AEP 2023

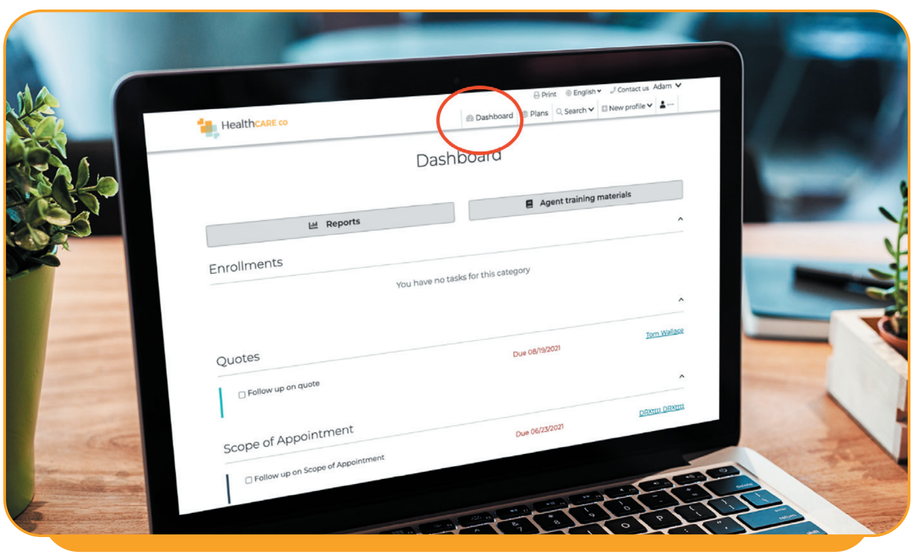
# Agent Dashboard and Reports

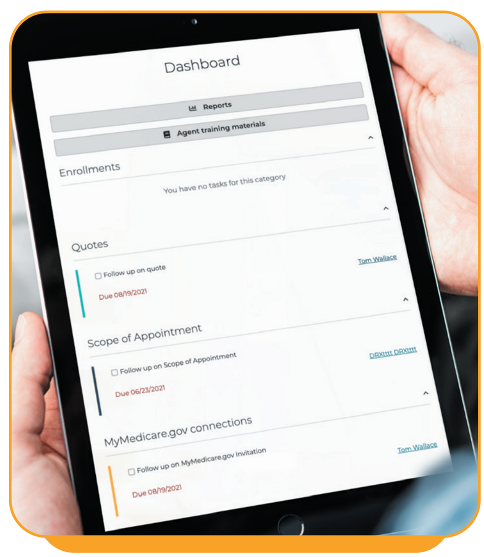
**The Agent Dashboard** empowers agents to manage their day-to-day work efficiently. Agents can view their open tasks, and access reports and training materials. While working with the beneficiary, agents are prompted to add follow up tasks after sending an SOA, MyMedicare.gov connection, quote or enrollment application. Tasks are displayed on the Dashboard by category and sorted by due date.

**Tasks include the following:**

- Enrollments
- Personalized Quotes
- Scope of Appointments
- MyMedicare.gov connections
- Other

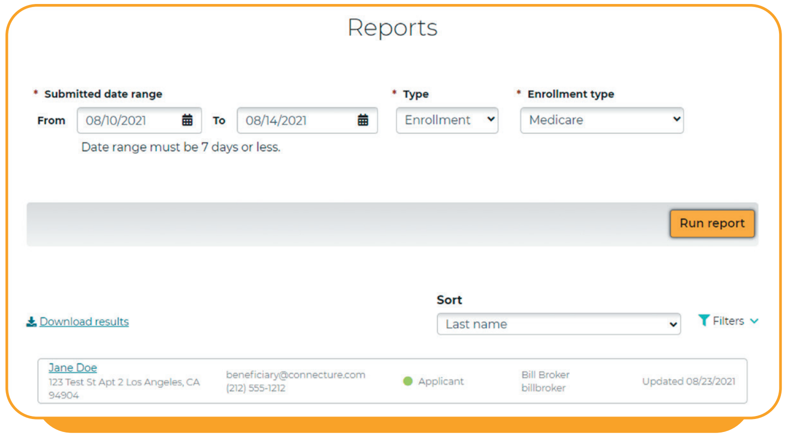
**For each task, agents can click the Profile name to open the beneficiary's profile and get to work quickly and easily. Once an enrollment is completed or the beneficiary completes their MyMedicare. gov invitation, the Dashboard cleans up tasks for the agent. Agents can complete their tasks from the Dashboard or Profile page.**

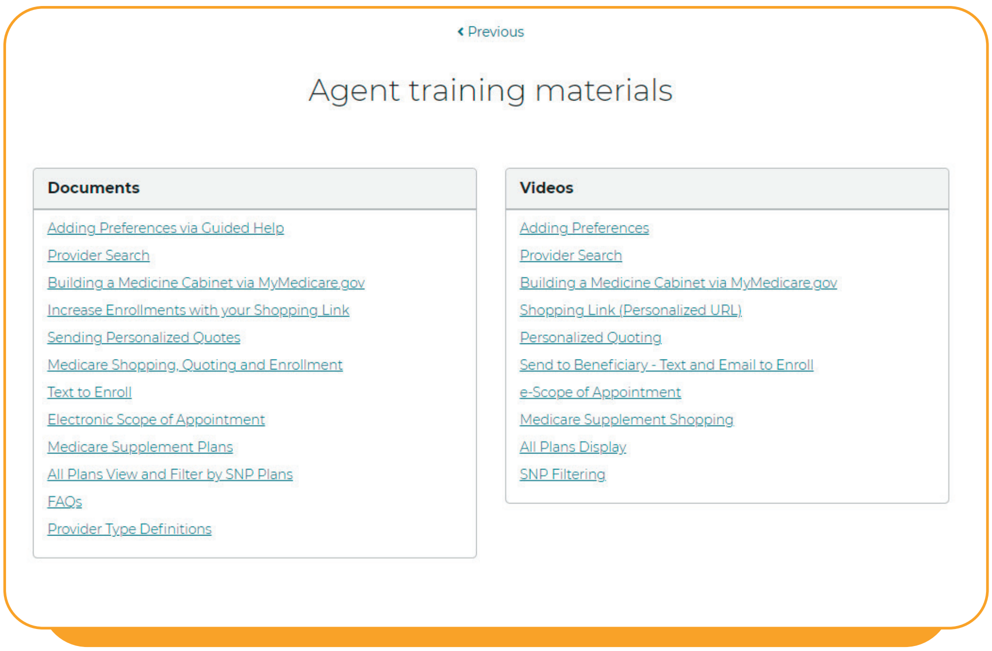



Access the Agent Dashboard from the top header.

Agents can run reports for beneficiary profiles with a completed application, HRA or Scope of Appointment (SOA).




Agent Training Materials can be accessed from the Dashboard.

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## Contact Us

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