



Medicare Enrollment Portal

Broker Training

Module Description

This module is designed to provide an overview of the Medicare Enrollment Portal:

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Overview

Scope of
Appointment
(SOA)

Application-
Getting Started

Send a Quote

Enroll a
Beneficiary

Locating the Medicare Enrollment Portal

oscar

Individual book **Medicare book** Menu

Welcome

Broker

NPN:

Writing number: none

My Details

Update your account information, settings and preferences.

Basic details >

Account password >

Marketing materials preferences >

Get paid commissions >

Start Selling

Complete these items before you write your first policy.

Upload proof of E&O coverage >

Sign producer agreement >

Get appointed to Sell IFP >

Get certified to sell Medicare >

Agency details

Manage your agency's details and payment preferences.

Agency details >

After logging into the Broker Portal, locate the Medicare book from the top right corner.
NOTE: The blue checkmark will indicate that section is complete and you are ready to sell.

Medicare Enrollment Portal Login

Access the 2022 [Medicare Enrollment Portal](#)

Note: Save the URL in your browser “bookmarks” for easy, future access.

Health First Health Plans
Advent Health Advantage Plans

Welcome
Log in and get started

Username

Password

Log In

[Forgot password](#)

No account? Contact your manager to get access.

Welcome to Health First Health Plans/AdventHealth Advantage Plans

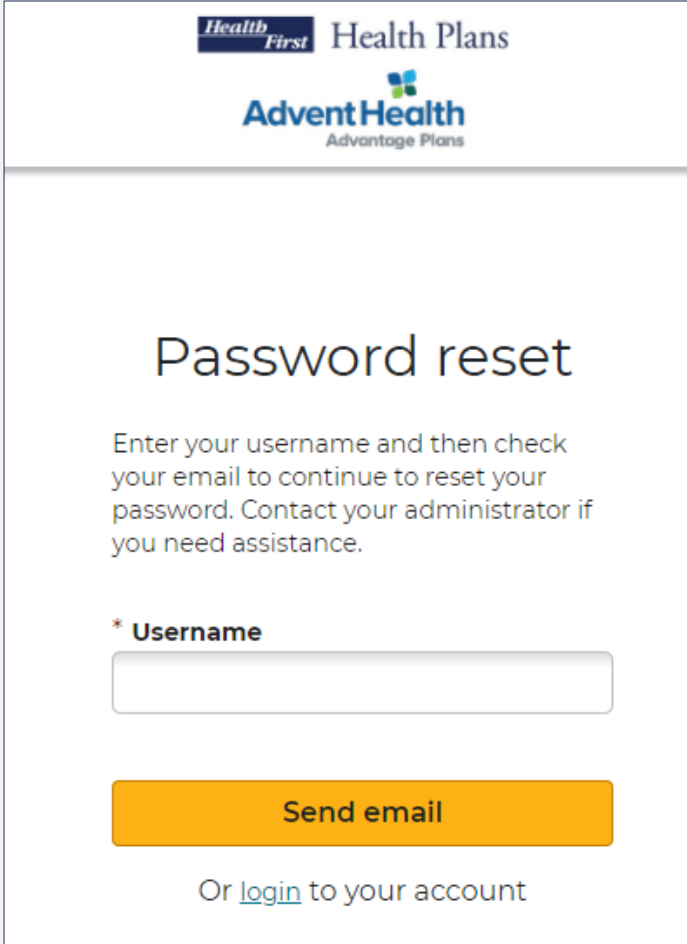
One shopping | One Location | One administration

- Medicare shopping and enrollment tools
- Present plan options and accurately calculate drug costs
- Capture leads and track their status through enrollment
- Manage all your applications through one portal

Initial Login, Reset, Forgot Password

As a broker, the first time you log in, you will need to use the Forgot Password link. This link is also used if you forget your password or wish to reset it.

- Click the **Forgot Password** link.
- Enter your NPN in the ***Username** field.
- Click **Send email**
- Log into email & verify email



The screenshot shows the 'Password reset' page for Health First Health Plans. At the top, there are logos for 'Health First Health Plans' and 'Advent Health Advantage Plans'. The main heading is 'Password reset'. Below it, a message reads: 'Enter your username and then check your email to continue to reset your password. Contact your administrator if you need assistance.' There is a text input field labeled '* Username'. Below the field is a yellow button labeled 'Send email'. At the bottom, there is a link that says 'Or [login](#) to your account'.

Search Beneficiaries

After logging in, the **Search Beneficiary** screen will display.

