# **MedicareLINK**

### MedicareLINK

SunfireMatrix 2021Training Guide

# **Communications**

** **	Report Type	ommunications						
<b>⊲</b>	Communicatio	on search y Y						
	Communication 2 communications Sort by Date sen	ons s						
	First name	Last name	Туре	Status	Sent date	Time	Sent to	Enrollment code
۵	Marie	Gray	Proposal	Sent	2020-07-15	12:23pm ET	m@g.com	
?	Tim	Barton	Consumer	Sent	2020-07-15	12:22pm ET	t@b.com	

If you navigate to your Reporting Tab and click "Communications" you'll be brought to the Communications tracker.

# **Communications (cont.)**

If you send a customer a link to your purl ("Consumer") or a plan proposal email ("Proposal"), a record of when you sent the link and whom you sent it to will appear here.

If the customer clicks on the link, the status will change to "Clicked." If after clicking the link they enroll in a plan, the status will change to "Enroll" and the enrollment code for the app will be shown in the right-most column, "Enrollment code."

To learn how to send a link to your purl, see our post "How To Send A Purl."

To learn how to send a plan proposal email, see our training video "Send A Quote/Plan Proposal Email."

Enrollment app e-sig requests and SOA e-sig requests are tracked via those respective sections of our tool, and will not show up here in "Communications." For help with app or scope e-signatures, see our FAQ articles on e-sigs and scopes.

# **MedicareLINK**

### **Customer Profiles**

SunfireMatrix 2021Training Guide

## **Prospects for the last 30 days**

Search prospects	• *	Quote & Enroll	Send a so	cope
Prospects for las	t 30 days	View all for last 30 days View o	lder prospects	Enrollments for the last 30 days
ast name starts with:	A B C D	E F G H I J K L	M N O	2 133 Successful 😢 17 Incomplete
First name	Last name	Disposition	Action	Resources

Customers who you've entered into the tool within the last 30 days will appear in the "Prospects for last 30 days" area of your homepage.

# **Prospects for the last 30 days**

<u></u>			Send a so	cope	Reporting
Prospects for last 3	30 days Vie	w all for last 30 days Vie	w older prospects	Enrollments for the	last 30 days
Last name starts with:	A B C D P Q R S	EFGHIJKI TUVWXYZ	LMNO	V 133 Successful	17 Incomplete
First name	Last name	Disposition	Action	Resources	

Customers who you've entered into the tool within the last 30 days will appear in the "Prospects for last 30 days" area of your homepage.

By default, this list is alphabetized. To narrow it down, you can click one of the "Last name starts with" letters to show only applicable prospects.

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### **Prospects for the last 30 days**



For example in the screenshot above, the letter "K" has been clicked, so only customers with the last name beginning with a K that have been entered into this agent's tool will appear. **Note: Just because a prospect does not appear here does not mean that they have are missing from your tool.** If a prospect was entered into your tool over 30 days ago, you can click the "View older prospects" link to search for them, or see our post "Cannot find customer."

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# **Dispositions**

			Active		
Edit cu	tomer profile		New		
First nam	• Tim	Last name* Smith	Duplicate Deceased	ode 33760	
Phone		Email	Ineligible Left voicemail Follow-up	of birth mm / dd / yyyy	Cancel
Search	criteria	Date of birth mm /	Sent scope Sent PPE Sent PURL Sent app link	one Disposition	~
Last name			Sent eSignature		

Dispositions are shown beside the customer's name in the active customer area of the page (near the top, see screenshot), as well as in search results when you search for them by last name.

# **Dispositions (cont.)**

They are designed to help you keep track of where a customer is in the enrollment process.

Disposition is set automatically when a customer is enrolled as "Enrolled" or "Enrollment Error" when, respectively, an enrollment app is successfully or unsuccessfully submitted for that customer. Those two dispositions cannot be selected by you. Any other disposition can be set by you at any time as you see fit.

Dispositions are not communicated to carriers, and are purely for your own use and reference.

\*\*If you have duplicate records for the same customer, you can set the disposition of the duplicate record to "duplicate" to avoid confusion.

### **Duplicate Customer Profiles**

Customer profiles cannot be deleted as of now. As you get more comfortable with the tool, you'll find that accidental duplicate customer records are generated less and less often.

We strongly recommend editing existing customer profiles when you would like to update their information, rather than creating new ones that can't be deleted.

For how to find customer records, see our post "Cannot Find Customer."

If you do create a duplicate customer record by accident, we recommend changing the "name" on the duplicate record to something like "null" or "void" so that it is not mistaken with the "real" Slim Shady. Another option is to set the disposition of the duplicate record to "Duplicate." See our post "Dispositions" for more on this.

If you have two customers with the same name, we recommend adding their middle initial to the first name field in their profile. For example if you have two customers John Doe, and one has the middle initial "A", you would type "John A" into the first name field of that person's customer profile. Then you'd have two records, John Doe and John A Doe.

