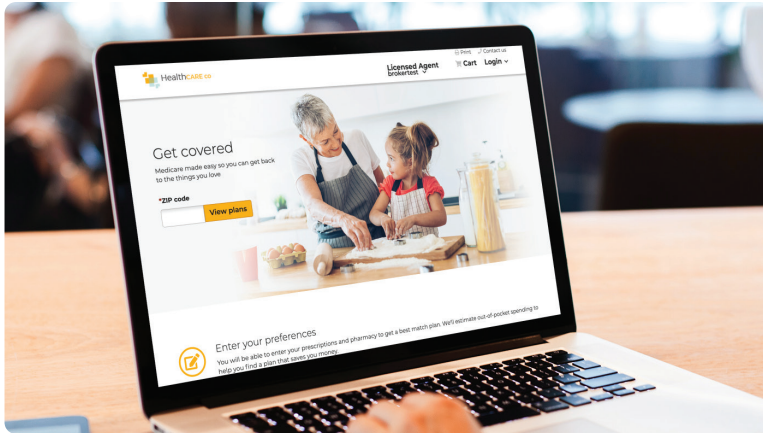**G**RABER
&
ASSOCIATES

Elevate Your Customer Experience

with Digital Medicare Shopping, Quoting, Enrollment and Retention

Transform digitally and keep your customers for life.

Platform Highlights

- **ONE place** to access carrier inventory and manage your customers

- **Shopping Link (Personalized URL) -** boost marketing efforts and consumer engagement

- **Add Preferences** (Health Status, Providers, Prescriptions, Multiple Pharmacies, and more) for a more personalized experience and accurate costs

- **Include the most accurate drug costs** based on LOCAL pharmacy pricing for **Multiple Pharmacies** (up to 3 plus mail order); **Digital Pharmacy**

- **Easy access to MyMedicare.gov for automatic upload of drug lists -** improve accuracy of personalized quotes

- **Search Providers -** easily identify those in network

- **Personalized Quoting -** Select up to three plans to send to a beneficiary via text or email

- **Text and Email to Sign SOA -** Offer more flexibility while staying compliant

- **Compare up to three plans** side-by-side

- **Display SNP plans** and filter by SNP type

- **View All Plans -** and filter by those licensed to sell

- **Medicare & Medicaid Eligibility Checks –** with REAL-TIME verification, validate each member's Medicare and Medicaid eligibility when creating a profile

- **Text and Email to Enroll** options allow you to engage beneficiaries the way they want to engage

- **Voice Signature for Scope of Appointment and Enrollment -** Collect a voice signature for both the SOA and Enrollment when working with a beneficiary on the phone

- Identify **Value-Based Care Resources** in certain areas

- **Connect on any device -** phone, tablet and laptop

800.669.3959 | www.graberassoc.com

Powered by
CONNECTURE
DRX

Multi-Year Plan View
PlanCompare ONE, PlanCompare Edge

Shop and enroll in up to two different Plan Years on one site (most recent plan year and next year). Please note that the URL for the website will not change from year-to-year, so agencies will not need to update marketing materials each year.

