connexion
INSURANCE SOLUTIONS

Professional PlanCompare

User Guide

Medicare Solution

Plan Year 2020

About Connecture

Connecture offers the most widely-adopted Medicare shopping and enrollment solution, providing millions of consumers every year with a simple digital experience for finding their best-fit plans. With unique drug-pricing capabilities, Connecture arms consumers with reliable and time-tested out-of-pocket cost estimates to support better decision-making. Connecture's multi-channel automation saves consumers, carriers, brokers and call centers time navigating Medicare complexities, improving member satisfaction and retention.

Connecture has been delivering compliant solutions for 20 years. Supporting 9 of the 10 top U.S. health insurance carriers, more than 30 national and regional FMOs, and with nearly 4,300 plans on our platform, Connecture processes 715,000 plus Medicare enrollments every year. Our regular consumer market surveys from more than 10,000 respondents affords unique insights on consumer shopping and enrollment behavior, driving innovation in research and development.

Connecture offers rapid software implementation, ongoing training and exceptional support in order to help clients drive value from their investment. Contact Connecture at connecture.com and marketing@connecture.com.

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Introduction

Professional PlanCompare (PPC) is the decision support solution that empowers Brokers and other Agents to make personalized Medicare plan recommendations for Medicare beneficiaries. Agents can use PPC to match beneficiaries with available plans based on individual healthcare and prescription drug needs and estimated out-of-pocket expenses.

After a beneficiary chooses a plan, PPC can be used to assist the beneficiary with enrollment. Beneficiaries can also self-enroll using the consumer PlanCompare site.

> **IMPORTANT:** While this user guide explains how to use all features, each company's rules, regulations, and site configurations may vary. All Agents should use this site only as directed by their company.

PPC provides the following benefits:

- 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.
- Call center **scripts** that ensure Call Center Representatives are meeting CMS guidelines and engaging beneficiaries in a courteous and consistent manner.
- **Drug- and pharmacy-finding tools** that allow Agents to determine the beneficiary's plan coverage needs and potentially save money by finding direct generics for brand name medications.
- A streamlined **shopping experience** for viewing, comparing, and emailing plan details.

Altogether, these tools enable Agents to recommend the lowest-cost plan that provides the greatest benefit to the beneficiary.

About This Guide

This guide describes the features available in Professional PlanCompare (PPC).

This guide explains the base workflows available based on the default configuration of the product. Depending on the configurations your site administrator has chosen for your specific site, the actual features you see may vary from what is depicted in this guide.

Audience

This user guide is intended primarily for Brokers and Call Center Representatives who use PPC to assist beneficiaries with finding and/or enrolling in Medicare plans. These users are referred to collectively in this documentation as *Agents*.

The workflows described in this user guide are also available to Agent Administrators who manage a team of Agents. For more information about the functions available to each type of user, see **"Permissions" section**.

About Beneficiaries

A Medicare beneficiary is an individual who is determined by the Social Security Administration to be eligible for a Medicare plan. The term *beneficiary* is used throughout the product and this documentation to describe the individuals who are in the process of shopping and enrolling in a Medicare plan, as well as the members who are already enrolled in a Medicare plan.

High-Level Process Flow

The following process flow diagram depicts the workflows available in Professional PlanCompare (PPC). Each colored box represents a workflow that is described in a later section of this documentation.

Process Flow Diagram
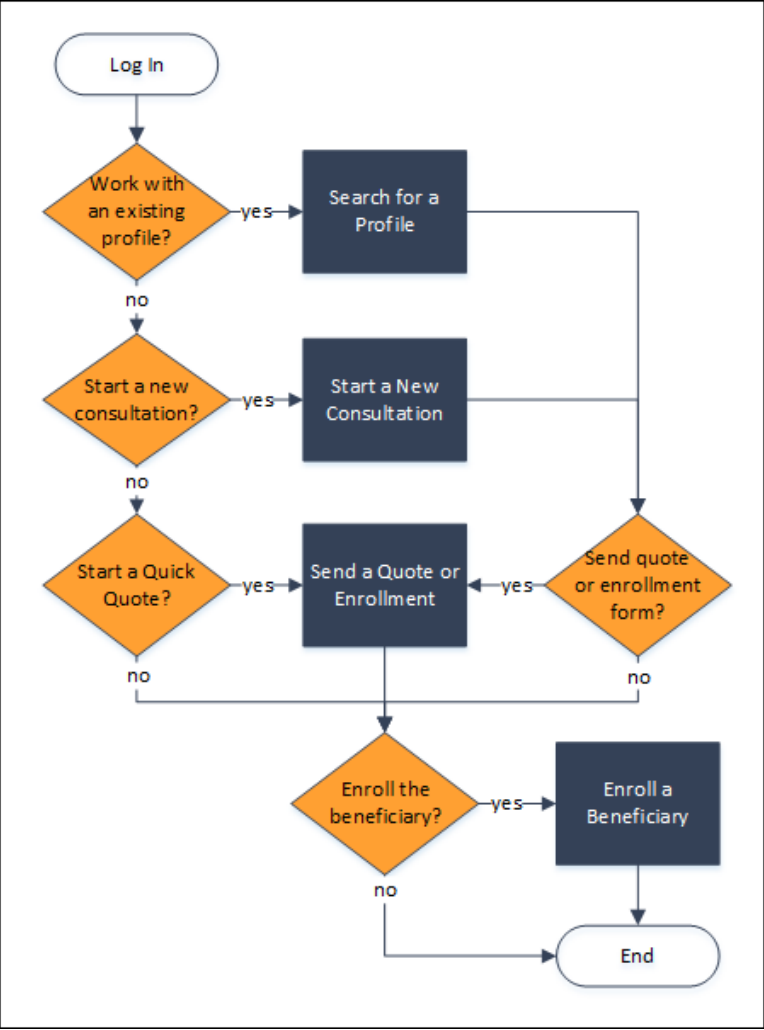
Login Page

On the login page, you can log in to the PPC site or reset a forgotten password.

Example Screenshot(s)

Task Table

#	TASK	DETAILS
1	Log in	To enter PPC, enter your **Username** and **Password**, and click **Login**.
2	Reset a password	If you forgot your password, you can reset it by clicking **Forgot Password**. This link opens the Reset Password page. See **"Reset Password Pages" on the next page**.

Reset Password Pages

If you forget your password to log in to PPC, you can use the Reset Password pages to set a new password. You can access the first Reset Password page from the **Forgot Password** link on the Login page.

Example Screenshot(s)

First Reset Password Page

Password Recovery Email

Second Reset Password Page

Task Table

#	TASK	DETAILS
1	Send a password recovery email	On the first Reset Password page, enter the **Username** for your account, and click **Reset Password**. The system sends an email to the email account associated with your username.
2	Click the password reset link	To reset your password, click the link in the password recovery email. This link takes you to the second Reset Password page.
3	Select a new password	On the second Reset Password page, enter your new password. It is recommended that your password contain letters and at least one number. Your password may not contain any of the following characters: & < > ' " % + Confirm your new password by entering it again. The password you enter in both fields must match. Click **Next**. If the password reset was successful, the Password Reset Completed page appears, and your new password is effective immediately. You are redirected to the Login page, where you can enter your new password to log in.

User Interface and Navigation

PPC provides a clean, intuitive layout that allows Agents to quickly and easily access the pages and functions needed to perform tasks. The universal navigation features described in this section are available on multiple pages throughout the system.

"Start Over" Buttons

| VIEW DASHBOARD | SEARCH PROFILES | START CONSULTATION | START NEW ENROLLMENT | SEND QUICK QUOTE |

The "Start Over" buttons at the top of each page allow you to begin a new process for a new beneficiary at any time. Clicking one of these buttons refreshes your session and brings you to a fresh page with no beneficiary profile selected.

> **IMPORTANT:** If you are already working with a beneficiary profile or are in the middle of another process when you click a Start Over button, any unsaved information on your current page is lost.

The buttons you see may vary based on the site you are using. For example, your site may have been configured to remove certain buttons.

The following Start Over buttons are available by default.

View Dashboard – Professional PlanCompare users can click this button to access the Dashboard page. The Dashboard page is a convenient central management tool that allows you to view enrollment statistics in graphical report form, as well as manage all of your tasks. See **"Dashboard Page" section**.

Search Profiles – Click this button to access the Search Your Profiles & Enrollments page, where you can search for an existing beneficiary profile in the system. If a beneficiary profile exists for the current plan year, this is how you can access the beneficiary's saved information, included any consultations and enrollments in progress. See **"Search for a Profile" section**.

Start Consultation – Click this button to begin a new consultation for a beneficiary who does not have a profile or has not started an enrollment for the current plan year. If the beneficiary is interested in shopping for a new plan, the consultation workflow guides you through the complete process of creating a profile and gathering the information that allows the system to recommend a plan and calculate estimated costs. Then you can compare plans, send a quote, and assist the beneficiary in completing enrollment. See **"Start a Consultation" section**.

Start New Enrollment – Click this button to begin enrollment for a beneficiary who knows which plan to enroll in. For beneficiaries who do not need or want to provide personal health and drug information so that you can recommend a plan, you can skip the consultation workflow and use this button to quickly select a plan and start the enrollment process. See **"Enroll a Beneficiary" section**.

Send Quick Quote – Professional PlanCompare users can click this button to quickly create a quote for a beneficiary who does not have a profile in the system. This is useful if a beneficiary contacts you for a plan quote but does not want to provide personal information for a complete consultation. See **"Send a Quote or Enrollment" section**.

Tooltips

Throughout the site, question mark icons appear next to fields. Hovering your mouse over the icon displays a *tooltip*, which offers more information about the question or data you are viewing.

