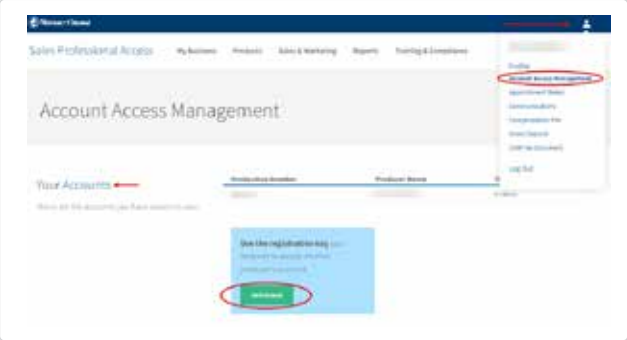
You'll need your SPA username, not your email address, to authenticate.

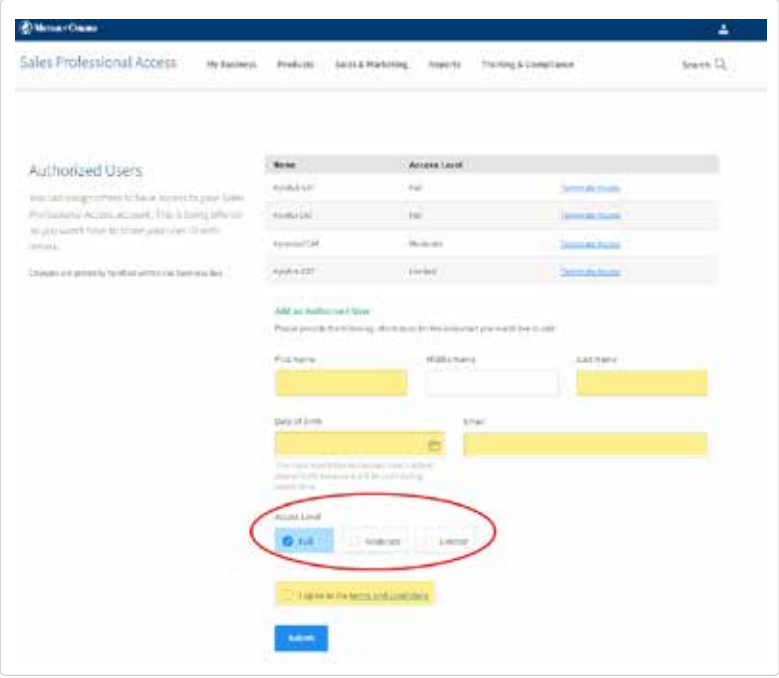
ALL users of SPA need to set up Okta, and you may also need to add authorized users to your SPA account.

- This information can be found next to the **Your Accounts** section.
- Each authorized user will have their own login credentials to SPA.
- **Okta is a two-factor authorization process. Login credentials cannot be shared.**

How to Add an Authorized User to SPA

- Login to SPA
- Select the profile image in the upper right-hand corner and select **Account Access Management** from the drop-down





On this page you can view your accounts, receive access to another producer's account (if applicable) as well as review, manage or add authorized users.

Determine the Access Level Each Authorized User Should Be Granted

You can select the level of access each authorized user has on SPA. The criteria for each level is below the **Add an Authorized User** section.

Note: SPA accounts with a compensation PIN will still require the PIN to view compensation reports and direct deposit information.

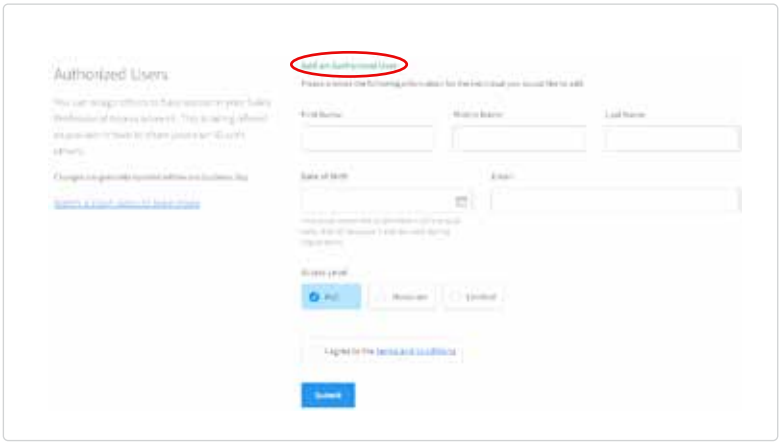
There are three security levels:

Agents can select which level of access they want their authorized users to have.

	Full Access	Moderate Access	Limited Access
Online Pay	✓		
Compensation Reports	✓		
Manager Comp Reports- If agent was manager and returned to personal production.	✓		
Non Pay Reports	✓	✓	✓
Persistency Report	✓		
Shrinkage Report	✓		
Direct Deposit Enrollment/Change	✓	✓	
Navigator	✓	✓	✓
Payment Management	✓	✓	
Market on Demand	✓	✓	✓
Website Creator	✓	✓	✓
Winflex Downloads	✓	✓	✓

How to Add an Authorized User to SPA

- For each user of SPA, add them as an authorized user by completing the required fields.



NOTE: The Date of Birth (DOB) must match the authorized user's actual DOB.

