Medicare CENTER

MedicareLINK The New Agent Workflow

MedicareLINK NEW Features

- Needs Assessment Workflow
- Traffic Light “progress” bar
- Plan Scoring & Ranking
- Improved Provider Search

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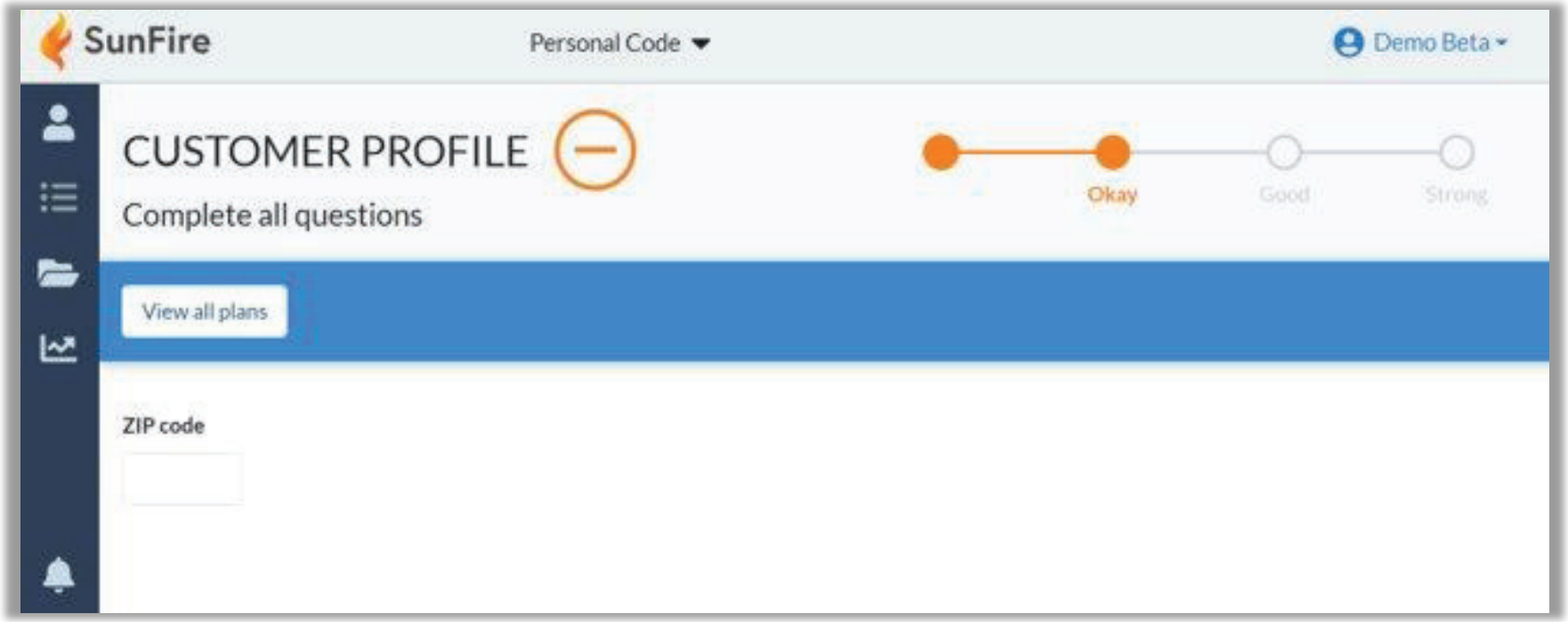
Building the Customer Profile

Customer Profile



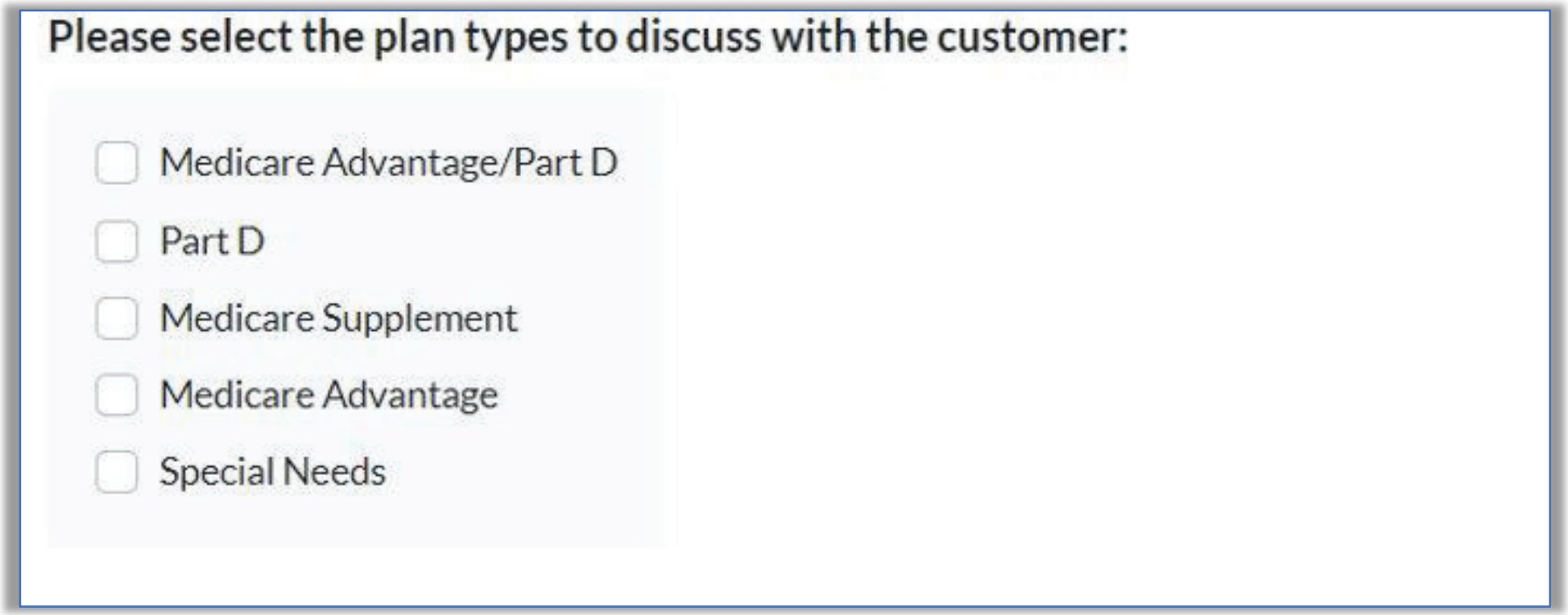
Clicking on "View all plans" will give you plan information. This is **not** the recommended way to use the tool. To get an accurate premium for the best plans, add medications and add PCP to yield the best plan results.