Use the top navigation bar to:

- **Search Profile**
- **Create a New Profile**
- **Access your Broker Profile**

The screenshot shows the 'Search beneficiaries' interface. At the top, there is a navigation bar with the 'Health First Health Plans' logo on the left and a 'Contact us' link on the right. Below the logo is the 'Advent Health Advantage Plans' logo. A red box highlights the top navigation area, which includes a search bar with a magnifying glass icon and the text 'Search profile', a 'New profile' button with a plus icon, a user profile icon, and a dropdown menu labeled 'brokertest'. The main content area is titled 'Search beneficiaries' and contains several input fields arranged in a grid. The fields are: 'First name', 'Last name', 'Date of birth', 'Phone number', 'Email address', 'Confirmation number', 'MBI', 'Application start date', 'Application end date', and 'Agent username'. A large grey button labeled 'Search profiles' is located at the bottom right of the form area.

Top Navigation Broker Profile

View and edit **your account information** and/or logout of the portal.

Username: this field will always be your National Producer Number (NPN).

Account Overview: Broker demographic overview including username and password.

Logout of the portal

Health First Health Plans
Advent Health Advantage Plans

Search profile
New profile
brokertest

Account overview

brokertest brokertest
Logout
Account overview

My shopping link
Send your personalized link to the client to get them started with shopping for plans. Don't worry, you will get credit if the consumer enrolls in any of these plans.
Copy link

Personal information

* First name brokertest	* Last name brokertest	Email address	Phone number
Address	City	State	ZIP code

Account information

* Username brokertest	Password Include at least 1 capital letter, 8 characters and 1 number	NPN NPNTesT	Agency ID AgencyIDTest
Agency name AgencyIDTest	* Agent ID brokertest	* Expiration date 12/31/9999	* Site access Revoke access This user has access to the site.
* Account status Active Inactive	* Role Enroller_Admin May create/view all prospect profiles on all agent and agency site accounts and enroll		

Top Navigation

Search Profile

Search for an **existing beneficiary profile** in the system. If a beneficiary profile exists, clicking this option will enable you to access the beneficiary's saved information, including any enrollments in progress.

To search for a beneficiary:

1. Enter search parameters
2. Click **Search profiles**
 - **Registrant** status indicates a beneficiary who has not started an enrollment application.
 - **Applicant** status indicates a beneficiary who has either started or completed an enrollment application
 - If **no search results** are found, create a new profile and the search criteria that was entered will be automatically pre-filled into the New Profile.

The screenshot shows the top navigation bar of the Health First Advantage Plans system. The 'Search profile' dropdown menu is highlighted with a red box. Below the navigation bar, the page title is 'Search beneficiaries'. The form contains several input fields: First name, Last name, Date of birth, Phone number, Email address, Confirmation number, MBI, Application start date, Application end date, and Agent username. The 'Search profiles' button is highlighted with a red box.

Top Navigation Beneficiary

After searching for an existing beneficiary profile in the system and selecting the client you would like to review, this beneficiary name will populate in the top navigation with a set of drop-down options to work from.

Health First Health Plans
Advent Health Advantage Plans

Search profile New profile Jennifer Cole Contact us brokertest

Profile

Profile
Scope of Appointment
Preferences
Health
Prescriptions
Pharmacy
Plans
Cart

Meet with me today. Here are plans that I think will meet your needs below.
- brokertest brokertest
Created 03/23/2020

Temporary Quick Quote Password for Jennifer Cole: '2mML9EvS'
- brokertest brokertest
Created 03/23/2020

Add note

Tasks

You have no tasks for this profile

Add task

Save

Personal information

*ZIP code 32955 Brevard, FL

* First name Jennifer * Last name Cole Date of birth MM/DD/YYYY

Email address beneficiary@hf.org Phone number (321) 555-4444

Home address

Address 1 Address 2

City State

Sales information

Is the sales contact different from the beneficiary?
Yes No

Top Navigation New Profile

If a beneficiary profile does not exist in the system, follow these steps:

To create a **New Profile**:

1. Click **New Profile**
2. Enter **required information**
3. Click **Save**

After a New Profile is created, you can:

- Edit the beneficiary's information
- Shop for plans
- Add preferences information
- Send a Scope of Appointment
- Send a Quick Quote
- Start Enrollment

Health First Health Plans
Advent Health Advantage Plans

Search profile New profile brokertest Contact us

Profile

Personal information

*ZIP code

* First name * Last name Date of birth

Email address Phone number

Home address

Address 1 Address 2

City State

Sales information

Is the sales contact different from the beneficiary?
 Yes No

Save

< Previous Add preferences > Continue to SOA Continue to plans

Notes
You have no notes for this profile
Add note

Tasks
You have no tasks for this profile
Add task

Profile Notes

Notes can be added to track:

- Sending electronic SOAs
- Enrollment applications sent via email or text

Some actions agents perform in the system generate notes automatically. For example, when agents send an electronic scope of appointment form, the email and date are added as a note.

Click **Save** after entering any Notes.

