PlanCompare ONE

Professional User's Guide

CONNECTURE DRX

PLAN YEAR 2021

ConnectureDRX Documentation

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About Connecture

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

ConnectureDRX has been delivering compliant solutions for 20 years. Supporting 9 of the 10 top U.S. health insurance carriers, more than 50 national and regional FMOs, and with 4,600 plus plans on our platform, ConnectureDRX processed 800,000 Medicare and Medicare Supplement enrollment applications in the past year. Our regular consumer market surveys from more than 16,000 respondents affords unique insights on consumer shopping and enrollment behavior, driving innovation in research and development.

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Introduction

PlanCompare ONE for Professionals is the decision support solution that empowers Brokers and Call Center Agents (referred to collectively throughout this guide as 'Agents') to make personalized Medicare plan recommendations in which Medicare beneficiaries can electronically enroll. Agents can use PlanCompare ONE for Professionals 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, PlanCompare ONE for Professionals 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.

IMPORTANT: While this user guide explains how to use all the features of PlanCompare ONE for Professionals, each customer's rules, regulations, and site configurations may vary. Customers may use the portions of this guide that apply to their specific set-up to supplement their training materials and guides.

PlanCompare ONE for Professionals 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

- Ability to add customer / carrier specific call center scripts to ensure call center agents are meeting CMS guidelines

- 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

- Load profile data by manual input, preload file (see Member Eligibility) or through Salesforce integration (see additional documentation)

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

About this Guide

This guide describes the features available in PlanCompare ONE for Professionals.

This guide explains the standard 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 licensed customers of PlanCompare ONE for Professionals to supplement your training and educational materials for administrators and agents to understand how to use the features of the product.

PlanCompare ONE Professional

Login Page

On the login page, agents can log in to the PlanCompare ONE for Professionals site or reset a forgotten password.

Note: if the company uses Single Sign-On, agents will bypass this page.
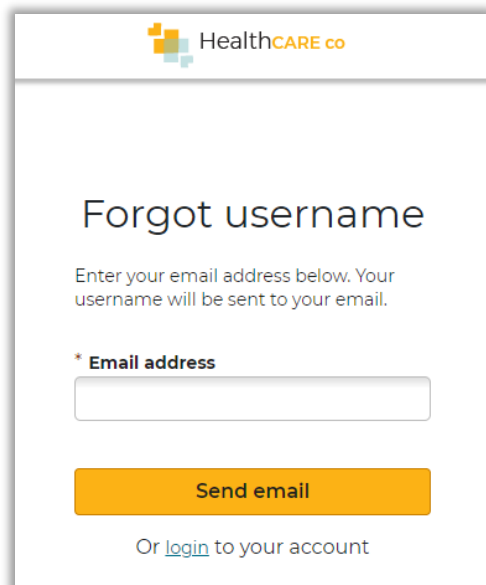
#	TASK	DETAILS
1	Log in	To enter PlanCompare ONE for Professionals, enter Username and Password, and click *Login*.
2	Forgot username	If agents forget their username, they can reset it by selecting *Forgot username*. This functionality requires that agents have an email on file in the agent record. This link opens the Reset Username page.
3	Forgot password	If agents forget their password, they can reset it by selecting *Forgot password*. This functionality requires that agents have an email on file in agent record. This link opens the Reset Password page.

Forgot Username

Below are the steps for the Forgot Username process.

Step 1 – Enter Username

Step 2 – Check email
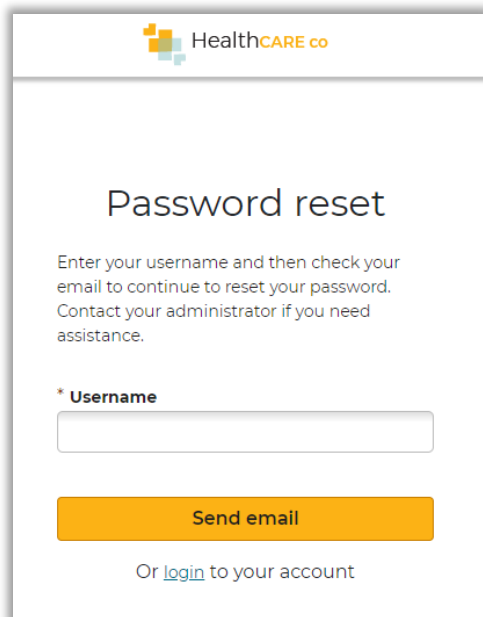
<need screenshot>

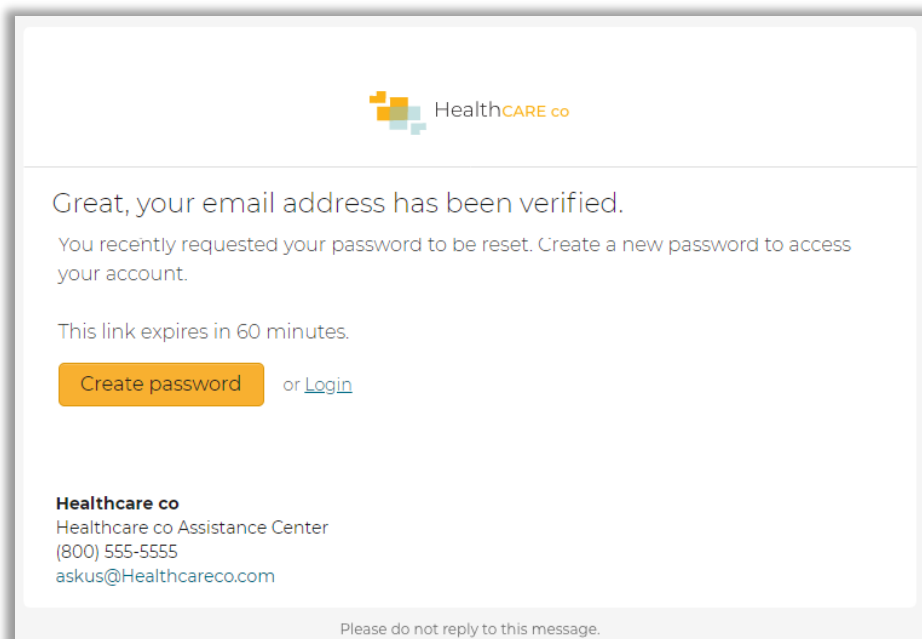| #	TASK	DETAILS
Step 1	Send a username recovery email	Enter the Username for the account and select *Send email*. The system sends an email to the email account associated with the Username. **NOTE**: If an email address does not exist on the professional user's account information, this process should not be used. Contact your site administrator.
Step 2	Forgot Username email	The user's Username is contained in the email. The user may then attempt to login to the site again.

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Forgot Password

Below are the steps for the Forgot Password process.

Step 1 – Enter Username

Step 2 – Check email

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Step 3 – Reset password

#	TASK	DETAILS
Step 1	Send a password recovery email	Enter the Username for the account and select *Send email*. The system sends an email to the email account associated with the Username. **NOTE**: If an email address does not exist on the professional user's account information, this process should not be used. Contact your site administrator.
Step 2	Reset Password email	Open the Reset Password email and select the *Create password* button. This link will navigate the agent to PlanCompare ONE for Professionals to reset their password.
Step 3	Enter a new password	Enter the new password. It is recommended that passwords contain letters and at least one number. Password may not contain any of the following characters: & < > ' " % + Confirm new password by entering it again. The password entered in both fields must match. Click *Reset password* button. User will be notified if the password reset was successful. The new password is effective immediately. Select the *Login* button to log in with the new password.

User Interface and Navigation

PlanCompare ONE for Professionals provides a clean, intuitive layout that allows agents to quickly and easily access the pages and functions needed to perform tasks.
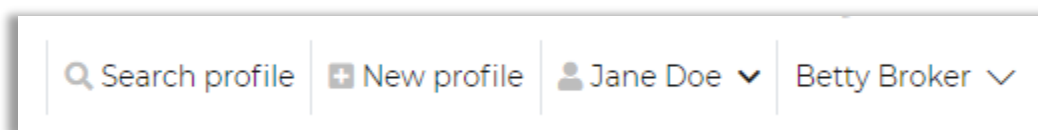
Global Header

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.

- *Plans* (if enabled on the site) **–** Click this button to access the plan list page and search for plans available in a ZIP code if the beneficiary does not want to provide first and last name. This supports anonymous browsing of plans.

  - **NOTE:** If an enrollment is made from this path, the information is not saved to a profile and is not retrievable. Agents should always start the enrollment from a Profile to be able to save and retrieve information.

- *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.

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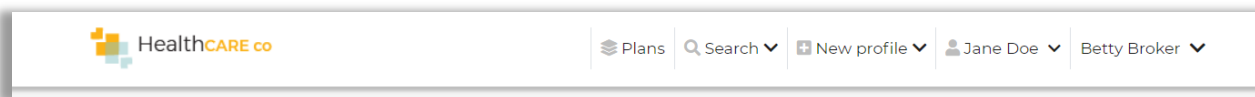
Agents will see "- - -" if there is no active Profile they are currently working with or they will see the beneficiary's name if they are working with a specific Profile.

Global header with no active profile

Global header with active profile displaying beneficiary's name

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Global header with Plans (browse anonymously) enabled

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.


Agents can click on their name in the top right corner to access the Account Overview (covered in Agent Account Overview) and to log out.

If site language translation is turned on, the agent will see the dropdown for language selection in the global header. For PY2021, PlanCompare ONE for Professionals' Enrollment can be translated into Spanish. Translating the shopping experience is not currently supported.

Agent sees the global Contact Us link in the header to access the customer's contact information.

Global Footer

On the bottom of each page, the footer contains links that allow agents to view additional information and access additional pages. Links can be either internal or external. If external, the links will open in a new tab or window based on the user's browser settings.
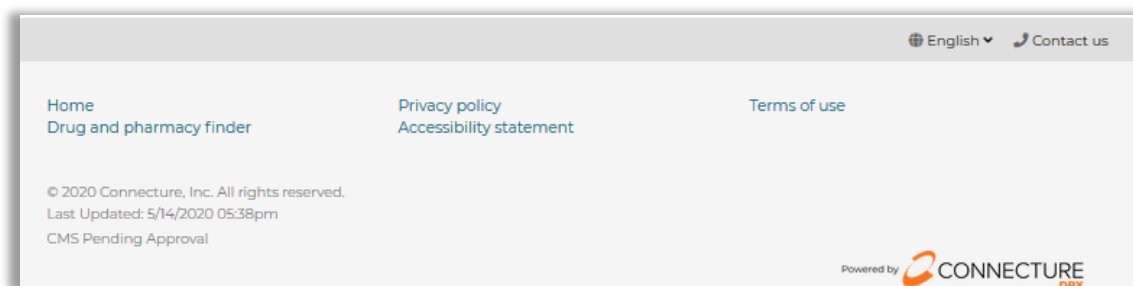
Footer

These links vary by site but may include the following:

- Home
- Drug and pharmacy finder
- Privacy policy
- Accessibility statement
- Terms of use

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Sub-header in Footer

This is the bar in the footer section which can contain links to switch languages or view contact information. The sub-header may include the following:

- Print
- Language
- Contact us

Call Center Scripts and Agent Instructional Information

Site administrators may add scripts or instructional text to appear on various pages throughout the system. These scripts contain prompts to guide call center agents or brokers through the process of working with a beneficiary on a specific page. Scripts can contain dynamic information about the profile the agent is working with.

