✎ MedicareAPP

MedicareApp
PlanCompare ONE
Professional User's Guide

CONNECTURE DRX

PLAN YEAR 2021

ConnectureDRX Documentation

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About Connecture

ConnectureDRX offers the most widely adopted Digital Medicare shopping, quoting and enrollment solution, providing millions of consumers every year with a simple digital experience for finding their best fit plans. With gold standard drug pricing, ConnectureDRX arms consumers with reliable and time-tested out-of-pocket cost estimates to support better decision-making. ConnectureDRX's multi-channel automation saves consumers, carriers, brokers, and call centers time navigating Medicare complexities, improving member satisfaction and retention.

ConnectureDRX has been delivering compliant solutions for 20 years. Supporting 9 of the 10 top U.S. health insurance carriers, more than 50 national and regional FMOs, and with 4,600 plus plans on our platform, ConnectureDRX processed 800,000 Medicare and Medicare Supplement enrollment applications in the past year. Our regular consumer market surveys from more than 16,000 respondents affords unique insights on consumer shopping and enrollment behavior, driving innovation in research and development.

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Introduction

PlanCompare ONE for Professionals is the decision support solution that empowers Brokers and Call Center Agents (referred to collectively throughout this guide as 'Agents') to make personalized Medicare plan recommendations in which Medicare beneficiaries can electronically enroll. Agents can use PlanCompare ONE for Professionals to match beneficiaries with available plans based on individual preferences and provide them with estimated out-of-pocket costs.

After a beneficiary chooses a plan, PlanCompare ONE for Professionals can be used to assist the beneficiary with enrollment. Beneficiaries can also self-enroll based on a quote or application that has been sent to them by an agent or an agent's personalized shopping link.

> IMPORTANT: While this user guide explains how to use all the features of PlanCompare ONE for Professionals, each customer's rules, regulations, and site configurations may vary. Customers may use the portions of this guide that apply to their specific set-up to supplement their training materials and guides.

PlanCompare ONE for Professionals provides the following benefits in an omni-channel experience:

- A streamlined shopping workflow for viewing, comparing, and quoting plan options to beneficiaries

- Beneficiary profiles that securely save personal information and keep track of enrollment progress

- A consultation workflow that guides Agents through the process of collecting relevant information for creating personalized recommendations

- Electronic Scope of Appointment to capture required SOA documentation from a beneficiary electronically or to upload files, streamlining the process for agents

- Ability to add customer / carrier specific call center scripts to ensure call center agents are meeting CMS guidelines

- Drug and pharmacy finding tools that allow agents to assist beneficiaries with specific drug and pharmacy coverage questions independent of the shopping and quoting workflow

- Load profile data by manual input, preload file (see Member Eligibility) or through Salesforce integration (see additional documentation)

Altogether these tools enable Agents to recommend the plan that provides the greatest benefit to the beneficiary.

About this Guide

This guide describes the features available in PlanCompare ONE for Professionals.

This guide explains the standard workflows available based on the default configuration of the product. Depending on the configurations your site administrator has chosen for your specific site, the actual features you see may vary from what is depicted in this guide.

Audience

This user guide is intended primarily for licensed customers of PlanCompare ONE for Professionals to supplement your training and educational materials for administrators and agents to understand how to use the features of the product.

Login Page

On the login page, agents can log in to the PlanCompare ONE for Professionals site or reset a forgotten password.

Note: if the company uses Single Sign-On, agents will bypass this page.
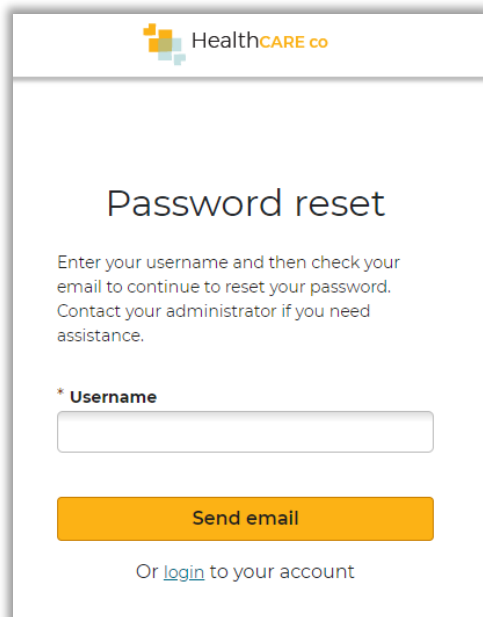
#	TASK	DETAILS
1	Log in	To enter PlanCompare ONE for Professionals, enter Username and Password, and click *Login*.
2	Forgot password	If agents forget their password, they can reset it by selecting *Forgot password*. This functionality requires that agents have an email on file in agent record in the website. This link opens the Reset Password page.

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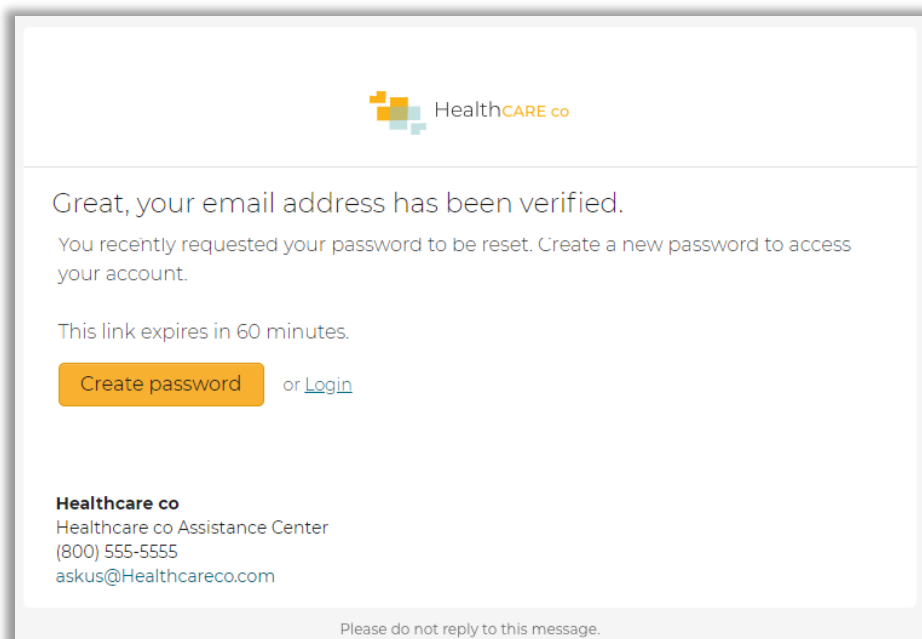
Forgot Password

Below are the steps for the Forgot Password process.

Step 1 – Enter Username

Step 2 – Check email

Step 3 – Reset password

#	TASK	DETAILS
Step 1	Send a password recovery email	Enter the Username for the account and select *Send email*. The system sends an email to the email account associated with the Username. **NOTE**: If an email address does not exist on the professional user's account information, this process should not be used. Contact your site administrator.
Step 2	Reset Password email	Open the Reset Password email and select the *Create password* button. This link will navigate the agent to PlanCompare ONE for Professionals to reset their password.
Step 3	Enter a new password	Enter the new password. It is recommended that passwords contain letters and at least one number. Password may not contain any of the following characters: & < > ' " % + Confirm new password by entering it again. The password entered in both fields must match. Click *Reset password* button. User will be notified if the password reset was successful. The new password is effective immediately. Select the *Login* button to log in with the new password.

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User Interface and Navigation

PlanCompare ONE for Professionals provides a clean, intuitive layout that allows agents to quickly and easily access the pages and functions needed to perform tasks.
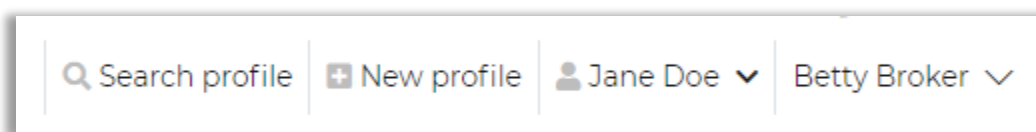
Global Header

Using the Global Header links, agents can *Search* for a profile or create a *New profile* from any page in the system and browse available plans.

- *Plans* (if enabled on the site) **–** Click this button to access the plan list page and search for plans available in a ZIP code if the beneficiary does not want to provide first and last name. This supports anonymous browsing of plans.

  - NOTE: If an enrollment is made from this path, the information is not saved to a profile and is not retrievable. Agents should always start the enrollment from a Profile to be able to save and retrieve information.

- *Search Profile* – Click this button to access the Search beneficiaries page, where agents can search for an existing beneficiary profile in the system. If a beneficiary profile exists, this is how agents can access the beneficiary's saved information, including any enrollments in progress.

- *New Profile* – Click this button to begin a new consultation for a beneficiary who does not have a profile. If the beneficiary is interested in shopping for a new plan, agents can calculate a personalized view of available plans and estimated out of pocket costs for each plan. They can compare plans, send a quote, and assist the beneficiary in completing enrollment.
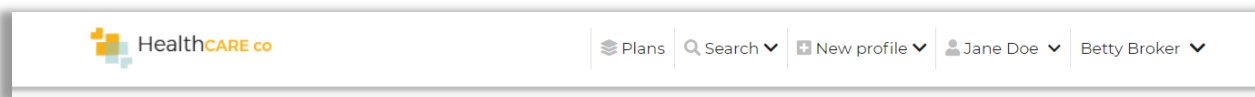
Agents will see "- - -" if there is no active Profile they are currently working with or they will see the beneficiary's name if they are working with a specific Profile.

Global header with no active profile

Global header with active profile displaying beneficiary's name

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Global header with Plans (browse anonymously) enabled

IMPORTANT: If users are already working with a beneficiary profile or are in the middle of another process when they click *Search profile* or *New profile*, any unsaved information is lost.

Agents can click on their name in the top right corner to access the Account Overview (covered in Agent Account Overview) and to log out.

If site language translation is turned on, the agent will see the dropdown for language selection in the global header. For PY2021, PlanCompare ONE for Professionals' Enrollment can be translated into Spanish. Translating the shopping experience is not currently supported.

Agent sees the global Contact Us link in the header to access the customer's contact information.

Global Footer

On the bottom of each page, the footer contains links that allow agents to view additional information and access additional pages. Links can be either internal or external. If external, the links will open in a new tab or window based on the user's browser settings.
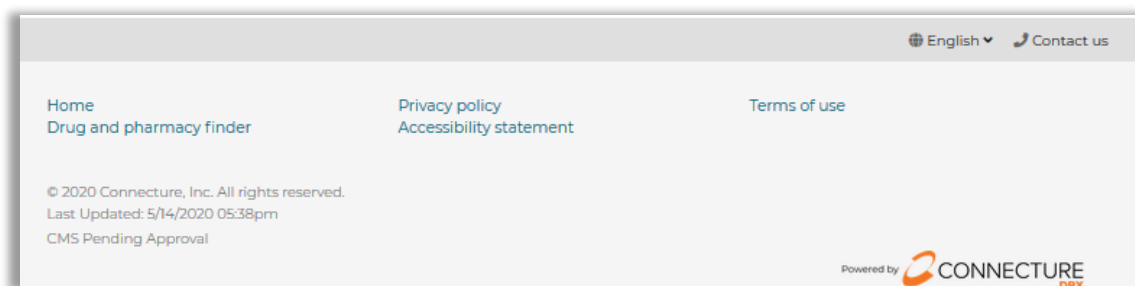
Footer

These links vary by site but may include the following:

- Home
- Drug and pharmacy finder
- Privacy policy
- Accessibility statement
- Terms of use

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Sub-header in Footer

This is the bar in the footer section which can contain links to switch languages or view contact information. The sub-header may include the following:

- Language
- Contact us

Call Center Scripts and Agent Instructional Information

Site administrators may add scripts or instructional text to appear on various pages throughout the system. These scripts contain prompts to guide call center agents or brokers through the process of working with a beneficiary on a specific page. Scripts can contain dynamic information about the profile the agent is working with.

