Medicare Enrollment

User Guide

MEDICA®

PLAN YEAR 2021

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Introduction

This guide is to assist with the decision support solution that empowers Agents to make personalized Medicare plan recommendations in which Medicare beneficiaries can electronically enroll. Agents can use the tool to match beneficiaries with available plans based on individual preferences and provide them with estimated out-of-pocket costs.

After a beneficiary chooses a plan, this tool can be used to assist the beneficiary with enrollment. Beneficiaries can also self-enroll based on a quote or application that has been sent to them by an agent or an agent's personalized shopping link.

Provides the following benefits in an Omni-channel experience:

- A streamlined shopping workflow for viewing, comparing, and quoting plan options to beneficiaries
- Beneficiary profiles that securely save personal information and keep track of enrollment progress
- A consultation workflow that guides Agents through the process of collecting relevant information for creating personalized recommendations
- Electronic Scope of Appointment to capture required SOA documentation from a beneficiary electronically or to upload files, streamlining the process for agents
- Drug and pharmacy finding tools that allow agents to assist beneficiaries with specific drug and pharmacy coverage questions independent of the shopping and quoting workflow

Altogether these tools enable Agents to recommend the plan that provides the greatest benefit to the beneficiary.

User Interface and Navigation

The tool provides a clean, intuitive layout that allows agents to quickly and easily access the pages and functions needed to perform tasks.

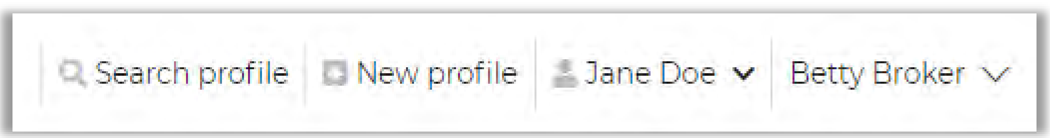
Global Header

Using the Global Header links, agents can *Search* for a profile or create a *New profile* from any page in the system and browse available plans.

- ***Search Profile*** – Click this button to access the Search beneficiaries page, where agents can search for an existing beneficiary profile in the system. If a beneficiary profile exists, this is how agents can access the beneficiary's saved information, including any enrollments in progress. Medica will load your current Medica Medicare membership into the tool.
- ***New Profile*** – Click this button to begin a new consultation for a beneficiary who does not have a profile. If the beneficiary is interested in shopping for a new plan, agents can calculate a personalized view of available plans and estimated out of pocket costs for each plan. They can compare plans, send a quote, and assist the beneficiary in completing enrollment.

Agents will see "- - -"if there is no active Profile they are currently working with or they will see the beneficiary's name if they are working with a specific Profile.

Global header with no active profile



Global header with active profile displaying beneficiary's name

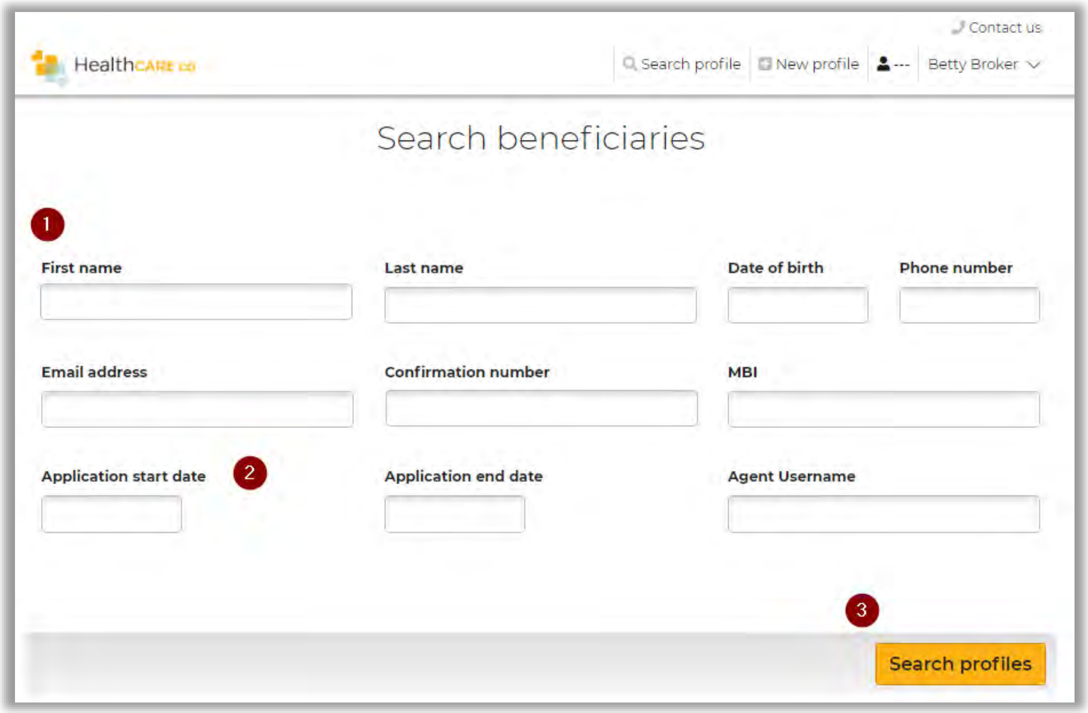
IMPORTANT: If users are already working with a beneficiary profile or are in the middle of another process when they click *Search profile* or *New profile*, any unsaved information is lost.

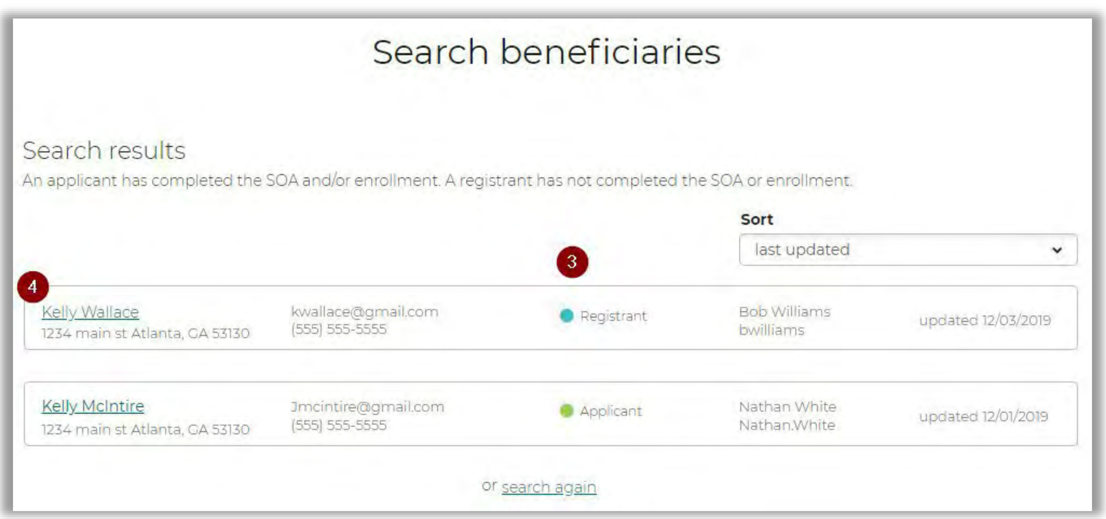
Beneficiary Profile

Search Profile

The Search beneficiaries page allows agents to search for an existing beneficiary's profile and view saved profile information, quoting history, and enrollments in progress or completed. The agent's existing Medica Medicare book of business will automatically be loaded and will be searchable.

The Search beneficiaries page appears when agents first log in. Agents can also access this page by clicking the *Search profile* link in the global header at the top of any page in the site.

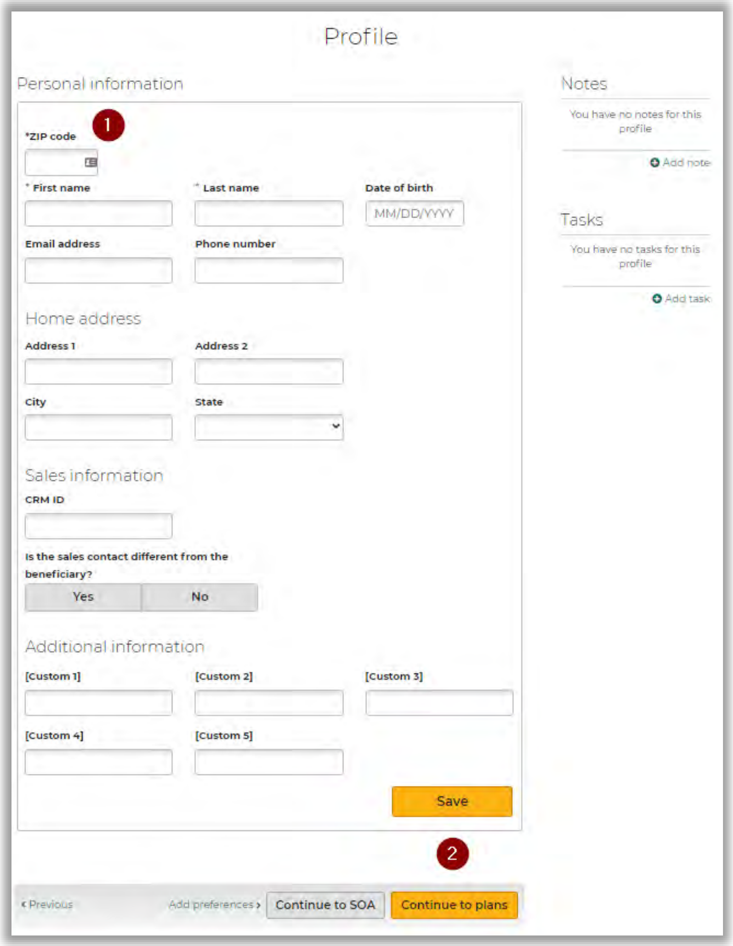




#	TASK	DETAILS
1	Enter search criteria for a profile	To search for a specific beneficiary profile, enter the beneficiary's information in the search parameters. Agents need to enter information in at least one field; however, entering more information will assist in narrowing the search. **NOTE**: If searching by first name and/or last name, enter at least two characters.
2	Enter search criteria for applications	To narrow search results to include only the beneficiaries who started enrollment applications within a specific date range, enter start and end dates in the application search fields.
3	View search results	To find the beneficiary profiles that match the search parameters entered, click *Search*. The search results table displays the results: Profiles in Registrant status indicate a beneficiary who has not started an enrollment application. Profiles in Applicant status indicate a beneficiary who has either started or completed an enrollment application.
4	Access a beneficiary's profile	To access a beneficiary's profile, click the name of the beneficiary and the Edit Profile page opens.

New/Edit Profile

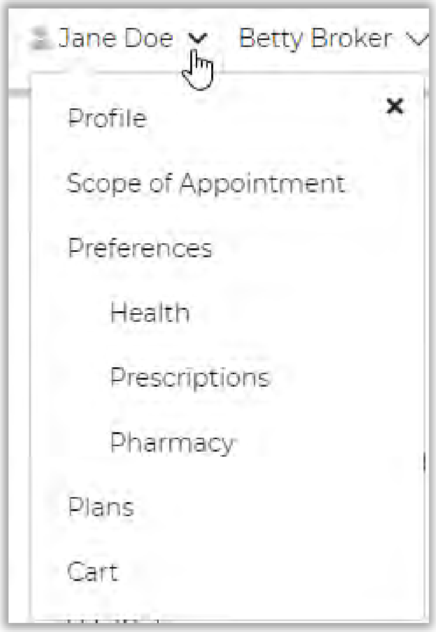
The Profile page allows agents to create a new profile to begin working with a new beneficiary. Agents can access profile information in the future by searching for the profile. Click *New profile* in the Global Header to access the page to create a new profile. Enter the required information and click *Save*.



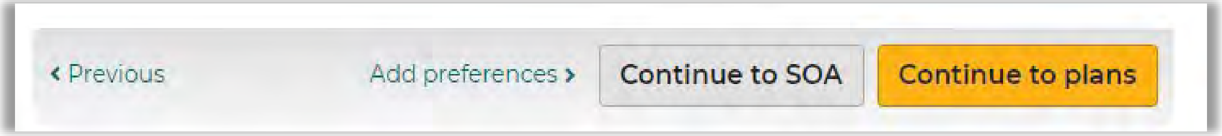
#	TASK	DETAILS
1	Enter or edit beneficiary information	Agents can use the information fields to enter or edit the beneficiary's personal information. Required fields are marked with an asterisk *. Any information added here can be edited in the future. Click *Save* after entering information.
2	Work with the beneficiary	After creating a new profile or accessing an existing profile, agents can edit the beneficiary's information, shop for plans, add preferences information, send a Scope of Appointment or Quick Quote, or start enrollment. To proceed to the next step, click *Continue to plans, Continue to SOA,* or *Add Preferences* below the profile form.

Dropdown Menu and Action Bar

While agents are working with a beneficiary profile, a menu is available in the header at the top of each page. Each menu option represents a page agents can navigate to. These pages allow agents to see or update information.



Agents can use the buttons at the bottom of pages to progress through the site in the recommended order. Navigate to any step and these actions will save information or prompt agents to save anything unsaved on the page.



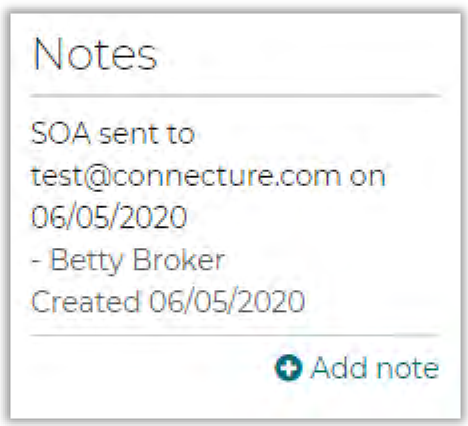
Notes and Tasks

While agents are working with a beneficiary profile, they may need to quickly record miscellaneous information or add tasks to remind themselves to do something. Two quick tools appear on the profile page:

Agents can quickly create notes and tasks for the active profile on the Profile page.

NOTES

Notes allow agents to track miscellaneous information about the beneficiary. Some actions agents perform in the system generate notes automatically. For example, when agents send an electronic scope of appointment form, the email and date are added as a note.

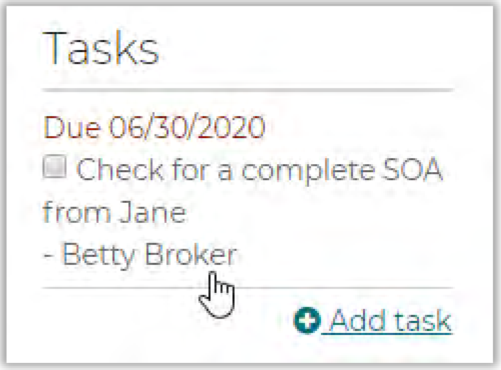


Additionally, agents can manually add notes to keep track of information you gather as they work with a beneficiary.

System generated notes include:

- Sending an electronic Scope of Appointment
- Enrollment Application sent to beneficiary via email and/or text message

TASKS



Tasks allow agents to set reminders to perform actions to assist the beneficiary. You can select a custom due date. The due date determines where the task appears on the task list. Once a task has been checked as completed, it cannot be unchecked again at this time.

For example, agents may want to add tasks for the following types of items:

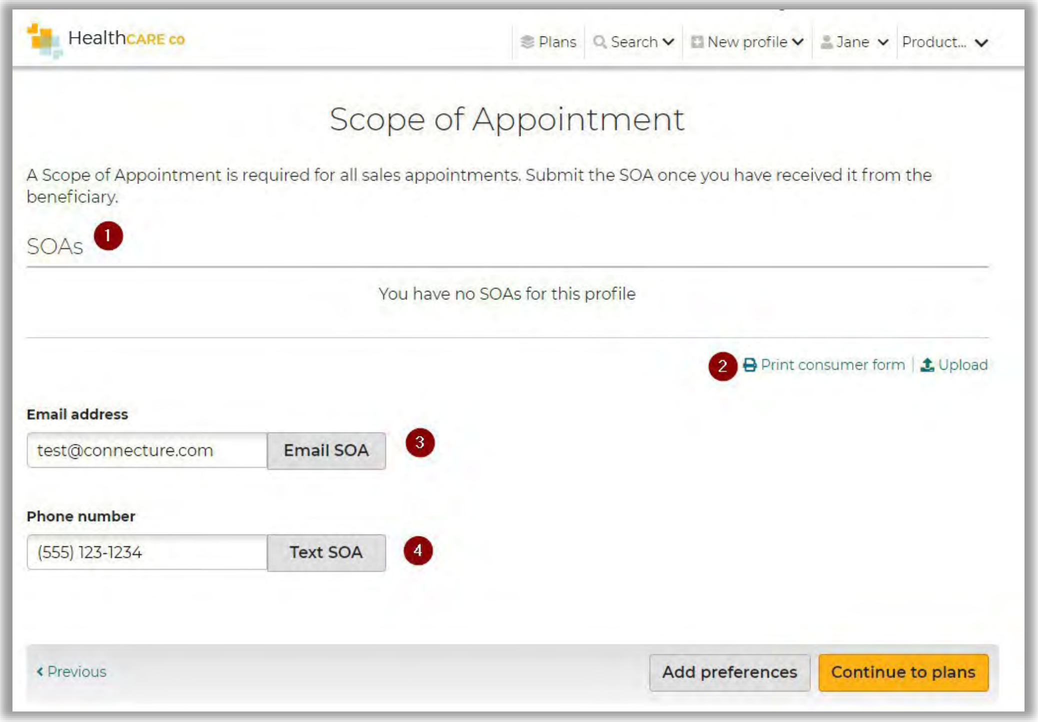
- Check for a completed SOA from the beneficiary
- Email materials to the beneficiary
- Upload/view SOA’s from your desktop
- Document a scheduled meeting date and location with a beneficiary

Scope of Appointment (SOA)

A Scope of Appointment page that allows agents to obtain and manage SOA information for an appointment in the system. This includes an electronic SOA form that agents can email and/or text to the beneficiary, as well as an agent portion of the form that agents can complete and submit in the system after the appointment.

While working with a beneficiary profile, agents can access this page by clicking the beneficiary name in the Global Header and selecting the *SOA* menu option or clicking *Continue to SOA* from the beneficiary's Profile page.