BENEFIT: Agents do not have to navigate to multiple sites to see individual plan years. Agents can shop and access Enrollment History and Quoting from one URL.
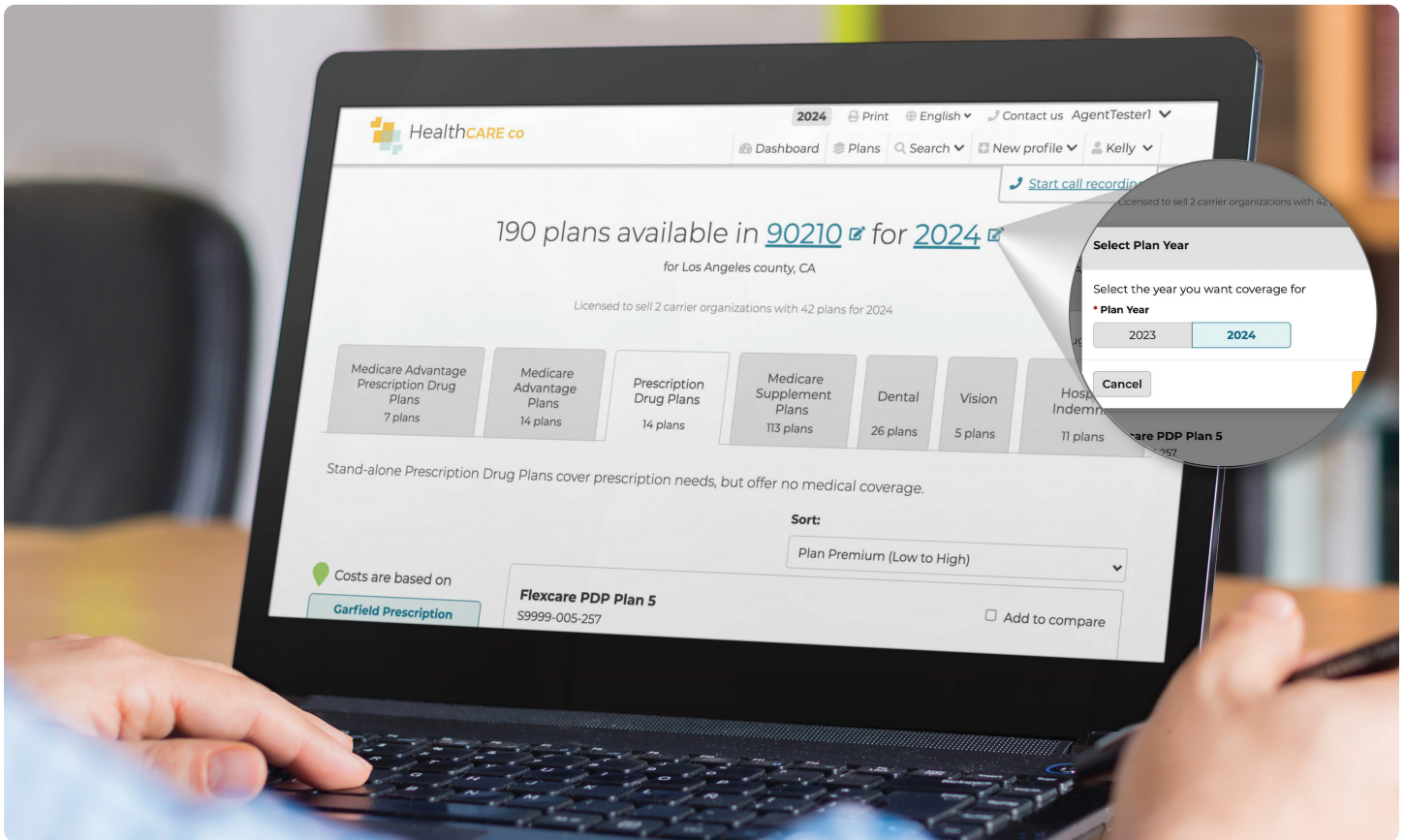
How it works:

If there are two active plan years, agents can easily toggle between the two Plan Years. The agent is directed to the most recent plan year upon initial log in.

To change the Plan Year, agents can update it from the Plan List page by clicking on the current Plan Year in session and update.

CONNECTURE DRX

Scope of Appointment

Scope of Appointment is a CMS requirement. An insurance agent must obtain a Scope of Appointment from each beneficiary to discuss only those Medicare products agreed upon in advance. Text, email or use Voice Signature to obtain a signed Scope of Appointment.

**Completing a SOA online is quick and easy:**

- Use our SOA capabilities to **stay fully compliant**
- Text, email or use Voice Signature to sign an SOA - engage your beneficiaries in the way they want to engage
- Store completed SOAs on the beneficiary profile and retrieve in the future

