

# Medicare Edge

User Guide



PLAN YEAR 2022

## **ConnectureDRX Documentation**

This document is subject to change without notice. The information contained in this document may not reflect the final design in some instances.

This publication contains proprietary information of Connecture, Inc. No part of this publication may be reproduced, stored in a retrieval system, or transmitted to any 3rd party, in any form by any means (electronic, mechanical, photocopying, recording, or otherwise) without the prior written permission of Connecture, Inc.

This documentation is subject to restricted rights per the ConnectureDRX software license agreement.

ConnectureDRX and the ConnectureDRX logo are registered trademarks of Connecture, Inc. All other registered trademarks, trademarks, and service marks are the property of their respective holders.

### **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.

### **Headquarters**

1433 N Water Street, Suite 400  
Milwaukee, WI 53202

### **Copyright**

© 2021 Connecture, Inc. All rights reserved. ConnectureDRX, the ConnectureDRX logo, and all other ConnectureDRX product, service Medicare Edge and logos are registered trademarks or trademarks of Connecture, Inc. in the USA and other countries.

## Table of Contents

### Contents

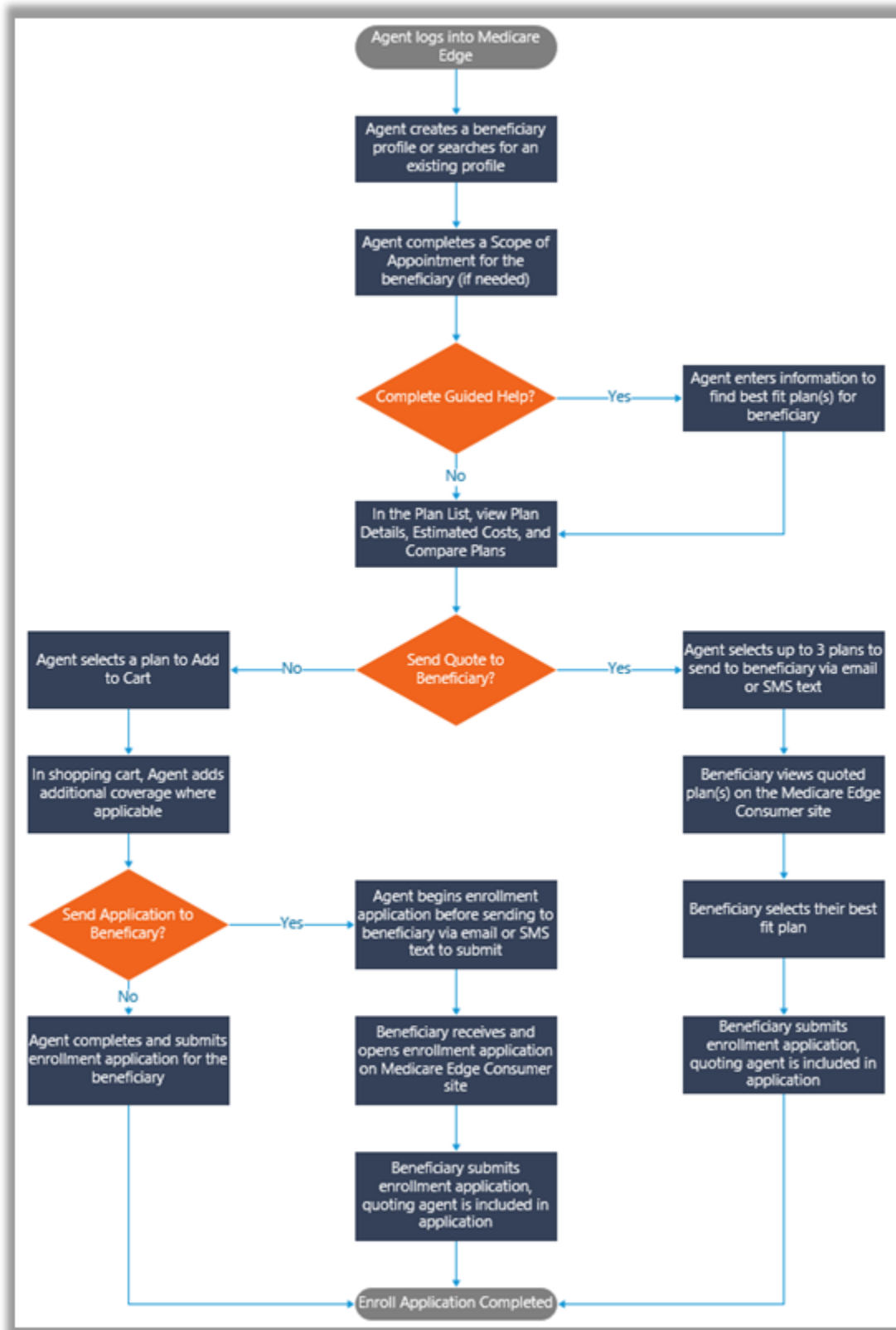
Introduction.....	2
Medicare Edge Site Workflow .....	3
Dashboard .....	4
Beneficiary Profile.....	5
Scope of Appointment (SOA).....	6
Add Preferences/Guided Help .....	7
Shopping .....	8
Plan List.....	8
Send a Personalized Quote.....	9
Shopping Cart/Enrollment Application .....	10
Health Risk Assessment (HRA) .....	11
Reporting.....	12
Provider, Drug, and Pharmacy finder.....	13