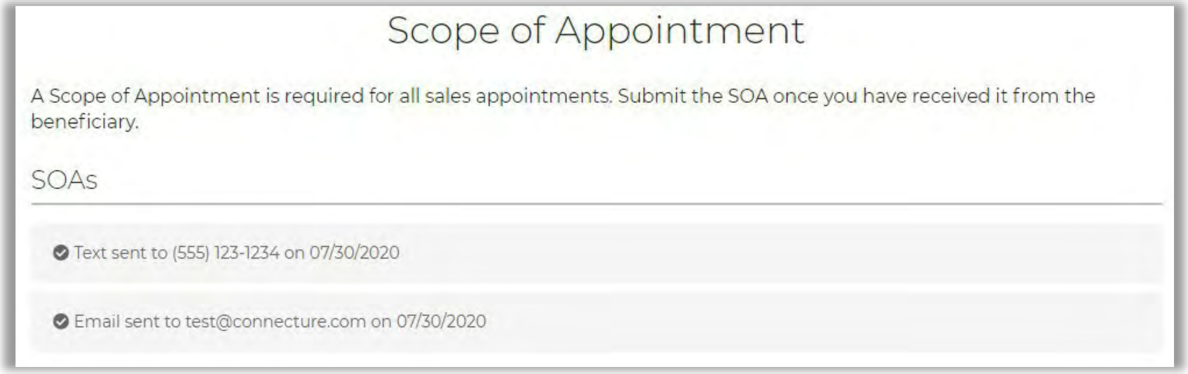
View Before Sending Beneficiary SOA Form



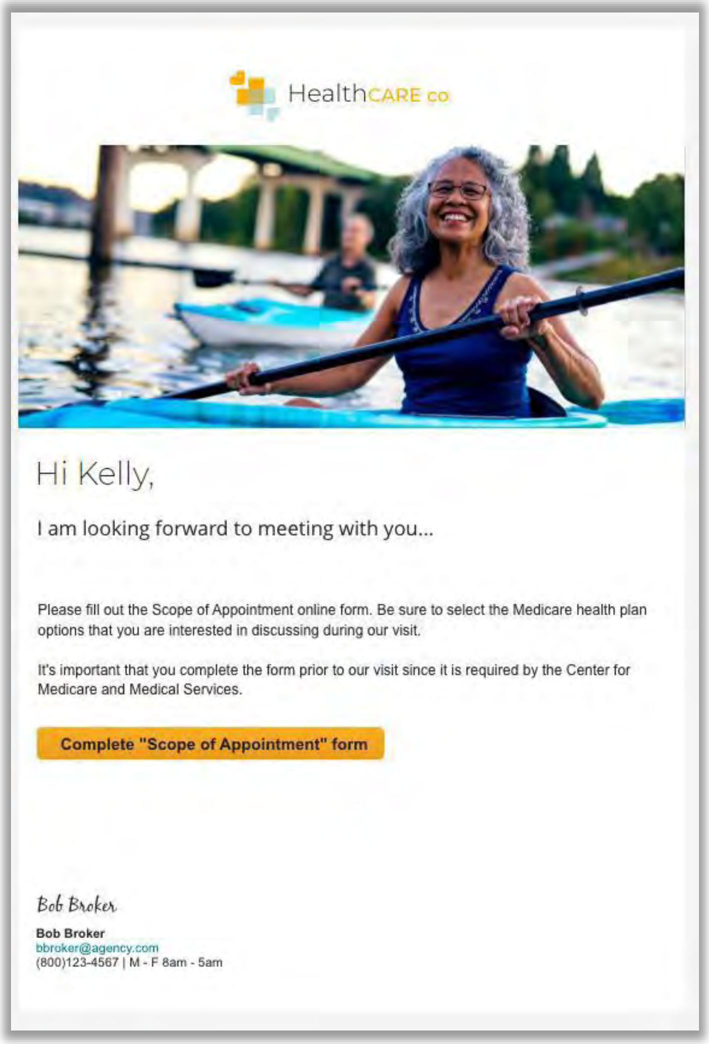
#	TASK	DETAILS
1	Scope of Appointment Section	This section will show all activity of SOAs sent to the beneficiary and list all SOA's that have been collected for a beneficiary. Users will be able to download a pdf copy of a completed SOA (both consumer and agent section completed).
2	Print Form and Upload Documents	Agents can print a blank SOA pdf form for the beneficiary to fill out. They may upload completed hard copy SOAs from files on their desktop. Users may view an uploaded SOA or other document by clicking the document name to download it in the original file type. Accepted file types include pdf, jpg, gif or png that are less than 5 MB each.
3	Email Electronic SOA Form	Start the process by emailing the SOA form to the beneficiary. If the beneficiary's email was previously populated in the profile, it will prepopulate by default. Emailing the SOA is the quickest method to obtain the SOA information as it allows agents to complete and submit the Agent portion of the form online as well.
4	Text SOA Form	Agents can also send the SOA form, the same link they send as an email, by text message.

View after Agent Sends SOA Email to Beneficiary

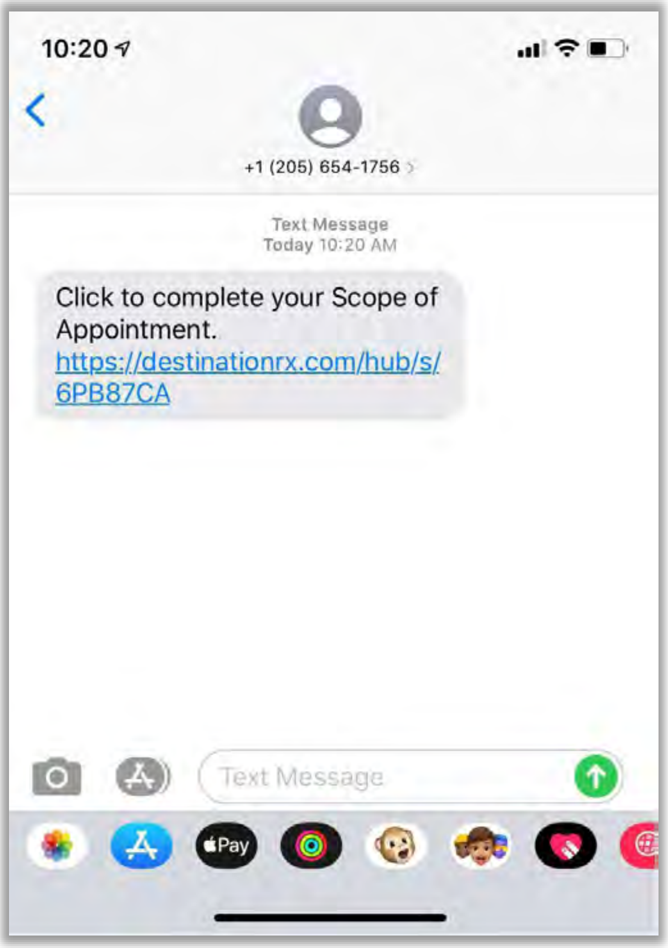
After agents click *Email SOA* or *Text SOA* to send the form to the beneficiary, they will see a notification in the SOAs activity list that it was sent. A note is also automatically added to the Profile Notes section (see Notes and Tasks).



Sample Email Beneficiary Receives to Complete SOA Form

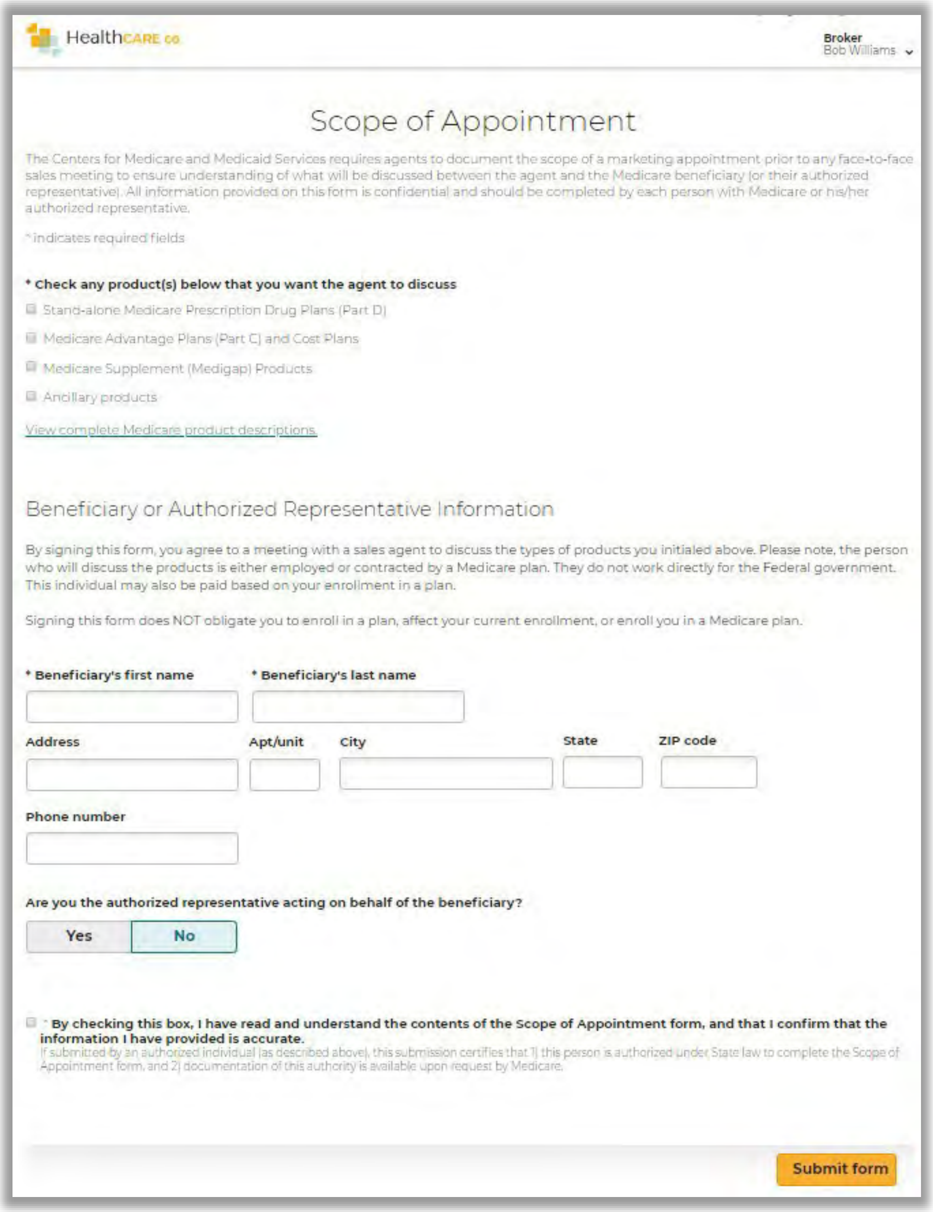


Sample Text Beneficiary Receives to Complete SOA Form



Sample Beneficiary SOA Form

This is a sample of the form the Beneficiary will see when they click the link in the email or the text message to complete the form. They see the agent information in the header, their options to choose from for the appointment to discuss and can submit the form.



HealthCARE co

Broker
Bob Williams

Scope of Appointment

The Centers for Medicare and Medicaid Services requires agents to document the scope of a marketing appointment prior to any face-to-face sales meeting to ensure understanding of what will be discussed between the agent and the Medicare beneficiary (or their authorized representative). All information provided on this form is confidential and should be completed by each person with Medicare or his/her authorized representative.

* indicates required fields

*** Check any product(s) below that you want the agent to discuss**

- [ ] Stand-alone Medicare Prescription Drug Plans (Part D)
- [ ] Medicare Advantage Plans (Part C) and Cost Plans
- [ ] Medicare Supplement (Medigap) Products
- [ ] Ancillary products

View complete Medicare product descriptions

Beneficiary or Authorized Representative Information

By signing this form, you agree to a meeting with a sales agent to discuss the types of products you initialed above. Please note, the person who will discuss the products is either employed or contracted by a Medicare plan. They do not work directly for the Federal government. This individual may also be paid based on your enrollment in a plan.

Signing this form does NOT obligate you to enroll in a plan, affect your current enrollment, or enroll you in a Medicare plan.

*** Beneficiary's first name** | *** Beneficiary's last name**

Address | **Apt/unit** | **City** | **State** | **ZIP code**

Phone number

Are you the authorized representative acting on behalf of the beneficiary?

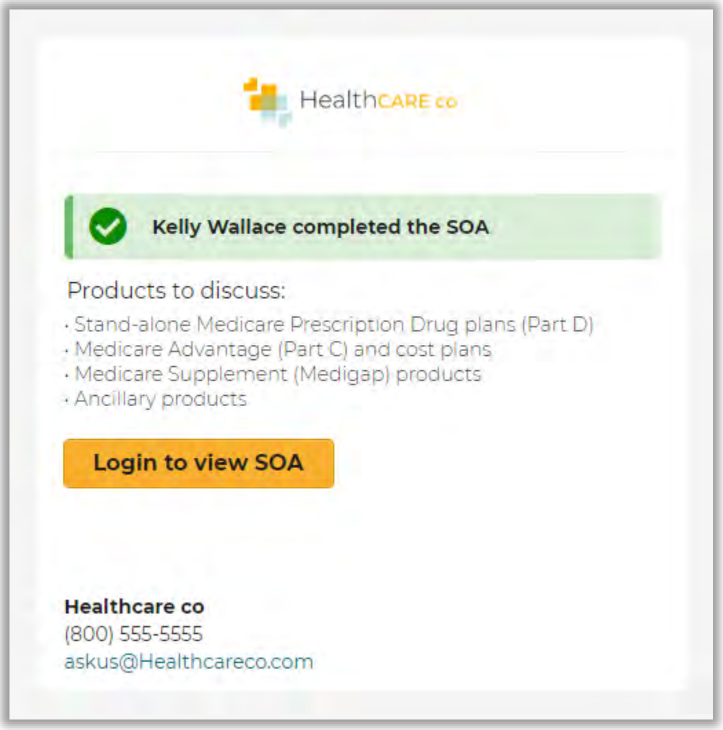
Yes | No

- [ ] * **By checking this box, I have read and understand the contents of the Scope of Appointment form, and that I confirm that the information I have provided is accurate.**
If submitted by an authorized individual (as described above), this submission certifies that 1) this person is authorized under State law to complete the Scope of Appointment form, and 2) documentation of this authority is available upon request by Medicare.

Submit form

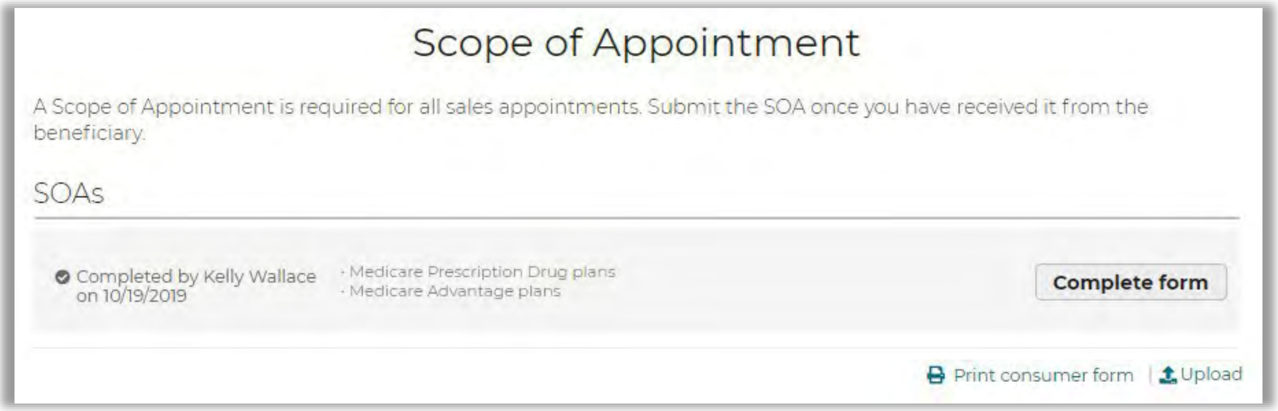
Agent Email Notification – Beneficiary Completed SOA

Once the beneficiary completes and submits the SOA form, the agent who sent the SOA form will receive a notification email (if the agent has an email on file) that the beneficiary has completed their portion.



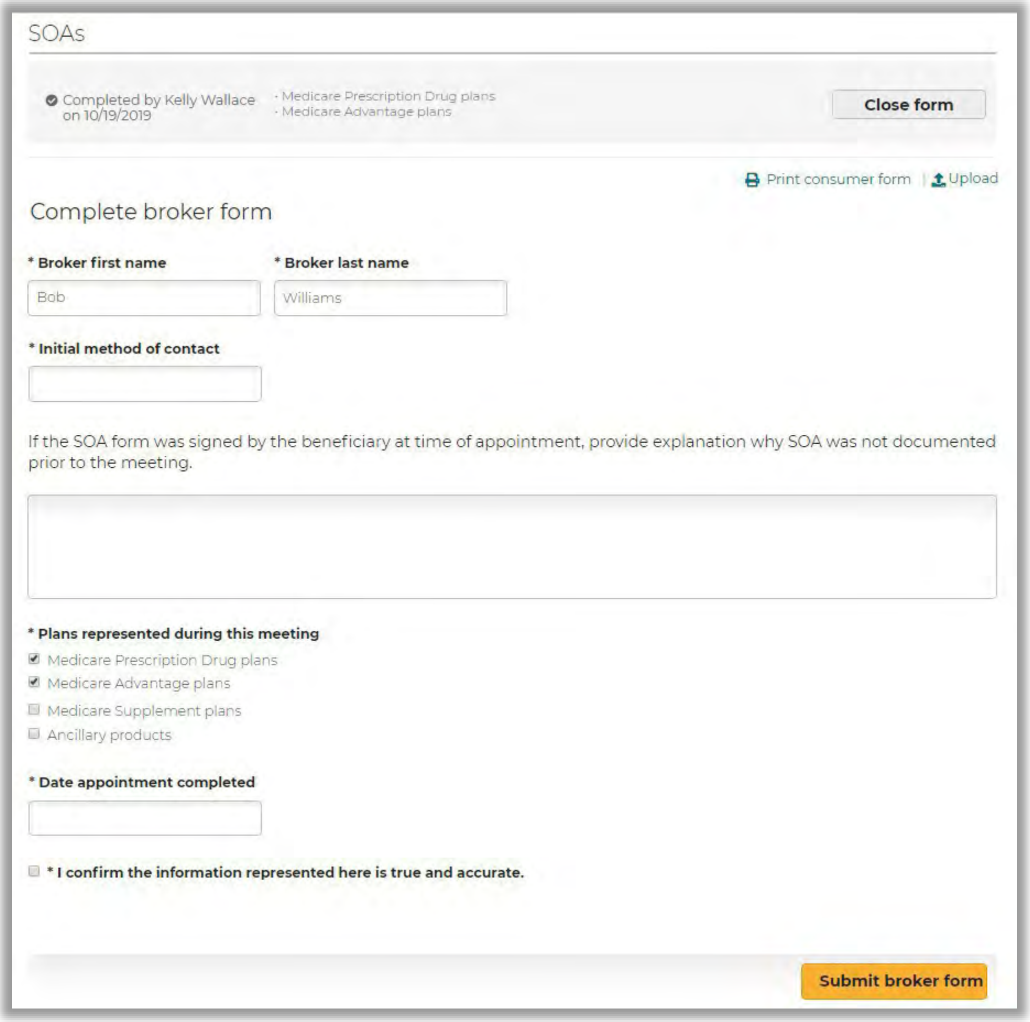
View After Receiving Beneficiary SOA Form

The agent will log in and navigate to the beneficiary's Scope of Appointment page. Here they see the completed form information and the option to Complete form. To open the form, click *Complete form*.

