



AEP 2023 Broker Training

Job Aid & Resources

Health Partners Plans



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SEARCH FOR A BENEFICIARY

Search Profiles

When you log into the Connecture platform, your screen will automatically default to the Dashboard view.

Use the Search Profiles button to see if a lead has an existing profile before entering a new one. Access the Search Beneficiary screen by following the steps below.

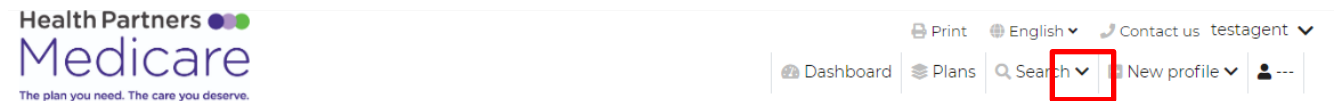
1. Go to the top right side of the screen



Search beneficiaries

First name	Last name	Date of birth	Phone number
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

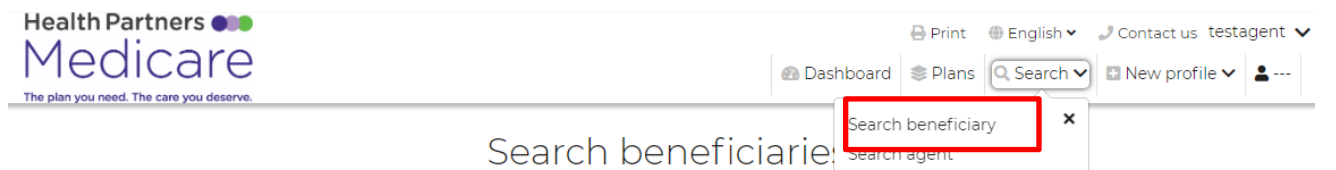
2. Click on the drop down next to the Search button



Search beneficiaries

First name	Last name	Date of birth	Phone number
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

3. Select Search Beneficiary



First name	Last name	Date of birth	Phone number
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

4. Start searching for the individual by entering their information in the blank fields. The more search criteria you enter, the more specific your results will be.

Health Partners Medicare
The plan you need. The care you deserve.

Print English Contact us testagent

Dashboard Plans Search New profile

Search beneficiaries

First name: Sue

Last name: Smith

Date of birth: 02/25/1976

Phone number: (610) 631-5044

Email address: sue.smith@gmail.com

Confirmation number:

MBI:

Agent username:

*****If you are unsure if the person you are speaking to has a profile built in Connecture, it is best practice to search. If you search for someone and enter their First and Last name, Date of Birth, Phone Number, and email Address, and no results are found you can create a profile from the information you entered. This will save you time since you are not rekeying information you already entered.***

5. If the individual that you are searching for does NOT have an existing profile, you will see the below message. You can proceed to create a new profile.

Health Partners Medicare
The plan you need. The care you deserve.

Print English Contact us testagent

Dashboard Plans Search New profile

Search beneficiaries

There are no results for the profile you searched, but you may create a new profile with that information.

[Create a new profile](#)

or [search again](#)

6. If the individual that you are searching for does have an existing profile, you will see the below message. You can proceed by clicking on their name to view their profile and access the application's details:



[Print](#)
[English](#)
[Contact us](#)
[testagent](#)

[Dashboard](#)
[Plans](#)
[Search](#)
[New profile](#)
[User profile](#)

Search beneficiaries

A registrant is a new beneficiary who has not started the process for an enrollment application. An applicant has started their enrollment application. Completing a Scope of Appointment does not impact a beneficiary's status.

Search results

[Download results](#)

Sort

Last name

John Smith 5020 Tulip St Philadelphia , PA 19124	(484) 000-0000	● Applicant	testagent testagent CNX_testagent	Updated 10/13/2022
Lois Smith 5020 Tulip St Philadelphia , PA 19124	(484) 000-0000	● Applicant	testagent testagent CNX_testagent	Updated 09/09/2022

Profile Page

Profile

Start call recording

Personal information

***ZIP code**

19124

County
Philadelphia, PA

*** First name**

John

*** Last name**

Smith

Date of birth

01/12/1957

Email address

Phone number

(484) 000-0000

MBI

.....

[Show](#)

Hospital (Part A) effective date

Month

Year

Medical (Part B) effective date

Month

Year

Home address

Address 1

5020 Tulip St

Address 2

City

Philadelphia

State

PA

Sales information

Is the sales contact different from the beneficiary?

Yes

No

Save

Notes

You have no notes for this profile

+ Add note

Tasks

You have no tasks for this profile

+ Add task

Quote history

You have no quotes for this beneficiary

Enrollment History

Health Partners Medicare Special
 Submitted 09/09/2022 12:16 pm PST Confirmation A92685346672767M [View application](#)

Total monthly plan premium **\$0.00**

< Previous

Add preferences >

Continue to SOA

Continue to plans

The Profile page can also be found by Searching Beneficiary or using the New Profile button at the top of the navigation page.

You are encouraged to add as much information as possible on the Profile page because information does prepopulate throughout the system, specifically the information in electronic enrollment form.