For example, here is a script at the top of the prescriptions page that shows the dynamic beneficiary's last name (Doe) in the screenshot below:
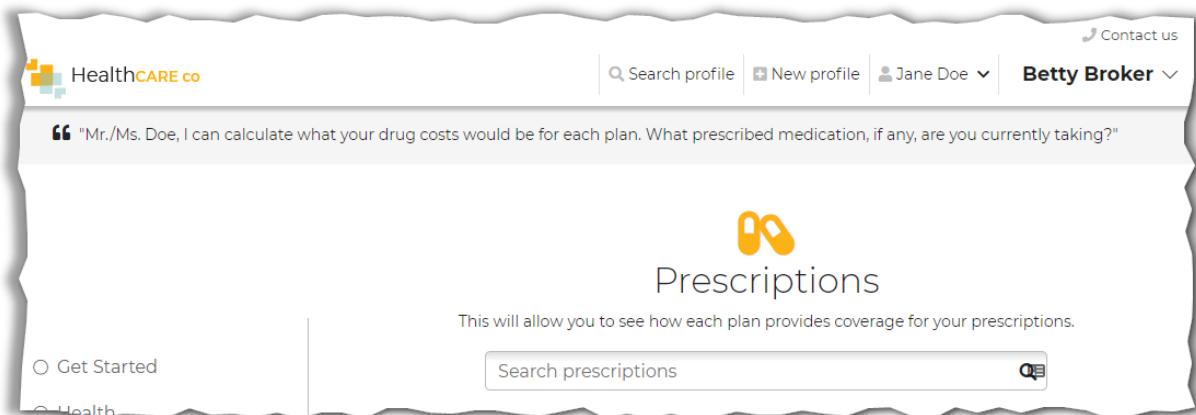
Beneficiary Profile

Salesforce Integration with Connecture Connect

If your organization uses Salesforce, please reach out to the Customer Success Team to learn about Connecture Connect, a managed package available in Salesforce. Connecture Connect syncs profile and enrollment information between Salesforce and Connecture sites to reduce duplicate entry and streamline information for agents in PlanCompare ONE for Professionals.

There is a separate configuration and user guide for installing and setting up Connecture Connect in Salesforce. Please reference that for detailed information.

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 Search beneficiaries page appears when agents first log in to PlanCompare ONE for Professionals. 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.

Search beneficiaries

Search results
An applicant has completed the SOA and/or enrollment. A registrant has not completed the SOA or enrollment.

Sort
last updated

5

Kelly Wallace   kwallace@gmail.com   ● Registrant   Bob Williams   updated 12/03/2019
1234 main st Atlanta, GA 53130   (555) 555-5555   bwilliams

Kelly McIntire   Jmcintire@gmail.com   ● Applicant   Nathan White   updated 12/01/2019
1234 main st Atlanta, GA 53130   (555) 555-5555   Nathan.White

or search again

Search beneficiaries

There are no results for the profile you searched, but you may create a new profile with that information.

6   Create a new profile

or search again

#	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. **NOTE**: Confirmation number can be used for SOA or Enrollment Confirmation numbers.
3	Search by personal code	Agents can assist anonymous beneficiaries, who do not have an account, by searching with a personal code. This code is provided by the beneficiary and is unique to the beneficiary's current session. When agents search with a personal code, they are navigated to Plan list page. All information from the beneficiary's current session is loaded for the agent. This helps the agent quickly assist the beneficiary without creating a profile and adding all details on the professional sites. Other search parameters like name, email etc. are ignored searching with a personal code.

#	TASK	DETAILS
4	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.
5	Access a beneficiary's profile	To access a beneficiary's profile, click the name of the beneficiary and the Edit Profile page opens.
6	No profile found; create a profile.	If no search results are found, agents can create a new profile and the search criteria that was entered will be automatically pre-filled into the New Profile.

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*.

> **NOTE**: Profiles can also be created using the Member Eligibility file or SAML SSO. Contact your Customer Success team with any questions.

#	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 agent can navigate to. These pages allow agents to see or update information.
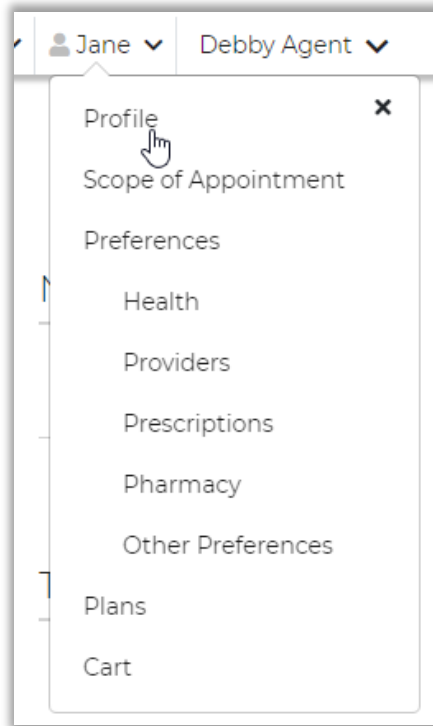
Agents can use the buttons at the bottom of pages to progress through the site in the recommended order. Navigate to any step and these actions will save information or prompt agents to save anything unsaved on the page.
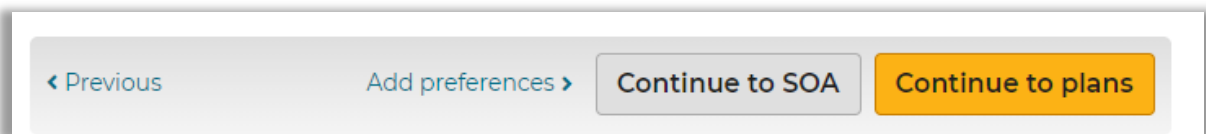
Notes and Tasks

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. In PlanCompare ONE for Professionals users, 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
- Blue Button integration with MyMedicare.gov initiated and/or completed

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
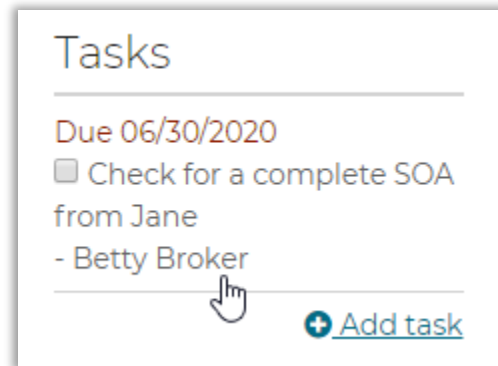
Scope of Appointment (SOA)

PlanCompare ONE for Professionals provides 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
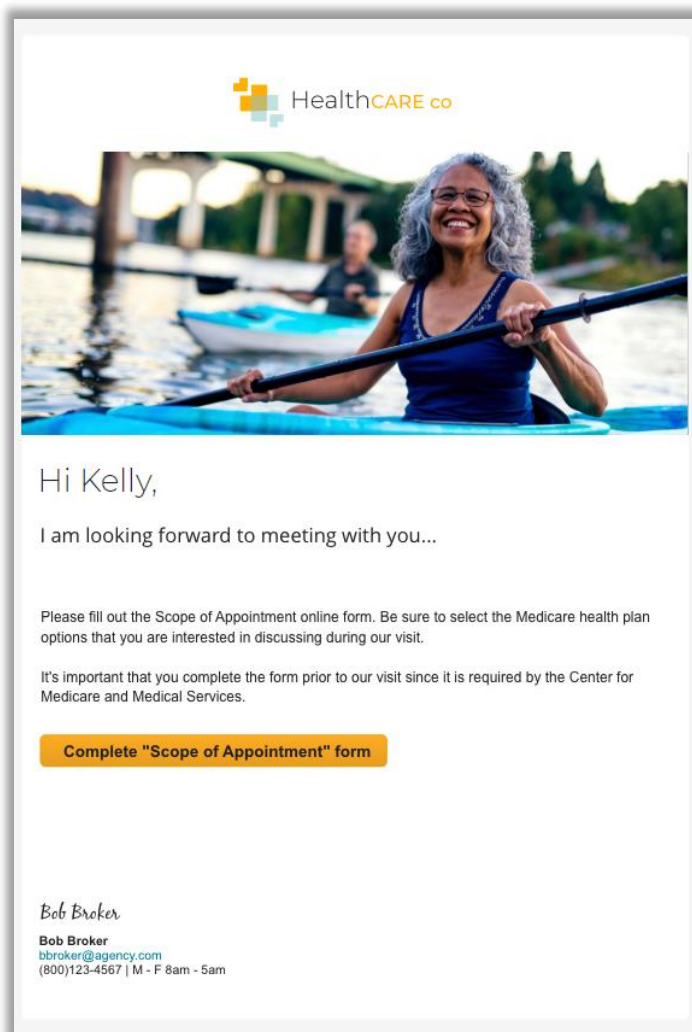
Sample Text Beneficiary Receives to Complete SOA Form
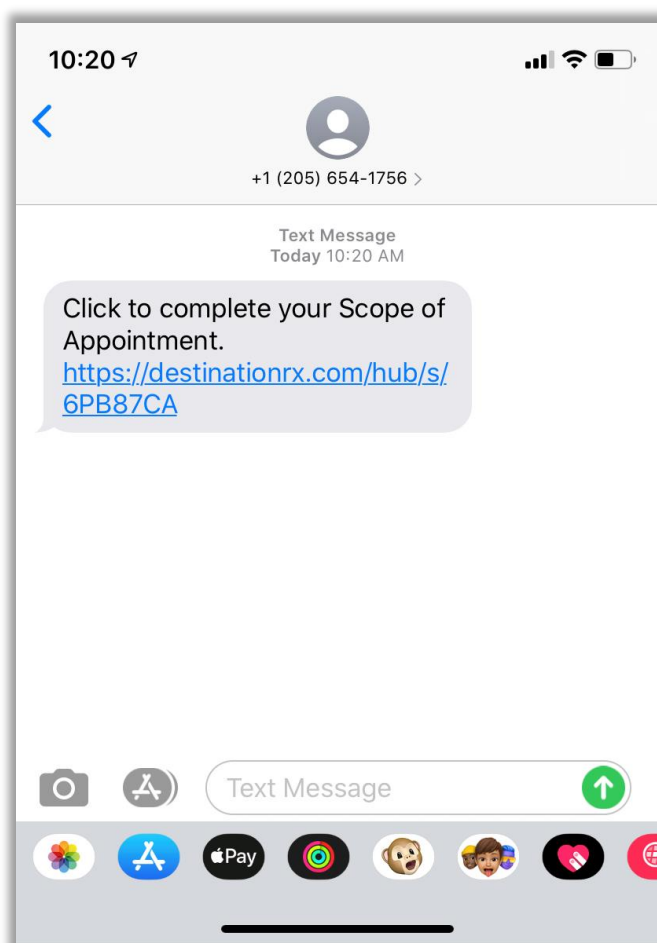
Sample Beneficiary SOA Form

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.

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.
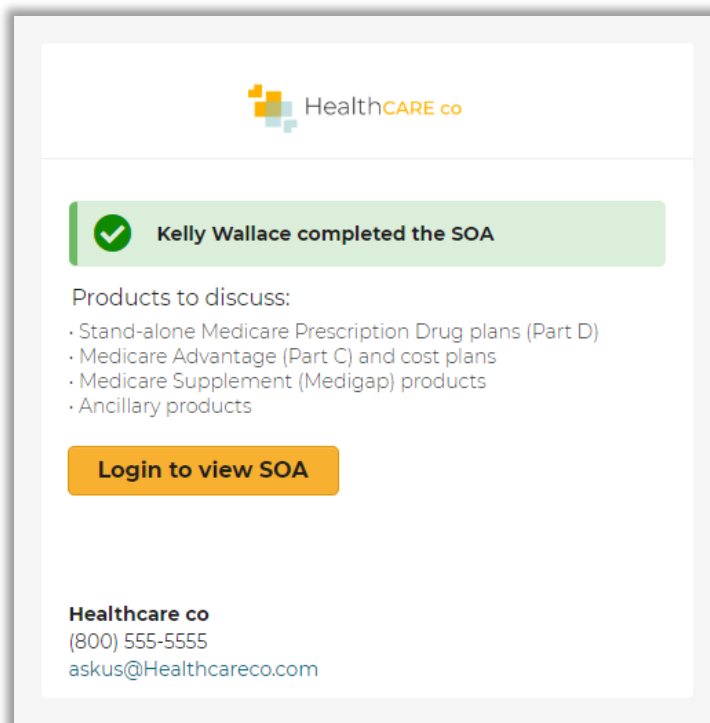
View After Receiving Beneficiary SOA Form

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*.

