C.I.S.A. Agent Portal Login Instructions

To log in to C.I.S.A agent portal please click on the link below.

https://cisadata.com/Cisa/login.aspx

   a. Your username will be the email you provided C.I.S.A. when you signed your contract with our agency.
   b. The password will be your first name with the first letter of your last name capitalized, the first initial of your last name, along with the last four digits of your social security number. For example if your name is John Doe and the last four of your social security number is 1234, your password is Johnd1234.
   c. Once you have the required login information proceed to login to the agent portal.
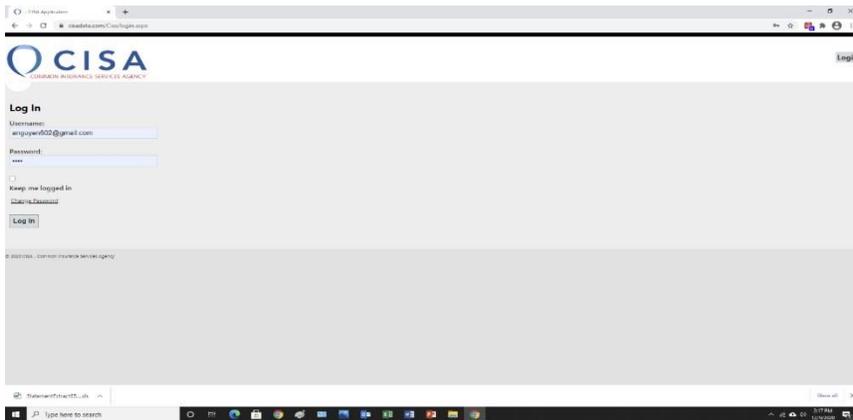

   1. Once you have entered your login information and have successfully logged in, you will be at the 'find patient' dashboard.
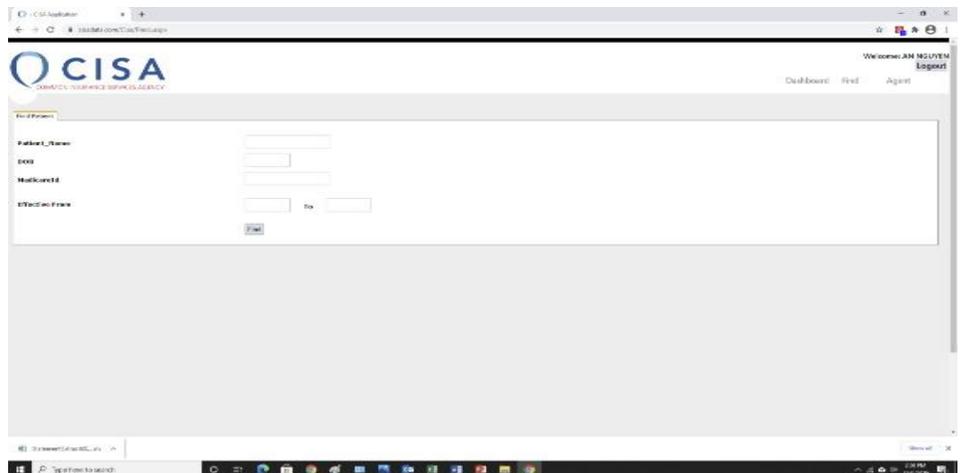
2. You will be able to search through your book of business (all the applications you have submitted through C.I.S.A.), using the C.I.S.A. agent portal. Additionally, all applications that have been submitted with an effective date of 01/01/2021 or later will be downloadable utilizing the C.I.S.A. agent portal.

   a. You can search through your book of business by entering your clients first and last name.
   b. You will be also be able to bring your clients' information by entering their Medicare Beneficiary Identification (MBI) number.
   c. Additionally, you can search via your client's date of birth or the effective date of the policy.