## Introduction

Medicare Edge provides the following benefits:

- A streamlined shopping workflow for viewing, comparing, and quoting available plans
- Beneficiary profiles that securely save information and keep track of enrollment progress and history year over year
- A consultation workflow that allows you to input preference information to display estimated costs and guide you to the best fit plan for the beneficiary you are working with
- Electronic Scope of Appointment
- Provider, drug, and pharmacy finding tools that display provider network status, drug and pharmacy coverage information

## Medicare Edge Site Workflow



## Dashboard

Upon logging in, you will land on the dashboard. Here you can view your open tasks, a link to training materials, and a link to access reports.

The screenshot shows a dashboard titled "Dashboard" with two main navigation buttons: "Reports" and "Agent training materials". Below these are five expandable sections, each with a list of tasks. Each task includes a checkbox, a description, a due date, and a link to the responsible agent.

Section	Task	Due Date	Agent
Enrollments	<input type="checkbox"/> Follow up on Application for flexcare MAPD plan 2	Due 07/21/2021	<a href="#">Kirk Douglas</a>
Quotes	<input type="checkbox"/> Follow up on quote	Due 07/21/2021	<a href="#">Jane Doe</a>
Scope of Appointment	<input type="checkbox"/> Follow up on Scope of Appointment	Due 07/21/2021	<a href="#">Jane Doe</a>
MyMedicare.gov connections	<input type="checkbox"/> Follow up on MyMedicare.gov invitation	Due 07/21/2021	<a href="#">Kirk Douglas</a>
Other	<input type="checkbox"/> Call Mark to schedule appointment	Due 07/22/2021	<a href="#">Mark Hamill</a>
	<input type="checkbox"/> Send Mark SOA by text message	Due 07/23/2021	<a href="#">Mark Hamill</a>
	<input type="checkbox"/> Confirm appointment time for next week	Due 07/24/2021	<a href="#">Jane Doe</a>
	<input type="checkbox"/> Call Kirk to schedule appointment	Due 07/24/2021	<a href="#">Kirk Douglas</a>
	<input type="checkbox"/> Wish Kirk a happy birthday!	Due 07/30/2021	<a href="#">Kirk Douglas</a>

## Beneficiary Profile

When you are working with a new beneficiary, it is important to create a new profile to save their data. To access profile information in the future, you can search for the profile, or click the profile name from the dashboard when there are open associated tasks.