Page Footer

On the bottom of each page, the footer contains links that allow you to view additional information and access additional pages.

RESOURCES

Drug and Pharmacy Finder
Consumer PlanCompare Site

ADMINISTRATION

Agent Account Management
Enrollment Status and Opportunities

Resources

This section is configured by your site administrator. These links vary by site but may include the following:

- Drug and Pharmacy Finder
- Consumer PlanCompare Site
- Training Documentation
- Eligibility Guides
- Subsidy Information

Administration

Agent Administrator users can access the following:

- Agent Account Management
- Enrollment Status and Opportunities report

Beneficiary Information

This section is dynamic based on the information saved for the beneficiary you are currently working with. You can use these links to quickly change any of the following beneficiary information:

- Zip Code
- Health Information
- Prescription Drug List
- Preferred Pharmacy

Profile Tabs

During the consultation process or while you are working with a beneficiary profile, tabs appear at the top of each page. Each tab represents a page where you can enter or edit the beneficiary's relevant health and prescription drug information. The shading of these tabs allows you to visually identify the selected tab and quickly determine where you are in the workflow.

PROFILE	SOA	HEALTH	SUBSIDY	DRUGS	PHARMACY	COMPARE PLANS

You can use the buttons at the bottom of each page to progress through the tabs in the recommended order. You can also select a tab to skip ahead or return to a previous step, keeping in mind that you must click **Continue** to save any information entered on a page.

Call Center Scripts

If you are a Call Center Representative, your site administrator may have configured scripts to appear on various pages throughout the system. These scripts contain prompts to guide you through the process of working with a beneficiary on a particular page.

For example, if a beneficiary calls and wants to find a plan that covers a particular drug, you can use the call center script on the Add Drugs page to obtain prescription drug information. Scripts may be configured to include the caller's name and ZIP code when you are working with a beneficiary who has this information saved in a profile.

PROFILE	SOA	HEALTH	SUBSIDY	DRUGS	PHARMACY	COMPARE PLANS

If you did not find a matching profile: "What is the first and last name as shown on your Medicare card?" "To identify available plans in your area, what is the ZIP code of your primary residence?" In all cases, collect or verify required information (e.g., ZIP code, phone number).

Calculator   Add Notes/Task to an active profile

PROFILE

Profile Quick Links

During the consultation process or while you are working with a beneficiary profile, you may need to quickly calculate values, record miscellaneous information, or add tasks to remind yourself to do something. For Professional PlanCompare users, two quick links appear at the top of each profile page.

PROFILE	SOA	HEALTH	SUBSIDY	DRUGS	PHARMACY	COMPARE PLANS

Calculator 🔲   Add Notes/Task to an active profile ☑

Calculator

The **Calculator** link allows you to quickly calculate values, for example, the beneficiary's age, plan price differences, and percentages. You can operate the calculator with either your mouse or your keyboard.

Notes and Tasks

The **Add Notes/Tasks** icon opens a window where you can quickly create notes and tasks to associate with the active profile. Once saved, you can view the notes and tasks associated with a beneficiary in the beneficiary's profile history. You can also view all notes and tasks for all beneficiaries on the Dashboard.

NOTES

Notes allow you to track miscellaneous information about the beneficiary. Some actions you perform in the system generate notes automatically. For example, making changes to a beneficiary's address automatically creates a note documenting the old address and the new address.
Additionally, you can manually add notes to keep track of information you gather as you work with a beneficiary. For example, you may want to add notes for the following:

- Preferred nickname
- Personal information such as names of spouse, grandchildren and pets
- Current plan name, premium and costs
- Primary interest in a plan such as lower premiums
- Any concerns or unanswered questions requiring follow-up

You can enter any note, up to 450 characters.

TASKS

Tasks allow you to set reminders to perform actions to assist the beneficiary. You can select a default due date, such as **Next Day** or **5 Days**, or set a custom date. The due date determines where the task appears on your task list. For example, you 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

You can enter any task description, up to 450 characters.

Dashboard Page

Agents using Professional PlanCompare can use the Dashboard page as a central location for tracking the progress of enrollments, profiles, and tasks.

The Dashboard page appears when you first log in to the system and acts as a start page for all the tasks you perform. You can also access this page by clicking the **Dashboard** button from any page in the system.

Example Screenshot(s)

Reports Tab
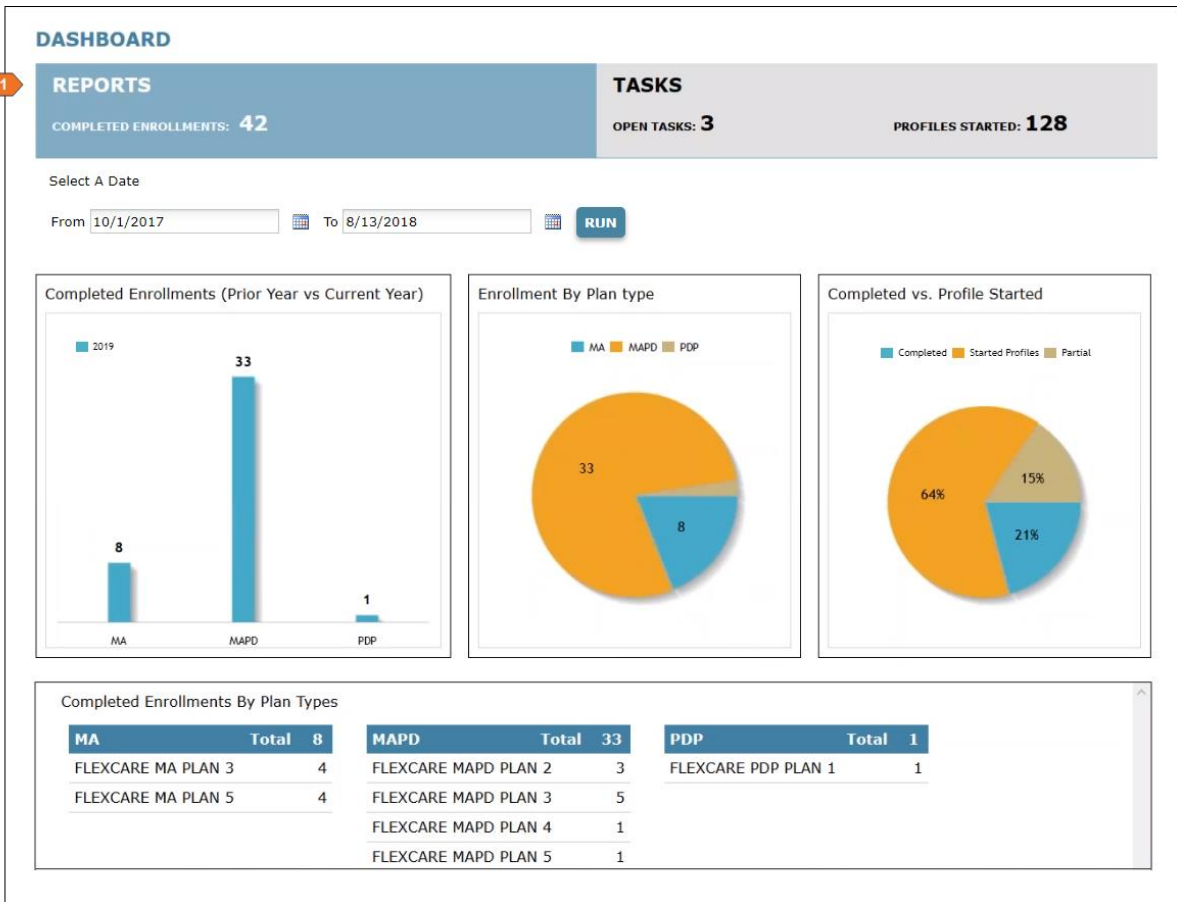
Tasks Tab

VIEW DASHBOARD   SEARCH PROFILES   START CONSULTATION   START NEW ENROLLMENT   SEND QUICK QUOTE

DASHBOARD

REPORTS		TASKS	
COMPLETED ENROLLMENTS: **42**		OPEN TASKS: **3**	PROFILES STARTED: **128**

Click to Hide/Show Task List Report

Filter by: Incomplete ∨

TASK LIST REPORT

Agent Name	Agent ID	Beneficary Name	Task Details	Created	Schedule Date	Days Past Due	Completed Date	Check if Completed
Amanda Woodman	amanda.demo	June Bahia	Update June's medicine cabinet with new drug	03/17/17 8:28 AM	03/18/17 12:00 AM	277		☐
Amanda Woodman	amanda.demo	Jim Smith	Follow up with Joe after the SOA is submitted	03/17/17 8:06 AM	03/20/17 12:00 AM	275		☐
Amanada Demo	amanda.demo	Amanda Woodman	Finish enrollment form	10/12/17 8:55 AM	10/13/17 12:00 AM	68		☐

Task Table

#	TASK	DETAILS
1	View reports	To view enrollment information in graphical form, select the Reports tab. The Reports tab displays statistics that are updated daily during the data sync each night. The following terms are used in the charts to track the progress of enrolling beneficiaries: • **Started Profile** – A profile has been created for a Medicare beneficiary, but enrollment has not been started. The beneficiary is still a prospect. • **Partial** – A profile has been created for a Medicare beneficiary, and enrollment has been started. However, enrollment has not been completed. This includes both enrollments that were started by you (the Agent) and enrollments that were started by the beneficiary on the consumer PlanCompare site after you sent a quote through the system. This number helps you identify who may need assistance completing enrollment. • **Completed** – A profile has been created for a Medicare beneficiary, and enrollment has been completed. This includes both enrollments that were completed by you (the Agent) and enrollments that were completed by the beneficiary on the consumer PlanCompare website after you sent a quote through the system. **TIP:** By default, reports include information from the start of the Annual Election Period (AEP) to the current date; however, you can select different date range parameters to update the chart information accordingly.
2	View tasks	To view your tasks, select the Tasks tab. By default, the Tasks tab displays your open, scheduled tasks, organized by due date. You can filter this list to display all tasks or only completed tasks. **NOTE:** Agent Administrator users can view all tasks for the Agents they manage. Each task contains a link to the associated beneficiary profile. From the Tasks tab, you can complete the following actions: • View the associated beneficiary's profile by clicking the beneficiary's name. Complete and incomplete tasks also appear on the beneficiary's Update Profile page, along with any notes you have recorded for that profile. • Complete a task and remove the task from the incomplete tasks list by checking the **Check If Completed** box.

