



**CROWN**  
ADMINISTRATORS

# **IMR Portal Instructions**

## **Instructions for use**

4/12/2019

Rev1.8

The following pages will detail for you the features and functions available to certified Independent Member Representatives on the Altruia HealthShare IMR Portal.

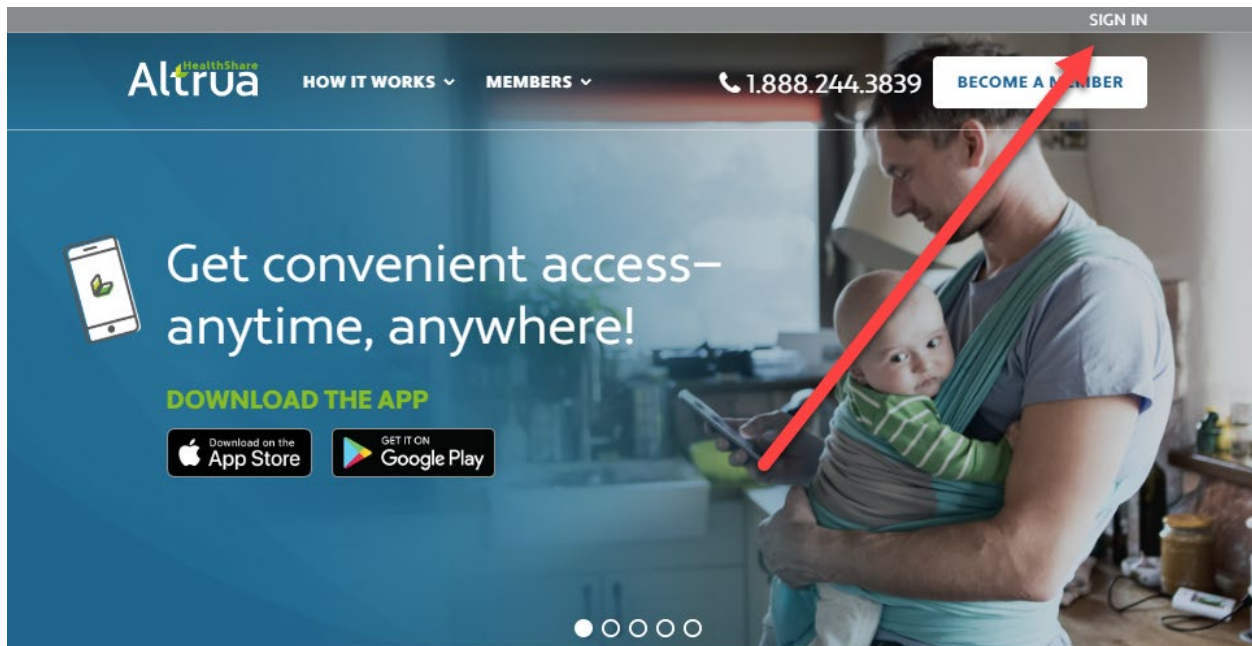
These features are only available after and IMR has completed their certification test.

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Logging in.

To login to the portal use Google Chrome as your internet browser and enter the following URL <https://altruahealthshare.org/> While other browsers will work the experience is optimized for the Google Chrome browser. Once the page loads you will need to click on the “SIGN IN” link located in the upper right-hand corner of the home page:



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 ↔  ↔

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**Find out how much your family could save—NO OBLIGATION!**

First Name\*

Last Name\*

Email\*

Phone\*

[SUBMIT](#)

[Live Chat](#)

This will take you to the login screen below

## Sign In

If you are already a member please enter your username and password below to login to your Portal. Your username is typically the email address used to create your account. If you are not a member please click register below to fill out an application.



[Forgot Password?](#)

To ensure a smooth enrollment experience please use Firefox or Chrome browsers.

Register

Sign In

If you are having login difficulties please call us at 888-244-3839 M-F 8 AM – 6 PM CST.

Your username and password will be provided by Crown Administrators Business Development team once they receive confirmation of your successful completion of the certification test. Simply enter the information above and click on the “Sign In” link.