Next Steps for the Authorized User

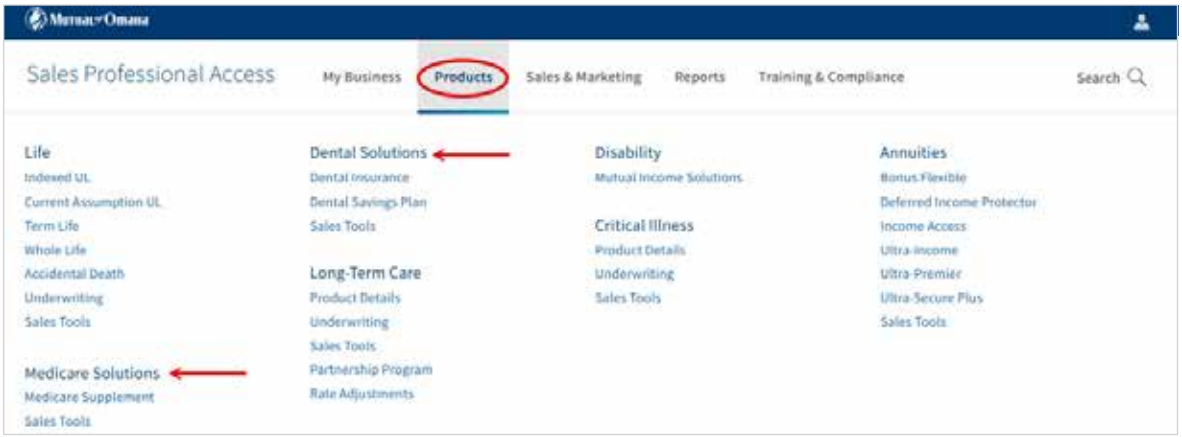
- Once you select **Submit** to add an authorized user, the authorized user will receive an email from Mutual of Omaha to complete the registration process.
- The authorized user should follow the instructions in the email to complete the registration process.

Questions?

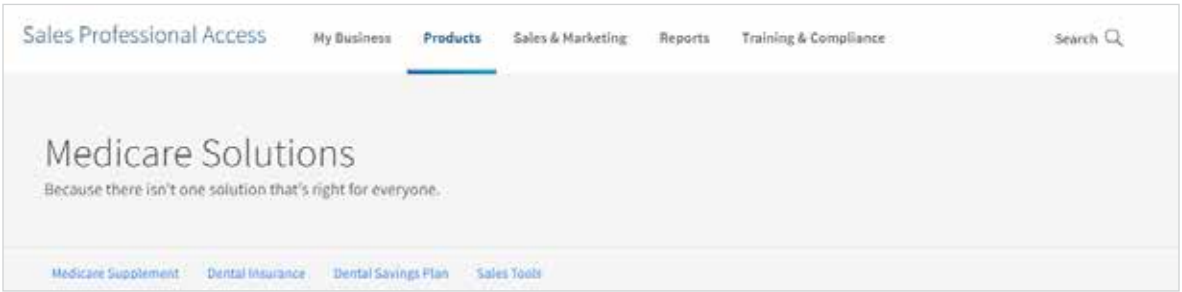
Please call our Field Assistance Center at
800-847-9785

Product Information

From the homepage, hover over the **Products** tab in the navigation bar and select **Medicare Solutions** from the drop-down menu.



Each tab has additional information on our Medicare solutions products.

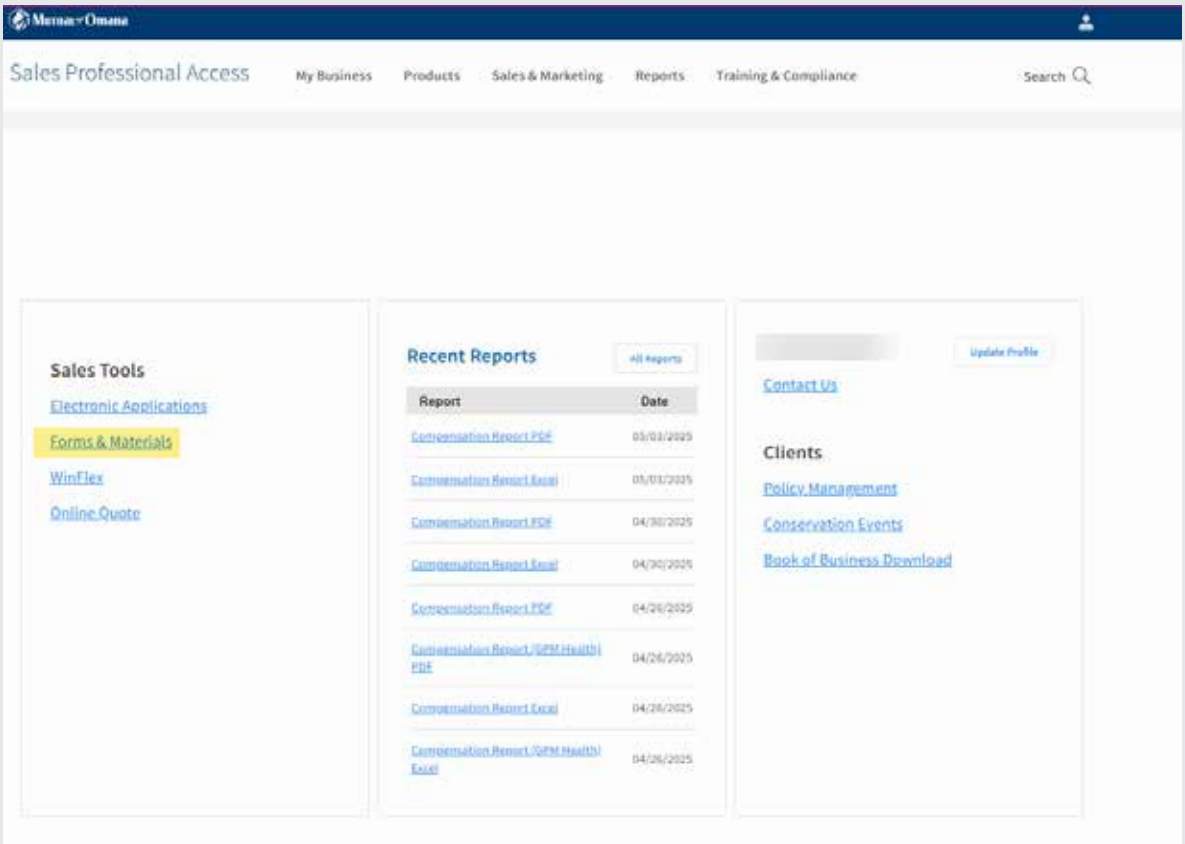


The **Sales Tools** tab helps you learn even more about our products and their competitive advantages, and provides access to our sales materials.

