Medicare CENTER

MedicareCENTER

Professional User Guide

Time is your most important resource.

Especially during Annual Enrollment Period

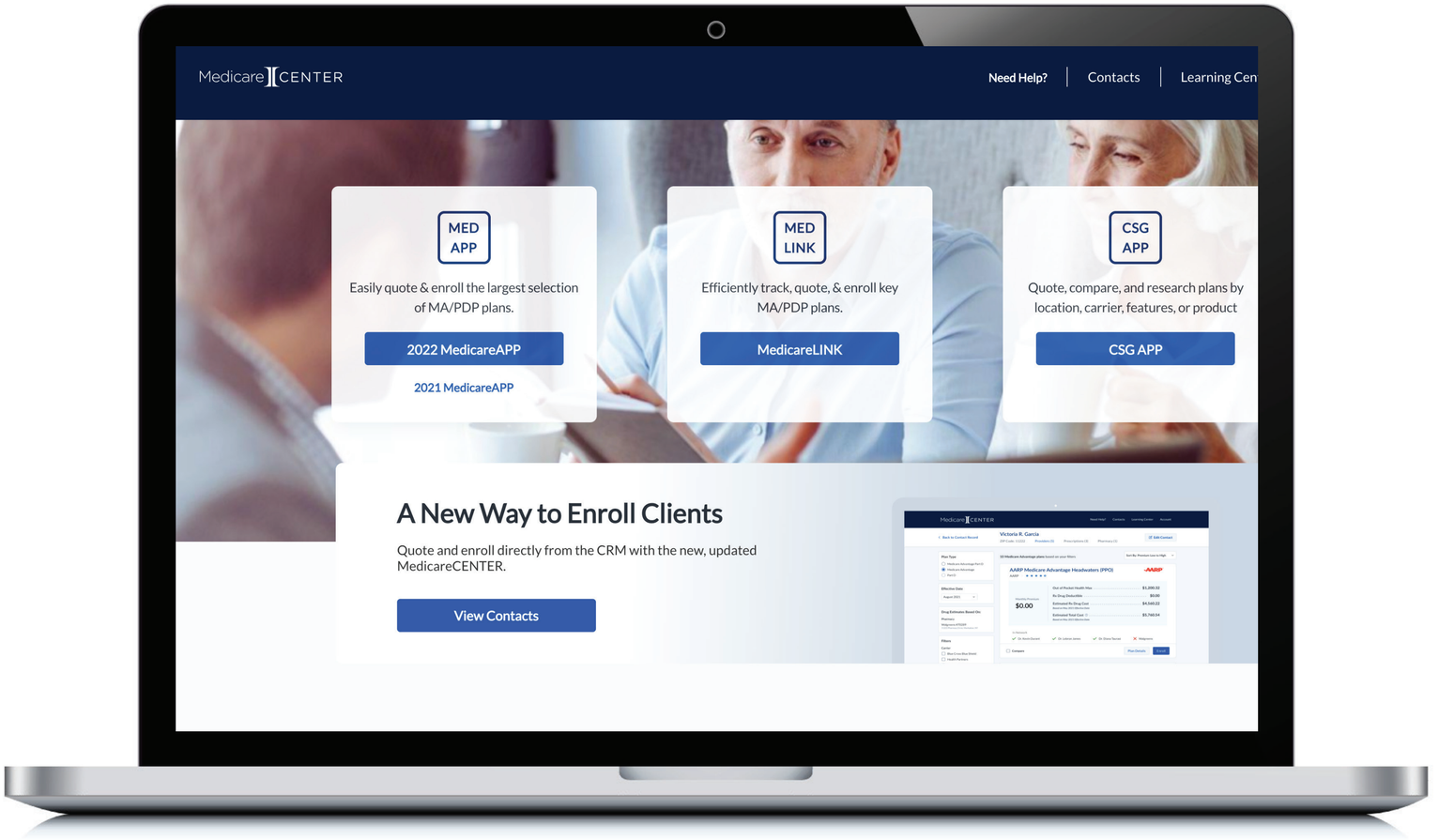
You are pulled in many directions…
Get SOA Signed
Manage Client Lists
Talk to Clients
Answer Questions
Manage Leads
Get on the Phone
Logins
Quote
Stay Compliant
Build Relationships
Monitor Carriers
Plan
Address Concerns
Track
Track Success
Progress
Produce

How can you spend more time
on what matters,
and less time on “busy work”?

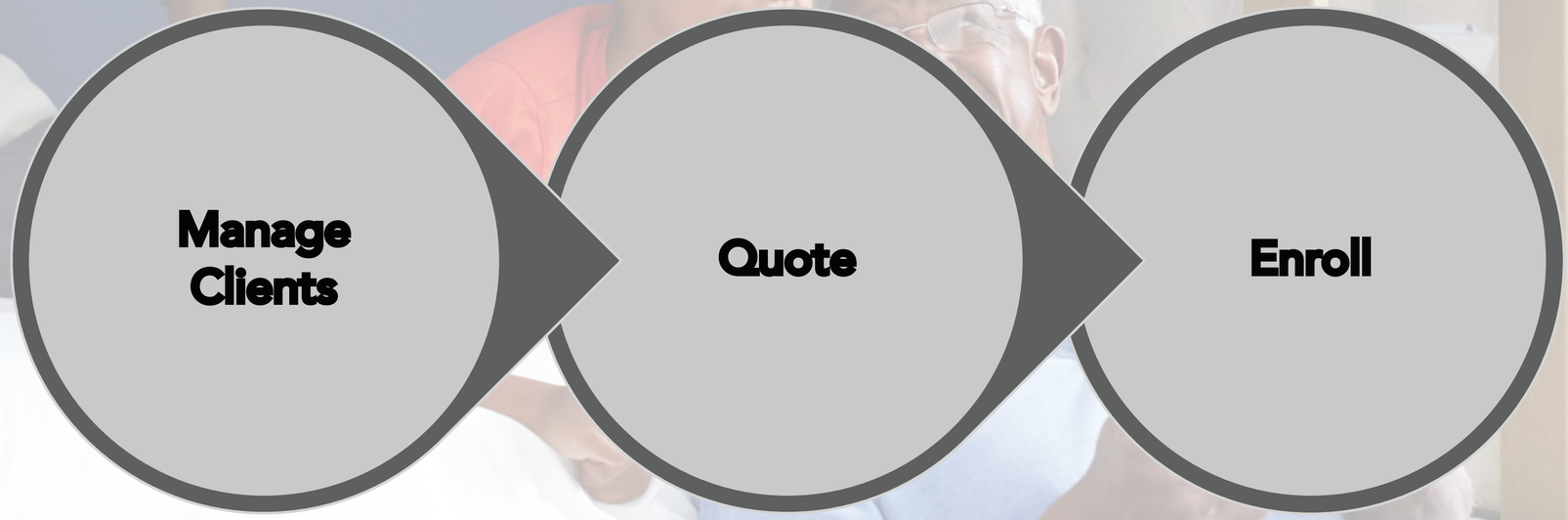
welcome to the new

Medicare CENTER

Built to help agents...