Create Profile

If a profile does not exist for a lead, you can create one. Creating a profile is the first step of a consultation and is required to send an SOA or send a link to the Consumer site through Connecture.



Search beneficiaries

There are no results for the profile you searched, but you may create a new profile with that information.

[Create a new profile](#)

or [search again](#)

[Create a new profile](#)

1. To begin a new consultation, click [Create a new profile](#). You can now input the beneficiary's health, subsidy, and drug information into Connecture.
2. After selecting **Create a new profile** you will be taken to the Profile tab. The only required fields are first name, last name, date of birth, and ZIP code.

Profile

Personal information

***ZIP code**

19104

County
Philadelphia, PA

*** First name**

Susan

*** Last name**

Smith

Date of birth

03/28/1956



Email address

Phone number



MBI

 [Show](#)

Hospital (Part A) effective date

Month  Year 

Medical (Part B) effective date

Month  Year 

Home address

Address 1

Address 2

City

State

Sales information

Is the sales contact different from the beneficiary?

Yes

No

Save


Notes

You have no notes for this profile

 Add note

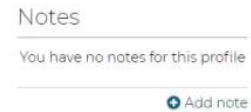
Tasks

You have no tasks for this profile

 Add task

Create/View Notes

Notes can be added to a profile from the Profile page. To add a note, click



on

the right navigation. Select

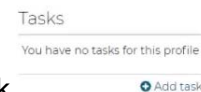


to add your note.

You can add a note if there is anything specific that you want to mention to the beneficiary, as you move through the system existing notes will start to prepopulate for you as the agent.

Create/View Tasks

As with notes, Tasks can be added from any Profile. To add a note, click



+ Add task

on the right

navigation panel. Select



to add your task.

Quote History

Within the Profile page you will also see a section called Quote History. In this section you will see any quotes sent to the beneficiary in the past as well as enrollment history. You will be able to view past enrollment in PDF form.

You will also be able to continue with an enrollment that may already be in progress.

Quote history

Quote sent 10/06/2020

brokertest
brokertest brokertest
Authorization code: ZRRMSHNC

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

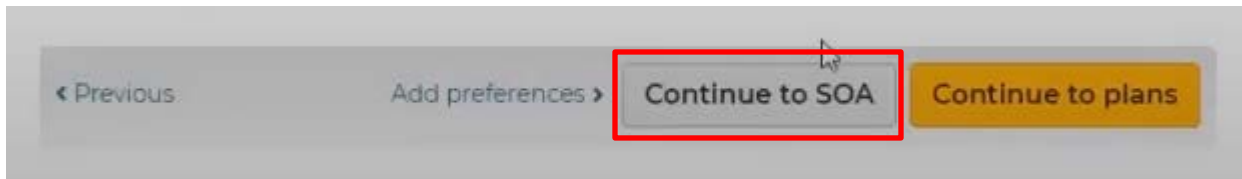
Enrollment history

You have no enrollments for this beneficiary

SUBMIT AN SOA

Send and Complete Scope of Appointment

The SOA button will be found at the bottom of the Profile page, by clicking



1. Once on the SOA page, there are four different ways to complete the SOA.
 - a. You can upload your own SOA form by clicking on the upload button.
 - b. You can print a consumer form and upload that back into the system.
 - c. You can send an electronic SOA via email or electronic text.
 - d. You can take the enrollment using the call recording option. Details are explained later in the Agent Call Recording section.

A screenshot of the 'Scope of Appointment' page. The title 'Scope of Appointment' is centered. Below it is a paragraph: 'A Scope of Appointment is required for all sales appointments. Submit the SOA once you have received it from the beneficiary.' Below this is a section titled 'SOAs' with a message: 'You have no SOAs for this profile'. At the top right of the form area are two buttons: 'Print consumer form' and 'Upload', both highlighted with red boxes. Below these are two input sections. The first is 'Email address' with a text field containing 'jeurittdemo@gmail.com' and a button 'Email SOA', both highlighted with a red box. The second is 'Phone number' with a text field containing '(790) 869-8472' and a button 'Text SOA', both highlighted with a red box. A mouse cursor is hovering over the 'Text SOA' button.

2. Once an SOA form has been completed by the beneficiary, you will see the below message appear on the SOA page.

SOAs

Completed by Mark Smith on 10/06/2020

• Stand alone Medicare Prescription Drug Plans Part D

Close form

3. As the agent, you will have to finish the form by selecting Complete Form.

SOAs

Completed by Mark Smith on 10/06/2020

• Stand alone Medicare Prescription Drug Plans Part D

Complete form

Print consumer form | Upload

4. Your agent first and last name will prepopulate, but you will need to populate the fields below:

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*

brokertest

Agent Last Name*

brokertest


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.



5. Once you have filled out all fields, click on .
6. Once you submit the broker form, you will see that the SOA was completed and you will also be able to view a PDF of that scope.

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

 Completed 10/06/2020	<ul style="list-style-type: none"> Stand alone Medicare Prescription Drug Plans Part D 	 View
--	---	--

 Print consumer form |
  Upload

7. Once you have completed the Scope of Appointment, you will see two options at the bottom of the screen: Add Preference and Continue to Plan.

