



Proudly Introducing

# Agility's Medicare Quoting & Enrollment App



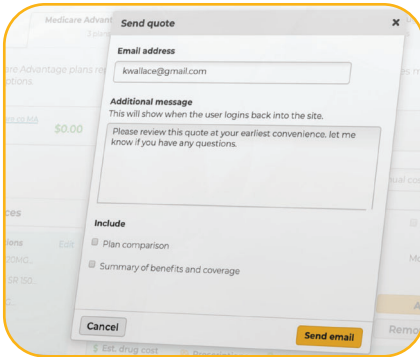
**Fast, Simple & Secure  
Quoting & Enrollment.  
Electronic Scope of Appointments.  
Direct Shopping Link.  
Telework Guide.  
Text to Sign.  
And Much More...**



## AEP 2021

# Telework Technology Tip Fast. Easy. Secure. Quoting

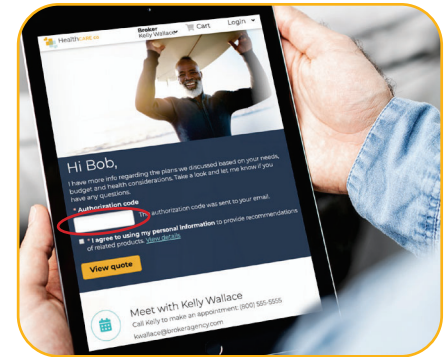
Select up to **three plans** to send to a beneficiary at one time. You can also include a personal note with **Quoting**.



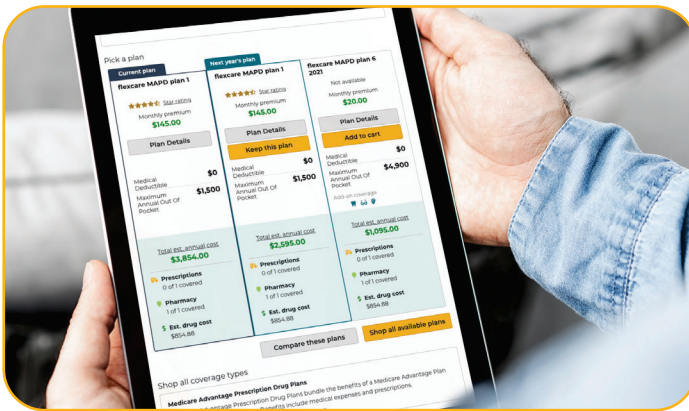
**1.** Once a profile is created, an agent can send a quote with up to three plans (of the same type) at a time.



**2.** For security purposes, the beneficiary will receive two emails. The second email includes their authorization code necessary to view the quote.



**3.** Beneficiary will copy and paste the code from the second email into a landing page from the first email and click “view quote”.



**4.** Beneficiary will review personalized plans to select their best fit plan and complete their enrollment electronically.



**5.** Agent will receive confirmation that beneficiary has enrolled in a plan.



**Agent will always receive credit for the sale through Quoting.**

## AEP 2021

# Telework Technology Tip

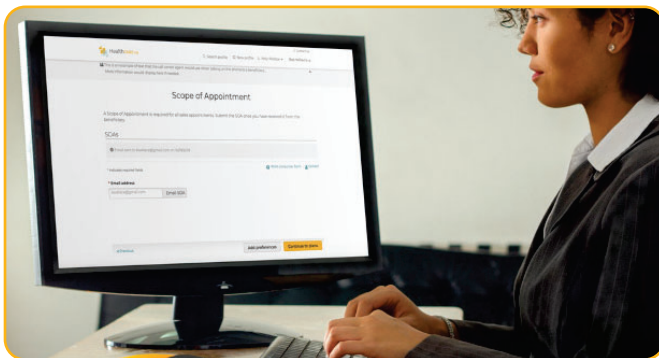
## Stay fully compliant while teleworking with our **Electronic Scope of Appointment**

**Scope of Appointment is a CMS requirement. An insurance agent must obtain a Scope of Appointment from beneficiaries to discuss only those Medicare products agreed upon in advance.**

Completing a SOA online is quick and easy:

