

MedicareLINK
The New
Agent
Workflow



MedicareLINK NEW Features



Needs Assessment Workflow



Traffic Light “progress” bar



Plan Scoring & Ranking



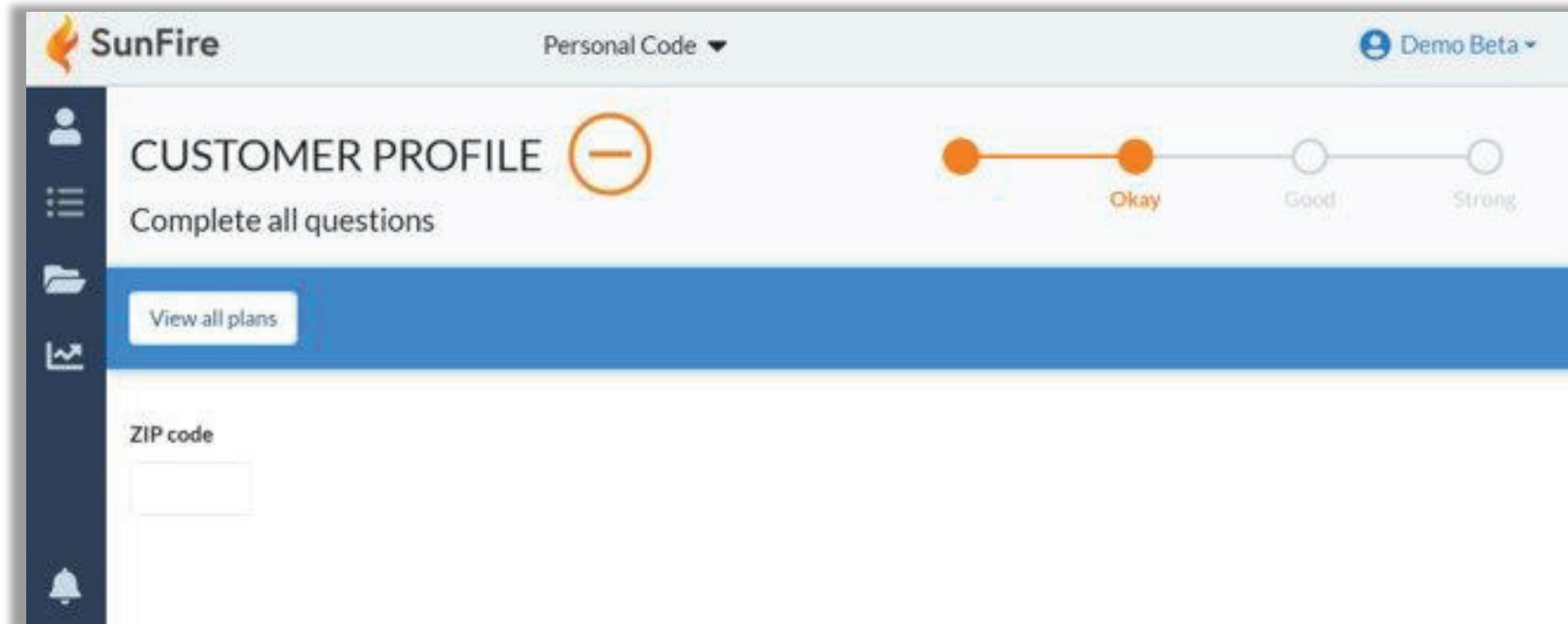
Improved Provider Search

Table of Contents

- 1 Building the Customer Profile
- 2 Ranking Benefits
- 3 Needs Assessment Workflow
- 4 Plans Page
- 5 Provider Search
- 6 Plan Comparison
- 7 Enrollment

Building the Customer Profile

Customer Profile



Clicking on "View all plans" will give you plan information. This is **not** the recommended way to use the tool. To get an accurate premium for the best plans, add medications and add PCP to yield the best plan results.


Customer Profile


The traffic light will provide you with an alert of important and mandatory information. Click on each section to answer all questions so that the system can provide accurate results.