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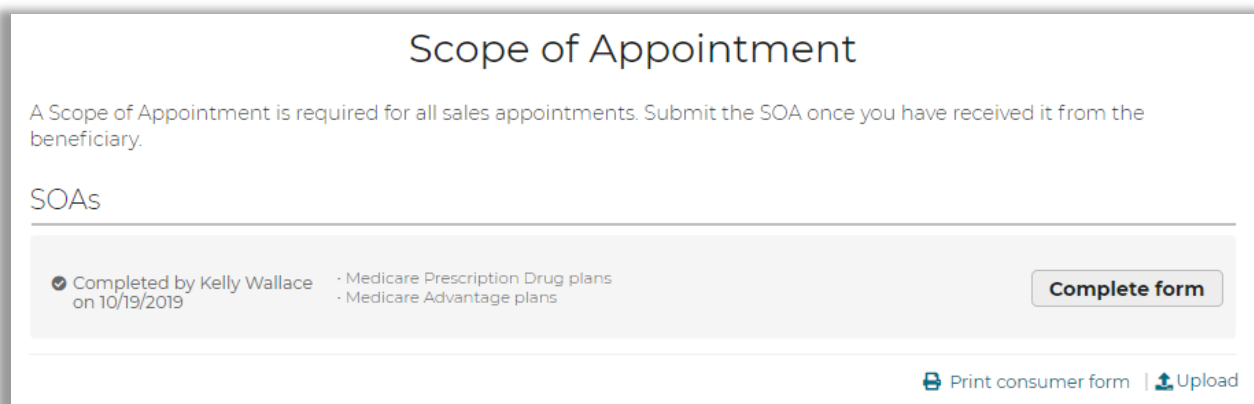
Agent Complete SOA Form

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*.

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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.
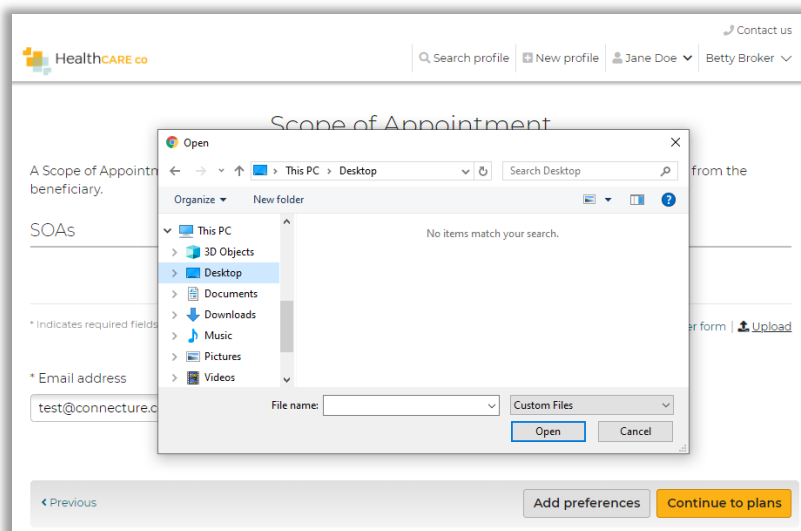
Add Preferences / Guided Help

In PlanCompare ONE for Professionals, agents can enter preferences 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.
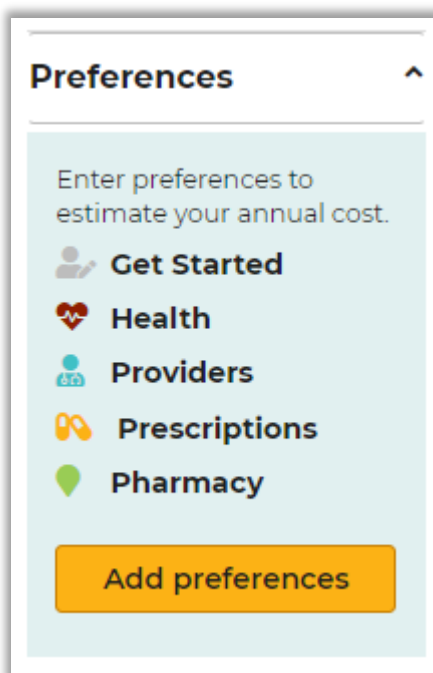
Get Started

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.

Providers

The Providers page allows agents to enter the beneficiary's providers. If the beneficiary is not interested in medical plans or does not want to add their providers at this time, agents can select a different page or skip to the next step. It is recommended that the beneficiary add providers information, as this allows agents and the beneficiary to understand if their providers are in network for plans when they are shopping and if their selected Primary Care Provider is eligible for their medical plan.

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

#	TASK	DETAILS
1	Select provider search area	If agents entered a ZIP code earlier while creating a profile, a list of providers for that area appears. If agents have not entered a location or if agents want to search for a provider in a different area, enter a ZIP code or address. Zoom in or out on the map and click to drag the map area. *Search this area* will appear as agents drag map.
2	Search provider by name	Provide a name and click search to view providers matching the name closest to the selected zip. It is also possible to search on specialty using this field.
3	Filter results	Agents can filter the providers returned by either individual doctors and other professionals or by facilities (hospitals, clinics and urgent care). Both types are shown automatically when results are returned. Uncheck the box to remove the type from the results.
4	Select a provider	The providers are listed in proximity order to the location entered. To select the beneficiary's provider, click the "Add provider" button in the list or by clicking on a pin on the map and selecting the button there. If multiple providers share the same location, the pin shows a group icon. Click the icon to open a list of providers at that location. The selected provider icon changes color and now says "Provider added" to indicate it is selected.
5	Selected providers list	The selected provider details display below the map. Providers can be removed by clicking the X.
6	Primary care provider (PCP)	Agents can select the beneficiary's Primary care provider (PCP) from any of the individual (not facility) providers added to the providers list. There can only be one PCP selected.
7	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.

Medicare Blue Button

Beneficiaries can connect their PlanCompare ONE profile with their MyMedicare.gov account to import their claims data and pre-populate drug information into their list of drugs. Agents should ask beneficiaries if they would like to connect with their MyMedicare.gov account to import their claims and drug information or if they would like to manually enter the drugs. If beneficiaries choose the importing from Medicare.gov option, Agents can initiate this process by sending an email to the beneficiary from the Prescriptions page.
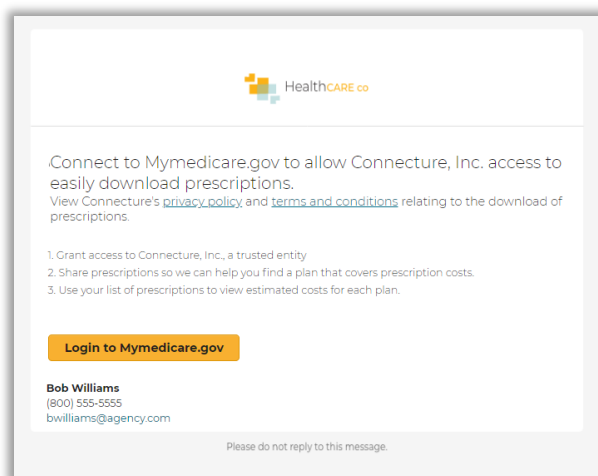
Agent Send Beneficiary Email to Connect

Agents can send an email to the beneficiary to connect their PlanCompare ONE profile with CMS claims data to import their prescription information instead of having to manually enter. Agents can still manually enter drugs in addition to the imported claims data. Enter the email address (this will pre-populate if available) and click *Send email*. Agent will then see the status "Waiting for access" until beneficiary grants access.
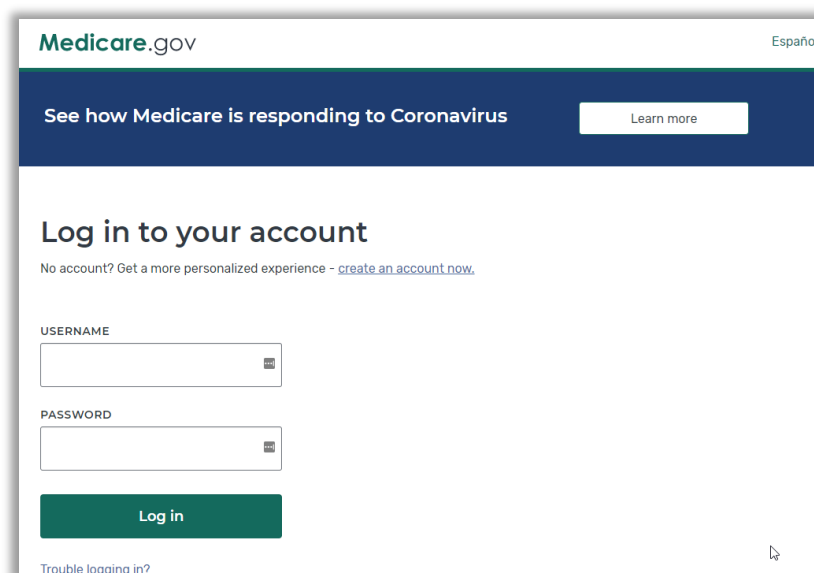
Sample Email Beneficiary Receives to Connect Blue Button

Beneficiaries click the link in the email to start the process. The link brings them to MyMedicare.gov where they create an account or login.

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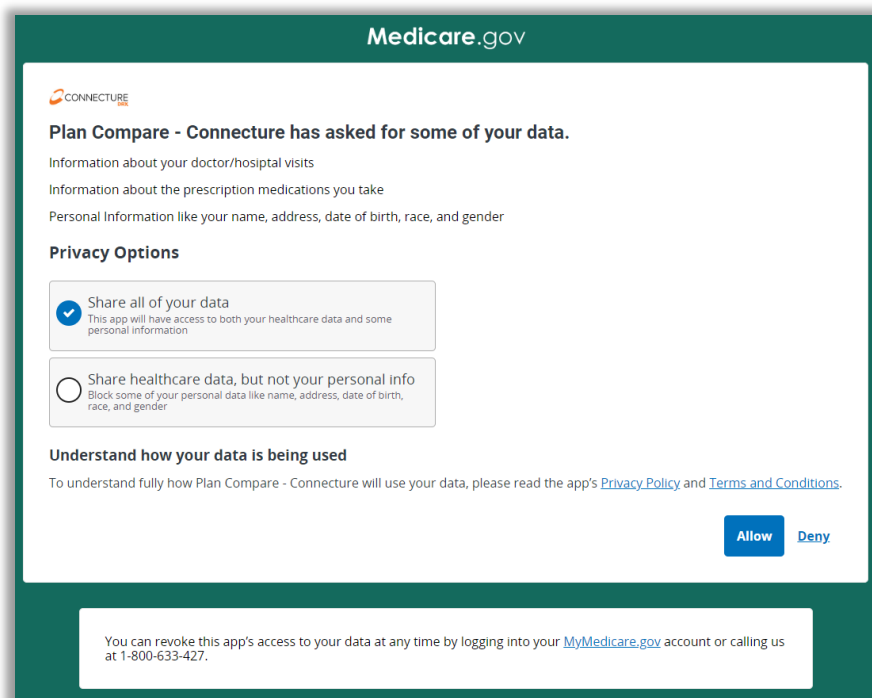
Sample Login and Grant Access Pages Beneficiary sees on CMS MyMedicare.gov

Beneficiary must create an account or login on MyMedicare.gov.
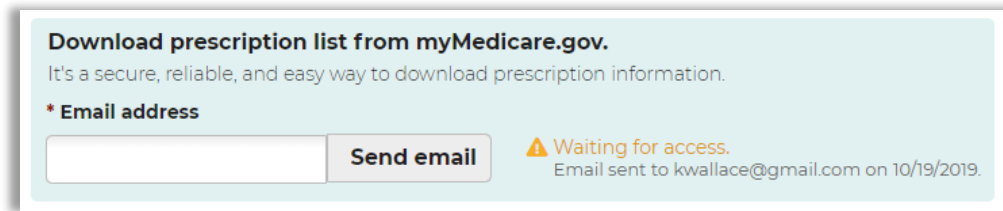
After logging in, beneficiary must Allow access. This is a sample page and may not reflect exactly what the beneficiary will see once they log in to MyMedicare.gov. They will see an Allow or Deny option and must select Allow to complete the process. They can choose between either privacy option and click *Allow* in order to proceed. Selecting the second option, "Share healthcare data, but not your personal info" and clicking *Allow* will still allow them to import their prescriptions.