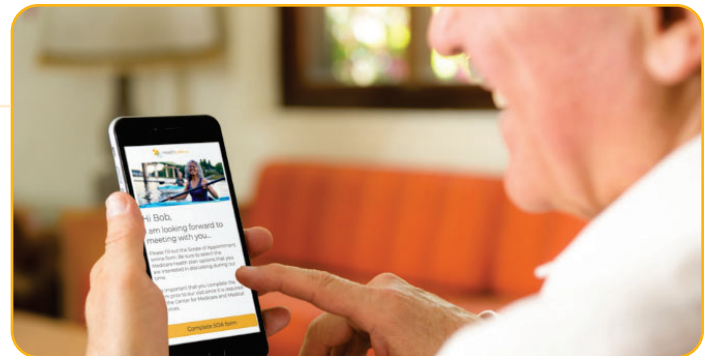
- Use our SOA capabilities to stay fully compliant
- Text or email to sign a SOA - engage your beneficiaries the way they want to engage
- Store completed SOAs on the beneficiary profile and retrieve in the future

### Easily connect with beneficiaries to complete a SOA



Send **text or email** to beneficiaries to complete SOA prior to meeting.

Each beneficiary will receive a **text or email** with a request to complete the SOA on their laptop, phone or tablet.



#### Scope of Sales Appointment Confirmation Form

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

Fields marked with an asterisk (\*) are required.

\*Please check one or ALL the product(s) below that you want the agent to discuss.

- Stand Alone Medicare Prescription Drug Plans (Part D)
- Medicare Advantage Plans (Part C) and Cost Plans
- Medicare Supplement (Medigap) Products
- Ancillary Products.

[View complete Medicare product descriptions](#)

#### Beneficiary or Authorized Representative Information

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

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

Beneficiary's First Name

Beneficiary's Last Name

Address (Line 1)

Address (Line 2)

City

State

Zip Code

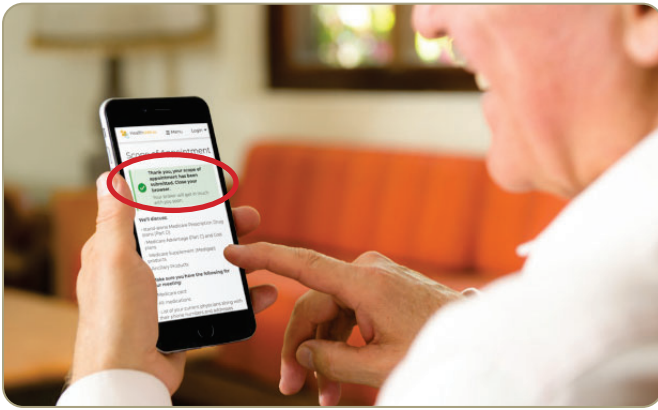
Phone Number

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

Yes  No

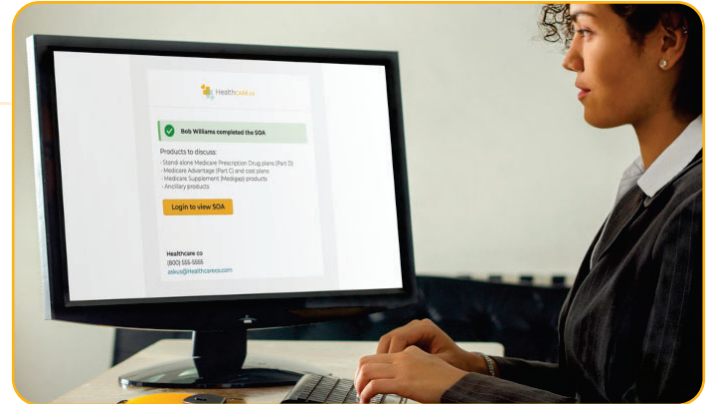
By checking this box, I have read and understand the contents of the Scope of Appointment form, and that I confirm that the information I have provided is accurate. If submitted by an

The beneficiary will check off the products they want to discuss, such as Medicare Advantage plans, Medicare Supplement plans and ancillary products, among others.



Beneficiary will see their SOA has been submitted.

Agent will receive notification of the completed SOA and can log on to view details of the SOA.