CUSTOMER PROFILE  Add information



Okay Good Strong

CUSTOMER PROFILE  Complete all questions



Okay Good Strong

CUSTOMER PROFILE  Looks good!



Strong

Customer Profile

After entering the zip code to select the plan types to discuss with the customer.

Please select the plan types to discuss with the customer:

- Medicare Advantage/Part D
- Part D
- Medicare Supplement
- Medicare Advantage
- Special Needs

Ranking Benefits

Ranking Benefits

Agents can select and rank plan benefits that are most important to the customer. These selections will be factored into the plan scoring, based on priority.

What's most important to you?

Priority

1 Flexibility to see any provider [?](#)

2 Keep current doctor(s)

3 Frequent traveler

Dental coverage

Vision coverage

Hearing coverage

Insulin savings

Over-the-counter coverage (OTC) [?](#)

Transportation [?](#)


Needs Assessment Workflow

Drug Cabinet

When completing the needs assessment, the agent will have an opportunity to **ADD PHARMACY & MEDICATIONS** for the customer.

Are you taking prescription medications?

<input checked="" type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> I don't have my medications available	<input type="radio"/> I have separate prescription drug coverage	<input type="radio"/> I don't know
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Medications Dialog

After selecting 'Add Pharmacy & Medications', the Agent will be prompted to select a preferred pharmacy branch and to enter the associated medication details.

ADD PHARMACY & MEDICATIONS [X]

What pharmacy do you use most often to fill your prescriptions?

Walgreens [I want to use a mail order pharmacy](#)

Medications

Medication name

[Red Arrow points to this input field]

+ Add medication Save & add another medication Cancel

Save pharmacy & medications Cancel

Add Medication Name

Our system has a convenient type ahead feature that populates a shortlist of common medication names after entering the first 3 letters.

This is a time saving opportunity for the agent to make the correct selection quickly.

The screenshot shows a web form titled "ADD PHARMACY & MEDICATIONS" with a close button in the top right corner. The form contains the following elements:

- A question: "What pharmacy do you use most often to fill your prescriptions?"
- A text input field containing "Walgreens".
- A link: "I want to use a mail order pharmacy".
- A section header: "Medications".
- A "Medication name" label above a text input field containing "Lip". This input field is highlighted with a red border.
- A dropdown menu below the input field showing suggestions: "Lipitor" and "Lipofen".
- Buttons: "Add medication" (with a plus icon), "Save & add another medication", and "Cancel".
- At the bottom of the form, there are two buttons: "Save pharmacy & medications" and "Cancel".

Selecting Dosage

Once the medication name has been entered, the agent can:

- Review generic options
- Verify dosage amounts

TIP: The most popular dosage will be highlighted on the screen.


ADD PHARMACY & MEDICATIONS

What pharmacy do you use most often to fill your prescriptions?

Walgreens [I want to use a mail order pharmacy](#)

Medications

Medication name
Lipitor

Dosage Show Generic medications 

Lipitor TAB 10MG * * This is the most common dosage

Lipitor TAB 20MG

Lipitor TAB 40MG

Lipitor TAB 80MG

[+ Add medication](#) [Save & add another medication](#) [Cancel](#)

[Save pharmacy & medications](#) [Cancel](#)

Selecting Quantity

The agent will also be prompted to verify additional information for each added medication:

- Quantity per Refill
- Refill Frequency

The screenshot shows a web form titled "ADD PHARMACY & MEDICATIONS". At the top, there is a blue header with a close button (X). Below the header, the form asks "What pharmacy do you use most often to fill your prescriptions?" with a text input field containing "Walgreens" and a link "I want to use a mail order pharmacy".

The "Medications" section is titled "Medications" and lists "Lipitor TAB 10MG(30 refill every month)". Below this, there is a form for adding a new medication. The "Medication name" field contains "Verapamil HCL". The "Dosage" section has a checked checkbox for "Verapamil HCL TAB 80MG".

A red box highlights the "Quantity per refill" field, which contains the number "30", and the "Refill frequency" dropdown menu, which is set to "Every month".