Agent Statuses

The agent will see a status update on the Prescriptions page so they can tell what the beneficiary has done with the email link:

- Waiting for access
    - Waiting for the beneficiary to click *Allow* or *Deny* on the CMS page. If a lot of time has passed, Agent should follow up with beneficiary to see if they received the email or not. They can resend the email if the beneficiary asks for it.

- Issue loading prescriptions. Please try again.
    - If beneficiary has an issue connecting, the agent will see this status. Agent should resend the email and encourage beneficiary to try again.

- Beneficiary denied access
    - If beneficiary clicked *Deny* on the CMS access page, the agent will see this status. If the beneficiary clicked *Deny* in error, and asks the agent to resent the email, they may do so.

- Prescriptions shared successfully
    - If beneficiary clicked *Allow* on the CMS access page, the agent will see this status and see the list of prescriptions updated.

Sample Prescriptions Shared Successfully Page

After sharing prescriptions claims data successfully, the beneficiary sees a confirmation page with the drugs added to their medicine cabinet.
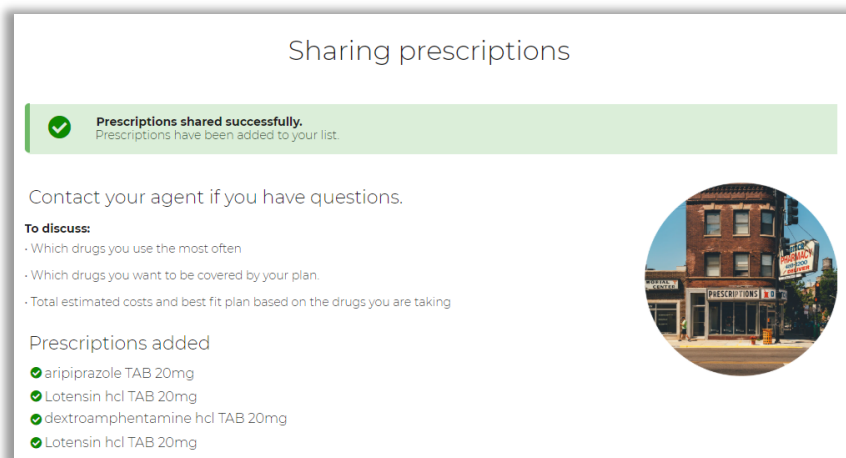
Email to Agent: Prescriptions Shared Successfully

After the beneficiary shares prescriptions claims data successfully, agents will receive an email (if there is an email on file for the account). Agents can log in and view the beneficiary's Prescription page and see all prescriptions added to their medicine cabinet.
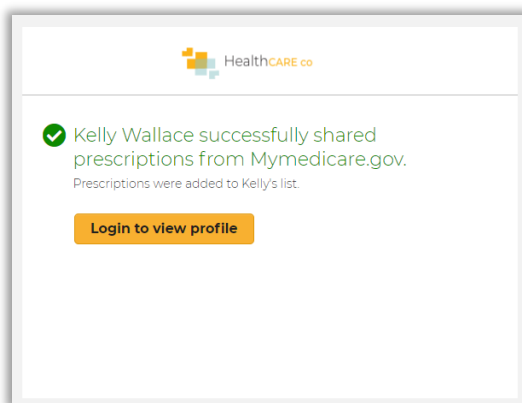
Import Latest Prescriptions

After beneficiary successfully shares their prescriptions claims data, the agent can Import latest prescriptions by clicking the *Import Latest Prescriptions* button on Prescriptions page.
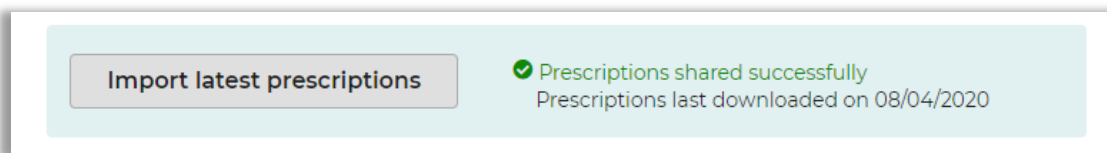
Pharmacy

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. Agents can also select more than one pharmacy for a beneficiary. Refer to the Multiple pharmacies section for more details.

#	TASK	DETAILS
1	Select pharmacy area	If agents entered a ZIP code earlier while creating a profile, a list of pharmacies for that area appears. If agents have not entered a location or if agents want to search for a pharmacy in a different area, enter a ZIP code or address. Zoom in or out on the map and click to drag the map area.

#	TASK	DETAILS
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 the button 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. *Search this area* will appear as agents drag map.
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	Search pharmacy by name	Provide a pharmacy name and click search to view pharmacies matching the name closest to the selected zip
6	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.

Other Preferences

Other Preferences page allows agents to answer questions about plan benefits that the beneficiary finds important and wants coverage for in a plan. Answering these is optional and agents can skip this page. It is recommended that the beneficiary add other preferences information, as this allows agents and the beneficiary to sort plans by the preference score and find the plans that best match their preferences while shopping.

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

#	TASK	DETAILS
1	Answer questions	Agents can answer the questions they see on the page about preferences for the beneficiary. Only questions for benefits pertaining to the beneficiary's coverage area will display.
2	Page information	Agents will see how many pages of questions are available and on which page they are currently.
3	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.

Multiple Pharmacies

This feature allows agents to select more than one pharmacy for a beneficiary. This feature will assist agents/brokers finding a pharmacy that will cover beneficiary's prescription list for a selected plan at the lowest possible cost.

Guided Help Pharmacy page

When this feature is enabled on the site, agents can add more than one (up to 3) pharmacies at a time. All pharmacies added are listed below the map. The first pharmacy added is defaulted to the Primary pharmacy and costs are initially based off this pharmacy. Agents have the option to change the primary pharmacy. Agents can also filter pharmacies displayed on the map using the filter dropdown.

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#	TASK	DETAILS
1	Add multiple pharmacies	All pharmacies added are displayed below the pharmacy map
2	Primary pharmacy	First pharmacy added is set as the Primary pharmacy. Plan rates will initially be based off the primary pharmacy. Agents can change primary pharmacy by clicking the 'set as primary' link for any of the other added pharmacies. At a time only one pharmacy can be set as 'Primary' for a member profile.
3	Filters	Agents can use the filters to filter pharmacies displayed on the map or list. Filters are data driven and are only shown if there is a pharmacy available for that filter on the map. Filter selections do not carry across tabs.

Plan List Page

All pharmacies added on the Guided help pharmacy page are displayed on the Plan list page for MAPD and PDP plan types. Agents can toggle between each pharmacy to see the updated drug and total cost for each plan displayed. List of added pharmacies is also displayed under the preferences section with a flag for the primary pharmacy.

Plan Details Page

Similar to the plan list page, all pharmacies added on the Guided help pharmacy page are displayed on the Details page for MAPD and PDP plan types. Agents can toggle between each pharmacy to see the updated drug and total cost for that plan. Network coverage for each pharmacy is also displayed under the Preferences section on Details page. The prescription tier applicable based on the selected pharmacy is also highlighted.

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Compare Plans

Agents have the ability to toggle between selected pharmacies when comparing plans to see updated drug and total cost for the plans being compared. Network coverage for each pharmacy is also displayed under the Preferences section on Compare page.

Quoting

When sending a quote, agent can see a list of pharmacies added on the Guided Help Pharmacy page. Agent can select the pharmacy that best meets the beneficiary's needs and send a quote with costs based on the selected pharmacy. The selected pharmacy is saved as the Primary pharmacy on the beneficiary's profile. On the quote summary page, beneficiary will see the selected pharmacies, with a flag for the primary pharmacy, under the Preferences section.

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

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#	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: • 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. 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: • Preference Score • Plan Premium • Total Estimated Costs • Medicare Star Rating • Plan Name • Estimated Drug Cost
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 providers, prescriptions and pharmacy are covered, as well as estimated drug cost, total est. annual cost and health cost (depending on plan type).

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#	TASK	DETAILS
11	Add/Hide Special Needs Plans (SNP)	Click *Add all Special Needs Plans (SNP)* to display all special needs plans within the plan list. This link will change to *Hide all Special Needs Plans (SNP)* when plans are shown on the page. Filtering on these plans will become available after clicking the link to add plans.

Plans Link (Browse Anonymously)

It is strongly recommended to create a profile whenever working with a beneficiary so that information is saved, and the profile can be retrieved later. However, if a beneficiary does not want to give their name for a profile to be created, if this feature is enabled on the site then agents can search available plans before creating a profile.

#	TASK	DETAILS
1	Click Plans Link in Header	Agents can click the *Plans* Link from the header of any page to browse available plans for a coverage area. This will clear information and start a new session (see the three dashes indicating no profile is currently active).
2	Enter ZIP Code	Beneficiary must provide their ZIP Code to see plans available for the service area.
3	Shop for plans	Clicking *Shop for plans* will load the Plan List page as explained above in this document. Agents can enter preferences information and see all details about a plan.
4	Send quote	To send a Quote from this page, a Profile must be created so Agents are able to retrieve the information later. Enter the required fields and click Send quote. See **Send Quote from Plan List** section for more information on sending a Quote.

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.

Preferences ⌃

👤 Provider — (7) Add/edit providers list

Search Provider	Provider directory (8)
Platinum Surgical Center *Clinic/Center* 465 N Roxbury Dr Ste 1017 Beverly Hills, CA 90210	⊗ **Out of network**
Dr. Edgardo Antonio Falcon Jr. (PCP) *Dentist* 9201 W Sunset Blvd Ste 610 West Hollywood, CA 90069	✓ **In-network**

💊 Prescriptions — (9) Add/edit prescription list

Search Prescriptions	Prescription directory (10)
acetaminophen/codeine TAB 300-15MG 120 tablets per month	✓ **Covered**
Crestor TAB 10MG 30 tablets per month	⊗ **Not covered**

📍 Pharmacy — (11) Add/edit pharmacy

Search Pharmacy	Pharmacy directory (12)
CVS Pharmacy #02801 (primary)	✓ **In-network pharmacy with preferred pricing**
Mail order	✓ **Covered**

☰ Other Preferences — (13) Add/edit other preferences

Hearing	✓ **Yes** (14)
Dental	✓ **Yes**

Optional add-on coverage (available in cart) ⌃

Dental	Optional Supplemental Dental HMO plan **$11.60**	View details ⌄

#	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	Edit the provider list	This view includes information on which providers are in network or out of network for the plan. To edit providers, click the *Add/edit providers* link.
8	Provider directory	The provider directory link will be enabled if Provider search is available on the site or if an external URL is included in the plan data to perform a search for providers for the plan.
9	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.
10	Prescription directory	This link will open the Prescriptions tab where a search may be performed for covered prescriptions specific to the plan.
11	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.
12	Pharmacy directory	This link will open the Pharmacy tab where a search may be performed for covered pharmacies specific to the plan.
13	Edit other preferences	The plan details view includes information about other preferences that are included in the plan. To edit the preferences selected, click the *Add/edit other preferences* link.
14	Other Preferences	Details about which plan benefit selected in Other Preferences is included in 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*.

#	TASK	DETAILS
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*.
6	Review estimated drug costs and restrictions	Review drug costs by phase and restrictions for the selected plan. These amounts are calculated based on the plan's coverage.

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	Select effective date	Change the default effective date of coverage to see updated estimated costs.
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.

