



MedicareCENTER

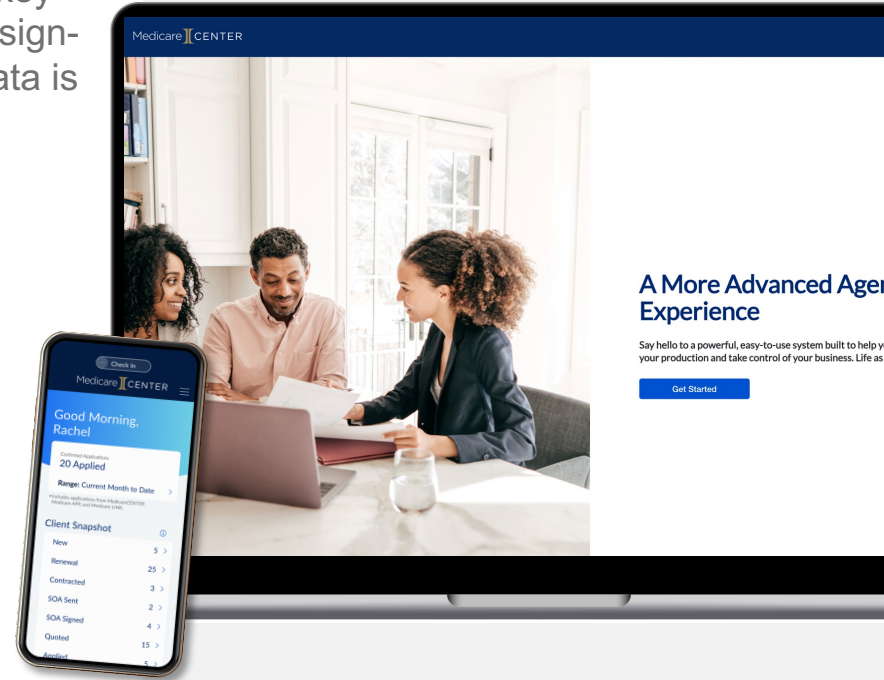
The best technology, built
by experts in the industry

Integrity's Integrated Platform:

MedicareCENTER

MedicareCENTER and the Mobile App give agents the key pieces they need to serve their clients, all from a single sign-on. With **best-in-class data security**, you know your data is secured — and all business information belongs to you.

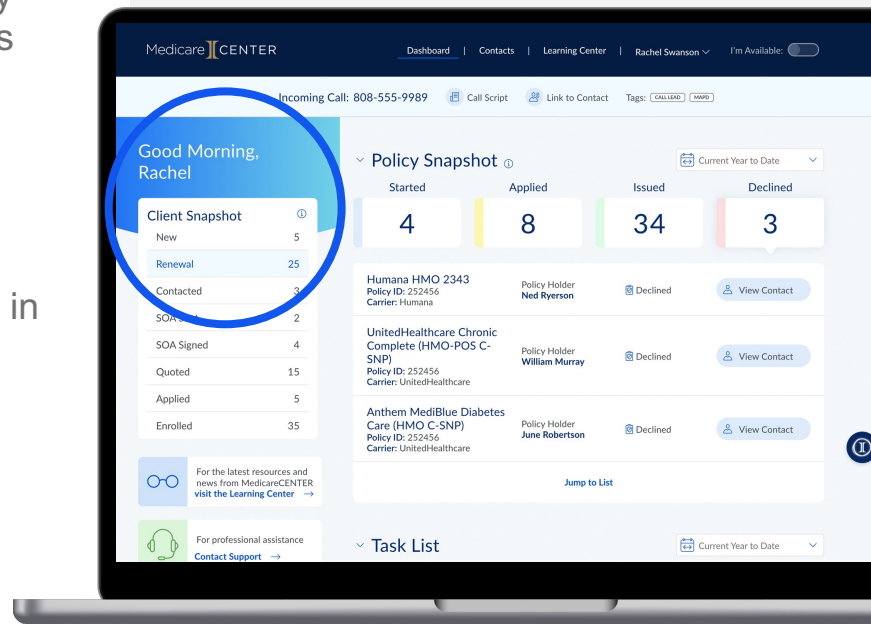
- Dashboard and Policy Management
- Contact Management and Quote and eApp
- Task Management and Activity Stream
- Agent Phone Number and Call Recording
- Personal Agent Website and Real-time Leads
- Mobile App
- New Features and Enhancements