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

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

\*Agent First Name

\*Agent Last Name

Broker

Agent Phone

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


\*Initial Method of Contact


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

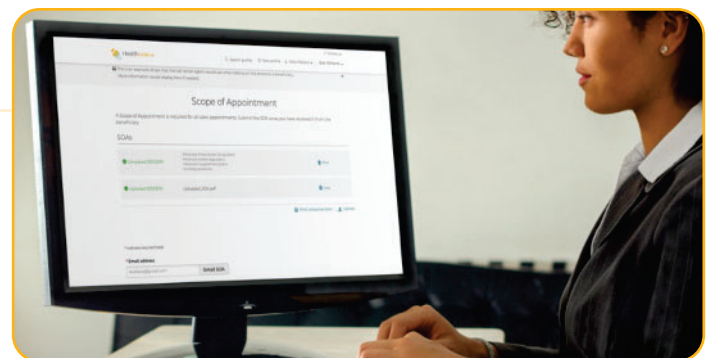
\*Plan(s) represented during this meeting:  
 Medicare Prescription Drug Plans  
 Medicare Advantage Plans

Agent will see those products the beneficiary wants to discuss, along with any updates. At this point, the agent also fills out their portion of the SOA form.

After the agent completes the SOA, the process is finished. The agent can begin to enroll the customer in their best fit Medicare plan.

 **Tip:** Agent can download the completed SOA as a PDF once it's been completed by both parties.

 **Tip:** If the carrier has a custom form, the completed form can be uploaded to store on the beneficiary profile to retrieve in the future.



**Stay compliant while working from home with our Electronic Scope of Appointment.**  
**It's that easy!**



## AEP 2021

### Telework Technology Tip

# Increase Self-Service Enrollments with your **Shopping Link**

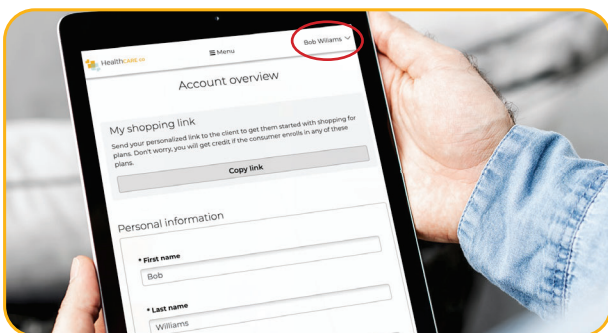
**Your Shopping Link is your own Personalized URL, a highly effective marketing tool used to direct consumers to a self-service experience that connects agents to every enrollment.**

Send your system-generated Shopping link via email or include in social media for beneficiaries to shop and enroll on your agency's website.


### Benefits of your personalized Shopping Link:

- Supports telework as both agents and beneficiaries can do everything electronically
- Connects beneficiaries to your Book of Business
- Displays only those plans on the shopping site agents are licensed to sell
- Encourages self-service enrollments when beneficiaries can see all plans an agent is licensed to sell
- Allows beneficiaries to reach out with questions, as agent contact info is on every page

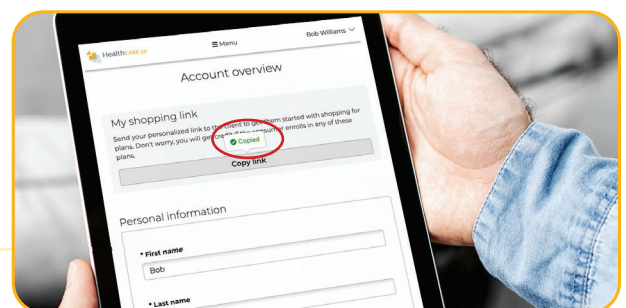
### Where to find your Shopping Link and how to use it:



**1.** After logging on to the portal, navigate to the upper right-hand corner to find your name. Click YOUR NAME and then ACCOUNT OVERVIEW.