Forms and Materials

From the homepage, hover over the **Sales & Marketing** tab in the navigation bar and select **Forms & Materials** from the drop-down menu. This can also be accessed from your homepage.





For all basic searches, you must select one of the following:

1 Company

- Medicare Supplement — Mutual of Omaha and its affiliates
- Mutual of Omaha — Dental, Cancer & Heart Attack/Stroke Insurance

2 Service Type

- **New Business**
  Materials needed to submit business (app pack, outline of coverage)
- **Marketing**
  Materials used in sales process and prospecting (brochure, highlight sheet and postcards)
- **Policyholder Service**
  Materials needed post sale

3 State

Note: Quite a few forms are state specific.

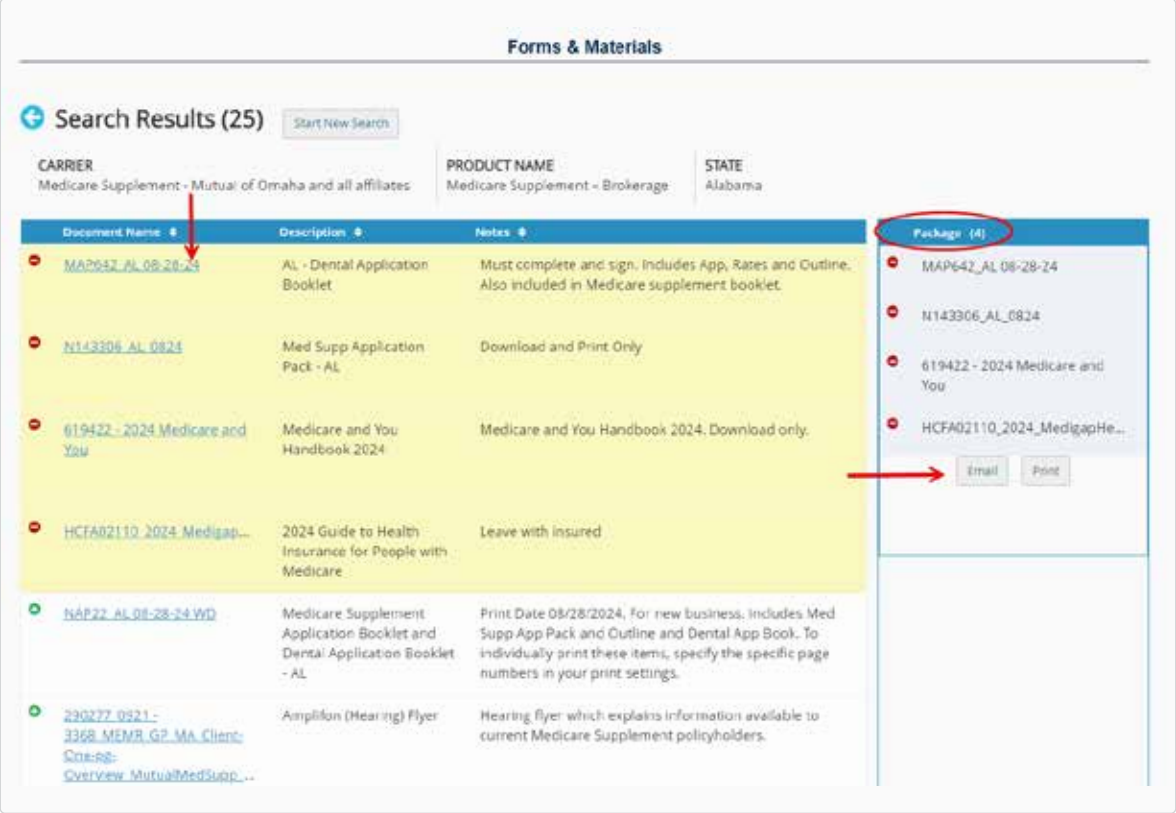
4 Product Type

- These will change based on the company you picked
  Note: All products will show even if you're not appointed to sell them.

5 Product Name

Search Results

A list of all approved materials, based on the filters you selected, will be displayed on the screen.



To view an item, click the form number listed under **Document Name**. You can save the documents to your computer, email or print them. Some forms can be filled out before saving or printing.

The forms highlighted in yellow are the forms selected in the Package drop-down. This will group forms together to be saved, emailed or printed.

Quoting

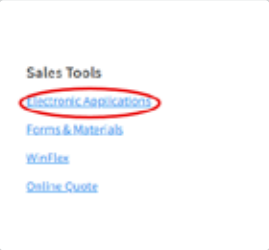
Install our Quotes for Sales Professionals mobile quoting app to your device to provide Med supp and dental insurance rate quotes on the go.

1. Go to your app store.
2. Search for **Mutual of Omaha Quotes for Sales Professionals.**
3. Install and start quoting!

GET IT ON Google Play | Download on the App Store

e-Apps

You can get to the Medicare supplement and dental e-Apps from either the SPA homepage or the **Sales & Marketing** tab.