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

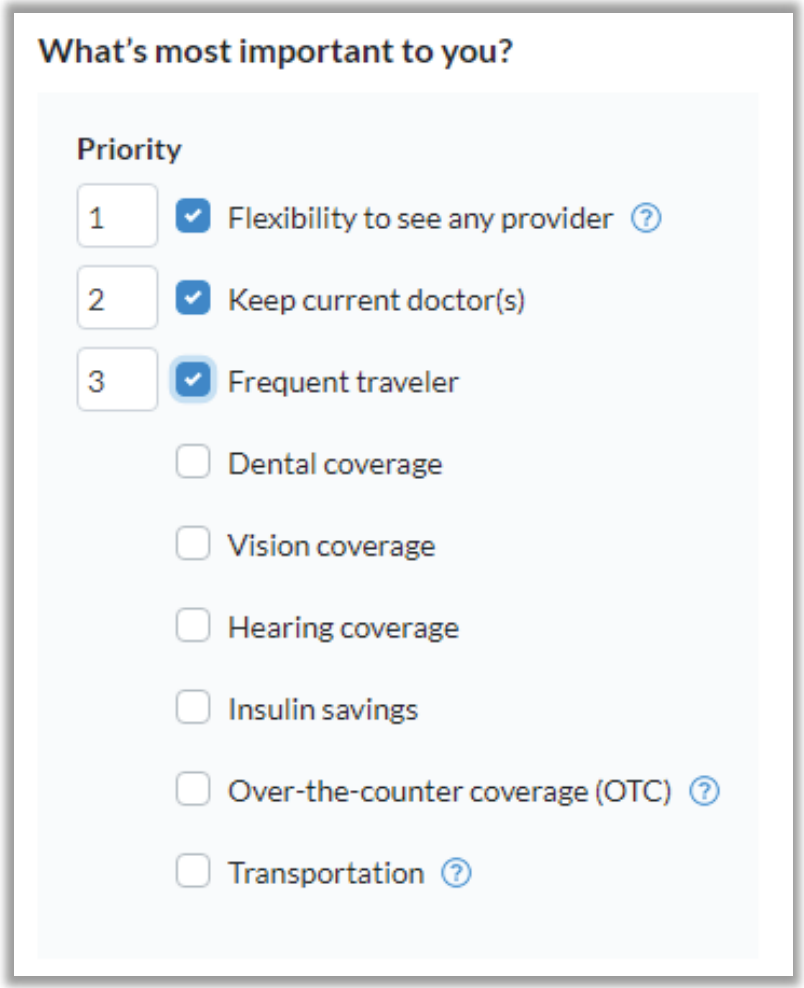
After entering the zip code to select the plan types to discuss with the customer.



Ranking Benefits

Ranking Benefits

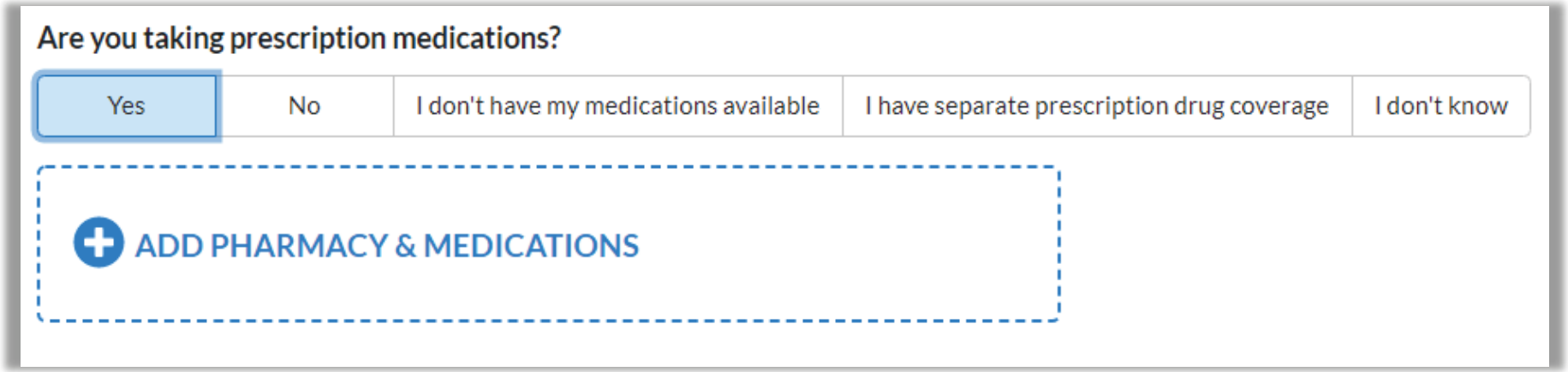
Agents can select and rank plan benefits that are most important to the customer. These selections will be factored into the plan scoring, based on priority.