 **Tip:** Agents can access their account in the upper right corner from every page.

**2.** Click COPY LINK. This link is automatically generated by the system and is unique to you.

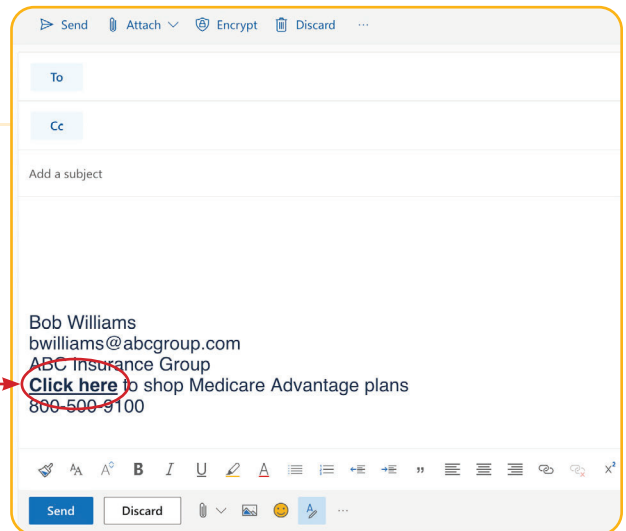
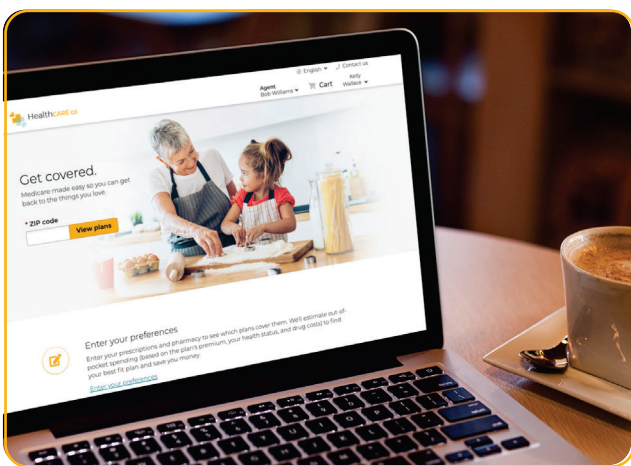


**3.** Once you have COPIED your Shopping Link, you can PASTE it into an email to send to beneficiaries with a personal note. Since your Shopping Link belongs only to you, it will connect you to every enrollment.

4. Turn your Link into TEXT and make it a hyperlink to direct beneficiaries to your agency's website.


 **Tip:** There are many ways to include your Shopping Link in your communications and social media. Add the link to your email signature, and it will automatically be included in every email.

### Add your Shopping Link here.



Your Shopping Link directs the beneficiary to your agency's website for their self-service experience

5. Each beneficiary will be directed through this link to shop and compare plans, and easily enroll in their best fit plan.

 **Tip:** If you are in any type of discussion with a beneficiary, then quoting, along with a SOA should be used. The Shopping Link (or Personalized URL) is used to direct beneficiaries to self-serve on your agency's web site.

6. Once a beneficiary has completed their enrollment, you will receive an email notification, so you can log on and see the details of any enrollments submitted through your shopping site. Your online Book of Business will automatically update with enrollment information under each beneficiary's profile.



### Self-service enrollment success!

- Email confirmation of enrollment received in your inbox
- Book of Business updated with enrollment
- You get credit!

## AEP 2021

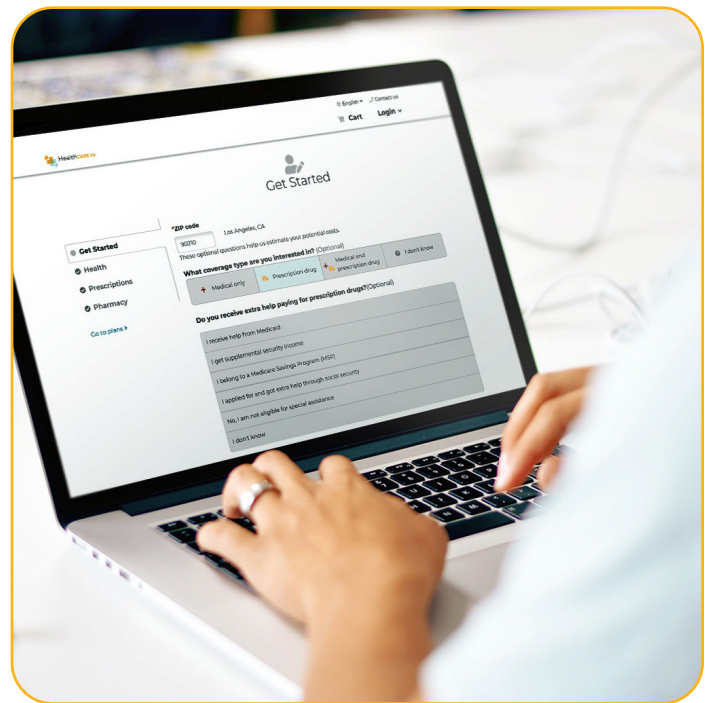
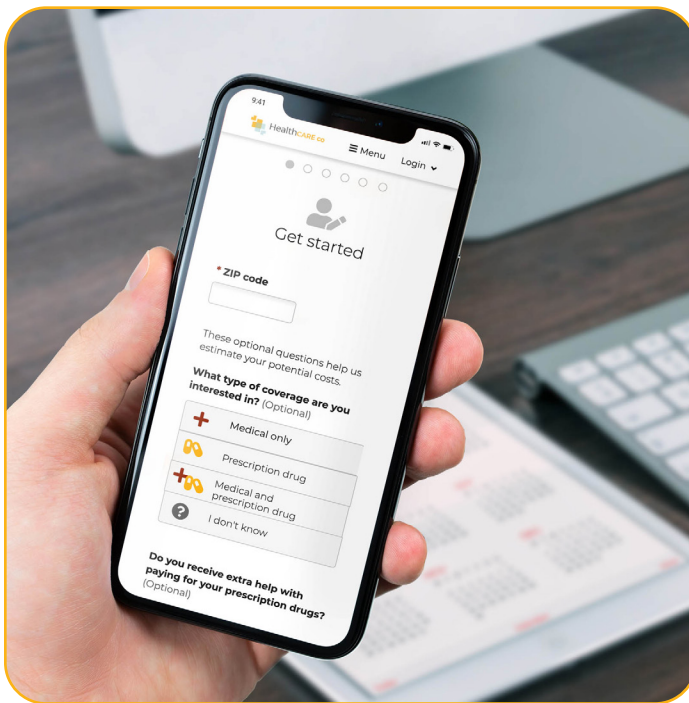
### Telework Technology Tip