For example, here is a script at the top of the prescriptions page that shows the dynamic beneficiary's last name (Doe) in the screenshot below:
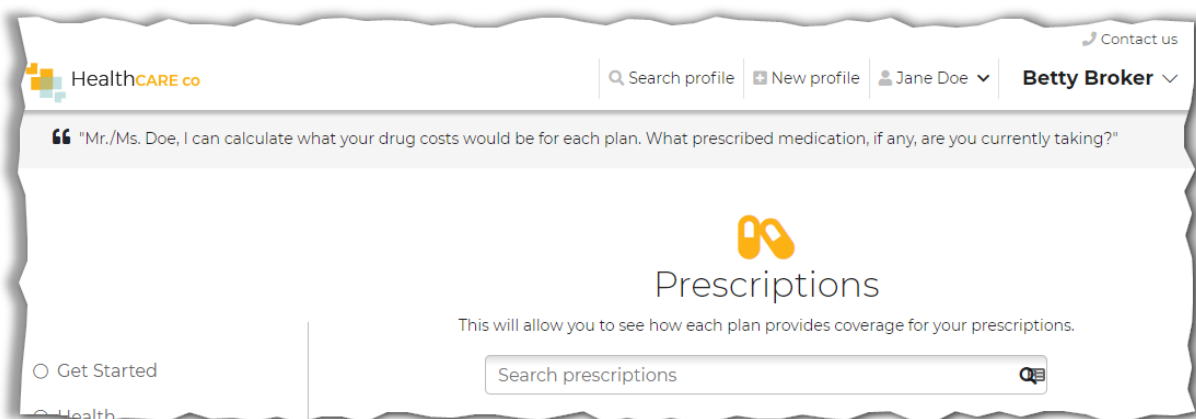
Beneficiary Profile

Search Profile

The Search beneficiaries page allows agents to search for an existing beneficiary's profile and view saved profile information, quoting history, and enrollments in progress or completed.

The Search beneficiaries page appears when agents first log in to PlanCompare ONE for Professionals. Agents can also access this page by clicking the *Search profile* link in the global header at the top of any page in the site.

#	TASK	DETAILS
1	Enter search criteria for a profile	To search for a specific beneficiary profile, enter the beneficiary's information in the search parameters. Agents need to enter information in at least one field; however, entering more information will assist in narrowing the search. **NOTE**: If searching by first name and/or last name, enter at least two characters.
2	Enter search criteria for applications	To narrow search results to include only the beneficiaries who started enrollment applications within a specific date range, enter start and end dates in the application search fields.
3	View search results	To find the beneficiary profiles that match the search parameters entered, click *Search*. The search results table displays the results: Profiles in Registrant status indicate a beneficiary who has not started an enrollment application. Profiles in Applicant status indicate a beneficiary who has either started or completed an enrollment application.
4	Access a beneficiary's profile	To access a beneficiary's profile, click the name of the beneficiary and the Edit Profile page opens.

New/Edit Profile

The Profile page allows agents to create a new profile to begin working with a new beneficiary. Agents can access profile information in the future by searching for the profile. Click *New profile* in the Global Header to access the page to create a new profile. Enter the required information and click *Save*.

> **NOTE:** Profiles can also be created using the Member Eligibility file or SAML SSO. Contact your Customer Success team with any questions.

#	TASK	DETAILS
1	Enter or edit beneficiary information	Agents can use the information fields to enter or edit the beneficiary's personal information. Required fields are marked with an asterisk *. Any information added here can be edited in the future. Click *Save* after entering information.
2	Work with the beneficiary	After creating a new profile or accessing an existing profile, agents can edit the beneficiary's information, shop for plans, add preferences information, send a Scope of Appointment or Quick Quote, or start enrollment. To proceed to the next step, click *Continue to plans, Continue to SOA,* or *Add Preferences* below the profile form.

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Dropdown Menu and Action Bar

While agents are working with a beneficiary profile, a menu is available in the header at the top of each page. Each menu option represents a page agents can navigate to. These pages allow agents to see or update information.
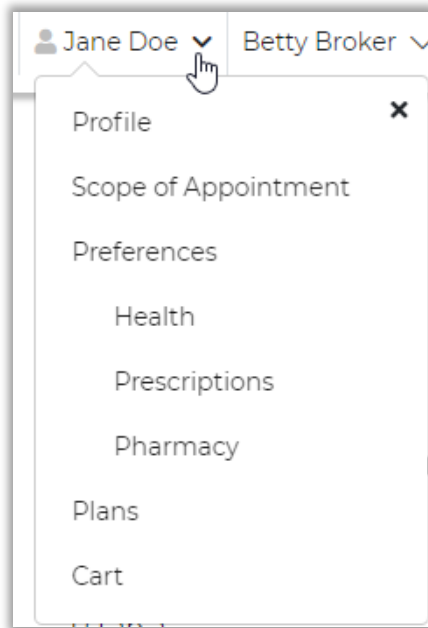
Agents can use the buttons at the bottom of pages to progress through the site in the recommended order. Navigate to any step and these actions will save information or prompt agents to save anything unsaved on the page.
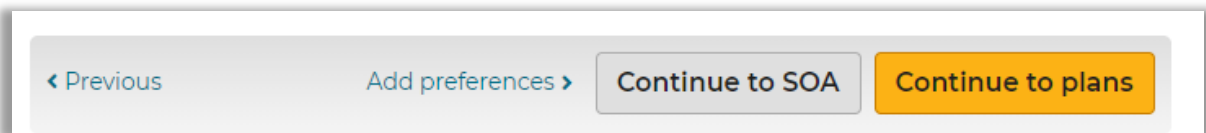
Notes and Tasks

While agents are working with a beneficiary profile, they may need to quickly record miscellaneous information or add tasks to remind themselves to do something. In PlanCompare ONE for Professionals users, two quick tools appear on the profile page:

Agents can quickly create notes and tasks for the active profile on the Profile page.

NOTES

Notes allow agents to track miscellaneous information about the beneficiary. 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.

Additionally, agents can manually add notes to keep track of information you gather as they work with a beneficiary.

System generated notes include:

- Sending an electronic Scope of Appointment

- Enrollment Application sent to beneficiary via email and/or text message

- Blue Button integration with MyMedicare.gov initiated and/or completed

TASKS

Tasks allow agents to set reminders to perform actions to assist the beneficiary. You can select a custom due date. The due date determines where the task appears on the task list. Once a task has been checked as completed, it cannot be unchecked again at this time.

For example, agents may want to add tasks for the following types of items:

- Check for a completed SOA from the beneficiary

- Email materials to the beneficiary

- Upload/view SOA's from your desktop

- Document a scheduled meeting date and location with a beneficiary
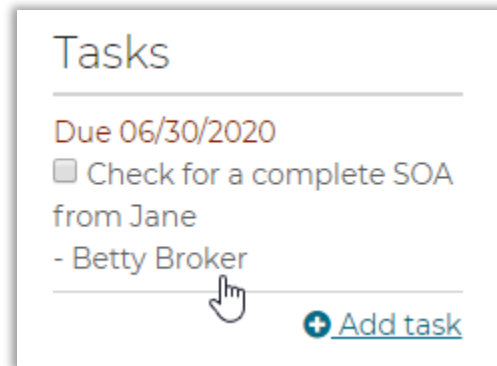
Scope of Appointment (SOA)

PlanCompare ONE for Professionals provides a Scope of Appointment page that allows agents to obtain and manage SOA information for an appointment in the system. This includes an electronic SOA form that agents can email and/or text to the beneficiary, as well as an agent portion of the form that agents can complete and submit in the system after the appointment.

While working with a beneficiary profile, agents can access this page by clicking the beneficiary name in the Global Header and selecting the *SOA* menu option or clicking *Continue to SOA* from the beneficiary's Profile page.

View Before Sending Beneficiary SOA Form

#	TASK	DETAILS
1	Scope of Appointment Section	This section will show all activity of SOAs sent to the beneficiary and list all SOA's that have been collected for a beneficiary. Users will be able to download a pdf copy of a completed SOA (both consumer and agent section completed).
2	Print Form and Upload Documents	Agents can print a blank SOA pdf form for the beneficiary to fill out. They may upload completed hard copy SOAs from files on their desktop. Users may view an uploaded SOA or other document by clicking the document name to download it in the original file type. Accepted file types include pdf, jpg, gif or png that are less than 5 MB each.
3	Email Electronic SOA Form	Start the process by emailing the SOA form to the beneficiary. If the beneficiary's email was previously populated in the profile, it will prepopulate by default. Emailing the SOA is the quickest method to obtain the SOA information as it allows agents to complete and submit the Agent portion of the form online as well.
4	Text SOA Form	Agents can also send the SOA form, the same link they send as an email, by text message.

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View After Agent Sends SOA Email to Beneficiary

After agents click *Email SOA* or *Text SOA* to send the form to the beneficiary, they will see a notification in the SOAs activity list that it was sent. A note is also automatically added to the Profile Notes section (see Notes and Tasks).

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

✔ Text sent to (555) 123-1234 on 07/30/2020

✔ Email sent to test@connecture.com on 07/30/2020

Sample Email Beneficiary Receives to Complete SOA Form

HealthCARE co

Hi Kelly,

I am looking forward to meeting with you...

Please fill out the Scope of Appointment online form. Be sure to select the Medicare health plan options that you are interested in discussing during our visit.

It's important that you complete the form prior to our visit since it is required by the Center for Medicare and Medical Services.

Complete "Scope of Appointment" form

Bob Broker

Bob Broker
bbroker@agency.com
(800)123-4567 | M - F 8am - 5am

Sample Text Beneficiary Receives to Complete SOA Form
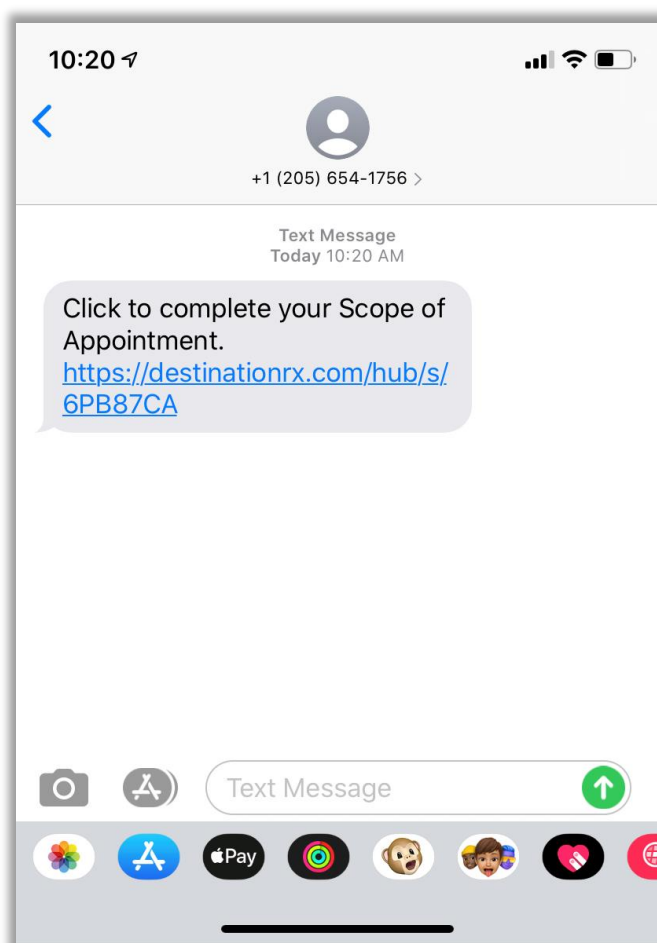
Sample Beneficiary SOA Form

This is a sample of the form the Beneficiary will see when they click the link in the email or the text message to complete the form. They see the agent information in the header, their options to choose from for the appointment to discuss and can submit the form.