   **Uploading Documents Securely using C.I.S.A. Agent Portal**

3. To upload a document or application utilizing the agent portal please the agent tab click on the top right corner of your dashboard.
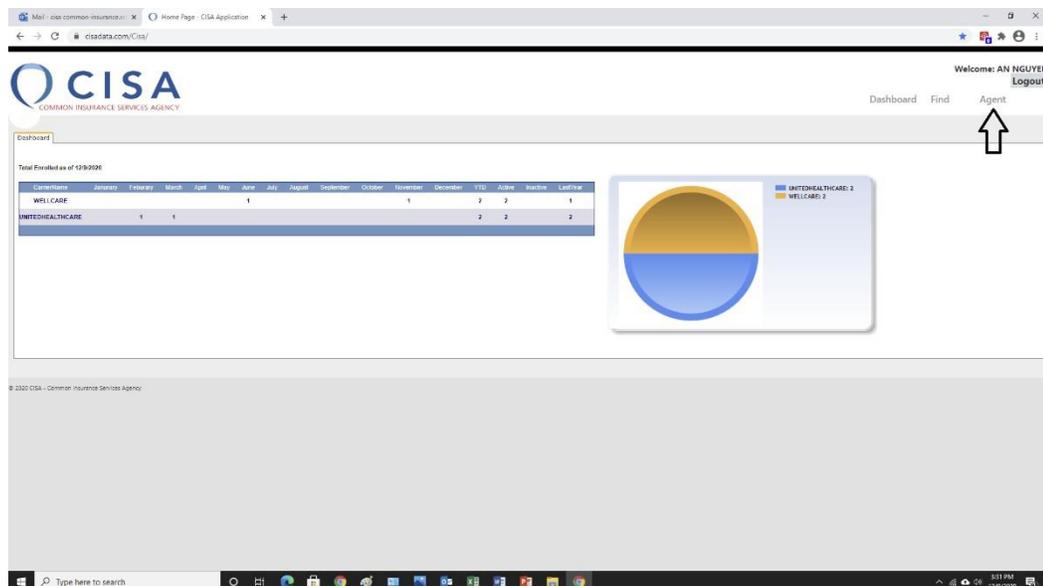
4. Click on the agent tab and you will be brought to the agent dashboard.
   a. Click the documents tab underneath located underneath agent details on the right of the page.
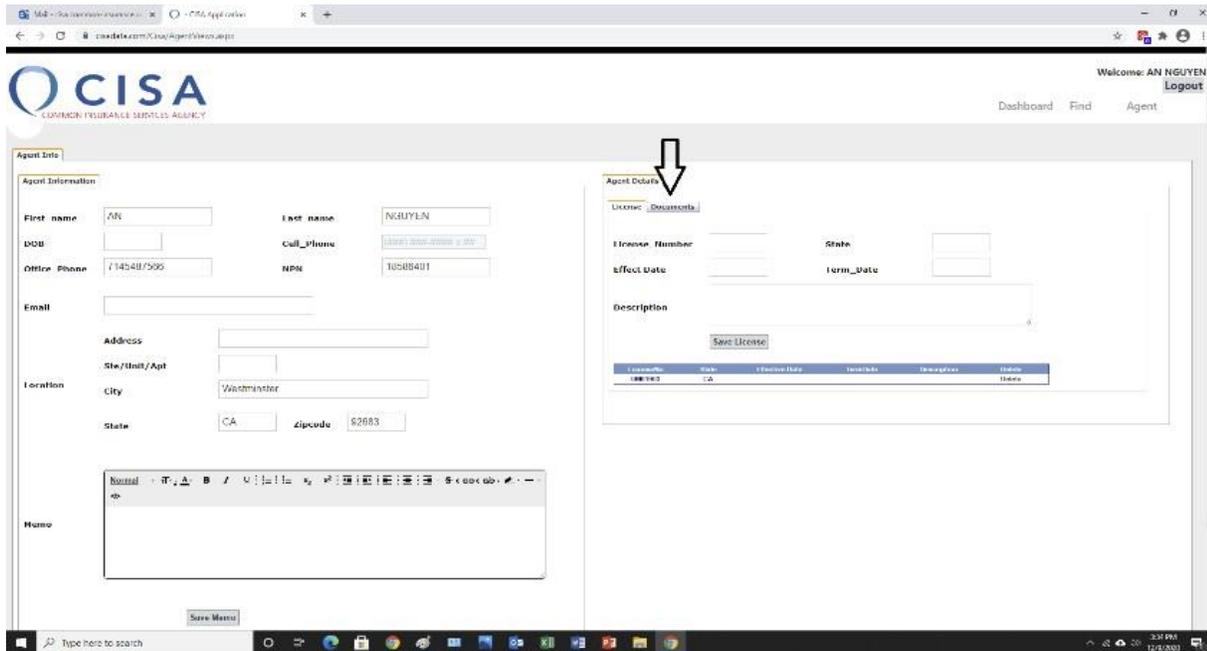
   b. Then click the "Choose File" button, to choose and upload your file to our database. When uploading a file please note that you are only able to upload word or pdf documents to our database. Files that are accepted are .pdf, .doc, and .docx.
