

# Selling Remotely in the Medicare Market

Your Guide to Completing  
Electronic Enrollments

\*For Agent Use Only\*  
Rev. 06/2020

*G*RABER  
&  
*A*SSOCIATES

# Special Notes

This reference guide is designed to be an all-in-one reference for electronic/remote enrollments in the Medicare market. Graber & Associates works with each carrier included in this guide. **For any contracting inquiries please contact Joe Fitzgerald at [jfitzgerald@graberassoc.com](mailto:jfitzgerald@graberassoc.com).**

**\*It is the agent/broker's responsibility to adhere to CMS, state, and carrier guidelines.\***

Graber & Associates is here to answer all of your questions. Please contact us at (605) 331-2100 if you are in need of further assistance or training. This guide and other useful resources can be found in your Graber & Associates agent portal at [graberassoc.com](http://graberassoc.com)



Click to return  
to this page



# Select a Carrier

## Medicare Supplements

- [Wellmark](#)
- [Sanford](#)
- [Mutual of Omaha](#)

## Cost Plans

- [Medica](#)

## Medicare Advantage Plans

- [Humana](#)
- [Aetna](#)

## Prescription Drug Plans

- [WellCare](#)
- [Humana](#)
- [BlueRx](#)
- [Journey](#)
- [SilverScript](#)
- [Mutual of Omaha](#)

## Extras

[Medicare Rate Sheet](#)

[Graber & Associates Contact Page](#)



## Recommended Enrollment Method

Electronic Enrollment via BlueSource accessible through [Producer Connection](#)

BlueSource can be found on your [Producer Connection](#) portal in the top right corner

**Pathway to application:** Log in to [Producer Connection](#) > BlueSource > Start Enrollment (located in the orange box titled “Enrollments”) > Select Medicare Supplement and New

BlueSource  
Instructions:



*Note: Should the broker encounter technical issues with BlueSource, contact Graber & Associates at (605)331-2100*

## Agent Resources

Resources can be found in the [Producer Connection](#)

Sales Materials can be located in the box titled: “Individual Over 65”

Forms can be found in the bottom left corner of the box titled: “Individual Over 65”





# SANFORD<sup>®</sup>

## HEALTH PLAN

Recommended Enrollment Method	Agent Resources
Complete a paper application. Submit completed application to <a href="mailto:appsandforms@graberassocinc.com">appsandforms@graberassocinc.com</a>	All available forms and additional resources are located on the <a href="#">agent portal</a>
<b>Pathway to application:</b> log into the <a href="#">agent portal</a> > Medicare > Forms > Medicare Application	After logging in with your agent credentials, click the Medicare tab to access related materials

*Note: You may also reach out to Graber & Associates for any forms or enrollment inquiries*





## Recommended Enrollment Method

Electronic Enrollment via Mutual of Omaha’s agent portal: [Sales Professional Access](#)

**Pathway to application:** Login to [Sales Professional Access](#) > You may need to scroll down to find “Sales Tools” in the left pane, select Electronic Application > Under the ‘Medicare Supplement e-Application’ title, select “Start or Continue e-App”

## Quoting Tool

**Pathway to quoting tool:** Login to [Sales Professional Access](#) > Hover mouse over Products (located in the menu bar) > Under “Medicare Solutions,” select “Sales Tools” > The “Quotes” section is the second category down, select “Online Quote” > Select “Medicare Supplement\*” > Fill in the applicable information and select “Calculate”

## Instructions

Med Supp



Quoting



## Agent Resources

Forms and Materials can be found in the Sales and Marketing tab on [Sales Professional Access](#)

**Pathway to Forms and Materials:** Log into Sales Professional Access > Hover mouse over “Sales & Marketing” > Select “Forms & Materials” > Company: Omaha Insurance Company > Service Type: select applicable choice depending on what you’re looking for > State: South Dakota > Product Type: Medicare Supplement > Product Name: Medicare Supplement – Brokerage > Select Search

## Scope of Appointment

Medica offers an easy to use electronic [Scope of Appointment](#) powered by DocuSign

### Recommended Enrollment Method

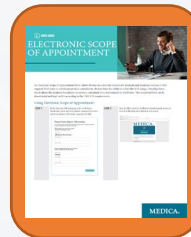
After a compliant consultation, direct the applicant to the broker-specific Personalized URL for self-enrollment.