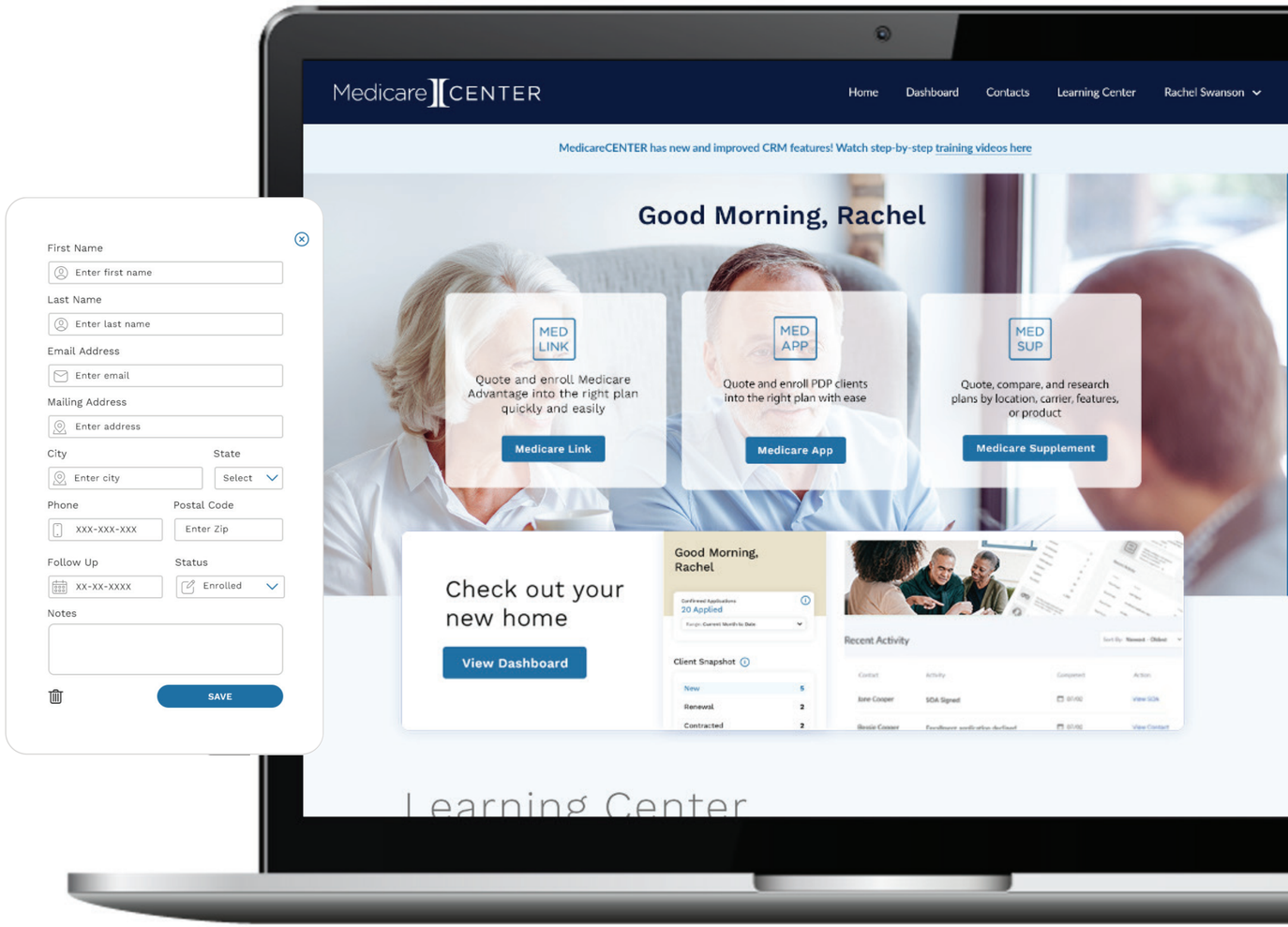
…save time, and produce more.



Simplified CRM

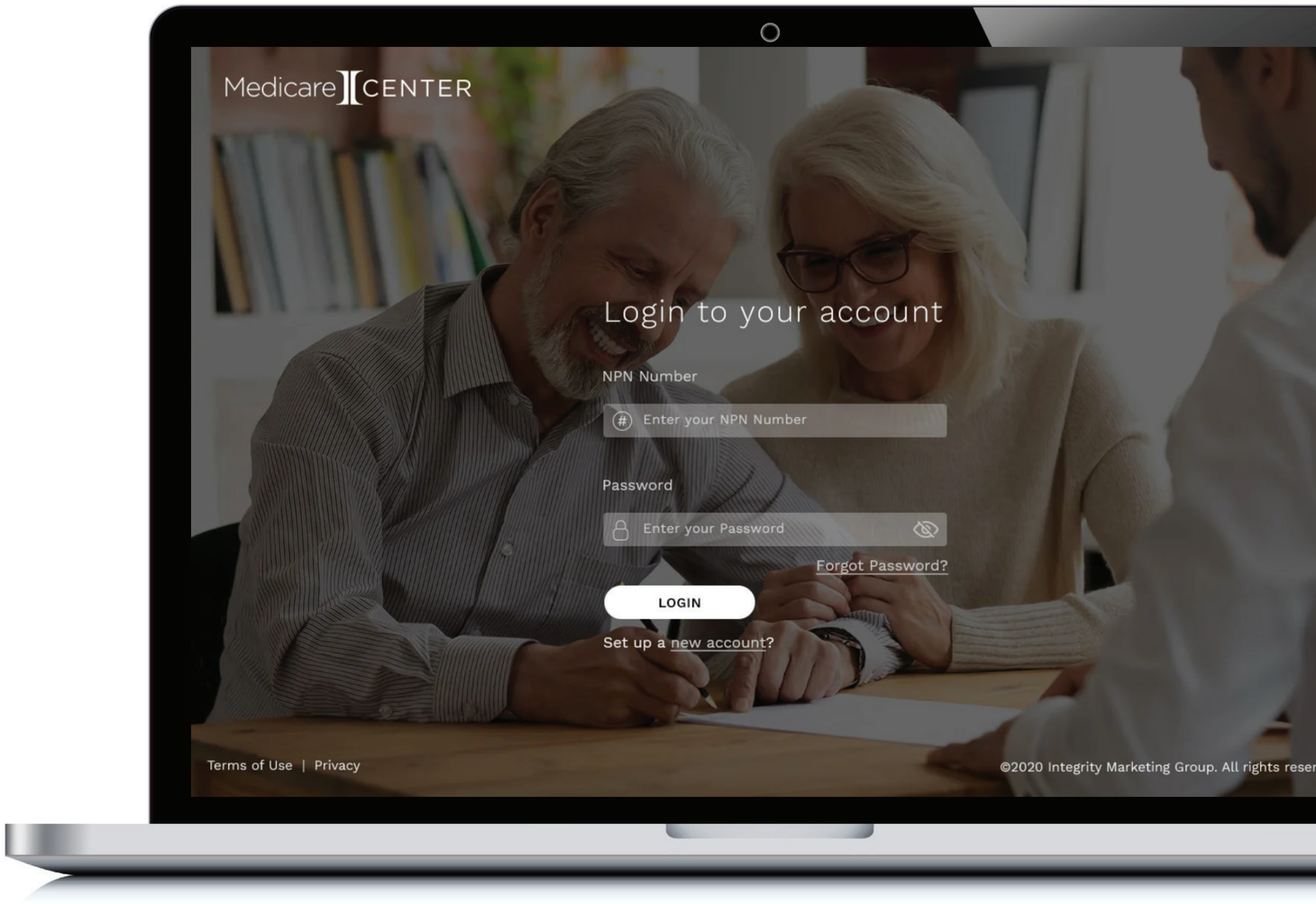
Client Relationship Management

- Simply manage clients electronically, on any device!
- Track clients regardless of enrollment or quoting tool
- Create a new client with just email or phone number
- Plan communications and next steps