My Account Page

The My Account page allows you to view and manage your information in the system, as well as access your personal shopping URL.

You can access this page from any page in the system by clicking the **My Account** link on the top navigation bar.

Example Screenshot(s)

Your LOGO HERE

MY ACCOUNT

AGENT INFORMATION

First Name:

Last Name:

Telephone: (   )   -

Email: test@connecture.com

ACCOUNT INFORMATION

Username:

NPN:

SITE ACCESS

This user does NOT have access to this site.

GRANT ACCESS

YOUR MARKETING SHOPPING LINK

Send your personalized link to your clients. Be sure to use the COPY button to copy the link below.

You will get credited if your client enrolls in any of the plans you are authorized to sell.

URL TO LINK TO

https://mcproductdefault-ipc.destinationrx.com/plancompare/2020/consumer/type3/?agent=EAAAABCsAcQbsgAS4NaEcLe1SPub%

COPY

SAVE MY ACCOUNT INFO   CANCEL

- VIEW SELLING PERMISSIONS

Listed below are the active selling permissions for this agent

Carrier	State	Plan Type

No permissions found

Tips:

- The Status designation indicates whether an agent account is Active or Inactive across all DRX products. You are also able to grant or revoke access to a particular site.
- Username and password cannot contain special characters (e.g. &, <, >, ', ", %, +)
- Below is a summary of role options. DRX recommends that brokers only be given _Broker roles.

Role Name	View / Add / Edit Own Profiles	View / Add / Edit All Profiles	Enroll	View / Add / Edit All Agent Accounts
Quoter	Yes	Yes	No	No
Quoter_Broker	Yes	No	No	No
Quoter_Admin	Yes	Yes	No	Yes
Enroller	Yes	Yes	Yes	No
Enroller_Broker	Yes	No	Yes	No
Enroller_Admin	Yes	Yes	Yes	Yes

Task Table

#	TASK	DETAILS
1	View and edit your account information	Your account information displays on this page. You can edit your telephone number and email address. If you need to change any other personal information in this section, contact your site administrator.

2	Access your personal shopping site URL	The URL that displays on this page is a direct link to your personal shopping site. Your agent information is included in this link, so you receive credit for any beneficiary enrollments completed through your personal shopping site.
		To provide this link to a beneficiary, copy the URL by clicking the **Copy** button. Then, you can paste this URL into an email. Use ONLY the **Copy** button.
		NOTE: Because of the length and complexity of your personal shopping site URL, it is recommended use meaningful link text, such as "the PlanCompare website," with the link's actual URL hidden.
3	Agent Selling Permissions	Multi-carrier clients have the option to display an agent's selling permissions (ASP/ALP) assign to them. When available, this will display each carrier, state and plan type the agent has permission to sell. This feature is also available in Agent Account Management.

Search for a Profile

If a beneficiary profile has been started (during shopping) or completed (during enrollment) for the current plan year, you can access the beneficiary's previously saved information in the system by searching for a profile.

Search Profiles & Enrollments Page

The Search Profiles & Enrollments page allows you to search for an existing beneficiary and view any saved profile information or enrollments in progress.

For users who do not have access to the Dashboard page, the Search Profiles & Enrollments page appears when you first log in to PPC. You can also access this page by clicking the **Search Profiles** Start Over button at the top of any page in the system.

Example Screenshot(s)

Task Table

#	TASK	DETAILS
1	Enter search criteria for a profile	To search for a specific profile, enter the beneficiary's information in the search parameters. You need to enter information in at least one field; however, entering more information will assist you in narrowing your search. **NOTE:** If you are searching by First Name and/or last name, you must enter at least three characters.
2	Enter search criteria for applications	To narrow your search results to include only the beneficiaries who started enrollment applications within a specific date range, you can enter start and end dates in the application search fields.
3	View search results	To find the beneficiary profiles that match the search parameters you entered, click **Search**. The search results table displays your results: ι Profiles in *Registrant* status indicate a beneficiary who has not started an SOA or enrollment application. ι Profiles in *Applicant* status indicate a beneficiary who has either started or completed an SOA or enrollment application.
4	Export your search results	You can export your search results to a .csv or txt. file. This is useful if, for example, you are searching for beneficiaries who began enrollment applications, and you want to export a list of beneficiaries to follow up with offline.
5	Access a beneficiary's profile history	To access a beneficiary's profile, click the name of the beneficiary. The Update Profile page opens. See **"Update Profile Page" on the next page**.
6	Access a beneficiary's enrollment history	To access the beneficiary's enrollment history, click **Enroll History**. The Applicant page opens. See **"Applicant Page" section**.

Update Profile Page

The Update Profile page allows you to view and edit information for an existing beneficiary profile. You can access this page by searching for a profile and clicking on the beneficiary's name.

Example Screenshot(s)

UPDATE PROFILE

Denotes a required field.

1 Beneficiary Information

* First Name   Amanda

* Last Name   Woodmaan

* Date of Birth   10/10/1952
                      Required Format:mm/dd/yyyy

* ZIP code   90210

Phone   (630) 890 - 2345

Email Address

Address (Line 1)   123 Maple Lane

Address (Line 2)

City   Los Angeles

State   CALIFORNIA

Is the sales contact different from the beneficiary? ○ Yes ● No

2 SEND ACCESS TO CONSUMER SITE

< PREVIOUS   CONTINUE > **4**

Click to Hide/Show Task List Report

Filter by: Profile History

TASK LIST REPORT

3

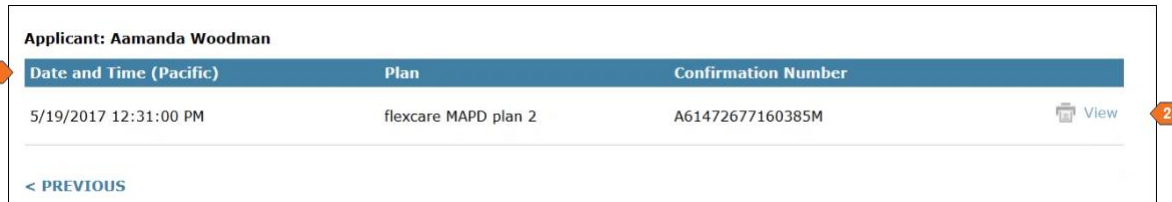| Agent Name	Agent ID	Task Details	Created	Schedule Date	Days Past Due	Completed Date	Check if Completed
Amanada Demo	amanda.demo	Changed FirstName from 'Amanda ' to 'Amanda' genderID from '0' to '2' homePhone from '' to '6308902345'	08/21/17 10:39 AM				
Amanada Demo	amanda.demo	Changed street1 from '' to '123 Maple Lane ' city from '' to 'Los Angeles ' state from ' ' to 'CA'	08/21/17 10:39 AM				
Amanada Demo	amanda.demo	Added planDescription = 'flexcare MAPD plan 6'	08/21/17 10:32 AM				
Amanada Demo	amanda.demo	Changed subsidy from '' to '4'	08/21/17 10:25 AM				
Amanada Demo	amanda.demo	Changed ageRangeID from '5' to '4' healthStatusID from '3' to '4' DateOfBirth from '1/1/1952 1:00:00 PM' to '1/1/1947 1:00:00 PM'	08/21/17 10:25 AM				
Amanada Demo	amanda.demo	Changed ageRangeID from '' to '5' healthStatusID from '' to '3' DateOfBirth from '' to '1/1/1952	08/21/17 10:23 AM				

Task Table

#	TASK	DETAILS
1	Edit beneficiary information	You can use the primary information fields to edit the beneficiary's personal information.
2	Send access to the consumer PlanCompare site	The consumer PlanCompare site allows beneficiaries to register a Consumer account and shop for their own plans. To provide access to this site, click **Send Access to Consumer Site**. When you click this button, two emails are sent to the beneficiary: 1. An email with a link to the consumer PlanCompare site. When the beneficiary uses this link to create an account on the consumer PlanCompare site, the site includes only the plans that you are licensed to sell. Your Agent ID is tracked in the link URL, so you receive credit for the sale if the beneficiary chooses to enroll. 2. A separate email with a unique authorization code that protects any PHI saved in the beneficiary's profile. The beneficiary must enter this authorization code to create an account on the consumer PlanCompare site. After creating an account, the beneficiary can shop for and enroll in a Medicare plan.
3	View profile history	The table on this page allows you to view the profile history for this beneficiary. Any action performed on this profile is dated and timestamped. Professional PlanCompare users can also view any notes and tasks associated with this profile. Use the drop-down menu to filter by the following: • All – Displays all notes, tasks and actions taken on the profile • Profile History – Displays actions taken on the profile • Notes – Displays the notes created for this profile • Tasks – Displays all the tasks associated with this profile • Complete – Displays only the completed tasks associated with this profile • Incomplete – Displays only the incomplete tasks associated with the profile
4	Work with the beneficiary	After you find and access an existing profile, you can edit the beneficiary's information, shop for plans, send a quote, or start enrollment. To proceed to the next step in the consultation workflow, click **Continue**. You can also use the tabs at the top of the page to navigate between pages. For more information about working with a beneficiary, see **"Start a Consultation" section.**

Applicant Page

The Applicant page allows you view an applicant's enrollment history. You can access this page by searching for a profile and clicking **Enroll History**.