#	TASK	DETAILS
5	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.

Preferences ⌃

👤 Provider | | | Add/edit providers list

Search Provider	Provider directory	Provider directory	Provider directory
Platinum Surgical Center *Clinic/Center* 465 N Roxbury Dr Ste 1017 Beverly Hills, CA 90210	⊗ Out of network	No provider data for this carrier	No provider data for this carrier
Dr. Edgardo Antonio Falcon Jr. (PCP) *Dentist* 9201 W Sunset Blvd Ste 610 West Hollywood, CA 90069	✓ In-network	No provider data for this carrier	No provider data for this carrier

💊 Prescriptions

Search Prescriptions	Prescription directory	Prescription directory	Prescription directory
acetaminophen/codeine TAB 300-15MG 120 tablets per month	✓ Covered	✓ Covered	✓ Covered
Crestor TAB 10MG 30 tablets per month	⊗ Not covered	✓ Covered	✓ Covered

📍 Pharmacy

Search Pharmacy	Pharmacy directory	Pharmacy directory	Pharmacy directory
CVS Pharmacy #02801 (primary)	✓ In-network pharmacy with preferred pricing	✓ In-network pharmacy with standard pricing	✓ In-network pharmacy with standard pricing
Mail order	✓ Covered	✓ Covered	✓ Covered

☰ Other Preferences

Hearing	✓ Yes	✓ Yes	✓ Yes
Dental	✓ Yes	✓ Yes	✓ Yes

Optional add-on coverage (available in cart) ⌃

🦷 Dental	$11.60 View details ⌄ $40.50 View details ⌄	$15.00 View details ⌄	$15.00 View details ⌄

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#	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	Rider 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.

Cart

The shopping cart page displays the plan the beneficiary is intending to enroll in as well as the ability to add on riders for additional coverage.

#	TASK	DETAILS
1	View details/Change plan/Remove plan	View details – view benefits for this plan Change plan – takes user back to plan list page Remove plan – removes plan from the cart; takes user back to plan list page
2	Not a valid PCP message	This message appears when Provider Search is enabled on the site and the PCP selected by the user is not a valid PCP for the plan.

#	TASK	DETAILS
3	How will you be completing this form?	Send to beneficiary to sign and submit – Allows user to complete the enrollment up to the sign and submit page where the user will be able to forward the application to the beneficiary. Complete and submit form myself – Allows user to complete the enrollment form on behalf of the beneficiary.
4	Are you an existing member?	Selecting *Yes* will allow the user to complete a shorter enrollment form.
5	Continue to apply button	After completing required fields in the cart, user will be taken to the first page of the enrollment form.

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 consumer PlanCompare ONE 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 *Send Quote* button from the following pages:
    - Plan List
    - Plan Details
    - Compare plans

- Clicking on *Send quote* opens a modal that displays:
    - Beneficiary's name
    - Email of the beneficiary
    - Text 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

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Send Quote from Compare Plans

Send Quote Window

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Quote Sent Confirmation
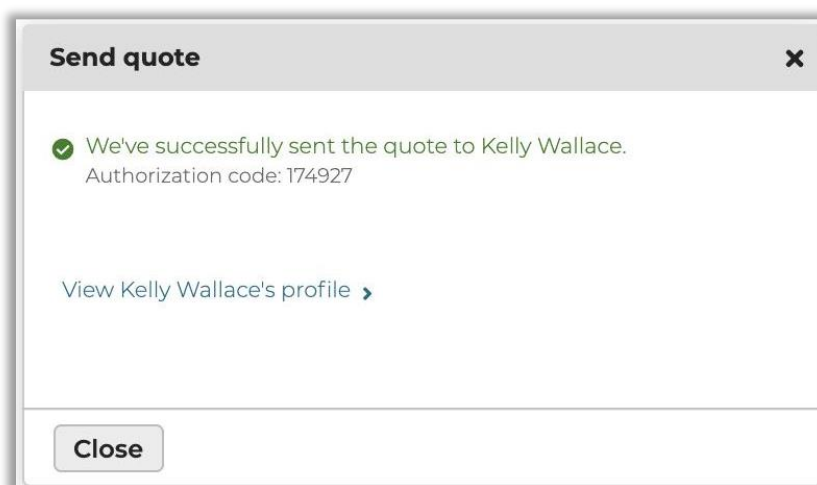
#	TASK	DETAILS
1	Add plans to quote	Select up to 3 plans to add to the quote from the plan list page
2	See plans included in quote	Agents can see the plans selected for the quote, up to 3 plans of the same plan type per quote.
3	Remove a plan from quote	Agents can remove a plan from the quote before 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	Phone number	When selecting text, enter the phone number for the beneficiary receiving the quote. The phone number on the profile will pre-fill if there is one available.
7	Customize your message	Agents can customize the message, which the beneficiaries will see when they authenticate into the site to view the quote.
8	Plan documents	For individual plan quotes, choose which plan documents to include in the quote.
9	Send quote	Click *Send quote* 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 any links that were selected when sending the quote:
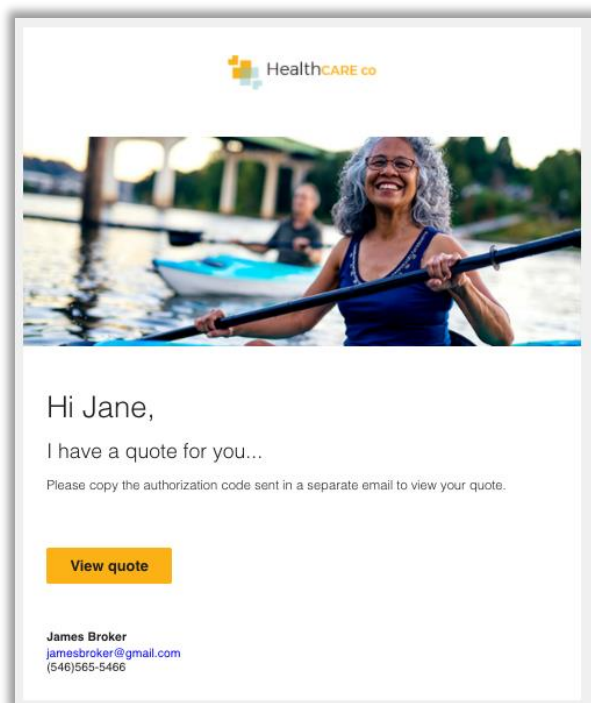
The second email contains a unique system generated authorization code which will be used to authenticate the beneficiary to view the quote:

PlanCompare ONE Professional
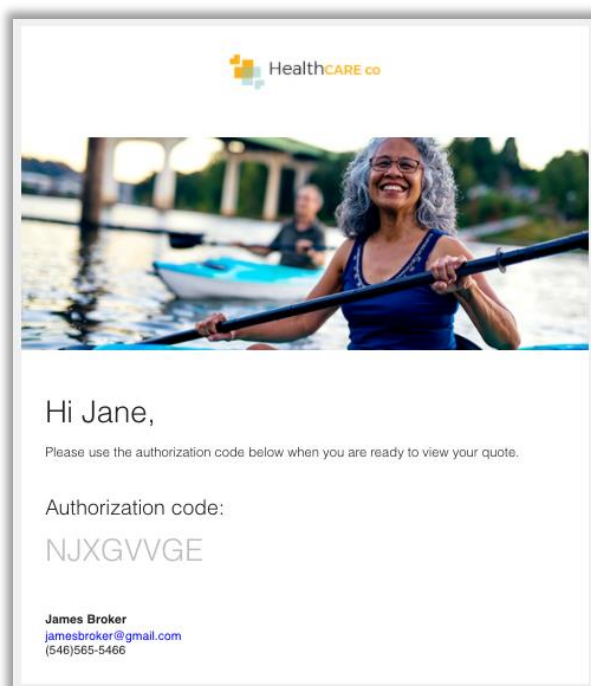
Beneficiary Quote Authorization

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.

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Beneficiary Quote Summary

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

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#	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	Quote sent	Displays the date the quote was sent as well as the email or phone number the quote was sent to. Quote sent date in PST.
2	Quote details	Displays plan type being quoted. If Med Supp plan was quoted, requested effective date will also be displayed here.
3	Authorization Code	Unique system generated authorization code for that quote
4	Custom message	Customized message included with the quote
5	Agent Details	Username and name of agent who sent the quote

Show Plans Agents Have Permission to Sell

Overview

This feature allows agents to view all plans available in a beneficiary's service area as if they were on the Medicare.gov site without having to leave the site. This feature will assist agents/brokers in guiding beneficiaries to best plan based on their situation.

Plan List Page

When this feature is enabled on the site, the *Add non-licensed plans* link will appear at the top of the Plan List page. The user may click to return all plans contained in the Public Use File (PUF). After the plans are displayed, a filter will appear for users to filter out the PUF plans and only plans the user is licensed to sell will appear in the plan list.

The PUF plans are available in the list to view plan details or compare against other plans. PUF plans are not available to be added to the cart and users may not enroll in them. Users may also not add these plans to a quote.

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#	TASK	DETAILS
1	Add non-licensed plans link	This area indicates to the user that they are not licensed to sell or quote this plan. These plans are available for the Compare feature.
2	Licensing Filter	Due to the high volume of plans that could be returned, users have the option to filter out non-permissioned/PUF plans by clicking the checkmark in this filter. This will only return plans the agent has permission to sell.
3	Not licensed to sell/quote	Users may view plan details or compare PUF plans with licensed plans. However, PUF plans will not be able to be added to the shopping cart and will be unavailable for enrollment.

Plan Details

When benefits are available for PUF plans, they will be displayed on the Plan Details page. Note: When the user has entered a pharmacy in Guided Help, the pharmacy will not display on PUF plans. This applies to both retail and mail order costs.

Compare Plans

As stated above, plans an agent has permission to sell, as well as non-permissioned/PUF plans, are available for a side-by-side comparison. Only plans that an agent is licensed to sell will be allowed to be added to the cart/enroll or added to a quote.

After clicking the *Send quote* button, note the plan in which the agent is not licensed to sell is not included in the quote.

Cross Sell – Medicare Supplement and Prescription Drug Plans

Overview

The Cross Sell feature allows customers to sell both Medicare Supplement and Prescription Drug plans together. The shopping cart must be enabled on the site to use this feature.

When this feature is enabled, the site will present a modal whenever the user adds either a Medicare Supplement or PDP plan to the cart. Users will then be able to enroll in these plans (based on enrollment rules for the plans).

When this feature is disabled, only one plan will be allowed in the cart at the time and there will be no cross promotion of these specific plan types.

Note: Cross sell is not available during the window shopping period. Users will still be able to enroll in Medicare Supplement plans, but not PDP during this time.

Plan List

When a PDP plan is added to the cart, but a Medicare Supplement plan has not, a modal will be presented to the user promoting Medicare Supplement plans. A modal will also be presented when the user has added a Medicare Supplement plan to the cart, but not a PDP plan, promoting a PDP plan.

When one of these plan types reside in the cart, the modal will not be presented to the user for that plan type.

Clicking the *Shop for plans* button will take the user to the plan tab that is being promoted.
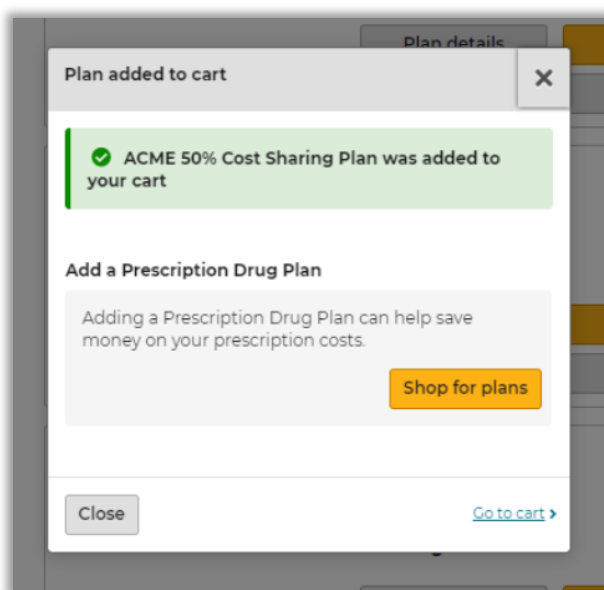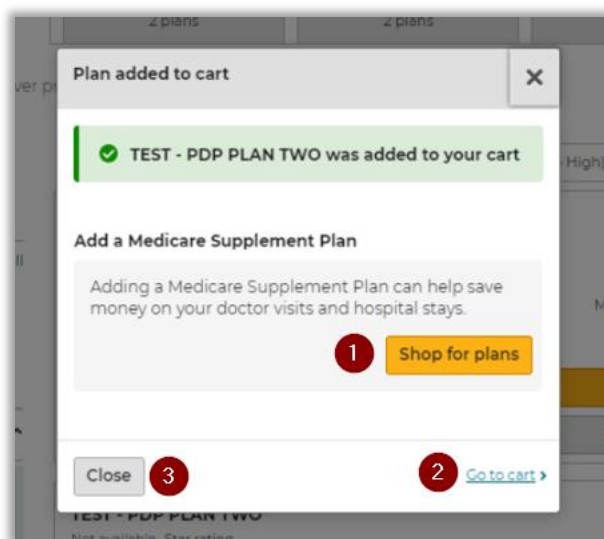
#	TASK	DETAILS
1	Shop for plans	Clicking this button will navigate the user to the plan type tab being promoted in the modal.
2	Go to cart	This link will navigate the user to the shopping cart with the plan that was just added on the plan list page.
3	Close	Clicking this button will close the modal and keep the user on the plan list page/tab for the plan that was added to the cart.