First name*	John A	Last name*	Doe	ZIP code	33040		
Phone		Email		Date of birth	mm /	dd	/ yyyy

# **Cannot Find User**

Customer records cannot be deleted, so rest assured if they were saved, they are in the tool. Search for the customer to find them:

Click "Search prospects" or click the "Customers" icon



# **Cannot Find User (Cont.)**

Search by any field shown here: Last name, DOB, phone, or Disposition. We recommend searching by only one of these fields. You can search by partial last name if they are not coming up.

** **	Customer profiles						New profile
	Search criteria Last name bu	Date of birth mm	/ dd / уууу Phone	Disposition	~		Clear Search
~	Search results First name	Last name	Date of birth	Email	Phone	Disposition	Actions
	Jimmy	Buffett					i.

# **Cannot Find User (Cont.)**

Once you find the customer, click the three dots below "Actions" and you'll have several options including editing their profile viewing their quote, scope, enrollment, etc. if those have been completed.



You can also find customers using the "Prospects for last 30 days" window on your dashboard, if you have it. For more on that see our post "Prospects for last 30 days."

### **Understanding Customer Profiles**

The customer profile is purely for record-keeping, and to help you access saved quotes using a customer's name rather than a personal code.

The information entered into a customer's quote, such as zip code (on the census page), medications, health status, etc. is saved to their quote. View their quote by searching for the customer by last name and clicking "view quote."

Now, what about all the info entered into the customer profile?

## Name, Birthdate, Email and Phone

- This information in the customer profile is purely for record keeping
- It does not automatically go through to the app
- They have to be confirmed each time they are entered into an enrollment app per compliance, so they cannot be prefilled and have to be manually entered into the app (as of now).
- Always ensure they are entered correctly into an enrollment app

# **Zip Code In Customer Profile**

- Zip code can be recorded in the customer profile for record keeping
- To jump to a quote in the zip entered, click "Save & Quote" (see screenshot)
- Always confirm the customer's zip when beginning a quote or enrolling a customer, and ensure you are quoting in the correct zip

First name*	Skippy	Last name*	Test	ZIP code	33010		
Phone		Email		Date of birth	mm / dd / yyyy		
						Cancel	Save Save & Q

Note: If you edit the zip code on the census page, it will not automatically update their customer profile, but it will update the zip code of the quote you are running for that customer and be saved to that customer's quote along with their drug list, health status, etc.



This information is purely for your own use and record-keeping.

To learn more about this feature, see our posts about Dispositions.

# **MedicareLINK**

## eSignatures

SunfireMatrix 2021Training Guide

### **Video: e-Signatures**

Here is our training video on how to use the e-Signature function.

We recommend staying on the phone with the customer until they finish signing whenever possible. For further questions, see our other posts on this topic, covering troubleshooting, sending a new link to e-Sign, and more.



# How Do I Send a New Link to e-Sign?

Before initially sending a link, see our post "e-Signature Best Practices" and our training video "e-Signatures via Text/Email."

Note: e-Signature links are valid for 24 hours. If the customer does not sign within 24 hours, the app will have to be resubmitted. We are working on an enhancement that will make this easier, and will be out as soon as possible.

#### How to send a new link:

- After you click "Send text" or "Send email" you'll see the "Send" button turns into a "Cancel" button (see screenshot below)
- DO NOT click "End Enrollment" yet
- Remain on the phone with the customer, ensure they can find the e-Sign request, and help them e-Sign if possible
- If you need to send a new link to e-Sign or need to edit the app, click the "Cancel" button. Now you can select a new email/mobile number to send the e-Sign request to, or can go back and make any needed edits to the app
- When ready, send the new e-Signature similar to how you did initially
- Note that there will now be a new personal code shown, and the customer will have to use this new personal code to e-Sign this time

# How Do I Send a New Link to e-Sign? (Cont.)

<ul> <li>e Signature (oustomer pre</li> <li>Signature pad (customer p</li> <li>Sendie-Signature request (</li> </ul>	en() esent) sustamer an phone)			
Email				
Warn customer that the enro	liment form may appear in	their Junk or Spam folders.		
mall Address*	Canoel			
resignestrout				
Personal code: 806889 This personal code will expire after 24	tours			
Personal code: 806889 This personal code will expressive 24	mer to complete e	nrollment		

#### How do I send a new e-Signature request after clicking "End Enrollment"?

- We don't support this currently; we will be adding the ability to do so.
- For now, you will need to complete a new app

# **Troubleshooting e-Signatures**

#### What if the customer has not received the e-Signature link?

- Confirm the email/number to which the link was sent
- Ask the customer if they have a good cell/wifi/internet connection
- If sent via email, ask them to check their spam/junk folder
- If none of that works, try sending a new link to a different number or email address (see "How do I send a new link to e-Sign?")