Example Screenshot(s)

Applicant: Aamanda Woodman			
Date and Time (Pacific)	**Plan**	**Confirmation Number**	
5/19/2017 12:31:00 PM	flexcare MAPD plan 2	A61472677160385M	🖨 View

< PREVIOUS

Task Table

| #	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.
2	View the enrollment form	To view a PDF version of the completed enrollment form, click **View**.

Start a Consultation

In PPC, the consultation workflow guides you through the complete process of creating a new beneficiary profile; entering any health and prescription drug information that may be useful in matching the beneficiary to a plan; comparing available plans and estimated costs; providing a quote; and beginning enrollment.

Providing a consultation is useful if you are working with a beneficiary who wants a personalized plan recommendation based on specific health and prescription drug needs. After you use the guided workflow to enter relevant information, the system provides plan coverage details and cost estimates that are specific to the beneficiary. This empowers you to recommend the lowest-cost plan option for the beneficiary's coverage needs.

Workflow Diagram

The default consultation workflow includes the following steps and system pages. This workflow may vary depending on site configuration.
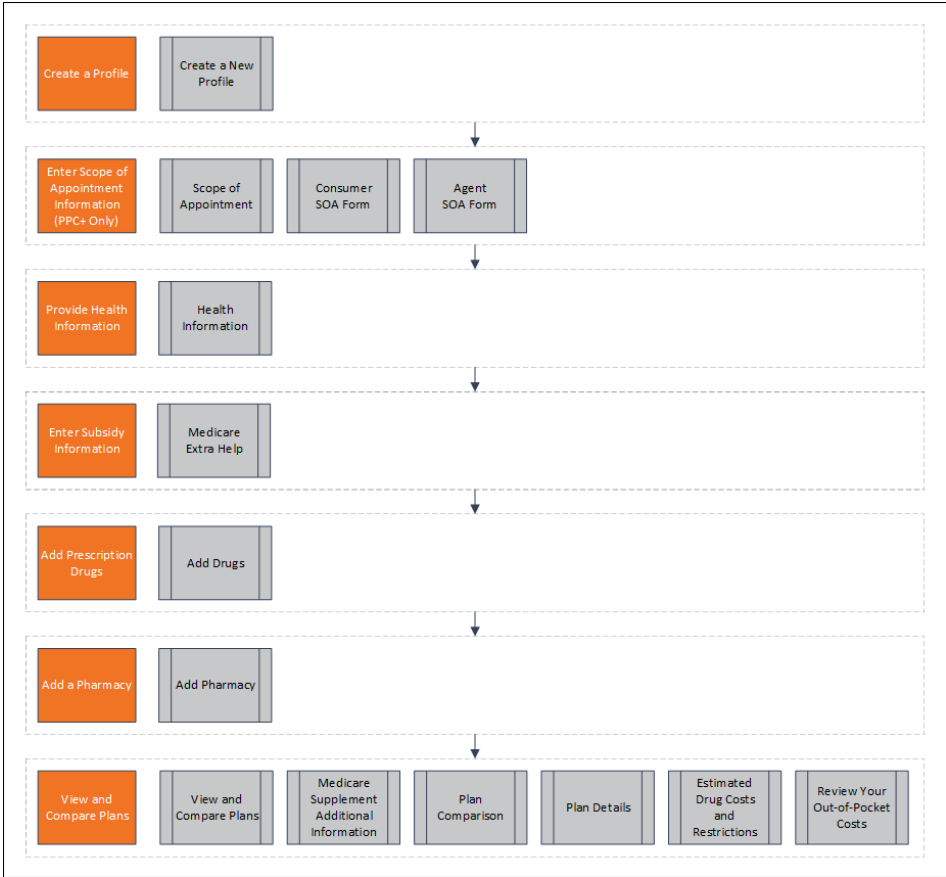
Create a Profile

The first step to start a consultation is to create a profile for the beneficiary. When you create a profile, the beneficiary's information is saved on this site. You can access this information again in the future by searching for the profile.

NOTE: You can also start or resume a consultation from the Update Profile page if the beneficiary already has a profile in the system. See **"Search for a Profile" section.**.

Create a New Profile Page

The Create a New Profile page allows you to start a consultation by creating a new beneficiary profile.

You can access this page from anywhere in the system by clicking the **Start Consultation** button.

Example Screenshot(s)

Task Table

#	TASK	DETAILS
1	Enter beneficiary information	Enter the beneficiary's personal information. The required fields are marked with an asterisk (*). Any profile information that you enter on this page can be edited in the future when you work with a saved profile.
2	Send access to the consumer PlanCompare site	The consumer PlanCompare site allows beneficiaries to register a Consumer account and shop for their own plans. To provide access to this site, click **Send Access to Consumer Site**. When you click this button, two emails are sent to the beneficiary: 1. An email with a link to the consumer PlanCompare site. When the beneficiary uses this link to create an account on the consumer PlanCompare site, the site includes only the plans that you are licensed to sell. Your Agent ID is tracked in the link URL, so you receive credit for the sale if the beneficiary chooses to enroll. 2. A separate email with a unique authorization code that protects any PHI saved in the beneficiary's profile. The beneficiary must enter this authorization code to create an account on the consumer PlanCompare site. After creating an account, the beneficiary can shop for and enroll in a Medicare plan.
3	Continue to the next step	To create the profile and continue to the next step, click **Continue**.

Enter Scope of Appointment Information

According to Centers for Medicare and Medicaid Services (CMS) regulations, Agents are required to obtain Scope of Appointment (SOA) information prior to any appointment in which Medicare marketing information will be discussed with a beneficiary or beneficiary representative. The beneficiary defines the scope of the appointment by indicating which plan types he or she is interested in discussing, which ensures that Agents do not attempt to sell a product that the beneficiary has not already expressed interest in.

Professional PlanCompare provides a Scope of Appointment page that allows you to obtain and manage SOA information for an appointment in the system. This includes an electronic SOA form that you can email or print and mail to the beneficiary, as well as an Agent portion of the form that you can complete and submit after the appointment.

Scope of Appointment Page

The Scope of Appointment page provides options for you to facilitate an SOA request via email, phone, or mail. When you use the electronic (email) method to obtain SOA information from the beneficiary, you can also return to this page to complete and submit the Agent portion of the SOA form after the appointment.

During a consultation or while working with a beneficiary profile, you can access this page by selecting the SOA tab or clicking **Continue** from the Start a New Profile or Update Profile page.

Example Screenshot(s)

Before Sending Consumer SOA Form

SOA Sections

Note: In order to utilize any of the sections below, the agent MUST be in a member's profile.

#	TASK	DETAILS
1	Scope of Appointment section	This section will 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). See **After Receiving Consumer SOA Form** and **After Submitting Agent SOA Form** sections below
2	Upload section	Agents may upload completed SOA's from files on their desktop. Users may view an uploaded SOA in a pdf format by clicking the name assigned at the time of the file was uploaded.
3	Select Scope of Appointment Method	This section allows the agent to email a SOA to the beneficiary.

After Receiving Consumer SOA Form

After Submitting Agent SOA Form

Task Table

#	TASK	DETAILS
1	Facilitate the SOA request	Select the beneficiary's preferred method of providing SOA information: • **Email** – If the beneficiary's email address was previously entered when creating the profile, the email address is populated by default. You can email the beneficiary an SOA form to complete. This is the quickest method to obtain SOA information, as it allows you to complete and submit the Agent portion of the form online as well. The SOA form is generated using information from the beneficiary profile. To see an example of the form that the beneficiary will complete, see **"Example SOA Forms" on the next page**. **TIP:** After emailing the SOA form, you may want to create a task to follow up with the beneficiary to ensure the form is completed and returned prior to the scheduled appointment time.
2	View the plan types requested by the beneficiary	If you 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. You can return to this page to review the plan types that the beneficiary wants to discuss.
3	Complete the Agent SOA form	After the meeting, you can return to this page to complete the Agent portion of the SOA form. This form allows you to enter information about the plans that you presented to the beneficiary during the meeting. To see an example of the form that you will complete, see **"Example SOA Forms" on the next page**. To open the form, click the *Awaiting to Be Submitted* status. The Agent SOA form appears, and the SOA status changes to *Finish and Submit SOA*. Fill out all required information on the Agent form and submit the form. Once submitted, the SOA status changes to *Submitted*.
4	View a list of submitted SOA forms	In the future, you can return to this page to view a list of submitted SOA forms. Each SOA displays the plan types that the beneficiary expressed interest in. If you need to view the submitted SOA form, you can use the SOA Confirmation Number to request the form.

Example SOA Forms

Consumer SOA Form

Scope of Sales Appointment Confirmation Form

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.

Fields marked with an asterisk (*) are required.

Please check one or ALL the 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 <u>do not</u> 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 *	Amanda
Beneficiary's Last Name *	Woodman
Address (Line 1)	
Address (Line 2)	
City	
State	Select ⌄
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

Agent SOA Form

Scope of Sales Appointment Form (To Be Completed by Agent)

Scope of Appointment form needs to be completed and submitted for all scheduled appointments (even for no-shows, cancelled appointments, or those that do not result in a sale).