Key features of MedicareCENTER:

Dashboard

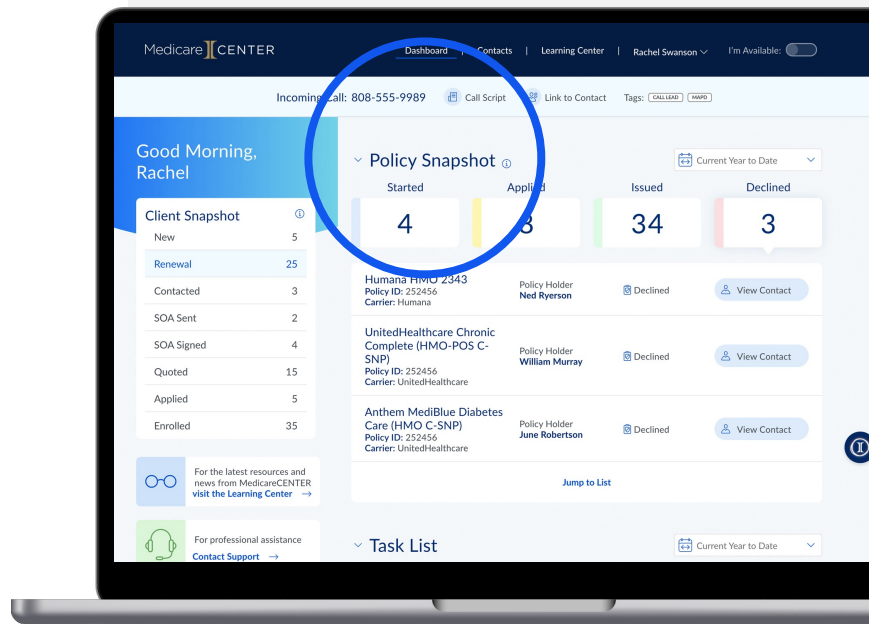
- Your MedicareCENTER Dashboard is built to quickly give you insights across your entire book of business
- Client Snapshot allows you to see a count of clients grouped by sales stage, including new, contacted, SoA sent or signed, quoted, applied and enrolled
- Click a stage to jump to the list of Contacts currently in that stage



Key features of MedicareCENTER:

Policy Management

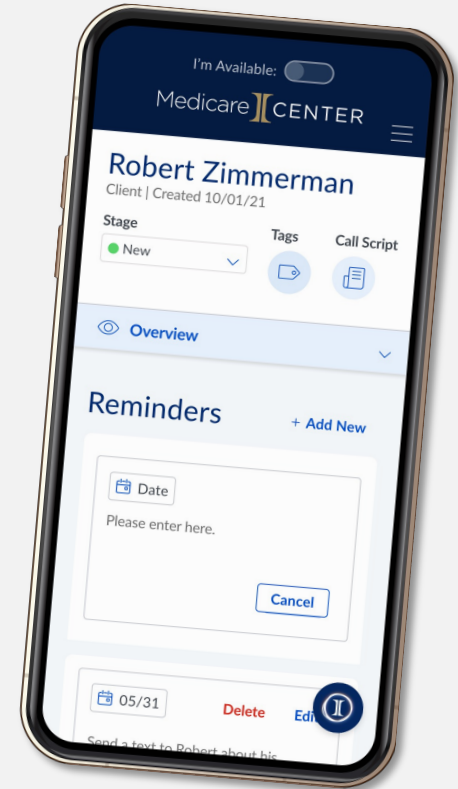
- Policy Snapshot offers an at-a-glance status view of your MA, PDP, and MAPD applications and enrollments
- The four clickable tabs — Started, Applied, Issued and Declined — allow you to see the list of policies and their associated clients
- Items on Policy Snapshot progress from Started to Applied and then to either Issued or Declined as they progress through enrollment