At the bottom of the medication form, there are three buttons: "+ Add medication", "Save & add another medication", and "Cancel". At the very bottom of the main form, there are two buttons: "Save pharmacy & medications" and "Cancel".

Saving Medications

After all medications have been added, the Agent will then **SAVE** the information and continue with the quoting activities.

ADD PHARMACY & MEDICATIONS

What pharmacy do you use most often to fill your prescriptions?


Walgreens [I want to use a mail order pharmacy](#)

Medications

Lipitor TAB 10MG(30 refill every month)	Edit	Remove
Verapamil HCL TAB 80MG(30 refill every month)	Edit	Remove

[+ Add medication](#)

[Save pharmacy & medications](#) [Cancel](#)



Health Usage Estimates

How often do you see a doctor or receive medical care in a year?

Required Disclosures*

- This question does not affect the plan premium - it is used to calculate a better estimate of costs. It is not required to provide any health related information unless it will be used to determine enrollment eligibility.

Rarely

Occasionally

Frequently

I don't know

Do you receive Extra Help / Low Income Subsidy (optional)?

Yes

No

I don't know

Plans Page

Plan Page – Access Drug Cabinet

The Agent can **ADD/EDIT** the medication list at any point of the quoting process using the links on the top ribbon bar.

The screenshot displays a web interface for plan selection. At the top, a ribbon bar contains several links: 'Enrolled in MAPD plan', 'CVS', '2 medication(s)', 'No doctor(s)', and 'Sees doctor rarely'. The '2 medication(s)' link is highlighted with a red box. Below the ribbon bar, the main content area shows a list of plans. The first plan is '95 AARP Medicare Advantage Freedom Plus (HMO-POS)' with a monthly premium of \$0.00 and estimated annual costs of \$7,128. The second plan is '100 WellCare Best (HMO)' with a monthly premium of \$0.00 and estimated annual costs of \$7,248. The third plan is '98 AARP Medicare Advantage SecureHorizons Focus (HMO)' with a monthly premium of \$0.00 and estimated annual costs of \$7,128. The '2 medication(s)' link is also present in the top right corner of the plan details area.

PLANS FOR 90210 (30 results)

Enrolled in MAPD plan | CVS | 2 medication(s) | No doctor(s) | Sees doctor rarely

List | X-ray | Sort: Top rated plans | Time period: Annual | Costs | Benefits

Plan type

- Medicare Advantage/Part D
- Part D
- Medicare Supplement
- Medicare Advantage
- Special Needs
- Hospital Indemnity

Filter by

Plan features

- Five star rating
- Part B give back
- Dental coverage
- Vision coverage
- Hearing coverage
- Insulin savings

Company

- Aetna Inc.
- AHMC Central Health LLC
- Alignment Health Plan
- Anthem Blue Cross
- California Physicians' Service
- Centene Corporation

95 AARP Medicare Advantage Freedom Plus (HMO-POS) | UnitedHealthcare H0543-210-000 | 4 out of 5 stars (2021 plan year)

Max. out-of-pocket: \$1,000 (in-network) | Medical deductible: \$0 | Drug deductible: \$0 | Monthly premium: \$0.00 | Estimated annual costs: \$7,128

Compare / Email Quote | Details | Current plan

Recommended plans ?

100 WellCare Best (HMO) | Monthly premium: \$0.00 | Estimated annual costs: \$7,248

98 AARP Medicare Advantage SecureHorizons Focus (HMO) | UnitedHealthcare H0543-168-000 | 4 out of 5 stars (2021 plan year)

Max. out-of-pocket: \$1,000 (in-network) | Medical deductible: \$0 | Monthly premium: \$0.00 | Estimated annual costs: \$7,128

Preferred Pharmacy Search

Agents can now access Preferred Pharmacies directly on the plan card itself. They can simply click to add an in-network pharmacy, or search by map, which will alter their pharmacy selection and re-sort available plans.