Universal Login

- Say goodbye to separate logins!
- One login to access the quoting and enrollment tools you need
- Easily reset passwords and manage admin communications
- Easily register and link your account

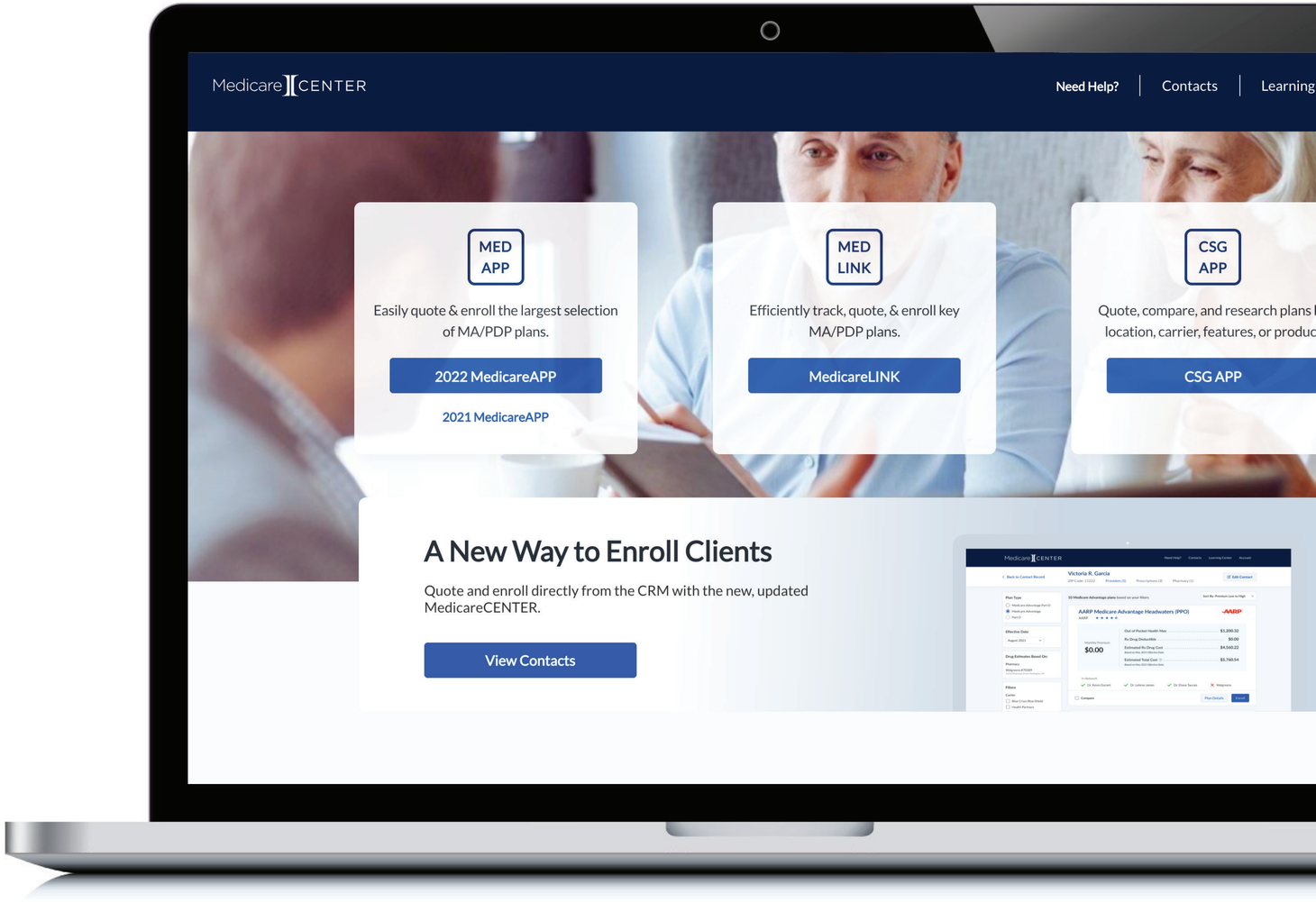


Learning Center

- Learn tips and industry best practices on-the-fly
- Easy access to guides and support to make using the new MedicareCENTER easy
- Get the latest carrier insights on products and requirements

Demonstration

- Link account via NPN number
- Reset password
- Login
- Click to Medicare Advantage and PDP enrollment tools:
  - MedicareAPP
  - MedicareLINK
- Click to CSG for MedSup quoting
- User menu
- Learning Center
- CRM
- CRM add/edit client information



MedicareAPP

The most widely adopted Medicare shopping and enrollment solution. Supports 9 of the top 10 U.S. carriers. Supports millions of consumers every year.

MedicareLINK

Powerful new Medicare shopping and enrollment solution created by a team with more than 30 years combined experience running large retail Medicare brokerage.