Needs Assessment Workflow

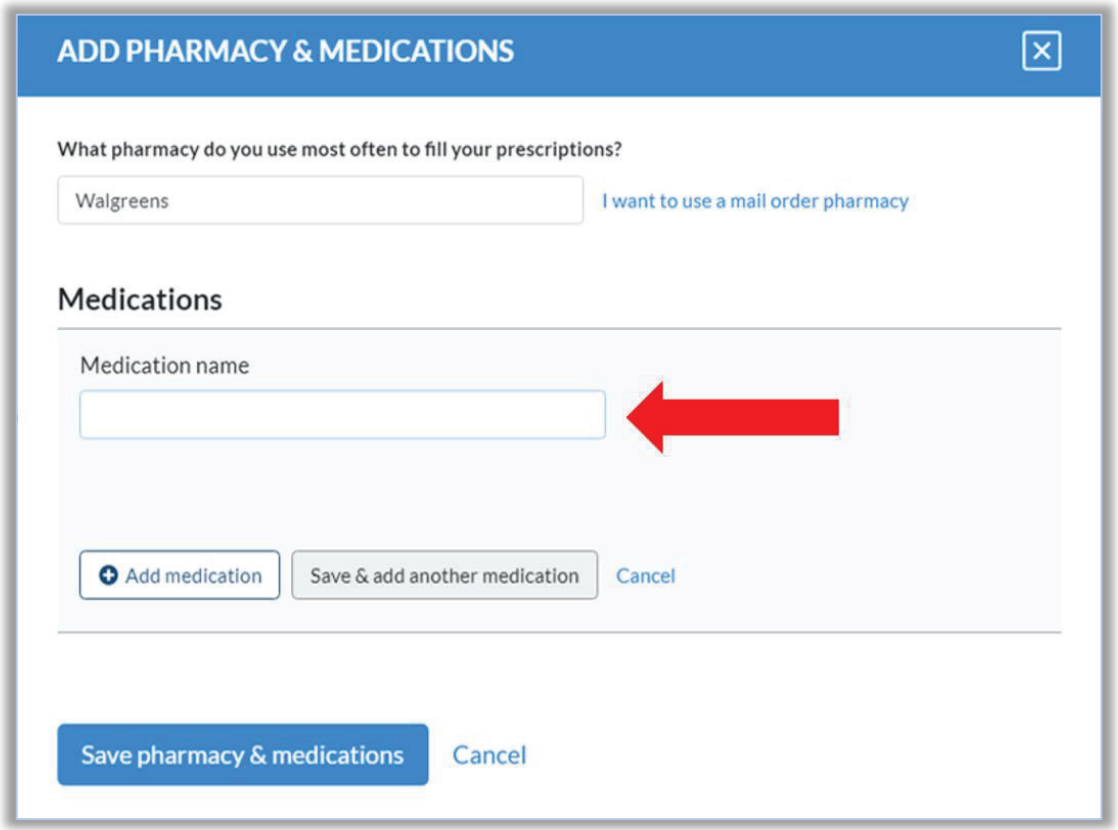
Drug Cabinet

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



Medications Dialog

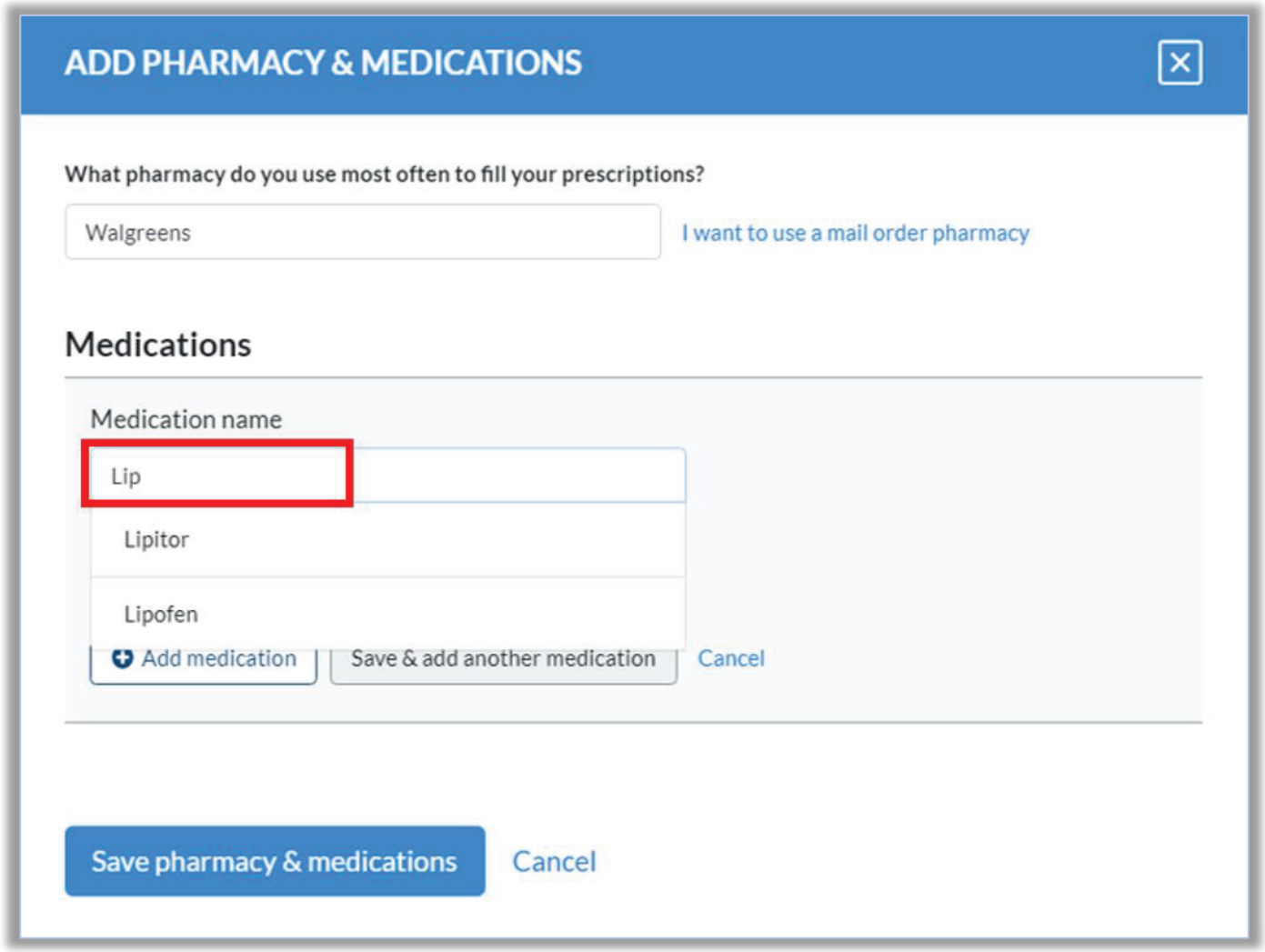
After selecting ‘Add Pharmacy & Medications’, the Agent will be prompted to select a preferred pharmacy branch and to enter the associated medication details.



Add 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.