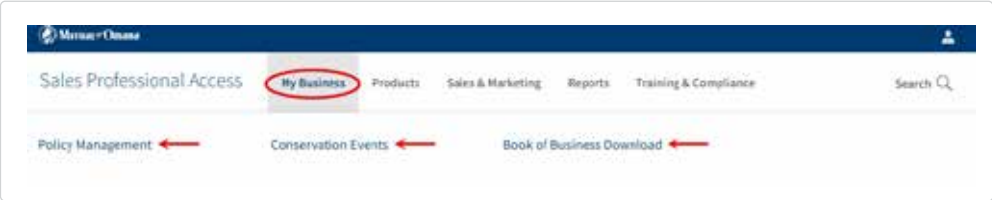


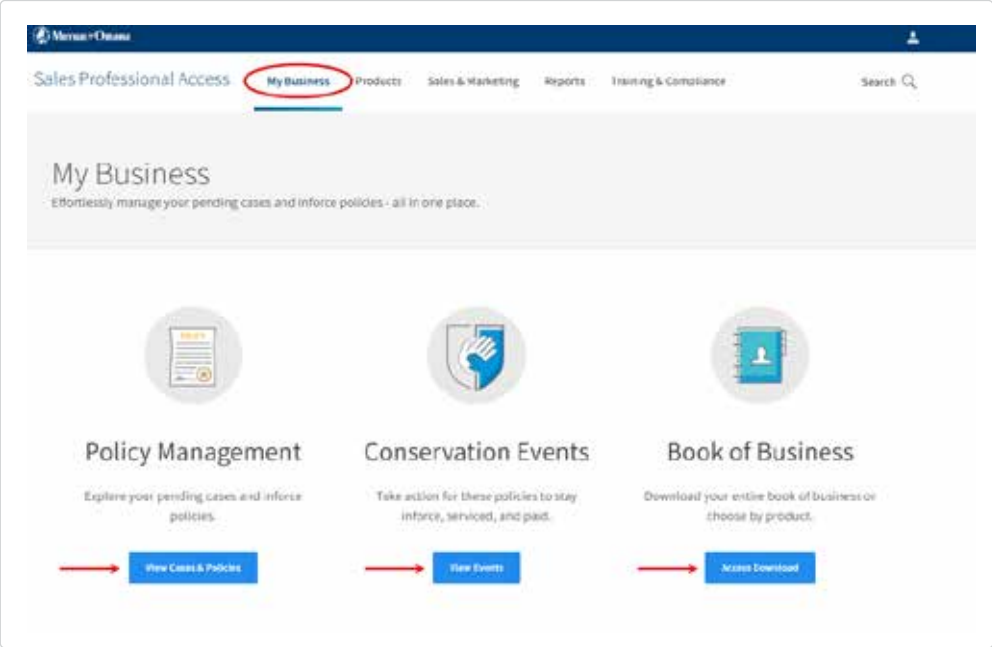
Choose the product you want from the menu on the left-hand side. When you're ready to start an e-App, select **Start e-App**. you'll also find resources, user guides and a video for e-Apps.

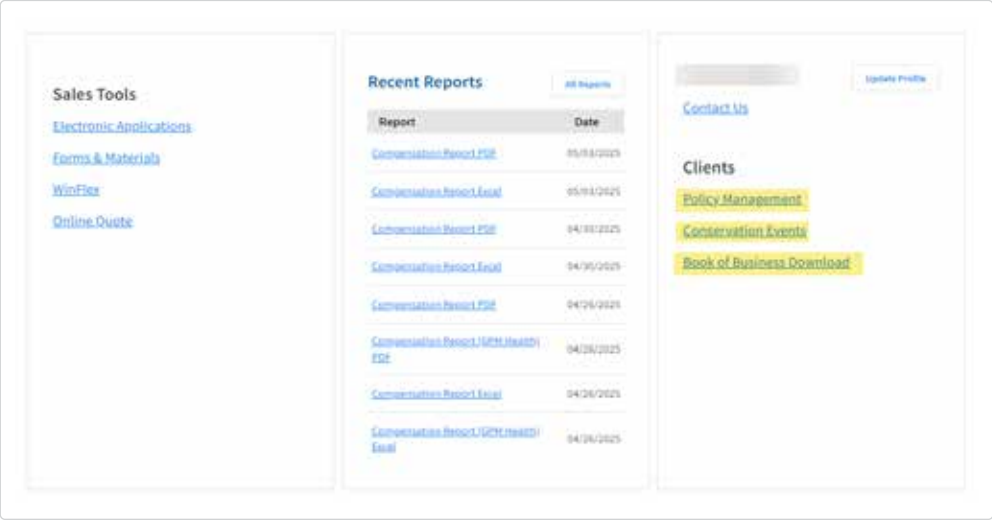
Reporting

From the **My Business** tab, there are three options to view your business. These links will take you to the three different reports. By clicking on each link, you'll be taken to the specific page.

Note: You can access your business from your homepage, too.