Health First Health Plans
Advent Health Advantage Plans

Search profile New profile brokertest Contact us

Profile

Personal information

*ZIP code

* First name * Last name Date of birth

Email address Phone number

Home address

Address 1 Address 2

City State

Sales information

Is the sales contact different from the beneficiary?
 Yes No

Save

Notes
You have no notes for this profile
[Add note](#)

Tasks
You have no tasks for this profile
[Add task](#)

< Previous Add preferences > Continue to SOA Continue to plans

Profile Tasks

Tasks allow you to create reminders to perform actions to assist a beneficiary. These include:

- Check SOA completion
- Email materials or plan documents to beneficiary
- Upload/view SOA's from desktop
- Document a scheduled meeting with the beneficiary

Click **Save** after entering any Tasks.

Click **Continue to plans** or **Continue to SOA**, below the profile form.

Health First Health Plans
Advent Health Advantage Plans

Search profile ▾ New profile ▾ brokertest ▾

Profile

Personal information

*ZIP code

* First name * Last name Date of birth

Email address Phone number

Home address

Address 1 Address 2

City State

Sales information

Is the sales contact different from the beneficiary?

Notes

You have no notes for this profile
[+ Add note](#)

Tasks

You have no tasks for this profile
[+ Add task](#)

[< Previous](#) [Add preferences >](#)

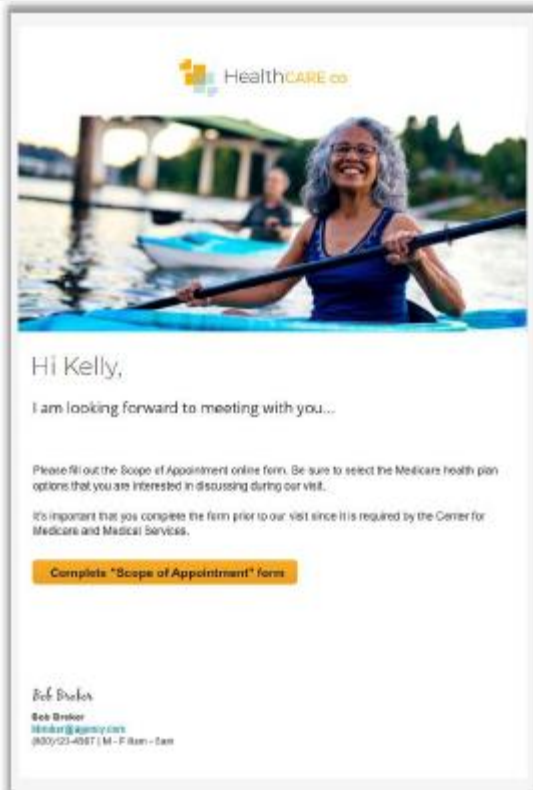
Scope of Appointment

- View uploaded SOA's
- Upload new SOA's received
- Complete an SOA after the appointment
- SOA's sent via email or text will be documented in the **Notes** section

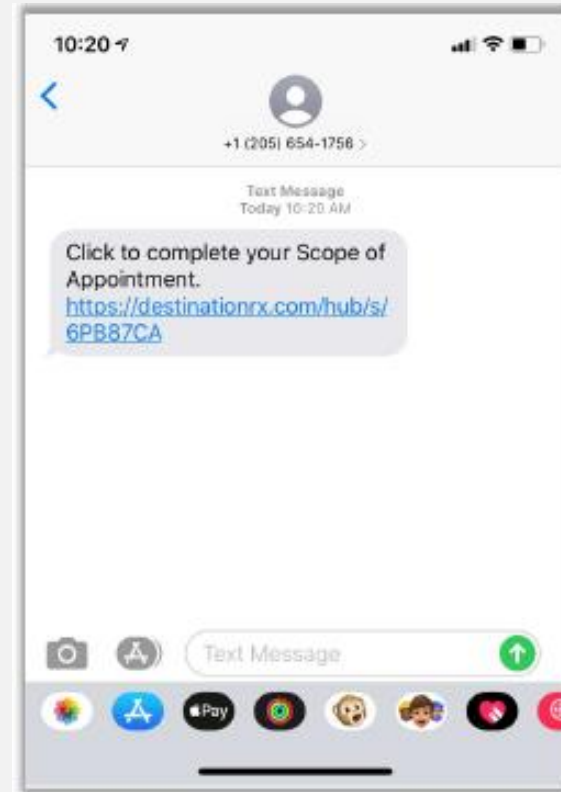
The screenshot shows a web interface for 'Health First Health Plans' and 'Advent Health Advantage Plans'. The page title is 'Scope of Appointment'. A message states: 'A Scope of Appointment is required for all sales appointments. Submit the SOA once you have received it from the beneficiary.' Below this, there is a section for 'SOAs' which indicates 'You have no SOAs for this profile'. There are two input sections: 'Email address' with an 'Email SOA' button, and 'Phone number' with a 'Text SOA' button. At the bottom, there are navigation buttons: '< Previous', 'Add preferences', and 'Continue to plans'.