Agent Email Notification – Beneficiary Completed SOA

Once the beneficiary completes and submits the SOA form, the agent who sent the SOA form will receive a notification email (if the agent has an email on file) that the beneficiary has completed their portion.
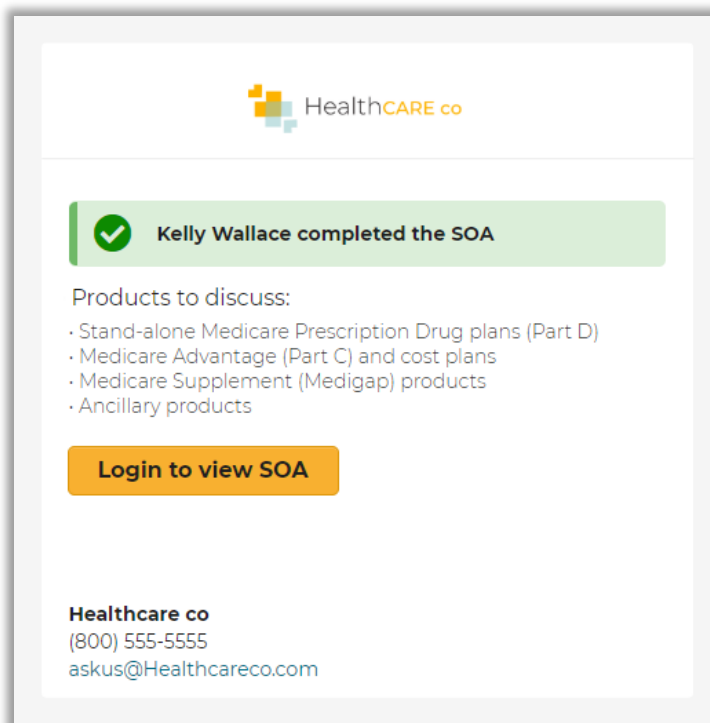
View After Receiving Beneficiary SOA Form

The agent will log in and navigate to the beneficiary's Scope of Appointment page. Here they see the completed form information and the option to Complete form. To open the form, click *Complete form*.

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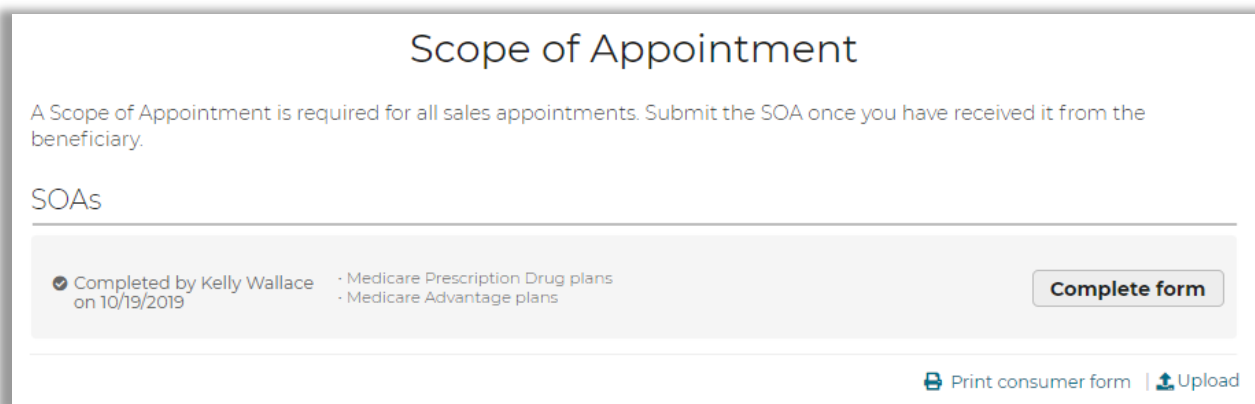
Agent Complete SOA Form

This is a sample of the Agent portion of the SOA form agents will see when you click on *Complete form*. After the meeting or consultation, agents can return to this page to complete the Agent portion of the SOA form. This form allows agents to enter information about the plans that they presented to the beneficiary during the meeting. Fill out the required information and click *Submit broker form*.

View After Submitting Agent SOA Form

#	TASK	DETAILS
1	View the plan types requested by the beneficiary	If agents use the email method to send the SOA form, after the beneficiary completes the form, this page is automatically updated with the requested plan types that the beneficiary entered. Agents can return to this page to review the plan types that the beneficiary wants to discuss.
2	View a list of submitted SOA forms	Agents can return to this page to view a list of submitted or uploaded SOA forms. Each SOA displays the plan types that the beneficiary expressed interest in. If agents need to view the submitted SOA, they can download by clicking *View*.

Agent Upload SOA Completed Outside of the System

Agents can click the *Upload* link on the SOA page and upload a document for an SOA completed outside of the system. Accepted file types include: .pdf, .jpg, .gif or .png that are less than 5 MB each.
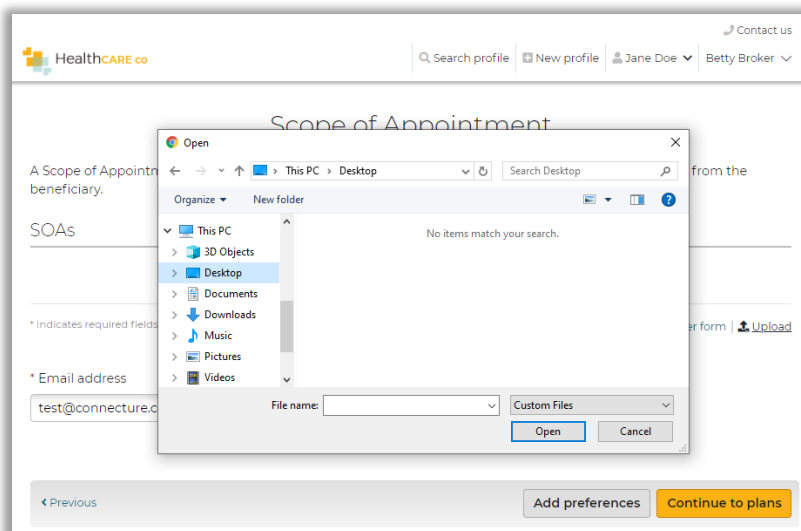
Add Preferences / Guided Help

In PlanCompare ONE for Professionals, agents can enter preferences information specific to the beneficiary to help select their best fit plan. Entering information in the guided help workflow will help generate accurate total estimated costs per plan for the beneficiary.

Agents can access the guided help workflow from:

1. The beneficiary dropdown menu in the global header and clicking *Preferences*

2. Any beneficiary profile page by clicking *Go to preferences* in the action bar at the bottom of the page.

3. The Plan List page for the beneficiary by clicking *Add preferences* button in the left sidebar above the filters.
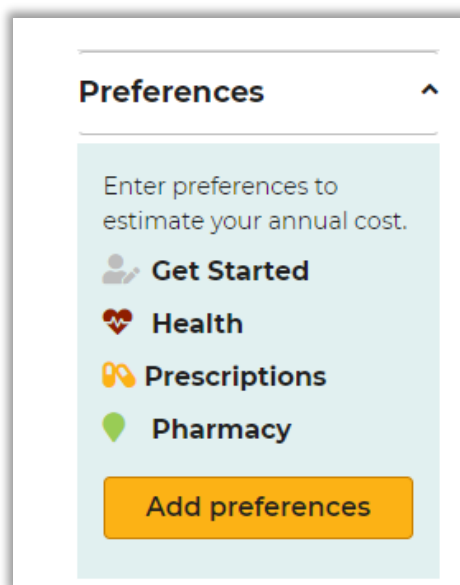
Get Started

On the Get Started page, agents can provide the beneficiary's zip code, select the interested coverage type and subsidy. This allows agents to indicate whether the beneficiary receives a Low-Income Subsidy. The Low-Income Subsidy, also known as "Extra Help," is available for eligible beneficiaries whose income and resources are limited. This subsidy aids with prescription drug plan costs, including the premium, deductible, and copayments. Qualifying for this subsidy impacts plan pricing. Providing the beneficiary's subsidy information allows the system to adjust premiums, drug deductible and drug copays in the plan cost estimates.

While working with a beneficiary profile, agents can access this page by selecting the *Preferences* in the dropdown menu or clicking *Go to preferences* in the Profile page action bar.

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#	TASK	DETAILS
1	Provide location information	Enter the beneficiary's zip code to determine available plans. This will prepopulate from the beneficiary's profile and updates made to the zip code here will save to the profile.
2	Select interested coverage type	Select which coverage type the beneficiary is interested in and what they are shopping for. The choice made here will control which plan type tab you land on when reaching the available plan list page. Agents will still be able to select other tabs to see other plan types on the available plan list page. The choice also impacts the dynamic workflow; for example, if the beneficiary is only interested in Prescription drug, then the workflow will skip the Health page. Agents can still choose to navigate to the Health page using the left bar navigation.
3	Select subsidy eligibility	Select an option to indicate the level of assistance the beneficiary qualifies for.
4	Continue to the next step	Information is automatically saved as soon as it is entered on the page. Click *Continue* to navigate to the next part of the preferences workflow or navigate using the menu on the left side of the page. Agents can also click *Previous* to go to the previous page they were on, *Skip* to skip this page (information is saved) or *Go to plans* to go directly to the plan list.

Health Information

Entering information about the beneficiary's location, age range, and health provides a list of available plans and calculate estimated out-of-pocket medical expenses. The age and health information agents provide does not affect the plan premium or the beneficiary's eligibility for Medicare plans.

The Health Information page allows agents to provide age range and health information for a beneficiary. While working with a beneficiary profile, agents can access this page by selecting the *Health* option in the dropdown menu or clicking *Go to preferences* in the Profile page action bar.

#	TASK	DETAILS
1	Provide health information	Answer the questions on this page to provide information about the beneficiary's age range and health.
2	Continue to the next step	Information is automatically saved as soon as it is entered on the page. Click *Continue* to navigate to the next part of the preferences workflow or navigate using the menu on the left side of the page. Agents can also click *Previous* to go to the previous page they were on, *Skip* to skip this page (information is saved) or *Go to plans* to go directly to the plan list.

Prescriptions

The Prescriptions page allows agents to enter the beneficiary's prescription drugs. If the beneficiary is not interested in plans with drug coverage or does not want to provide their prescription drugs at this time, agents can select a different page or skip to the next step. It is recommended that the beneficiary provide prescription drug information, as this allows agents and the beneficiary to understand if and how their drugs are covered by each plan and to provide a better out of pocket cost estimate.