The PURL is in the following format:  
*BrokerFirstnameLastname.medicaplanchoice.com* (ex: JaneDoe.medicaplanchoices.com)

Completed applications will appear in the Broker Client view within 7-10 days

### Instructions:

#### SOA Guide



#### App Guide



### Agent Resources

#### [Medica Agent Portal](#)

Forms and Materials can be found in the Marketing Hub: Agent Portal > For Brokers > Medicare > Marketing Hub > Search

Agents may view their Book of Business in the Broker Client View: Agent Portal > For Brokers > Medicare > Broker Client View

## Humana Sponsored Scope of Appointment

**Through Humana's Enrollment Hub sending an E-SOA via email**

Secondary option: A conference call between the broker, applicant, and Humana can be made to 866-945-4470

The agent may also consider using a platform that offers the applicant's signature to be captured via e-signature

### Recommended Enrollment Method

Send a pre-filled electronic application to the applicant for e-signature

**Pathway to the application:** [Humana Vantage](#) > For Your Retail Business > Enter **Enrollment Hub** (located in the quote and enroll section) > Enrollment Applications > Start Application

Plan documentation is required to be sent prior to the application

### Recommended Secondary Enrollment Method

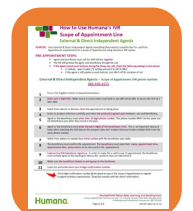
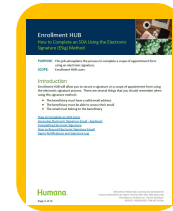
Send the applicant an all-in-one e-packet (**Digital Marketing Materials that include required plan documentation and a blank application**) for self-enrollment

**Pathway to Digital Marketing Materials:** [Humana Vantage](#) > For Your Retail Business > Digital Marketing Materials > Create New Guidebook

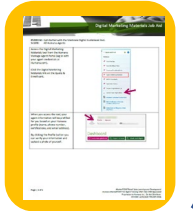
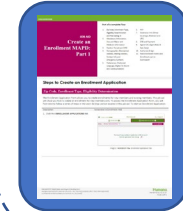
Utilizing the Digital Marketing Materials will allow the applicant to self-enroll into the agent's book of business

### Instructions Library

E-SOA GUIDE IVR GUIDE



App Guide DMM Guide





## Scope of Appointment

Electronic Scope of Appointment via the Ascend desktop application

**Pathway to SOA:** Ascend > Leads (create lead) > Create SOA

Note: An agent must “[request access](#)” to use Ascend. It can take 2-7 days to receive authorization.

## Aetna Recommended Enrollment Method

Electronic enrollment via Ascend by “Emailing a Quote”

Click on the App Guide for detailed instructions on “Emailing a Quote”

This method allows the broker to send required plan documentation, and an enrollment link for the applicant to self-enroll in the agent’s book of business

## Agent Resources

Aetna’s agent portal: [Producer World](#) > Individual Medicare

### Instructions:

#### SOA Guide



#### App Guide





# SilverScript®

There are two pathways to accessing SilverScript's agent portal. If an agent has not registered to use [SilverScript's agent portal](#) or does not remember their login information, the portal can be accessed directly within [Aetna's Producer World](#)

## Scope of Appointment

Electronic Scope of Appointment found in [SilverScript's Agent Portal](#)

**Pathway to SOA:** SilverScript Agent Portal > Enrollment > Electronic SOA

## Recommended Enrollment Method

Electronic Enrollment found in [SilverScript's Agent Portal](#)