The screenshot displays a Medicare Advantage plan card for "AARP Medicare Advantage SecureHorizons Focus (HMO)". The plan is provided by UnitedHealthcare (H0543-168-000) and has a 4 out of 5 star rating for the 2021 plan year. Key financial details include a maximum out-of-pocket of \$1,000 (in-network), a medical deductible of \$0, and an estimated annual cost of \$0. The interface features two prominent search options: "Preferred Pharmacies" (indicated by a pharmacy icon) and "Doctors accepting patients" (indicated by a doctor icon). These options are highlighted with yellow boxes. At the bottom left, there is a checkbox for "Compare / Email Quote". At the bottom right, there are two buttons: "Details" and "Enroll".

99 AARP Medicare Advantage SecureHorizons Focus (HMO) UnitedHealthcare H0543-168-000
★★★★☆ 4 out of 5 stars (2021 plan year)

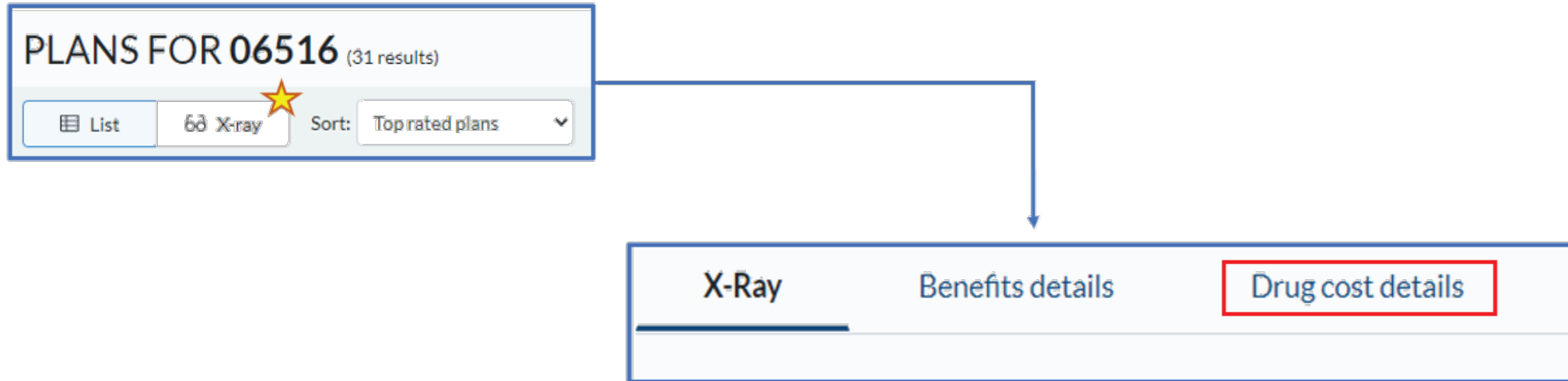
Max. out-of-pocket: \$1,000 (in-network) \$0.00 \$0
Medical deductible: \$0
Drug deductible: \$0
Preferred Pharmacies Doctors accepting patients
Estimated annual costs
View breakdown

Preferred Pharmacies Doctors accepting patients

Compare / Email Quote Details Enroll



Plan X-Ray View

Using the Plan X-ray view, an Agent can easily review information about the plan benefits and drug cost details



Plan X-Ray

Under the *Drug Cost Details*, an Agent will be able to review the pricing breakdown of each medication, as well as the cost per month.

Drug Tier information	
Verapamil HCL TAB 80MG 	
Tier	2
Quantity limits	No
Prior authorization	No
Step therapy	No
Full drug cost	\$2.01
Lipitor TAB 10MG 	
Full drug cost	Not on formulary \$415.15

Any amount you spend for a non-formulary drug is not counted towards the deductible, initial coverage limit or out of pocket costs UNLESS the plan approves a formulary exception.
If an exception is approved, the non-formulary drug will be covered.

Provider Search

Shop By Plan or Doc

To find a New PCP:

Agents can now find an in-network PCP accepting new patients directly on the plan card itself. This is especially helpful when customers are open to seeing a new Doctor or are willing to change Doctors in order to enroll in the plan they want.

To keep an existing Doctor(s):

If your customer wants to keep any current Doctors, you can quickly find plans with their doctor in-network through accessing Shop by Doc on the top ribbon bar.