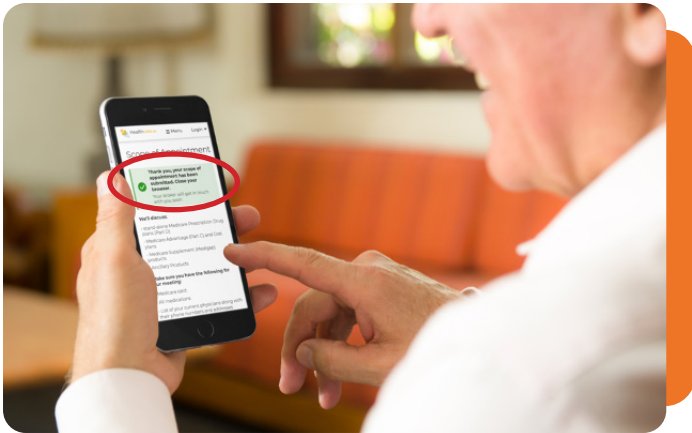## Easily connect with beneficiaries to complete a SOA
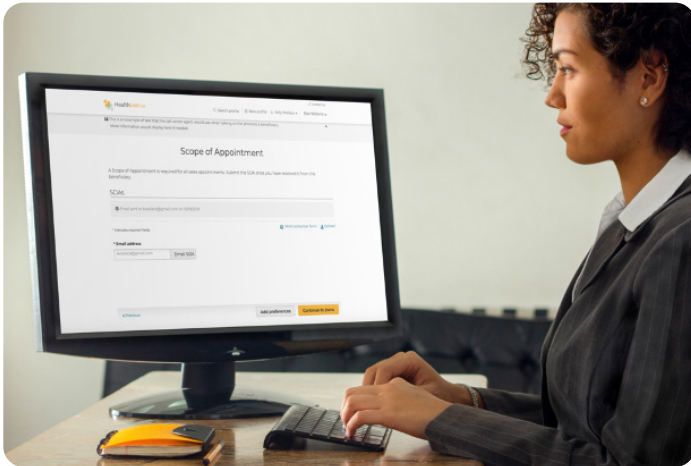
- Send text, email or use voice signature with beneficiaries via phone to complete the SOA prior to meeting.
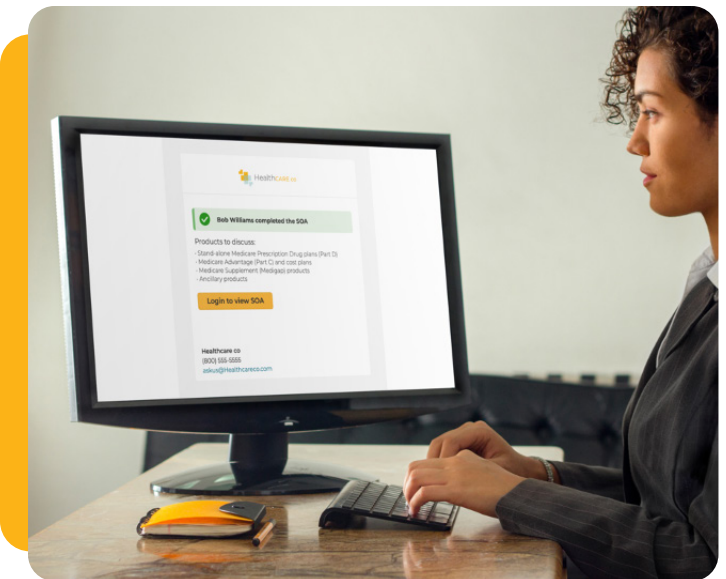
- If using **text or email,** beneficiaries will receive a request to complete the SOA on their laptop, phone or tablet.
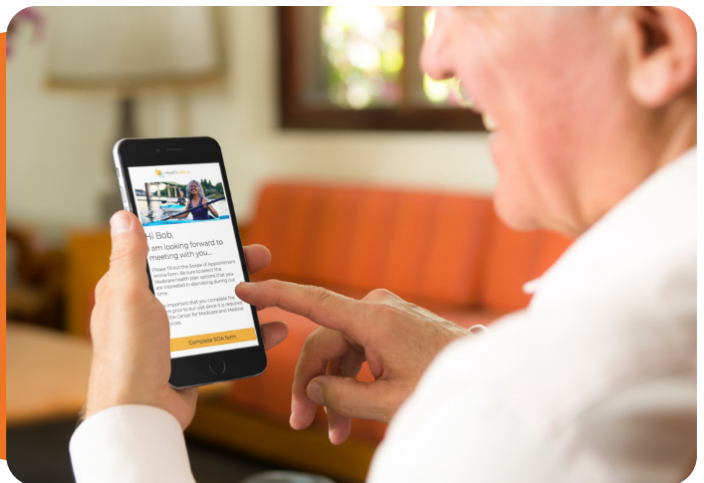
Scope of Sales Appointment Confirmation Form

The Centers for Medicare and Medicaid Services requires agents to document the scope of a marketing appointment prior to any face-to-face sales meeting to ensure understanding of what will be discussed between the agent and the Medicare beneficiary (or their authorized representative). All information provided on this form is confidential and should be completed by each person with Medicare or his/her authorized representative.
Fields marked with an asterisk (*) are required.