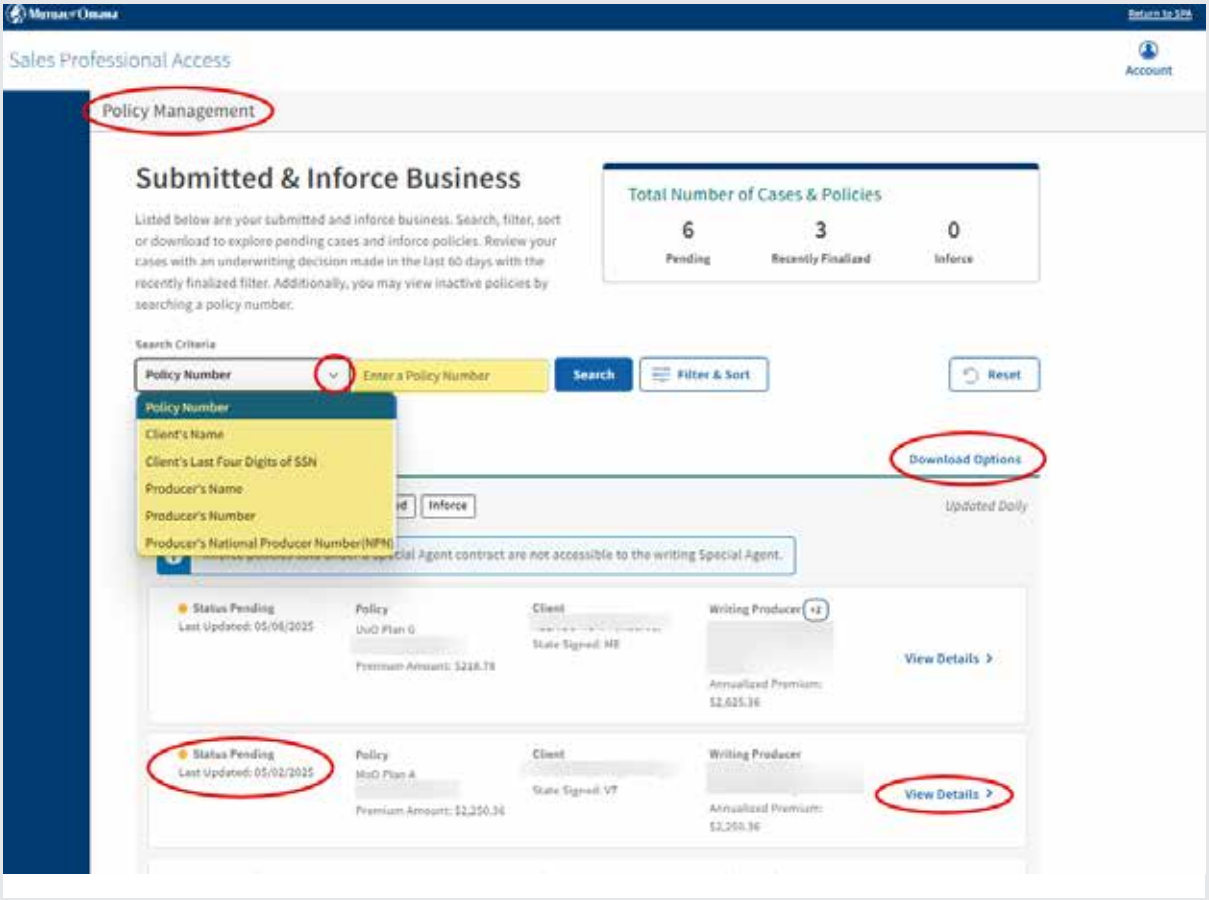


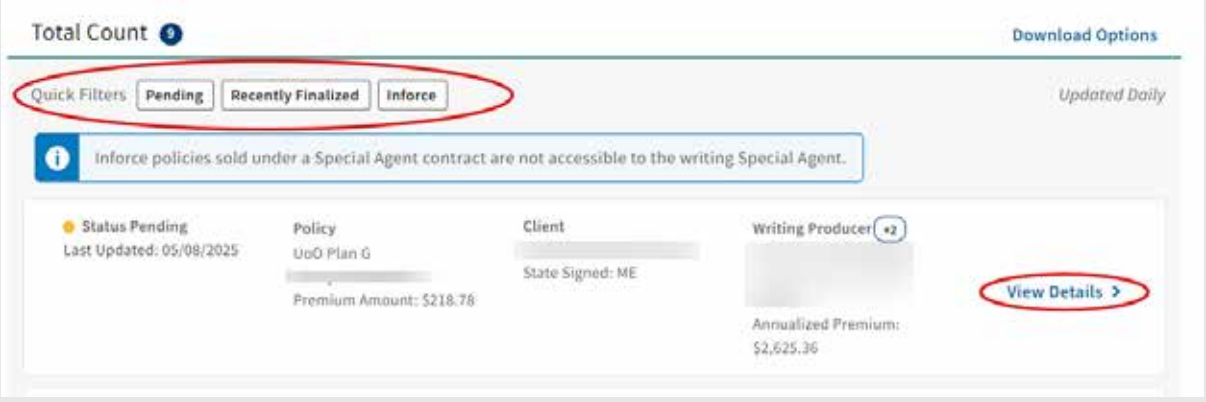
Policy Management Tool

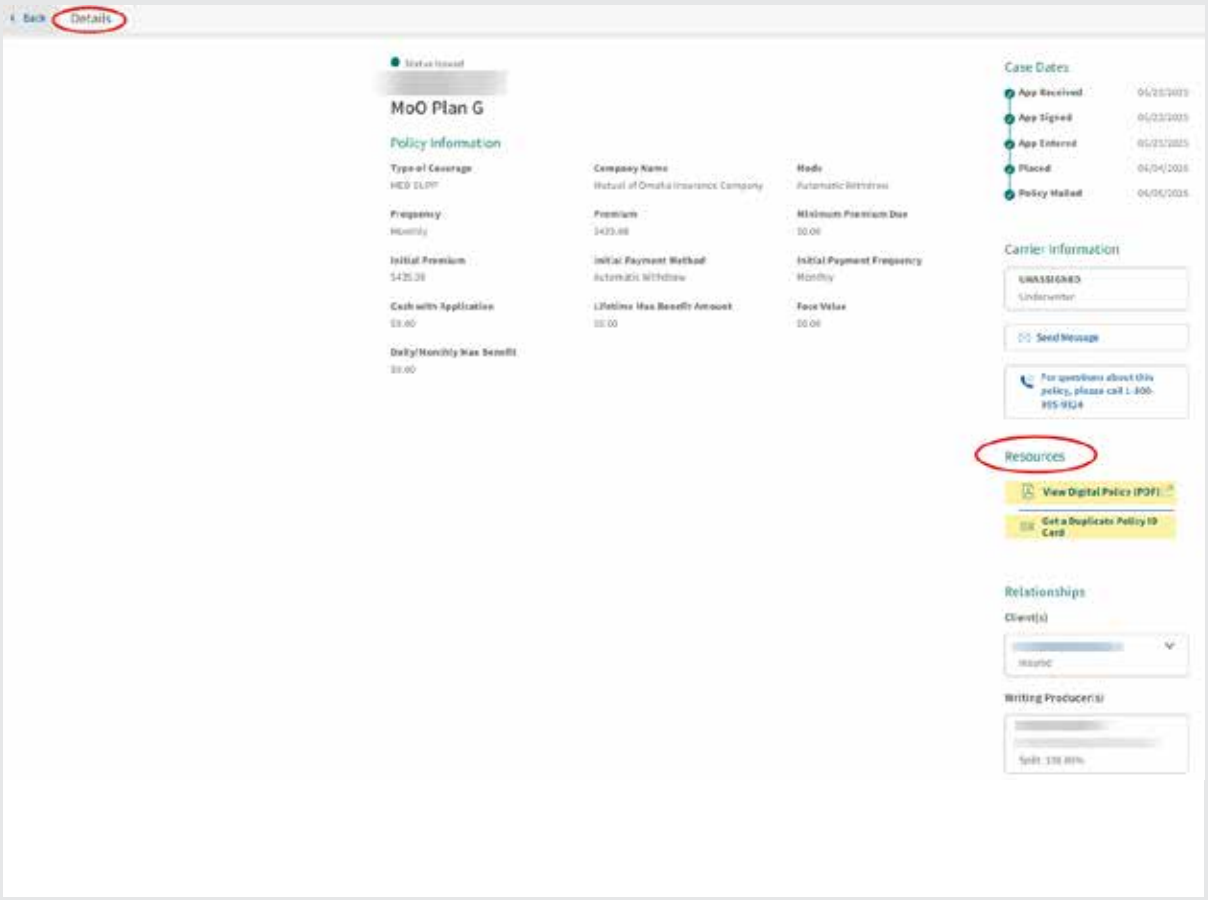
This tool allows you to view submitted and in-force business. To search for a policy, use the **Search Criteria** drop-down, enter a policy number or use the **Quick Filters** to quickly sort through your policies. By clicking the **View Details** link, you can see more information about the specific policy. You also have the option to download the policies by selecting the **Download Options** link.