Cart

When a PDP plan is in the cart, but not a Medicare Supplement plan (and vice versa), a message will appear at the top of the cart promoting the plan that is not in the cart. This is the same message that was displayed in the modal on the plan list page. When both plan types are in the cart, users will not see the promotion messaging in the cart.

Clicking the *Shop for plans* button will take the user back to the plan list page and present the plans for that plan type being promoted.

If the user tries to replace the plan(s) in the cart with either a MA or MAPD plan, the Medicare Supplement and PDP plans will be removed from the cart and replaced by either the MA or MAPD plan.

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Promote Medicare Supplement plan –

Promote Prescription Drug plan –

#	TASK	DETAILS
1	Shop for plans	Clicking this button will navigate the user to the Plan List page, plan type tab being promoted in the modal.

Both plan types reside in the cart –

When both a Medicare Supplement and Prescription Drug Plan reside in the cart, the promotion message at the top of the cart will not display.

Enrollment

The Cross Sell feature is designed to drive users to enroll in plans where internal/hosted forms exist first. For example, if the PDP plan is internal enrollment and the Medicare Supplement plan is message only or external enrollment, users will be presented with the PDP internal form to enroll in first. Note: Both plans will be contained in the mini-cart located on the right side of the enrollment form. However, the plan the user is currently enrolling in will be listed first.

There is an exception to this rule. There is a configuration where users will be driven to external enrollment first. This configuration is disabled by default and must be enabled on the site to drive users to external site enrollment first.

Enrollment Confirmation

After enrolling in the first plan, the user will be informed that there is still a plan in the cart. Upon clicking *Continue applying for coverage* button, the site will determine if the remaining plan is hosted, message only or external enrollment.

- If hosted, the user will be directed to the first page of the enrollment form for the plan in the cart.

- If message only, the user will be presented a modal message on the enrollment confirmation page informing them how to enroll in the plan. The plan will remain in the cart until it is removed by the user.

- If external enrollment, the user will be launched to the external site. The plan will be removed from the cart upon launching the user to the external site.

#	TASK	DETAILS
1	Continue applying for coverage	This button will appear when there is another plan in the cart. Clicking this button will follow the rules outlined above.

Send to Beneficiary

The Send to Beneficiary feature is available in the cart with the Cross Sell feature. If the agent opts to send one plan to beneficiary and complete and submit the other plan, the enrollment for the plan the agent selected to complete themselves will be presented first.

When the agent selects send to beneficiary for both plans and the agent sends the enrollment to the beneficiary for the first plan, the *Send enrollment* modal will appear informing them there is another plan in the cart.

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After clicking *Continue applying*, the user will be navigated to the first page of the next enrollment that is in the cart. Once the second plan is sent to the beneficiary, the *Send enrollment* modal will appear as it normally does. Both plans will continue to appear in Enrollment history as partial enrollments.
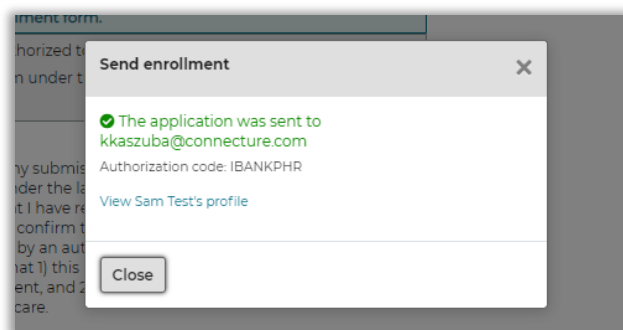
#	TASK	DETAILS
1	Continue applying	This button will appear when there is another plan in the cart. Clicking this button will follow the rules outlined in the Enrollment Confirmation section above.
2	Close	Clicking this button will close the modal and keep the user on the Submit page of the enrollment form.

Enroll a Beneficiary

Agent Complete Enrollment Application for Beneficiary

PlanCompare ONE for Professional's 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.

> **Note**: If the cart is disabled on a site, all buttons that would normally read as *Add to cart* will read as *Enroll*. Clicking this button will take the agent to the first page of the enrollment form instead of the cart. If cart is disabled, Send Beneficiary Application to Enroll feature (described below) is **not** available.

Send Beneficiary Application to Enroll (Email or Text)

If the beneficiary has chosen a plan to enroll in, the agent can send an application for a specific plan to the beneficiary by email and/or by text message.

> **Note**: If a plan is not available for consumer direct enrollment, agents will see a banner at the top of the cart indicating a plan is available for Professional enrollment only.

Agents can add a plan to the Cart and choose in the Cart if they are completing the enrollment by sending to the beneficiary or submitting the enrollment themselves. This question displays underneath the plan information and above the action bar with *Continue to apply*.

If Agent selects "*Complete and submit form myself,*" then on the last page of the enrollment form, they will see a *Submit* button. They will not see an option to send to the beneficiary. If they change their mind and DO want to send to beneficiary, they must return to the plan list page, add the plan to the cart again and choose the option to "*Send to beneficiary to sign and submit.*"

> **Note**: When changing from agent submission to beneficiary completing form, some information may be lost and will need to be re-entered.

If Agent selects "Send to beneficiary to sign and submit," they will fill out all required information for the beneficiary and find the *Send to beneficiary* button at the bottom of the last page of the enrollment form.

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#	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. **NOTE:** If agent changes their mind and wants to submit themselves, they need to add the plan to Cart again and choose the option in Cart to submit instead of send to beneficiary. This will start a new enrollment and information entered in the previous form may be lost.
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	Choose plan documents	When sending the application by email, agents can choose to include plan documents with the link to the enrollment application. Plan documents are not sent by text message. Plan documents are included in the email as a link.
4	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 and Text

This is the email and text message 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).
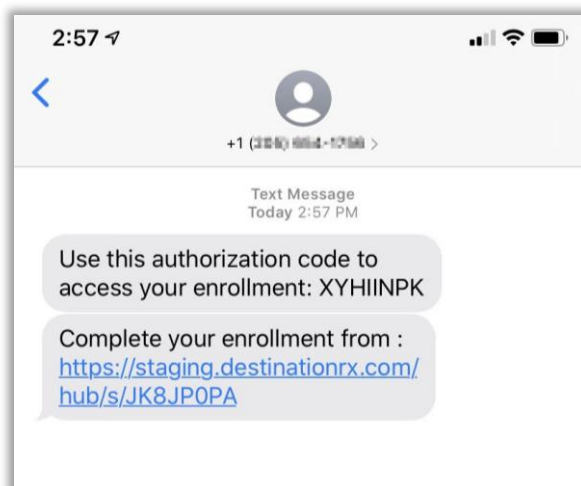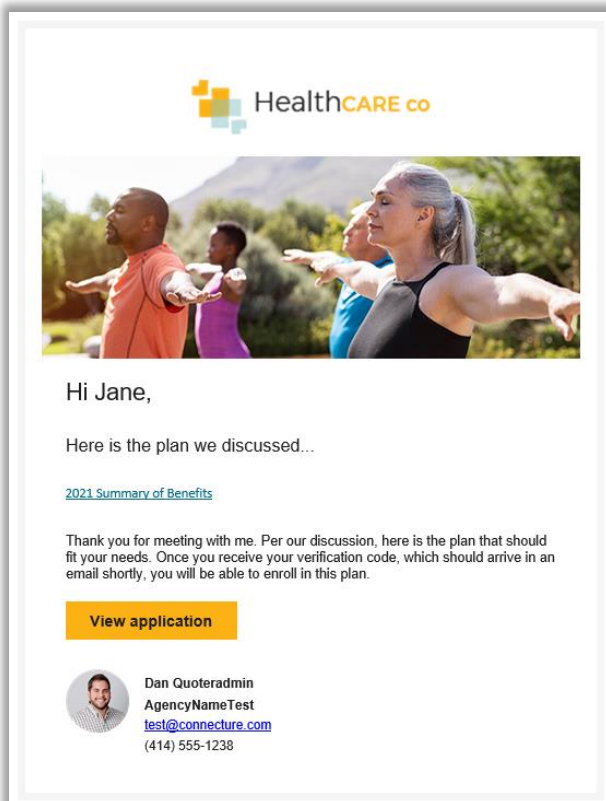
Beneficiary will open the enrollment application from the link and land on the last page of the enrollment form. They can review their information, make any necessary changes, and then sign and submit the application.

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.
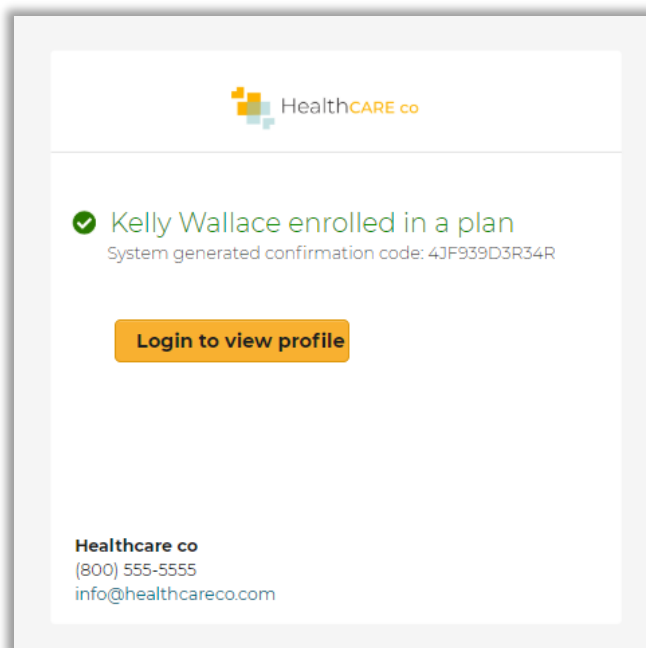
Enrollment History

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.

Enrollment history

Healthcare co choice 5000
last updated 03/06/2020 9:10am PST

Continue enrollment

Total monthly premium **$17.00**

Healthcare co choice value plus 5000
Submitted 11/04/2019 4:53pm PST **1**   Confirmation #123010243sdg   📄 View application **2**
Requested effective date 01/01/2020

📄 Proof of citizenship.jpg   📄 Loss of coverage.pdf   📄 End state renal disease.pdf

+ Dental 5000 + Vision 2000 rider

Total monthly premium **$3.10**

Healthcare co choice value plus 5000
Submitted 12/04/2018 3:26 pm PST   Confirmation #123010243sdg

Total monthly premium **$20.60**

#	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

If offered, the Medicare Supplement plan tab will appear on the Plan List page. When selected, agents will be required to answer a series of rate factor questions for the beneficiary prior to viewing plans and rates.

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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.

#	TASK	DETAILS
3	Condition tobacco question by state	Based on the state for the ZIP code entered and if Guarantee Issue applies, the tobacco question will appear below the GI questions. The state must be included in the configuration. States currently included are: AR CA HI IL IA KY LA MD MI MO NH NJ NC ND OH PA SC TN UT VA WI PY2021 – Tobacco question will appear in normal position after gender question. PY2022 - Tobacco question will be conditioned by state.