*Please check one or ALL the product(s) below that you want the agent to discuss.
☐ Stand-alone Medicare Prescription Drug Plans (Part D)
☐ Medicare Advantage Plans (Part C) and Cost Plans
☐ Medicare Supplement (Medigap) Products
☐ Ancillary Products
View complete Medicare product descriptions.

Beneficiary or Authorized Representative Information

By signing this form, you agree to a meeting with a sales agent to discuss the types of products you initialed above. Please note, the person who will discuss the products is either employed or contracted by a Medicare plan. They **do not** work directly for the Federal government. This individual may also be paid based on your enrollment in a plan.

Signing this form does NOT obligate you to enroll in a plan, affect your current enrollment, or enroll you in a Medicare plan.

*Beneficiary's First Name	Bob
*Beneficiary's Last Name	Williams
Address (Line 1)	
Address (Line 2)	
City	
State	Select ▾
Zip Code	
Phone Number	

Are you the authorized representative acting on behalf of the beneficiary?
Yes   No

* ☑ By checking this box, I have read and understand the contents of the Scope of Appointment form, and that I confirm that the information I have provided is accurate. If submitted by an

- They will check off the products they want to discuss, such as Medicare Advantage plans, Medicare Supplement plans and ancillary products, among others.

- Beneficiaries will see their SOA has been submitted.

- Agent will receive notification of the completed SOA and can log on to view details of the SOA.

Scope of Sales Appointment Form (To Be Completed by Agent)

Scope of Appointment form needs to be completed and submitted for all scheduled appointments (even for no-shows, cancelled appointments, or those that do not result in a sale).

*Agent First Name

Betty

*Agent Last Name

Broker

Agent Phone

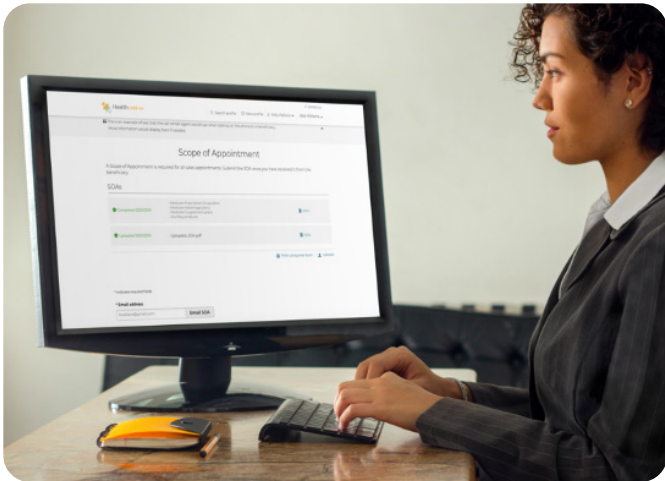*Please enter your 10 digit phone number with no hyphen or spaces (e.g., 2125551212).*

*Initial Method of Contact

If the SOA form was signed by the beneficiary at time of appointment, provide explanation why SOA was not documented prior to the meeting.

*Plan(s) represented during this meeting:
☐ Medicare Prescription Drug Plans
☐ Medicare Advantage Plans

- Agent will see those products beneficiaries want to discuss, along with any updates.

- Agent also fills out their portion of the SOA form.

- After the agent completes the SOA, the process is finished. The agent can begin to enroll the customer in their best fit Medicare plan.

Powered by
CONNECTURE *DRX*

Contact Us

connecture.com | marketing@connecture.com | 800.379.9060

Voice Signature for Scope of Appointment and Enrollment

Voice signature communicates important information and disclosures when collecting a Scope of Appointment (SOA) and completing enrollments during the call recording process.

Beneficiaries will be required to verbally give their consent to discuss plans (SOA), affirm their understanding of benefits and disclosures prior to beginning an enrollment, and provide their verbal consent with a voice signature when completing an enrollment.