# e-Signature Miscellaneous Troubleshooting

#### Space in Name Error:

- Sometimes seniors mistakenly type a space at the end of their first or last name. The tool will throw an error in this case.
- Ask them to delete the space at the end of their name
- If that doesn't work, have them enter their name again letter-by-letter, not using auto-correct and ensure they don't enter a space at the end of their name

#### **Birthdate Error:**

- The birthdate they enter into the link must match the birthdate as it was entered into the app
- If the birthdate they are entering is different from the one in the app, then either they are mistyping their birthdate or the birthdate in the app has to be updated. See the steps in "how do I re-send a link to e-Sign?"

#### Blank Screen After Clicking Link:

- Have them try again in a different browser, preferably Chrome
- Try having them clear their cache/history and click the link again

### e-Signature Best Practices

e-Signatures are designed to be used while you are still on the phone with the customer whenever possible. The whole process, from sending an e-Signature to the customer completing it, can take as little as 30 seconds if the enrollment has already been reviewed with the customer.

#### If you remain on the phone with your customer for the entire e-Signature process:

- You can make sure they are able to find the e-Signature link
- You can send a new link to a different email address or mobile number if needed
- You can assist them in e-signing
- If incorrect info is found on the app you can go back and edit it if needed, then send a new e-Signature link

# e-Signature Best Practices (Cont.)

If it is not possible to remain on the phone with the customer while they sign:

- Make sure they have received the e-Signature request before ending the call
- DO NOT click "End Enrollment" until the customer has confirmed they have received the link to e-sign
- This way you can re-send the link if needed
- Provide them with the personal code shown, which they need to access the eSignature page
- Once you click "End Enrollment," if the customer has any issues with the e-Signature, you'll have to complete a new app for them to sign. We are in the process of changing this so that a new link to e-sign can be sent in this scenario.

To learn how to complete an e-Signature, please see our training video on the subject.

• For troubleshooting, see our post "Troubleshooting e-Signatures"

# **MedicareLINK**

### Enrollments

SunfireMatrix 2021Training Guide

### **C-SNPs**

If you are certified to sell C-SNP plans, you will find that an increasing number of C-SNP plans are offered through the SunFire tool.

These plans are found, just like D-SNPs, by selecting the "Special Needs" plan type radio button.

3 plans found in 33010 Sort Mon	thly premium 👻 Time period: Annual 👻 Di	splay: Plan costs P	tan benefits		
Plan type	Allwell Dual Medicare (HMO D-SNP)	ESTIMATED ANN	UAL COSTS	Max. out-of-pocket: \$3,4	100
Medicare Advantage/Part D	Allwell	Total:	\$0	(in-network)	
Medicare Supplement	H5190-004-000	Health:	\$0	Health deductible:	\$0
Medicare Advantage     Special Needs		Drug:	\$0	Drug deductible:	\$435
Eilfor by	🗌 Compare / Email Quote 🛛 💄 Find doctors	\$0.00 Monthly p	remium		🗮 Detail
Company	Preferred Medicare Assist /HMO D.			Max out of pocket \$3.4	00
AIDS Healthcare Foundation	SNP) UnitedHealthcare	Total:	\$0	(in-network)	
Doctors HealthCare Plans,	H1045-012-000	Health:	\$0	Health deductible:	\$0
Inc. Guidewell Mutual Holding Corporation	★★★☆☆ 4 out of 5 stars	Drug	\$0	Drug deductible	\$435
Humana Inc.     Longevity Health Plan	📋 Compare / Email Quote 🔹 Eind doctors	\$0.00 Monthly p	remlum	E	Details Enroll
MMM of Florida, Inc. Molina Healthcare, Inc.,	DrCare (HMO-POS C-SNP)	ESTIMATED ANN	UAL COSTS	Max. out-of-pocket: \$4,5	i00 (in-network) /
UnitedHealthcare	Doctors HealthCare Plans, Inc.	Total:	\$0	\$4,500 (combined)	
WellCare Health Plans, Inc.	H4140-003-000 Star Rating, Plan too new to be measured	Health	\$0	Health deductible	\$0

As you know, there is a list of questions the customer must be asked to determine if they qualify for a C-SNP plan or not. These questions are visible once you begin an enrollment with the customer.

# **Video: Enrollment**

• This how-to video outlines the basics of completing an enrollment using our tool.