Note: The same options are listed on the Book of Business page.

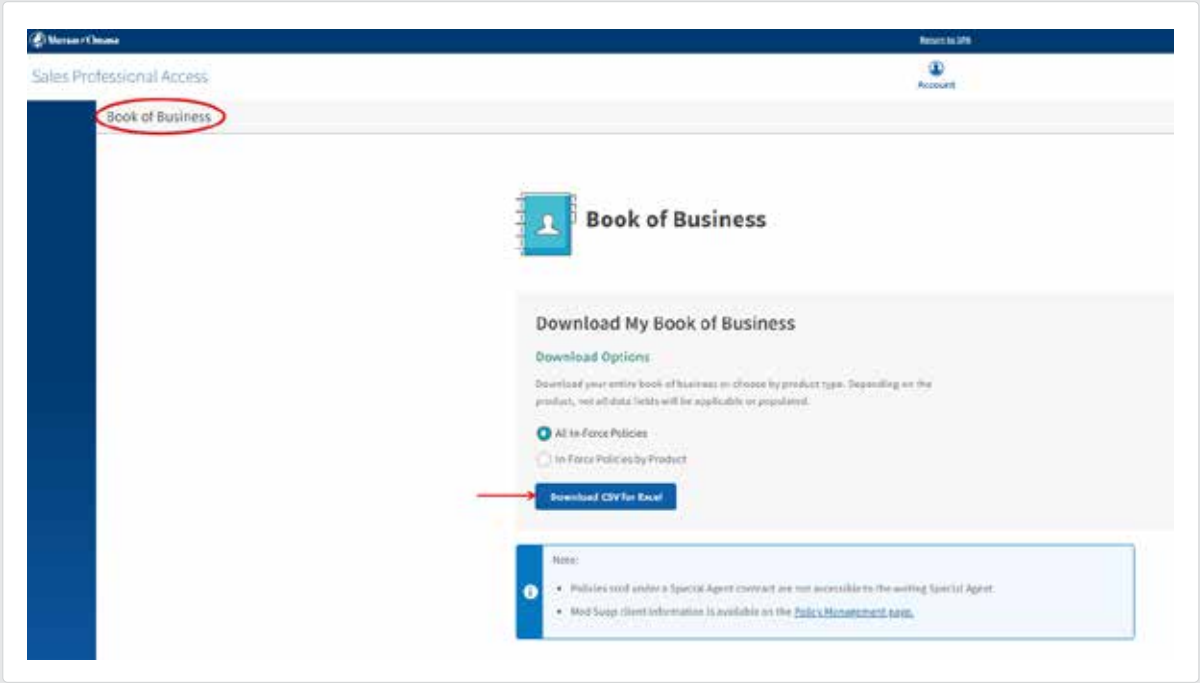
If the policy is already in force, you have the options to get a duplicate policy ID card or view the digital policy located under the **Resources** header.



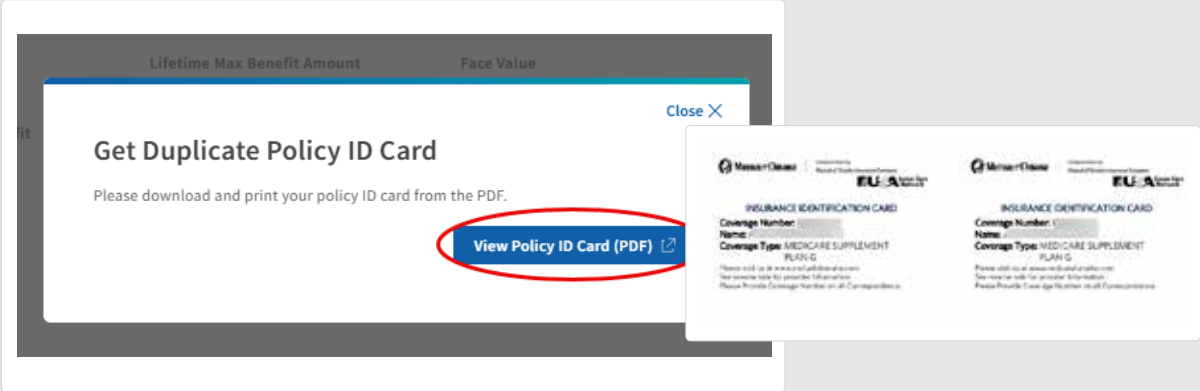



Back
Details
MoO Plan G
Policy Information
Type of Coverage
Company Name
Mode
Frequency
Premium
Minimum Premium Due
Initial Premium
Initial Payment Method
Initial Payment Frequency
Cash with Application
Lifetime Max Benefit Amount
Face Value
Daily/Monthly Max Benefit
Case Dates
App Received
App Signed
App Entered
Placed
Policy Mailed
Carrier Information
Send Message
Resources
View Digital Policy (PDF)
Get a Duplicate Policy ID Card
Relationships
Client(s)
Writing Producer(s)

Book of Business Download — Get in-force policy information by downloading your Mutual of Omaha policies you've sold using the Book of Business download. Select the type of policy you're looking for and follow the prompts to receive an Excel file to download with the policy information selected.