# Using **Guided Help** to Deliver the Most Accurate Cost Estimates

Guided Help gives agents and beneficiaries the option of adding preferences for a more personalized shopping experience, along with the ability to see the most accurate cost estimates for every plan option.

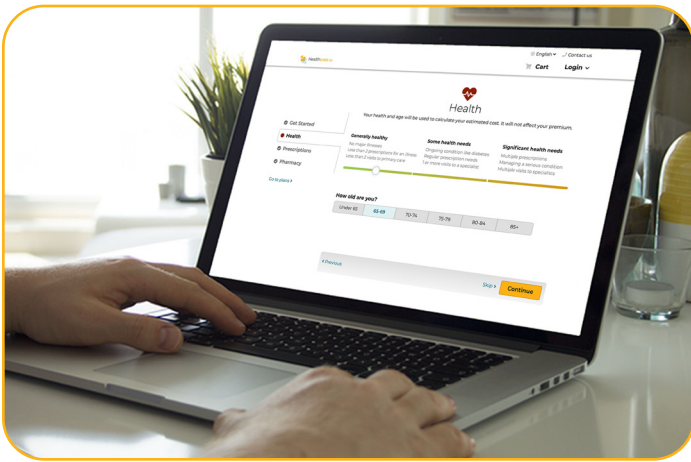
From the Get Started page, the following can be added:

- Health Status
- Age
- Subsidy eligibility
- Prescriptions
- Pharmacy



**Tip:** Did you know you can select up to **three plans** to send to a beneficiary at one time with **Quoting**, and include a personal note as well? With **Quoting**, agents always receive credit for the sale.





## Estimated Annual Costs help find the Best Fit Plan

Upon adding preference information, beneficiaries (and agents) will see plans available in their zip code along with estimated annual costs.

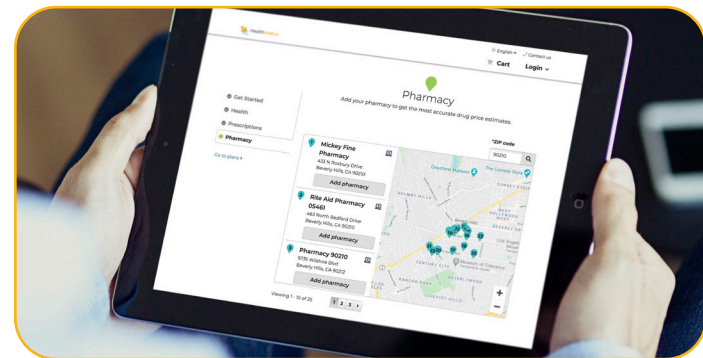
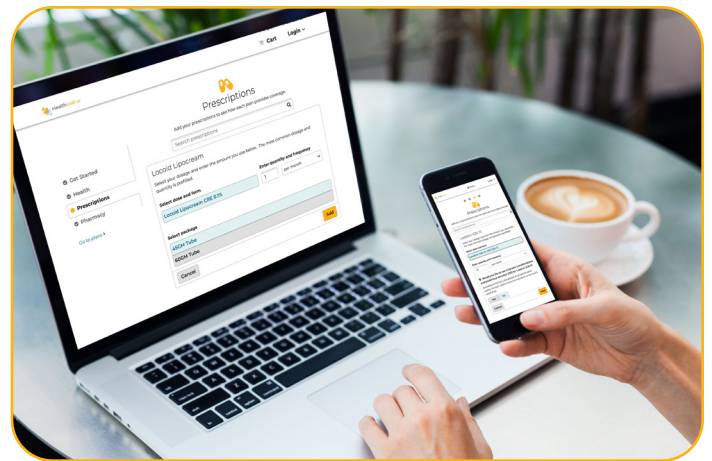
Estimated costs include drug costs, premium and estimated health costs. These costs are highlighted on the Plan Cards with details shown on the Plan Details view.