SunFireMatrix Med	licare Plan Search Customer: Joe Hall			2 Aaron White
28 plans found in 10506 Sor	t: Monthly premium  Time period: And	nual 🔻 Dist	play: Plan costs	Plan benefits
Plan type	Aetna Medicare Elite Plan (PPO)	ESTIMATED A	NNUAL COSTS	Max. out-of-pocket: \$6,700 (in-
Medicare	Aetna Medicare	Total:	\$0	network) / \$10,000 (combined)
Part D	H5521-120-000	Health:	\$0	Health deductible: \$1,000
Medicare     Supplement	4 out of 5 stars	Drug:	\$0	Drug deductible: \$245
Medicare     Advantage				(excludes tier 1 and 2 drugs)
Special Needs	Compare / Email & Find Quote doctors	\$0.00 Month	ly premium	Enroll
Filter by				
Company	Affinity Medicare Passport	ESTIMATED A	NNUAL COSTS	Max. out-of-pocket: \$6,700
Affinity Health	Essentials (HMO)	Total:	\$0	(in-network)
Services Holdings,	H5991-003-000	Health:	\$0	Health deductible: \$0
Inc. Anthem Inc. Elderplan, Inc.	★★★ 3 out of 5 stars	Drug:	\$0	Drug deductible: \$295 (excludes tier 1 and 2 drugs)
MVP Health Care, Inc. ParkerCare New	Compare/Email Line Compare/Email Compare/Email Compare/Email Content C	\$0.00 Month	ly premium	<b>⊞</b> Detail

# **"Enrollment Form Not Found"**

If you get this error, retry viewing the enrollment form after trying each of these steps in order:

- Click ok and try again
- Confirm your internet connection is solid
- Clear your cache
- Ensure you're in the Chrome browser, our recommended browser

#### If none of that works, contact your manager or internal support team and provide:

- Your NPN
- The zip code you are searching in
- The carrier and plan id of the plan

# What if there's a Typo on the app?

On the last page of all apps, we provide a summary where you can review the information entered with your customer. If you use a texted or emailed e-signature link, the customer can also review the app before signing.

If a typo on an app is found before submitting the app, edits can be made and the customer will need a new link to sign. See "How do I send a new link to e-Sign?"

If a typo is found on an app after submission, your manager needs to be notified as soon as possible. Once an app has been sent to the carrier, it cannot be changed via SunFire and you will have to contact the carrier to correct the typo.

# Why isn't an app in my carrier portal?

If an app is not on your book of business or you have not been paid, follow these steps, in order:

- Check that there are no errors on the app and that the app was submitted successfully (see "How do I know if there's an error on an app?")
- Check that it has been 10 business days since the app was submitted
- Check that the member wasn't already enrolled in the same plan
- Call the carrier's Agent Support Line to inquire. Sometimes the carrier will say "we have no record of the app" if the app was denied, so if they say that, you should ask the carrier if the app has been denied.
- If none of these steps identify the issue, contact your manager.

Carrier processing times are often faster than 10 business days, but they are out of our control and depend on what is going on internally at the carrier and time of year. We send apps to the carriers daily, and in some cases instantaneously.

# Errors: How do I know if an app has an error?

- Just because there is an enrollment code for an app doesn't mean the app has been submitted. Always confirm that an app has been successfully submitted by using one of the methods below.
- When completing enrollment apps, you'll see that the tool doesn't let you move on to the next page of the app until all the required information has been entered, each part in it's correct format, and all required questions have been answered.
- Even so, sometimes there are still errors when the app is submitted. This will be shown in several places:

# Errors: How do I know if an app has an error? (Cont.)

#### **Upon Submission**

• Right after you click submit, you'll be brought to a page like the one below, stating either that the app was successful or stating the error that occurred. \*Note: the "error code" shown in parenthesis is the enrollment code for the app.

Your enroll	ment submission ha	as failed. Your cus	Annan Willingthan			
			stomer will not be	nrolled in the pl	an.	
		Error	message received from The SEP code field is in	CarePlus: alid.		
Please note: This e	rror has been recorded with the	current enrollment informati	on. (Error code: T9G8Y22QKI	-		
Options:	eturn to form Save and close	Enrollment error v				

- You can click "Return to form" and correct the error with the customer, and they will sign the app again
- You can also save & close, but remember to come back to it later since the app has not been submitted!

# Errors: How do I know if an app has an error? (Cont.)

#### **Reporting Tab**

• In your Reporting tab, the status will be shown as a red X (rather than a green check mark). If you click on the 3 dots below actions, you can either View or, depending on the reason for the error, Open and correct the app.

Enrollment search							
Time frame 🛛 Today 🗸 🗸	v						
Enrollments							
Enrollments 1 enrollment Sort by Most recent	4						
Enrollments 1 enrollment Sort by Most recent	▼ First name	Last name	Carrier	Status	Date	Time	Action

# Errors: How do I know if an app has an error? (Cont.)

#### Viewing App After Submission

• If you view the app after submission was attempted, it's submission status will be shown at the top of the app, similar to in the screenshot above.