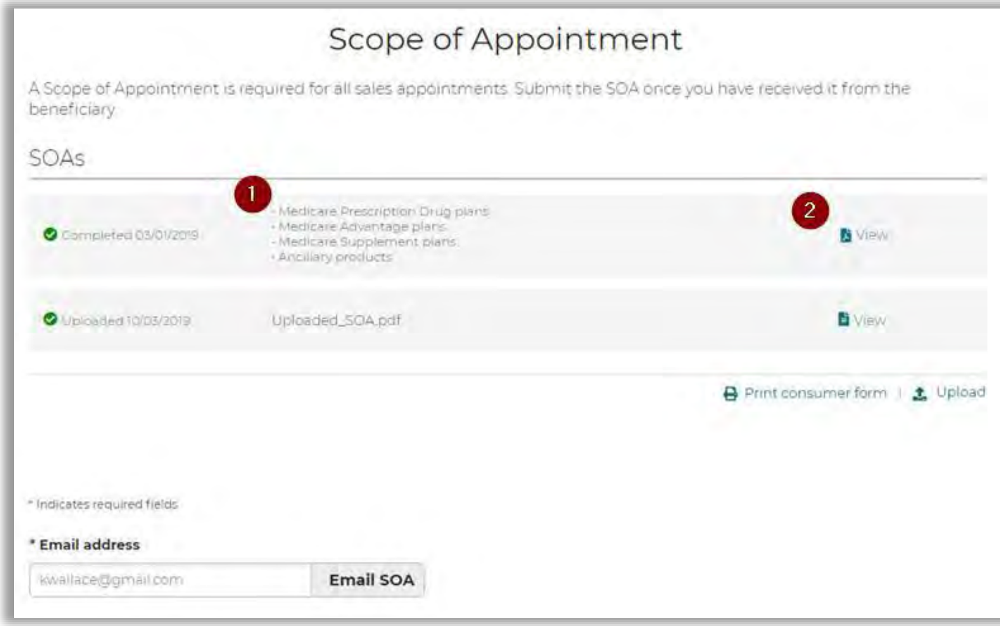


Agent Complete SOA Form

This is a sample of the Agent portion of the SOA form agents will see when you click on *Complete form*. After the meeting or consultation, agents can return to this page to complete the Agent portion of the SOA form. This form allows agents to enter information about the plans that they presented to the beneficiary during the meeting. Fill out the required information and click *Submit broker form*.



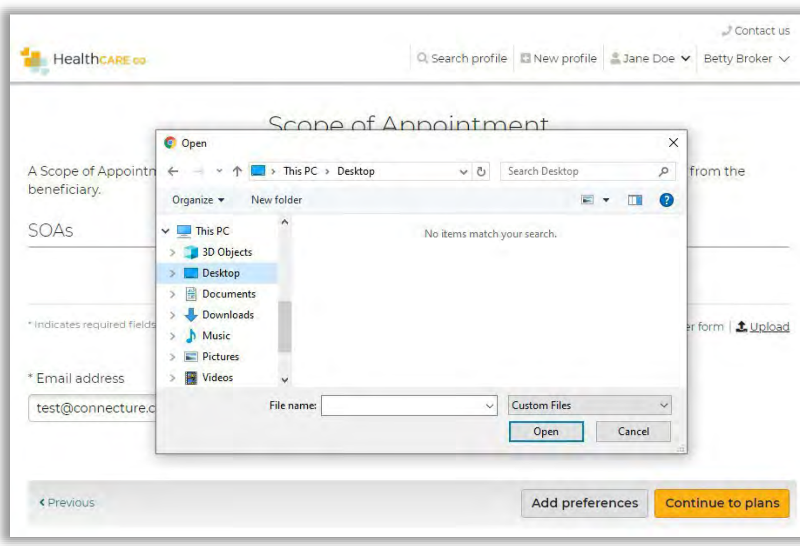
View After Submitting Agent SOA Form



#	TASK	DETAILS
1	View the plan types requested by the beneficiary	If agents use the email method to send the SOA form, after the beneficiary completes the form, this page is automatically updated with the requested plan types that the beneficiary entered. Agents can return to this page to review the plan types that the beneficiary wants to discuss.
2	View a list of submitted SOA forms	Agents can return to this page to view a list of submitted or uploaded SOA forms. Each SOA displays the plan types that the beneficiary expressed interest in. If agents need to view the submitted SOA, they can download by clicking *View*.

Agent Upload SOA Completed Outside of the System

Agents can click the *Upload* link on the SOA page and upload a document for an SOA completed outside of the system. Accepted file types include: .pdf, .jpg, .gif or .png that are less than 5 MB each.



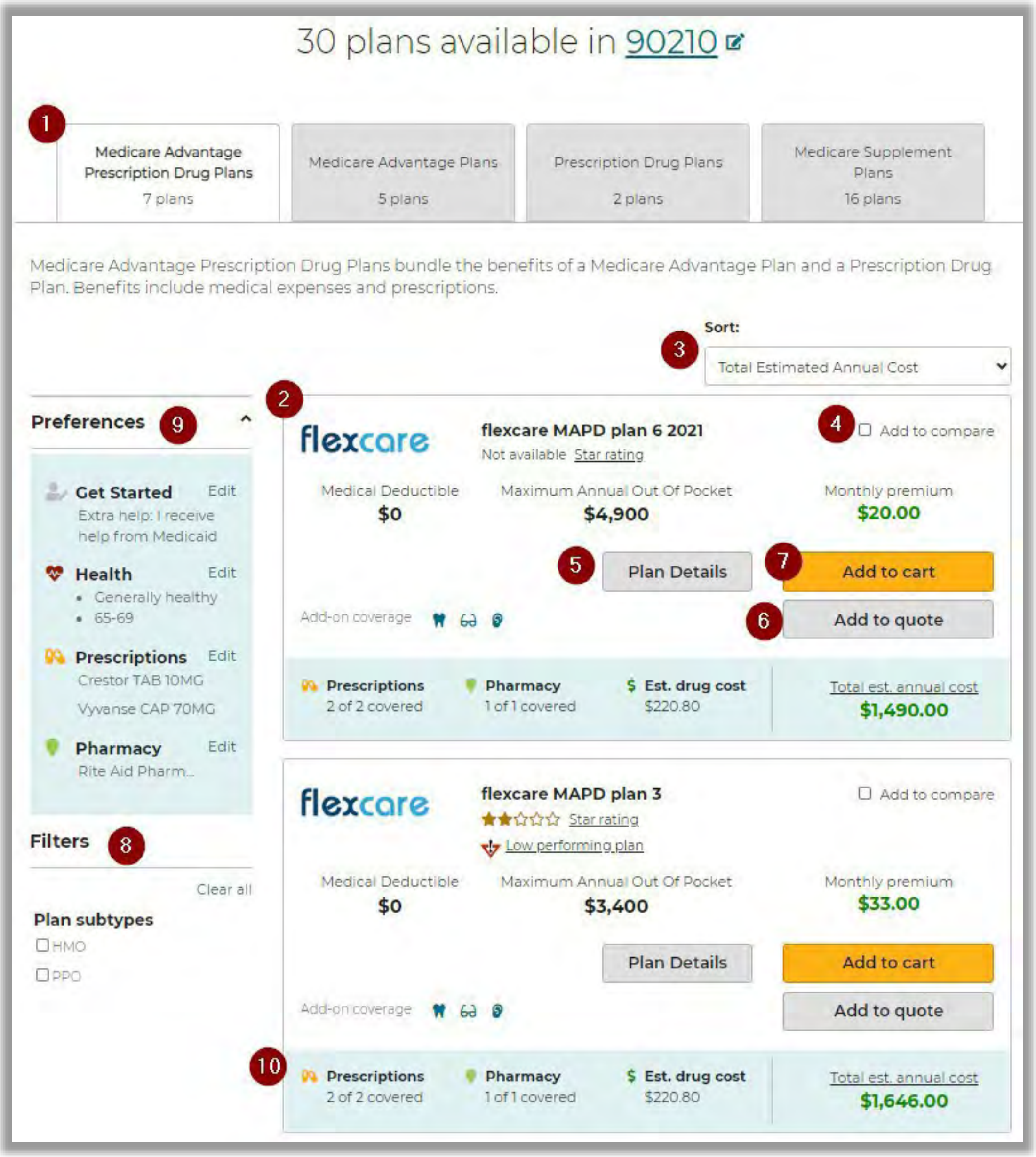
Shopping

Plan List

The Plan List page allows agents to view all the plans that are available in the beneficiary's service area. The available plans, plan pricing, and estimated costs are impacted by several factors including the beneficiary's location, subsidy eligibility, prescription drugs, and pharmacy selected. Plan cost estimates are more accurate with more information entered for the beneficiary.

While working with a beneficiary profile, agents can access this page by:

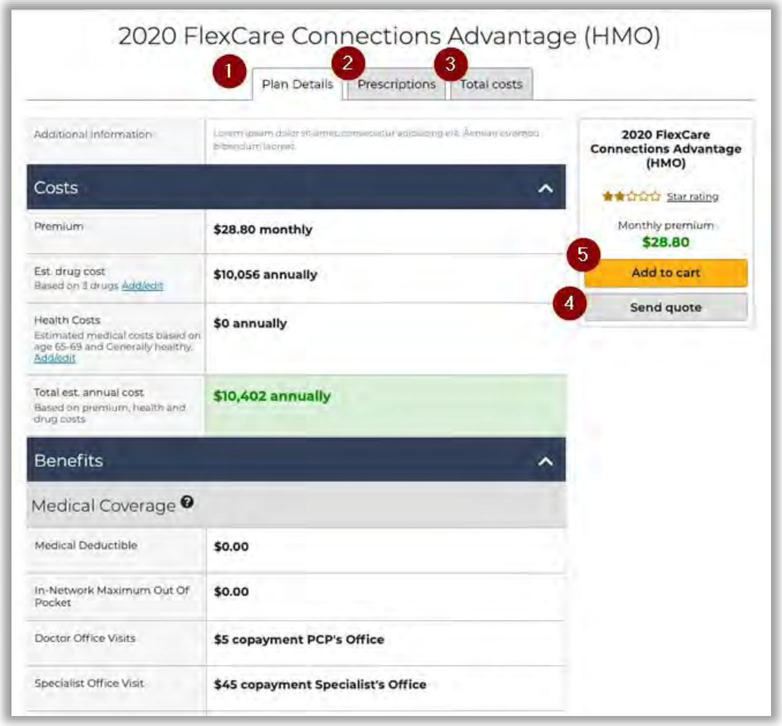
- Selecting the Plans option from the header beneficiary drop down menu
- Clicking *Continue to plans* from the Profile page
- Clicking *Continue* from the Add Pharmacy page
- If enabled, clicking *Plans* in the global header to browse anonymously

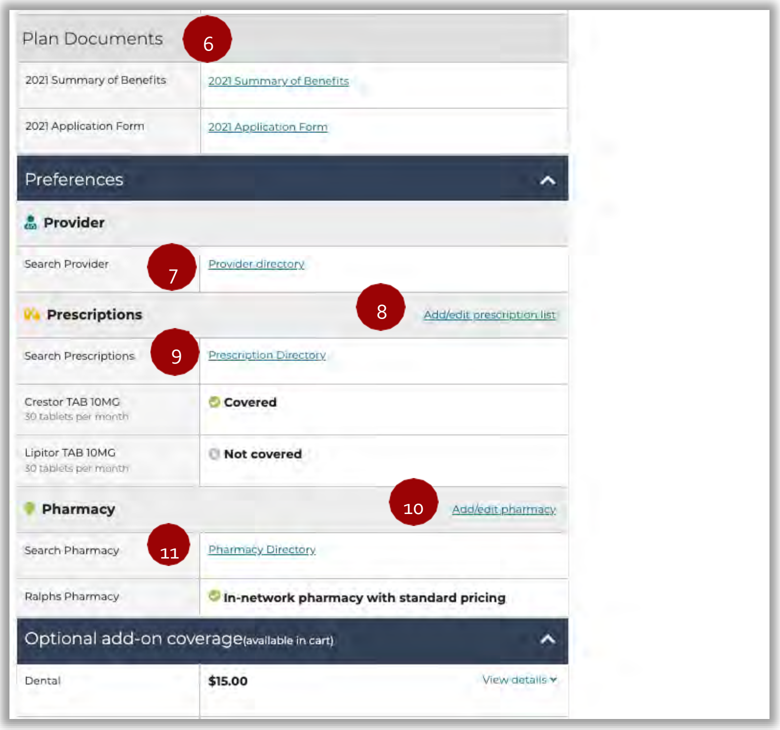


#	TASK	DETAILS
1	Select a plan type	A tab appears for each available plan type. The available plan types vary based on the plans included in the customer's website and the plans that agents are licensed to sell. If a tab is unavailable, it is because no plans of that type are available in this website and in the beneficiary's area. The following default tabs may appear: • Medical and Prescription Drug Plans • Prescription Drug Plans • Medical Only Plans • Medicare Supplement Plans – see "Medicare Supplement Additional Information Window" on the next page To view the plans available for a plan type, select a tab.
2	Review plans	Review the available plans. Plans appear in order based on Total Estimated Costs, with the least expensive plan listed first. For each plan, agents can view plan details and enroll in a plan (if their permissions allow).
3	Sort plans	Agents can use this drop-down menu to sort plans according to the following: • Plan Premium (default for Medical Supplement) • Total Estimated Costs (default for Medicare) • Medicare Star Rating • Plan Name
4	Compare plans	Agents can compare up to 3 plans side by side. Check the *Add to compare* box next to the plans to compare. Click *Compare now*. The plan comparison page will open. Note: in a mobile device, users can only compare 2 plans side by side.
5	View plan details	To view additional plan information, click *Plan Details*. See *Plan Details* section for more information.
6	Send a quote	To send the beneficiary a quote for a plan, click *Add to quote*. See Quoting section in this document for more information.
7	Enroll in a plan	To select a plan and begin enrollment, click *Add to Cart* or *Enroll*. Agents can send beneficiaries applications by email, see Enroll a Beneficiary section in this document for more information.
8	Filter plans	Agents can use the filters to filter plans accordingly to carrier and plan subtype. Filters are data driven and are only shown if there is a plan available for that filter on the plan tab. Filter selections do not carry across tabs.
9	Preferences	Agents can see the preferences information entered for the Profile and easily navigate back to each page to edit or add information.
10	Covered preferences	Agents can see for each plan if the prescriptions and pharmacy are covered, as well as the estimated drug cost, total est. annual cost and health cost (depending on the plan type).

Plan Details

The Plan Details view allows agents to view the details for a specific plan. Agents can access this view from the Plan List page or from the Compare Plans view by clicking the *Plan Details* button.

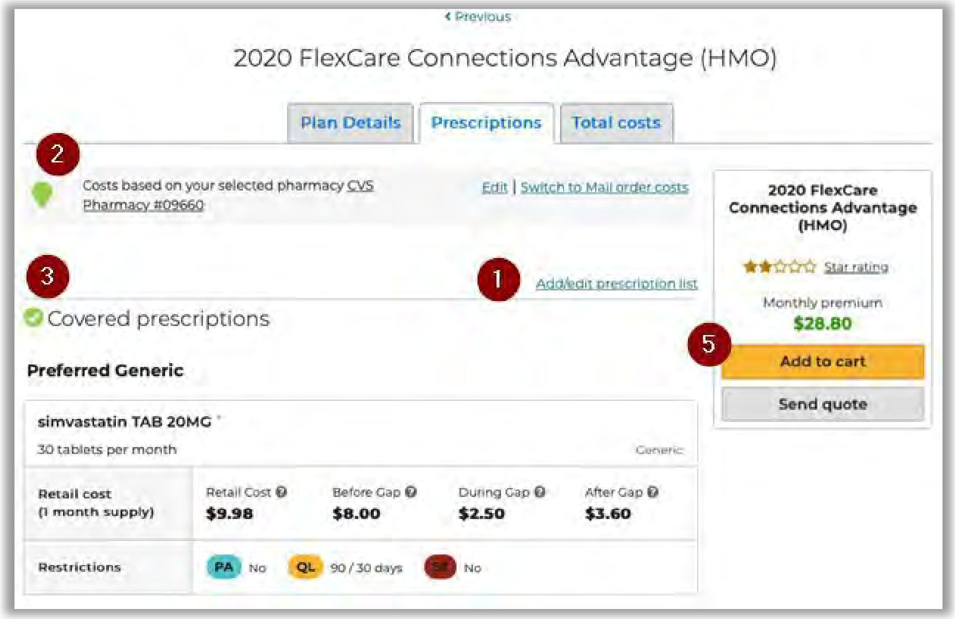


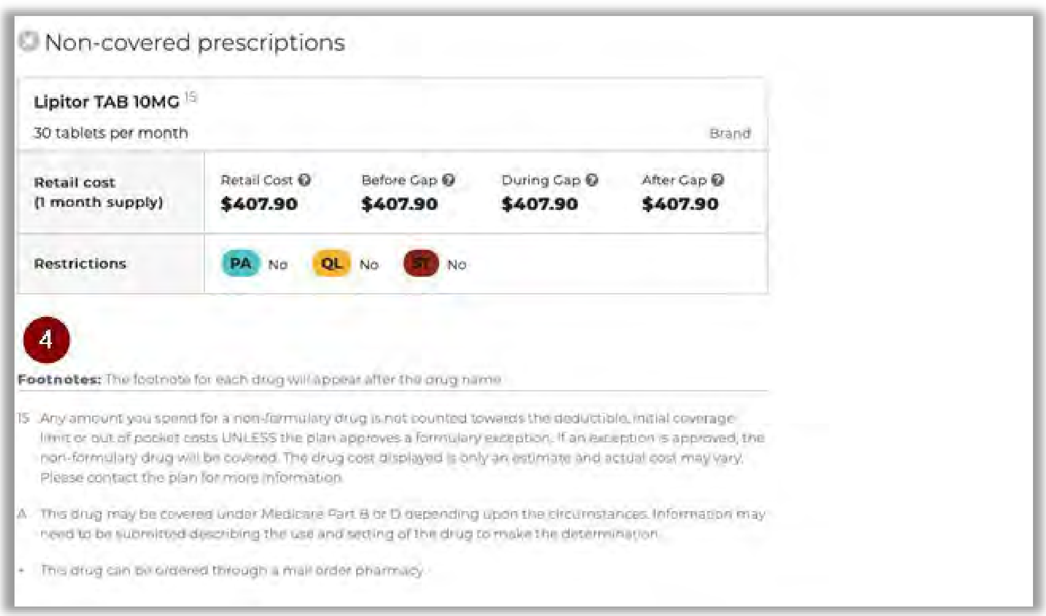


#	TASK	DETAILS
1	Review plan details	The Plan Details view allows you to view plan details, including costs, coverage, and any relevant plan documents.
2	View monthly drug estimates	If the beneficiary is interested in further details on drug pricing for plans with Drug Coverage, click *Prescriptions*. This option is available only for plans with drug coverage.
3	View monthly total costs	If the beneficiary is interested in viewing total estimated out-of-pocket expenses, click *Total Costs.*
4	Send a quote	To send a quote for this plan, click *Send Quote*. A window opens, where you can provide the beneficiary's email address.
5	Enroll in the plan	To enroll in the plan, click *Add to cart*
6	Plan documents	All documents associated with the selected plan are listed in this section. Click on the link to open that document in a new window.
7	Provider directory	This link will be enabled if an external URL is included in the plan data to perform a search for providers for the plan.
8	Edit the drug list	The Plan Details view includes information on which of the beneficiary's drugs are covered by the plan, and which drugs are not covered. If you need to edit the drugs selected for the beneficiary, click the *Add/edit prescriptions* link.
9	Prescription directory	This link will open the Prescriptions tab where a search may be performed for covered prescriptions specific to the plan.
10	Edit selected Pharmacy	The plan details view includes information on pharmacy coverage. If you need to edit the selected Pharmacy, click the *Add/edit pharmacy* link.
11	Pharmacy directory	This link will open the Pharmacy tab where a search may be performed for covered pharmacies specific to the plan.