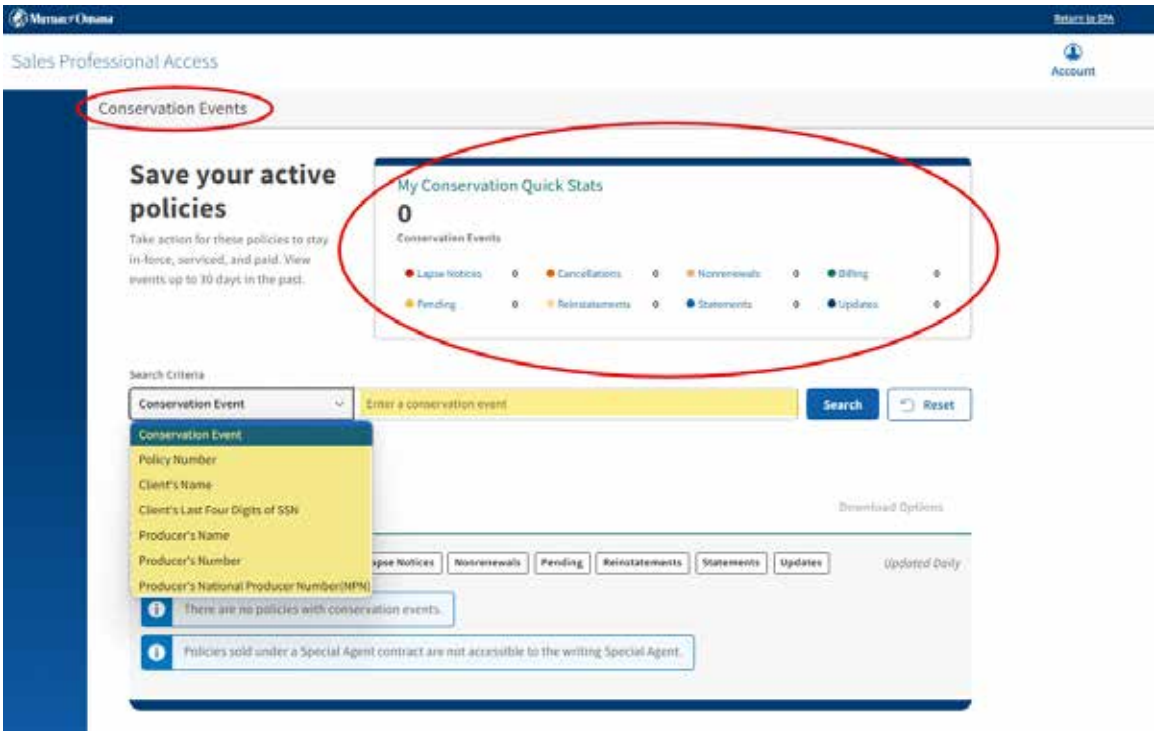


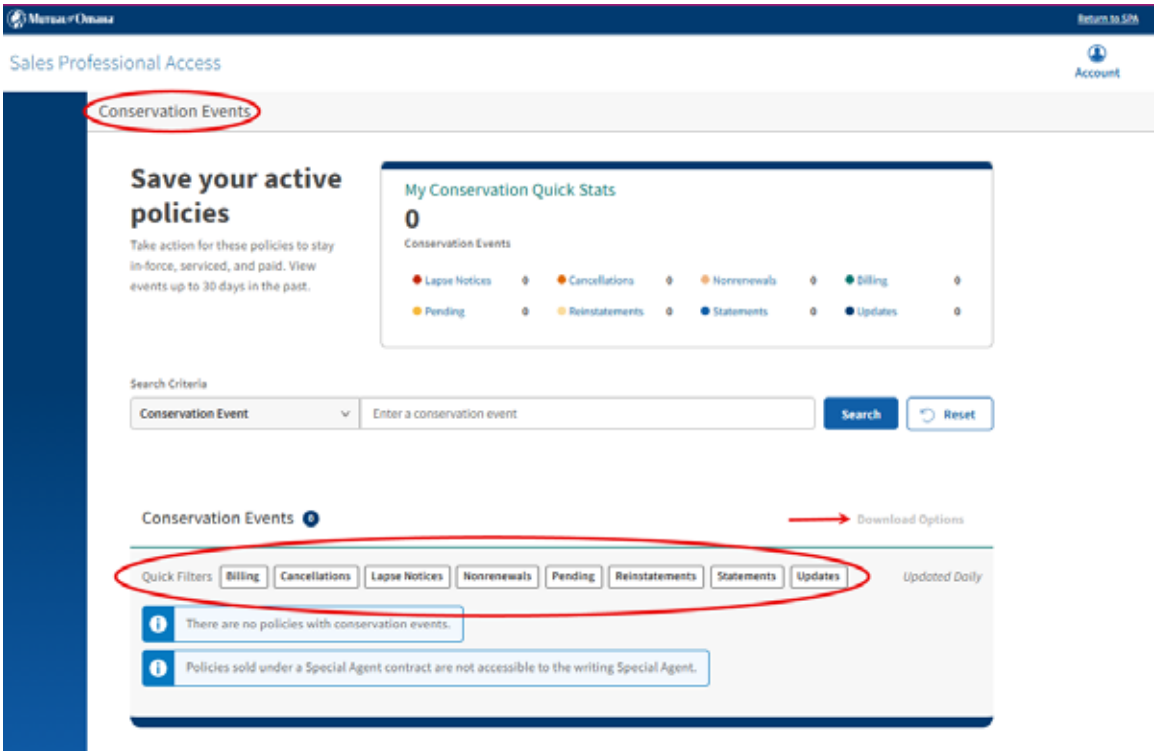
Under the **View Digital Policy PDF** link, you'll see a link that says **Get a Duplicate Policy ID Card**. Click that link to download, print or email a duplicate PDF version of your policyholder's Medicare supplement policy ID card.