While working with a beneficiary profile, agents can access this page by selecting the *Prescriptions* option in the dropdown menu or clicking *Go to preferences* in the Profile page action bar.
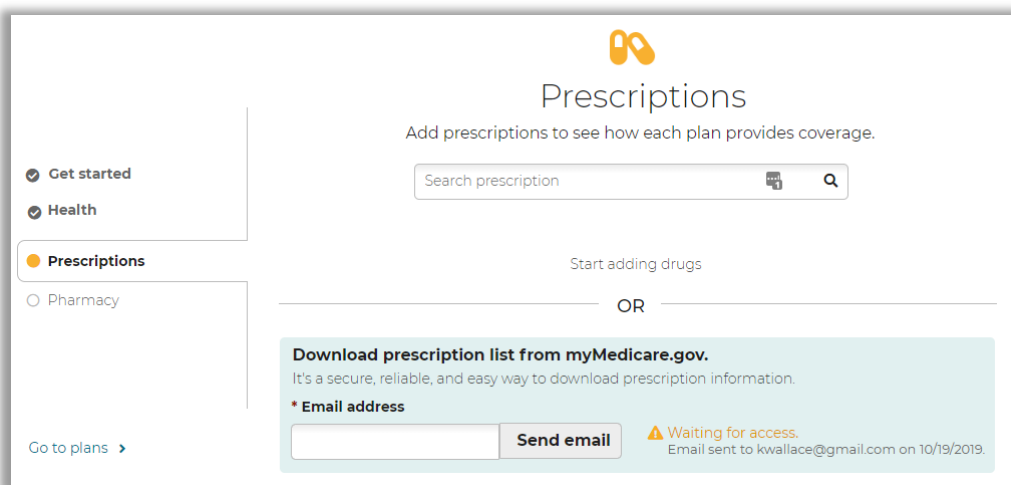
#	TASK	DETAILS
1	Find a drug	To find a drug, enter the first few letters in the search field. Use the drop-down search results list to select the drug.
2	Add a drug	After finding and selecting a drug, additional fields appear, where agents can enter dosage, form, frequency, and quantity information. The most common values will be selected by default. When finished, click *Add*. The drug is added to the Medicine Cabinet and saved to the Profile.
3	Choose Direct Generic	Switch to the direct generic form of the drug by clicking the button provided.
4	Manage the Drug List	To edit the drugs that are on the Medicine Cabinet, agents can change the following: - Change the drug dosage by clicking Edit - Remove the drug by clicking the X.
5	Continue to the next step	Information is automatically saved as soon as it is entered on the page. Click *Continue* to navigate to the next part of the preferences workflow or navigate using the menu on the left side of the page. Agents can also click *Previous* to go to the previous page they were on, *Skip* to skip this page (information is saved) or *Go to plans* to go directly to the plan list.

Medicare Blue Button

Beneficiaries can connect their PlanCompare ONE profile with their MyMedicare.gov account to import their claims data and pre-populate drug information into their list of drugs. Agents can initiate this process by sending an email to the beneficiary from the Prescriptions page.

Agent Send Beneficiary Email to Connect
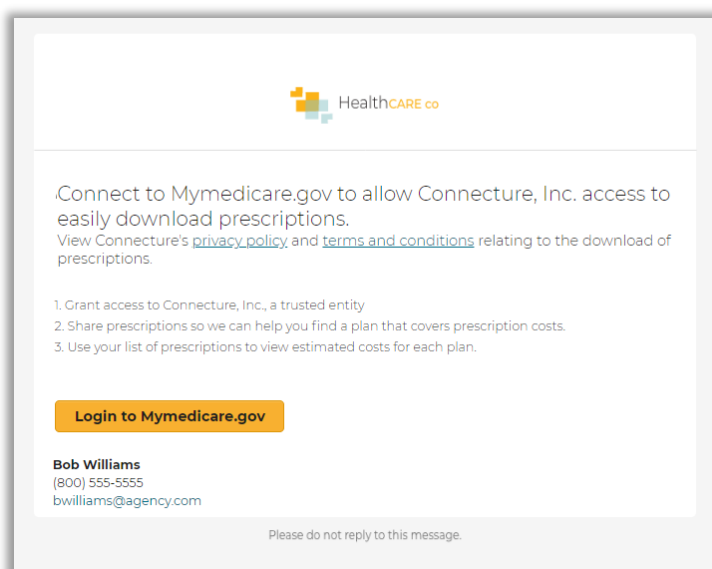
Agents can send an email to the beneficiary to connect their PlanCompare ONE profile with CMS claims data to import their prescription information instead of having to manually enter. Agents can still manually enter drugs in addition to the imported claims data. Enter the email address (this will pre-populate if available) and click *Send email*. Agent will then see the status "Waiting for access" until beneficiary grants access.

Sample Email Beneficiary Receives to Connect Blue Button

Beneficiaries click the link in the email to start the process. The link brings them to MyMedicare.gov where they create an account or login.

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Sample Login and Grant Access Pages Beneficiary sees on CMS MyMedicare.gov

Beneficiary must create an account or login on MyMedicare.gov.

After logging in, beneficiary must Allow access. This is a sample page and may not reflect exactly what the beneficiary will see once they log in to MyMedicare.gov. They will see an Allow or Deny option and must select Allow to complete the process.

Agent Statuses

The agent will see a status update on the Prescriptions page so they can tell what the beneficiary has done with the email link:

> **Download prescription list from myMedicare.gov.**
> It's a secure, reliable, and easy way to download prescription information.
>
> * **Email address**
>
> [   ]   **Send email**   ⚠ Waiting for access.
> Email sent to kwallace@gmail.com on 10/19/2019.

- Waiting for access
  - Waiting for the beneficiary to click *Allow* or *Deny* on the CMS page. If a lot of time has passed, Agent should follow up with beneficiary to see if they received the email or not. They can resend the email.

- Issue loading prescriptions. Please try again.
  - If beneficiary has an issue connecting, the agent will see this status. Agent should resend the email and encourage beneficiary to try again.

- Beneficiary denied access
  - If beneficiary clicked *Deny* on the CMS access page, the agent will see this status. Agent can resend the email and encourage beneficiary to try again.

- Prescriptions shared successfully
  - If beneficiary clicked *Allow* on the CMS access page, the agent will see this status and see the list of prescriptions updated.

Sample Prescriptions Shared Successfully Page

After sharing prescriptions claims data successfully, the beneficiary sees a confirmation page with the drugs added to their medicine cabinet.
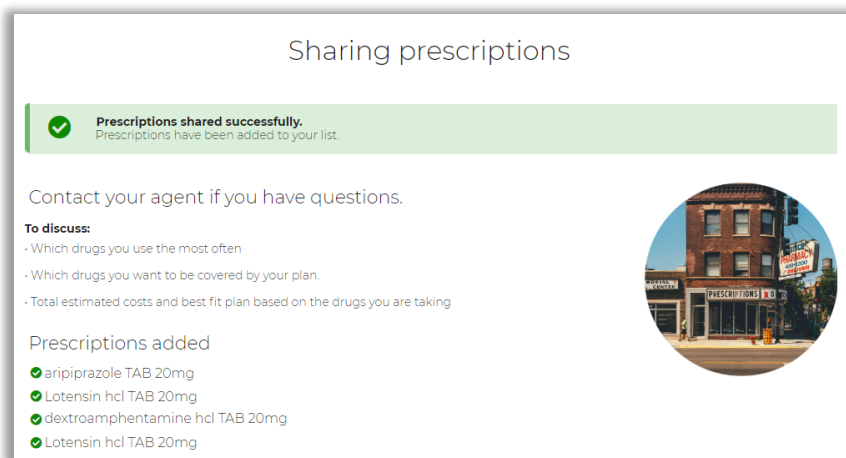
Email to Agent: Prescriptions Shared Successfully

After the beneficiary shares prescriptions claims data successfully, agents will receive an email (if there is an email on file for the account). Agents can log in and view the beneficiary's Prescription page and see all prescriptions added to their medicine cabinet.
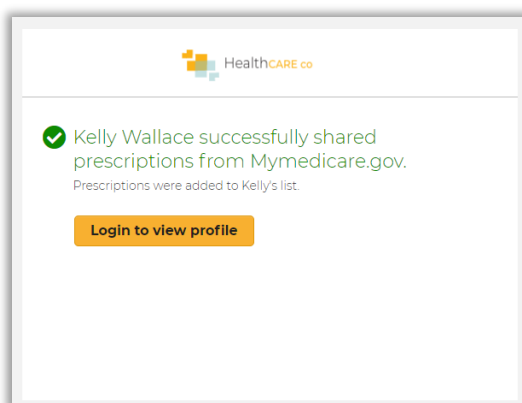
Import Latest Prescriptions

After beneficiary successfully shares their prescriptions claims data, the agent can Import latest prescriptions by clicking the *Import Latest Prescriptions* button on Prescriptions page.
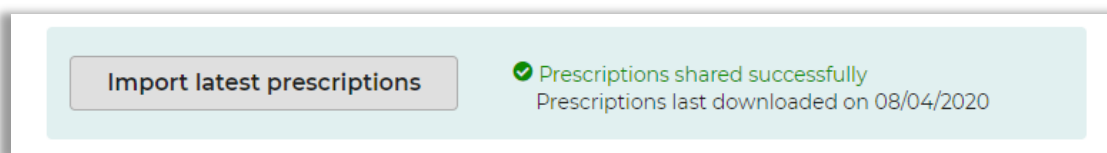
Pharmacy

The Pharmacy page allows agents to enter the pharmacy where the beneficiary fills prescriptions, so the system can provide more accurate drug pricing. Entering a pharmacy is optional, and agents can skip this page.

While working with a beneficiary profile, agents can access this page by selecting the *Pharmacy* option in the dropdown menu or clicking *Go to preferences* in the Profile page action bar.

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#	TASK	DETAILS
1	Select pharmacy area	If the agent entered a ZIP code on Get Started page or when creating the profile, a list of pharmacies for that ZIP appears. If the agent did not enter a ZIP or wants to search for a pharmacy in a different area, enter a ZIP code. Zoom in or out on the map and click to drag the map area.
2	Select a pharmacy	The pharmacies are listed in proximity order to the location entered. To select the beneficiary's pharmacy, click the *Add Pharmacy* button in the list or by clicking on a pin on the map and selecting *Add Pharmacy* there. The selected pharmacy icon changes color and now says "Pharmacy added" to indicate it is selected. The select pharmacy details display above the map. It can be removed by clicking the X.
3	Selected pharmacy	The selected pharmacy displays at the top of the page. The list also shows "Pharmacy added" for the selected pharmacy.
4	e-prescribing	Any pharmacies with the e-prescribing icon support e-prescribing.
5	Continue to the next step	Information is automatically saved as soon as it is entered on the page. Click *Continue* to navigate to the next part of the preferences workflow or navigate using the menu on the left side of the page. Agents can also click *Previous* to go to the previous page they were on or *Go to plans* to go directly to the plan list.

Shopping

Plan List

The Plan List 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.

While working with a beneficiary profile, agents can access this page by:

- Selecting the Plans option from the header beneficiary drop down menu
- Clicking *Continue to plans* from the Profile page
- Clicking *Continue* from the Add Pharmacy page
- If enabled, clicking *Plans* in the global header to browse anonymously

30 plans available in 90210 ✎

(1)

Medicare Advantage Prescription Drug Plans	Medicare Advantage Plans	Prescription Drug Plans	Medicare Supplement Plans
7 plans	5 plans	2 plans	16 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.