Prescriptions tab

The Prescriptions tab allows agents to review estimated drug costs and restrictions for a plan. Agents can access this page from the Plan Details view by clicking Prescriptions at the top of the screen.

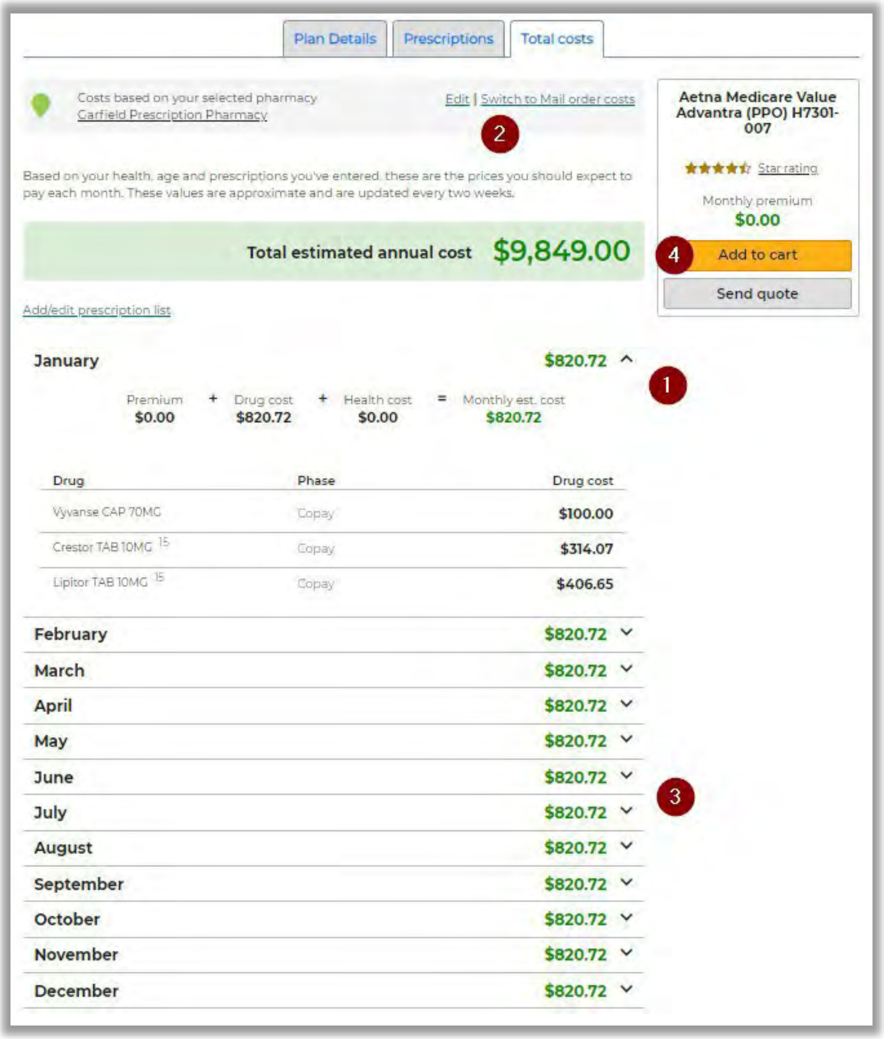




#	TASK	DETAILS
1	Change the selected drugs	If necessary, agents can make changes to the drugs selected by clicking *Add/edit prescription list*.
2	Switch between retail and mail order pricing	Drug retail pricing appears by default. If the beneficiary orders drugs through the mail, agents can view mail order pricing by clicking the *Switch to Mail Order Costs*.
3	Review the selected drugs	This page details the prescriptions drugs that were entered for the beneficiary on the Prescriptions page. This includes drug pricing by phase and any restrictions.
4	Footnotes	A footnote number is displayed next to each drug name for which the footnote is applicable with a detailed description at the bottom of the page. Footnotes dependent on the plan's formulary and pharmacy type are displayed at the bottom of the page.
5	Enroll in the plan	To enroll in the plan, click *Add to cart*.

Total Costs tab

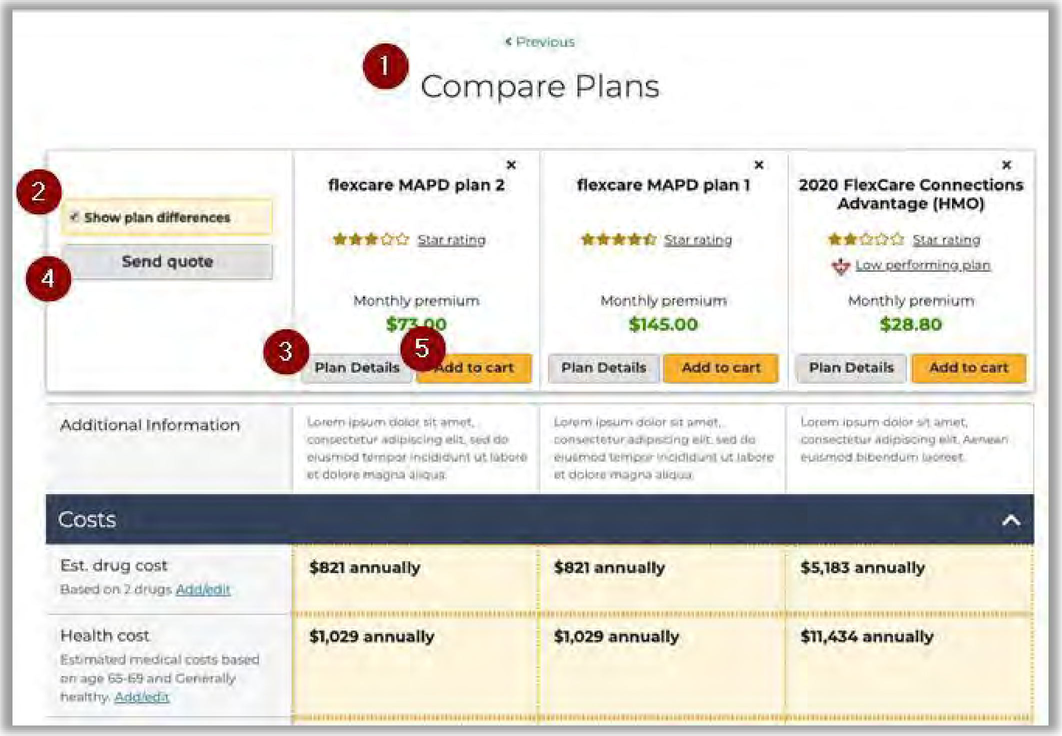
The Total Estimated Costs page allows agents to review the beneficiary's estimated out-of-pocket costs for a plan. Agents can access this page from the Plan Details view by clicking *Total Costs* at the top of the screen.

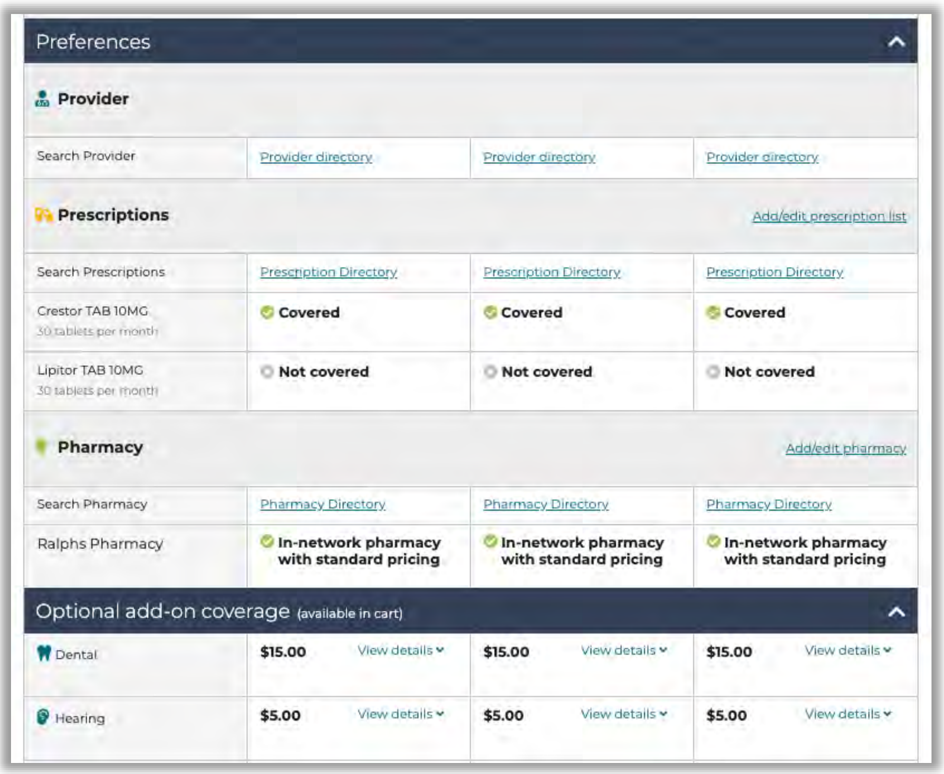


#	TASK	DETAILS
1	Review your total estimated costs by month	The table on this page allows agents to answer any of the beneficiary's questions about how total estimated costs are calculated for this plan. Each month can be expanded to see the Premium, Drug cost per prescription and health cost expected.
2	Switch between retail and mail order pricing	Drug retail pricing appears by default. If the beneficiary orders drugs through the mail, agents can view mail order pricing by clicking the *Switch to Mail Order Costs*.
3	Review estimated drug costs and restrictions	Review the beneficiary's estimated drug costs per month under the selected plan. These amounts are calculated based on the plan's coverage.
4	Enroll in the plan	To enroll in the plan, click *Add to cart*.

Compare Plans

Agents can compare up to 3 plans side by side on the Compare Plans page.



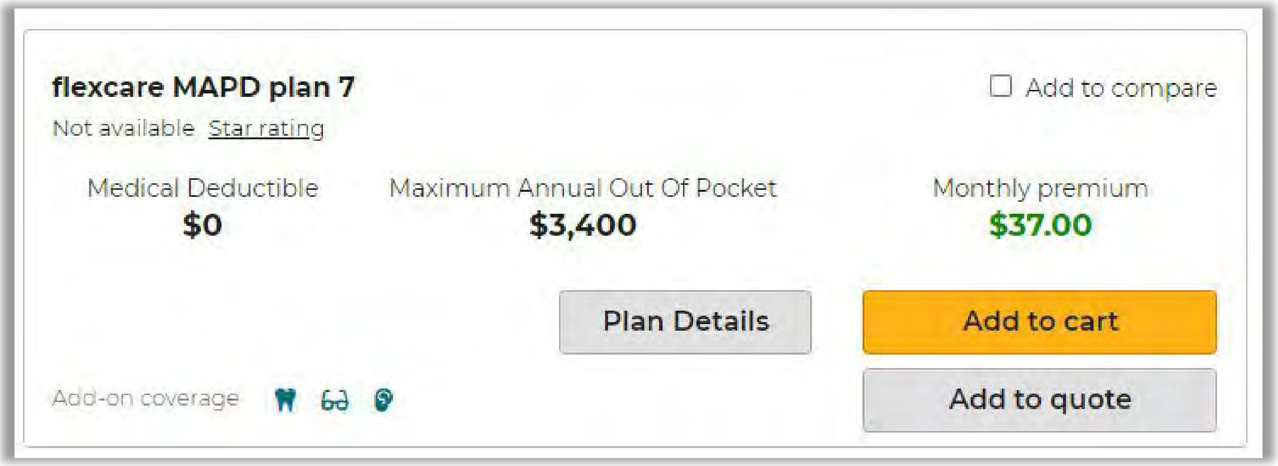


#	TASK	DETAILS
1	Compare plans	The Compare Plans view displays common benefits that agents can compare at a high level across plans. Use the information on this page to compare plans in terms of Costs, Coverage Overview, and Benefits. Use this page to answer many of the beneficiary’s questions about the benefits of one plan versus another.
2	Plan Highlights	Highlights rows when at least one of the plans being compared has a different benefit value.
3	View plan details	If the beneficiary has a question that is not covered on the high-level details provided by the Plan Comparison view, the Plan Details button allows agents to see additional details for a plan.
4	Send a quote	To begin the Quick Quote process for all plans on this page, click *Send Quote*.
5	Enroll in a plan	While agents are on the Compare Plans view, the beneficiary may decide which plan to enroll in. If the company allows online enrollments, agents can begin enrollment by clicking *Add to cart* and using the company's guidelines to complete the online enrollment form.

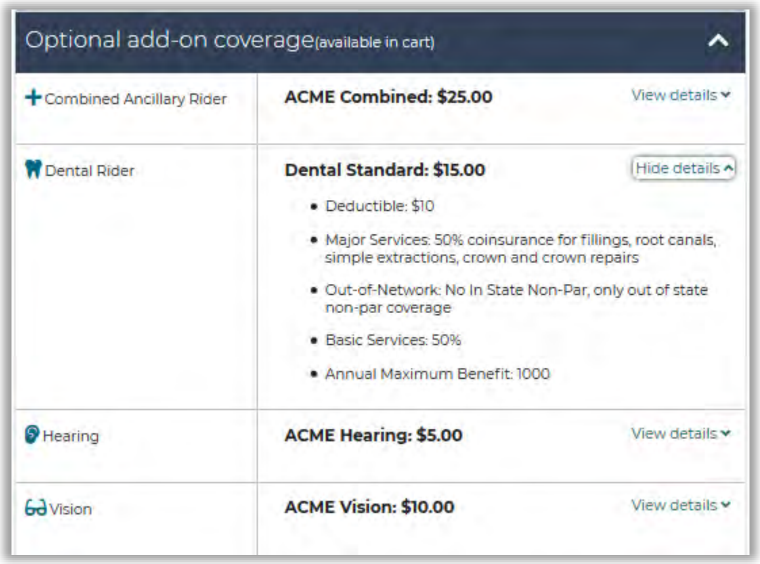
Riders

Riders, also referred to as Add-on coverage, are additional benefits that may be purchased with the selected plan, if offered. The plan cards provide a visual reference to indicate if riders are available for a plan. The benefit details of what a rider covers may be found in plan details, plan compare, and the shopping cart. Riders may only be selected for purchase in the shopping cart.

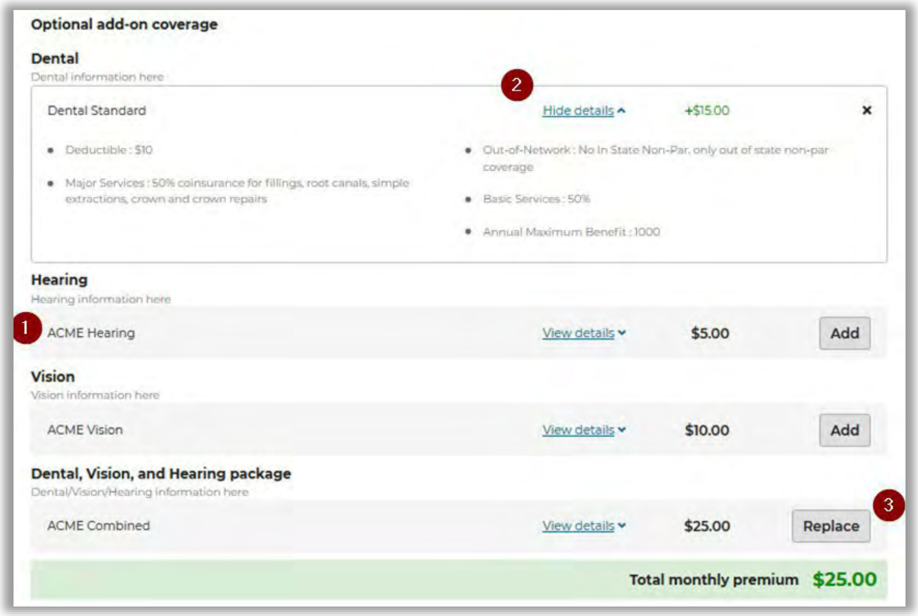
Plan Card



Plan Details



Shopping Cart



#	TASK	DETAILS
1	Rider names	Riders names within each category.
2	View/Hide details	These links will appear if details exist for the rider.
3	Add/Replace buttons	Add the selected rider to the cart. Only one rider for a given type may be added to the cart. For example, if a dental rider is selected and a combined rider also offers dental coverage, the button on the combined rider will have the text *Replace*. If *Replace* is selected, the dental rider previously selected will be deselected automatically.

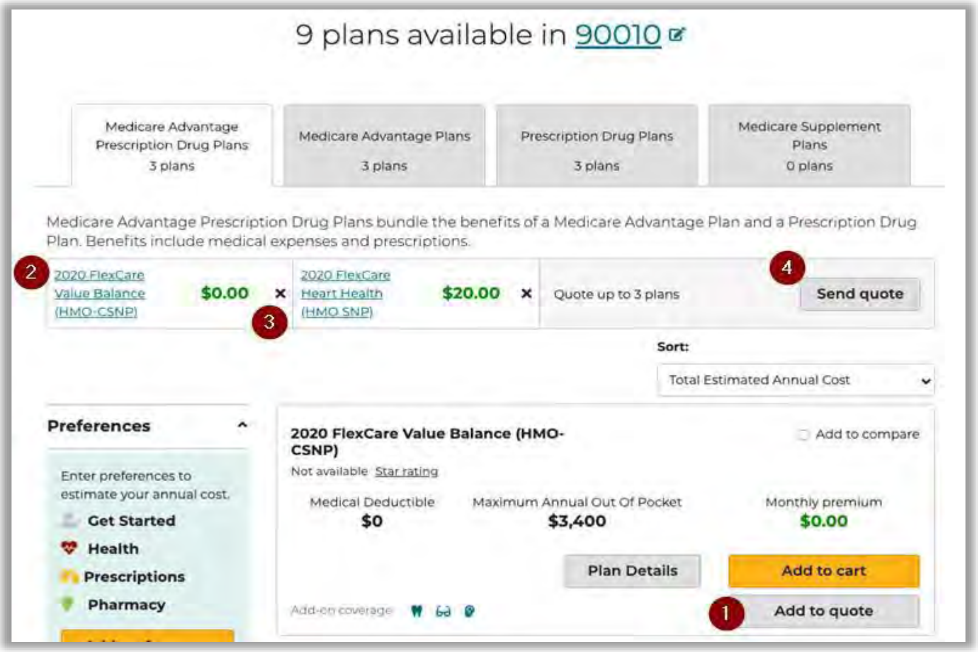
Send a Quote

Quotes are an effective way to deliver plan information and ability to enroll to a beneficiary electronically by sending the quote in an email. The email provides system-generated links that allow beneficiaries to access the website and complete their own enrollments online. The links provided in the email contain the Agent ID, which ensures agents get credit for any enrollments that result from the Quote.