#### **Customer Search**

• Finally, you will be reminded that this app has an error when you search for your customer by last name. Their disposition will automatically be set to "Enrollment error." See our post on "Dispositions" for more info

	Customer profiles							New profile
	Search cl	riteria gold	Date of b	nons mm / dd / yyyy	/ Phone	Disposition	×	Clear Search
•	Search re First name Ann	esults •	Last name Gold	Date of birth	Email	Phone	Disposition Enrollment error	Actions
	Cust	omer	: Ann Go	Id 🗅	Enrol	Iment error	✓ Sav	/e

# **Troubleshooting Enrollment Errors**

Most of the errors we display are self-explanatory. Here are some of the trickier ones:

#### "App Not Signed"

- The customer did not e-sign within the 24 hours they had to do so.
- A new app will have to be written and signed.
- Soon we will enable a way for you to re-send signature requests when this is the case.

#### "Invalid SEP Code"

- Another, valid SEP code will have to be selected
- Sometimes rather than Codes, you may see SEP "Reasons" such as "I recently turned 65." This is what this error is referring to, and a different, valid reason will have to be selected

# **Troubleshooting Enrollment Errors (Cont.)**

#### "Unknown Error"

If you get the error "An unknown error has occurred submitting the enrollment" after you submit an app, it could be one of two things:

- There may be an issue with your certification to sell the plan or your writing number
- We were unable to communicate with the carrier's server at the moment the "Submit" button was clicked
- Note that this error should only occur with Humana & Anthem plans. Here's what to do:
- Try again right away, while your customer is on the phone
- If that doesn't work, end call with customer and make sure you are certified to sell this plan in the state selected
- If you are certified to sell plans from that carrier in that state, check your RTS status in our tool. Navigate to your agent profile, then click "generate." See screenshot below.



- If your RTS looks good, try submitting again later in the day and contact your manager with difficulties. See our post "How do I send a new link to e-sign?" if applicable.
- If you do not have RTS, check with your manager and/or the carrier if you feel there is an error.

## **Enrollment Codes**

Just because there is an enrollment code for an app doesn't mean the app has been submitted successfully.

Enrollment codes allow you and your support staff to keep track of each app, whatever phase it is in. They are generated:

- When a partially completed app is saved
- When an app is submitted successfully
- When an app is submitted unsuccessfully

Always confirm that an app has been successfully submitted. This is shown to you immediately after clicking "submit." See our post "How do I know if an app has an error?" for more on apps with errors.

# **MedicareLINK**

# **Notifications**

SunfireMatrix 2021Training Guide

# **Notification Definitions**

To opt in to Notifications via email and/or text, see our post "Setting Up Mobile Notifications."

Here are the notifications you will receive when you opt in:

- "Scope signed" The customer signed the scope that you sent them, and it is ready for you to sign if you have not done so already
- "Online enrollment" Customer completed an app on your purl
- "eSignature complete" Customer signed an app via an e-Signature link
- "eSignature incomplete" You have sent this customer a link to sign, but they have not yet signed and still have time to do so. Remember, e-Signature links expire after 24 hours.
- "eSignature past due" The customer did not sign within 24 hours and their link to do so has expired. They will need a new link to sign sent to them. See our post "How to send a new link to e-Sign"

**NOTE:** Notifications via text/email regarding enrollment apps will have an enrollment code in them. This is especially important if you have more than one notification for the same person. Use these enrollment codes to determine which specific app the notification is referring to.

# **Viewing Notifications**

	Jon	Liu				1
	Tim	Smith		Er	rolled	1
<u> </u>	5	< Pre	vious	1 2	Next >	
θ			20000000			

You can view notifications by clicking on the bell icon in the lower left-hand corner of the page, shown above. If you have unread notifications, the bell will have a red circle with a white number in it to show the number of unread notifications, just like with unread emails or texts on mobile phones.

	Jon	Liu		E
	Tim	Smith	Enrolled	I.
4		< Previo	HIS 1 2 Next >	
Θ	-			

# **Viewing Notifications (Cont.)**

When you click on the bell icon, you will see the actual notifications themselves. New notifications have a blue dot beside them. If you click on any notification, it takes you to the app or scope that is mentioned. For instance, if we click on the second notification on this list, "eSignature past due" for "Douglas Allen" we will jump to view the enrollment that Mr. Allen did not sign.



If you'd like to opt-in to receive these notifications via text and/or email, see our post "Setting Up Mobile Notifications."

If you opt-in to mobile notifications, you will find that the mobile notifications include, if applicable, the enrollment code associated with the notification. This way if you have multiple apps for the same person, you can tell which app the mobile notification refers to by looking at the enrollment code shown.

For clarification on what each notification means, see our post "Notification Definitions."