Scope of Appointments Sent to the Beneficiary

Sample Email




Sample Text



Scope of Appointment Received by the Beneficiary

- This is a sample form the Beneficiary will see when the link in the email or text is selected.
- Agent information will appear in upper right of the header.
- The Beneficiary will choose options from the form to discuss at the appointment, complete all required fields, and submit the form.

 **Health Plans**
AdventHealth
Advantage Plans

Licensed Agent
brokertest

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 initialed 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?*

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 authorized individual (as described above), this submission certifies that 1) this person is authorized under State law to complete the Scope of Appointment form, and 2) documentation of this authority is available upon request by Medicare.

CMS Pending Approval

CMS Pending Approval

Scope of Appointment Completed by the Beneficiary

The Beneficiary will receive a confirmation message once they have successfully submitted their completed SOA.

The screenshot shows a web interface for Health First Health Plans. At the top left, the logo for Health First Health Plans and Advent Health Advantage Plans is visible. At the top right, it says "Licensed Agent brokertest". The main heading is "Scope of Appointment". A green confirmation box with a checkmark icon contains the text: "Thank you, your scope of appointment has been submitted. Please close your browser. Your broker will get in touch with you soon." Below this, under the heading "We'll discuss:", there is a bullet point: "Medicare Advantage Plans Part C and Cost Plans". Under the heading "Make sure you have the following for our meeting:", there are three bullet points: "Medicare card", "All medications", and "List of all your current physicians along with their phone numbers and addresses". To the right of the text is a sample Medicare Health Insurance card for John L. Smith, with a large "SAMPLE" watermark. The card includes the Medicare number 1EG4-TES-MK72 and effective dates for Hospital (Part A) and Medical (Part B) coverage, both starting on 03-01-2016. At the bottom left of the screenshot, it says "CMS Pending Approval".

Agent Completion of the Scope of Appointment

- The agent will receive a notification email (if the agent has an email on file) that the beneficiary has completed their portion of the form.
- The agent will log into the system, search for that beneficiary, navigate to the SOA page, and click **Complete form**.

Health First Health Plans

Advent Health Advantage Plans

Contact us

Search profile ▼ New profile ▼ Jennifer Cole ▼ brokertest ▼

Scope of Appointment

A Scope of Appointment is required for all sales appointments. Submit the SOA once you have received it from the beneficiary.

SOAs

✓ Completed by Jennifer Cole on 04/09/2021	• Medicare Advantage Plans Part C and Cost Plans	Complete form
--	--	---------------

Print consumer form | Upload

Agent Completion of the Scope of Appointment

This is a sample form the agent will see when they click to complete their portion after received back from the beneficiary.

Advent Health Advantage Plans

Search profile | New profile | Jennifer Cole | brokertest

Scope of Appointment

A Scope of Appointment is required for all sales appointments. Submit the SOA once you have received it from the beneficiary.

SOAs

Completed by Jennifer Cole on 04/09/2021 • Medicare Advantage Plans Part C and Cost Plans [Close form](#)

[print consumer form](#) | [Upload](#)

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*
brokertest

Agent Last Name*
brokertest

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.*

Date Appointment Completed*
04/09/2021

By checking this box, I confirm the information represented here is true and accurate. I authorize my signature on the Scope of Appointment form using this information.

[Submit broker form](#)

Uploading a Scope of Appointment

To upload an SOA that was completed outside of the system, click the **Upload** link on the SOA page and upload the document.

Health First Health Plans
Advent Health Advantage Plans

Contact us
Search profile | New profile | test test | brokertest

Scope of Appointment

A Scope of Appointment is required for all sales appointments. Submit the SOA once you have received it from the beneficiary.

SOAs

You have no SOAs for this profile

Print consumer form | **Upload**

Email address
 Email SOA

Phone number
(123) 456-7890 Text SOA

< Previous Add preferences Continue to plans

Getting Started

Health First Health Plans
AdventHealth Advantage Plans

Search profile | New profile | Jennifer Cole | brokertest | Contact us

Scope of Appointment

A Scope of Appointment is required for all sales appointments. Submit the SOA once you have a beneficiary.

SOAs

- Completed by Jennifer Cole on 04/09/2021 • Medicare Advantage Plans Part C and Cost Plans

Print consumer form | Upload

Email address: Jennifer.Cole@hf.org | Email SOA

Phone number: | Text SOA

< Previous | Add preferences | Continue to plans

After the SOA is complete - get started with adding preferences, reviewing plans, and starting enrollment.

1. From the Beneficiary's tab, click **Preferences**
2. Or click the **Add preferences** button from the bottom of the SOA page.

Getting Started

Health First Health Plans
AdventHealth Advantage Plans

Search profile New profile Jennifer Cole brokertest Contact us

Get Started

- **Get Started**
- Health
- Prescriptions
- Pharmacy

Go to plans >

*ZIP code
32955 Brevard, FL

These optional questions help us estimate your potential costs.