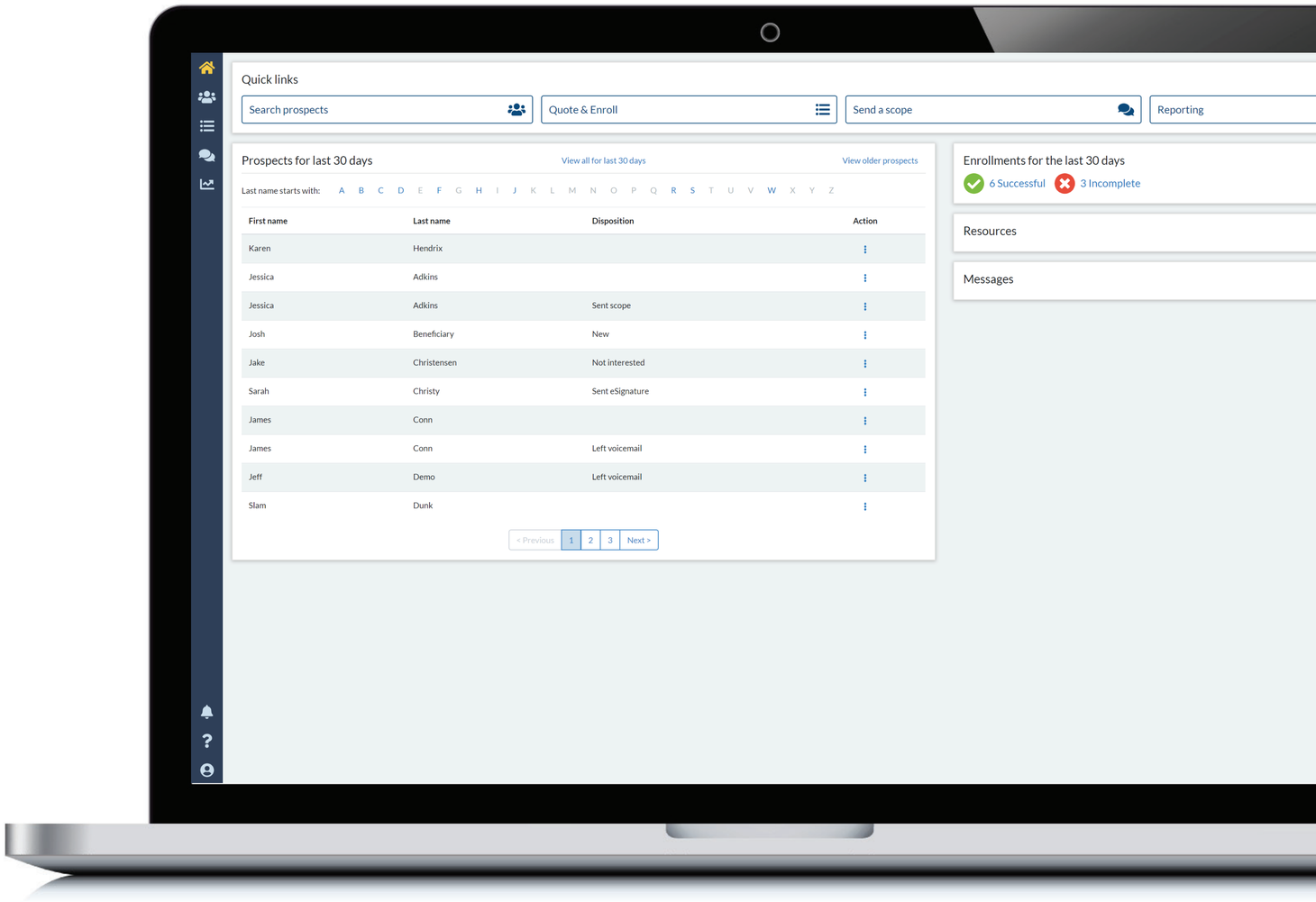
	MedicareAPP	MedicareLINK
2020 Client Data:*	☑	☐
Carriers Available:	25+	10+
Text Scope of Appointments:	☑	☑
Text to Enroll – E-Signatures:	☑	☑
Store RxDrug Lists:	☑	☑
Personal Shopping Links:	☑	☑
Blue Button RxDrug sync w/Medicare.gov:	☑	☐
'Shop-by-Doc':	☑	☑

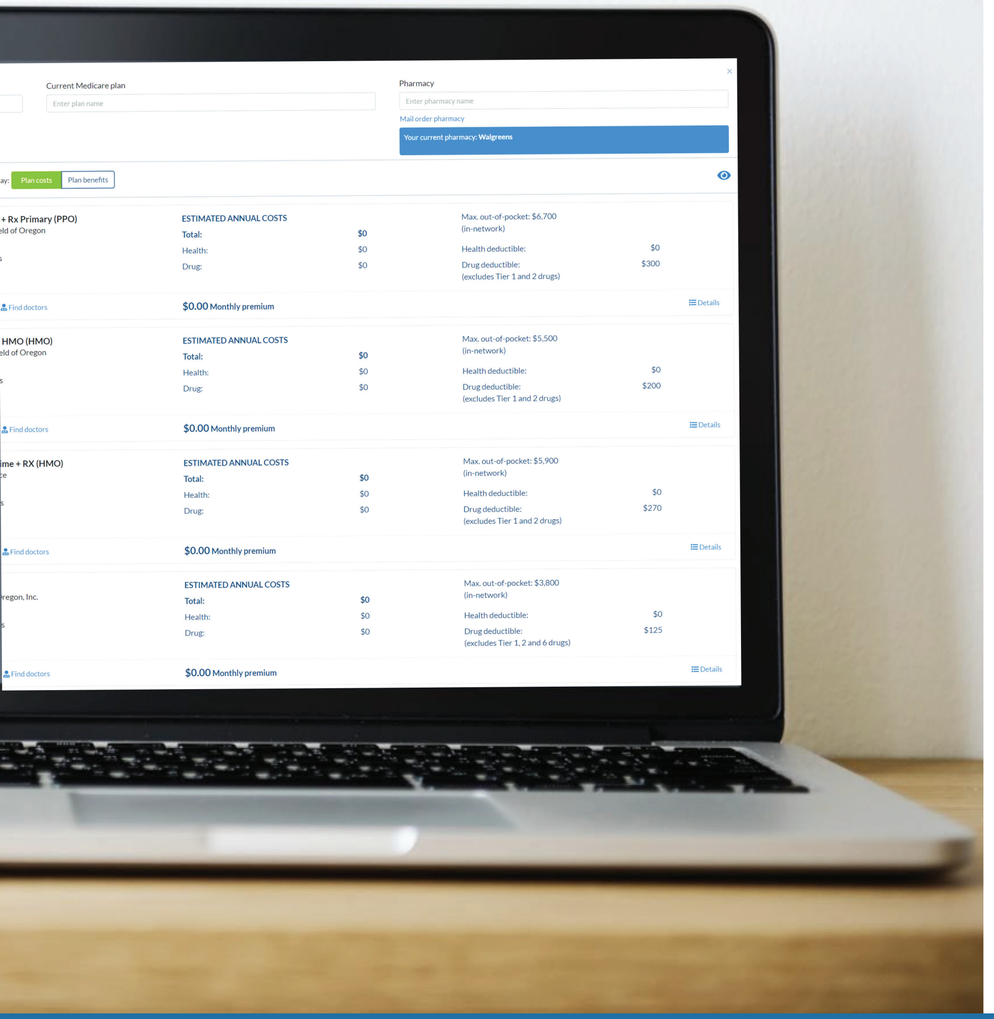
MedicareLINK

MedicareLINK

Powered by Sunfire

- Search plans by clients' doctor and compare to their current health plan.
- Sign SOAs and applications via text or email.
- Enroll clients electronically on any device!
- Pick up where you left of with clients on-the-fly