Shop By Plan

The screenshot shows a search interface for doctors. At the top left, there are filters for 'Preferred Pharmacies' and 'Doctors accepting patients'. A dropdown menu on the right shows a radius of '5 miles' selected from options: 5 miles, 10 miles, 15 miles, 25 miles, and 50 miles. Three doctor profiles are visible:

- KWAW, ISIDORE**: 9201 W SUNSET BLVD, STE 705, WEST HOLLYWOOD, CA 90069. (1.6 miles away). Callout: 'Doctors accepting patients'.
- SIMONS, STEVEN**: 436 N BEDFORD DR, STE 214, BEVERLY HILLS, CA 90210. Callout: 'Advanced map search'.
- MIRAHMADI, MIKE**: 435 N BEDFORD DR, BEVERLY HILLS, CA 90210. (2.48 miles away).

At the bottom, there are two search options: 'Advanced map search' and 'Search doctors on carrier site'.

Plan Comparison

Plan Comparison

3 Categories Snapshots :

Benefit details : This offers a total overview of the selected plan(s.)

- Plan documents: featured at the very bottom of the plan comparison view if the agent can't locate specific information (ex. *Evidence of coverage, summary of benefits*)

Drug cost details offers information on the tiers, quantity limits, costs, prior authorization (and more) for the medications entered for the Customers.

TIP: Great for agent breakdown of what a Customer can expect at different parts of the year if necessary

Health cost details : an in-depth breakdown of the usage estimates entered before tied to costs based on service type.

NOTE – You can select up to three plans. Customer can review and complete self-enrollment while viewing comparison. Customer will only see plans for which that agent is licensed to sell.

Plan Comparison

PLANS FOR 06516 (31 results)

No current plan Walgreens 1 medication(s) No doctor(s) Unknown visit frequency

List X-ray Sort: Top rated plans Time period: Annual Costs Benefits

Plan type

- Medicare Advantage/Part D
- Part D
- Medicare Supplement
- Medicare Advantage
- Special Needs

Filter by

Plan features

- Five star rating
- Part B give back
- Dental coverage
- Vision coverage
- Hearing coverage
- Insulin savings

Company

- Aetna Inc.
- Anthem Blue Cross and Blue Shield
- CAREPARTNERS OF CONNECTICUT, INC.
- CONNECTICARE, INC.
- UnitedHealthcare
- WellCare Health Plans, Inc.

Premium

- Under \$20

Recommended plans

100 Anthem MediBlue Access Select (PPO)

Anthem Blue Cross and Blue Shield H2836-005-000
Star Rating: Not enough data available

Max. out-of-pocket: \$7,550 (in-network) / \$11,300 (combined)
Medical deductible: \$0 for In-Network Services per year
\$1,000 for Out-of-Network Services per year
Drug deductible: \$95 (excludes Tier 1, 2 and 6 drugs)

\$25.00
Monthly premium

\$1,841
Estimated annual costs
[View breakdown](#)

Preferred Pharmacies Doctors accepting patients

Compare / Email Quote

[Details](#)

[Enroll](#)

93 Anthem MediBlue Select (HMO)

Anthem Blue Cross and Blue Shield H5854-010-000
★★★★☆ 4 out of 5 stars (2021 plan year)

Max. out-of-pocket: \$6,950 (in-network)
Medical deductible: \$0
Drug deductible: \$275 (excludes Tier 1, 2 and 6 drugs)

\$0.00
Monthly premium

\$1,721
Estimated annual costs
[View breakdown](#)

Preferred Pharmacies Doctors accepting patients

Anthem MediBlue Select (HMO)

Anthem MediBlue Access Select (PPO)

[Compare](#)

[Email](#)

[Cancel](#)

[Details](#)

[Enroll](#)

Medicare Advantage/Part D plans

Anthem MediBlue Extra (HMO)

Compare Plans

Agent can easily review the plan selections side -by-side.