Key features of MedicareCENTER:

Contact Management

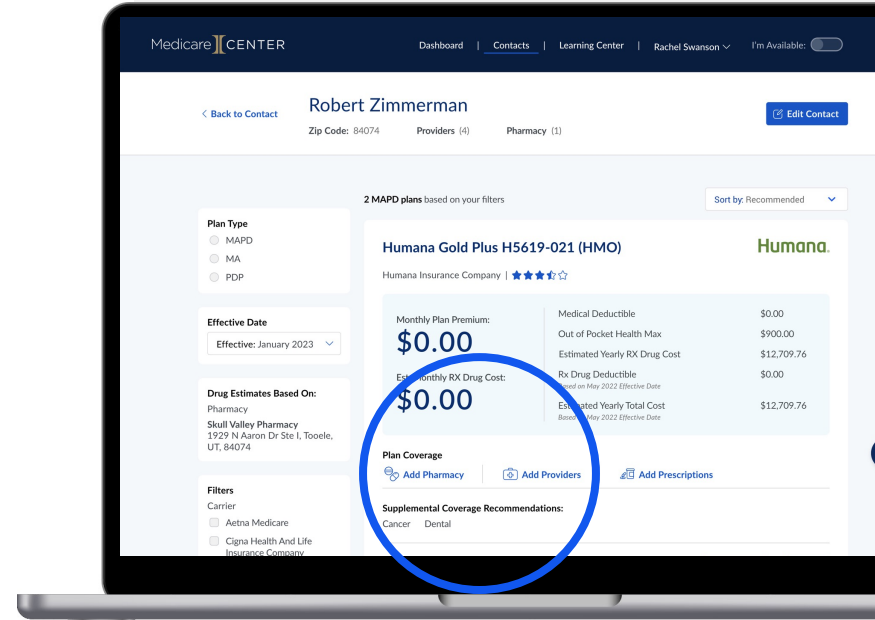
- View client plan details and view provider, prescriptions, and pharmacy information
- Contact Management Tags help you identify potential switchers, new leads and each client's product type, carrier and plan
- Automatically shows clients with active or overdue reminders at the top of the list
- See an overview with any upcoming reminders you've created for the contact
- Send and manage SoA's, including tracking the 48-hour requirement for CMS compliance



Key features of MedicareCENTER:

Quote & eApp

- Plan results are automatically filtered according to your active selling permissions
- Client providers, prescriptions, and pharmacy are easily editable from within the plans list
- For each plan in the plans list, you can see the high-level quote information, including monthly cost estimates and provider network status
- You can click “Enroll” to submit an application directly from the plans list, or select up to three plans to compare, and share with the client
- Plan Details will take you to in-depth information about a plan, including Rx quote details



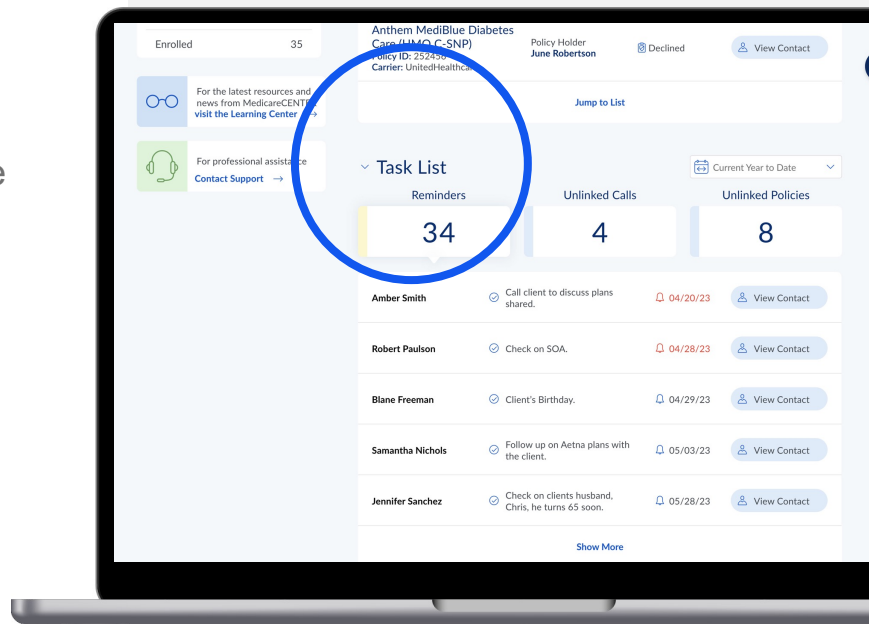
Key features of MedicareCENTER:

Task Management

Below Policy Snapshot, you'll see the Task List tabs:

- Reminders — follow-up items you have created
- Unlinked Calls — real-time lead calls that need to be linked to a contact record
- Unlinked Policies — policies in your agent account not yet linked to a client record

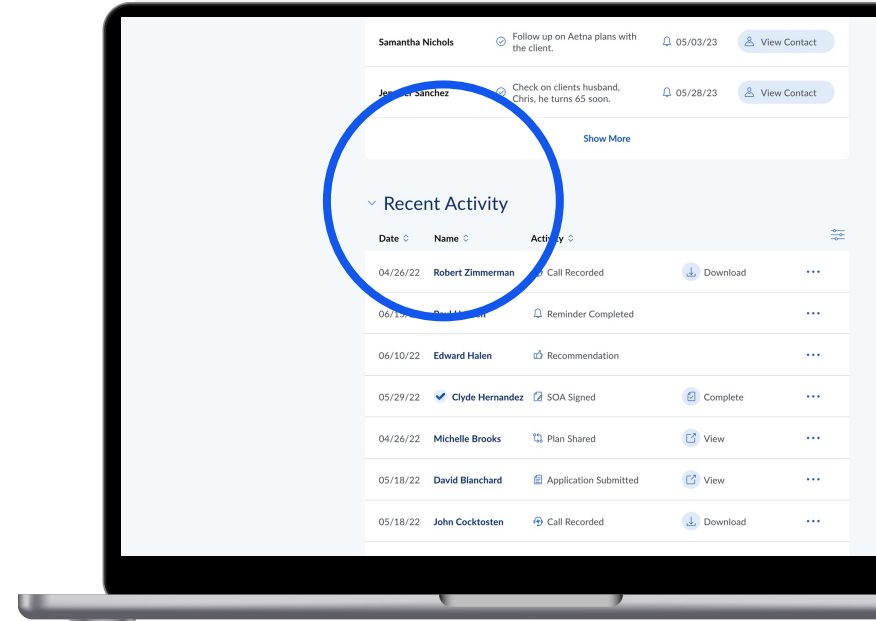
Each of the tasks on your list have an action you can take to move forward, whether that's a reminder or linking a record.



Key features of MedicareCENTER:

Activity Stream

- The Recent Activity Stream gives you an overview of your most recent client changes and communications
- This list includes client updates, task completions, call recordings, notifications for special enrollment periods, sales stage changes, and more
- The Recent Activity Stream makes it simple to assess what's happened recently for your clients and decide how to prioritize your day
- Click directly to contact records from the Dashboard, or access them from the Contacts link
- Each client has a personal Activity Stream in their Contact Record as well



MedicareCENTER:

Agent Phone Number and Call Recording

- Call Recording, powered by a unique MedicareCENTER Agent Phone Number, automatically records and stores calls to help you stay compliant
- Attaches the recordings to your contact record, and stores them for 10 years, per CMS requirements
- Call recordings are downloadable if needed

The screenshot displays the 'Account' settings page in MedicareCENTER. It is organized into four main sections:

- Personal Information:** Includes input fields for First Name (placeholder: Value), Last Name (placeholder: Swanson), National Producer Number (NPN) (placeholder: 1909744), Email (placeholder: Rachel.Swanson@ipsum.com), and Phone Number (placeholder: 801-867-5309). A blue 'Save' button is at the bottom right of this section.
- Availability Preferences:** States 'Calls to your Agent Phone Number will be forwarded to the number below.' It shows 'Forward calls to:' as 801-867-5309 with an 'Edit' link. Under 'Lead Source', there are three options: 'Health' (Setup, disabled), 'Life' (Settings, enabled), and 'MedicareEnroll' (checked, enabled).
- Agent Phone Number:** Displays the number '801-555-5685' and a 'Request a New Number' button. A note explains that this number can be given to clients for direct contact.
- Notification Preferences:** Includes 'Allow email notifications' (enabled), 'Scope of Appointment' (Get notified when a contact completes a SOA, enabled), and 'Leads' (disabled).