**Note:** if your site is integrated with AgencyBloc – the profile details will be automatically created/updated.

### Profile

#### Personal information

**\*ZIP code**

<b>* First name</b> <input type="text"/>	<b>* Last name</b> <input type="text"/>	<b>Date of birth</b> <input type="text" value="MM/DD/YYYY"/>
<b>Email address</b> <input type="text"/>	<b>Phone number</b> <input type="text"/>	

#### Home address

<b>Address 1</b> <input type="text"/>	<b>Address 2</b> <input type="text"/>
<b>City</b> <input type="text"/>	<b>State</b> <input type="text" value=""/>

#### Sales information

**Is the sales contact different from the beneficiary?**

<input type="button" value="Yes"/>	<input type="button" value="No"/>
------------------------------------	-----------------------------------

#### Notes

You have no notes for this profile

---

#### Tasks

You have no tasks for this profile

## Scope of Appointment (SOA)

Sending and managing scopes is easy within Medicare Edge. You can send an electronic SOA via email and/or text to the beneficiary. Once the beneficiary completes the SOA, you will receive an email for you to complete the form. If you need a pdf version of the SOA for your records outside of the system, you can download a PDF version of a completed SOA from within the beneficiary profile. You also have the option to complete a paper SOA and upload the document within the beneficiary's profile.

### 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

<input checked="" type="checkbox"/> Completed 08/16/2021 Confirmation #3534U8QTBD	<ul style="list-style-type: none"><li>Stand alone Medicare Prescription Drug Plans Part D</li></ul>	<a href="#">View</a>
<input checked="" type="checkbox"/> Completed by Jane Doe on 08/16/2021	<ul style="list-style-type: none"><li>Medicare Supplement, Medigap Products</li></ul>	<a href="#">Complete form</a>

[Print consumer form](#) | [Upload](#)

**Email address**

[Email SOA](#)

**Phone number**

[Text SOA](#)

[Previous](#) [Add preferences](#) [Continue to plans](#)

## Add Preferences/Guided Help

Entering information in the guided help workflow will help generate estimated out of pocket costs per plan for the beneficiary and highlight the beneficiary's best fit plan. Each step in the guided help workflow is optional, but as more information is entered the system estimates costs based on that information.

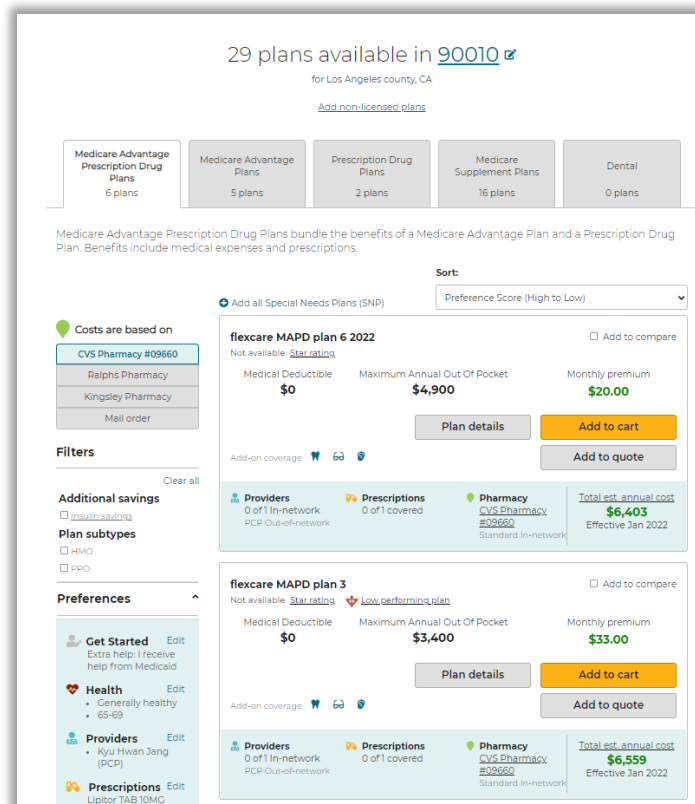
1. Get Started – enter the beneficiary's ZIP code, desired coverage type, and subsidy information\*
  - \*Providing the beneficiary's subsidy information allows the system to adjust premiums, drug deductible and drug copays in the plan cost estimates.
2. Health – enter general health information about the beneficiary to estimate health costs
3. Providers – add the beneficiary's providers and indicate which is the primary care provider to see if these providers are in-network when reviewing plans
4. Prescriptions – add each of the beneficiary's prescriptions
  - If the beneficiary has a MyMedicare.gov account, you can ask if they would like to allow you to connect to import their claims data and pre-populate drug information into their list of drugs.
  - Please refer to the separate **AEP 2022 - Building a Medicine Cabinet with MyMedicare.gov** document within agent training for additional details on this functionality
5. Pharmacy – add up to three pharmacies to view drug costs at those pharmacies
6. Other Preferences - answer questions about plan benefits that are important to the beneficiary