Easy-to-Use Design

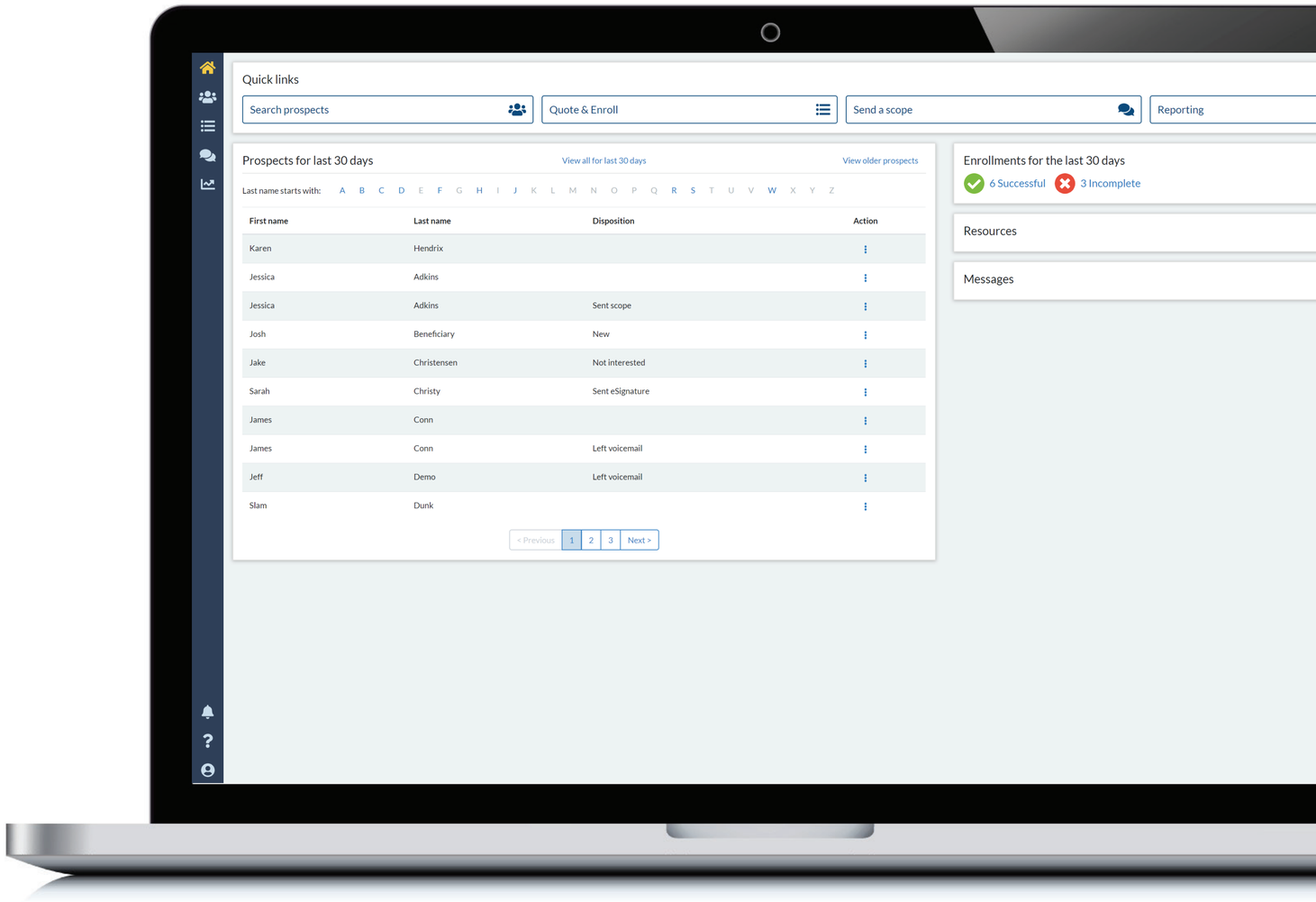
- Quickly quote, follow up, and kick off an enrollment based on each clients' needs

! Works on any device, sell whenever, wherever you are

! Easy to use reporting tools to track performance and success!

Demonstration

- Search/edit prospects
- Start a quote
- Select a quote
- Start an enrollment
- Scope of appointment
- Submit an enrollment
- Prospect menu and disposition
- Reporting
- Additional resources and help section