**Pathway to application:** SilverScript Agent Portal > Hover mouse over "Enrollments" > Electronic Application

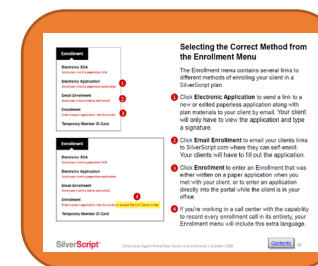
This method allows the broker to pre-fill the application and send to the applicant for an electronic signature (SilverScript sends plan documentation automatically)

## Agent Resources

Agent certification information, user guides, forms, and other helpful information can be found in the Resources tab within [SilverScript's Agent Portal](#) (Agent Portal > Resources > Reference Materials)

### Instructions:

#### SOA Guide



#### App Guide



Notice

Starting July 1<sup>st</sup> 2020, WellCare will start utilizing the desktop/mobile application Ascend for enrollments. This enrollment method will be the primary enrollment tool for the 2021 AEP. Check back regularly with G&A for updates.

**Scope of Appointment**

WellCare provides an electronic [Scope of Appointment](#) powered by DocuSign

The applicant will need the access code: **wc2020**

Completed Scope of Appointments will be emailed to the broker and client alike

**Recommended Enrollment Method**

WellCare provides an [Electronic Application](#) powered by DocuSign

The applicant will need the access code: **wc2020**

This method allows the agent/broker to prefill an application and send for e-signature via DocuSign. Plan documents are required to be sent prior.

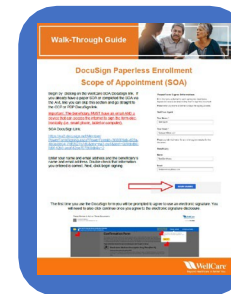
**Agent Resources**

Pre-enrollment documents can be found in the WellCare agent portal under the Enrollment Materials tab:

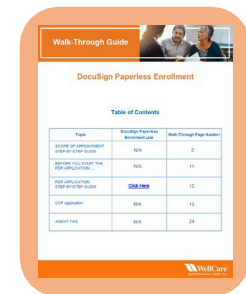
<https://wellcare.callidusinsurance.net/ICM/FormActionServlet#>

Customer service forms can be found at <https://wellcare.com/pdp>

SOA Guide



App Guide







### Scope of Appointment

Obtain a compliant Scope of Appointment

The Journey Rx sponsored SOA can be located [here](#)

### Recommended Enrollment Method

Complete [paper application](#). Submit paper application to appsandforms@graberassocinc.com

Pathway to application: go to [Journey Rx's website](#) → [Plan Documents](#) → [Enrollment application – Paper](#) ↓

→ The [2020 Digital Enrollment Guide](#) includes the [Summary of Benefits](#), [Star rating](#), and [enrollment application](#) all in one document. The 2020 Digital Enrollment Guide can be found in the Plan Document section.

### Scope of Appointment

Obtain a compliant Scope of Appointment (*BLUE RX SOA LOCATED IN FORMS SECTION OF [PRODUCER CONNECTION](#)*)

### Recommended Enrollment Method

Complete [paper application](#). Submit paper application to appsandforms@graberassocinc.com

Pathway to application: go to [Blue Rx's website](#) → [Documents](#) → [Enrollment application – Paper](#) ↓

→ The [2020 Digital Enrollment Guide](#) includes the [Summary of Benefits](#), [Star rating](#), and [enrollment application](#) all in one document. The 2020 Digital Enrollment Form can be found in the Documents section.