## Portal Features

You will then be authenticated to access the portal features:

1. Start an Application – Allows you to begin an enrollment for a potential member of an Altrua HealthShare plan
2. Dashboard – displays your downstream members and their application status
  - a. Initiated – An enrollment application has been started but NOT completed by the member
  - b. Active – All Active enrollments
  - c. Submitted – All Cancelled, pending cancellation or on hold members
3. Group Dashboard – allows you to see any group’s that you have enrolled and their member status
4. Create Group – Allows you to create a new group for enrollment

5. Super-Agent Dashboard – Reserved for FMO, GA of IMR's with downstream IMR's and their book of business
6. My Profile – Allows you to update your name, address, email and phone number
7. Membership Plan Offerings – Allows you to see the plans you are certified to offer and their detail services
8. Quick Quote – Allows you to see the cost of the plans based on the Head of Household age and number of family members, a quick way to get a quote.
9. Member Report – Allows you to get an excel copy of your current book of business
10. Transaction Report – Allows you to get an excel report of your current book of businesses last transaction amount and status
11. Login to Life works – if you are on an Altrua HealthShare plan this link will log you into the Lifeworks system
12. Membership Guidelines – A link to the current and historical Membership Guidelines for Altrua HealthShare plans
13. IRS Form 8965 – Link to the IRS PDF for submitting Health Coverage Exemptions to the IRS
14. Height/Weight Chart – A link to the additional costs for members to enroll if they exceed certain height or weight restrictions
15. AHS billing Information – A link to a PDF form to update a members billing information, they can also do this in their own portal for faster and more convenient access.
16. Maternity Forms – A link to forms needed when a Member is starting the maternity process to ensure they receive the services they need.
17. Membership Commitment Form – A link to the form required for members to sign to be an active member of an Altrua HealthShare plan
18. Membership Update Form – A link to the PDF to update information about a member, can also be done in the members portal for faster and more convenient access.
19. Invite Members – A quick way to email your unique enrollment link to one or more recipients so that you receive credit when they enroll.
20. Copy Link – A quick way to copy your unique enrollment link so that you can paste it into an email or other document so that you receive credit when they enroll.
21. Late Contributions – Any member that has not sent in a contribution for the previous month will show up here, these are members whose medical needs will not be shared in until they catch up. After 60 days these members will be cancelled.
22. Memberships
  - a. Started – An enrollment application has been started but NOT completed by the member
  - b. Active – All Active enrollments
  - c. Cancelled – All Cancelled, pending cancellation or on hold members
23. Search – here you can search for any member by partial name

Hi, [redacted]

For help please call us at:  
512-535-4237 or email  
repservices@crownadmin.com

Signed in As [redacted] [Sign Out](#)

[Start an Application](#)

You have 0 Active and 1 Started and 0 Cancelled memberships.

### Late Contributions 21

Show  entries

Head of Household	Submitted Date	Effective Date	Monthly Contribution	Plan	Member Id	Membership Status	Days Outstanding
No data available in table							

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### Memberships 22

Started	Active	Cancelled
---------	--------	-----------

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | All

Show  entries

23 Search:

Head of Household	Submitted Date	Effective Date	Monthly Contribution	Plan	Member Id	Membership Status
> john doe		2018-01-01	\$0			Pending

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## Sample Member Report

When you click on the “Member Report” link in the portal a spreadsheet file will be downloaded to your computer. When you open the spreadsheet a list of all the members you have ever enrolled or attempted to enroll will be provided with the following data.

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R
Agent #	Agent Name	Member Enrolled #	Member Enrolled Name	Email	State	Membership Status	Enrolled Date	Effective Date	Plan Type	# of Dependents	Days Outstanding	Contribution Amount	Payment Method	Last Transaction Date	Last Transaction Status	Membership End Date	Reason For Cancellation
88888		111	john doe	rjdoe@aol.com	GA	Pending		2018-01-01		1		\$0					

- Agent# - The Agent # in the Altrua HealthShare system who enrolled the member
- Agent Name – Your name or the name of the agent who enrolled the member
- Member Enrolled # - The Member enrollment number
- Member Enrolled Name – Name of the enrolled member
- Email – Email address of the member
- State – State the member lives in
- Membership Status – Status of the membership (Active, Cancelled, Pending means the enrollment app is not complete)
- Enrolled Date – Date of the enrollment
- Effective Date – Date their membership becomes effective and we will share in their medical needs
- Plan Type – which plan they are enrolled in
- # of Dependents – Number of dependents on their plan
- Days Outstanding – number of days their contribution is late (negative means they are more than 30 days late and their medical needs will not be shared in)
- Contribution Amount – Amount of their monthly contribution
- Payment Method – how the member chose to pay their contribution
- Last Transaction Date- the last date we received a contribution
- Last Transaction Status – status of the contribution (if failed it means it did not go through)
- Membership End Date – the last date the member was actively on a plan
- Reason Force Cancellation – why the member chose to cancel their membership

## Completing an Application:

Any entry under the “initiated” tab has not completed their application. You can assist the member by clicking on the “Complete Application” link:

**Memberships**

Initiated Active Submitted

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | All

Show 10 entries Search:

Head of Household	Submitted Date	Effective Date	Monthly Contribution	Plan	Member Id	Membership Status
John doe		2018-01-01	\$0			Pending

Effective Date  
Jan 1, 2018

Household  
Member

Email Address  
rebecca@aol.com

Phone Number  
3174093715

Plan

Mailing Address  
111 snoblesvilleGAUSA98457

Complete Application

Previous 1 Next

## Printing a Temporary Membership Card for a member

From inside the IMR portal click the green arrow next to the member name and you will see their detail along with a link to print the application and a “temporary Membership card”

**Memberships**

Initiated Active Submitted

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | All

Show 10 entries Search:

Head of Household	Submitted Date	Effective Date	Monthly Contribution	Plan	Member Id	Membership Status
	2018-08-29	2018-10-01	\$444	Gold 2019		Active

Effective Date  
Oct 1, 2018

Household  
Member+1

Email Address

Phone Number

Plan  
Gold 2019

Mailing Address

Dependents  
Children

Limitations

Temporary Membership Card

Download Application

If you scroll down further you will see any limitation the member has:

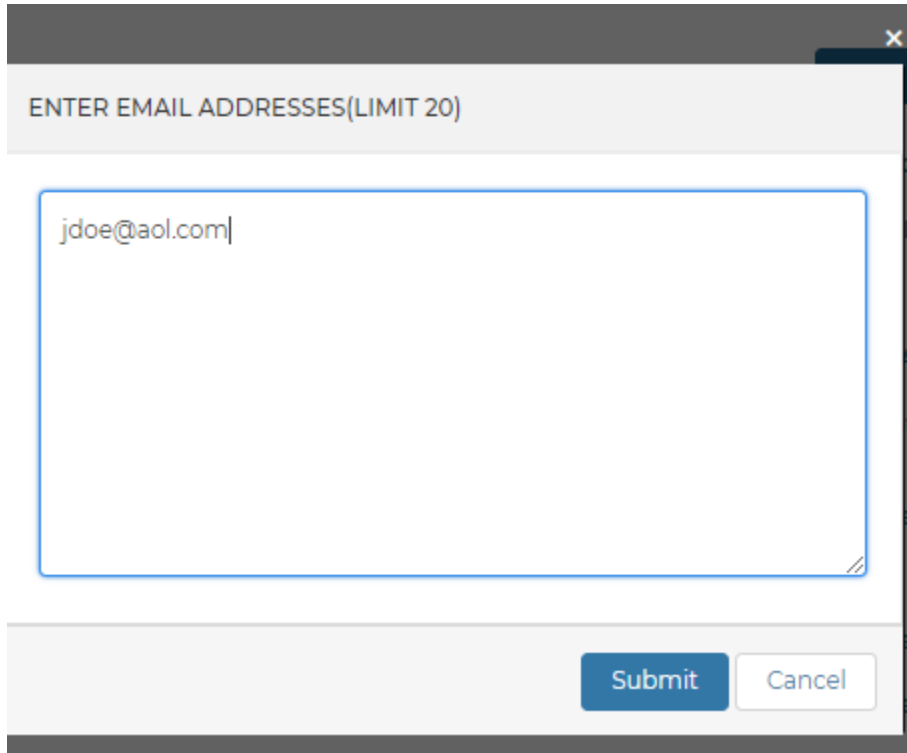
Head of Household	Submitted Date	Effective Date	Monthly Contribution	Plan	Member Id	Membership Status
	2018-08-29	2018-10-01	\$444	Gold 2019		Active

**Limitations**  
Breast, cervical, endometrial and ovarian cancer related needs will be eligible for sharing after 1 year, if clean test results were received by Altrua HealthShare within 30 days of the effective date, or 1 year from the date that Altrua HealthShare receives and approves clean test results. A membership limitation on cancer will supersede this



## Emailing your enrollment link directly:

You can send an email directly to a prospect member by clicking on the “Invite Members” Link, you simply enter their email address and click “Submit”

A screenshot of a web form titled "ENTER EMAIL ADDRESSES(LIMIT 20)". The form has a large text input area with a blue border. Inside the input area, the email address "jdoe@aol.com" is entered. Below the input area, there are two buttons: a blue "Submit" button and a white "Cancel" button with a blue border. The form is set against a light gray background with a dark gray header and footer.

An email from your email address will be sent with the following link

Thank you for considering Altrua HealthShare. Please click the link below to complete your Membership Enrollment Application.

<https://myaccount.altruahealthshare.org/AltruaRegistration?ContactId=0033600001Le3SyAAJ&useremail=jon@vcio.com>

Altrua HealthShare.