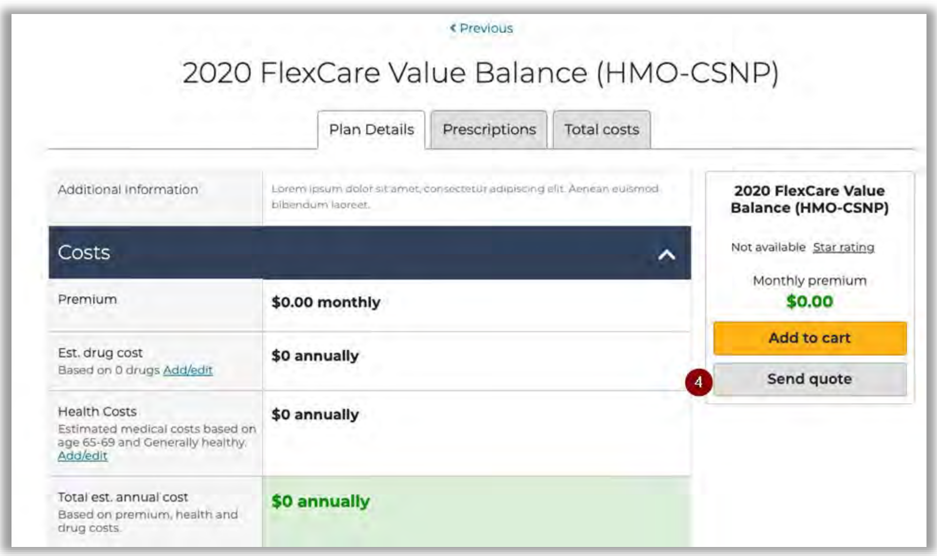
Agents can send a quote for up to 3 plans at a time (plans must be the same plan type).

- If a beneficiary has a profile in the system, agents can send a Quote while shopping for plans through the beneficiary's active profile.
- Add plans to quote - Agents can select up to 3 plans that they want to be included in the quote from the Plans page. A multi-plan quote can include plans of the same plan type i.e. agents cannot send a MA and PDP plan in the same quote
- Send quote – Agents can send a quote to a beneficiary by clicking the *SendQuote* button from the following pages:
    - Plan List
    - Plan Details
    - Compare plans
- Clicking on *Send quote* opens a modal that displays:
    - Email of the beneficiary
    - Custom message
    - Plans included in quote
    - Documents to be sent with quote. Because this feature sends the links to be included with the quote to the beneficiary, it is only available for single plan quotes as to not confuse the beneficiary regarding which documents go with which plans. When the beneficiary comes to the site to look at plans, they can see all available documents online.
- Agents will see a confirmation message when the quote is sent and see the quote history on the beneficiary's profile.

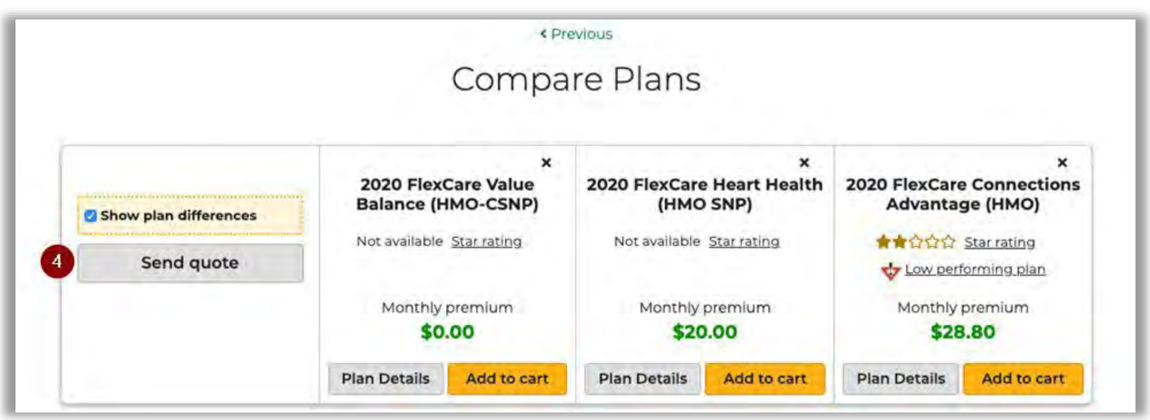
Send Quote from Plan List



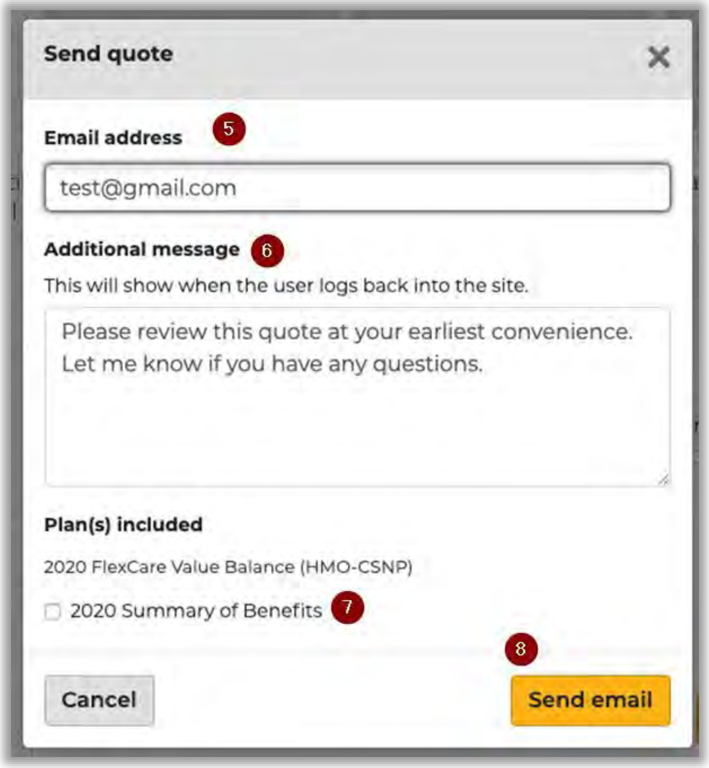
Send Quote from Plan Details



Send Quote from Compare Plans



Send Quote Window



Quote Sent Confirmation

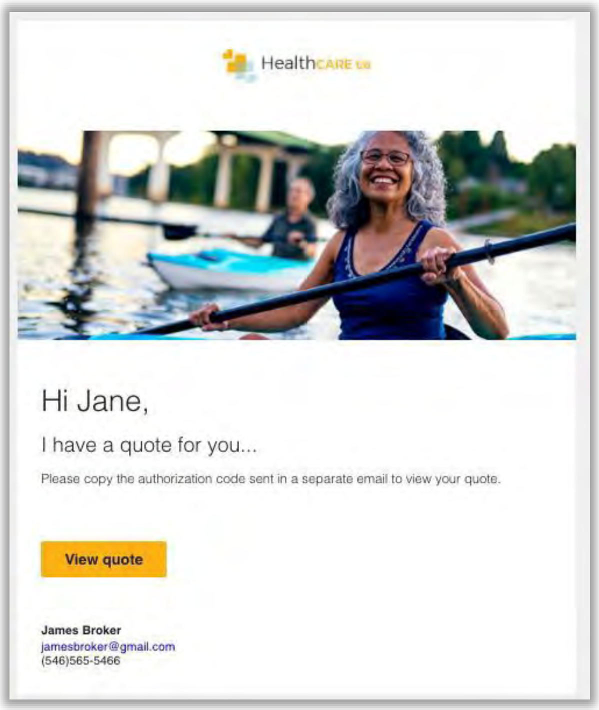
#	TASK	DETAILS
1	Add plans to quote	Select up to 3 plans to add to the quote from the plan list page
2	See plans included in quote	Agents can see the plans selected for the quote, up to 3 plans of the same plan type per quote.

#	TASK	DETAILS
3	Remove a plan from quote	Agents can remove a plan from the quote before sending by clicking the X next to the plan.
4	Send Quote button on Plan list, details and compare pages	Click *Send quote* to open the quote modal.
5	Email address	Enter the email address for the beneficiary receiving the quote. The email address on the profile will pre-fill if there is one available.
6	Customize your message	Agents can customize the message, which the beneficiaries will see when they authenticate into the site to view the quote.
7	Plan documents	For individual plan quotes, choose which plan documents to include in the quote.
8	Send email	Click *Send email* to send to the beneficiary. After sending, agents see a confirmation with the authorization code the beneficiary also receives in the email which is needed to access the quote.

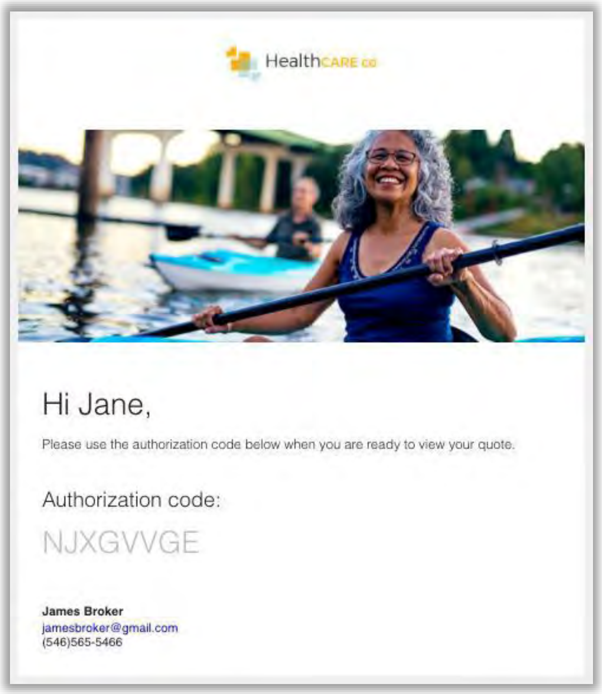
Sample Beneficiary Quote Emails

When a quote is sent successfully, the beneficiary receives two emails that can be used to access the quote: one with the link to view the quote and a separate email with the access code email. These are separate for security reasons because PHI/PII is involved.

The first email has a link to view the quote, along with the name of plans included in the quote and links to any selected when sending the quote:

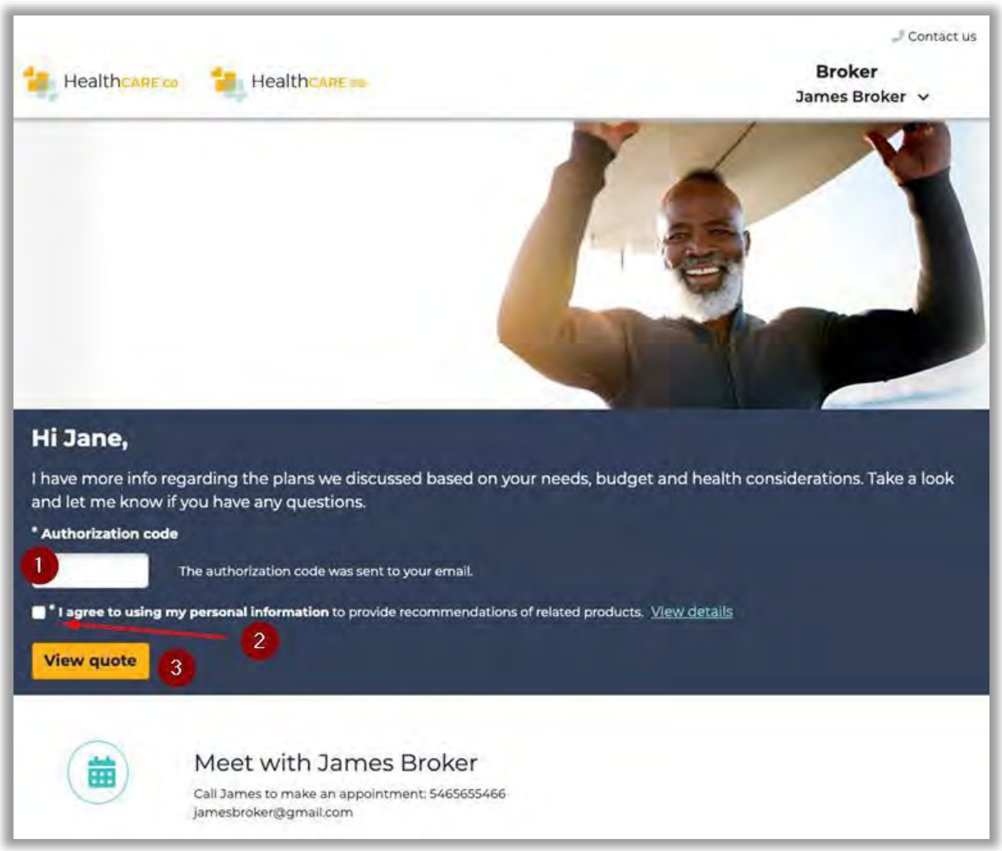


The second email contains a unique system generated authorization code which will be used to authenticate the beneficiary to view the quote:



Beneficiary Quote Authorization

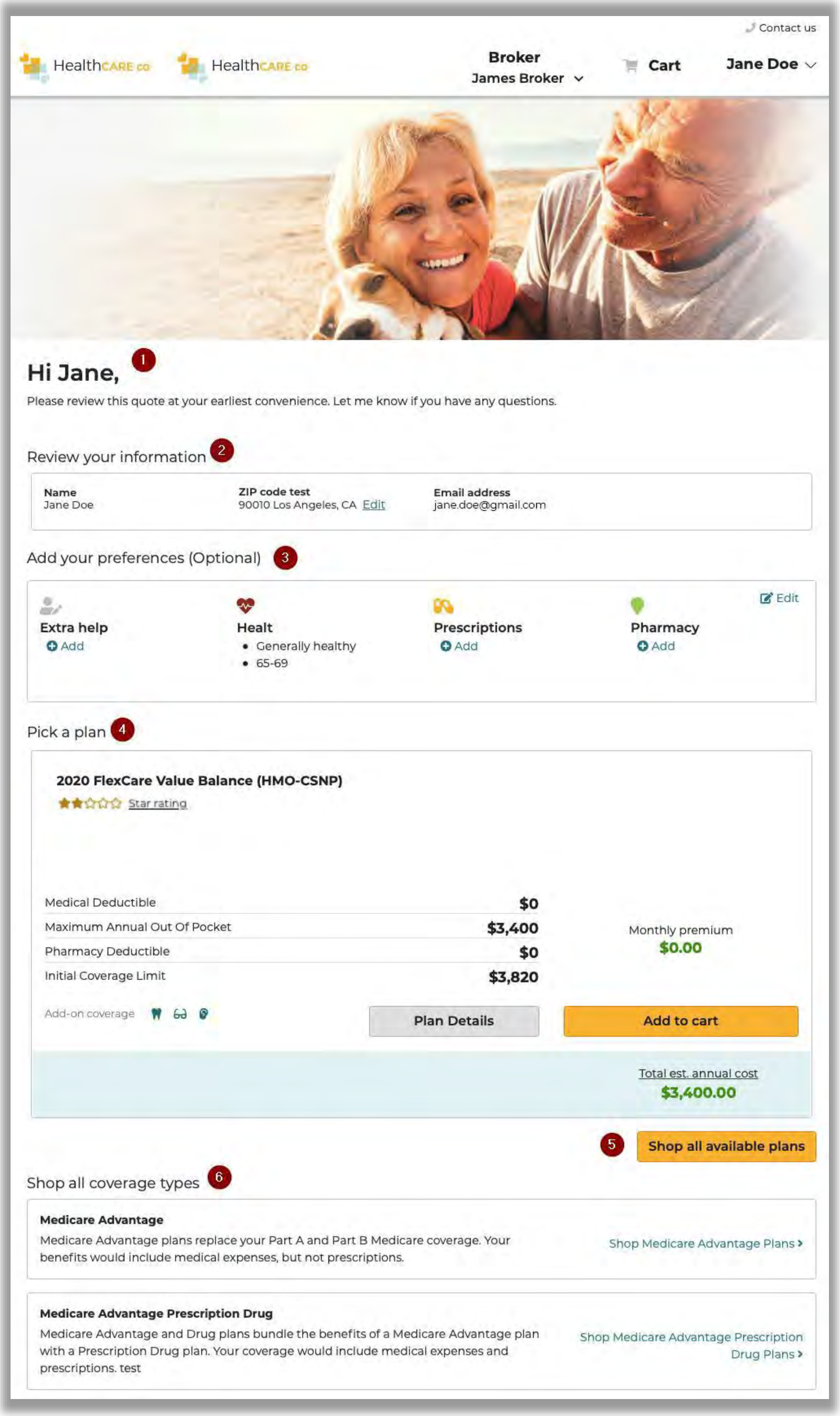
The beneficiary will click on the *View quote* link from the first email to land on the authorization page. Here they can see the broker information in the global header.



#	TASK	DETAILS
1	Authorization code	Beneficiary enters the unique authorization code sent to them with the quote emails.
2	Disclaimer	Beneficiary must check and agree to disclaimer if displayed. Click *View details* for more information on the disclaimers.
3	View quote	Beneficiary clicks on *View quote* button to authenticate and view plans sent in quote.

Beneficiary Quote Summary

Upon successful authentication, the beneficiary lands on the quote summary page.



#	TASK	DETAILS
1	Personalized welcome message	Personalized message agent sent to the beneficiary when sending the quote.
2	Review your information	Authenticated beneficiaries can see their personal information including name, zip, and email.
3	Add your preferences	Beneficiary can view/add/edit their preferences like health status, prescription drugs, and pharmacy.
4	Pick a plan	Plans sent in quote are listed here. Beneficiary can view plan benefits, plan details, or add plan to cart and enroll.
5	Shop all available plans	Clicking *Shop all available plans* navigates beneficiary to the plan list page where they can view and shop for all available plans in their service area.
6	Shop all coverage types	Beneficiary can navigate to plan list page of a particular plan type for additional shopping.

Quote History

Quotes sent to the member are added to the quote history section in the beneficiary profile.