What coverage type are you interested in? (Optional)

Medical only Prescription drug Medical and prescription drug I don't know

< Previous Skip > **Continue**

On the **Get Started** page, agents can provide the beneficiary's zip code, select the **interested coverage** type and the **Low-Income subsidy** amount.

Providing the beneficiary's subsidy information allows the system to adjust premiums, prescription deductible and prescription copays in the plan cost estimates.

While working with a beneficiary profile, agents can access this page by selecting **Preferences** from the drop-down option.

Getting Started - Health

Entering information about the beneficiary's location, age range, and health provides a list of available plans and calculates estimated out-of-pocket medical expenses.

While working with a beneficiary profile, agents can access this page by selecting **Health** from the drop-down option.

The screenshot shows the 'Health Plans' selection interface. At the top, there is a navigation bar with the 'Health First' logo, 'Advent Health Advantage Plans' logo, a search bar, and user profile information for 'Jennifer Cole'. The main heading is 'Health' with a heart icon. Below this, a message states: 'Your health and age will be used to calculate your estimated cost. It will not affect your premium.' A progress bar is visible, with the first step 'Get Started' completed and the second step 'Health' active. The 'Health' section is divided into three categories: 'Generally healthy' (No major illnesses, Less than 2 prescriptions for an illness, Less than 2 visits to primary care), 'Some health needs' (Ongoing condition like diabetes, Regular prescription needs, 1 or more visits to a specialist), and 'Significant health needs' (Multiple prescriptions, Managing a serious condition, Multiple visits to specialists). Below this, there is a question 'How old are you?' with radio button options: 'Under 65', '65-69' (selected), '70-74', '75-79', '80-84', and '85+'. At the bottom, there are navigation buttons: '< Previous' and 'Skip > Continue'.

Getting Started - Prescriptions

It is recommended the beneficiary provide prescription drug information, as this allows agents and the beneficiary to understand if and how their drugs are covered and to provide a better out-of-pocket cost estimate.

Note: This step can be skipped by clicking **Skip** or **Continue** at the bottom of the page

While working with a beneficiary profile, agents can access this page by selecting **Prescriptions** from the drop-down option.

The screenshot displays the 'Prescriptions' section of the Health First Advantage Plans interface. At the top, there is a navigation bar with the Health First logo, 'Advent Health Advantage Plans', and user information for Jennifer Cole. A search bar is present for finding profiles. The main content area features a sidebar with navigation options: 'Get Started', 'Health', 'Prescriptions' (highlighted), and 'Pharmacy'. The 'Prescriptions' section includes a search bar and a list of drugs. One drug, 'colchicine', is currently being configured. The user has selected 'colchicine TAB 0.6MG' with a quantity of 30 tablets per month. Below this, a list of existing prescriptions shows 'atorvastatin calcium TAB 10MG' with 30 tablets per month. At the bottom, there are navigation buttons: 'Previous', 'Continue', and 'Add'.

Getting Started - Pharmacy

The **Pharmacy** page allows agents to enter the place where the beneficiary fills prescriptions. This allows the system to provide more accurate prescription pricing.

Note: This step can be skipped by clicking **Skip** or **Continue** at the bottom of the page

While working with a beneficiary profile, agents can access this page by selecting **Pharmacy** from the drop-down option.

The screenshot shows the 'Pharmacy' page in the Health First Advantage Plans system. The page header includes the Health First logo and navigation options like 'Search profile', 'New profile', and user information. The main heading is 'Pharmacy' with a sub-heading 'Add your pharmacy to get the most accurate drug price estimates.' On the left, there is a sidebar with navigation options: 'Get Started', 'Health', 'Prescriptions', and 'Pharmacy' (which is selected). Below the sidebar is a 'Go to plans >' link. The main content area features a search for ZIP code '32901'. Below the search, there is a list of three pharmacies, each with an 'Add pharmacy' button: 1. Walmart Pharmacy 10-5366 (3550 South Babcock Road, Melbourne, FL 32901), 2. Health First Family Pharmacy Home Infusion (1350 South Hickory Street, Melbourne, FL 32901), and 3. CVS Pharmacy #05439 (15 E New Haven Ave, Melbourne, FL 32901). To the right of the list is a map showing the locations of these pharmacies in Melbourne, FL. At the bottom of the page, there are navigation buttons: 'Previous', 'Skip >', and 'Continue'.

Plans

The **Plans** page allows agents to view all the plans that are available in the beneficiary's service area.

The available plans, plan pricing, and estimated costs are impacted by several factors including the beneficiary's location, subsidy eligibility, prescription drugs, and pharmacy selected.

Plan cost estimates are more accurate with more information entered for the beneficiary.