## Shopping

### Plan List

The Plan List page displays all plans that are available in the beneficiary’s coverage area. Upon clicking on the Medicare Supplement plan type, additional rating questions are shown to display available plans and rates.



From this page you can easily:

- View plan details for any plan
- Toggle to change estimated costs by selected pharmacy or mail order
- Filter based on important criteria
- Select up to three plans to view a side-by-side comparison
- Select up to three plans to include in a personalized quote to send to the beneficiary
- Add a plan to the cart to start the enrollment process

## Send a Personalized Quote

You can send a personalized quote via email or text message and add a customized message to accompany the quote. The system will send out two notifications to the beneficiary—one with a system generated link and the other with a unique access code. Using these, the beneficiary can review the plan details and submit their own enrollments online. You will receive credit for these enrollments and will receive an email notification upon application submission.

**Send quote** X

Send quote to Jane Doe

How would the beneficiary like to receive the quote information?

Email **\* Email address**

Text **\* Phone number**

**Additional message**  
This will show when the user logs back into the site.

Please review this quote at your earliest convenience.  
Let me know if you have any questions.

**Pharmacy**  
View costs based on one or multiple pharmacies.

CVS Pharmacy #09660

Ralphs Pharmacy

Kingsley Pharmacy

Cancel Send quote

## Shopping Cart/Enrollment Application

When you are ready to start an enrollment, you will add the plan to the cart. From the cart you can add any available optional supplemental benefits, send the application to the beneficiary to complete, or complete it yourself.

The screenshot shows a 'Cart' page for a Medicare Advantage Prescription Drug Plan. The main plan is 'flexcare MAPD plan 6 2022' with a monthly premium of \$20.00. Below this, there are sections for 'Optional add-on coverage' including 'Dental' (\$15.00), 'Hearing' (\$5.00), 'Vision' (\$10.00), and a 'Dental, Vision, and Hearing package' (\$25.00). At the bottom, there are two buttons for completing the form: 'Send to beneficiary to sign and submit' and 'Complete and submit form myself'. A green bar at the bottom right indicates the 'Total monthly premium' is \$20.00.

Item	Price	Action
Medicare Advantage Prescription Drug Plan (flexcare MAPD plan 6 2022)	Monthly premium \$20.00	View details   Change plan   Remove plan
<b>Optional add-on coverage</b>		
<b>Dental</b>		
Flexcare Dental	\$15.00	View details   Add
<b>Hearing</b>		
Flexcare Hearing	\$5.00	View details   Add
<b>Vision</b>		
Flexcare Vision	\$10.00	View details   Add
<b>Dental, Vision, and Hearing package</b>		
Flexcare Combined	\$25.00	View details   Add

\* How will you be completing this form?

**Total monthly premium \$20.00**

If you send the application to the beneficiary to complete, you will fill out all required information for the beneficiary. On the last page of the enrollment form, you will choose to send the application via email or text. The system will send out two notifications to the beneficiary – one with a system generated link and the other with a unique access code. Using these, the beneficiary can review the application, and sign and submit the application. You will receive a notification upon application submission.

**Note:** If a plan is not available for consumer direct enrollment, you will see a warning banner at the top of the page.

## Health Risk Assessment (HRA)

For plans that offer a Health Risk Assessment (HRA), after submitting the enrollment you will see the option to complete the HRA on the Enrollment confirmation page. You will be redirected to the HRA or HRA system, depending on the carrier's requirements.

