PlanCompare ONE Professional - Agent FAQs

How can I effectively use the Shopping Link (my Personalized URL)?

Your Shopping Link is unique to you and ties you to every enrollment, so make sure your contact information is always up to date. Include it in your email signature or on social media to direct beneficiaries to self-serve on your agency's web site. NOTE: Use SOA and Quoting if you are in discussion with a beneficiary about Medicare products.

How can I find a beneficiary?

Use Search Beneficiaries by typing in a couple of letters. Search results will display contact info, status, agent of record and date profile was last updated. Fill in as much info as possible in a beneficiary profile as this will prepopulate in other areas, including the enrollment application. Search results may also be downloaded.

How can I stay compliant with the e-Scope of Appointment?

Send a link to complete a SOA via text or email. Beneficiaries will see your contact information and can easily fill in their portion and submit. You will receive confirmation that the SOA has been completed. NOTE: Add, upload and print PDFs of the SOA. Store them on the beneficiary profile to retrieve later.

What are Preferences, and why should I direct beneficiaries to use them?

From the Get Started page, beneficiaries can fill in their health status, age, prescriptions, pharmacy, providers, subsidy eligibility and other preferences. (Preferences are also referred to as Guided Help). Including preferences helps create a more personalized experience for the beneficiary and provides more accurate estimated costs to help each beneficiary find their best fit plan more readily.

Is there a Text to Enroll option?

Yes. Text or email beneficiaries to enroll in their best fit plans. Use text or email to complete an SOA also.

What is the Medicare.gov Connection?

Load prescriptions from claims data on the Medicare.gov website to automatically build a medicine cabinet. Agents receive notification when a beneficiary has approved access to Medicare.gov and prescriptions have been shared successfully. A beneficiary can revoke access at any time by contacting CMS.

When can I use Quoting?

Select up to 3 plans (MA, MAPD and PDP) to send to a beneficiary through this highly secure feature. NOTE: You can View All Plans but can only quote on those you are licensed to sell.

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When I send a personalized quote, will I know if the beneficiary enrolled and can I view their application?

You will receive an email confirmation once a beneficiary enrolls in a plan. You can view a PDF of the submitted application in the beneficiary's profile.

What does the beneficiary see when I send a personalized quote?

They can see your contact information, preferences you have added for them (health, subsidy, drugs, pharmacy), the plans you selected to include in the quote with the option to shop other plans you are licensed to sell.

Do links to personalized quotes expire?

They do not expire for each plan year, but the beneficiary will need to have their unique authorization code to view the quote.

Can I see PLANS without searching for or creating a profile?

Yes. There is a Plans button in the header that will allow you to enter a zip code to view plans in the service area.

Can I track tasks in the system?

You can always view tasks within a beneficiary's profile. Tasks also display on the **Agent Dashboard**. These are tasks created by the agent or as prompted as a follow up to an action item which may include sending a quote, a MyMedicare.gov invitation, an application sent via Email or Text to Enroll and an SOA sent.

How do I reset my password?

Select "forgot password" from the login page. You will be prompted to enter your username. An email will be sent to you to reset your password.

What can I do with Agent Reports?

Agents can run a report of their recently submitted Scope of Appointment, HRA and enrollment forms (by enrollment type: Medicare Advantage, Medicare Supplement and Ancillary). They can download the report as a .csv file. Admin users are also able to run the report for a specific agent.

What materials are available for agent training?

We provide materials on the individual features of the platform, along with training videos on the ConnectureDRX Youtube site. **Click here** to view the Agent Training AEP 2022 playlist.

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