The screenshot displays the 'Health First Advantage Plans' website interface. At the top, it shows the user's profile as 'Jennifer Cole' and the number of plans available: '4 plans available in 32955'. Below this, there are three filter buttons: 'Medicare Advantage Prescription Drug Plans' (3 plans), 'Medicare Advantage Plans' (1 plan), and 'Prescription Drug Plans' (0 plans). A note states: 'Medicare Advantage Prescription Drug Plans bundle the benefits of a Medicare Advantage Plan and a Prescription Drug Plan. Benefits include medical expenses and prescriptions.' The main content area features a 'Sort' dropdown set to 'Total Estimated Annual Cost' and a list of four plan cards. Each card includes a star rating, a 'Star rating' link, and buttons for 'Plan details', 'Add to cart', and 'Add to quote'. A summary bar at the bottom of each card shows 'Prescriptions' (1 of 1 covered), 'Pharmacy' (Walmart Pharmacy, 10-ES66, Standard/Preferred in-network), 'Est. drug cost' (\$0), and 'Total est. annual cost'.

Plan Name	Medical Deductible	Maximum Annual Out Of Pocket	Monthly premium	Total est. annual cost
Health First Rewards Plan	\$0	\$5,500	\$0.00	\$971
Health First Value Plan	\$0	\$4,950	\$33.00	\$1,192
Health First Classic Plan	\$0	\$3,750	\$97.00	\$1,595

Compare Plans

Agents can compare up to 3 plans side by side on the Compare Plans page.

Check the boxes of the plans you'd like to compare, then click, **Compare now**.

Health First Health Plans

Advent Health Advantage Plans

Contact us

Search profile New profile Jennifer Cole brokertest

4 plans available in [32955](#)

Medicare Advantage Prescription Drug Plans 3 plans

Medicare Advantage Plans 1 plan

Prescription Drug Plans 0 plans

Medicare Advantage Prescription Drug Plans bundle the benefits of a Medicare Advantage Plan and a Prescription Drug Plan. Benefits include medical expenses and prescriptions.

Sort: Total Estimated Annual Cost

Filters

Clear all

Plan subtypes

HMO

HMOPOS

Preferences

Get Started Add

Health Edit

- Generally healthy
- 65-69

Prescriptions Edit

atorvastatin c...

Pharmacy Edit

Walmart Pharma...

Health First Rewards Plan Compare now

★★★★☆ Star rating

Medical Deductible \$0

Maximum Annual Out Of Pocket \$5,500

Monthly premium \$0.00

Plan details Add to cart Add to quote

Prescriptions 1 of 1 covered

Pharmacy Walmart Pharmacy 10-5366 Standard In-network

Est. drug cost \$0

Total est. annual cost \$971

Health First Value Plan Compare now

★★★★☆ Star rating

Medical Deductible \$0

Maximum Annual Out Of Pocket \$4,950

Monthly premium \$33.00

Plan details Add to cart Add to quote

Prescriptions 1 of 1 covered

Pharmacy Walmart Pharmacy 10-5366

Est. drug cost \$0

Total est. annual cost \$1,192

Send a Quote to the Beneficiary

Agents can add specific plans to a quote and email to their beneficiary by clicking **Add to quote**.

The selected plans will list at the top. When you are ready to email to your beneficiary click, **Send quote**.

A message window will display asking for the beneficiary's email and message to accompany the quote. Click **Send quote** when finished.

The screenshot displays a quote summary at the top with three categories: Medicare Advantage Prescription Drug Plans (3 plans), Medicare Advantage Plans (1 plan), and Prescription Drug Plans (0 plans). Below this, a summary row shows 'Health First Rewards Plan' for \$0.00 and 'Health First Value Plan' for \$33.00, with a 'Send quote' button highlighted in a red box. A modal window titled 'Send quote' is open, containing an 'Email address' field with 'beneficiaryemail@yahoo.com', an 'Additional message' field with the text 'Please review this quote at your earliest convenience. Let me know if you have any questions.', and a 'Plan(s) included' section listing 'Health First Rewards Plan' and 'Health First Value Plan'. The modal has 'Cancel' and 'Send quote' buttons. In the background, a list of plans is visible, with the 'Add to quote' button for the 'Health First Classic Plan' highlighted in a red box.

Plan Name	Medical Deductible	Maximum Annual Out Of Pocket	Monthly Premium	Est. drug cost	Total est. annual cost
Health First Rewards Plan	\$0	\$5,500	\$0.00	\$0	\$971
Health First Value Plan	\$0	\$4,950	\$33.00	\$0	\$1,192
Health First Classic Plan	\$0	\$3,750	\$97.00	\$0	\$1,192

Send a Quote to the Beneficiary

When a quote is sent successfully, the beneficiary receives two emails that can be used to access the quote:

- One with the link to view the quote
- One with the access code

These are separate for security reasons because protected health information (PHI) is involved.

Hi Jennifer,


Please enter the authorization code you received to view the plan information we discussed.

* Authorization code

The authorization code was sent to you.

Continue

Health First Health Plans
AdventHealth
Advantage Plans



Hi Jennifer,

Please use the authorization code below when you are ready to view the plan information.