**Note:** The opportunity to complete the HRA will no longer be available after you navigate away from the Enrollment Confirmation page.

**Application submitted**

1 Your application has been submitted and is pending approval. This confirmation is not proof of membership.

Email Print

**What to expect**

- You will be notified when your application is accepted and your coverage is effective.
- You should receive your insurance card within 7 to 10 business days.
- If you have an email address on file, we will send copy of your application submission.

**Next steps**

To better serve the needs of our beneficiaries, please complete the optional Health Risk Assessment.

[Complete Health Risk Assessment](#)

**Application details**

**Member name**  
Tom Smith

**Member address**  
2345 N. Main St Apt 2 Los Angeles, CA 90010

**Submitted on**  
July 1, 2021

**Confirmation number**  
A91322260562880M

[View application](#)

**ACME**  
1234 Any Street Any City, CA 90010  
Monday-Friday, 8:00am-6:00pm PST  
(800) 123-4567 TTY 111  
<https://www.connecture.com>

**Medicare Advantage Plan**

TEST - MA PLAN THREE

Monthly premium **\$99.00**

**Total monthly premium \$99.00**

## Reporting

Reports can be used to return beneficiary profiles that you have submitted an enrollment application, HRA or scope of appointment (SOA) during a given period.

Search criteria includes:

- Submitted date range – up to a 7-day period
- Type – the type of submission that you will be searching for:
  - Enrollment – completed enrollment applications in the submitted date range
  - HRA – completed health risk assessment applications in the submitted date range
  - SOA – completed scope of appointments in the submitted date range
- Enrollment type – only applies to the Enrollment report type
  - Medicare – completed Medicare applications in the submitted date range
  - Medicare Supplement – completed Medicare Supplement applications in the submitted date range
  - Ancillary – completed Ancillary applications in the submitted date range

Once you have input the report criteria, click *Run Report*. The results will include all the beneficiary profiles that meet the criteria entered. Report results can be downloaded as a csv file.

### Reports

**\* Submitted date range**

From  To

Date range must be 7 days or less.

**\* Type**

▼

**\* Enrollment type**

▼

[Download results](#)

**Sort**

▼

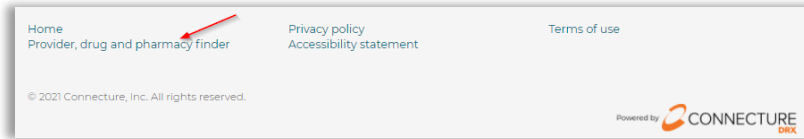
**Filters** ▼

<p><a href="#">Jane Doe</a> 123 Test St Apt 2 Los Angeles, CA 94904</p>	<p>beneficiary@connecture.com (212) 555-1212</p>	<p><span style="color: green;">●</span> Applicant</p>	<p>Bill Broker billbroker</p>	<p>Updated 08/23/2021</p>
---	--	---	-----------------------------------	---------------------------

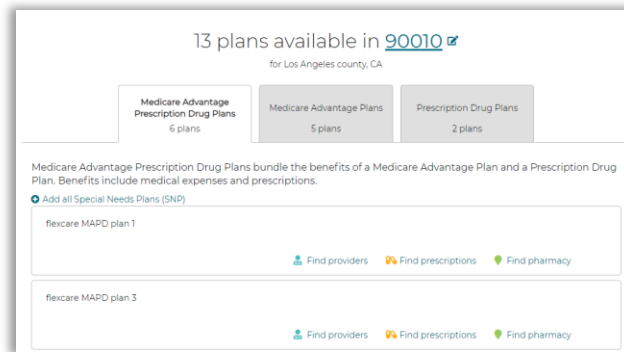
## Provider, Drug, and Pharmacy finder

The Provider, Drug, and Pharmacy finder feature allows you to search for covered drugs, pharmacies, and providers for a specific plan outside of the shopping and comparison process.

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



Then you will select a specific plan to review within a given service area. Available plans are divided into tabs by plan type.



Once a plan is selected, you can toggle between providers, prescriptions and pharmacy to view in-network pharmacies/providers or prescription coverage.