## Build a Medicine Cabinet

In addition to health status, age and subsidy qualification, beneficiaries can also build a medicine cabinet with their current prescription drugs to see costs associated with all plan options.

Once they add a drug, beneficiaries can:

- Select dose/form, quantity and frequency
- Change to a direct generic, if available
- See if their drugs are covered by a plan



## Choose a Pharmacy

The Interactive Pharmacy Map shows all pharmacies in a given zip code.

Beneficiaries can see if their pharmacy is in-network, standard/preferred or out-of-network for a particular plan with details shown on the Plan Details view.



**Tip:** Our drug pricing is based on **local pharmacy pricing** and is the most accurate in the industry. Since no cost averages are ever used, beneficiaries will always get the most reliable **out-of-pocket estimates**.

**AEP 2021**

# Text to Sign a Scope of Appointment

Engage seniors by offering the flexibility of completing a SOA on their phone

## Available for agents to:

### Stay Compliant

The electronic Scope of Appointment is a CMS requirement that protects seniors by ensuring agents only discuss products seniors have approved in advance to discuss. Easily document appointments to review those Medicare products approved by seniors.

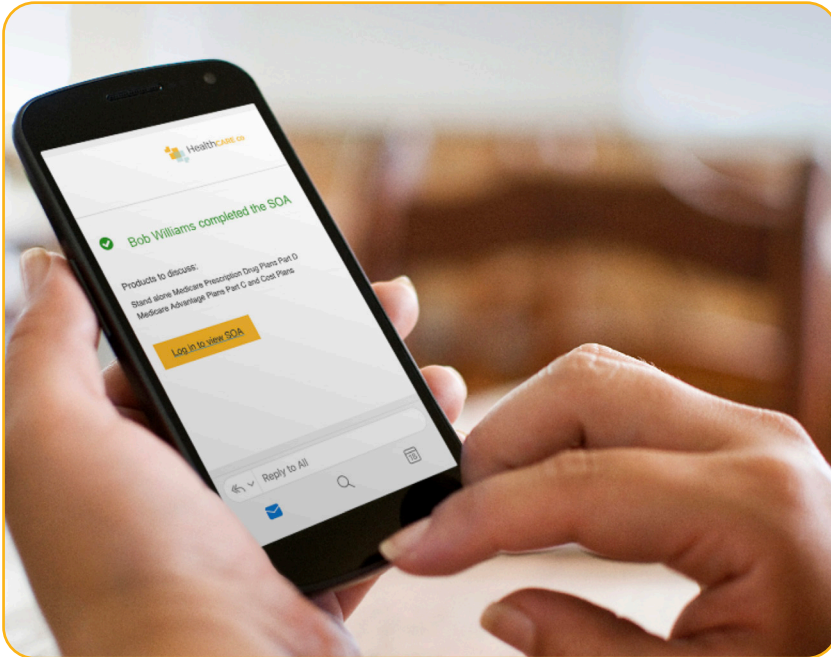
### Connect with seniors wherever you are, at any time

Let your customers decide how they want to access their Scope of Appointment. Send a link via text or email for seniors to complete and sign their SOA.

Send link via text for seniors to complete their Scope of Appointment.