## Scope of Appointment

Electronic Scope of Appointment via [Sales Professional Access](#)

Pathway to SOA: Log into [Sales Professional Access](#) > Scroll down to “Sales Tools” located on the left pane > Electronic Applications > Prescription Drug Plans e-Application: Start or Continue e-App

Agent will need to complete the “Profile” section > Continue > Email SOA

## Recommended Enrollment Method

Facilitate electronic enrollment utilizing the “send access to consumer site” option located in [Sales Professional Access](#)

Pathway to application: Log into [Sales Professional Access](#) > Scroll down to “Sales Tools” located on the left pane and select “Electronic Applications” > Prescription Drug Plans e-Application: Start or Continue e-App

Agent will need to complete the “Profile” section (if not already completed) > Send access to consumer site > In pop-up: enter applicant’s email address and click send access

## Instructions

### SOA



### App





# Rate Sheet

\*Rates are subject to change\*



## SD MEDICARE SUPPLEMENT RATES (PLAN G) ALL RATES ARE PREFERRED NON-TOBACCO

WELLMARK					SANFORD SELECT		OMAHA INSURANCE COMPANY				
AGE	WITHOUT HOUSEHOLD DISCOUNT		WITH HOUSEHOLD DISCOUNT		AGE	UNISEX	AGE	WITHOUT HOUSEHOLD DISCOUNT		WITH HOUSEHOLD DISCOUNT	
	MALE	FEMALE	MALE	FEMALE				MALE	FEMALE	MALE	FEMALE
Thru 64	\$212.50	\$187.80	\$191.30	\$169.00	Thru 64	\$148.58	Thru 64	\$185.88	\$168.94	\$163.33	\$148.67
65	\$143.80	\$127.20	\$129.40	\$114.50	65	\$91.05	65	\$148.60	\$135.09	\$130.77	\$118.88
66	\$143.80	\$127.20	\$129.40	\$114.50	66	\$91.05	66	\$148.60	\$135.09	\$130.77	\$118.88
67	\$154.80	\$136.90	\$139.30	\$123.20	67	\$91.05	67	\$148.60	\$135.09	\$130.77	\$118.88
68	\$165.90	\$146.70	\$149.30	\$132.00	68	\$102.62	68	\$152.20	\$138.36	\$133.94	\$121.76
69	\$165.90	\$146.70	\$149.30	\$132.00	69	\$103.01	69	\$155.79	\$141.64	\$137.10	\$124.64
70	\$179.40	\$158.60	\$161.50	\$142.70	70	\$121.97	70	\$159.37	\$144.90	\$140.25	\$127.51
71	\$192.80	\$170.40	\$173.50	\$153.40	71	\$122.44	71	\$163.55	\$148.68	\$143.92	\$130.94
72	\$196.80	\$174.20	\$177.10	\$156.90	72	\$122.89	72	\$168.91	\$153.56	\$148.64	\$135.13
73	\$201.60	\$178.40	\$181.40	\$160.60	73	\$123.36	73	\$174.43	\$158.58	\$153.50	\$139.55
74	\$205.70	\$181.90	\$185.10	\$165.70	74	\$123.82	74	\$179.95	\$163.59	\$158.36	\$143.96
75	\$212.50	\$187.80	\$191.30	\$169.00	75	\$148.58	75	\$185.88	\$168.94	\$163.33	\$148.67
76	\$217.00	\$191.80	\$195.30	\$172.60	76	\$149.10	76	\$192.29	\$174.81	\$169.22	\$153.83
77	\$221.30	\$195.70	\$199.20	\$176.10	77	\$149.66	77	\$198.76	\$180.69	\$174.91	\$159.01
78	\$225.70	\$199.70	\$203.10	\$179.70	78	\$150.21	78	\$205.23	\$186.57	\$180.60	\$164.18
79	\$230.20	\$203.50	\$207.20	\$183.20	79	\$150.75	79	\$211.69	\$192.44	\$186.29	\$169.35
80	\$234.60	\$207.50	\$211.10	\$186.80	80	\$162.53	80	\$218.15	\$198.32	\$191.97	\$174.52
81	\$238.90	\$211.20	\$215.00	\$190.10	81	\$163.14	81	\$224.22	\$203.85	\$197.31	\$179.39
82	\$243.60	\$215.40	\$219.20	\$193.90	82	\$163.73	82	\$230.30	\$209.36	\$202.66	\$184.24
83	\$247.80	\$219.10	\$223.00	\$197.20	83	\$164.31	83	\$236.37	\$214.88	\$208.01	\$189.09
84	\$252.40	\$223.10	\$227.20	\$200.80	84	\$164.90	84	\$242.44	\$220.41	\$213.35	\$193.96
85+	\$254.70	\$225.10	\$229.20	\$202.60	85	\$167.01	85	\$246.21	\$223.83	\$216.66	\$196.97
					86	\$167.01	86	\$251.13	\$228.31	\$220.99	\$200.91
					87	\$167.01	87	\$256.16	\$232.87	\$225.42	\$204.93
					88	\$167.01	88	\$261.29	\$237.53	\$229.94	\$209.03
					89	\$167.01	89	\$266.52	\$242.29	\$234.54	\$213.22
					90+	\$167.75	90	\$271.99	\$246.72	\$238.82	\$217.11
							91	\$275.91	\$250.88	\$242.80	\$220.73
							92	\$280.51	\$255.02	\$246.85	\$224.42
							93	\$285.19	\$259.27	\$250.97	\$228.16
							94	\$289.94	\$263.58	\$255.15	\$231.95
							95	\$294.77	\$267.97	\$259.40	\$235.81
							96	\$299.68	\$272.44	\$263.72	\$239.75
							97	\$304.69	\$276.99	\$268.13	\$243.75
							98	\$309.76	\$281.60	\$272.59	\$247.81
							99+	\$314.92	\$286.29	\$277.13	\$251.94