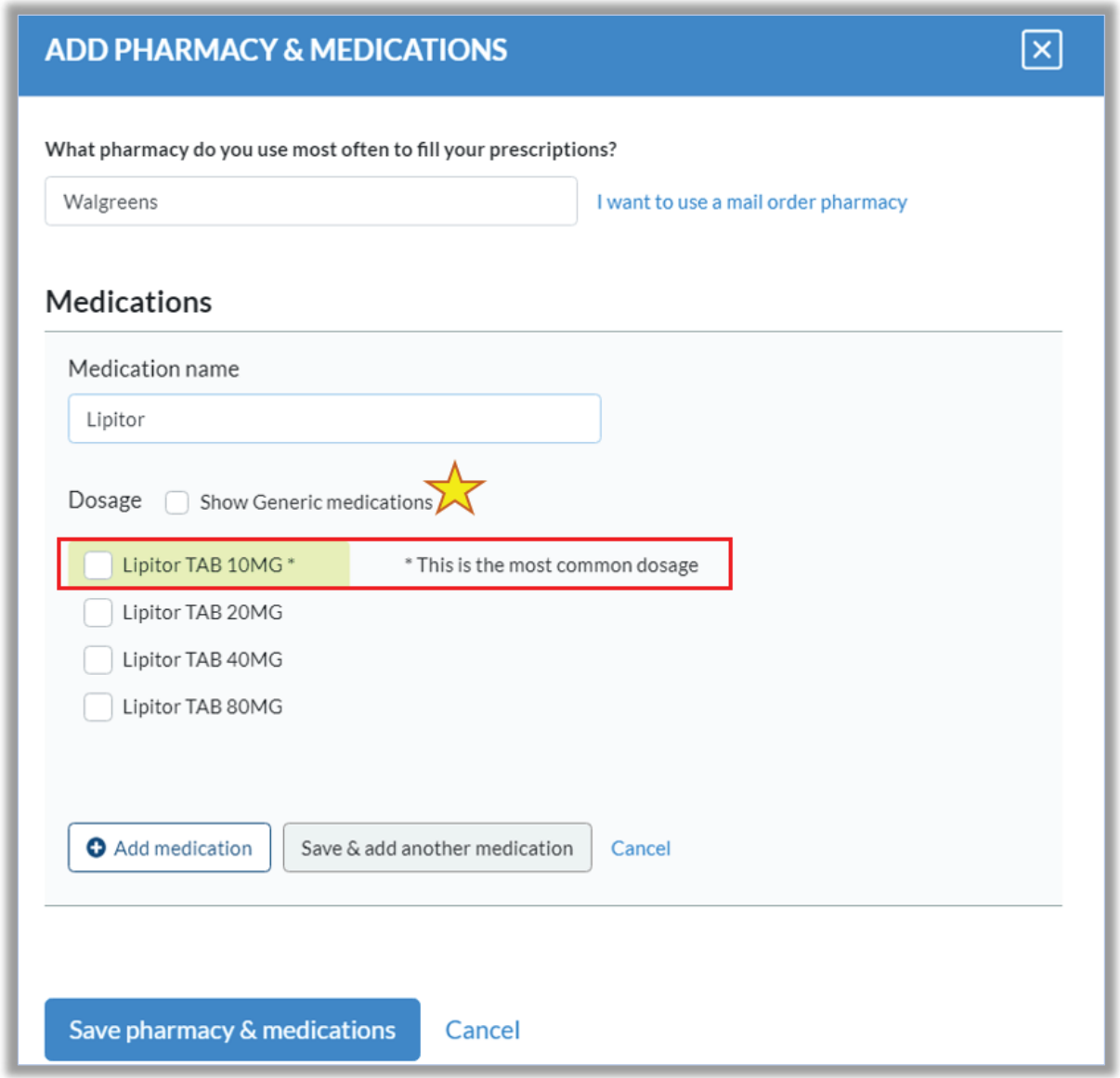


Selecting Dosage

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

- Review generic options
- Verify dosage amounts

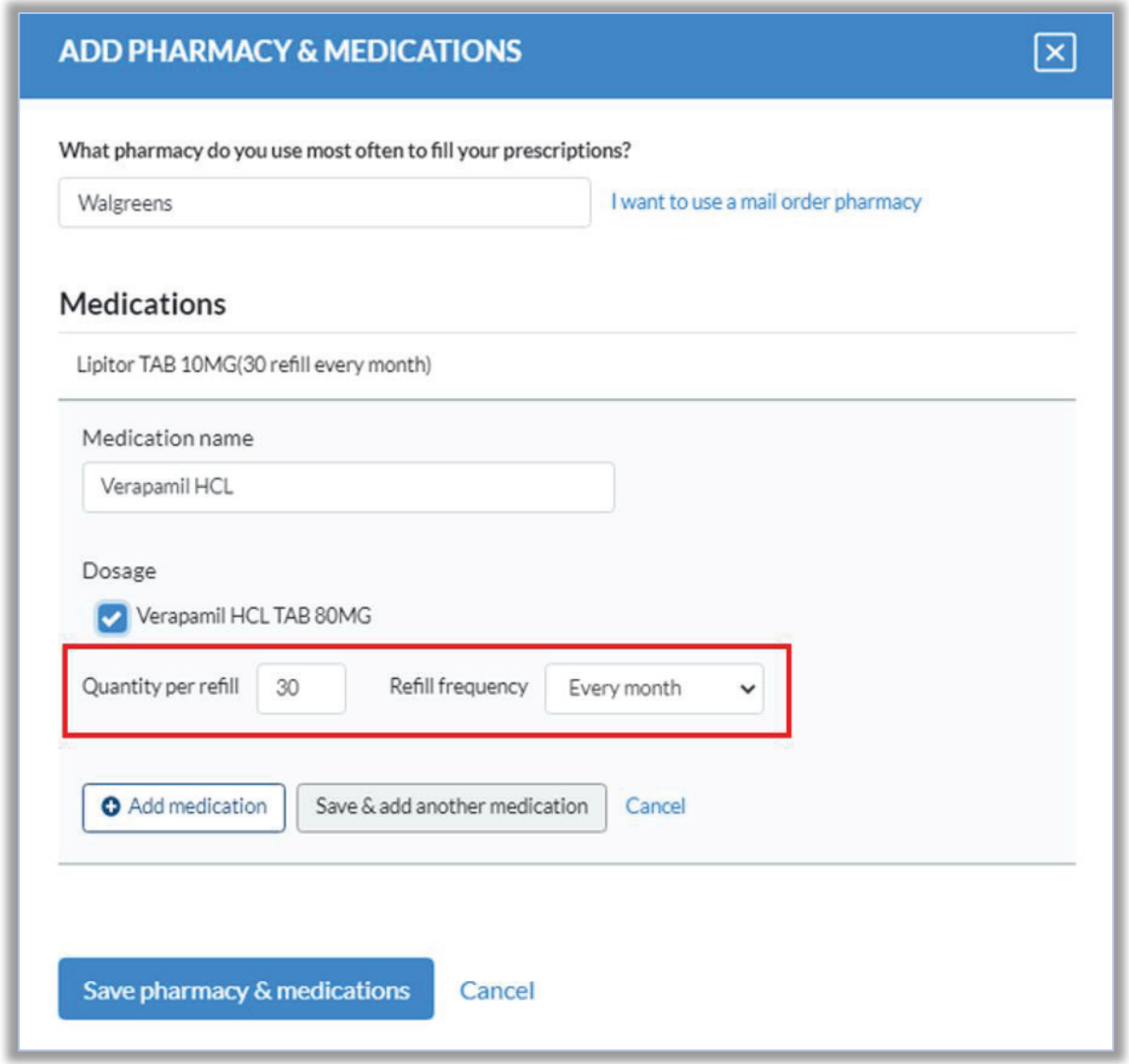
TIP: The most popular dosage will be highlighted on the screen.



Selecting Quantity

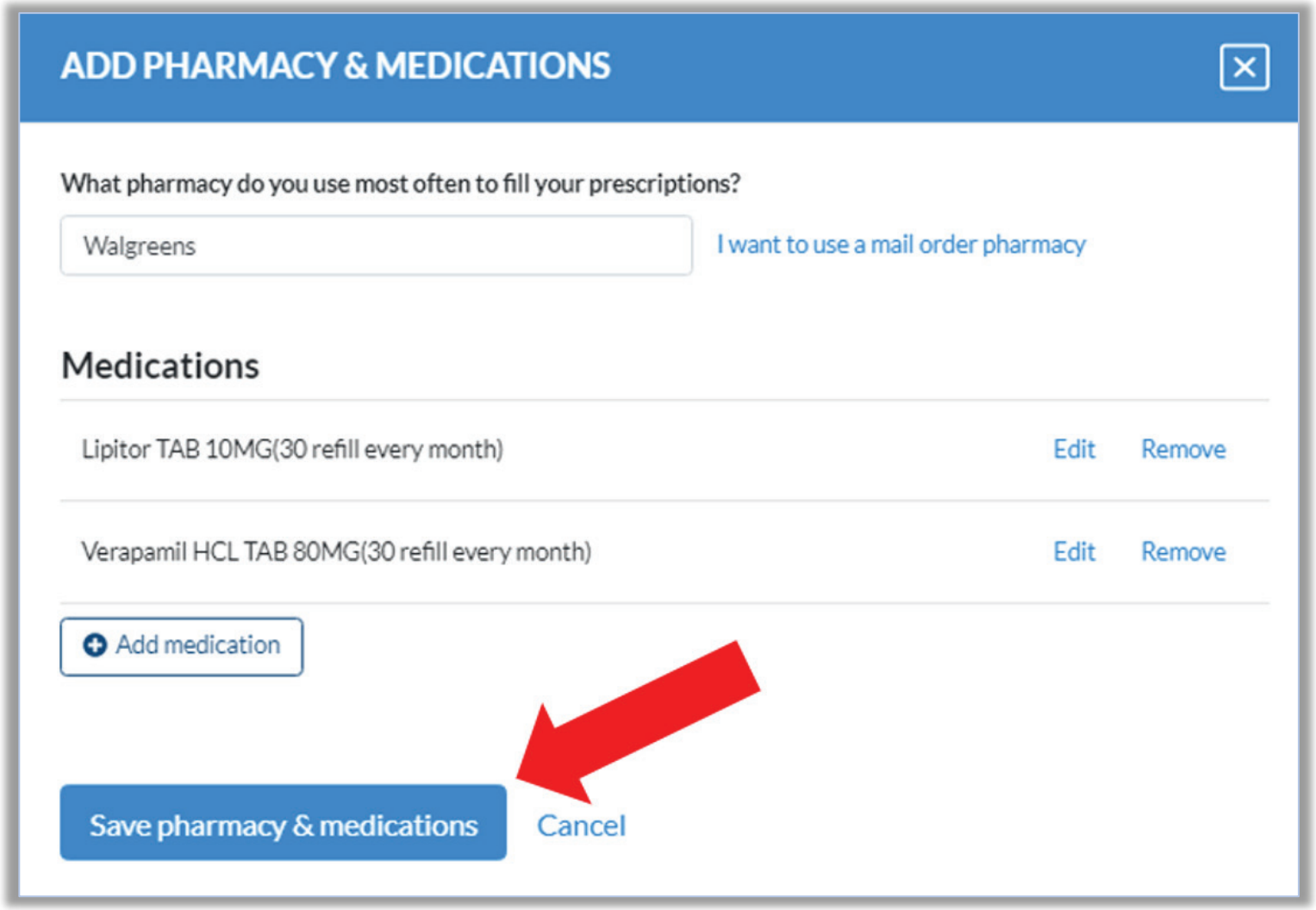
The agent will also be prompted to verify additional information for each added medication:

- Quantity per Refill
- Refill Frequency



Saving Medications

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



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

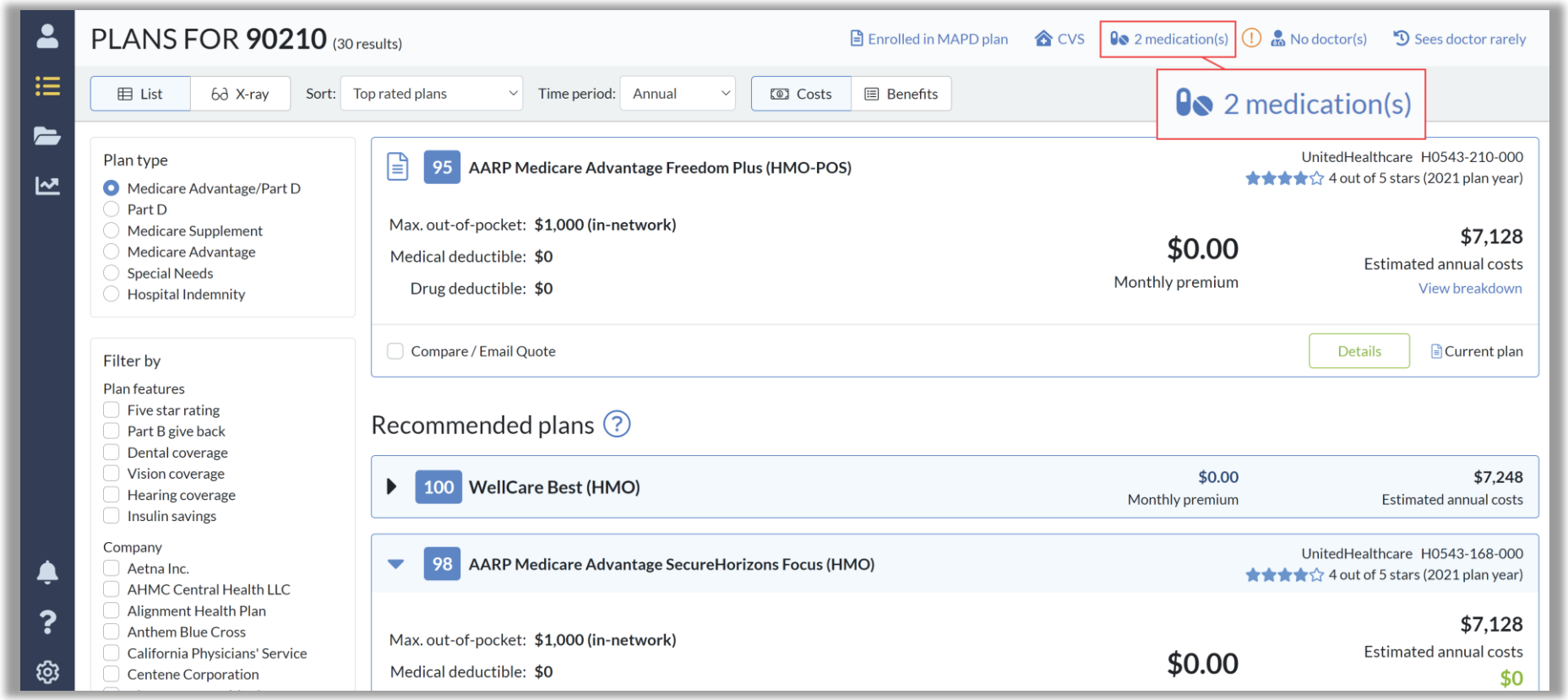
Do you receive Extra Help / Low Income Subsidy (optional)?

Yes	No	I don't know

Plans Page

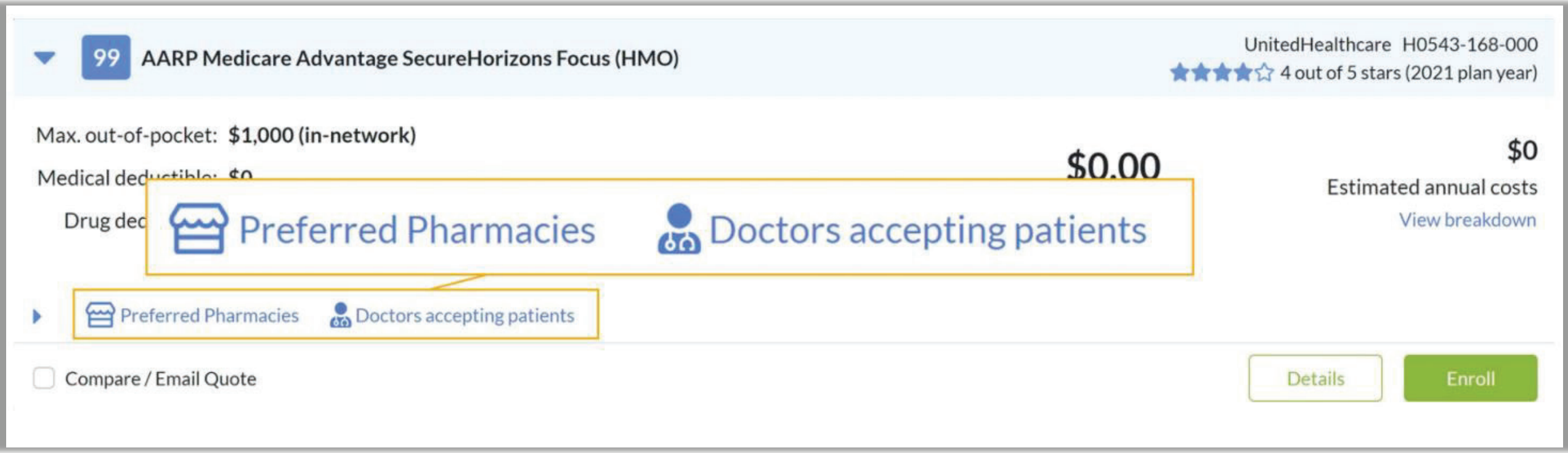
Plan Page – Access Drug Cabinet

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



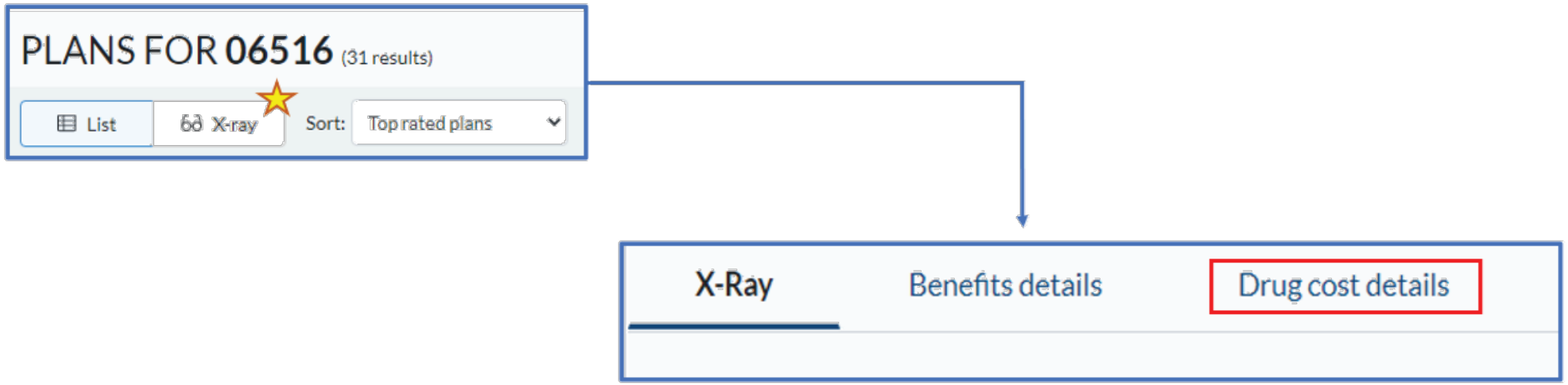
Preferred Pharmacy Search

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.