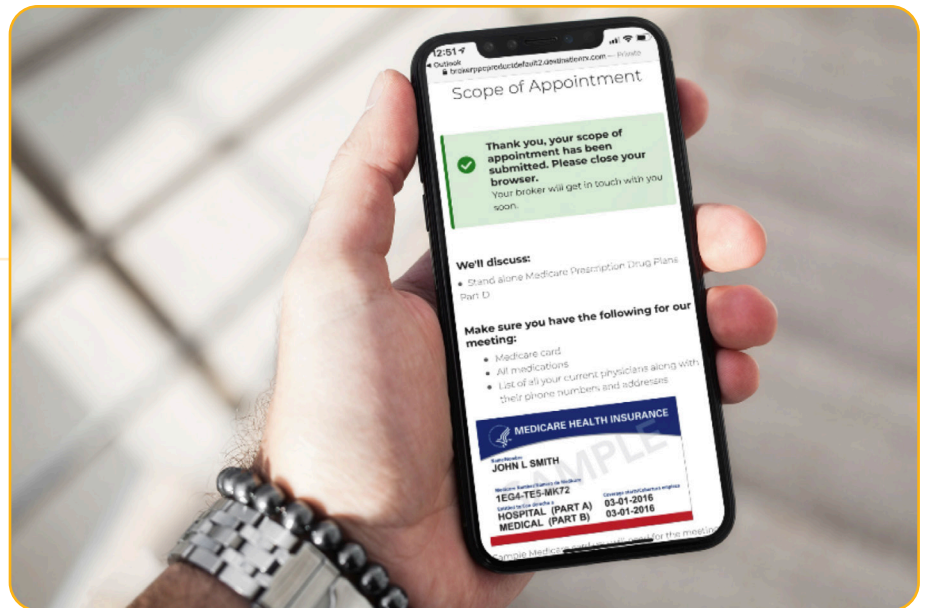
**TIP:** Download completed PDFs to print. Add or upload SOAs and store completed forms on the beneficiary profile to retrieve in the future.



Agent receives confirmation that beneficiary has signed their SOA.

This lets the agent know they can now complete their portion of the SOA.

Beneficiary receives confirmation SOA has been submitted.



Telework Technology Tip

Powered by  CONNECTURE  
DRX

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# MyAdmin

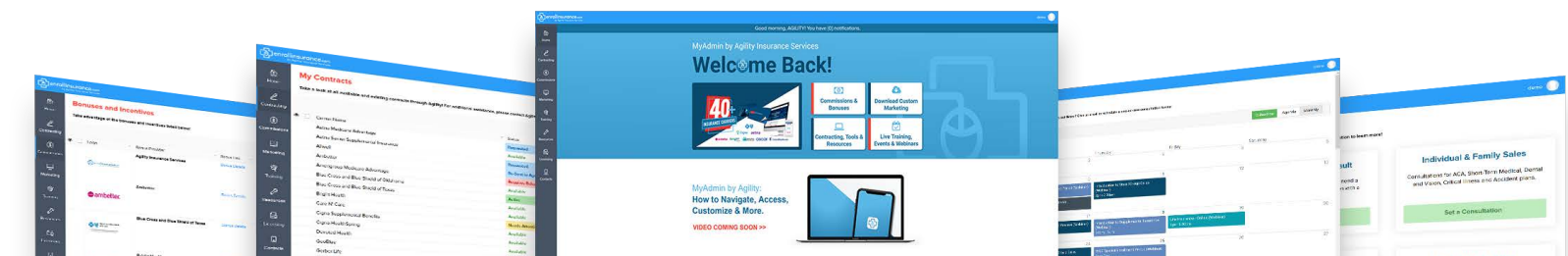
And we're just getting started...

As an Agility life & health insurance agent, you can now access our Medicare Quoting & Enrollment App and HealthSherpa ACA Enrollment platform all from within your personalized **MyAdmin Account**.

You can **Register** or **Sign In** now at **enrollinsurance.com** to get started. Our new, game-changing, all-in-one personalized and secure back office. User friendly, mobile ready and geared for professional life and health insurance agents across the country. Access, personalize, download, save and beyond:

- Medicare Quoting & Enrollment
- HealthSherpa ACA Enrollment
- Secured & Personalized
- 40+ Top Carriers for Contracting
- Marketing & Resources
- Training & Support
- Webinars & Events
- Commission Reports
- Available Bonuses
- Downlines & Contracts

Yours 100% Free. Forever. Because without you and your success, there's no us.



(866) 590-9771

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Richardson, Texas

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