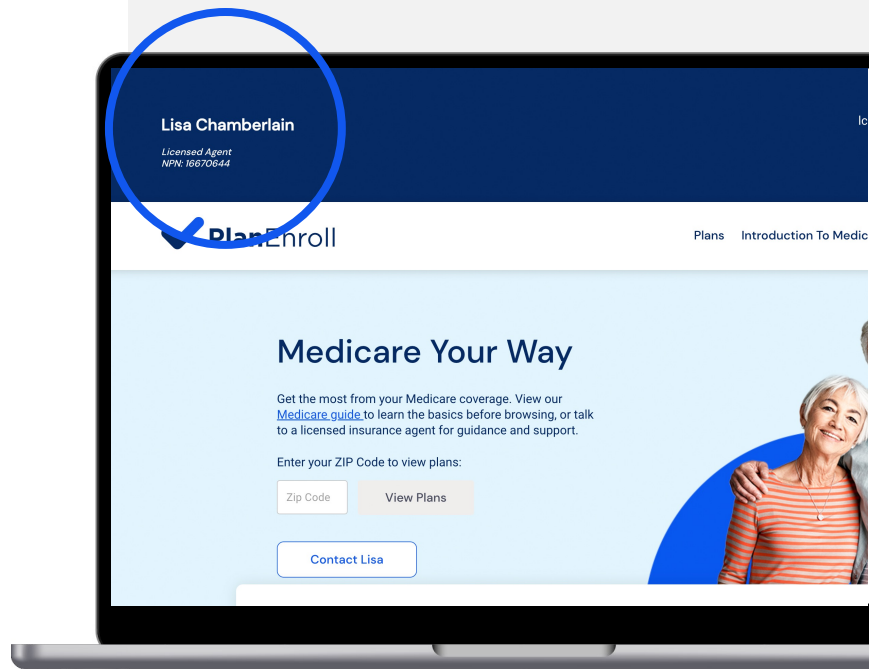
A 'Change your password' link is located at the bottom left of the page.

Key features of MedicareCENTER:

Personal Agent Website

- Your Personal Agent Website on PlanEnroll.com lets clients find, connect and shop with you online
- Client PlanEnroll profiles are connected to your Contact record in MedicareCENTER, so it's easy to stay in touch and manage provider, plan, and pharmacy updates year-round
- You get the commission for any enrollments that take place through your link

Take advantage of PlanEnroll's nationally-marketed lead generation campaigns for access to real-time and exclusive leads.



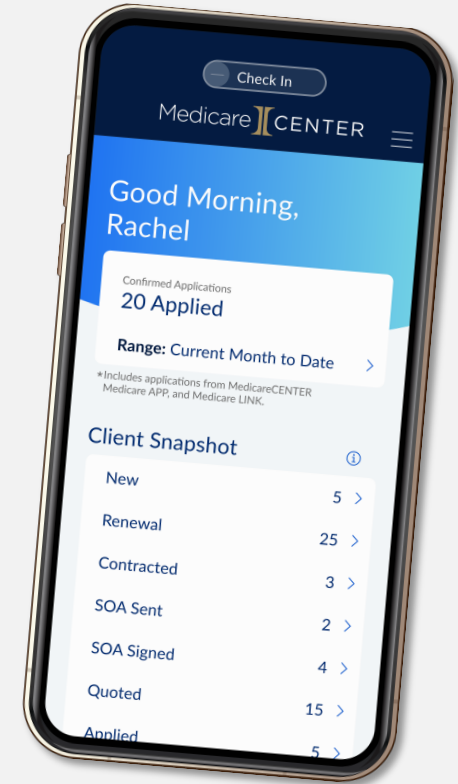
Key features of MedicareCENTER:

Mobile App

Get all the features of MedicareCENTER while on the go, through the MedicareCENTER Mobile App, including:

- Review and update information about your clients and leads
- Connect with your clients with CMS-compliant Call Recording via your dedicated MedicareCENTER Call Number
- Take notes and set reminders
- Sign up to receive real-time leads

The MedicareCENTER Mobile App is available for download on the [Apple App Store](#) and the [Google Play Store](#).