Agent First Name *

Agent Last Name *

Agent Phone

Please enter your 10 digit phone number with no hyphen or spaces (e.g., 2125551212).

Initial Method of Contact *

Phone

If the SOA form was signed by the beneficiary at time of appointment, provide explanation why SOA was not documented prior to the meeting.

Plan(s) represented during this meeting: *

Date Appointment Completed *

*

☐ By checking this box, I confirm the information represented here is true and accurate. I authorize my signature on the Scope of Appointment form using this information.

SUBMIT

Provide Health Information

Saving information about the beneficiary's location, age, and health allows the system to provide a list of available plans and calculate estimated out-of-pocket medical expenses. The age and health information you provide does not affect the plan premium or the beneficiary's eligibility for Medicare Advantage plans.

Health Information Page

The Health Information page allows you to provide location, age, and health information for a beneficiary.

During a consultation or while working with a beneficiary profile, you can access this page by selecting the Health tab or clicking **Continue** on the previous workflow page.

Example Screenshot(s)

Task Table

#	TASK	DETAILS
1	Provide health information	Answer the questions on this page to provide information about the beneficiary's ZIP code, age range, and health. **NOTE:** The beneficiary's zip code and age range are selected automatically based on the zip code and date of birth previously entered on the Profile tab.
2	Continue to the next step	To save this information and continue to the next page, click **Continue**.

Enter Subsidy Information

The Low-Income Subsidy, also known as "Extra Help," is available for eligible beneficiaries whose income and resources are limited. This subsidy provides assistance with prescription drug plan costs, including the premium, deductible, and copayments. Qualifying for this subsidy impacts plan pricing.

Medicare Extra Help Page

The Medicare Extra Help page allows you to indicate whether the beneficiary qualifies for the Low-Income Subsidy. Providing the beneficiary's subsidy information allows the system to adjust drug pricing and premiums in the plan cost estimates.

During a consultation or while working with a beneficiary profile, you can access this page by selecting the Subsidy tab or clicking **Continue** on the Health Information page.

Example Screenshot(s)

Task Table

#	TASK	DETAILS
1	Select subsidy eligibility	Select a radio button to indicate the level of assistance the beneficiary qualifies for.
		ι If the beneficiary is not eligible, choose **Not eligible**.
		ι If the beneficiary has not applied for the subsidy, and eligibility is unknown, choose **Uncertain**.
2	Continue to the next step	To save this information and continue to the next page, click **Continue**.

Add Prescription Drugs

Providing information about the beneficiary's prescription drugs allows the system to include anticipated drug costs in plan cost estimates. This is useful if the beneficiary is interested in a plan with drug coverage.

Add Drugs Page

The Add Drugs page allows you to enter the beneficiary's anticipated prescription drugs for the plan year. If the beneficiary is not interested in plans with drug coverage or is not sure which drugs will be needed, you can select a different tab or skip to the next step. It is recommended that you add any known prescription drug information, as this information allows you to provide a better cost estimate and helps the beneficiary understand potential drug costs.

During a consultation or while working with a beneficiary profile, you can access this page by selecting the Drugs tab or clicking **Continue** from the Medicare Extra Help page.

Example Screenshot(s)

Find a Drug

Add a Drug

Manage Drug List

Task Table

#	TASK	DETAILS
1	Find a drug	To find a drug, enter the first few letters in the search field. If you are unsure of the spelling, the **alphabetical list** link below the search field allows you to find a drug based on the letter the drug starts with. Use the drop-down search results list to select the drug.
2	Add a drug	After you find and select drug, additional fields appear, where you can enter dosage and quantity information. Common dosages appear by default. When you are finished, click **Add Drug**. The drug is added to the Drug List.
3	Manage the Drug List	If you need to edit the drugs that are on the Drug List, you can change the following: ι Change the drug dosage by clicking **Change**. ι Remove the drug by clicking **Remove**. ι Switch to the direct generic form of the drug by clicking the link provided. You can also continue finding and adding additional prescription drugs.
4	Continue to the next step	When you are finished adding drugs to the Drug List, to save this information and continue to the next page, click **Drug List is Complete**.

Add a Pharmacy

During a consultation, adding the pharmacy where the beneficiary fills prescriptions allows the system to more accurately estimate drug costs for plans with drug coverage.

Add Pharmacy Page

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

During a consultation or while working with a beneficiary profile, you can access this page by selecting the Pharmacy tab or clicking **Skip** or **Drug List is Complete** from the Add Drugs page.

Example Screenshot(s)

Find a Pharmacy

ADD PHARMACY

Select your pharmacy for the most accurate drug pricing. The search is based on proximity to the ZIP code you entered earlier. To perform a new search you can adjust the map or enter a new location in the search box. If you would like a pharmacy that supports e-prescribing, look for the *e* icon. You can skip this step If you do not want to select a pharmacy right now.

Please enter an address or 5 digit ZIP code.

| 2 | Enter Your ZIP code or street address | **FIND PHARMACIES** |

< DRUGS

1 | **SKIP** | **CONTINUE >**

Select a Pharmacy

ADD PHARMACY

Select your pharmacy for the most accurate drug pricing. The search is based on proximity to the ZIP code you entered earlier. To perform a new search you can adjust the map or enter a new location in the search box. If you would like a pharmacy that supports e-prescribing, look for the *e* icon. You can skip this step If you do not want to select a pharmacy right now.

Please enter an address or 5 digit ZIP code.
49546   **FIND PHARMACIES**

Tag	Pharmacy	Select
1 e	Meijer Pharmacy 5531 28th St SE Grand Rapids, MI Distance: **1.08 Mile(s)**	☐ 3
2	Wal-Mart Pharmacy 5859 28th Street Grand Rapids, MI Distance: **1.20 Mile(s)**	☐
3 e	Target Pharmacy 5120 28th St SE Grand Rapids, MI Distance: **1.22 Mile(s)**	☐
4 e	Trucare LTC Pharmacy 6140 28th St SE Ste 105 Grand Rapids, MI Distance: **1.38 Mile(s)**	☐
5 e	D & W Pharmacy 1573 6425 28th Street SE Grand Rapids, MI Distance: **1.55 Mile(s)**	☐
6 e	Family Fare - Forest Hills Pharmacy 4668 Cascade Rd SE Grand Rapids, MI Distance: **1.62 Mile(s)**	☐
7	Walgreens 4550 Cascade Rd SE Grand Rapids, MI Distance: **1.75 Mile(s)**	☐
8	Sams Pharmacy 10-6319 4326 28th Street SE Kentwood, MI Distance: **1.82 Mile(s)**	☐
9	Walgreens 6790 Cascade Rd SE Grand Rapids, MI Distance: **1.83 Mile(s)**	☐
10	Keystone Pharmacy 4021 Cascade Rd SE Grand Rapids, MI Distance: **2.37 Mile(s)**	☐

1 2 ... 3 Next Last

Pharmacy network may change on January 1st each year.

⭐ Central Point

To change the search location, you can adjust the map. Pharmacy results and distances are based on proximity to the central point on the map denoted by a gold star.

< DRUGS   SKIP   CONTINUE > 4

Task Table

#	TASK	DETAILS
1	Skip adding a pharmacy	It is recommended that you add the beneficiary's preferred pharmacy. This information allows you to provide a better cost estimate, which leads to better enrollment rates.
		However, if you want to skip adding a pharmacy, for example, if the beneficiary is not sure which pharmacy will be used or is not interested in plans with drug coverage, click **Skip**.
2	Search for a pharmacy by location	If you entered a ZIP code earlier while creating a profile, a list of pharmacies for that area appears. If you have not entered a location or if you want to search for a pharmacy in a different area, enter a ZIP code or address.
3	Select a pharmacy	The pharmacies are listed in proximity order to the location you entered. Any pharmacies with an icon in the **Tag** column support e-prescribing.
		To select the beneficiary's preferred pharmacy, click the pharmacy. The **Select** check box is marked to indicate the selected pharmacy.
4	Continue to the next step	To save this information and continue to the next page, click **Continue**.

View and Compare Plans

Use the pages described in this section to view and compare available plans. Plan costs and details are personalized for the beneficiary based on the information you entered into the system, and you can use this information to recommend a plan, send a quote, and begin enrollment.

View and Compare Plans Page

The View and Compare Plans page allows you to view all the plans that are available to a beneficiary. The available plans, plan pricing, and estimated costs are impacted by a number of factors, including the beneficiary's location, subsidy eligibility, prescription drugs, and pharmacy of choice. Plan cost estimates are more accurate with more information entered for the beneficiary.

During a consultation or while working with a beneficiary profile, you can access this page by selecting the Compare Plans tab or clicking **Skip** or **Continue** from the Add Pharmacy page.

Example Screenshot(s)

Task Table

#	TASK	DETAILS
1	Select a plan type	A tab appears for each available plan type. The available plan types vary based on the area, the plans that you are licensed to sell, and how your site administrator has configured the site. If a tab is unavailable, it is because no plans of that type are available to the beneficiary. The following default tabs may appear: • Medicare Advantage Prescription Drug Plans • Prescription Drug Plans • Medicare Advantage 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. The information for each plan includes the following: • Plan Name • Premium – monthly plan premium • Total Estimated Costs – the total anticipated out-of-pocket costs • Plan Rating – appears only when available • Carrier Name – appears only when applicable For each plan, you can view plan details and enroll in a plan.
3	Sort plans	You can use this drop-down menu to sort plans according to the following: • Plan Premium • Total Estimated Costs (default) • Medicare Star Rating
4	Compare plans	You can compare up to 3 plans side by side. Check the **Check to Compare** box next to the plans you want to compare. The Plan changes colors once selected. Click **Compare up to 3 Plans**. The Plan Comparison view opens. See **"Plan Comparison View" section**.
5	View plan details	To view additional plan information that does not appear on this page, click **View Plan Details**. See **"Plan Details View" section**.
6	Send a quote	To email the beneficiary a quote for this plan, click Send Quote. See **"Send a Quote Or Enrollment" section**.
7	Enroll in a plan	To select a plan and begin enrollment, click **Enroll in This Plan**.