## SD MEDICARE COST/ ADVANTAGE PLANS SAME RATE FOR ALL AGES

MEDICA	
THRIFT	\$49.00
CORE	\$79.00
PREMIER	\$189.00
THRIFT with RX	\$88.70
CORE with RX	\$125.50
PREMIER with RX	\$259.60

HUMANA	
GOLD PLUS (011) HMO	\$0.00
CHOICE MA ONLY (006) PPO	\$0.00
VALUE PLUS (171) PPO	\$30.00
VALUE PLUS (171) PPO For Full Benefit Cost/Options & Cash Engines	\$0.00
CHOICE (008) PPO	\$66.00
CHOICE (103) PPO	\$116.00

AETNA	
ELITE ADVANTRA (043) PPO	\$0.00
PREMIER ADVANTRA (001) PPO	\$0.00
PRIME (004) PPO	\$0.00



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\*RATES SUBJECT TO CHANGE\*

## 2020 MEDICARE PDP PREMIUMS SAME RATE FOR SD AND SURROUNDING STATES

HUMANA	
WALMART VALUE RX (PDP)	\$13.20
BASIC RX (PDP)	\$32.90
PREMIER RX (PDP)	\$52.80

WELLMARK/JOURNEY	
JOURNEY RX VALUE (PDP)	\$26.90
JOURNEY RX STANDARD (PDP)	\$30.20
BLUE RX STANDARD (PDP)	\$42.00
BLUE RX PREMIER (PDP)	\$69.60

AETNA/SILVERSCRIPT	
SILVERSCRIPT CHOICE (PDP)	\$33.00
SILVERSCRIPT PLUS (PDP)	\$75.30

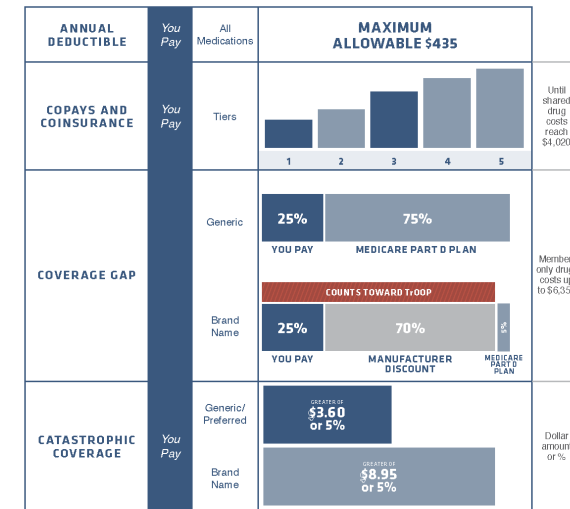
MUTUAL OF OMAHA	
FIX VALUE (PDP)	\$24.50
FIX PLUS (PDP)	\$58.70