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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.

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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.

Drug, Pharmacy and Provider Search

The Drug, Pharmacy and Provider Search feature allows agents to bypass the shopping process and search for covered drugs, pharmacies, and providers for a specific plan.

This feature may be accessed by clicking this link in the footer:
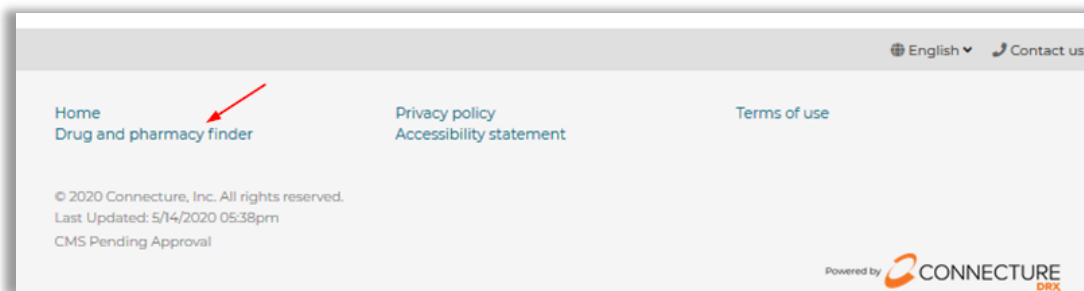
Plan List

Agents will land on the available plans page and need to enter a ZIP code:

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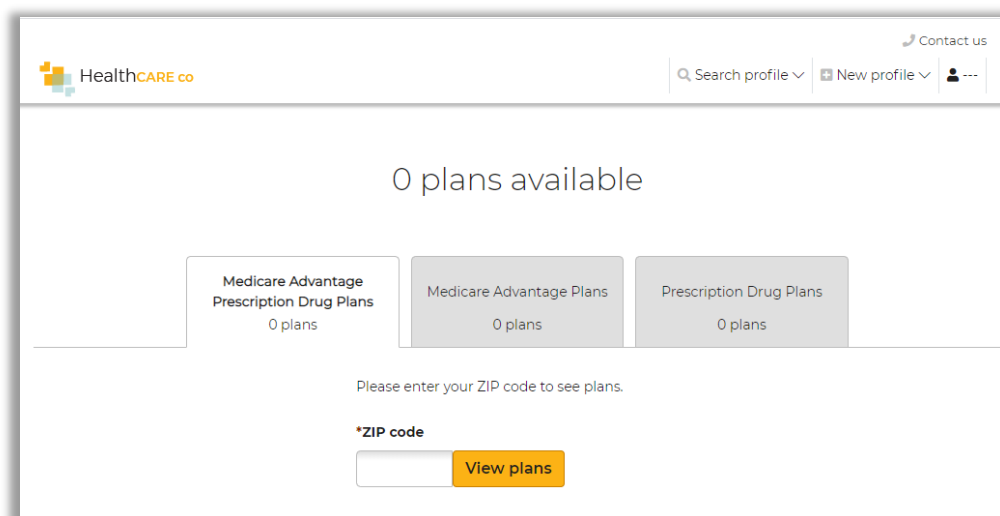
After a ZIP code has been entered, available plans will appear.
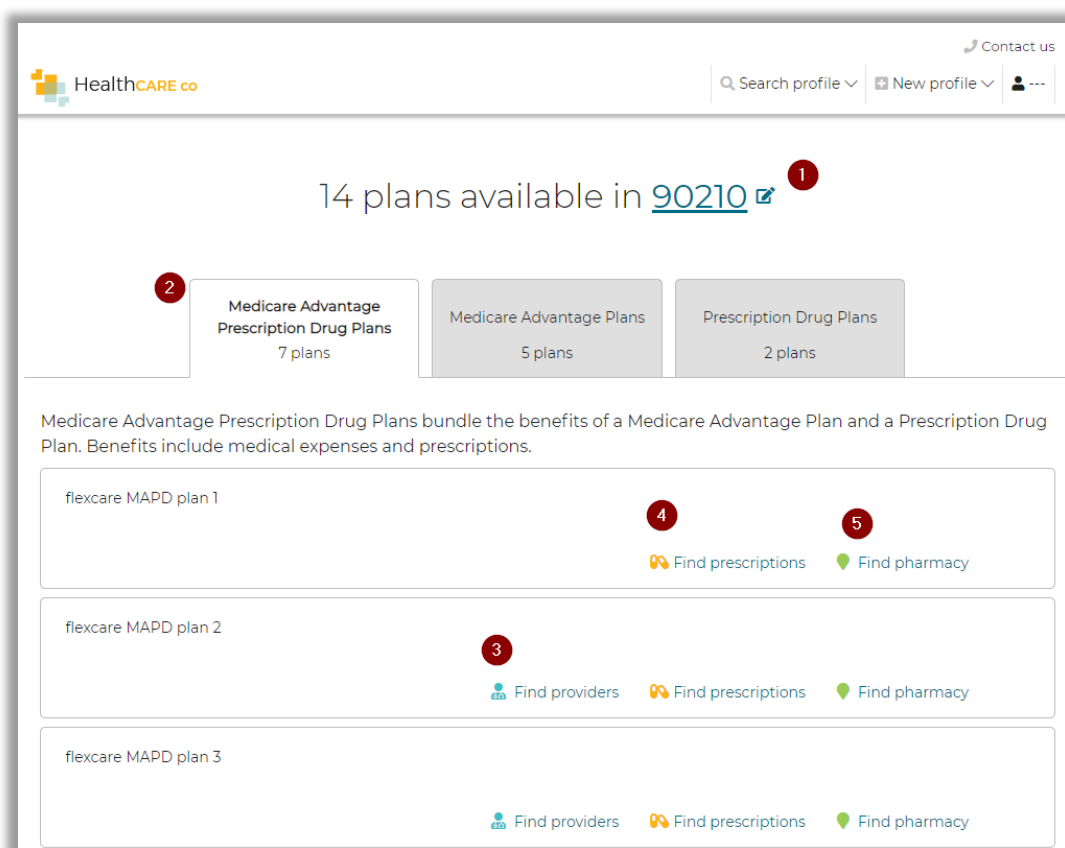
#	TASK	DETAILS
1	Edit ZIP code	Edit/update the ZIP code to reveal plans available.
2	Plan tabs	Plan tabs will display for all available plan types. **NOTE**: Medicare Supplement plans are not available to search for this feature.
3	Find providers	This link will open the Providers tab where a search mayb be performed for in network providers. If there is no provider feature for the site and an external URL is included in the plan data, a new page will open to perform a search for providers for the plan.
4	Find prescriptions	This link will open the Prescriptions tab where a search may be performed for covered prescriptions specific to the plan.
5	Find pharmacy	This link will open the Pharmacy tab where a search may be performed for covered pharmacies specific to the plan.
	Find dentists	This link will be enabled if an external URL is included in the plan data to perform a search for dentists for the plan.

CONNECTURE DRX

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Find Providers

Select a plan and click *Find Providers* for that plan in the ZIP code. Update the ZIP code or search for provider by name. Use the filters to filter on individuals or facilities.

#	TASK	DETAILS
1	Change ZIP code	Enter a different ZIP code to review in-network providers in that area.
2	Provider name search	Search for specific providers by name
3	Filter results	Filter by individual or facilities to find specific providers
4	Zoom in/Zoom out	Use the + or – to zoom in and out of the map.
5	Pagination	If there are more than 10 providers, click on page numbers to advance the list to the next or previous page.

Find Prescriptions

Select a plan and click *Find Prescriptions* for that plan. Search for the drug by name. Upon typing the name, a list of drugs will appear. Select either the drug name from the drop down or click the search icon.

NOTE: Agents may only search for one drug at a time. Drugs may not to be added to the beneficiary's medicine cabinet in this process. This can be done on the main site. See the Prescriptions section in this document above.

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#	TASK	DETAILS
1	Medicare plans	Click this to navigate back to the plan list.
2	Select dose and form	Select the dosage and the form of the drug.
3	Enter quantity and frequency	Enter the quantity and select the frequency of the drug.
4	Generic vs Brand selection	Select Yes for the direct generic form of the drug or No for the brand form.
5	See if this drug is covered	After making the selections above, click this button to see if the drug is covered and reveal pricing specific to the plan.

Drug Coverage Results

After clicking the *See if this drug is covered* button, the drug will appear in the appropriate tier along with costs associated with the tier. Footnotes associated with the drug will appear below the table.

NOTE: Drug pricing will appear if it is enabled for the feature.

Direct Generic Example

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Brand Example

Restrictions

#	TASK	DETAILS
1	Search prescriptions	Enter another drug name here to search for a different drug.
2	Edit drug	Return to the results page for this drug to edit dosage, quantity, frequency, or switch between brand and generic.
3	Restrictions	Hover over each restriction designation to reveal a description of each restriction.

Find Pharmacy

Click the Pharmacy tab to review in-network pharmacies within the ZIP code.

#	TASK	DETAILS
1	Change ZIP code	Enter a different ZIP code to review in-network pharmacies in that area.
2	Preferred in-network Standard in-network	Pins are color coded to indicate if the pharmacy is designated as Preferred in-network or Standard in-network. Click on the pins on the map to view the name of the pharmacy and the address. Pins correspond to the list on the left side of the map.
3	Zoom in/Zoom out	Use the + or – to zoom in and out of the map.
4	Pagination	Click on page numbers to advance the list to the next or previous page.

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.
4	Agent Picture	If the agent picture feature is turned on for the site, agents can upload a .gif .png . jpg that is less than 5 MB. This picture will be included in communications to beneficiaries like the email signature and on the authorization code page to view a quote or enrollment application.