Medicare Supplement Additional Information Window

The Medicare Supplement Additional Information window allows you to provide additional information to determine whether the beneficiary qualifies for Medicare Supplement plans.

You can access this window from the View and Compare Plans page by selecting the Medicare Supplement tab.

Example Screenshot(s)

NOTE: On your site, this window includes only the questions that are relevant to the available Medicare Supplement plans in the selected ZIP code. For example, the tobacco question does not display if the available plans do not have a smoking factor. You will most likely not see all of the questions pictured below.

Task Table

#	TASK	DETAILS
1	Determine eligibility and premiums	Your answers to the questions on this window are used to determine Medicare Supplement plan eligibility and plan premiums. Gather the beneficiary's answers and complete these questions.
3	Provide Guaranteed Issue information	To determine if the beneficiary qualifies for reduced rates through a Guaranteed Issue or Open Enrollment period, check the box next to each statement that applies to the beneficiary.
3	Submit your answers	To submit these answers and view available Medicare Supplement plans, click **Submit Your Answers**.

Plan Comparison View

The Plan Comparison view allows you to compare 2 or 3 plans side by side. The plans that you select for comparison must belong to the same Plan Type.

You can access the Plan Comparison view from the View and Compare Plans page by checking the **Check to Compare** box next to the plans you want to compare, and then clicking **Compare up to 3 Plans**.

Example Screenshot(s)

1 PLAN COMPARISON

Here are plan highlights for the plans you selected.

This is a summary, not a comprehensive description of benefits. Benefits, premium and/or copayments/coinsurance may change on January 1, 2018

5 SEND MULTI-PLAN QUOTE

	flexcare MAPD plan 6	flexcare MAPD plan 3
	2 VIEW DETAILS	VIEW DETAILS
< PREVIOUS	**4** SEND QUOTE ENROLL **6**	SEND QUOTE ENROLL

Costs		
Premium ❓	**$0.00** per month	**$33.00** per month
Estimated medical costs based on age and health ❓	$0 per year	$0 per year
Estimated Drug Costs based on 0 drugs in Drug List ❓	$0 per year	$0 per year
Total Estimated Costs ❓	$0 per year	$396 per year

Coverage Overview		
Medicare Star Rating ❓	N/A	N/A
Is My Pharmacy in the Network?	Pharmacy Directory **3**	Pharmacy Directory
Are My Drugs Covered? ❓	0 of 0 drugs are covered	0 of 0 drugs are covered

Benefits—Amounts You Pay		
Medical Deductible ❓	$0.00	$0.00
Medical Out of Pocket Maximum ❓	$4,900.00	$3,400.00
Doctor Office Visit ❓	$5 copayment PCP's Office	$5 copayment PCP's Office
Specialist Office Visit ❓	$45 copayment Specialist's Office	$45 copayment Specialist's Office
Hospital Inpatient Stay ❓	$300 copayment per day, days 1 to 6, Inpatient Hospital	$300 copayment per day, days 1 to 6, Inpatient Hospital

Optional Coverage		
Type of optional coverage available for each plan	★ Combined Ancillary Rider 🦷 Dental Rider ★ Hearing 👓 Vision	★ Combined Ancillary Rider 🦷 Dental Rider ★ Hearing 👓 Vision

	flexcare MAPD plan 6	flexcare MAPD plan 3
	VIEW DETAILS	VIEW DETAILS
< PREVIOUS	SEND QUOTE ENROLL	SEND QUOTE ENROLL

Task Table

#	TASK	DETAILS
1	Compare plans	The Plan Comparison view displays common benefits that you 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. You can use this page to answer many of the beneficiary's questions about the benefits of one plan over another.
2	View plan details	If the beneficiary has a question that you cannot answer using the high-level details provided by the Plan Comparison view, the **View Details** button allows you to see additional details for a particular plan. See **"Plan Details View" on the next page**.
3	Access physician and pharmacy directories	Depending on the plan type, Physician and Pharmacy Directories may be made available in the Coverage Overview Section. These directories allow you to see whether a physician or pharmacy are in network for a plan. **PHARMACY FINDER** Enter an address or ZIP code to view nearby network pharmacies. Please enter an address or 5 digit ZIP code. 90010 **FIND PHARMACIES** **Tag Pharmacy** — **Pharmacy Type** **1** * Hyundai Drugs — Standard Cost Share / In Network / Retail / Ext. Day Supply 461 S Western Ave Los Angeles, CA 90020 (213) 480-3322 Distance: **0.37 Mile(s)** **2** * Ralphs Pharmacy — Standard Cost Share / In Network / Retail / Ext. Day Supply 670 S Western Ave Los Angeles, CA 90005 (213) 383-6207 Distance: **0.39 Mile(s)** **3** * CVS Pharmacy #09660 — Standard Cost Share / In Network / Retail / Ext. Day Supply 3751 Wilshire Boulevard Los Angeles, CA 90010 (213) 385-5030 Distance: **0.40 Mile(s)** **4** * Serrano Medical Pharmacy — Standard Cost Share / In Network / Retail 4220 W 3rd Street Ste 100 Los Angeles, CA 90020 (213) 384-3405 Pharmacy with Preferred Cost Share Pharmacy with Standard Cost Share Pharmacy network may change on January 1st each year.
4	Send a quote	To begin the Quick Quote process for a plan on this page, find the plan and click **Send Quote**. See **"Send a Quote or Enrollment" section**.
5	Send a multi-plan quote	To begin the Quick Quote process for all plans on this page, click **Send Multi-Plan Quote**. See **"Send a Quote or Enrollment" section8**.
6	Enroll in a plan	While you are using the Plan Comparison view to compare plans, the beneficiary may decide which plan to enroll in. If your company allows online enrollments, you can begin enrollment by clicking **Enroll** and using your company's guidelines to complete the online enrollment form. See **"Enroll a Beneficiary" section**.

Plan Details View

The Plan Details view allows you to view the details for a specific plan. You can access this view from the View and Compare Plans page or from the Plan Comparison view by clicking **View Details**.

Example Screenshot(s)

PLAN DETAILS FOR FLEXCARE PDP PLAN 2

Here are the details for the plan you selected.

This is a summary, not a comprehensive description of benefits. Benefits, premium and/or copayments/coinsurance may change on January 1, 2018.

< PREVIOUS   [SEND QUOTE] [ENROLL]

[1]

Costs	
Premium	❓ **$51.50** per month
Estimated Drug Costs based on 3 drugs in Drug List change	❓ $57,997 per year See Estimate By Month **[2]**
Total Estimated Costs	❓ $58,615 per year See Estimate By Month **[3]**

Coverage Overview	
Medicare Star Rating	N/A
Is My Pharmacy in the Network?	CVS Pharmacy #09660 is an in-network pharmacy with standard pricing Pharmacy Directory **[4]**
Plan covers these drugs from Drug List **[5]** ❓	• amphetamine/dextroamphetamine salts combo TAB 20MG • Tracleer TAB 125MG
Plan does not cover these drugs from Drug List	• Anafranil CAP 50MG;

Benefits—Amounts You Pay	
Pharmacy Coverage ❓	
Pharmacy Deductible	$310.00
Initial Coverage Limit	$2,850.00
One Month Supply (Retail) Pharmacy with Preferred Cost Sharing	
Preferred Generic	$0.00
Generic	$8.00
Preferred Brand	$45.00
Non-Preferred Brand	$95.00
Specialty Tier	25%
One Month Supply (Retail) Standard Pharmacy	

Optional Coverage (available for additional premium)	
Flexcare Vision	
Premium	**$10.00** per month
Deductible	0
Contact Lenses	Allowance of $200 towards contact lenses, eyeglasses, or combination of lenses or frames every 24 months
Annual Maximum Benefit	1700
Eye Examination	One routine vision exam every two calendar years
Prescription Glasses	100 every two calendar years for one set of frames and prescription lenses or contact lenses (in place of eyeglasses) from any licensed vision care supplier

FlexCare PDP Plan 2

[6] [SEND QUOTE] [ENROLL] **[7]**

< PREVIOUS

Plan: S9999-037-000

Task Table

#	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 **See Estimate by Month**. This option is available only for plans with drug coverage. See **"Estimated Drug Costs and Restrictions Page" on the next page**.
3	View monthly total costs	If the beneficiary is interested in viewing total estimated out-of-pocket expenses, click the **See Estimate by Month**. See **"Total Estimated Costs Page" on page 46**.
4	Access physician and pharmacy directories	Depending on the plan type, Physician and Pharmacy Directories may be made available in the Coverage Overview Section. These directories allow you to see whether a physician or pharmacy are in network for a plan.
5	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 **Drug List** link. See **"Add Prescription Drugs" section**.
6	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. See **"Send a Quote or Enrollment" section**.
7	Enroll in the plan	To enroll in the plan, click **Enroll**.

Estimated Drug Costs and Restrictions Page

The Estimated Drug Costs and Restrictions page allows you to review estimated drug costs and restrictions for a plan. You can access this page from the Plan Details view by clicking **See Estimate by Month** in the drugs section.