(3) Sort:
Total Estimated Annual Cost

(2)

Preferences **(9)** ^

(4) ☐ Add to compare

flexcare flexcare MAPD plan 6 2021
Not available Star rating

Medical Deductible	Maximum Annual Out Of Pocket	Monthly premium
$0	$4,900	$20.00

👤 **Get Started** Edit
Extra help: I receive help from Medicaid

(5) Plan Details   **(7)** Add to cart

❤️ **Health** Edit
• Generally healthy
• 65-69

Add-on coverage 🦷 👓 👂   **(6)** Add to quote

💊 **Prescriptions** Edit
Crestor TAB 10MG
Vyvanse CAP 70MG

💊 Prescriptions | 📍 Pharmacy | $ Est. drug cost | Total est. annual cost
2 of 2 covered | 1 of 1 covered | $220.80 | **$1,490.00**

📍 **Pharmacy** Edit
Rite Aid Pharm...

flexcare flexcare MAPD plan 3
★★☆☆☆ Star rating
🔻 Low performing plan

☐ Add to compare

Medical Deductible	Maximum Annual Out Of Pocket	Monthly premium
$0	$3,400	$33.00

Filters **(8)**

Clear all

Plan subtypes
☐ HMO
☐ PPO

Plan Details   Add to cart

Add-on coverage 🦷 👓 👂

Add to quote

(10) 💊 Prescriptions | 📍 Pharmacy | $ Est. drug cost | Total est. annual cost
2 of 2 covered | 1 of 1 covered | $220.80 | **$1,646.00**

PlanCompare ONE Professional

#	TASK	DETAILS
1	Select a plan type	A tab appears for each available plan type. The available plan types vary based on the plans included in the customer's website and the plans that agents are licensed to sell. If a tab is unavailable, it is because no plans of that type are available in this website and in the beneficiary's area. The following default tabs may appear: • Medicare Advantage Prescription Drug Plans • Prescription Drug Plans • Medicare Advantage Plans • Medicare Supplement Plans – see "Medicare Supplement Additional Information Window" on the next page To view the plans available for a plan type, select a tab.
2	Review plans	Review the available plans. Plans appear in order based on Total Estimated Costs, with the least expensive plan listed first. For each plan, agents can view plan details and enroll in a plan (if their permissions allow).
3	Sort plans	Agents can use this drop-down menu to sort plans according to the following: • Plan Premium (default for Medical Supplement) • Total Estimated Costs (default for Medicare) • Medicare Star Rating • Plan Name
4	Compare plans	Agents can compare up to 3 plans side by side. Check the *Add to compare* box next to the plans to compare. Click *Compare now*. The plan comparison page will open. Note: in a mobile device, users can only compare 2 plans side by side.
5	View plan details	To view additional plan information, click *Plan Details*. See *Plan Details* section for more information.
6	Send a quote	To send the beneficiary a quote for a plan, click *Add to quote*. See Quoting section in this document for more information.
7	Enroll in a plan	To select a plan and begin enrollment, click *Add to Cart* or *Enroll*. Agents can send beneficiaries applications by email, see Enroll a Beneficiary section in this document for more information.
8	Filter plans	Agents can use the filters to filter plans accordingly to carrier and plan subtype. Filters are data driven and are only shown if there is a plan available for that filter on the plan tab. Filter selections do not carry across tabs.
9	Preferences	Agents can see the preferences information entered for the Profile and easily navigate back to each page to edit or add information.
10	Covered preferences	Agents can see for each plan if the prescriptions and pharmacy are covered, as well as the estimated drug cost, total est. annual cost and health cost (depending on the plan type).

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Plans Link (Browse Anonymously)

It is strongly recommended to create a profile whenever working with a beneficiary so that information is saved, and the profile can be retrieved later. However, if a beneficiary does not want to give their name for a profile to be created, if this feature is enabled on the site then agents can search available plans before creating a profile.

#	TASK	DETAILS
1	Click Plans Link in Header	Agents can click the *Plans* Link from the header of any page to browse available plans for a coverage area. This will clear information and start a new session (see the three dashes indicating no profile is currently active).
2	Enter ZIP Code	Beneficiary must provide their ZIP Code to see plans available for the service area.
3	Shop for plans	Clicking *Shop for plans* will load the Plan List page as explained above in this document. Agents can enter preferences information and see all details about a plan. **NOTE:** If is NOT recommended to send a Quote or Application from this page without a Profile active because Agents will not be able to retrieve the information later. To send a Quote or Application, create a Profile and then proceed.

Plan Details

The Plan Details view allows agents to view the details for a specific plan. Agents can access this view from the Plan List page or from the Compare Plans view by clicking the *Plan Details* button.

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#	TASK	DETAILS
1	Review plan details	The Plan Details view allows you to view plan details, including costs, coverage, and any relevant plan documents.
2	View monthly drug estimates	If the beneficiary is interested in further details on drug pricing for plans with Drug Coverage, click *Prescriptions*. This option is available only for plans with drug coverage.
3	View monthly total costs	If the beneficiary is interested in viewing total estimated out-of-pocket expenses, click *Total Costs*.
4	Send a quote	To send a quote for this plan, click *Send Quote*. A window opens, where you can provide the beneficiary's email address.
5	Enroll in the plan	To enroll in the plan, click *Add to cart*
6	Plan documents	All documents associated with the selected plan are listed in this section. Click on the link to open that document in a new window.
7	Provider directory	This link will be enabled if an external URL is included in the plan data to perform a search for providers for the plan.
8	Edit the drug list	The Plan Details view includes information on which of the beneficiary's drugs are covered by the plan, and which drugs are not covered. If you need to edit the drugs selected for the beneficiary, click the *Add/edit prescriptions* link.
9	Prescription directory	This link will open the Prescriptions tab where a search may be performed for covered prescriptions specific to the plan.
10	Edit selected Pharmacy	The plan details view includes information on pharmacy coverage. If you need to edit the selected Pharmacy, click the *Add/edit pharmacy* link.
11	Pharmacy directory	This link will open the Pharmacy tab where a search may be performed for covered pharmacies specific to the plan.

Prescriptions tab

The Prescriptions tab allows agents to review estimated drug costs and restrictions for a plan. Agents can access this page from the Plan Details view by clicking Prescriptions at the top of the screen.

#	TASK	DETAILS
1	Change the selected drugs	If necessary, agents can make changes to the drugs selected by clicking *Add/edit prescription list*.
2	Switch between retail and mail order pricing	Drug retail pricing appears by default. If the beneficiary orders drugs through the mail, agents can view mail order pricing by clicking the *Switch to Mail Order Costs*.
3	Review the selected drugs	This page details the prescriptions drugs that were entered for the beneficiary on the Prescriptions page. This includes drug pricing by phase and any restrictions.

#	TASK	DETAILS
4	Footnotes	A footnote number is displayed next to each drug name for which the footnote is applicable with a detailed description at the bottom of the page. Footnotes dependent on the plan's formulary and pharmacy type are displayed at the bottom of the page.
5	Enroll in the plan	To enroll in the plan, click *Add to cart*.

Total Costs tab

The Total Estimated Costs page allows agents to review the beneficiary's estimated out-of-pocket costs for a plan. Agents can access this page from the Plan Details view by clicking *Total Costs* at the top of the screen.

#	TASK	DETAILS
1	Review your total estimated costs by month	The table on this page allows agents to answer any of the beneficiary's questions about how total estimated costs are calculated for this plan. Each month can be expanded to see the Premium, Drug cost per prescription and health cost expected.
2	Switch between retail and mail order pricing	Drug retail pricing appears by default. If the beneficiary orders drugs through the mail, agents can view mail order pricing by clicking the *Switch to Mail Order Costs*.
3	Review estimated drug costs and restrictions	Review the beneficiary's estimated drug costs per month under the selected plan. These amounts are calculated based on the plan's coverage.
4	Enroll in the plan	To enroll in the plan, click *Add to cart*.

Compare Plans

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

#	TASK	DETAILS
1	Compare plans	The Compare Plans view displays common benefits that agents can compare at a high level across plans. Use the information on this page to compare plans in terms of Costs, Coverage Overview, and Benefits. Use this page to answer many of the beneficiary's questions about the benefits of one plan versus another.
2	Plan Highlights	Highlights rows when at least one of the plans being compared has a different benefit value.
3	View plan details	If the beneficiary has a question that is not covered on the high-level details provided by the Plan Comparison view, the Plan Details button allows agents to see additional details for a plan.
4	Send a quote	To begin the Quick Quote process for all plans on this page, click *Send Quote*.
5	Enroll in a plan	While agents are on the Compare Plans view, the beneficiary may decide which plan to enroll in. If the company allows online enrollments, agents can begin enrollment by clicking *Add to cart* and using the company's guidelines to complete the online enrollment form.

Riders

Riders, also referred to as Add-on coverage, are additional benefits that may be purchased with the selected plan, if offered. The plan cards provide a visual reference to indicate if riders are available for a plan. The benefit details of what a rider covers may be found in plan details, plan compare, and the shopping cart. Riders may only be selected for purchase in the shopping cart.

Plan Card

Plan Details

PlanCompare ONE Professional

Shopping Cart

#	TASK	DETAILS
1	Rider names	Riders names within each category.
2	View/Hide details	These links will appear if details exist for the rider.
3	Add/Replace buttons	Add the selected rider to the cart. Only one rider for a given type may be added to the cart. For example, if a dental rider is selected and a combined rider also offers dental coverage, the button on the combined rider will have the text *Replace*. If *Replace* is selected, the dental rider previously selected will be deselected automatically.

Send a Quote

Quotes are an effective way to deliver plan information and ability to enroll to a beneficiary electronically by sending the quote in an email. The email provides system-generated links that allow beneficiaries to access the consumer PlanCompare ONE website and complete their own enrollments online. The links provided in the email contain the Agent ID, which ensures agents get credit for any enrollments that result from the Quote.

Agents can send a quote for up to 3 plans at a time (plans must be the same plan type).

- If a beneficiary has a profile in the system, agents can send a Quote while shopping for plans through the beneficiary's active profile.

- Add plans to quote - Agents can select up to 3 plans that they want to be included in the quote from the Plans page. A multi-plan quote can include plans of the same plan type i.e. agents cannot send a MA and PDP plan in the same quote

- Send quote – Agents can send a quote to a beneficiary by clicking the *Send Quote* button from the following pages:

- - o Plan List
    - o Plan Details
    - o Compare plans
- Clicking on *Send quote* opens a modal that displays:
    - o Email of the beneficiary
    - o Custom message
    - o Plans included in quote
    - o Documents to be sent with quote. Because this feature sends the links to be included with the quote to the beneficiary, it is only available for single plan quotes as to not confuse the beneficiary regarding which documents go with which plans. When the beneficiary comes to the site to look at plans, they can see all available documents online.
- Agents will see a confirmation message when the quote is sent and see the quote history on the beneficiary's profile.

Send Quote from Plan List

PlanCompare ONE Professional

Send Quote from Plan Details

Send Quote from Compare Plans

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Send Quote Window

Quote Sent Confirmation

#	TASK	DETAILS
1	Add plans to quote	Select up to 3 plans to add to the quote from the plan list page
2	See plans included in quote	Agents can see the plans selected for the quote, up to 3 plans of the same plan type per quote.

#	TASK	DETAILS
3	Remove a plan from quote	Agents can remove a plan from the quote before sending by clicking the X next to the plan.
4	Send Quote button on Plan list, details and compare pages	Click *Send quote* to open the quote modal.
5	Email address	Enter the email address for the beneficiary receiving the quote. The email address on the profile will pre-fill if there is one available.
6	Customize your message	Agents can customize the message, which the beneficiaries will see when they authenticate into the site to view the quote.
7	Plan documents	For individual plan quotes, choose which plan documents to include in the quote.
8	Send email	Click *Send email* to send to the beneficiary. After sending, agents see a confirmation with the authorization code the beneficiary also receives in the email which is needed to access the quote.