# **Setting Up Mobile Notifications**

If you opt in to notifications in your agent profile, you will receive notifications via text and/or email when a customer:

- Signs an app via an e-Signature link
- Signs a Scope
- Has not yet signed and still has time to do so
- Did not sign within 24 hours and their link to do so has expired
- Completes an app on your purl

Each mobile notification will have a customer name and, if applicable, an enrollment code tied to it. This was you can see which enrollment the notification is referring to.



# **Setting Up Mobile Notifications (Cont.)**

To opt in to or out of notifications:

- Visit your profile (see "Changing your username and password" for how to visit your profile)
- In the notifications section, check the boxes for the types of notifications you'd like to receive- See screenshot below
- If you select text notifications, you must continue to the Contact Information section and select "Text" checkbox beside the number at which you'd like to receive the text notifications

Here's an example of what you'll receive in an email notification:

Dear Brian,
You have a received a new notification.
eSignature past due
Customer: John Terrific
Confirmation code: J92AJVDX0Q
This e-mail, including any attachments, is intended solely for the use of the individual or entity to which it is addressed. If the reader of this e-mail is not the intended recipient, the reader is hereby notified that any dissemination, distribution, use or copying of this e-mail is strictly prohibited. If you have received this e-mail in error, please notify the sender by reply e-mail and destroy this e-mail immediately

# **MedicareLINK**

### **Personal Code**

SunfireMatrix 2021Training Guide

## **Video: Recalling Saved Sessions**

This training video will walk you through how to make the best use of saved sessions, cover best practices, and show how to make sure that a customer's quote isn't overwritten or deleted by accident.



# **Video: Helping Customers On Your Purl**

If a customer is on your purl and has a question, this video covers some of the ways you can help them.

In addition to what's shown in the video: If a customer is in the middle of completing an enrollment app, they can still give you their personal code and you can pull their app up on your end. Use the same method shown in the video below.

If customers can't access your purl, see our posts "How To Send a Purl" and "Purl Troubleshooting."



# **MedicareLINK**

### **Personal URL**

SunfireMatrix 2021Training Guide

# **Purl Troubleshooting**

Issues with purls are very rare, but not impossible.

Note that:

- Only plans you are certified to sell will display on purl sites
- SNP and Med Supp plans will not currently display on purl sites, regardless of your appointments/certs.

If you are experiencing any issues with your purl, here are the troubleshooting steps:

- 1. Ensure the link is correct. If you're not sure what the correct link is, try sending a link to yourself in the manner described in our post "How to send a purl"
- 1. Ensure the purl is being viewed using one of our recommended browsers:
  - Chrome (preferred)
  - Firefox
  - Safari
  - Microsoft Edge

If none of that works, have the customer clear their cache and browsing history.

### **Video: Purl Site Overview**

For the best way to send/view your purl, see our post "How to send a purl."

If you would like to know what your purl is you can watch the video below, or simply send a purl to yourself (enter yourself as a customer in your tool, then follow the steps in the post "How to send a purl.").



# How To Send a Purl

The best way to send someone your purl is to use our "send purl" feature. This avoids the possibility of typos that could cause the link either to not work or for someone else to get credit for the sale by accident.

You can also send your purl to yourself using this method if needed.

- 1. Find the customer record. You can do this in one of several ways...see our post "Cannot Find Customer" for the ways to find a customer record
- 2. Click the three dots below Actions to bring up the Actions menu
- 3. Click "Send purl"

Customer profiles							New p	
Search criteria								
Last name	johnson	Date of birth	mm / dd / уууу	Phone	Disposition		~	
							Clear	Sea
Search r	esults						Edit profile	
Search r	esults e Last	name	Date of birth	Email	Phone	Disposition	<ul> <li>Edit profile</li> <li>i≡ Start quote</li> </ul>	ctions
Search re First name	esults e Last	name	Date of birth	Email	Phone	Disposition	<ul> <li>Edit profile</li> <li>Start quote</li> <li>Send personal URL</li> </ul>	ctions

# How To Send a Purl (Cont.)

4. Enter the customer's email address into the popup. Their name will be pre-filled. Click send once you've verified the correct email address has been entered.

	Email link to c	onsume <mark>r site</mark>	×
	First name*	Tanya	
	Last name*	Johnson	
	Email*		
nan			Send
nson			

# **MedicareLINK**

### **Quoting** SunfireMatrix 2021Training Guide

### **Video: Recalling Saved Sessions**

This training video will walk you through how to make the best use of saved sessions, cover best practices, and show how to make sure that a customer's quote isn't overwritten or deleted by accident.



If you are certified to sell C-SNP plans, you will find that an increasing number of C-SNP plans are offered through the SunFire tool.

These plans are found, just like D-SNPs, by selecting the "Special Needs" plan type radio button.