Professional users may use the ConnectureDRX call recording solution or their own recording system using this feature.
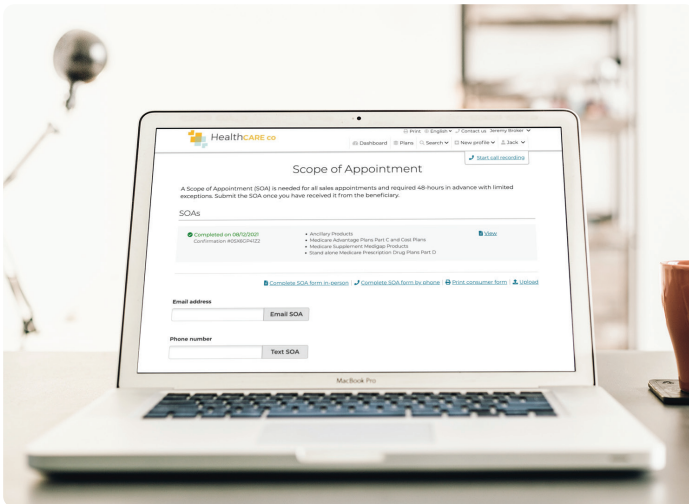


1. Scope of Appointment by phone – When selecting this option, additional disclaimers/statements will appear on the SOA form. Per CMS guidelines, each statement must be read to the beneficiary by the agent.

   Note: The original SOA form (without agent statements) will be sent to the beneficiary or presented to the agent when selecting any of the following options: Email SOA, Text SOA or Complete SOA form in-person.

2. Pre-enrollment Statements – This appears on the first page of enrollment and contains a review of plan benefits along with a list of disclaimers/statements.

   Each benefit and statement must be checked as read to the beneficiary.

   Note: The Pre-enrollment Statements will only appear if agents complete enrollments themselves. If the agent is sending the enrollment to the beneficiary, these statements will not be visible.
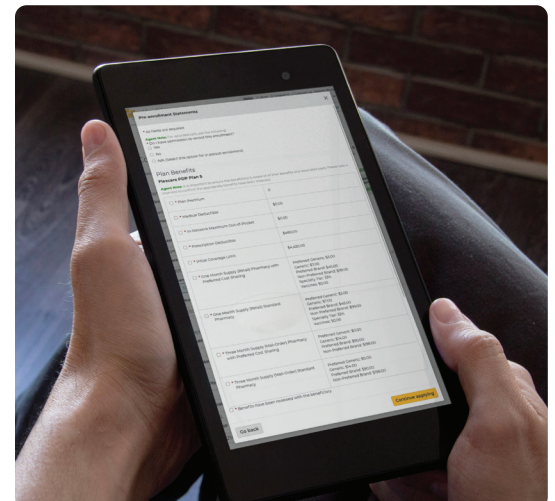
3. **Voice Signature** – When an agent clicks Voice Signature, a list of statements will appear that must be read to the beneficiary.

Note: The Voice Signature option will only be available if the agent is completing the enrollment themselves. The Continue to voice signature button will NOT be available if the agent is sending the enrollment to the beneficiary.

Enrollment

Submit page

Agent Signature

*Sign your name below using a stylus, mouse, or your finger.

clear

Jeremy Broker

PRIVACY ACT STATEMENT

The Centers for Medicare & Medicaid Services (CMS) collects information from Medicare plans to track beneficiary enrollment in Medicare Advantage (MA) or Prescription Drug Plans (PDP), improve care, and for the payment of Medicare benefits. Sections 1851 and 1860D-1 of the Social Security Act and 42 CFR §§ 422.50, 422.60, 423.30 and 423.32 authorize the collection of this information. CMS may use, disclose and exchange enrollment data from Medicare beneficiaries as specified in the System of Records Notice (SORN) "Medicare Advantage Prescription Drug (MARx)", System No. 09-70-0588. Your response to this form is voluntary. However, failure to respond may affect enrollment in the plan.

‹ Previous   Continue to voice signature   Submit

Voice Signature

The benefits for agents:

• Assists agents in communicating important information, benefits and disclaimers to beneficiaries when collecting Scope of Appointments and completing enrollments.
• Allows users to review Pre-enrollment Statements and collect a Voice Signature whether they are enrolling beneficiaries over the phone or in person.
• Indicates when Pre-enrollment Statements and Voice Signatures have been collected.