Example Screenshot(s)

ESTIMATED DRUG COSTS AND RESTRICTIONS

- FlexCare PDP Plan 2

Here are the estimated costs and restrictions for each drug. Modify Drug List. `1`

< Previous

ENROLL

CVS Pharmacy #09660
3751 Wilshire Boulevard Los Angeles,CA   Mail Order `3`

Monthly Costs (after deductible is met) `2`	Your costs per fill by coverage phase				Drug Restrictions		
Tier	Retail Cost	Before Gap	During Gap	After Gap	Prior Auth.	Quantity Limits	Step Therapy
amphetamine/dextroamphetamine salts combo TAB 20MG 60 per month,							
Generic	$96.96	$8.00	$35.88	$4.85	YES	60 / 30 Days	NO
Anafranil CAP 50MG [15] 90 per month,							
Not Covered	$3,886.61	$3,886.61	$3,886.61	$3,886.61	NO	N/A	NO
Tracleer TAB 125MG [9] 60 per month,							
Specialty Tier	$13,059.45	$3,264.86	$8,488.64	$652.97	YES	N/A	NO

15 Any amount you spend for a non-formulary drug is not counted towards the deductible, initial coverage limit or out of pocket costs UNLESS the plan approves a formulary exception. If an exception is approved, the non-formulary drug will be covered. The drug cost displayed is only an estimate and actual cost may vary. Please contact the plan for more information.

9 This drug may only be available at certain pharmacies due to reasons such as special handling or requirements by the Food and Drug Administration. Please contact the plan for details.

Formulary ID: 14078
Version: v1

CVS Pharmacy #09660
3751 Wilshire Boulevard Los Angeles,CA   Mail Order

Estimated Drug Cost by Month `4`

Month	Drug Name	Phase	Amount
January	amphetamine/dextroamphetamine salts combo TAB 20MG	DEDUCTIBLE	$96.96
	Anafranil CAP 50MG	DEDUCTIBLE	$3,886.61
	Tracleer TAB 125MG	DEDUCTIBLE, Initial Coverage, Gap, Catastrophic	$4,024.29
February	amphetamine/dextroamphetamine salts combo TAB 20MG	Catastrophic	$4.85
	Tracleer TAB 125MG	Catastrophic	$652.97
	Anafranil CAP 50MG	Catastrophic	$3,886.61
	amphetamine/dextroamphetamine salts combo TAB 20MG	Catastrophic	$4.85
December	amphetamine/dextroamphetamine salts combo TAB 20MG	Catastrophic	$4.85
	Tracleer TAB 125MG	Catastrophic	$652.97
	Anafranil CAP 50MG	Catastrophic	$3,886.61
Total			**$57,996.59**

< Previous

ENROLL `5`

Plan: S9999-037-000

Task Table

#	TASK	DETAILS
1	Change the selected drugs	If necessary, you can make changes to the drugs you selected by clicking **Modify Drug List**. See **"Add Prescription Drugs" on page 31**.
2	Review the selected drugs	The first table on this page details the prescriptions drugs that were entered for the beneficiary on the Add Drugs page. This includes drug pricing by phase and any restrictions.
3	Switch between retail and mail order pricing	Drug retail pricing appears by default. If the beneficiary orders drugs through the mail, you can view mail order pricing by selecting the Mail Order tab.
4	Review estimated drug costs and restrictions	The second table on this page allows you to review the beneficiary's estimated drug costs and per month under the selected plan. These amounts are calculated based on the plan's coverage and the coverage start date / phase.
5	Enroll in the plan	To enroll in the plan, click **Enroll in This Plan**. See **"Enroll a Beneficiary" on page 53**.

Total Estimated Costs Page

The Total Estimated Costs page allows you to review the beneficiary's estimated out-of-pocket costs for a plan. You can access this page from the Plan Details view by clicking **See Estimate by Month** in the Total Estimated Costs section.

Example Screenshot(s)

TOTAL ESTIMATED COSTS – FLEXCARE PDP PLAN 2

The table below lets you answer questions about when the deductible will be met and when the donut hole will begin and end. Medical costs are distributed equally across every month; please remind that medical needs may result in variations in costs and timing.

< Previous   ENROLL

| | | | | CVS Pharmacy #09660 3751 Wilshire Boulevard Los Angeles,CA | | | Mail Order | 2 |

1 Total Estimated Costs by Month ❓

Costs	$8059	$4596	$4596	$4596	$4596	$4596	$4596	$4596	$4596	$4596	$4596	$4596

$10074
$9067
$8059
$7052
$6045
$5037
$4030
$3022
$2015
$1007

| Month | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec |

■ Premium ■ Deductible ■ Copay ■ Gap ■ Catastrophic

| | CVS Pharmacy #09660 3751 Wilshire Boulevard Los Angeles, CA | Mail Order |

Total Estimated Monthly Costs

Month ❓	Drug Cost ❓	Drug Phase ❓	Premium ❓	Total Monthly Cost ❓
January	$8,007.86	Deductible ($4196.61)/ Copay ($635.00)/ Gap ($2842.89)/ Catastrophic ($333.36)	$51.50	$8,059.36
February	$4,544.43	Catastrophic ($4544.43)	$51.50	$4,595.93
March	$4,544.43	Catastrophic ($4544.43)	$51.50	$4,595.93
April	$4,544.43	Catastrophic ($4544.43)	$51.50	$4,595.93
May	$4,544.43	Catastrophic ($4544.43)	$51.50	$4,595.93
June	$4,544.43	Catastrophic ($4544.43)	$51.50	$4,595.93
July	$4,544.43	Catastrophic ($4544.43)	$51.50	$4,595.93
August	$4,544.43	Catastrophic ($4544.43)	$51.50	$4,595.93
September	$4,544.43	Catastrophic ($4544.43)	$51.50	$4,595.93
October	$4,544.43	Catastrophic ($4544.43)	$51.50	$4,595.93
November	$4,544.43	Catastrophic ($4544.43)	$51.50	$4,595.93
December	$4,544.43	Catastrophic ($4544.43)	$51.50	$4,595.93
Annual Total	**$57,996.59**		**$618.00**	**$58,614.59**

< Previous   ENROLL 3

Plan: S9999-037-000

Task Table

#	TASK	DETAILS
1	Review your total estimated costs by month	The bar graph and table on this page allow you to answer any of the beneficiary's questions about how total estimated costs are calculated for this plan. Hovering the mouse over any section of the bar graph allows you to the amount of that category for the month. The numbers charted on the graph are detailed in the table below.
2	Switch between retail and mail order pricing	Drug retail pricing appears by default. If the beneficiary orders drugs through the mail, you can view mail order pricing by selecting the Mail Order tab.
3	Enroll in the plan	To enroll in the plan, click **Enroll in This Plan**.

Send a Quote or Enrollment

Quick Quotes are an effective way to deliver plan information and/or a link to an online enrollment form to a beneficiary via email. The email provides system-generated links that allow beneficiaries to access the consumer PlanCompare website and complete their own enrollments online. The links provided in the email contain your Agent ID, which ensures you get credit for any enrollments that result from the Quick Quote.

You can send a Quick Quote using one of the following methods:

- **Send Quote** – If a beneficiary has a profile in the system, you can send a Quick Quote while shopping for plans through the beneficiary's active profile. The **Send Quote** button appears on the following pages:
  - ○ View and Compare Plans page
  - ○ Plan Details view
  - ○ Plan Comparison view

Alternatively, you can also use the **Send Multi-Plan Quote** button on the Plan Comparison view to email a plan comparison.

- **Send Quick Quote** – If a beneficiary contacts you asking for a quote for a plan but does not want to   provide any personal information, you can send a Quick Quote at any time by clicking the **Send Quick Quote** "Start Over" button at the top of any page.

> **IMPORTANT:** Clicking this button creates a new profile and navigates you away from the page you are currently working on.

Quick Quote Window

The Quick Quote window allows you to send a quote and/or enrollment form to a beneficiary.

Example Screenshot(s)

Task Table

#	TASK	DETAILS
1	Enter the beneficiary's information	Enter the beneficiary's **First Name**, **Last Name**, and **Phone** number.
2	Select the information to send	You can send the quote and enrollment form, or, if the beneficiary has already chosen a plan for enrollment, you can send only the link to the online enrollment form.
3	Select the method of delivery	**Email** – This option allows the system to email the information to the beneficiary immediately upon clicking **Send Quick Quote**.
4	Include a message to the beneficiary	This text box allows the broker to enter a personalized message to the beneficiary. The message will appear on the quote landing page, after the beneficiary enters the authorization code and enters the site. Note: The message should not exceed 500 characters.
5	Authorization code	If you are delivering the quote via email, the system automatically generates a unique authorization code. This code allows the beneficiary to access the information you send and ensures that any personal information provided in the quote is protected. For security purposes, the authorization code is sent to the beneficiary in a separate email from the quick quote.
6	Send the quote	To send the quote to the beneficiary, click **Send Quick Quote**. The beneficiary receives an email with a link to the plan information and a link to the enrollment form, as well as an email with an access code.