23 plans found in 33010 Sort: Mon	thly premium v Time period: Annual v D	isplay: Plan costs P	lan benefits		
Plan type	Allwell Dual Medicare (HMO D-SNP)	ESTIMATED ANN	UAL COSTS	Max. out-of-pocket: \$3,4	.00
Medicare Advantage/Part D     D	Allwell	Total: \$0		(in-network)	
Medicare Supplement	H5190-004-000	Health:	\$0	Health deductible:	SO
Medicare Advantage     Special Needs	KKK/W/ 2 001 01 2 50815	Drug:	\$0	Drug deductible:	\$435
Filter by	📋 Compare / Email Quote 🛛 💄 Find doctors	\$0.00 Monthly p	remium		🗮 Detail:
Filter by Company Atha Inc. AlDS Healthcare Foundation	Proferred Medicare Acciet (HMO D	COTMATED ANN	UAL COSTS	Max and of peoplet P2	00
	SNP) UnitedHealthcare	Total:	\$0	(in-network)	00
Doctors HealthCare Plans,	H1045-012-000	Health:	\$0	Health deductible:	SO
Inc. Guidewell Mutual Holding Corporation	★★★☆☆ 4 out of 5 stars	Drug	\$0	Drug deductible	\$435
Humana Inc.     Longevity Health Plan	📋 Compare / Email Quote 🛛 🌡 Find doctors	\$0.00 Monthly p	remlum	E	Details Enroll
MMM of Florida, Inc. Molina Healthcare, Inc., Solis Health Plans	DrCare (HMO-POS C-SNP)	ESTIMATED ANN	UAL COSTS	Max. out-of-pocket: \$4,5	00 (in-network) /
UnitedHealthcare	Doctors HealthCare Plans, Inc.	Total:	\$0	\$4,500 (combined)	
WellCare Health Plans, Inc.	H4140-003-000 Star Pating: Plan too new to be measured	Health:	\$0	Health deductible	SO

As you know, there is a list of questions the customer must be asked to determine if they qualify for a C-SNP plan or not. These questions are visible once you begin an enrollment with the customer.

## Video: Send a Quote/Plan Proposal Email

This video explains how to email a plan to a customer so that they may review it and self-enroll in the plan.

Once you send a plan to a customer as described above, their actions (clicking on the link/enrolling in the plan) are tracked in your "communications" tab. For more on that, see our article on "Communications."

# **Customer Drug List Self-Update**

Customers can input their drug list (and health status, if they wish) themselves. Soon they'll be able to add/update their doctors, too. Using the method below, you'll be able to pull up everything they entered and confirm their selections as well as their zip code.

Steps 3 and 4 are critical!

- 1. Send the customer a link to your purl. See our post "How To Send A Purl" for how to do that.
- 2. For how to pull up what the customer entered on your purl, see the video below.
- 3. Before they leave your purl, make sure they save the link so they can return and edit their info next time. Here's how they do that:

There's a button "Save Progress" that they'll see after they enter their info. When they click it, there will be a link shown in a popup.



# **Customer Drug List Self-Update (Cont.)**

The customer can now either right-click the link and bookmark it, or click the "Copy" button and create a new bookmark, pasting the link into the bookmark, or save the link wherever they choose on their computer.

Another option is they can copy/paste the link into an email and email this link to you, and you can save it to their record in your CRM.

4. Next time the customer wishes to meet with you, they can either visit the bookmarked site, or you can send them their link (which in step 3, you saved to their record in your CRM). This way, they can update their own info before their appointment with you.

You may also wish to store your customer's personal code in your CRM, too. Coming soon, we'll have the ability for customers to enter their personal code into your purl.

Finally, if you have an existing customer that did not save the link last year, that's ok! You can send them your purl and create a new customer record for them using all the steps described above.

### Video: Create a Quote

Here is our Quoting how-to video:



In our tool, we default to showing estimated total annual costs, i.e. as if the member began coverage on January 1st. You can change this to first of the next calendar month, or any month after that, depending on when the customer would like coverage to begin. This will help quotes match up.

For example, the screenshot below was taken in May. You can select June 1st, which is the 1st of the next calendar month, or any month after that through the end of the year.



In the beginning of your time using our tool, we understand you may cross-reference our quotes with other sites as you gain trust in our tool. If the quotes do not match up, you should make sure both sites are comparing costs over the same time frame before questioning the quote on either site.

# Why can't I see certain plans?

Always remember to begin every quote by clearing out the previous customer from active status and beginning a new session, if applicable. You'll know if this is possible if there is a personal code or someone's name displayed at the top of the page.

Click the button highlighted to clear and start a new session.