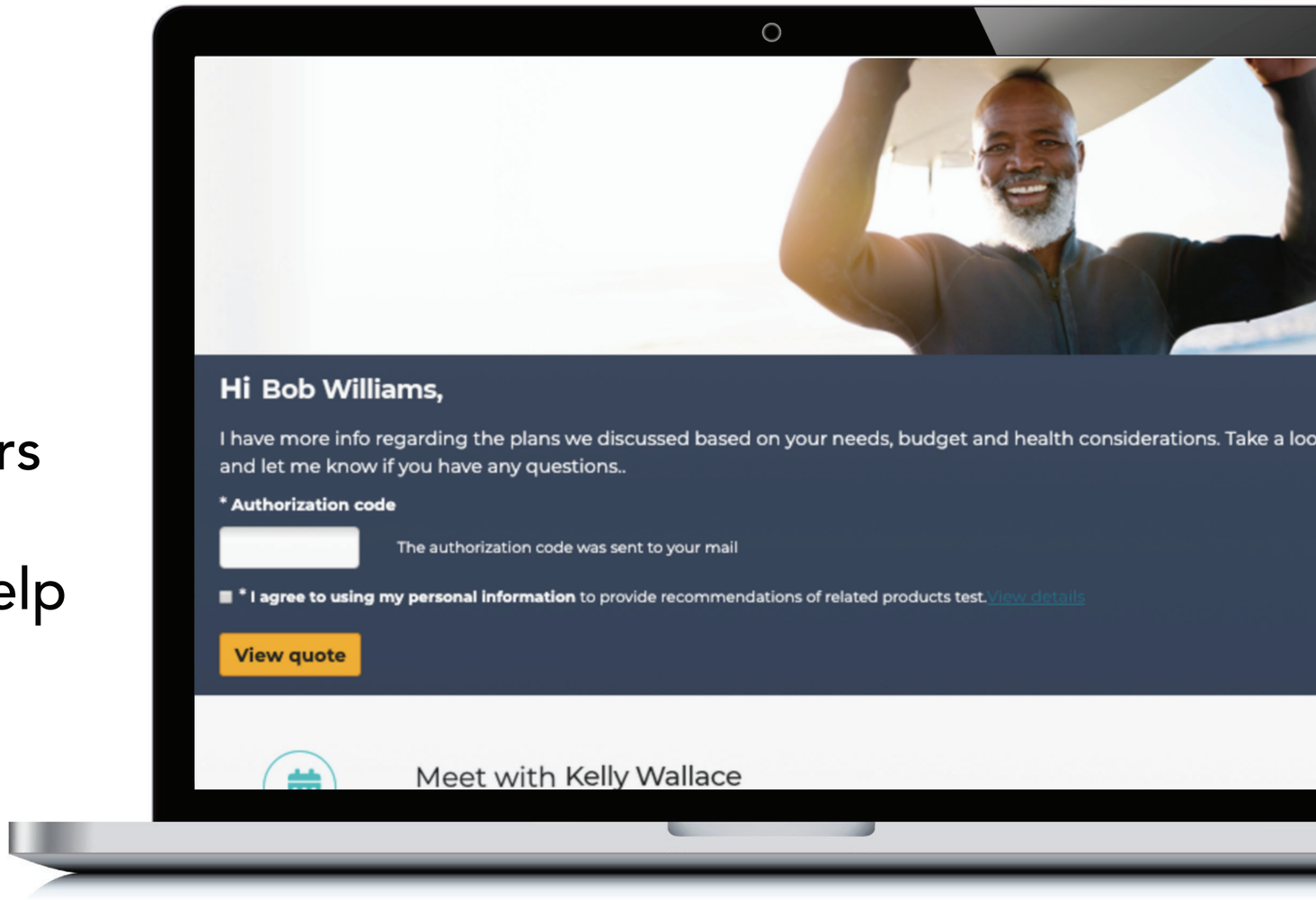


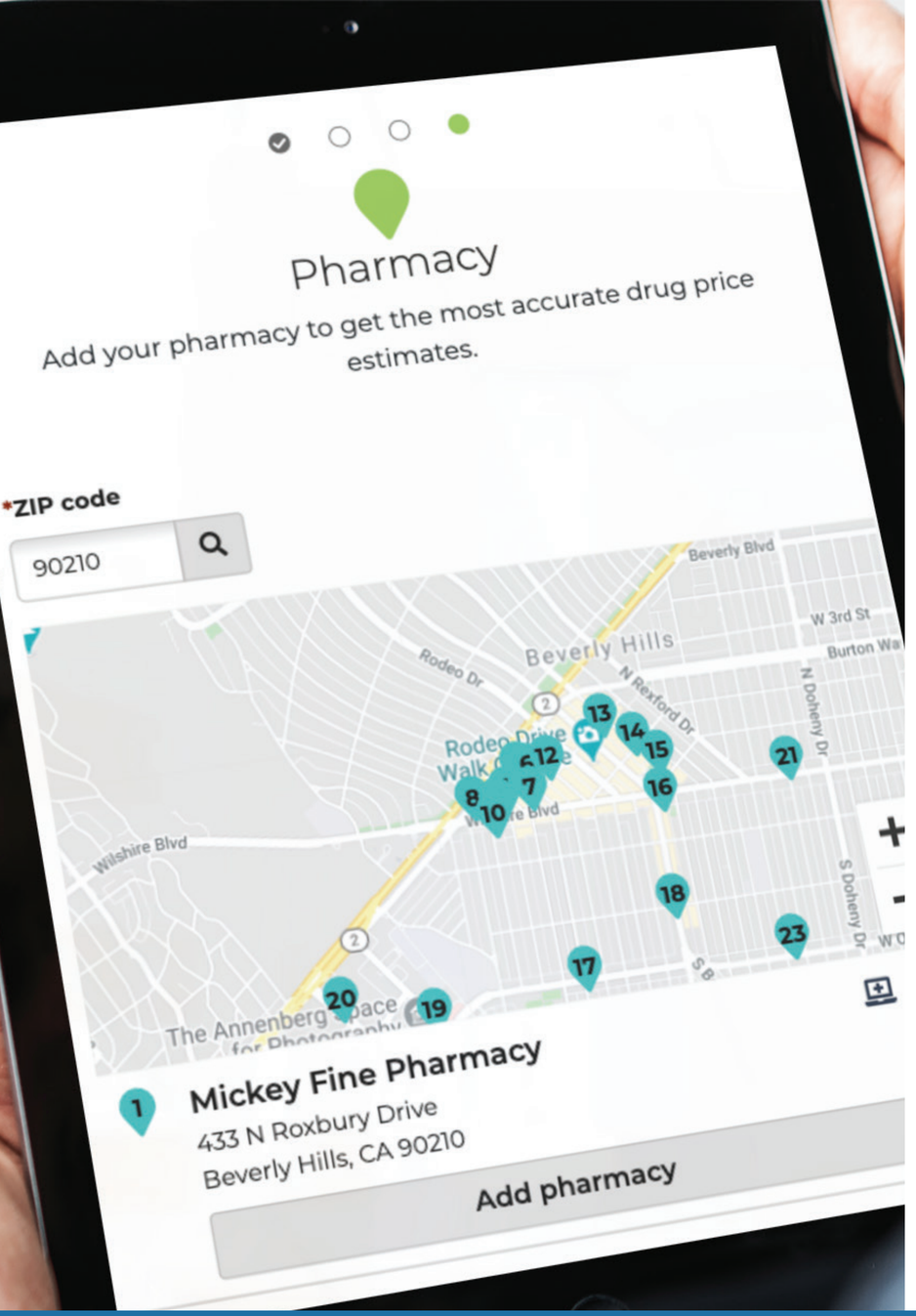
MedicareAPP

MedicareAPP

Powered by Connecture

- Shop, quote, enroll, electronically on any device.
- Access extensive list of carriers
- Estimate cost using guided help
- and more…





Provide the most accurate drug costs

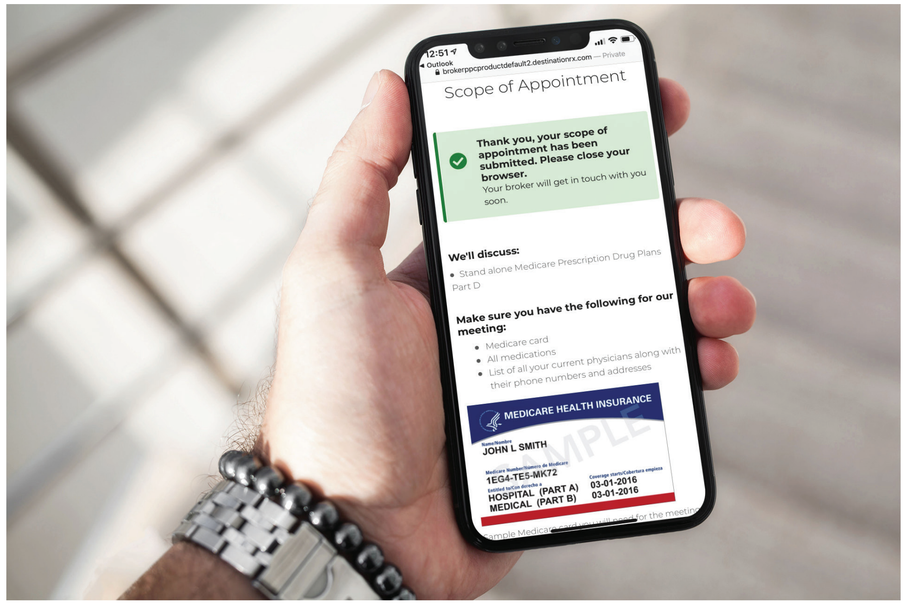
- Deliver pricing based on LOCAL pharmacy pricing (NO regional averages ever used)
- Save drug lists and improve quote accuracy
- Ensure beneficiaries always see reliable annual out-of-pocket estimates when medicine cabinet is included

Armed with the most accurate costs,
beneficiaries will know they found their best fit plan!

