

Enrollment 101

There are multiple ways to enroll a beneficiary. Here are the best ways to use each enrollment function:



Shopping URL

- You are remote; communicating by phone or email
- Your beneficiary prefers to shop on their own
- Your beneficiary has access to the web



Start a Consultation

- You are remote or in person
- You are working with a new prospect
- You need to provide this prospect with a personalized quote; utilization, Rx, etc.



Quick Quote

- You are remote; communicating by phone or email
- Your beneficiary has an email address
- You have gone over the plan with your beneficiary, and they don't need to see an in-depth quote



Start a New Enrollment

- You are in person
- Your beneficiary already knows the plan they want
- You are keying in a paper application

Enrollment 101



Shopping URL

Under “My Account” you will find your very own shopping URL to distribute to your beneficiaries. This URL is specific to you, with your contact information. Your beneficiaries can then shop and enroll in the plans you are licensed to sell. You are automatically tagged on every enrollment that happens through your URL for crediting.



Start a Consultation

This function will allow you to create a profile for your beneficiary to be saved within your book of business. You will be prompted to collect information such as age range, health status, subsidy (if applicable) and Rx. Upon entering this information the tool will provide you with a personalized quote and a total out of pocket cost estimation. You will then have the ability to send the personalized quote with the option for your beneficiary to do a self-service enrollment, or move to the electronic enrollment form and submit an application.



Quick Quote

This function will allow you to send plan information to multiple beneficiaries via email, with the option for self-service enrollment. This is a fast path option for those who do not need a personalized projection of costs.



Start a New Enrollment

This is a fast path option which allows you to pull up the electronic enrollment form for a chosen plan without having to go through a consultation.