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). Beneficiaries will be able to shop for only the plans the agent is licensed to sell. 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.
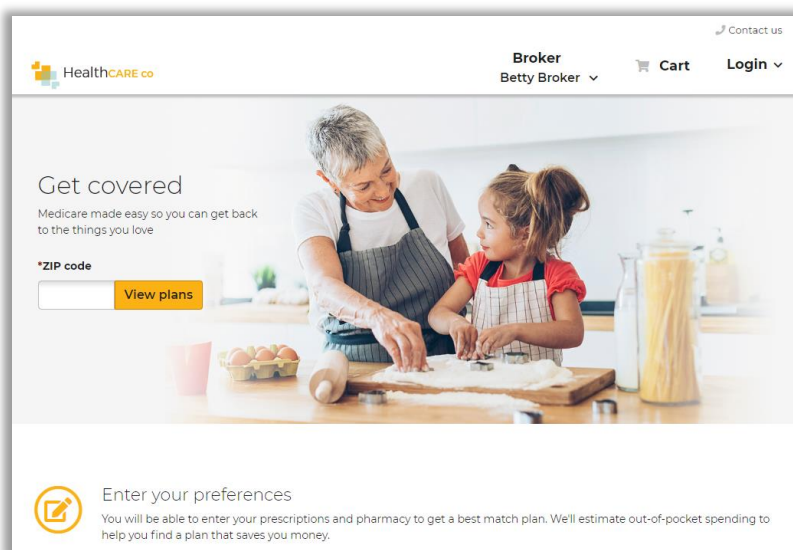
If the agent sent their Shopping Link to a beneficiary and the beneficiary enrolled in a plan, the agent will receive an email notifying them of the enrollment. To receive this notification, the
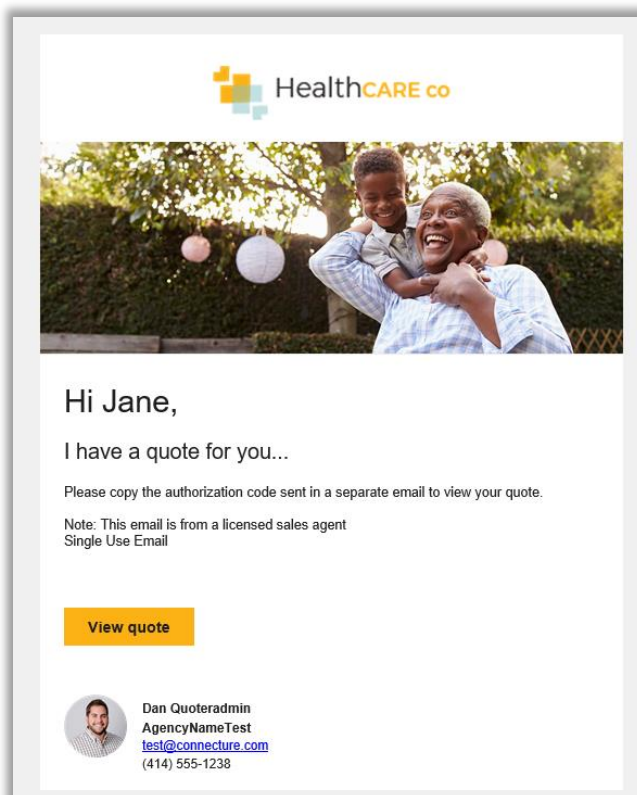
email must be turned on for the site and the agent must have a valid email address in their account.
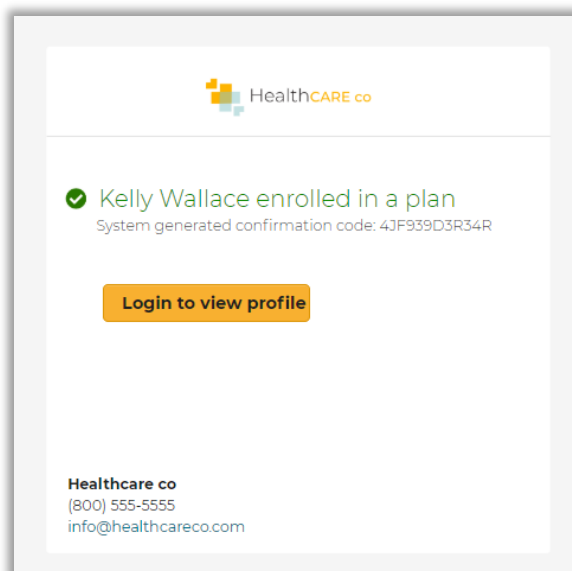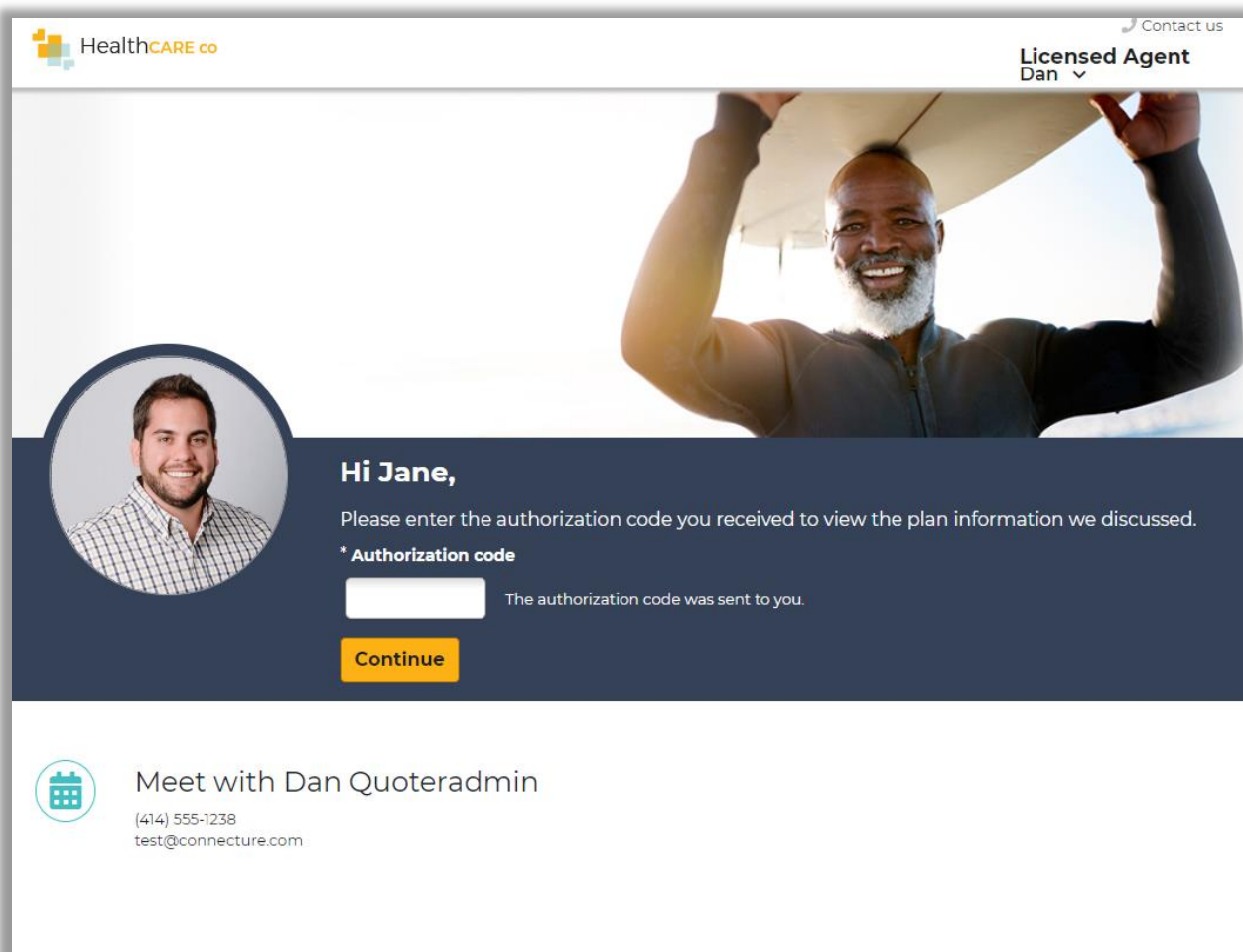

Agent Picture

Agents can add a picture on their account overview page. This picture will be included in their email signature and other communications to the beneficiary.

When an email including the email signature is sent, it will include the picture:

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When the beneficiary clicks the link in the email to open a quote or enrollment application, they will see the agent picture on the page where they enter the authorization code:

Admin User Functionality

PlanCompare ONE for Professionals users with administrative permissions have access to additional functionality. Additional functionality includes:

- Create new agents
- Search agents
- Edit agent accounts
- See all profiles within the system
- Search beneficiary profiles based on agent assignment

Create Agents

Admin users can create new agents. The *New profile* link in the global header opens a dropdown that allows admin users to select which profile type they want to create:
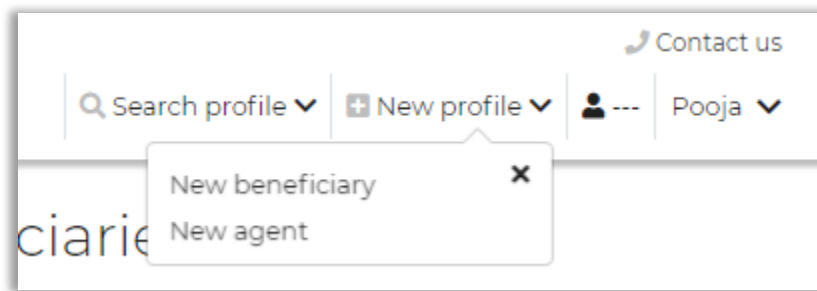
- *New beneficiary* navigates to new beneficiary profile page. See New Profile section above in this document for more details
- *New agent* navigates to the create agent account page

Create account allows agents to create new agent profiles by providing personal and account information for the new agent.

> **NOTE**: Agent selling permissions need to be loaded with the ASP/ALP file and cannot be created or edited from the Account Overview page for an agent.

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| #	TASK	DETAILS
1	Personal Information	Enter the agent's personal information. The required fields are marked with an asterisk (*).
2	Account information	Enter the agent's account information. The required fields are marked with an asterisk (*).
3	Save	Saves profile if all validations are met and navigates to Account Overview page of the newly created agent where admin user can edit the agent's profile

Search Agents

Admin users can search for agent profiles. The *Search profile* link in the global header opens a dropdown that allows admin users to select which profile type they want to search:
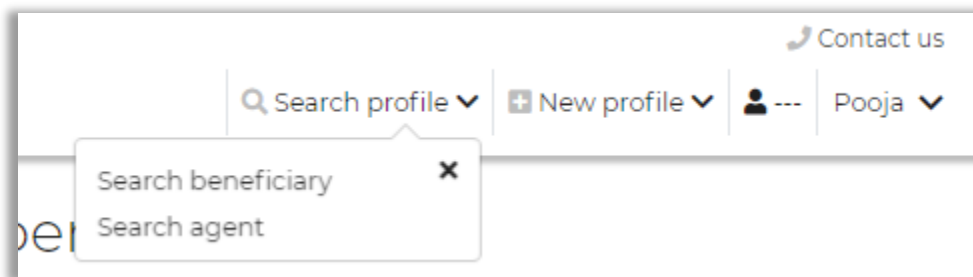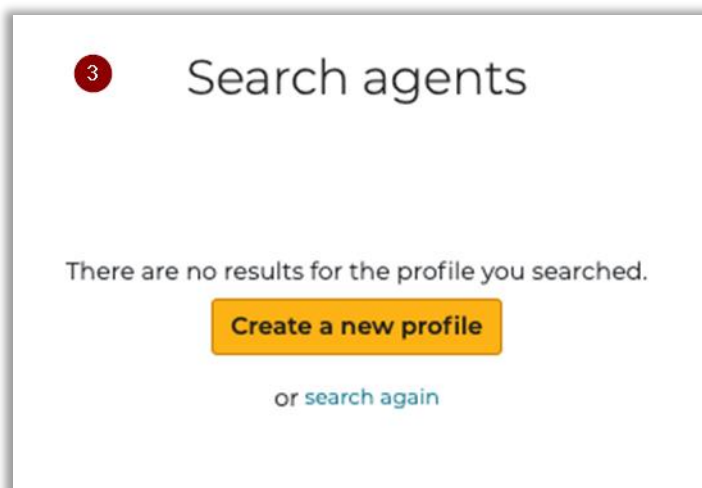

- *Search beneficiary* navigates to search beneficiaries page. See Beneficiary Profile - Search Profile section in this document for more details

- *Search agent* navigates to Admin user to the search agent page. Admin user can fill in the search criteria and click on Search profiles to view search results

#	TASK	DETAILS
1	Enter search criteria	To search for a specific profile, enter the agent's information in the search parameters. Admin user needs to enter information in at least one field with minimum 2 characters. However, entering more information will assist in narrowing the search. To find the agent profiles that match the search parameters entered, click *Search Profiles*.
2	View search results	Agent search results are displayed in alphabetical order of agent last name. Clicking on agent name navigates admin user to the account overview page of that agent. Search results display: Agent first and last name Username Active/Inactive status Indicator if agent has access to that site or not.
3	No search results	If the search criteria do not match any agent information, no results message and option to *search again* is displayed

Account Overview for Admin Users

Admin users can edit their own and other agent's account information. Admin users can view and edit additional fields that non-admin users do not have access to.

#	TASK	DETAILS
1	Personal Information	Admin users can edit all fields in this section.
2	Account information	Admin users can access view additional fields like Agency Name, Agency ID, Agent ID, Account Status, Site access and Expiration date

Roles and Permissions

The table below describes the user roles and associated permissions available on PlanCompare ONE for Professionals. These are general access permissions. Individual agent permissions to sell plans in a multi carrier setting are defined elsewhere.

ROLE	PERMISSION
Quoter	May create and view all prospect profiles.
Quoter_Broker	May create and view own profiles.
Quoter_Admin	May create/view profiles on all agent and agency accounts.
Enroller	May create/view all prospect profiles on all accounts and enroll.
Enroller_Broker	May create/view own prospect profiles and enroll.
Enroller_Admin	May create/view all prospect profiles on all agent and agency accounts and enroll.