Sample Beneficiary Quote Emails

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 and a separate email with the access code email. These are separate for security reasons because PHI/PII is involved.

The first email has a link to view the quote, along with the name of plans included in the quote and links to any selected when sending the quote:

PlanCompare ONE Professional
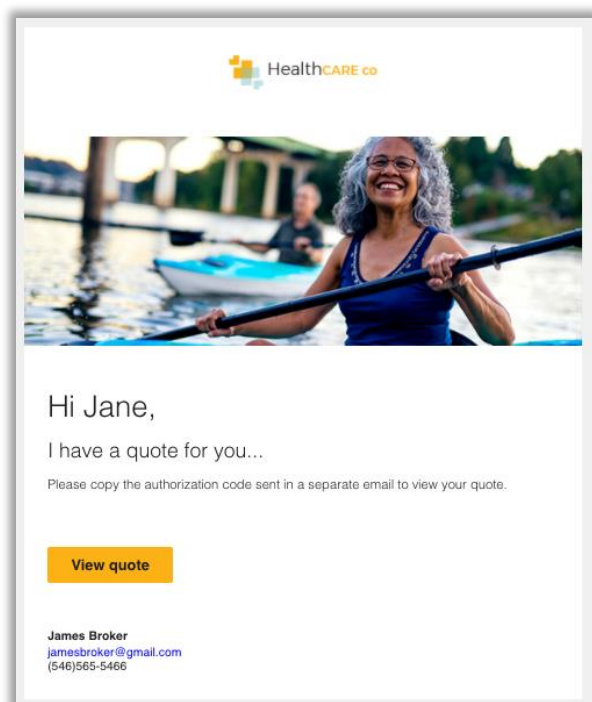
The second email contains a unique system generated authorization code which will be used to authenticate the beneficiary to view the quote:
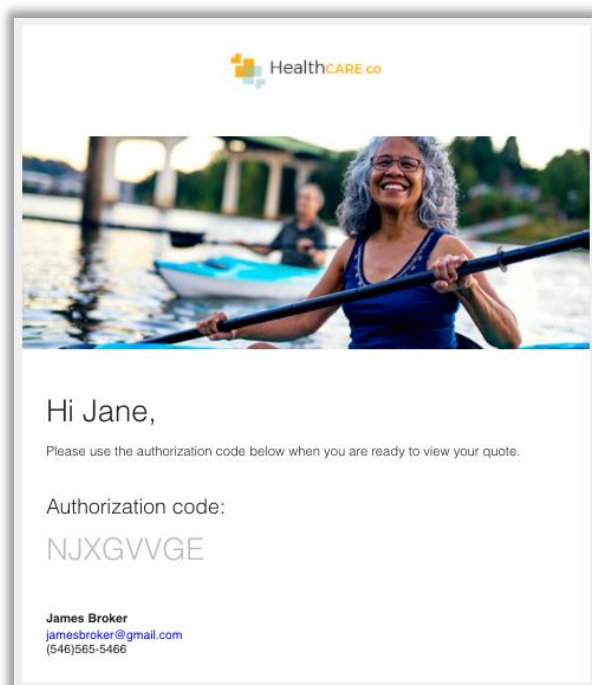
Beneficiary Quote Authorization

The beneficiary will click on the *View quote* link from the first email to land on the authorization page. Here they can see the broker information in the global header.

CONNECTURE
DRX

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#	TASK	DETAILS
1	Authorization code	Beneficiary enters the unique authorization code sent to them with the quote emails.
2	Disclaimer	Beneficiary must check and agree to disclaimer if displayed. Click *View details* for more information on the disclaimers.
3	View quote	Beneficiary clicks on *View quote* button to authenticate and view plans sent in quote.

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Beneficiary Quote Summary

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

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#	TASK	DETAILS
1	Personalized welcome message	Personalized message agent sent to the beneficiary when sending the quote.
2	Review your information	Authenticated beneficiaries can see their personal information including name, zip, and email.
3	Add your preferences	Beneficiary can view/add/edit their preferences like health status, prescription drugs, and pharmacy.
4	Pick a plan	Plans sent in quote are listed here. Beneficiary can view plan benefits, plan details, or add plan to cart and enroll.
5	Shop all available plans	Clicking *Shop all available plans* navigates beneficiary to the plan list page where they can view and shop for all available plans in their service area.
6	Shop all coverage types	Beneficiary can navigate to plan list page of a particular plan type for additional shopping.

Quote History

Quotes sent to the member are added to the quote history section in the beneficiary profile.

#	TASK	DETAILS
1	Date	Quote sent date in PST
2	Agent details	Username and name of agent who sent the quote
3	Authorization Code	Unique system generated authorization code for that quote
4	Custom message	Customized message included with the quote

Show Plans Agents Have Permission to Sell

Overview

This feature allows agents to view all plans available in a beneficiary's service area as if they were on the Medicare.gov site without having to leave the site. This feature will assist agents/brokers in guiding beneficiaries to best plan based on their situation.

Plan List Page

When this feature is enabled on the site, all plans will be returned based on plans the agent has permission to sell, plans they don't have permission to sell and plans contained in the Public Use File (PUF). The plans are available in the list to view plan details or compare against other plans. Non-permissioned plans and PUF plans are not available to be added to the cart and users may not enroll in them. Users may also not add these plans to a quote.

#	TASK	DETAILS
1	Not licensed to sell/quote	This area indicates to the user that they are not licensed to sell or quote this plan. These plans are available for the Compare feature.
2	Licensing Filter	Due to the high volume of plans that could be returned, users have the option to filter out non-permissioned/PUF plans by clicking the checkmark in this filter. This will only return plans the agent has permission to sell.

Plan Details

When benefits are available for non-permissioned/PUF plans, they will be displayed on the Plan Details page. Note: When the user has entered a pharmacy in Guided Help, the pharmacy will not display on non-permissioned/PUF plans. This applies to both retail and mail order costs.
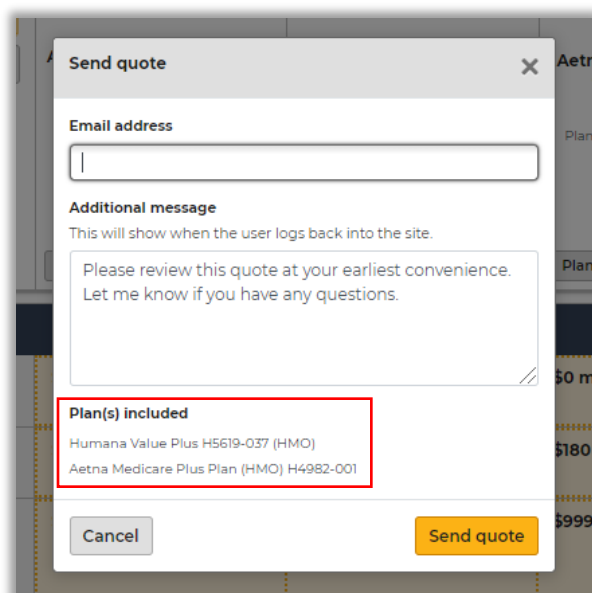

Compare Plans

As stated above, plans an agent has permission to sell, as well as non-permissioned/PUF plans, are available for a side-by-side comparison. Only plans that an agent is licensed to sell will be allowed to be added to the cart/enroll or added to a quote.

After clicking the *Send quote* button, note the plan in which the agent is not licensed to sell is not included in the quote.

Enroll a Beneficiary

Agent Complete Enrollment Application for Beneficiary

PlanCompare ONE for Professional's electronic enrollment form guides the agent through the process of submitting the enrollment application. From the plan list page, an agent can add a plan to the cart. Agents can also start an enrollment from any page within a specific plan by clicking *Add to cart*. This directs the agent to the cart and *Continue to apply* from the cart takes the agent to the enrollment form.

> **Note**: If the cart is disabled on a site, all buttons that would normally read as *Add to cart* will read as *Enroll*. Clicking this button will take the agent to the first page of the enrollment form instead of the cart.

Send Beneficiary Application to Enroll

If the beneficiary has chosen a plan to enroll in, the agent can send an application for a specific plan. Agents can add a plan to the cart, start the application with any information they want to fill in for the beneficiary, and find the *Send to beneficiary* button at the bottom of the last page of the enrollment form.

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| #	TASK	DETAILS
1	Send to beneficiary	From the last page in the enrollment form, click *Send to beneficiary* to choose to send the application by text and/or email.
2	Enter phone and/or email	Type in the phone number and/or email to send the application to the beneficiary. If there is an existing number or email, it will prepopulate. **Confirm the number is a mobile phone and not a landline number.**
3	Send application	Click *Send application* to send the application to the beneficiary. The beneficiary will receive two texts and/or two emails, one with the link and one with the authorization code.

Sample Beneficiary Application Email

This is the email the beneficiary will see when they receive a link to an enrollment application. They will also receive an email with an authorization code to securely authenticate and access the application (see Quoting for example of authorization code email).
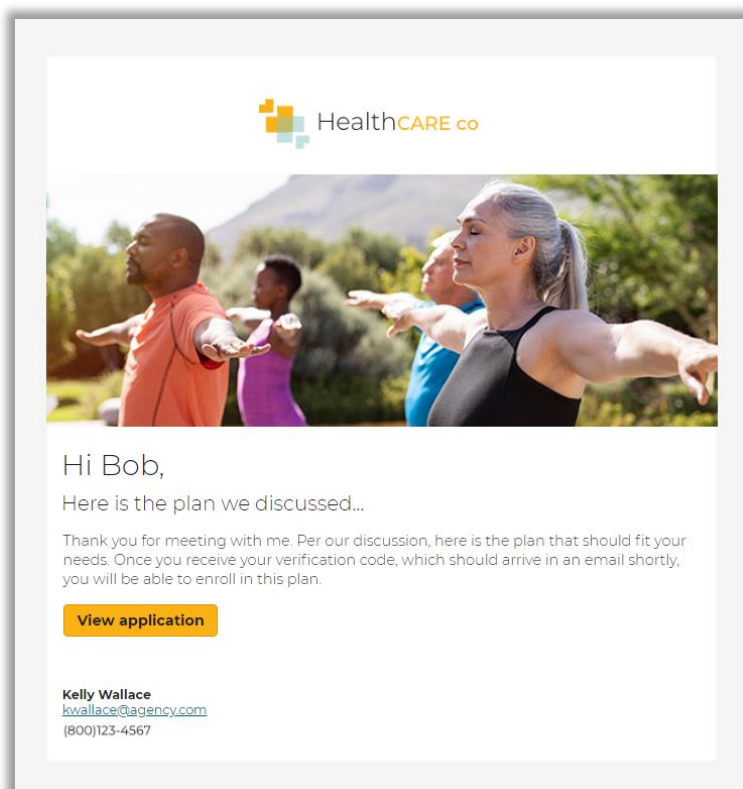
Agent Email Notification of Beneficiary Enrollment

When a beneficiary completes an enrollment, if the agent has an email on file then they will receive a notification email. They can log in to view more information related to the profile and enrollment.
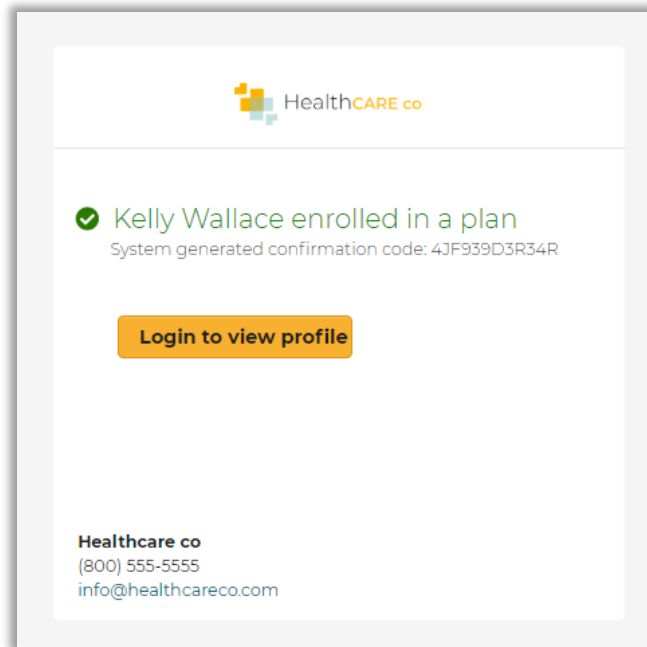
Enrollment History

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, and then scrolling down to the Enrollment history.