If you are still not seeing a plan that you believe you should be seeing:

- Check that you are looking in the correct zip code, and that the plan is available in that zip
- Check that you are certified for that carrier and plan type in that state
- Note that neither Special Needs nor Med Supp plans will show on purl sites
- Make sure you have selected the correct plan type radio button- See screenshot below
- DSNPs are found under Special Needs
- MA-only (no drug coverage) plans are listed separately from MAPD plans under "Medicare Advantage"

# Why can't I see certain plans? (Cont.)

3 plans found in 33010 Sort Mon	olypremium v Timeperiod Annual v D	splay: Plan costs P	lan benefits		
Plan type	Allwell Dual Medicare (HMO D-SNP)	ESTIMATED ANN	UAL COSTS	Max. out of pocket: \$3,4	100
Medicare Advantage/Part D	Alwell	Total:	SO	(in-network)	
Medicare Supplement	H5190-004-000	Health:	SO	Health deductible.	SO
Modicare Advantage     Special Needs	THE WAY S DUI OF S SIRES	Drug.	S0	Drug deductible.	\$435
	Compare / Email Quote 🛔 Find doctors	\$0.00 Monthly p	remium		i De
Filter by					
Company Aetra Inc	Preferred Medicare Assist (HMO D-	ESTIMATED ANN	UAL COSTS	Max. out-of-pocket: \$3.4	100
AIDS Healthcare Foundation	SNP) Unitedi lealthcare	Total:	50	(in-network)	
Doctors HealthCare Plans,	H1045-012-000	Health:	SO	Health deductible.	SO
Inc. Guidewell Mutual Holding Corroration	★★★★☆ 4 out of 5 stars	Drug.	S0	Drug deductible:	\$435
Humana Inc.     Longevity Health Plan	🗍 Compare / Email Quote	\$0.00 Monthly p	remium	1	E Details Envo
MMM of Florida, Inc. Molina Healthcare, Inc. Solis Health Plans	DrCare (HMO-POS C-SNP)	ESTIMATED ANN	UAL COSTS	Max_out-of-pocket_\$4,5	500 (in-network) /
United lealthcare	Doctors HealthCare Plans, Inc.	Total:	50	\$4,500 (combined)	
WellCare Health Plans, Inc.	H4140 003 000	Health:	SO	Health deductible:	SO

If the above steps do not reveal the plan you are seeking, the plan may be suppressed. We are given orders from the carriers to suppress certain non-commissionable plans. As such those plans will not appear in our tool.

With any doubts, contact your manager/internal support and let them know the:

- Carrier
- Plan/Contract/Seg ID of the plan
- The zip code you are looking in

### **D-SNP Plans and LIS Status**

Some D-SNP plans in our tool will display a premium at first. If a customer has LIS status, you need to enter it to display the correct plan premium and drug prices for your customer's specific situation.

On the census page, there is a place to enter the customer's LIS information. See screenshot below. This is information they should have that they can provide to you.



# **D-SNP Plans and LIS Status (Cont.)**

As with any quote, always remember to clear the customer from active status at the end of your session with them!



NOTE: When an LIS level is selected, the tool adjusts the plan premiums on the plan results page based on the selected LIS level. However, on the details page for that plan and on the enrollment form, the full cost of the plan is listed.

For example: Let's say full price for a plan is \$14. If 50% LIS is selected, the tool adjusts the premium to be \$7 on the plan results page (the page where all available plans are listed). The Plan Details tab and the enrollment form, however, would both still show the premium to be \$14.

Agents report that cases like this, they are told to tell the customer "Your plan premium for this plan is \$14 but based on your LIS it can be as low as \$7." That way if the customer has a different level of LIS than what they stated or loses their LIS altogether, the agent and agency will be protected.

# **Drug Dosage Not Available**

It is important to take great care in entering drugs, as there are many details to keep track of.

If the desired dosage for a drug is not displayed; click "View my medications" and ensure the drug has not already been added at the desired dosage.

If you believe we are missing a dosage, let your sales manager know.

# **MedicareLINK**

## **Scope of Appointment**

SunfireMatrix 2021Training Guide

# **Video: Scope Of Appointment**

Here is our training video on completing Scope of Appointment documents using SunFire.

Note: In the latest version of SunFire, the "Send scope" flow has been separated into "Email scope" and "Text scope" flows. The process for using either is the same as outlined in the "Send scope" section of the video above.

For help with the e-signature process, see the "eSignatures" section of our FAQ site.

# **MedicareLINK**

# User Management

SunfireMatrix 2021Training Guide

# **Changing your Username and Password - Agent**

If you are having trouble logging in, have your manager/internal support confirm the username you should use to log in.

Once you are logged in, you can change your username or password. This is also covered in our training video "Setting Up Your Agent Profile."

Begin by navigating to your profile by clicking on your name in the upper right-hand corner and clicking "profile," or by clicking the profile icon on the lower left-hand corner (see screenshot below of Profile Icon).



# **Changing your Username and Password - Agent** (Cont.)

Then click the appropriate links to change your username/password:



# **Video: Setting Up Your Agent Profile**

Here's a short training video on setting up your agent profile

To set up notifications, which is also done from your agent profile, see our posts on "Notifications"