

Enrollment  
Options





## Integrated Contact Management



- Powered by Integrity
- Book of business import capabilities
- Integrated quoting and enrollment
- Prescription drug, provider, and pharmacy lookup and storage in client's entry
- Email/SMS SOAs and store in client's entry
- Enroll directly from client's entry
- Activities and Reminders for streamlined contact lifecycle management
- Dashboard and Reporting

\*See carrier comparison chart for carriers available



## MedicareAPP



- Powered by Connecture
- Blue Button Integration
- Personalized URL (PURL)
- Provider lookup
- Email/SMS (text) signatures for SOA and applications
- Agent photo included in emails
- Dashboard Reporting
- HRA availability:
  - Aetna
  - Aetna Allina
  - BCBS Arkansas
  - BCBS Idaho
  - BrightHealth
  - Centene
  - CIGNA
  - Clover
  - Devoted
  - Experience Health
  - Freedom
  - Health Team Advantage
  - Humana
  - Optimum
  - Scott & White
  - Wellcare
  - Zing Health

\*See carrier comparison chart for carriers available



## MedicareLINK



- Powered by Sunfire
- Needs analysis introduction
- Current plan vs. future plan comparison
- Provider lookup
- Email/SMS (text) signatures for SOA and applications
- HRA availability:
  - Aetna
  - Anthem
  - Humana
  - Wellcare

\*See carrier comparison chart for carriers available



## CSGAPP



- Powered by CSG Actuarial
- Quote multiple products: Med Supps, Hospital Indemnity, Final Expense, Dental, Vision and Hearing
- Access market research for ZIP codes on product and underwriting
- Create heatmaps for product/carrier competitiveness
- Website plug-in with agency's branding available for lead gen and instant Med Supp quoting
- Document Locker search a database and find underwriting guides, product brochures, paper applications and more
- Full suite of products with a savings value of \$4,000 annually