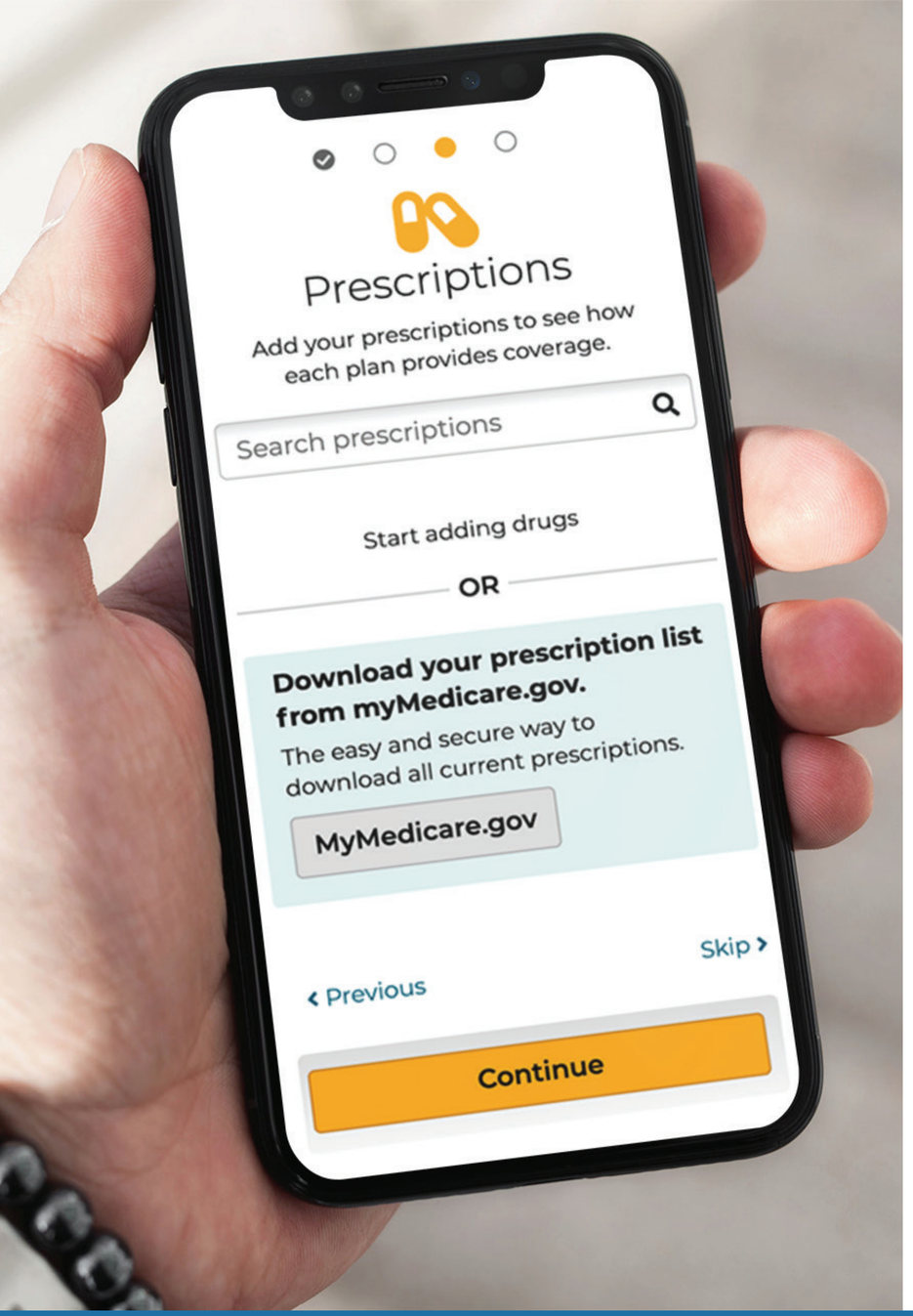
Electronic Signatures

Engage seniors the way they want to engage electronically – text, email or both.

Text to Enroll



Text to sign a SOA



Blue Button

- Helping beneficiaries build their medicine cabinet with ease:

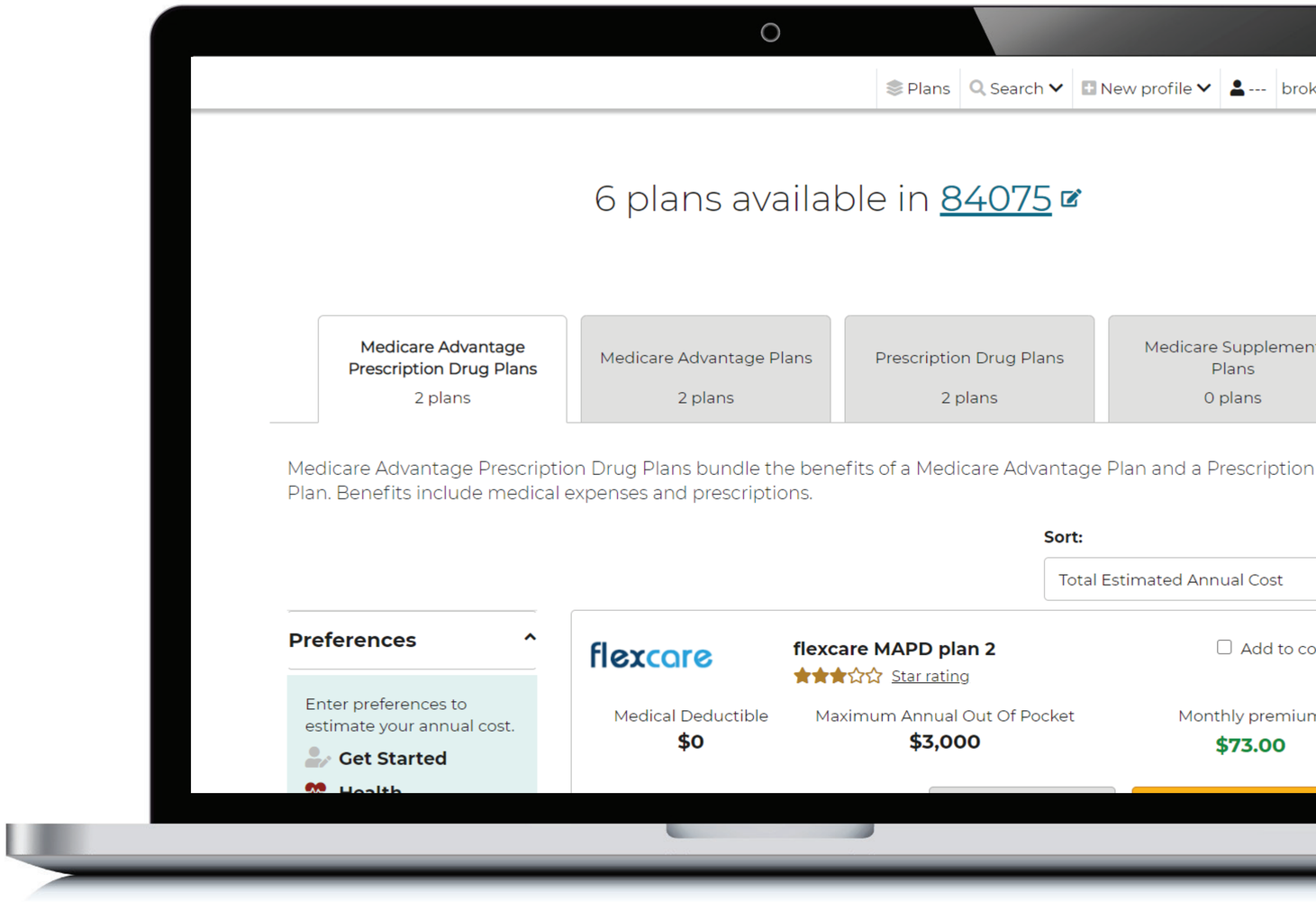
! Automatically – no typing necessary

! Error-free

! Always current

Demonstration

- Search/edit profiles
- Add preferences
- Scope of appointment
- Profile menu and details
- Start and filter a quote
- Send a quote
- Select a quote
- Start an enrollment
- Submit an enrollment
- Reporting
- Additional resources and help section