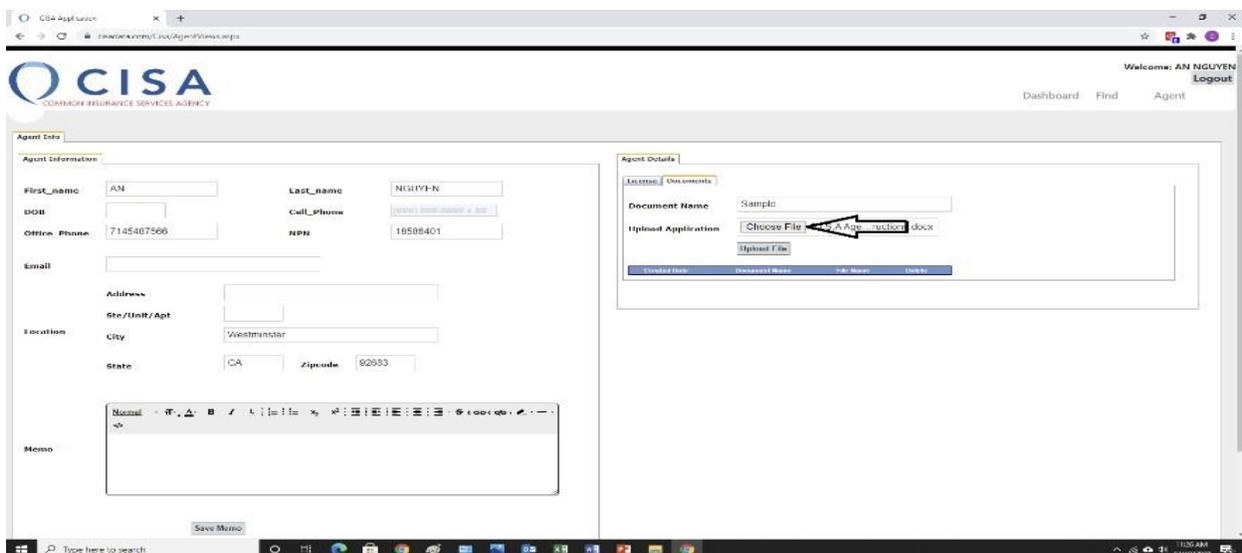
c. Additionally, please label the document on the 'Document Name' box. If you are uploading an application please list the beneficiary's name along with the date of upload. Do not put any punctuation in the 'Document Name' box as the file will not upload with any punctuation in the box.
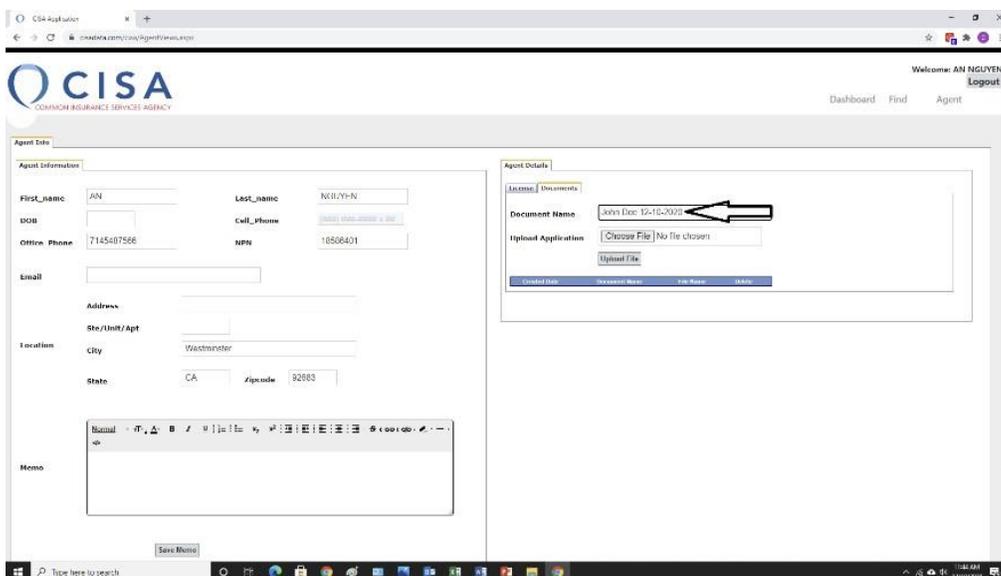
d. Once you have selected the file and clicked 'upload file' another window will appear asking if you want to upload the file, select ok. Once you hit ok the file will be uploaded to our database.