Example Screenshot(s)

Sample Quick Quote and Enrollment Email

This email is sent to the beneficiary.
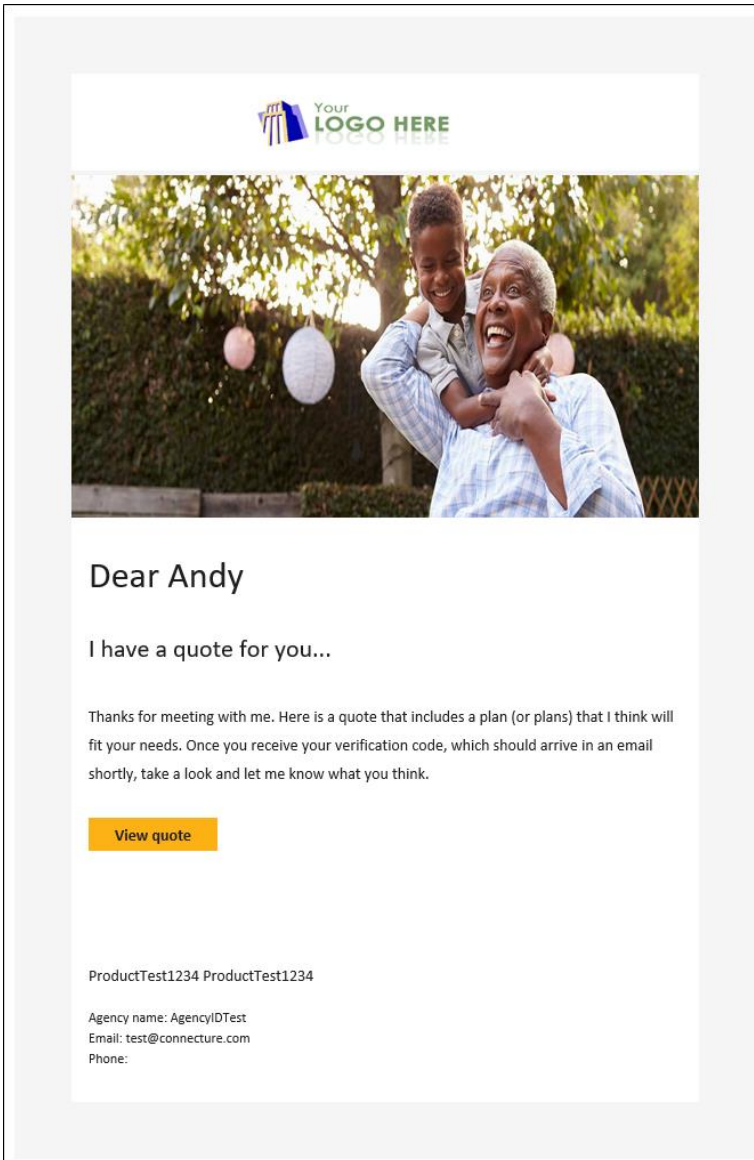
Sample Access Code Email

Dear Andy,

To keep your information secure, please use the authorization code below when you are ready to view the information I previously sent you.

Here is your authorization code:

MHSUvmCS

ProductTest1234 ProductTest1234

Agency name: AgencyIDTest
Email: test@connecture.com
Phone:
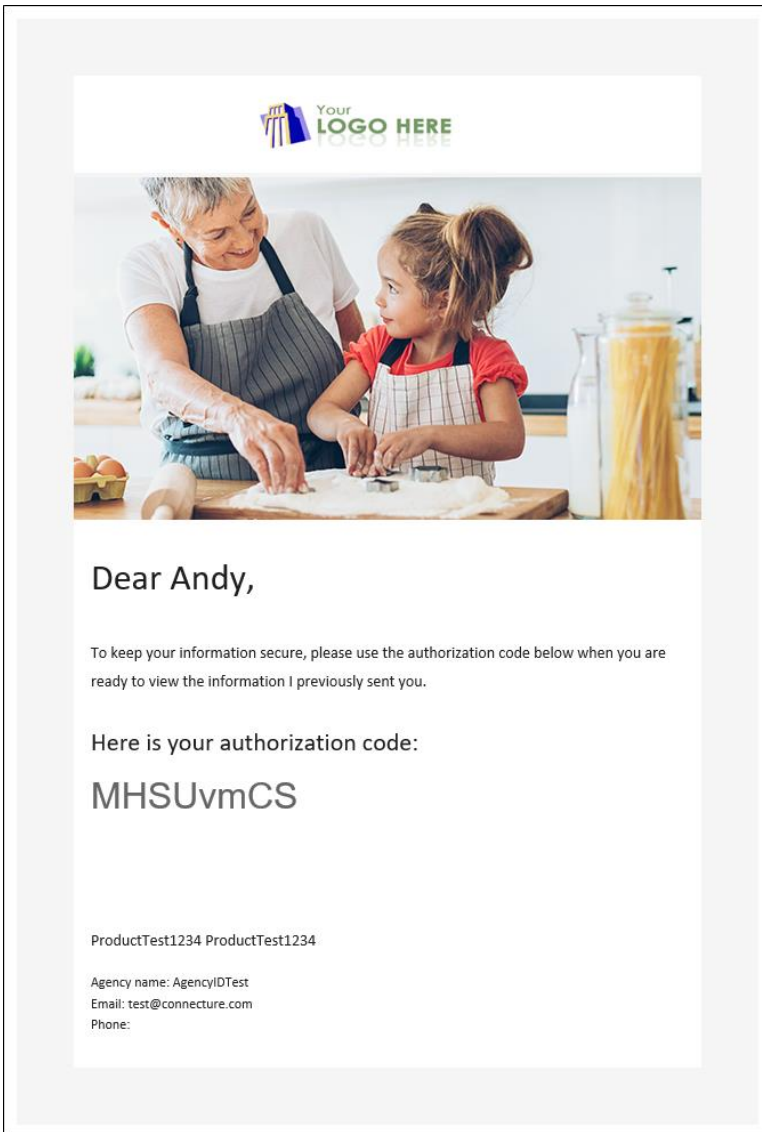
Enroll a Beneficiary

If the beneficiary has already chosen a plan for enrollment and you do not need a consultation to recommend a plan, you can skip the consultation process. The **Start New Enrollment** button allows you to begin a new enrollment from any page in the system.

You can also start an enrollment from any page with a specific plan. Clicking **Enroll** or **Enroll in this Plan** directs you to the enrollment form.

PPC's electronic enrollment form guides you through the process of submitting the enrollment application.

Enrollment Form Tips

> Your company may have a different enrollment form for existing members. If so, there will be a link on this page.

> Answer each of the required questions. If any required questions are left unanswered or formatted incorrectly, you are notified of the error and instructed on how to fix it.

> Continue through the enrollment until you receive the enrollment confirmation.

> If for any reason you need to exit the enrollment, use the **Save and Exit** link on the bottom left. All information entered is saved so that you can return to the enrollment at any time.

Frequently Asked Questions (FAQ)

Agents are often asked the same questions by beneficiaries. Below is a list of frequently asked questions and information about how you can use PPC to find the answer.

Which plans am I eligible for?

This is a common question that beneficiaries often ask upfront. You can view a simple list of available plans by completing the following steps:

1. Click **Start New Enrollment**.
2. Enter the beneficiary's ZIP code.
3. Click **Submit**.

A list of available plans in the area displays. Use the tabs to switch between plan types.

> **NOTE:** If the beneficiary is interested in shopping based on specific health, prescription, or pharmacy needs, you can also **Start Consultation** to make a more personalized recommendation at any time.

Which plan covers my prescription drugs?

1. Use the Add Drugs page to enter all of a beneficiary's prescription drugs.
2. On the View and Compare Plans page, you can review the available plans with drug coverage.
   - The Plan Details view lists which drugs are covered, and which are not.
   - The Compare Plans view allows you to compare up to 3 plans side-by-side and includes a Coverage Overview that shows how many of the beneficiary's drugs are covered.

Is a particular prescription drug covered by this plan?

The Formulary Drug Finder allows you to see if a drug is covered by a specific plan. In the footer on any page, access the Helpful Tools by clicking the **Drug Finder and Pharmacy Finder** link.

How will costs change if I switch from one drug to another?

1. On the Add Drugs page, you can quickly make changes to the beneficiary's drug list.
2. Return to the View and Compare Plans page and use the Plan Details view to view the plan's drug costs.

How are drug copays different across plans?

On the View and Compare Plans page, use the Plan Comparison view to quickly identify copay differences for tiers. You can compare up to 3 plans side-by-side at a time.

What will my costs be each month?

Use the Review Your Out-of-Pocket Costs page to see total estimated costs per month. This allows you to predict whether or not the beneficiary will hit the "donut hole." The Total Estimated Monthly Costs table is the best way to quote the estimated monthly costs for a particular plan.

What will my prescription drug costs be each month?

Use the Review Your Out-of-Pocket Costs page to see the monthly drug costs and whether or not the beneficiary will hit the "donut hole." The Total Estimated Monthly Costs table is the best way to quote the estimated monthly drug costs for a particular plan during different phases.

Are there direct generic drugs available for my prescriptions?

Use the Add Drugs page to review the beneficiary's prescription drugs on the Drug List. If any brand name drugs have a direct generic version available, a quick link is available, allowing you to replace the brand name drug.

Can I access the information I provided to you?

If your company has consumer PlanCompare, you can send the beneficiary a link to create an account. Enter the beneficiary's information on the Profile page and click the **Send Access to Consumer Site** button.

> **NOTE:** An external account is not necessary for you to return to the beneficiary's information in another session. You can access any saved information by searching for the beneficiary. Use the **Search Profiles** button to access this at any time.

Permissions

The following table describes the default user roles available to Professional PlanCompare users and the default permission levels associated with each role.

It is recommended that Broker users be given only Broker roles.

ROLE	VIEW/ADD/EDIT OWN PROFILES	VIEW/ADD/EDIT ALL PROFILES	COMPLETE ENROLLMENT	VIEW/ADD/EDIT ALL AGENT ACCOUNTS
Quoter	✔	✔		
Quoter_Broker	✔			
Quoter_Admin	✔	✔		✔
Enroller	✔	✔	✔	
Enroller_Broker	✔		✔	
Enroller_Admin	✔	✔	✔	✔