

Quick Reference Guide

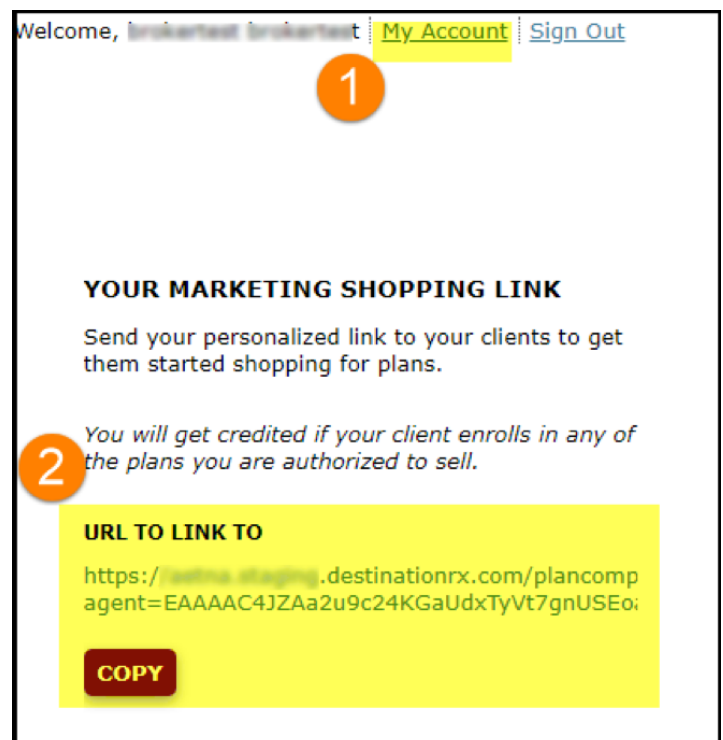
Send multiple quotes at the click of a button!

Send your prospect an electronic quote, via email, that will allow them to view details of the plans offered. The prospect can enroll themselves and you get credit for these enrollments as the agent.



Promote your very own shopping site – pre-built with your information

See the "My Account" section to copy your personal link and send to your prospects. With one click, they can shop online, and you are credited as the agent when they enroll.



Never worry about processing

Every time you generate an enrollment in the tool, it is sent to the carrier that night.

The most organized book of business


Increased organization - Never lose an enrollment because they are all in one place, just use the 'Search Profiles' option to search your book of business.



Quick Reference Guide

Need a paper trail? No problem!

Print a copy of completed enrollments from the tool any time.

Applicant: Margaret Geneva			
Date and Time (Pacific)	Plan	Confirmation Number	
8/1/2018 4:46:00 PM	Medicare Plan (PPO)	7363N0383A	 View

Built for how you like to work

Need to stop and come back later? Pick right up where you left off when you save an enrollment in progress.

Applicant: Daffy Duck			
Date and Time (Pacific)	Plan	Confirmation Number	
	Medicare Plan (HMO-POS)		Complete saved application

For an in-depth review of all the site features and functions, see the **User's Guide**.

Log in to get started today!

Enrollment 101

There are multiple ways to enroll a beneficiary. Here are the best ways to use each enrollment function:



Shopping URL

- You are remote; communicating by phone or email
- Your beneficiary prefers to shop on their own
- Your beneficiary has access to the web



Start a Consultation

- You are remote or in person
- You are working with a new prospect
- You need to provide this prospect with a personalized quote; utilization, Rx, etc.



Quick Quote

- You are remote; communicating by phone or email
- Your beneficiary has an email address
- You have gone over the plan with your beneficiary, and they don't need to see an in-depth quote



Start a New Enrollment

- You are in person
- Your beneficiary already knows the plan they want
- You are keying in a paper application

Enrollment 101



Shopping URL

Under “My Account” you will find your very own shopping URL to distribute to your beneficiaries. This URL is specific to you, with your contact information. Your beneficiaries can then shop and enroll in the plans you are licensed to sell. You are automatically tagged on every enrollment that happens through your URL for crediting.



Start a Consultation

This function will allow you to create a profile for your beneficiary to be saved within your book of business. You will be prompted to collect information such as age range, health status, subsidy (if applicable) and Rx. Upon entering this information the tool will provide you with a personalized quote and a total out of pocket cost estimation. You will then have the ability to send the personalized quote with the option for your beneficiary to do a self-service enrollment, or move to the electronic enrollment form and submit an application.



Quick Quote

This function will allow you to send plan information to multiple beneficiaries via email, with the option for self-service enrollment. This is a fast path option for those who do not need a personalized projection of costs.



Start a New Enrollment

This is a fast path option which allows you to pull up the electronic enrollment form for a chosen plan without having to go through a consultation.

The 3 things you need to start selling

1

Laptop, desktop or tablet

2

Internet Access



The broker quoting & enrollment portal requires an internet connection. You can utilize a Wifi connection, or there are many versions of portable hotspots available today that will allow you to utilize your device without access to a router, such as; Wireless portable devices, USB plug-in adapters, USB Bluetooth adapters, etc.



For a tablet, you may have internet service integrated within your device. Therefore, you may already fulfill this requirement, if not, you can connect to Wifi.

3

User Access



Your FMO will provide you with a username and password to access your portal to begin selling.



You will be able to reset your username and password at any time if forgotten