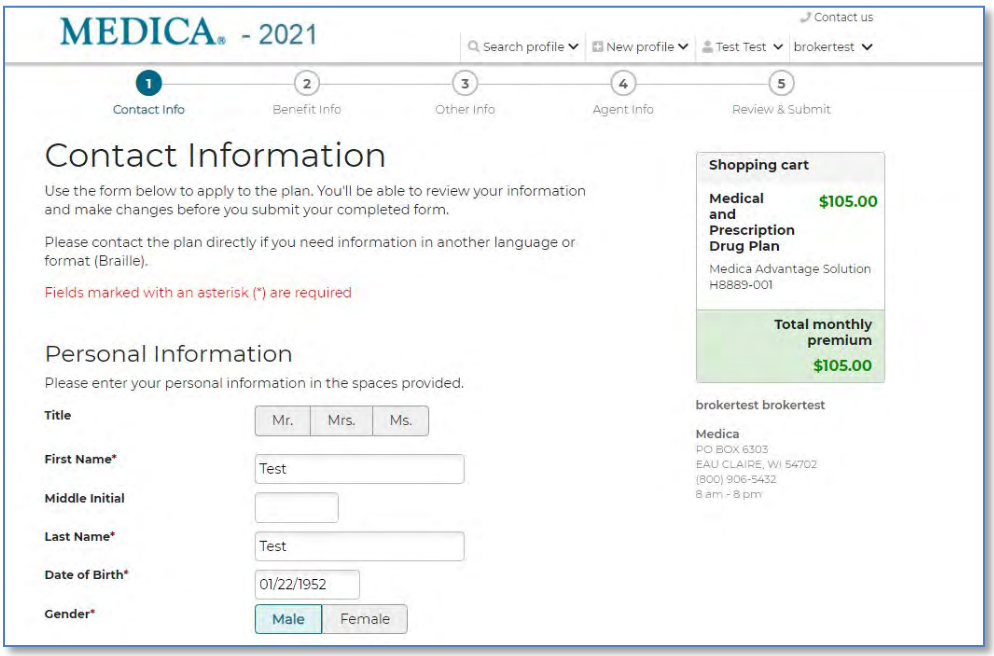
#	TASK	DETAILS
1	Date	Quote sent date in PST
2	Agent details	Username and name of agent who sent the quote
3	Authorization Code	Unique system generated authorization code for that quote
4	Custom message	Customized message included with the quote

Enroll a Beneficiary

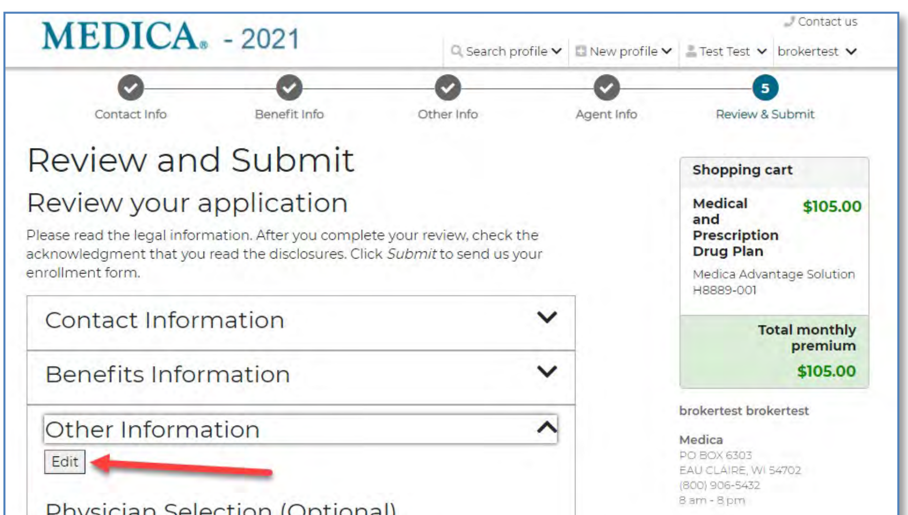
Agent Complete Enrollment Application for Beneficiary

The electronic enrollment form guides the agent through the process of submitting the enrollment application. From the plan list page, an agent can add a plan to the cart. Agents can also start an enrollment from any page within a specific plan by clicking *Add to cart*. This directs the agent to the cart and *Continue to apply* from the cart takes the agent to the enrollment form.

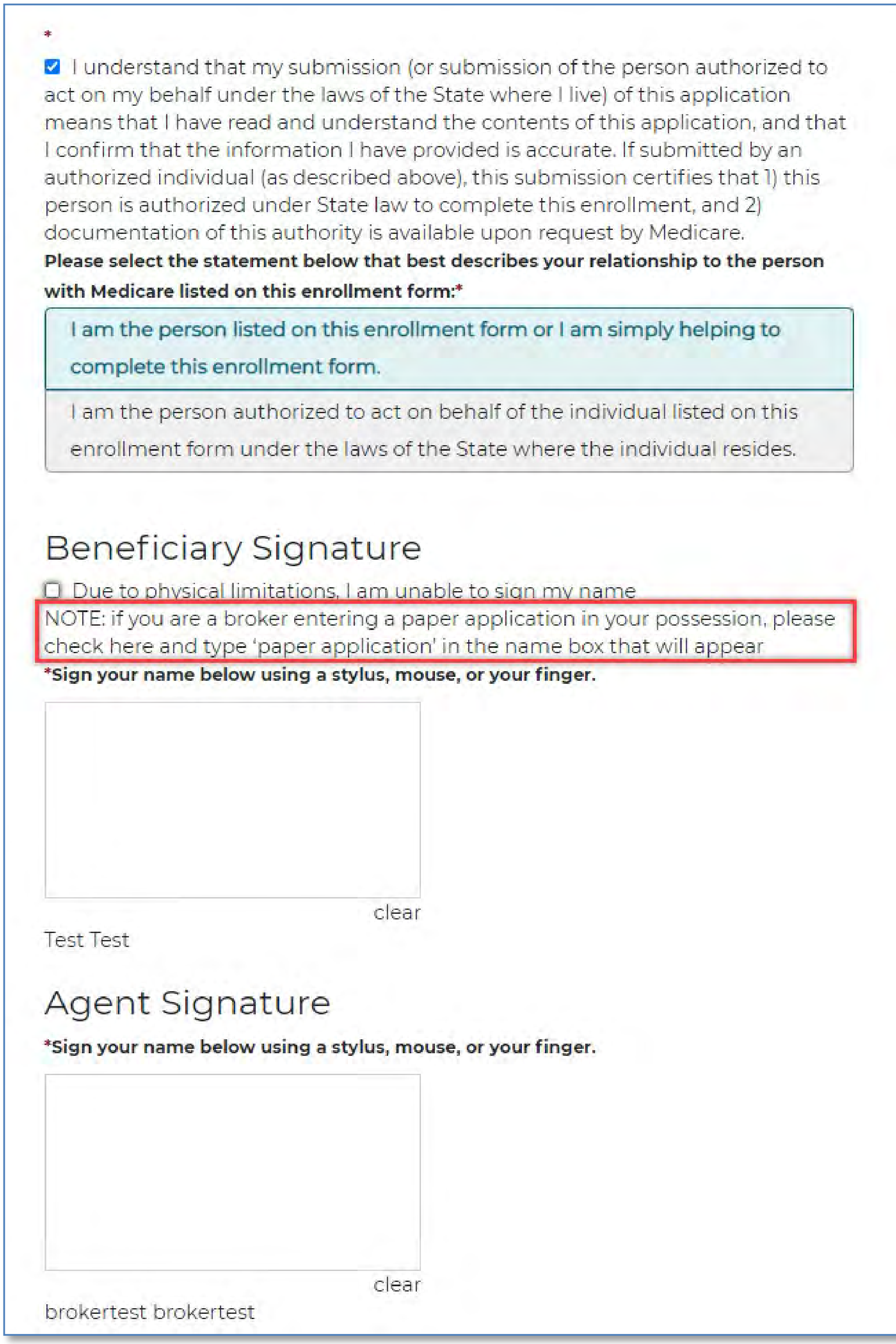
Contact Information is the first of five stages within enrollment. As you complete one stage and click next, you will progress to the next stage. Logic is built into the form to ensure that you do not miss information or enter data in the incorrect format.



You have the ability to edit any information within the Review & Submit section. Clicking the edit button will bring you back to that page. You can progress by clicking the next button again at the bottom or by clicking the Review & Submit number at the top within the flow to progress quicker.



When completing the application, check the attestation box and then select that you are helping to complete the enrollment form. If the beneficiary is present, have them sign via your mouse or their finger if you are completing via tablet or phone. There is also a physical limitations box that can be checked and utilized if you are entering in a paper application.



*

☑ I understand that my submission (or submission of the person authorized to act on my behalf under the laws of the State where I live) of this application means that I have read and understand the contents of this application, and that I confirm that the information I have provided is accurate. If submitted by an authorized individual (as described above), this submission certifies that 1) this person is authorized under State law to complete this enrollment, and 2) documentation of this authority is available upon request by Medicare.

Please select the statement below that best describes your relationship to the person with Medicare listed on this enrollment form:*

I am the person listed on this enrollment form or I am simply helping to complete this enrollment form.

I am the person authorized to act on behalf of the individual listed on this enrollment form under the laws of the State where the individual resides.

Beneficiary Signature

☐ Due to physical limitations, I am unable to sign my name

NOTE: if you are a broker entering a paper application in your possession, please check here and type 'paper application' in the name box that will appear

***Sign your name below using a stylus, mouse, or your finger.**

clear

Test Test

Agent Signature

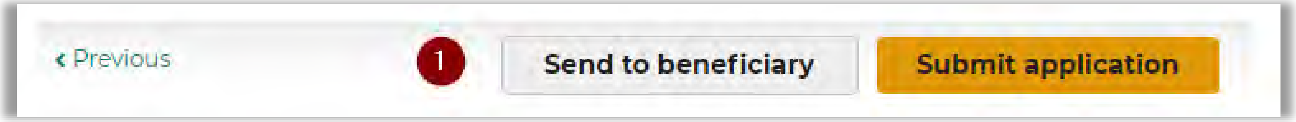
***Sign your name below using a stylus, mouse, or your finger.**

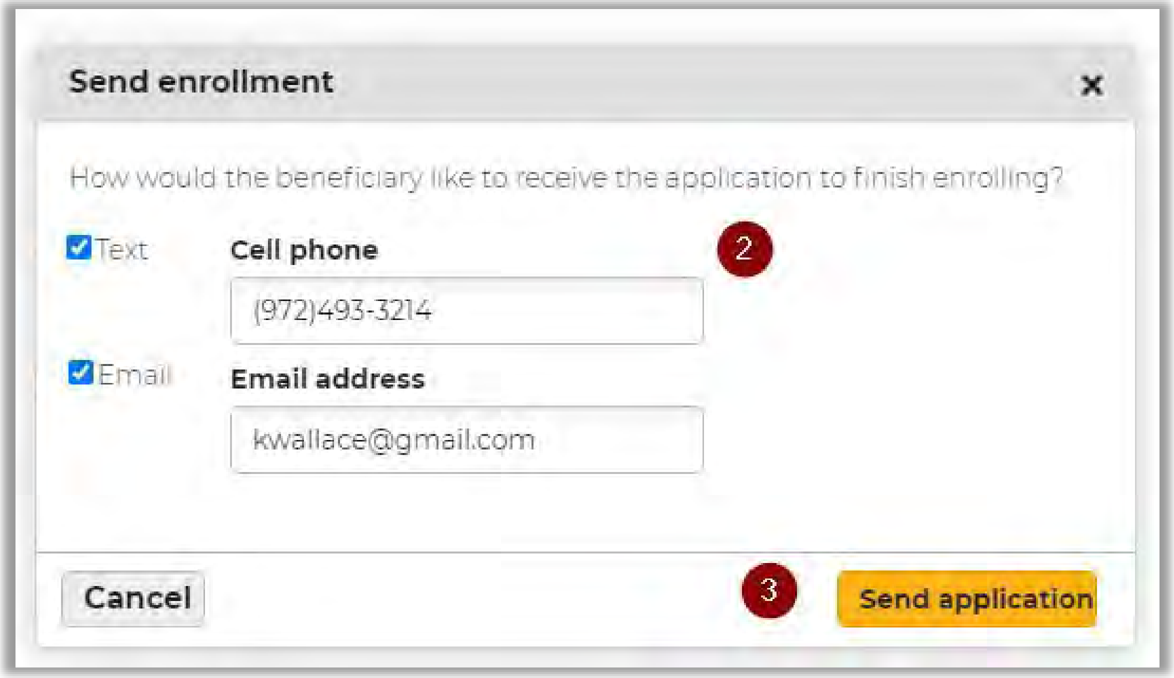
clear

brokertest brokertest

Send Beneficiary Application to Enroll

If the beneficiary has chosen a plan to enroll in, the agent can send an application for a specific plan. Agents can add a plan to the cart, start the application with any information they want to fill in for the beneficiary, and find the *Send to beneficiary* button at the bottom of the last page of the enrollment form.

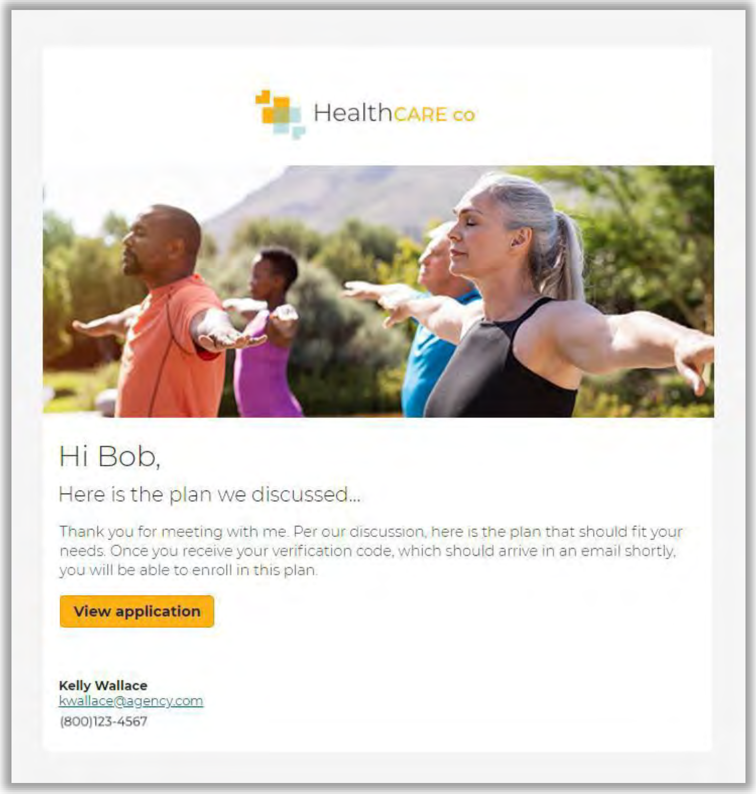




#	TASK	DETAILS
1	Send to beneficiary	From the last page in the enrollment form, click *Send to beneficiary* to choose to send the application by text and/or email.
2	Enter phone and/or email	Type in the phone number and/or email to send the application to the beneficiary. If there is an existing number or email, it will prepopulate. **Confirm the number is a mobile phone and not a landline number.**
3	Send application	Click *Send application* to send the application to the beneficiary. The beneficiary will receive two texts and/or two emails, one with the link and one with the authorization code.

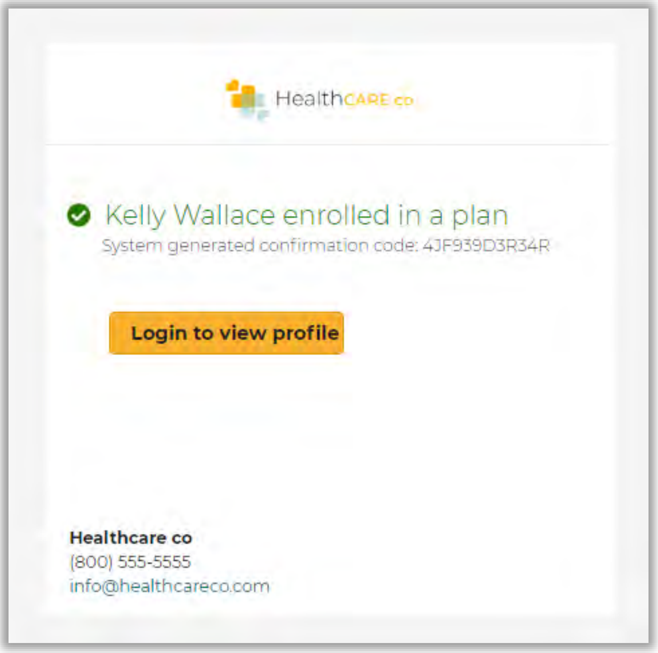
Sample Beneficiary Application Email

This is the email the beneficiary will see when they receive a link to an enrollment application. They will also receive an email with an authorization code to securely authenticate and access the application (see Quoting for example of authorization code email).



Agent Email Notification of Beneficiary Enrollment

When a beneficiary completes an enrollment, if the agent has an email on file then they will receive a notification email. They can log in to view more information related to the profile and enrollment.

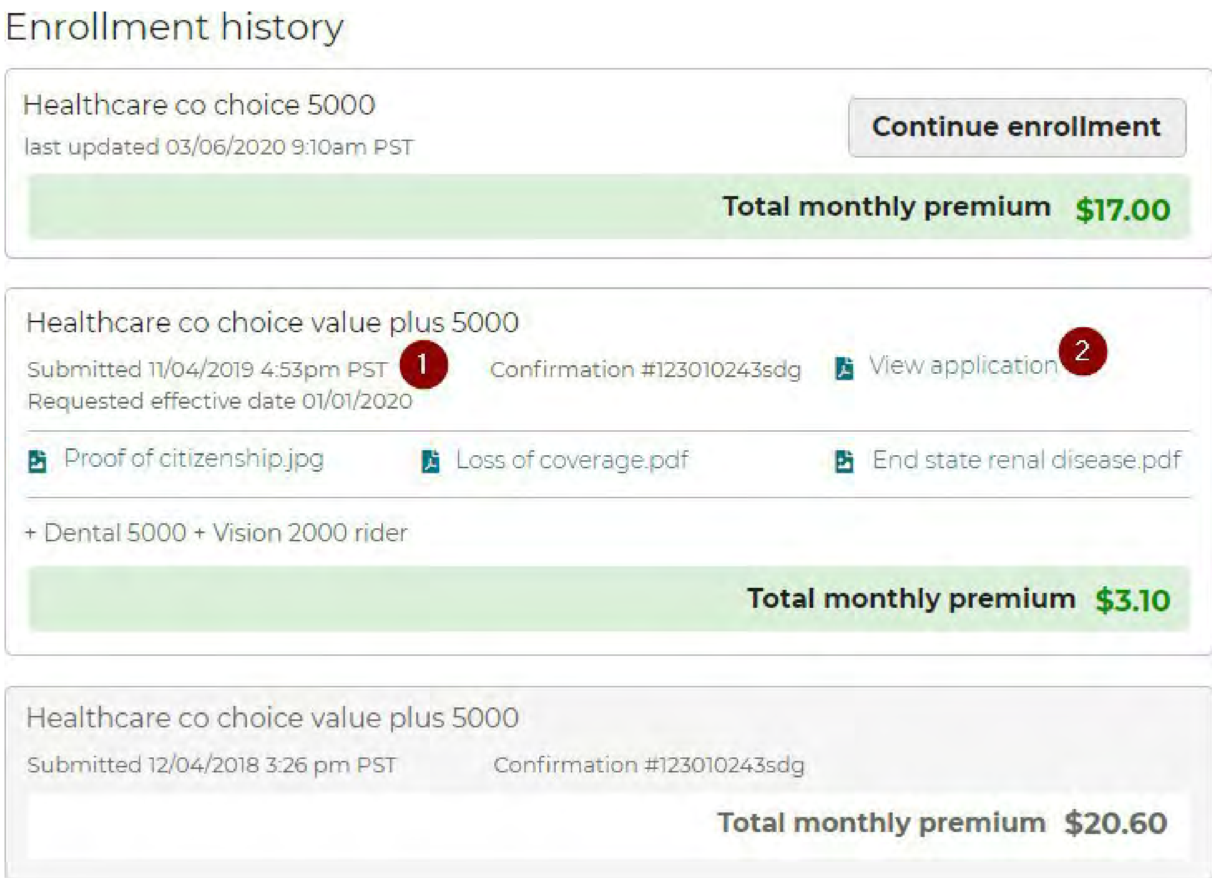


Enrollment History

The Profile page allows agents to view a beneficiary's enrollment history. Agents can access this page by searching for a profile, opening the profile, and then scrolling down to the Enrollment history.