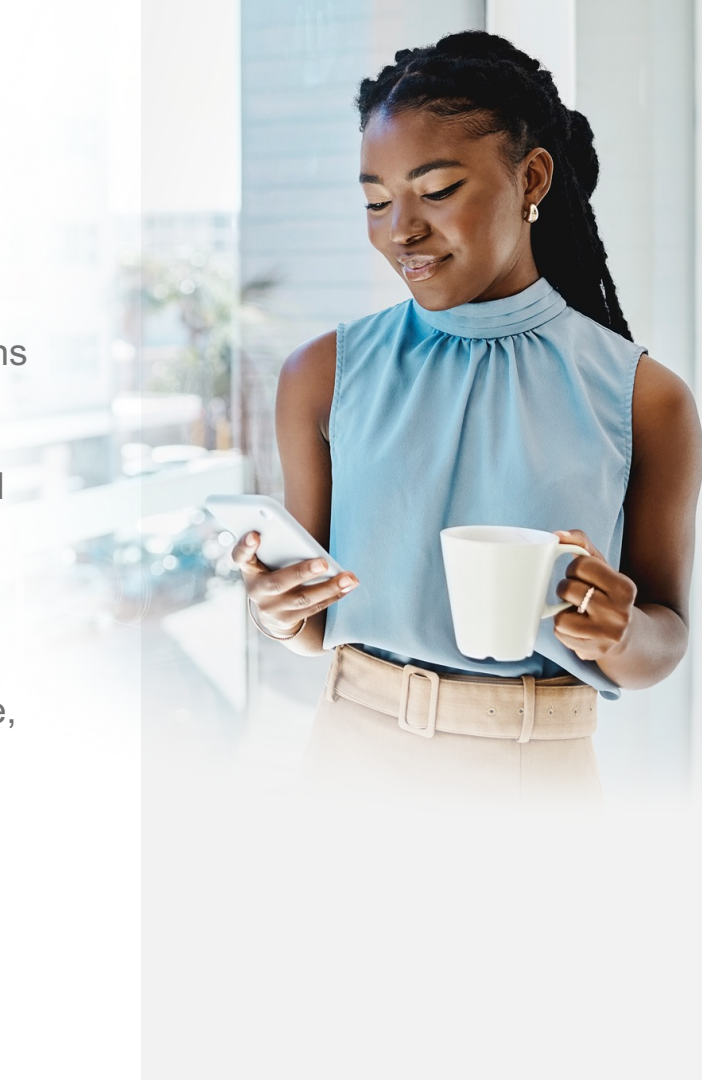


MedicareCENTER:

New Features

There are some NEW features coming to MedicareCENTER, including:

- Self-Attestation — quickly update selling permissions in additional states
- Profile Linking — leverage your PlanEnroll personal agent website to allow clients to update their own doctor, Rx, and pharmacy preferences
- SoA Compliance Assistance — easily track the 48-hour scope of appointment window when applicable, per CMS requirement



MedicareCENTER:

Enhanced Feature

Improved Rx Quote feature, including:

- Improved Rx search experience in Quote & eApp, including generic drug recommendations where available
- Improved Rx quote accuracy and usability, including drug tiers and restrictions, coverage phases, and monthly out-of-pocket cost estimates
- Improved provider search, including display and selection of multiple locations per provider where applicable



MedicareCENTER:

Conclusion

MedicareCENTER brings you these powerful features and more — all to supercharge your sales process and help you grow your business all year long.

Log in today, or for more information contact your marketer. Or reach out to support@medicarecenter.com.