This may be the largest AEP ever,

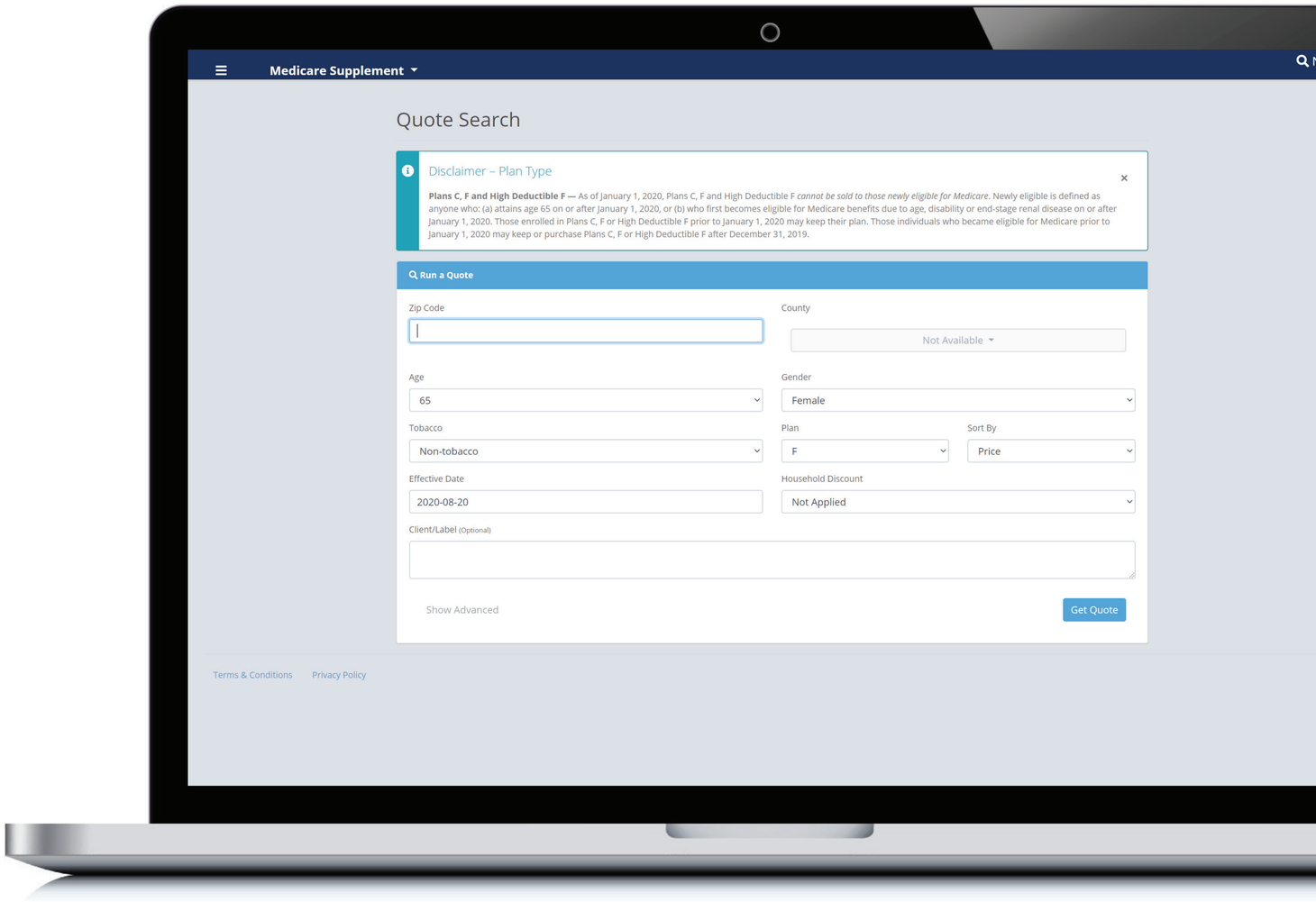
we are giving you choice for your enrollment tool.

MedSupp Quoting with CSG

Medicare Supplement

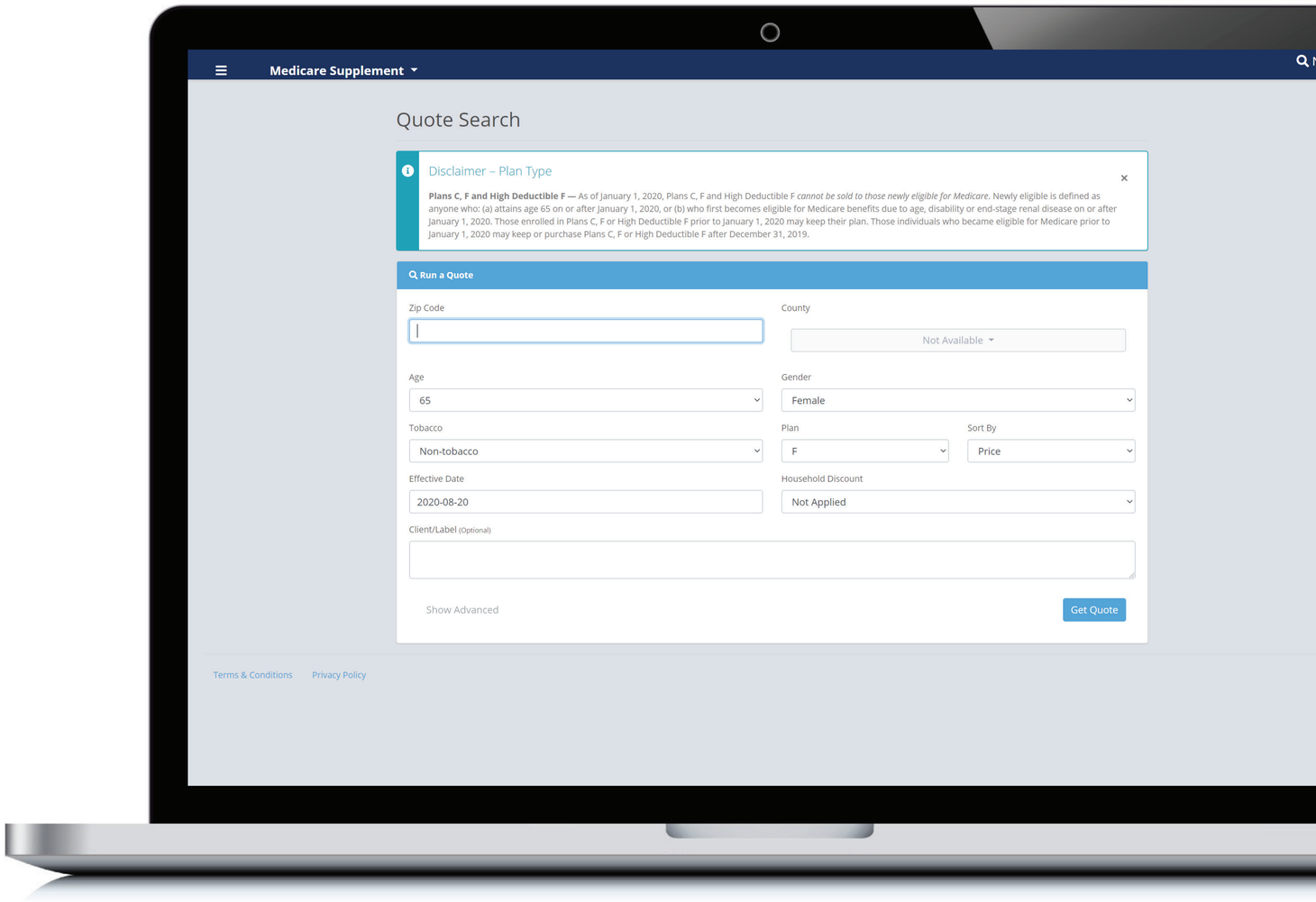
quoting with CSG

- Quickly and easily quote on key factors
- Find the right plans for your clients
- Powered by CSG’s industry leading quote data sources



Demonstration

- Start a quote
- Filter and sort quotes
- Compare quotes
- Export a quote



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