Note: This email is from a licensed sales agent
Single Use Email

Authorization code:

F5VCYLWY

brokertest brokertest
AgencyIDTest

Quote Authorization and Summary

Upon successful authentication, the beneficiary lands on the quote summary page.

The beneficiary will have access to **Add to cart** and continue to the enrollment process if they choose.

The links provided in the email contain the Agent ID, which ensures agents get credit for any enrollments that result from the Quote.

The screenshot shows the user interface for a quote summary. At the top, it displays the AdventHealth logo, the user's name 'Jennifer Cole', and the agent's name 'Jennifer Cole'. Below this is a large image of a man and a woman kayaking. The main content area is titled 'Hi Jennifer,' and includes a 'Review your information' section with fields for Name, ZIP code, and Email address. There is also an 'Add your preferences (Optional)' section with categories for Extra help, Health, Prescriptions, and Pharmacy. A 'Pick a plan' section highlights the 'Health First Rewards Plan' with details on medical deductible, annual out-of-pocket, and monthly premium. A summary table at the bottom shows coverage for prescriptions and pharmacy, with an estimated annual cost of \$971. Navigation buttons for 'Add to cart', 'Plan details', and 'Shop all available plans' are visible.

Health Plans
AdventHealth Advantage Plans
Licensed Agent Jennifer Cole
Cart
English
Contact us

Hi Jennifer,
Please review this quote at your earliest convenience. Let me know if you have any questions.

Review your information

Name Jennifer Cole	ZIP code 32955 Brevard, FL Edit	Email address jennifer.cole@hf.org
-----------------------	--	---------------------------------------

Add your preferences (Optional)

Extra help Add	Health Edit • Generally healthy • 65-69	Prescriptions Edit • atorvastatin calcium	Pharmacy Edit Walmart Pharmacy 10-5365
-----------------------------------	---	--	---

Pick a plan

Health First Rewards Plan
★★★★☆ [Star rating](#)

Medical Deductible \$0	Maximum Annual Out Of Pocket \$5,500	Monthly premium \$0.00
----------------------------------	--	----------------------------------

[Plan details](#) [Add to cart](#)

Prescriptions 1 of 1 covered	Pharmacy Walmart Pharmacy 10-5365 Standard In-network	Est. drug cost \$0	Total est. annual cost \$971
---------------------------------	---	-----------------------	--

[Shop all available plans](#)

Shop all coverage types

Medicare Advantage Prescription Drug Plans
Medicare Advantage Prescription Drug Plans bundle the benefits of a Medicare Advantage Plan and a Prescription Drug Plan. Benefits include medical expenses and prescriptions. [Shop Medicare Advantage Prescription Drug Plans >](#)

Medicare Advantage Plans
Medicare Advantage Plans replace your Part A and Part B Medicare coverage. Benefits include medical expenses, but not prescriptions. [Shop Medicare Advantage Plans >](#)

Start Enrollment Add to Cart

Once the beneficiary has made their plan selection, the agent can begin the enrollment process.

First, click **Add to cart** next to the plan option the beneficiary has selected.

Medicare Advantage Prescription Drug Plans bundle the benefits of a Medicare Advantage Plan and a Prescription Drug Plan. Benefits include medical expenses and prescriptions.

Health First Rewards Plan \$0.00 × Quote up to 3 plans [Send quote](#)

Sort: Total Estimated Annual Cost

Filters [Clear all](#)

Plan subtypes

- HMO
- HMOPOS

Preferences

- [Get Started](#)
Add
- [Health](#) Edit
• Generally healthy
• 65-69
- [Prescriptions](#) Edit
atorvastatin c...
- [Pharmacy](#) Edit
Walmart Pharma...

Plan Name	Medical Deductible	Maximum Annual Out Of Pocket	Monthly premium	Plan details	Add to cart	Remove from quote
Health First Rewards Plan ★★★★☆ Star rating	\$0	\$5,500	\$0.00	Plan details	Add to cart	Remove from quote
Prescriptions 1 of 1 covered		Pharmacy Walmart Pharmacy 10-5366 Standard In-network		Est. drug cost \$0	Total est. annual cost \$971	
Health First Value Plan ★★★★☆ Star rating	\$0	\$4,950	\$33.00	Plan details	Add to cart	Add to quote
Prescriptions 1 of 1 covered		Pharmacy Walmart Pharmacy 10-5366 Preferred In-network		Est. drug cost \$0	Total est. annual cost \$1,192	
Health First Classic Plan ★★★★☆ Star rating	\$0	\$3,750	\$97.00	Plan details	Add to cart	Add to quote

Start Enrollment

Add to Cart

Two options are offered:

- Enrollment can be completed through sending to the beneficiary to sign and submit
- Agent can complete and submit the enrollment on behalf of their beneficiary ONLY if the agent is sitting with their beneficiary to complete this enrollment.