For each beneficiary, agents will see three types of enrollment information:

1. Current year in process enrollments at the top of the list. These are applications that have been started but not completed for the beneficiary for the current plan year.
2. Current year completed enrollments below the in-process enrollments. These are completed enrollment applications for the current plan year and may include information about riders, documents uploaded during enrollment and the ability to view the PDF of the application.
3. Past enrollment information is at the bottom. This includes plan name and other information if available to be displayed.



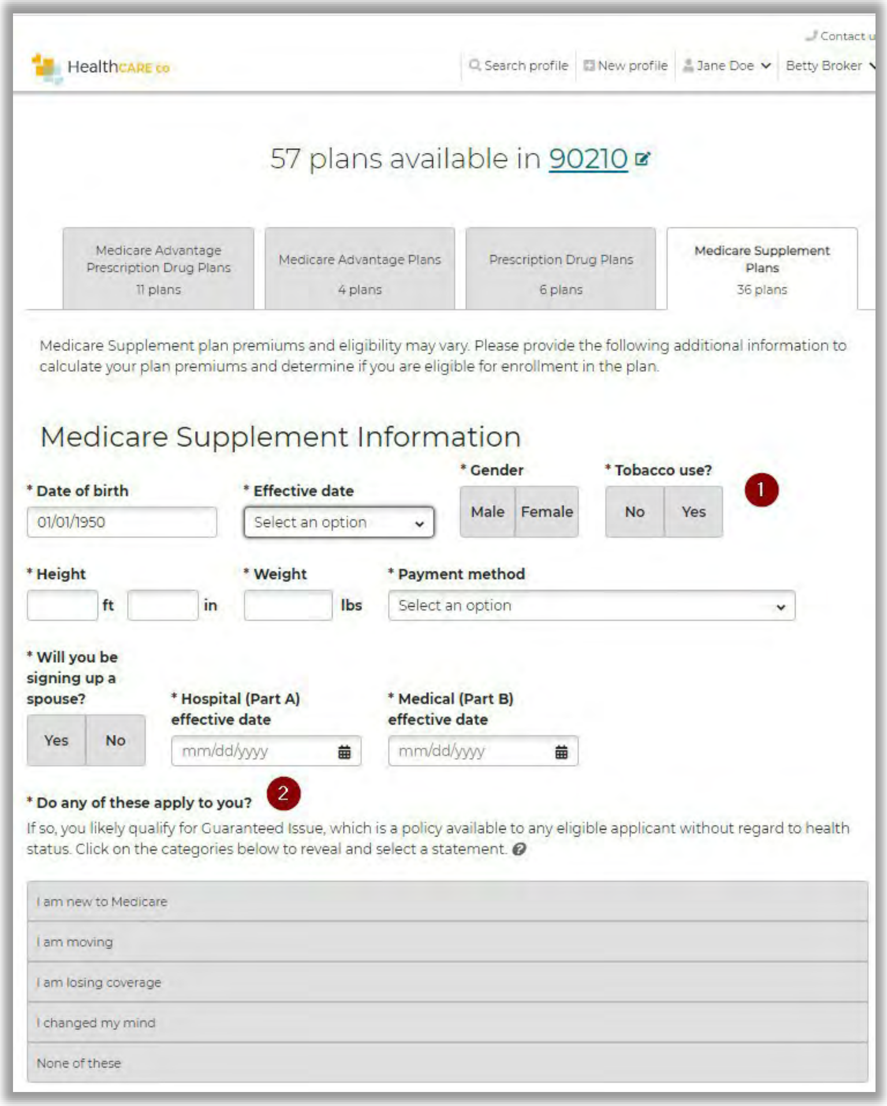
#	TASK	DETAILS
1	View enrollment information	The enrollment history information for this applicant includes the date and time of the application submission, the plan selected for enrollment, and the confirmation number. Agents will also see rider information, documents uploaded during enrollment and the total monthly premium.
2	View the enrollment form	To view a PDF version of the completed enrollment form, click *View application*.

Medicare Supplement

The Medicare Supplement plan tab will appear on the Plan List page if plans are available for the zip code of the beneficiary. If available, agents will be required to answer a series of rate factor questions for the beneficiary prior to viewing plans and rates.

Rate Factor Questions

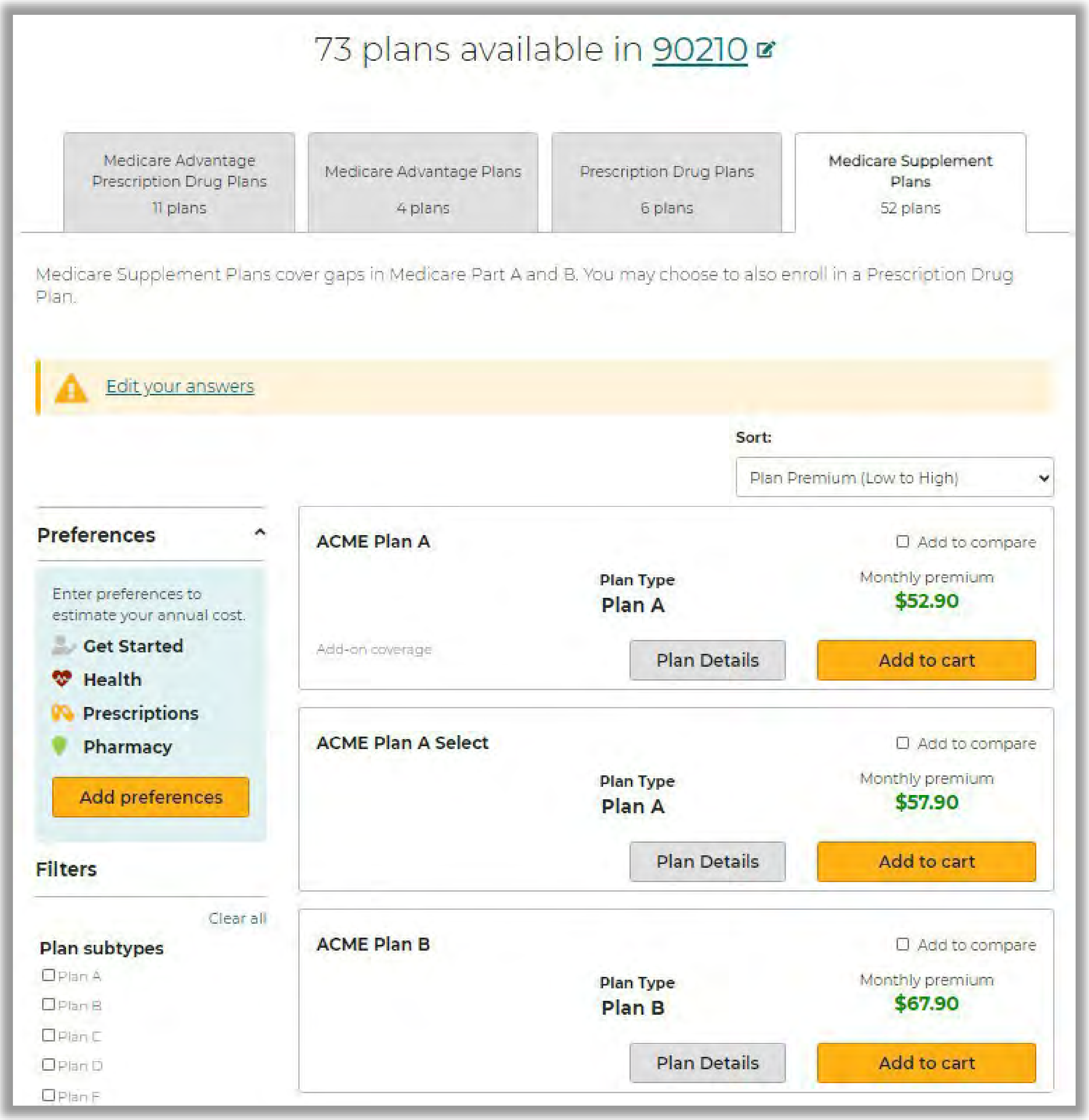
Rate factor questions vary by carrier. Rate factor questions displayed are dependent on the plan selected and its service area. All questions in the sample image provided may not display for all plans, only the applicable questions for the plan selected will display. All questions displayed are required.



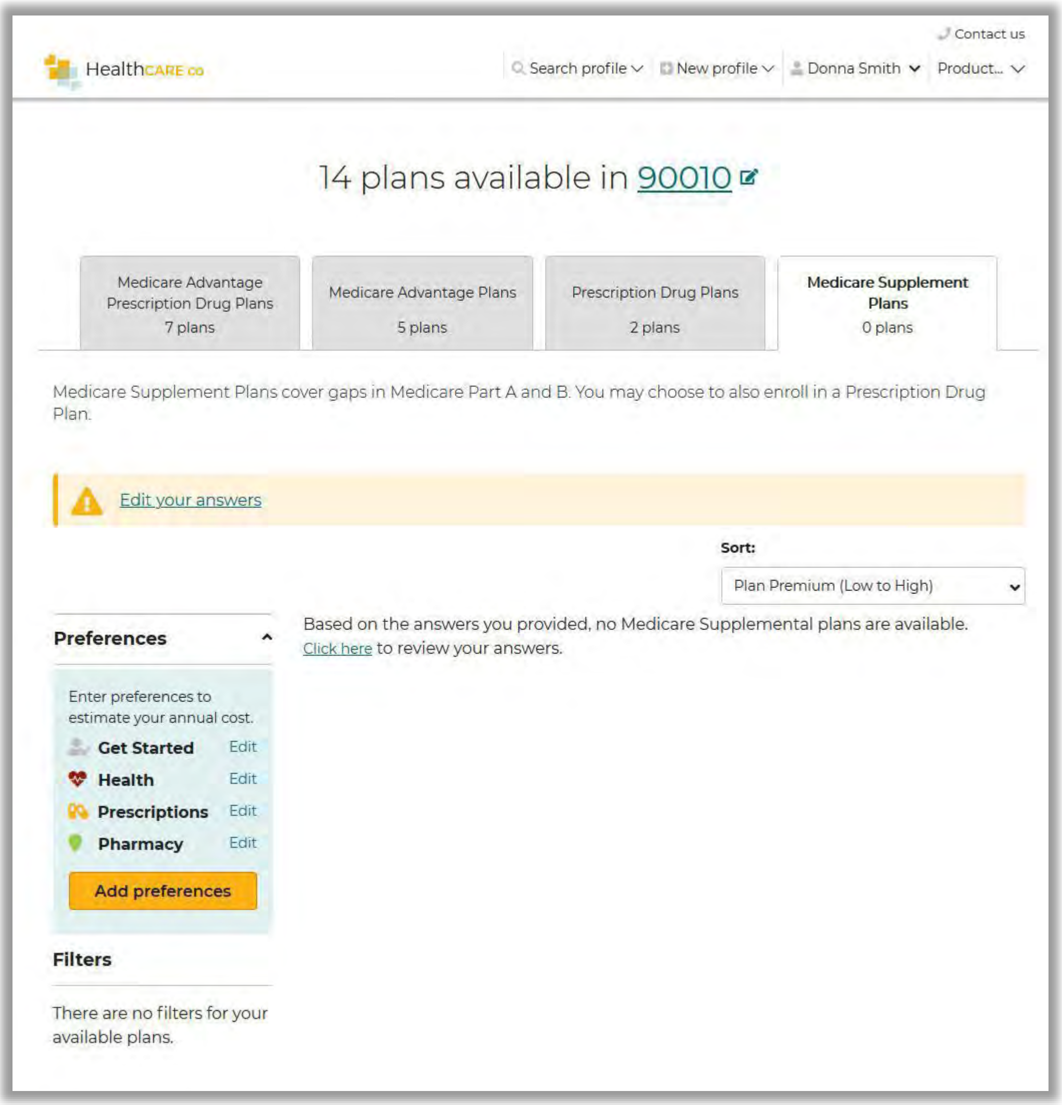
#	TASK	DETAILS
1	Rate factor questions	Answer all questions presented regarding the beneficiary.
2	Guarantee issue reasons	Select a reason from this area. Clicking on the category to reveal reasons associated with the category. Select the most appropriate reason for guarantee issue.

Plan List

After all rate factor questions have been answered and agent clicked the *Continue to plans* button, available plans and premiums will be presented. Select *Edit your answers* in the banner above the plans to go back to the rate factor questions.



There may be an occasion when, based on the answers provided to the rate factor questions, no plans are available. When this occurs, a message will appear where plans are normally located. Again, select *Edit your answers* to return to the rate factor questions.

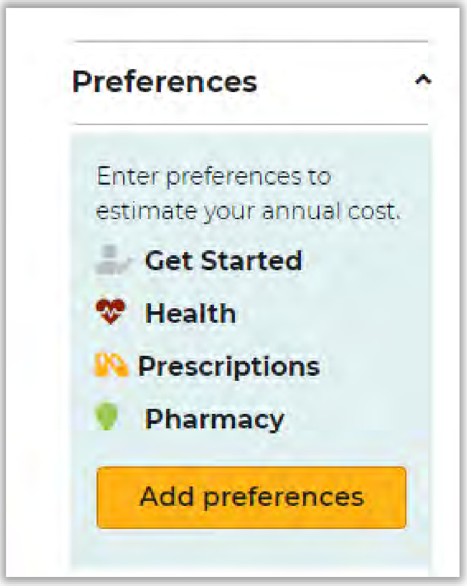


Add Preferences / Guided Help

Agents can enter preference information specific to the beneficiary to help select their best fit plan. Entering information in the guided help workflow will help generate accurate total estimated costs per plan for the beneficiary.

Agents can access the guided help workflow from:

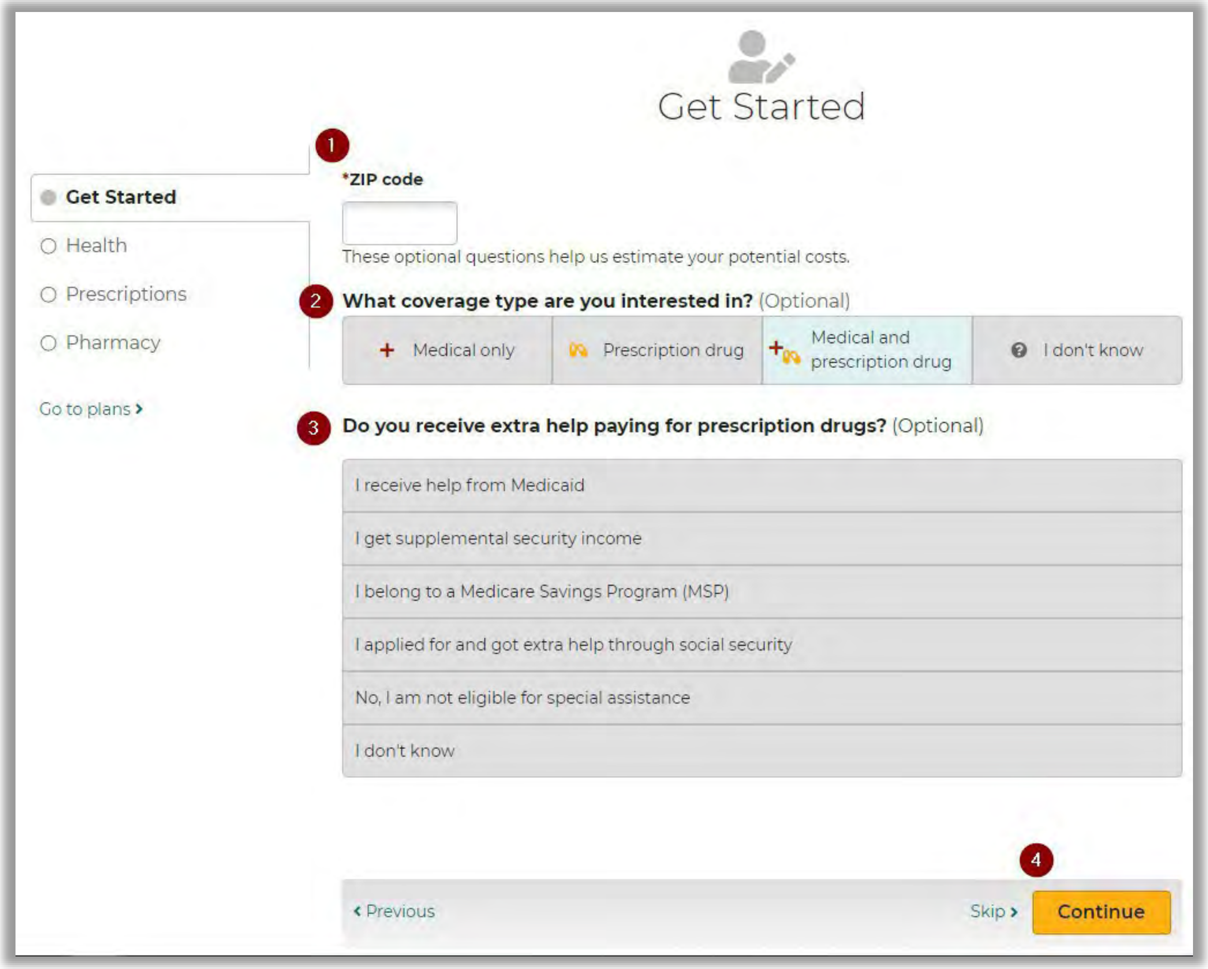
1. The beneficiary dropdown menu in the global header and clicking *Preferences*
2. Any beneficiary profile page by clicking *Go to preferences* in the action bar at the bottom of the page.
3. The Plan List page for the beneficiary by clicking *Add preferences* button in the left sidebar above the filters.



Get Started

On the Get Started page, agents can provide the beneficiary's zip code, select the interested coverage type and subsidy. This allows agents to indicate whether the beneficiary receives a Low-Income Subsidy. The Low-Income Subsidy, also known as "Extra Help," is available for eligible beneficiaries whose income and resources are limited. This subsidy aids with prescription drug plan costs, including the premium, deductible, and copayments. Qualifying for this subsidy impacts plan pricing. Providing the beneficiary's subsidy information allows the system to adjust premiums, drug deductible and drug copays in the plan cost estimates.

While working with a beneficiary profile, agents can access this page by selecting the *Preferences* in the dropdown menu or clicking *Go to preferences* in the Profile page action bar.