Conservation Events — Easily manage your active policies and download 30 days of conservation event data. You can easily search for specific policies by using the **Search Criteria** drop-down or the **Quick Filters** to locate policies. Download the information you want by selecting the **Download Options** link.

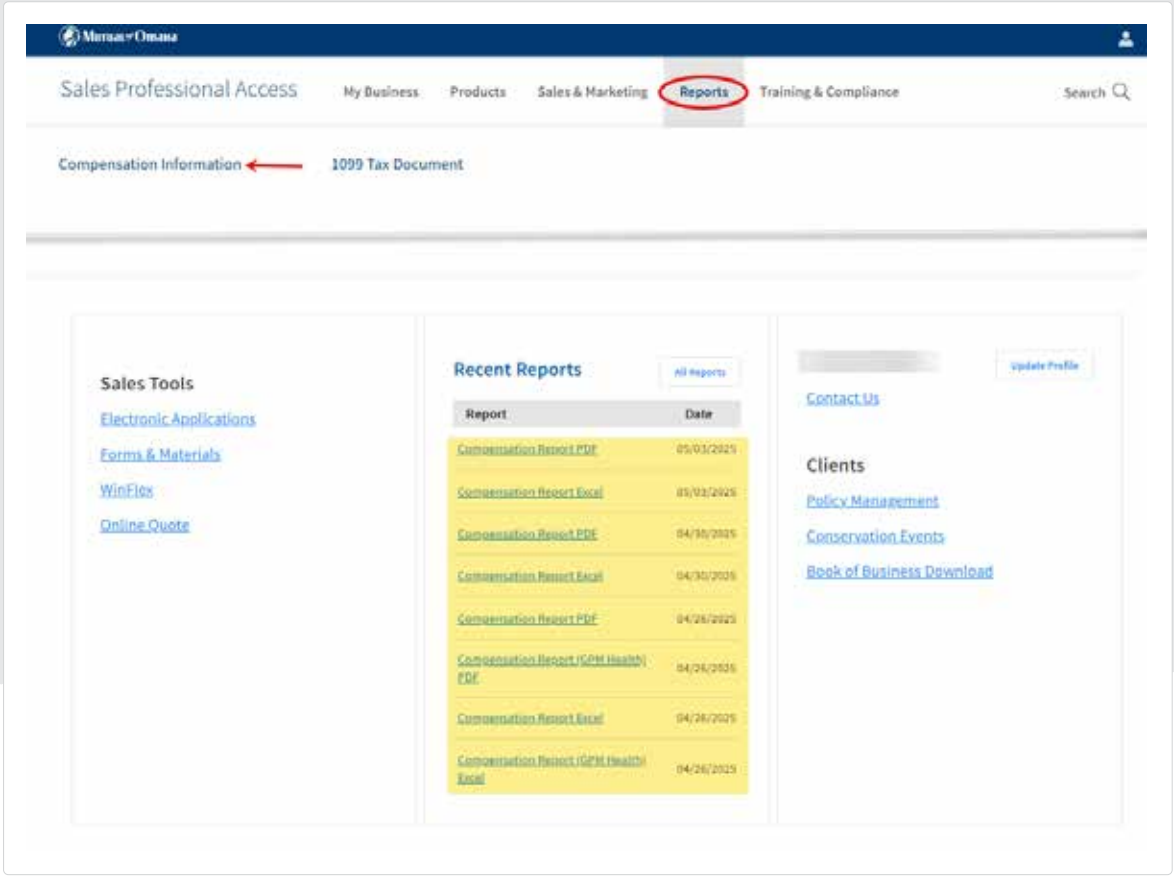
Note: The same options are listed on the Book of Business page.





Compensation Information

To find detailed commission statements, select the **Reports** tab. On the **Reports** page, scroll down to the **Compensation Information** section to see your latest compensation statements. You can also find your compensation information under the **Recent Reports** portion of your SPA homepage (in the center of the page).



MEDICARE SOLUTIONS CONTACTS

Medicare Supplement | Dental

General Contact Information for All Products

Area	Phone Number	Email
Compensation Support	800-475-4465	broker.compensation@mutualofomaha.com
Contracts, Licensing & Producer Services	800-867-6873	contractsandappointments@mutualofomaha.com
Sales Support	800-693-6083	sales.support@mutualofomaha.com
Tech Support	800-847-9785	producertechsupport@mutualofomaha.com
Senior Health Sales Team		seniorhealthsales@mutualofomaha.com

Medicare Supplement

Area	Phone Number
Policyholder Customer Service mycustomerservicehealth@mutualofomaha.com	800-775-6000
Underwriting	800-995-9324

Dental

Area	Phone Number
Underwriting	855-845-1849
Dental pretreatment estimate	855-218-1466
Nominate a dentist to the network (for provider use only)	855-218-1466
Vision expenses reimbursement (vision claims option)	800-775-1000

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Application Submissions

App Type	Med Supp, Dental
e-Apps	MutualofOmaha.com/broker Select the Electronic Applications link on the home page or on the Sales & Marketing tab.
Paper Apps Order application books through normal channels.	**Mail — Normal Delivery** Mutual of Omaha P.O. Box 3608 Omaha, NE 68103 **Mail — Overnight Delivery** Mutual of Omaha 3300 Mutual of Omaha Plaza Omaha, NE 68175 **Fax to 866-799-9076** When initial premiums are paid through Automated Clearing House (ACH) **Email Med supp applications** capture.medsuppappimport@mutualofomaha.com Subject line: New App **Email Dental applications** capture.indNBHealthimport@mutualofomaha.com Subject line: New App
Additional Requirements	Send additional requirements to healthrequirements@mutualofomaha.com with the case number in the subject line

Mobile Quote App — Med Supp and Dental

Download to your smartphone and tablet. Search Quotes for Sales Professionals in the Apple Store or Google Play.

Producer Website

Sales Professional Access | MutualofOmaha.com/broker

To create your account, click Sign Up and follow the instructions. You need your seven-digit Mutual of Omaha production number to register.

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