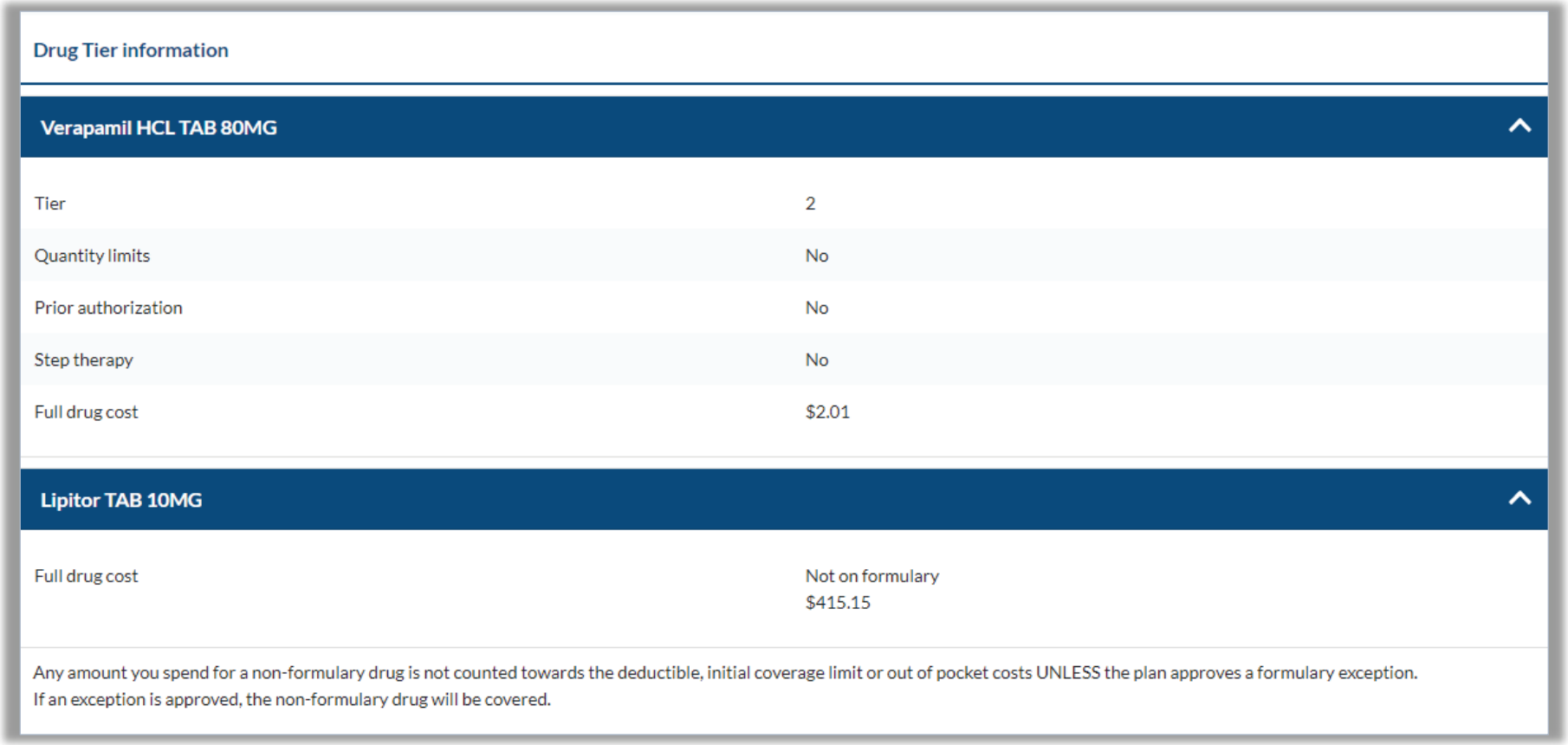
Plan X-Ray View

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

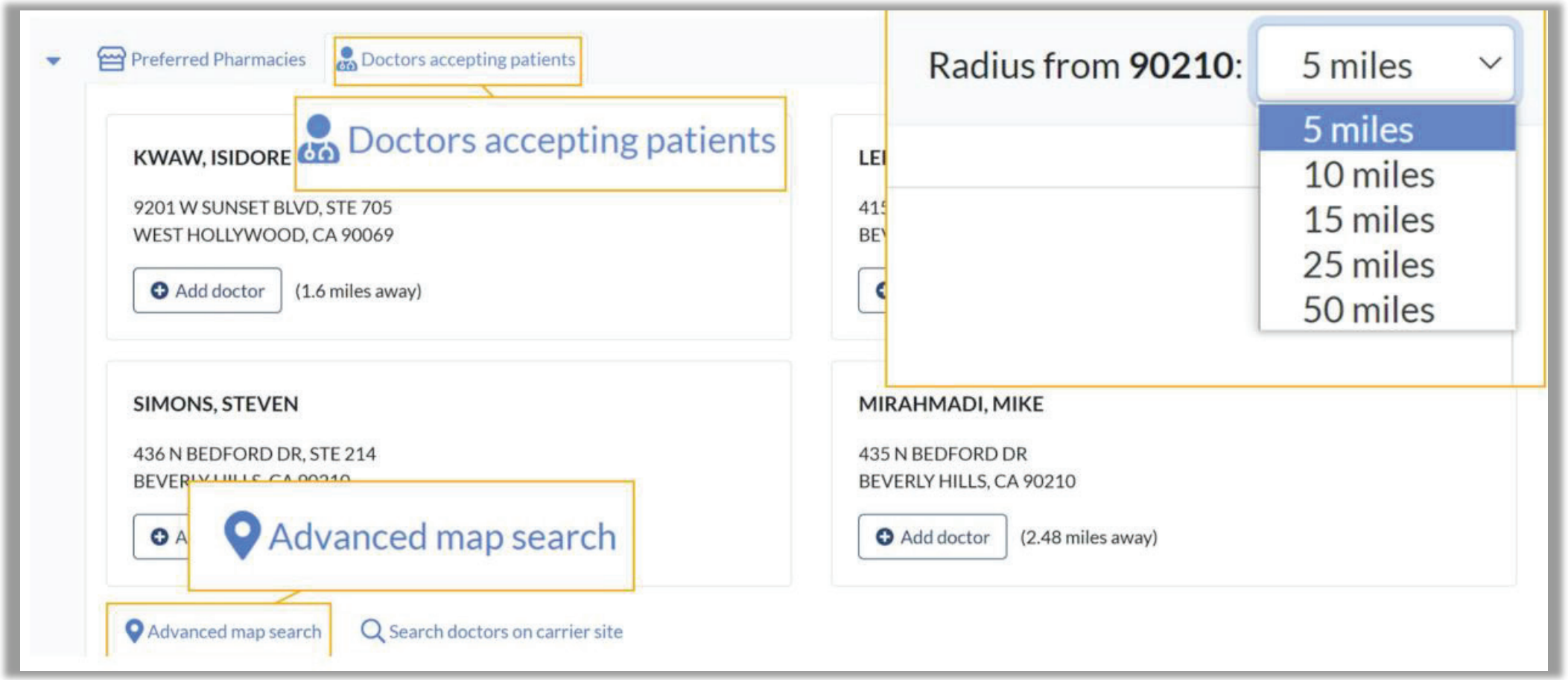
To find a New PCP:

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


Preferred Pharmacies
Doctors accepting patients
Doctors accepting patients
KWAW, ISIDORE
9201 W SUNSET BLVD, STE 705
WEST HOLLYWOOD, CA 90069
Add doctor
(1.6 miles away)
SIMONS, STEVEN
436 N BEDFORD DR, STE 214
Advanced map search
Advanced map search
Search doctors on carrier site
Radius from 90210:
5 miles
5 miles
10 miles
15 miles
25 miles
50 miles
MIRAHMADI, MIKE
435 N BEDFORD DR
BEVERLY HILLS, CA 90210
Add doctor
(2.48 miles away)

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)*

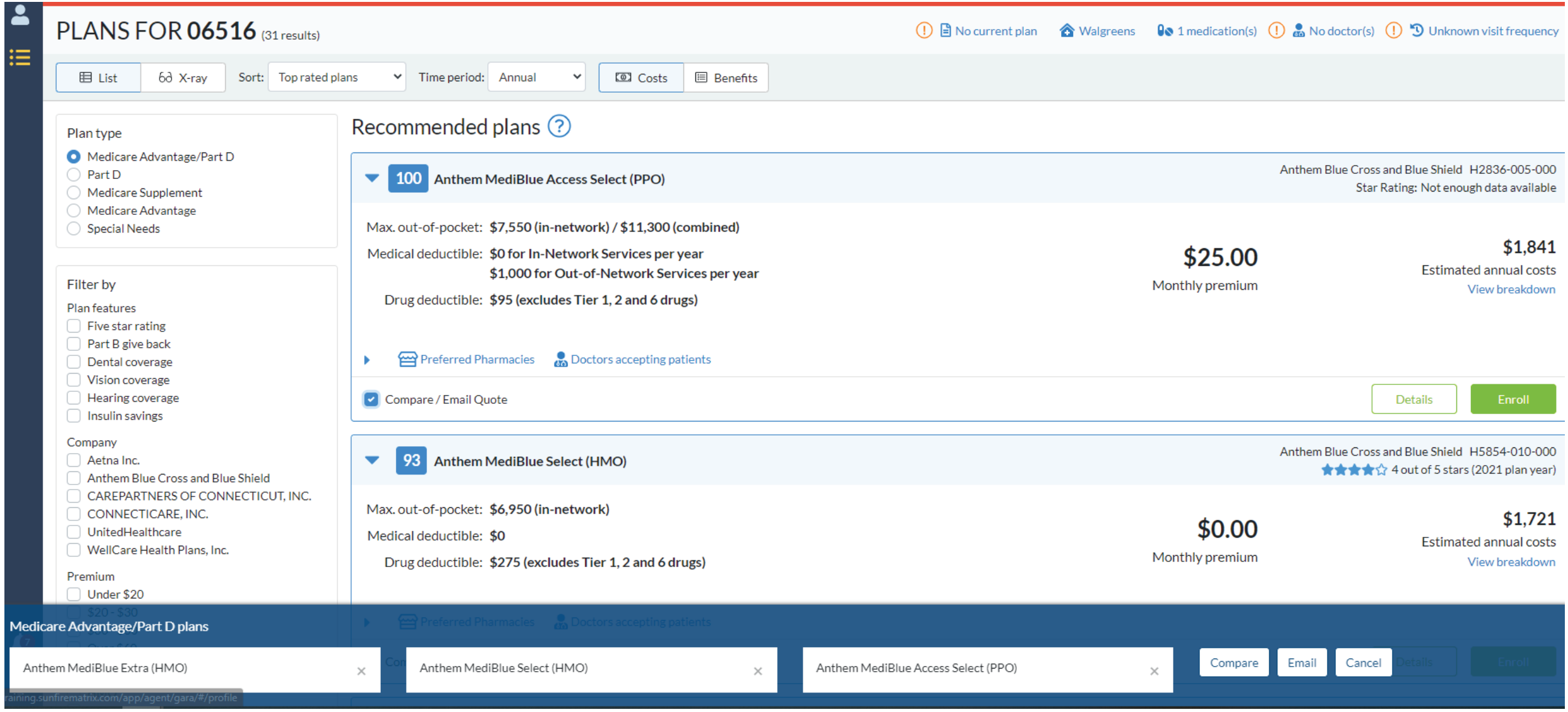
Drug cost details offers information on the tiers, quantity limits, costs, prior authorization (and more) for the medications entered for the Customers.

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



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.

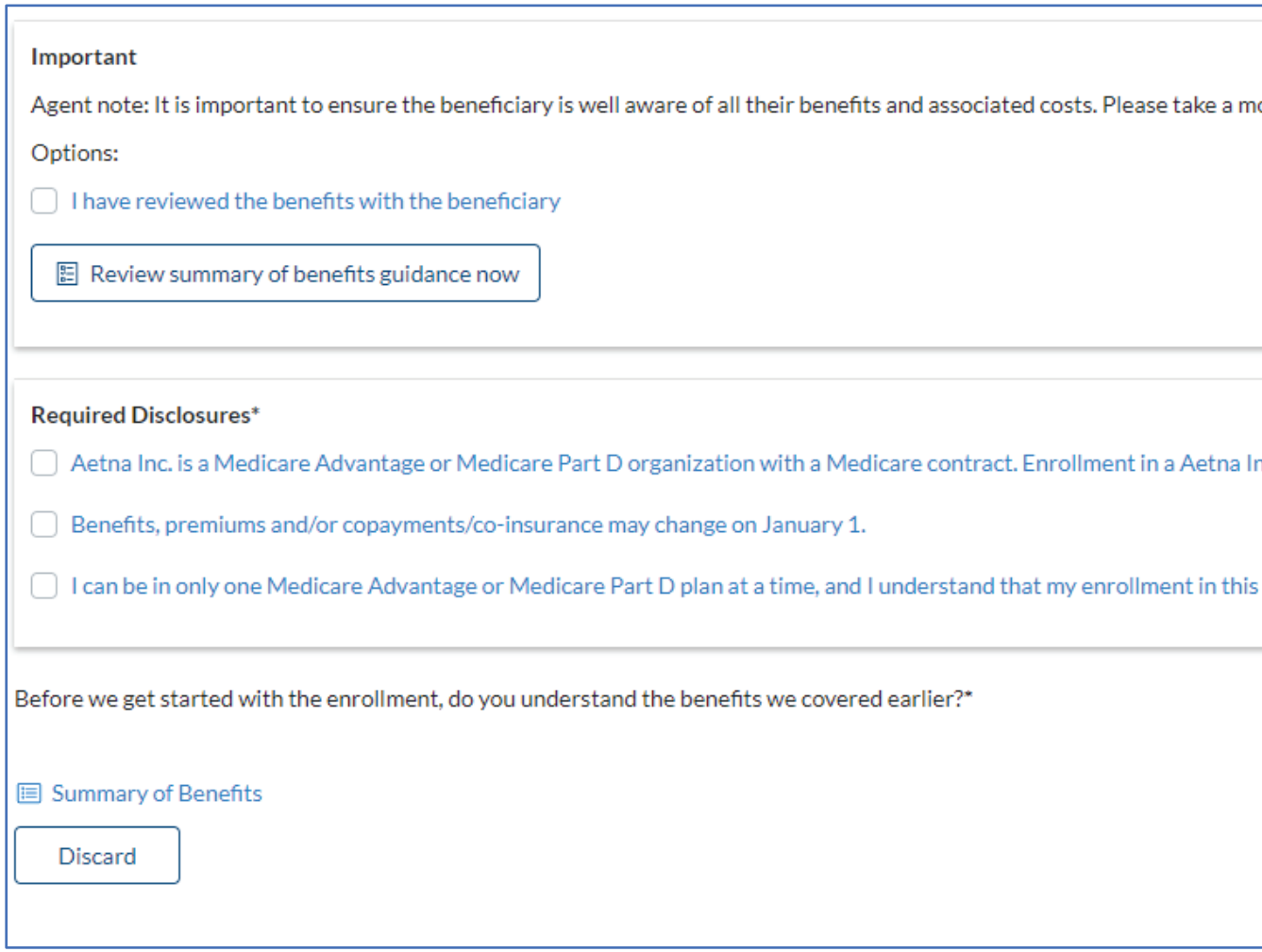
Enrollment Tracking : Enrollment code, Dashboard, Reports, or Notifications. (*Green means Go*).