Benefits details

Drug cost details

Health cost details

UnitedHealthcare Medicare Advantage Choice Plan 1
(Regional PPO)

R5342-001-000

★★★★☆4 out of 5 stars (2021 plan year)

Enroll

UnitedHealthcare Medicare Advantage Choice Plan 3
(Regional PPO)

R5342-005-000

★★★★☆4 out of 5 stars (2021 plan year)

Enroll

UnitedHealthcare Medicare Advantage Choice Plan 4
(Regional PPO)

R5342-006-000

★★★★☆4 out of 5 stars (2021 plan year)

Enroll

Summary

Monthly premium	\$16.00	\$46.00	\$84.00
Medical deductible	\$0	\$0	\$0
Out-of-network maximum out-of-pocket	N/A	N/A	N/A
In-network maximum out-of-pocket	\$6,700	\$6,700	\$6,700
Combined maximum out-of-pocket	\$10,000	\$10,000	\$10,000
Drug deductible	\$300 (excludes Tiers 1 and 2)	\$275 (excludes Tiers 1 and 2)	\$150 (excludes Tiers 1 and 2)
Initial coverage limit	\$4,130	\$4,130	\$4,130
Catastrophic coverage limit	\$6,550	\$6,550	\$6,550

Enrollment

Enrollment

Once the plan review is complete, the Agent or Customer will select the green enroll button to continue.

Final Review: Review all details for accuracy, and complete acknowledgement and signature to submit the enrollment.

Enrollment Tracking : Enrollment code, Dashboard, Reports, or Notifications. (*Green means Go*).

Enrollment Form

Review the summary of benefits here and the carriers telephone number should be provided for the beneficiary to write down for future reference.

Be sure to select **all** the answers to the questions that will be prompted by the system.

If questions are missed the system will show a list of errors that need to be corrected before the enrollment can continue.

Important

Agent note: It is important to ensure the beneficiary is well aware of all their benefits and associated costs. Please take a moment to review the summary of benefits.

Options:

I have reviewed the benefits with the beneficiary

[Review summary of benefits guidance now](#)

Required Disclosures*

Aetna Inc. is a Medicare Advantage or Medicare Part D organization with a Medicare contract. Enrollment in a Aetna Inc. Medicare Advantage or Medicare Part D plan requires enrollment in a Medicare Advantage or Medicare Part D plan.

Benefits, premiums and/or copayments/co-insurance may change on January 1.

I can be in only one Medicare Advantage or Medicare Part D plan at a time, and I understand that my enrollment in this plan will automatically disenroll me from any other Medicare Advantage or Medicare Part D plan.

Before we get started with the enrollment, do you understand the benefits we covered earlier?*

[Summary of Benefits](#)

[Discard](#)

Signature Page

On the final page of the Enrollment Form, Agent can select the signature method. Then click **"END ENROLLMENT"** to complete the application.

Signature method

We are proud to be able to offer an Electronic Signature option for you to be able to complete your enrollment today.

This means that we can send you a link as a text message or email that will let you pull up this form and review it yourself before you accept. All you need to do is click that link, confirm the information, and accept. I will be on the phone with you the whole time to answer any questions that you might have. Would you like me to text or email the confirmation link to you now, so that you can finish enrolling in your plan?

Please select an Electronic Signature option:

Text Message
 Email
 No Electronic Signature

Email

Warn customer that the enrollment form may appear in their Junk or Spam folders.

Email Address*
Email@address.com [Send Email](#)

Summary

Beneficiary/Authorized rep signature	Applicant's name
Applicant accepts electronic signature	Mike Smith
Medicare number	Signature date
8HC7DD2TV58	06-21-2021
Agent signature	Agent name
Telesales agent	Demo Beta
Writing ID	Signature date
111111	06-21-2021

[Summary of Benefits](#)

[Discard](#) [Save](#)

[Back](#) [View Summary](#) [End Enrollment](#)

Once customer signs the enrollment form the agent can click on the green button.

Enrollment Complete!

When the success banner displays on the website, it means that the enrollment is complete.

You have successfully enrolled your beneficiary into their plan.



Success

Plan: Aetna Medicare Elite Plan (PPO)

Premium: \$0.00

Thank You!