Also, be sure to note if this beneficiary is an existing member. If yes, it will result in completion of a shorter enrollment form.

Click, **Continue to apply** to move ahead with the application.

Health First Health Plans

Advent Health Advantage Plans

Search profile | New profile | Jennifer Cole | brokertest | Contact us

Cart

Medicare Advantage Prescription Drug Plan

Health First Rewards Plan Monthly premium \$0.00

[View details](#) | [Change plan](#) | [Remove plan](#)

* How will you be completing this form?

* Are you an existing member?
If so, you will be able to complete a shorter form.

Total monthly premium \$0.00

[< Previous](#)



Contact Info



Benefit Info



Other Info



Agent Info

5

Review & Submit

Enroll a Beneficiary

Agents that select the option: **Complete and submit form myself**

- The electronic enrollment form will guide agents through a 5-step process of submitting the enrollment application.
- Fields marked with an asterisk are required and agents will not be able to proceed until marked.
- Beneficiaries will need to be present with their agent in order to sign the application at step 5.
- To complete the enrollment, agents will click **Submit** at the bottom of step 5.



Contact Info



Benefit Info



Other Info



Review & Submit

Enroll a Beneficiary

Agents that select the option: **Send to beneficiary to sign and submit**

- The electronic enrollment form will guide agents through a 4-step process.
- Fields marked with an asterisk are required and agents will not be able to proceed until marked.
- Agents will complete their portion of the enrollment and click **Send to beneficiary** at the bottom of step 4.
- An email or text will be sent to the beneficiary to review, sign, and submit the completed enrollment application. **Note:** The beneficiary will either receive two texts or two emails, one with the link and one with the authorization code.

Send enrollment [X]

How would the beneficiary like to receive the application to finish enrolling?

Email *** Email address**
test@test.org

Text *** Phone number**
(321) 555-1212

Cancel Send application

Enrollment History

There will be no email notification to the agent.

Agents will need to log back into the Medicare Enrollment Portal and check the beneficiary's profile for enrollment completion.

The Profile page allows agents to view a beneficiary's enrollment history.

Agents can access this page by:

- searching for a profile
- opening the profile
- then scrolling down to the **Enrollment history** section

The screenshot shows the 'Profile' page for a beneficiary named Jennifer Cole. The page is divided into several sections: Personal information, Home address, Sales information, Quote history, and Enrollment history. The 'Enrollment history' section is highlighted with a red box and shows a single enrollment for the 'Health First Rewards Plan' with a total monthly premium of \$0.00. The 'Quote history' section shows three quotes sent to jennifer.cole@hf.org on 04/13/2021. The 'Notes' section on the right contains several messages from the system regarding application and SOA status. The 'Tasks' section at the bottom right indicates no tasks for this profile.

Profile

Personal information

ZIP code: 32955 Brevard, FL

First name: Jennifer Last name: Cole Date of birth: 01/01/1950

Email address: jennifer.cole@hf.org Phone number: (321) 434-4446

Home address

Address 1: Address 2:

City: State:

Sales information

Is the sales contact different from the beneficiary? Yes No

Save

Quote history

Quote sent 04/13/2021 8:15 am PST to jennifer.cole@hf.org
Plan type: Please review this quote at your earliest convenience. Let me know if you have any questions. brokertest brokertest
Authorization code: FHIQSVGE

Quote sent 04/13/2021 8:00 am PST to jennifer.cole@hf.org
Plan type: Please review this quote at your earliest convenience. Let me know if you have any questions. brokertest brokertest
Authorization code: F5VCYLWY

Quote sent 04/13/2021 7:38 am PST to jennifer.cole@hf.org
Plan type: Please review this quote at your earliest convenience. Let me know if you have any questions. brokertest brokertest
Authorization code: QRMCEIKV

Enrollment history

Health First Rewards Plan
Submitted 04/20/2021 10:43 pm PST Confirmation #B95346484639919 View application

Total monthly premium \$0.00

Navigation: < Previous Add preferences > Continue to SOA Continue to plans

Enrollment History

Three types of enrollment status information may display under the **Enrollment history** section:

1. [Current year in-process](#) enrollments at the top of the list. These are applications that have been started but not completed for the current plan year and will offer a link to *Continue enrollment*.
2. [Current year completed](#) enrollments are listed below the in-process enrollments. These are completed enrollment applications for the current plan year and may include information about riders, documents uploaded during enrollment, and the ability to view the PDF of the application.
3. [Past enrollment](#) information is at the bottom. This may include plan name and other information.

Helpful Contacts

Broker Services

321.434.5265

HFBroker@HF.org

Commissions

Commissions@HF.org

For plan year 2021 and prior questions

HF-brokercommissions@plusoscar.com

For plan year 2022 and beyond questions

Customer Service

Broker Support

Local: 321.434.4945

Toll Free: 877.693.6489

HFHPInfo@HF.org

HF-brokers@plusoscar.com

Thank You!