Altrua HealthShare

Tips to Help you Understand your Agent Portal.

Late Contributions

Shows member contributions that have not been paid on time. Reach out to your clients.

Memberships

Started	Active	On Hold	Cancelled

Started Tab

Shows your started, pending, or enrolled applications

Active Tab

Shows your active cases

On Hold Tab

Shows your cases on accounting hold or eligibility hold

(most likely due to non- payment or commitment forms not received)

Cancelled Tab

Shows your inactive, lapsed and cancelled cases

Start an Application

Click here to start a new application

Organization Dashboard and Create Organization

Both of these tabs are for creating a group

My Profile

This is your personal information. Keep it updated.

Membership Plan Offerings

This shows all the offered plans available

Quick Quote

This is the quickest way to quote a client

Member Report

This shows your members and their info

Transaction Report

This shows member payments

Invite Members

Email your clients to submit their own application

Copy Link

Best way to invite member to apply themselves