For each beneficiary, agents will see three types of enrollment information:

1. Current year in process enrollments at the top of the list. These are applications that have been started but not completed for the beneficiary for the current plan year.

2. Current year completed enrollments 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 includes plan name and other information if available to be displayed.

Enrollment history

Healthcare co choice 5000
last updated 03/06/2020 9:10am PST

Continue enrollment

Total monthly premium **$17.00**

Healthcare co choice value plus 5000

Submitted 11/04/2019 4:53pm PST **1**   Confirmation #123010243sdg   📄 View application **2**
Requested effective date 01/01/2020

📄 Proof of citizenship.jpg   📄 Loss of coverage.pdf   📄 End state renal disease.pdf

+ Dental 5000 + Vision 2000 rider

Total monthly premium **$3.10**

Healthcare co choice value plus 5000

Submitted 12/04/2018 3:26 pm PST   Confirmation #123010243sdg

Total monthly premium **$20.60**

#	TASK	DETAILS
1	View enrollment information	The enrollment history information for this applicant includes the date and time of the application submission, the plan selected for enrollment, and the confirmation number. Agents will also see rider information, documents uploaded during enrollment and the total monthly premium.
2	View the enrollment form	To view a PDF version of the completed enrollment form, click *View application*.

Medicare Supplement

If offered, the Medicare Supplement plan tab will appear on the Plan List page. When selected, agents will be required to answer a series of rate factor questions for the beneficiary prior to viewing plans and rates.

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Rate Factor Questions

Rate factor questions vary by carrier. Rate factor questions displayed are dependent on the plan selected and its service area. All questions in the sample image provided may not display for all plans, only the applicable questions for the plan selected will display. All questions displayed are required.

#	TASK	DETAILS
1	Rate factor questions	Answer all questions presented regarding the beneficiary.
2	Guarantee issue reasons	Select a reason from this area. Clicking on the category to reveal reasons associated with the category. Select the most appropriate reason for guarantee issue.

PlanCompare ONE *Professional*

Plan List

After all rate factor questions have been answered and agent clicked the *Continue to plans* button, available plans and premiums will be presented. Select *Edit your answers* in the banner above the plans to go back to the rate factor questions.

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There may be an occasion when, based on the answers provided to the rate factor questions, no plans are available. When this occurs, a message will appear where plans are normally located. Again, select *Edit your answers* to return to the rate factor questions.

Drug, Pharmacy and Provider Search

The Drug, Pharmacy and Provider Search feature allows agents to bypass the shopping process and search for covered drugs, pharmacies, and providers for a specific plan.

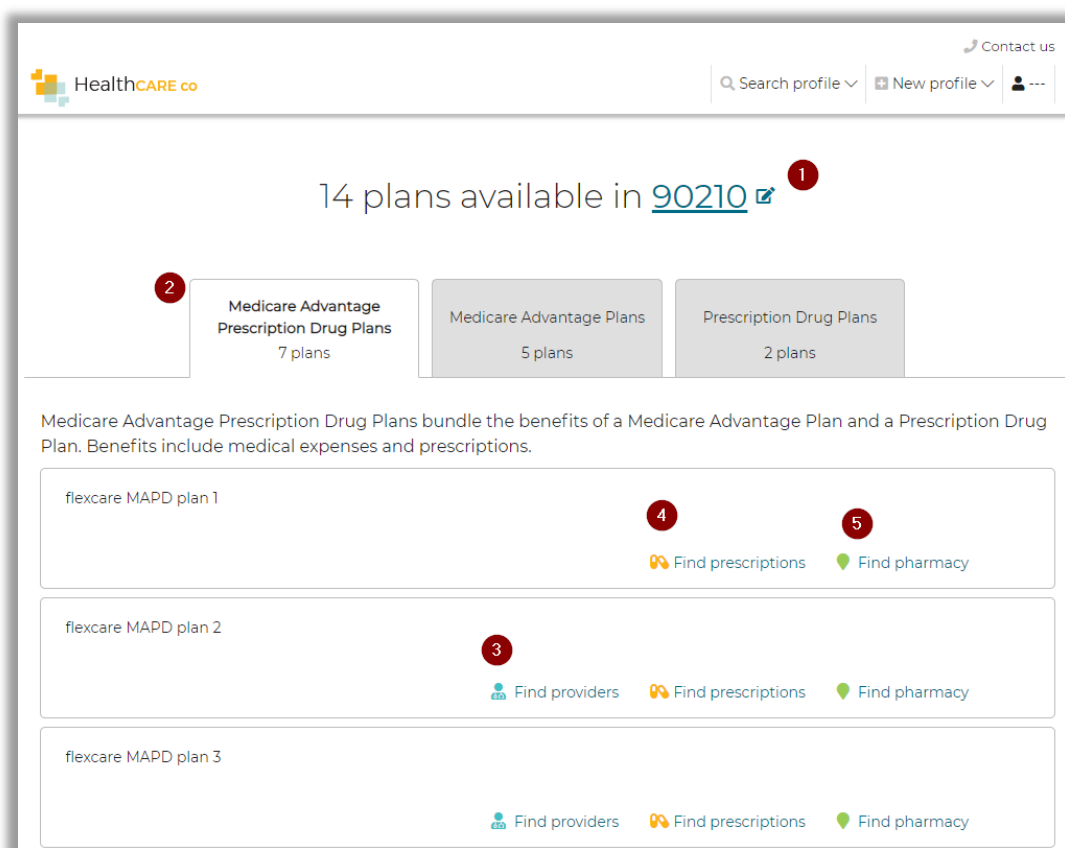This feature may be accessed by clicking this link in the footer:
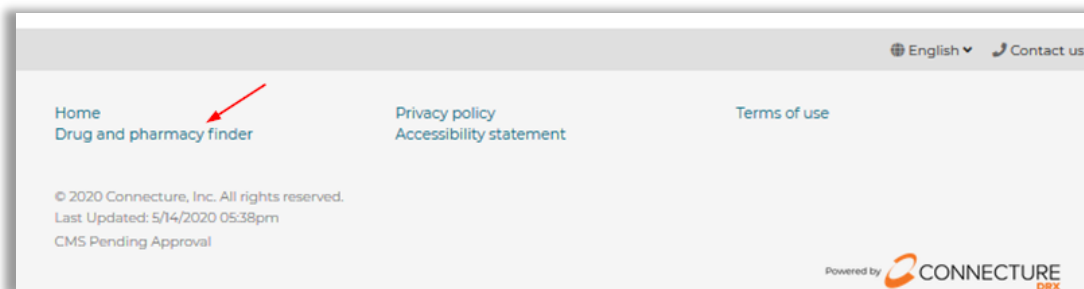
Plan List

Agents will land on the available plans page and need to enter a ZIP code:

PlanCompare ONE Professional
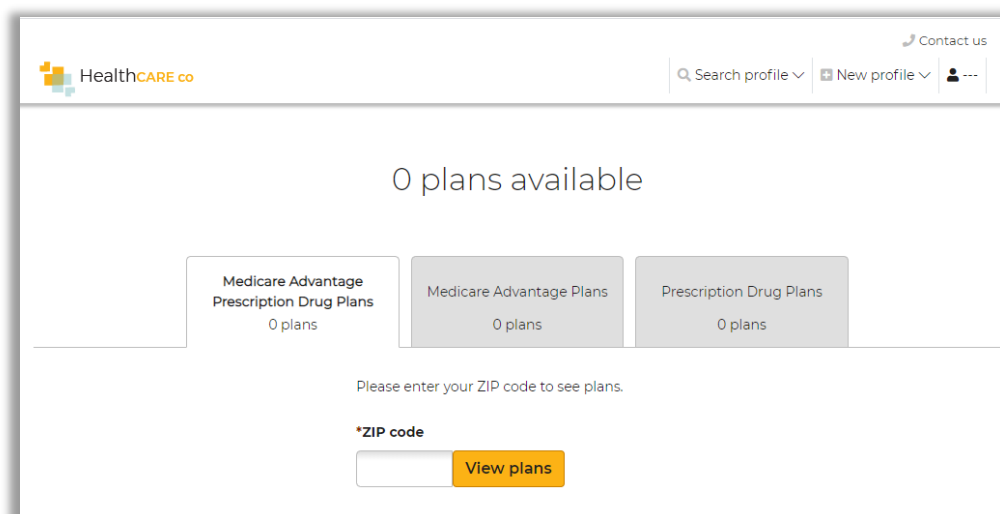
After a ZIP code has been entered, available plans will appear.

#	TASK	DETAILS
1	Edit ZIP code	Edit/update the ZIP code to reveal plans available.
2	Plan tabs	Plan tabs will display for all available plan types. **NOTE**: Medicare Supplement plans are not available to search for this feature.
3	Find providers	This link will be enabled if an external URL is included in the plan data to perform a search for providers for the plan.
4	Find prescriptions	This link will open the Prescriptions tab where a search may be performed for covered prescriptions specific to the plan.
5	Find pharmacy	This link will open the Pharmacy tab where a search may be performed for covered pharmacies specific to the plan.

Find Prescriptions

Select a plan and click *Find Prescriptions* for that plan. Search for the drug by name. Upon typing the name, a list of drugs will appear. Select either the drug name from the drop down or click the search icon.

NOTE: Agents may only search for one drug at a time. Drugs may not to be added to the beneficiary's medicine cabinet in this process. This can be done on the main site. See the Prescriptions section in this document above.

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#	TASK	DETAILS
1	Medicare plans	Click this to navigate back to the plan list.
2	Select dose and form	Select the dosage and the form of the drug.
3	Enter quantity and frequency	Enter the quantity and select the frequency of the drug.
4	Generic vs Brand selection	Select Yes for the direct generic form of the drug or No for the brand form.
5	See if this drug is covered	After making the selections above, click this button to see if the drug is covered and reveal pricing specific to the plan.

Drug Coverage Results

After clicking the *See if this drug is covered* button, the drug will appear in the appropriate tier along with costs associated with the tier. Footnotes associated with the drug will appear below the table.

NOTE: Drug pricing will appear if it is enabled for the feature.

Direct Generic Example

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Brand Example

Restrictions

#	TASK	DETAILS
1	Search prescriptions	Enter another drug name here to search for a different drug.
2	Edit drug	Return to the results page for this drug to edit dosage, quantity, frequency, or switch between brand and generic.
3	Restrictions	Hover over each restriction designation to reveal a description of each restriction.