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.

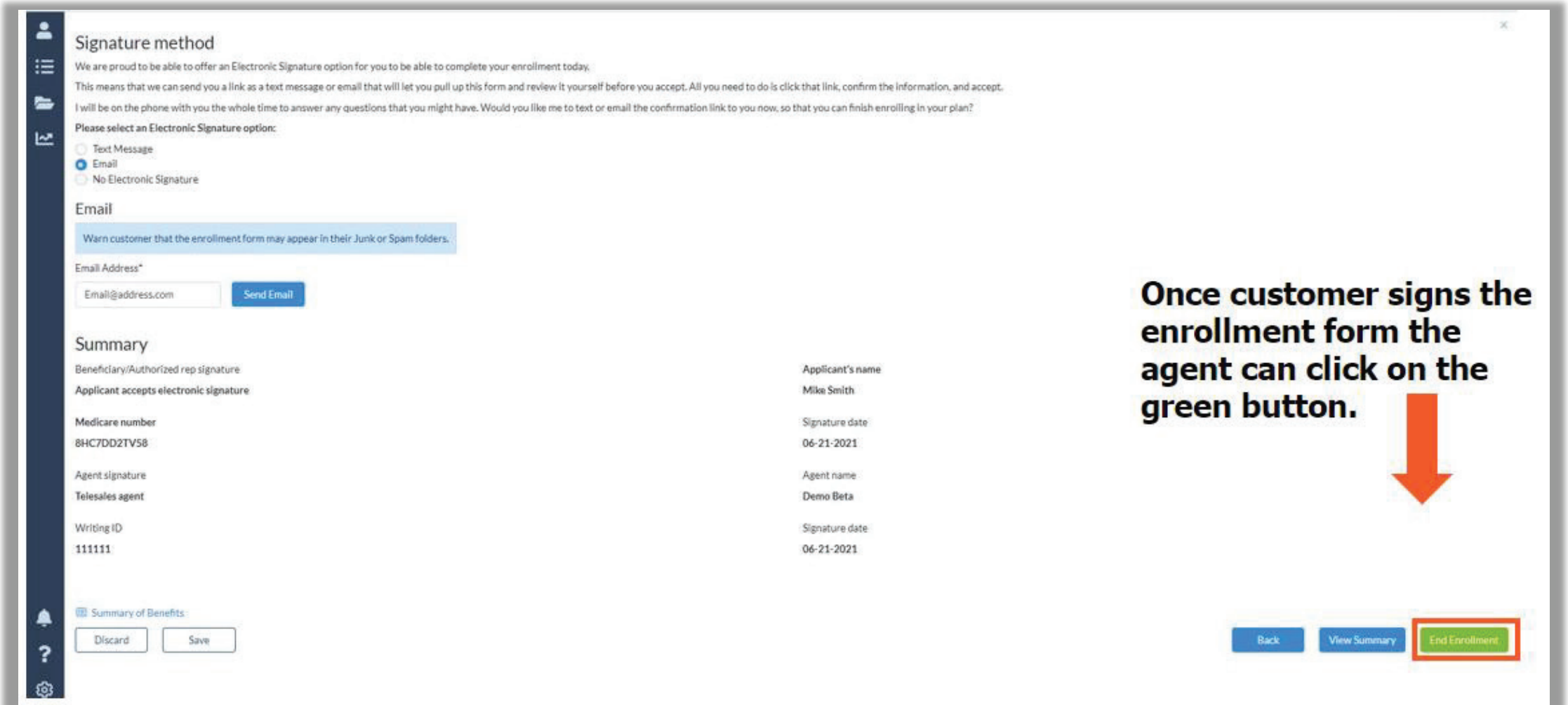
Be sure to select **all** the answers to the questions that will be prompted by the system.

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



Signature Page

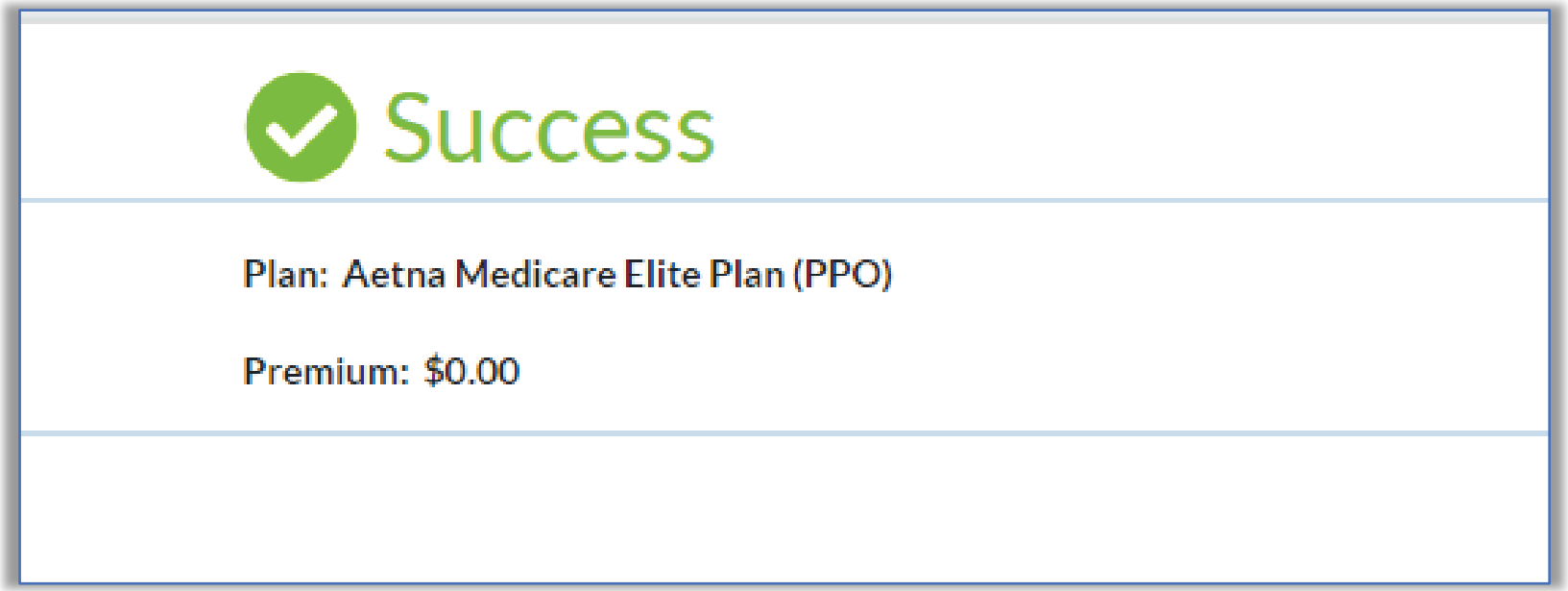
On the final page of the Enrollment Form, Agent can select the signature method. Then click "**END ENROLLMENT**" to complete the application.



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.



Thank You!