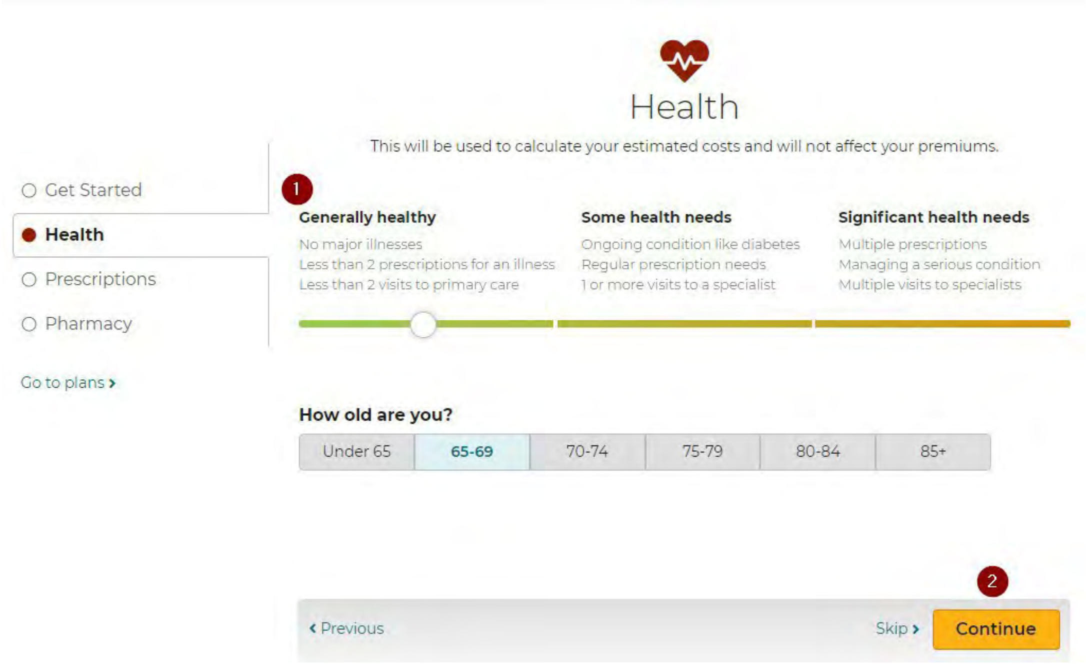


#	TASK	DETAILS
1	Provide location information	Enter the beneficiary's zip code to determine available plans. This will prepopulate from the beneficiary's profile and updates made to the zip code here will save to the profile.
2	Select interested coverage type	Select which coverage type the beneficiary is interested in and what they are shopping for. The choice made here will control which plan type tab you land on when reaching the available plan list page. Agents will still be able to select other tabs to see other plan types on the available plan list page. The choice also impacts the dynamic workflow; for example, if the beneficiary is only interested in Prescription drug, then the workflow will skip the Health page. Agents can still choose to navigate to the Health page using the left bar navigation.
3	Select subsidy eligibility	Select an option to indicate the level of assistance the beneficiary qualifies for.
4	Continue to the next step	Information is automatically saved as soon as it is entered on the page. Click *Continue* to navigate to the next part of the preferences workflow or navigate using the menu on the left side of the page. Agents can also click *Previous* to go to the previous page they were on, *Skip* to skip this page (information is saved) or *Go to plans* to go directly to the plan list.

Health Information

Entering information about the beneficiary's location, age range, and health provides a list of available plans and calculate estimated out-of-pocket medical expenses. The age and health information agents provide does not affect the plan premium or the beneficiary's eligibility for Medicare plans.

The Health Information page allows agents to provide age range and health information for a beneficiary. While working with a beneficiary profile, agents can access this page by selecting the *Health* option in the dropdown menu or clicking *Go to preferences* in the Profile page action bar.

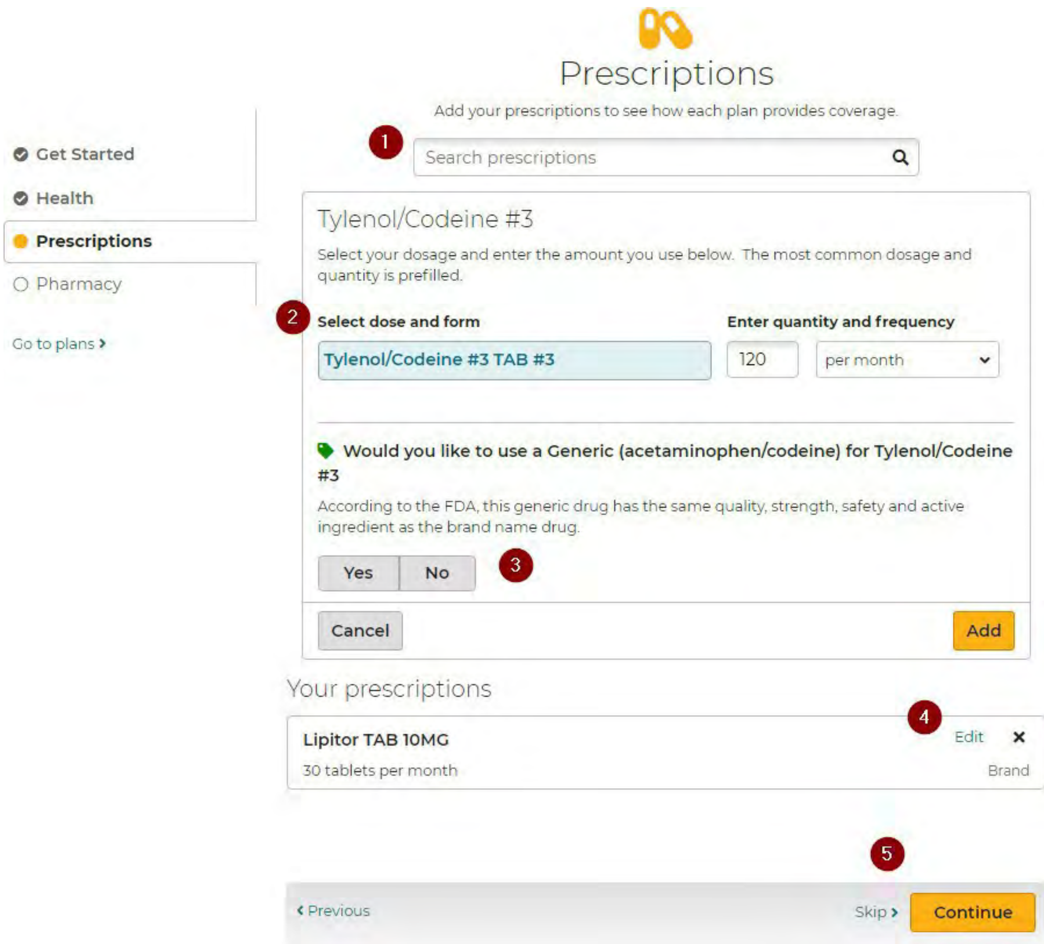


#	TASK	DETAILS
1	Provide health information	Answer the questions on this page to provide information about the beneficiary's age range and health.
2	Continue to the next step	Information is automatically saved as soon as it is entered on the page. Click *Continue* to navigate to the next part of the preferences workflow or navigate using the menu on the left side of the page. Agents can also click *Previous* to go to the previous page they were on, *Skip* to skip this page (information is saved) or *Go to plans* to go directly to the plan list.

Prescriptions

The Prescriptions page allows agents to enter the beneficiary's prescription drugs. If the beneficiary is not interested in plans with drug coverage or does not want to provide their prescription drugs at this time, agents can select a different page or skip to the next step. It is recommended that the beneficiary provide prescription drug information, as this allows agents and the beneficiary to understand if and how their drugs are covered by each plan and to provide a better out of pocket cost estimate.

While working with a beneficiary profile, agents can access this page by selecting the *Prescriptions* option in the dropdown menu or clicking *Go to preferences* in the Profile page action bar.

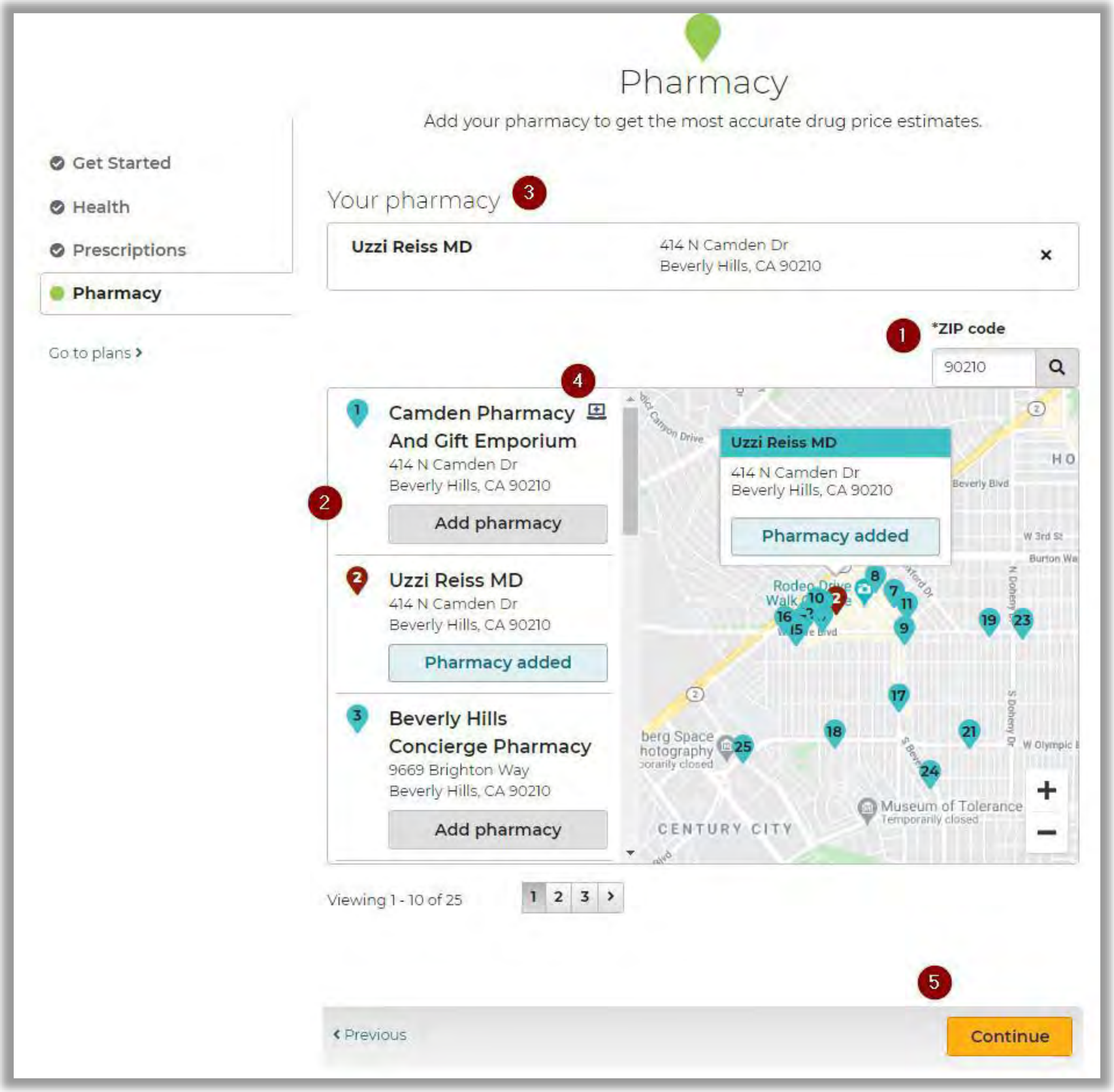


#	TASK	DETAILS
1	Find a drug	To find a drug, enter the first few letters in the search field. Use the drop-down search results list to select the drug.
2	Add a drug	After finding and selecting a drug, additional fields appear, where agents can enter dosage, form, frequency, and quantity information. The most common values will be selected by default. When finished, click *Add*. The drug is added to the Medicine Cabinet and saved to the Profile.
3	Choose Direct Generic	Switch to the direct generic form of the drug by clicking the button provided.
4	Manage the Drug List	To edit the drugs that are on the Medicine Cabinet, agents can change the following: - Change the drug dosage by clicking Edit - Remove the drug by clicking the X.
5	Continue to the next step	Information is automatically saved as soon as it is entered on the page. Click *Continue* to navigate to the next part of the preferences workflow or navigate using the menu on the left side of the page. Agents can also click *Previous* to go to the previous page they were on, *Skip* to skip this page (information is saved) or *Go to plans* to go directly to the plan list.

Pharmacy

The Pharmacy page allows agents to enter the pharmacy where the beneficiary fills prescriptions, so the system can provide more accurate drug pricing. Entering a pharmacy is optional, and agents can skip this page.

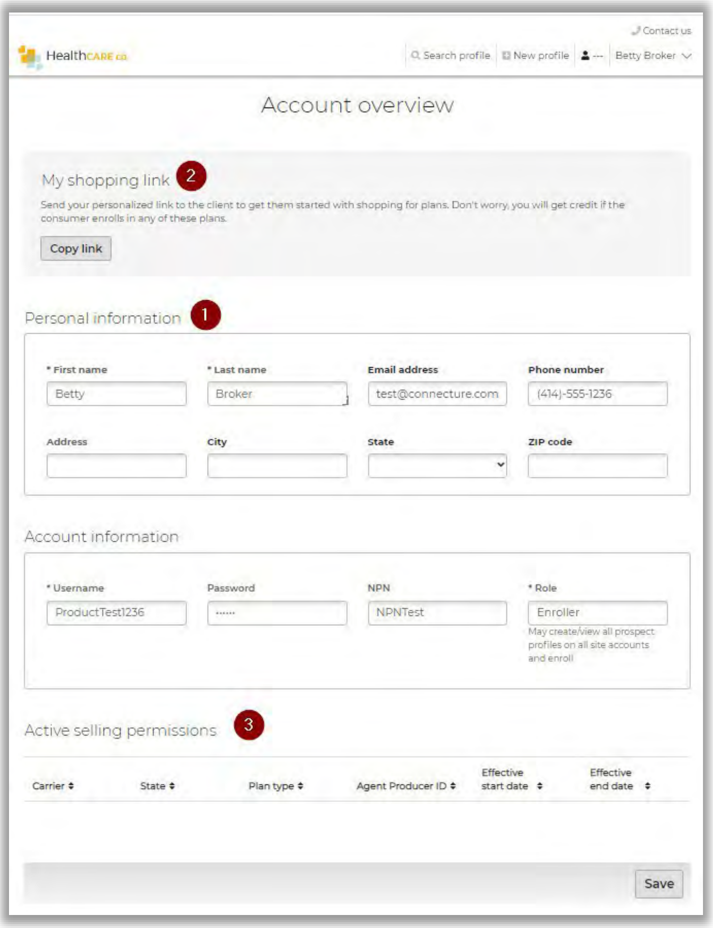
While working with a beneficiary profile, agents can access this page by selecting the *Pharmacy* option in the dropdown menu or clicking *Go to preferences* in the Profile page action bar.



#	TASK	DETAILS
1	Select pharmacy area	If the agent entered a ZIP code on Get Started page or when creating the profile, a list of pharmacies for that ZIP appears. If the agent did not enter a ZIP or wants to search for a pharmacy in a different area, enter a ZIP code. Zoom in or out on the map and click to drag the map area.
2	Select a pharmacy	The pharmacies are listed in proximity order to the location entered. To select the beneficiary's pharmacy, click the *Add Pharmacy* button in the list or by clicking on a pin on the map and selecting *Add Pharmacy* there. The selected pharmacy icon changes color and now says "Pharmacy added" to indicate it is selected. The select pharmacy details display above the map. It can be removed by clicking the X.
3	Selected pharmacy	The selected pharmacy displays at the top of the page. The list also shows "Pharmacy added" for the selected pharmacy.
4	e-prescribing	Any pharmacies with the e-prescribing icon support e-prescribing.
5	Continue to the next step	Information is automatically saved as soon as it is entered on the page. Click *Continue* to navigate to the next part of the preferences workflow or navigate using the menu on the left side of the page. Agents can also click *Previous* to go to the previous page they were on or *Go to plans* to go directly to the plan list.

Agent Account Overview

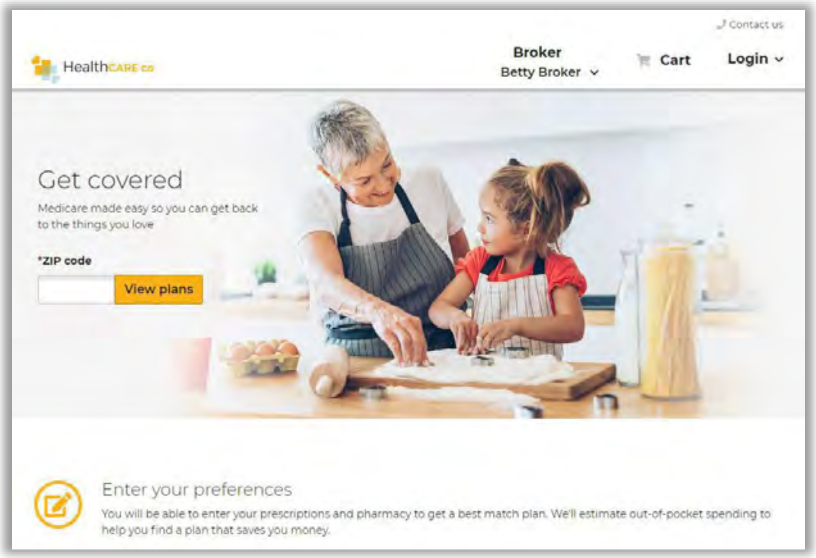
The Account Overview page allows agents to view and manage their information in the system, as well as access their personalized shopping link. This page can be accessed by clicking the agent's name in the top right navigation bar and selecting *Account Overview* from the menu.



#	TASK	DETAILS
1	View and edit account information	Account information displays on this page. Site administrator determines the fields agents may edit. After editing, click the *Save* button at the bottom of the page to save changes. If agents need to change any other personal information in this section, contact your site administrator.
2	Access Shopping Link (Personalized URL)	Agent information is included in this link, so agents receive credit for any enrollments completed by the beneficiary who use this link. To provide this link to a beneficiary, copy the URL by clicking the *Copy link* button. Then, agents can paste this URL into, for example, an email.
3	Agent Selling Permissions	Customers have the option to display an agent's selling permissions assigned to them. When available, this will be located at the bottom of the page. It will display each carrier, state, and plan type the agent has permission to sell along with agent ID and start and end effective dates.

Shopping Link (Personalized URL)

Agents can copy their personalized shopping link and share with a beneficiary. When the beneficiary opens the site from the link, they will see the agent's information in the header of every page (see image). If a beneficiary creates an account, agents will be able to search for the profile and see any updates made by the beneficiary, such as prescriptions added to the Medicine Cabinet. Agents will receive credit for all enrollments completed on their personal links. If you have an existing PURL (http://FirstNameLastName.medicaplanchoices.com), it will be linked to this new PURL page and can continue to be used as is.



If the agent sent their Shopping Link to a beneficiary and the beneficiary enrolled in a plan, the agent will receive an email notifying them of the enrollment. To receive this notification, the agent must have a valid email address in their account.