WELLCARE	
WELLNESS RX (PDP)	\$13.80
VALUE SCRIPT (PDP)	\$16.70
MEDICARE FIX SELECT (PDP)	\$29.70
CLASSIC (PDP)	\$29.30
MEDICARE FIX SAVER (PDP)	\$34.00
MEDICARE RX VALUE PLUS (PDP)	\$72.40



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## 2020 PART D STANDARD BENEFIT



\*In the Coverage Gap, member receives a manufacturer paid 70% discount on covered brand drugs and 95% of the covered brand drug cost counts toward total out-of-pocket drug costs.

## NOTES

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# Graber & Associates Contact Information



## QUESTIONS ANSWERED

WE'RE HAPPY TO ANSWER YOUR QUESTIONS!  
SIMPLY CALL OR SEND US AN E-MAIL!

### WHERE TO SEND

**appsandforms@graberassocinc.com**  
Individual applications – under 65 & Medicare  
EFT forms – under 65 & Medicare  
Change forms – under 65 & Medicare  
Cancellations – under 65 & Medicare

**groupforms@graberassocinc.com**  
Sold group paperwork  
Employee applications  
Employee terminations  
Group/employee changes (address, household, etc.)

### WHO TO CONTACT

**Individual Health Quotes and Inquiries**  
*Under 65*  
Ashley Ahlers-Sanders | aahlers@graberassoc.com  
Chris Hanson | chanson@graberassoc.com  
Veronica Williams | vwilliams@graberassoc.com  
Ana Jones | ajones@graberassoc.com

**Individual Ancillary Quotes and Inquiries**  
*(accident, cancer, etc.)*  
Ashley Ahlers-Sanders | aahlers@graberassoc.com  
Chris Hanson | chanson@graberassoc.com

**Medicare Quotes and Inquiries**  
Preston Harris | pharris@graberassoc.com  
Ashley Ahlers-Sanders | aahlers@graberassoc.com  
Ryan Graber | rgraber@graberassoc.com  
Veronica Williams | vwilliams@graberassoc.com  
Lisa Glasgow | lglasgow@graberassoc.com

**Life, Annuity, Disability, & LTC Quotes and Inquiries**  
Tom Church | tchurch@graberassoc.com • (c) 605.929.1929  
Chris Hanson | chanson@graberassoc.com  
Kristina Graber | kgraber@graberassoc.com

**Group Health Quotes and Inquiries**  
Ana Jones | ajones@graberassoc.com  
Jose Addink | jaddink@graberassoc.com  
Veronica Williams | vwilliams@graberassoc.com

**Group Ancillary Quotes and Inquiries**  
*(life, disability, dental, etc.)*  
Jose Addink | jaddink@graberassoc.com  
Ana Jones | ajones@graberassoc.com  
Veronica Williams | vwilliams@graberassoc.com

**Licensing & Contracting**  
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Kristina Graber | kgraber@graberassoc.com

**Commissions**  
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**Marketing/Co-Op Advertising**  
Ryan Graber | rgraber@graberassoc.com

**Supplies & General Inquiries**  
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When sending an email to our office, please send to only one email address. This will allow us to process your request in the most efficient manner. Keep in mind you will receive a response that your email has been received from both appsandforms@graberassocinc.com and groupforms@graberassocinc.com.



## YOUR CONTACTS



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