Find Pharmacy

Click the Pharmacy tab to review in-network pharmacies within the ZIP code.
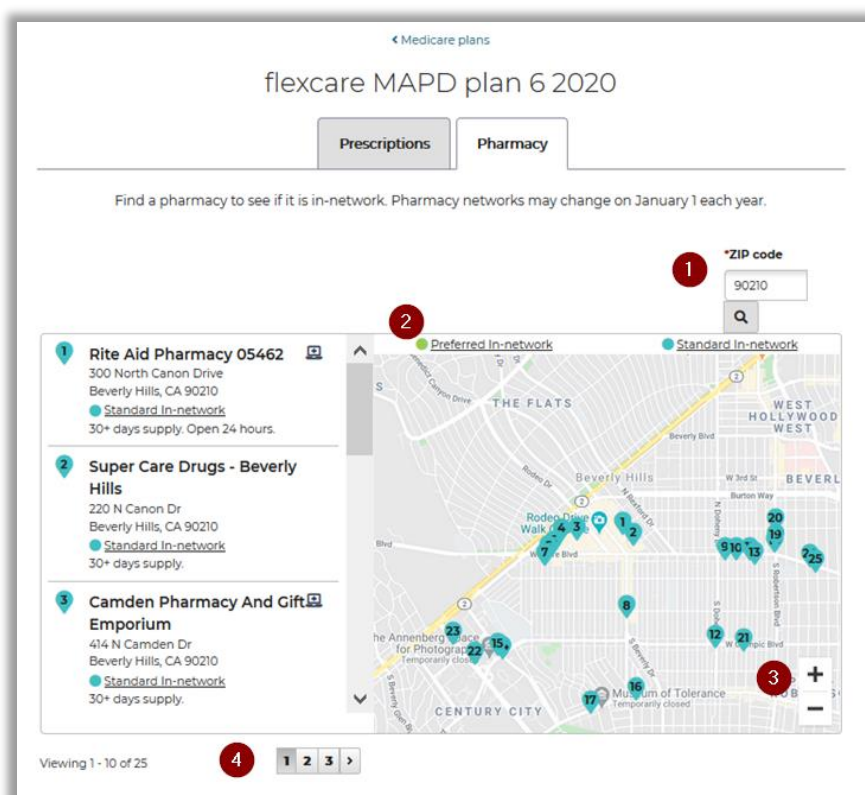
#	TASK	DETAILS
1	Change ZIP code	Enter a different ZIP code to review in-network pharmacies in that area.
2	Preferred in-network Standard in-network	Pins are color coded to indicate if the pharmacy is designated as Preferred in-network or Standard in-network. Click on the pins on the map to view the name of the pharmacy and the address. Pins correspond to the list on the left side of the map.
3	Zoom in/Zoom out	Use the + or – to zoom in and out of the map.
4	Pagination	Click on page numbers to advance the list to the next or previous page.

Agent Account Overview

The Account Overview page allows agents to view and manage their information in the system, as well as access their personalized shopping link. This page can be accessed by clicking the agent's name in the top right navigation bar and selecting *Account Overview* from the menu.

| #	TASK	DETAILS
1	View and edit account information	Account information displays on this page. Site administrator determines the fields agents may edit. After editing, click the *Save* button at the bottom of the page to save changes. If agents need to change any other personal information in this section, contact your site administrator.
2	Access Shopping Link (Personalized URL)	Agent information is included in this link, so agents receive credit for any enrollments completed by the beneficiary who use this link. To provide this link to a beneficiary, copy the URL by clicking the *Copy link* button. Then, agents can paste this URL into, for example, an email.
3	Agent Selling Permissions	Customers have the option to display an agent's selling permissions assigned to them. When available, this will be located at the bottom of the page. It will display each carrier, state, and plan type the agent has permission to sell along with agent ID and start and end effective dates.

Shopping Link (Personalized URL)

Agents can copy their personalized shopping link and share with a beneficiary. When the beneficiary opens the site from the link, they will see the agent's information in the header of every page (see image). Beneficiaries will be able to shop for only the plans the agent is licensed to sell. If a beneficiary creates an account, agents will be able to search for the profile and see any updates made by the beneficiary, such as prescriptions added to the Medicine Cabinet. Agents will receive credit for all enrollments completed on their personal links.
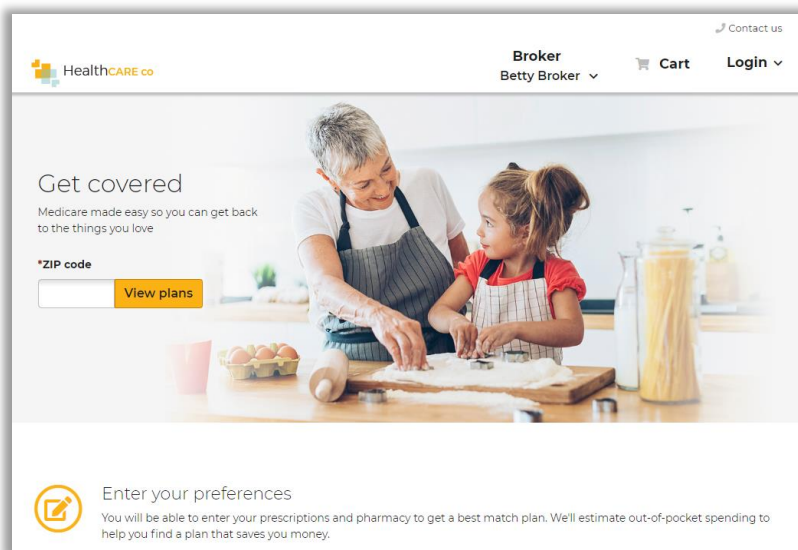
If the agent sent their Shopping Link to a beneficiary and the beneficiary enrolled in a plan, the agent will receive an email notifying them of the enrollment. To receive this notification, the email must be turned on for the site and the agent must have a valid email address in their account.

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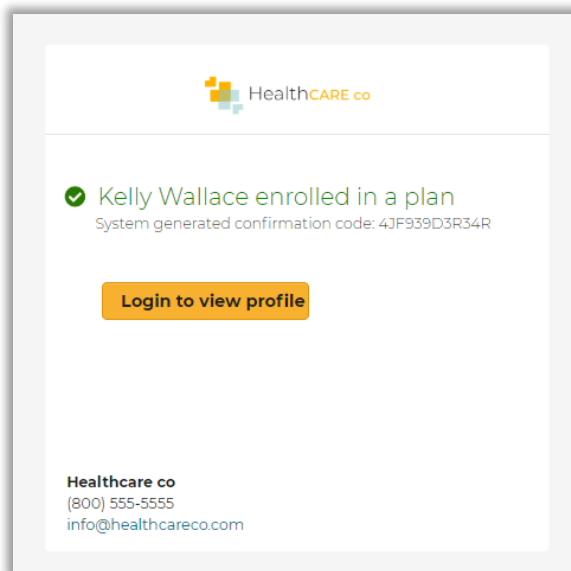
Admin User Functionality

PlanCompare ONE for Professionals users with administrative permissions have access to additional functionality. Additional functionality includes:

- Create new agents
- Search agents
- Edit agent accounts
- See all profiles within the system
- Search beneficiary profiles based on agent assignment

Create Agents

Admin users can create new agents. The *New profile* link in the global header opens a dropdown that allows admin users to select which profile type they want to create:
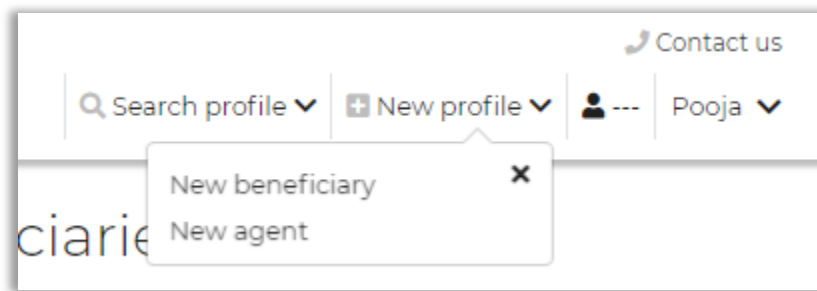
- *New beneficiary* navigates to new beneficiary profile page. See New Profile section above in this document for more details
- *New agent* navigates to the create agent account page

Create account allows agents to create new agent profiles by providing personal and account information for the new agent.

> NOTE: Agent selling permissions need to be loaded with the ASP/ALP file and cannot be created or edited from the Account Overview page for an agent.

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| #	TASK	DETAILS
1	Personal Information	Enter the agent's personal information. The required fields are marked with an asterisk (*).
2	Account information	Enter the agent's account information. The required fields are marked with an asterisk (*).
3	Save	Saves profile if all validations are met and navigates to Account Overview page of the newly created agent where admin user can edit the agent's profile

Search Agents

Admin users can search for agent profiles. The *Search profile* link in the global header opens a dropdown that allows admin users to select which profile type they want to search:
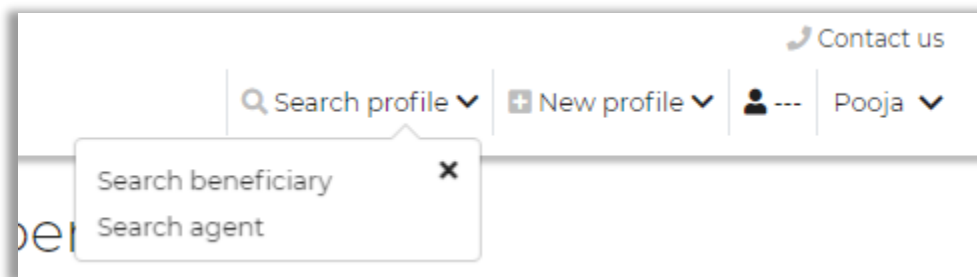
- *Search beneficiary* navigates to search beneficiaries page. See Beneficiary Profile - Search Profile section in this document for more details

- *Search agent* navigates to Admin user to the search agent page. Admin user can fill in the search criteria and click on Search profiles to view search results

#	TASK	DETAILS
1	Enter search criteria	To search for a specific profile, enter the agent's information in the search parameters. Admin user needs to enter information in at least one field with minimum 2 characters. However, entering more information will assist in narrowing the search. To find the agent profiles that match the search parameters entered, click *Search Profiles*.
2	View search results	Agent search results are displayed in alphabetical order of agent last name. Clicking on agent name navigates admin user to the account overview page of that agent. Search results display: Agent first and last name Username Active/Inactive status Indicator if agent has access to that site or not.
3	No search results	If the search criteria do not match any agent information, no results message and option to *search again* is displayed

Account Overview for Admin Users

Admin users can edit their own and other agent's account information. Admin users can view and edit additional fields that non-admin users do not have access to.

#	TASK	DETAILS
1	Personal Information	Admin users can edit all fields in this section.
2	Account information	Admin users can access view additional fields like Agency Name, Agency ID, Agent ID, Account Status, Site access and Expiration date

Roles and Permissions

The table below describes the user roles and associated permissions available on PlanCompare ONE for Professionals. These are general access permissions. Individual agent permissions to sell plans in a multi carrier setting are defined elsewhere.

ROLE	PERMISSION
Quoter	May create and view all prospect profiles.
Quoter_Broker	May create and view own profiles.
Quoter_Admin	May create/view profiles on all agent and agency accounts.
Enroller	May create/view all prospect profiles on all accounts and enroll.
Enroller_Broker	May create/view own prospect profiles and enroll.
Enroller_Admin	May create/view all prospect profiles on all agent and agency accounts and enroll.