[< Previous](#)

[Add preferences](#)

[Continue to plans](#)

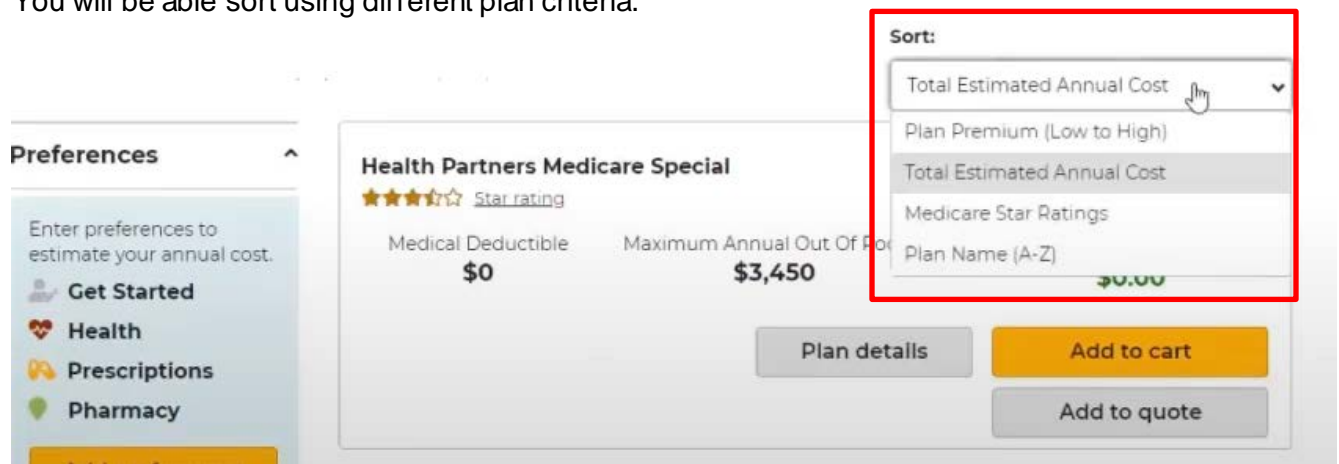
VIEWING AND COMPARING PLANS

The plan list page will display all the plan options you can select as an agent.

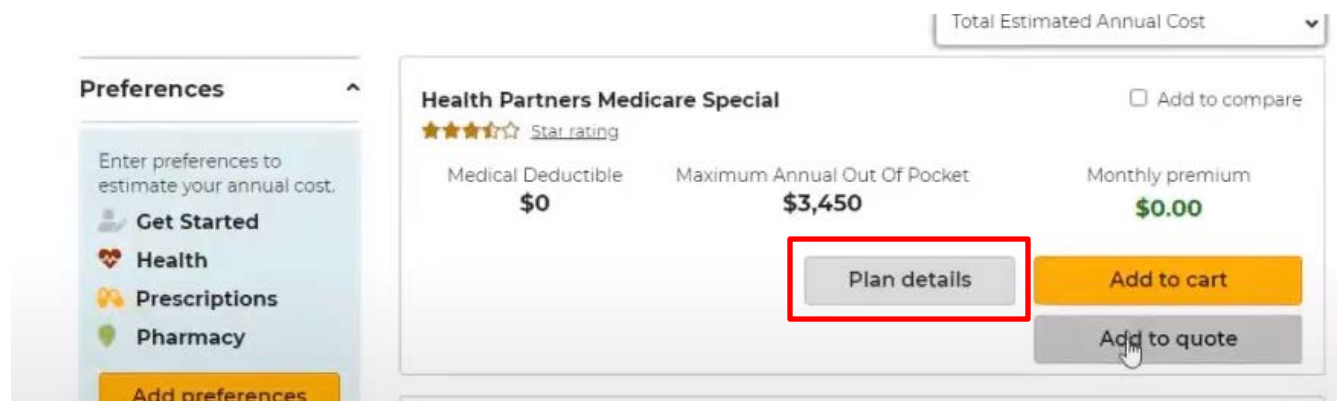
1. You will see the different plan types at the top of the screen.



2. You will be able sort using different plan criteria.



3. You can view individual plan details by clicking on Plan Details.



4. You can add to quote a plan.



5. You can add a plan to your cart to begin the enrollment process.



6. You can also select up to three plans to compare side by side.



Adding Preferences

On the left side of the screen, you will see the Preferences options box. At this point you can go in and start adding beneficiary preferences. To do this click on the Add Preferences button.

Preferences

Enter preferences to estimate your annual cost.

- [Get Started](#)
- [Health](#)
- [Prescriptions](#)
- [Pharmacy](#)
- Add preferences**

Health Partners Medicare Special ☐ Add to compare

★★★★☆ Star rating

Medical Deductible	Maximum Annual Out Of Pocket	Monthly premium
\$0	\$3,450	\$0.00

[Plan details](#) [Add to cart](#) [Add to quote](#)

Health Partners Medicare Complete ☐ Add to compare

★★★★☆ Star rating

Get Started Page

Once you click on Add Preferences you will be directed to the get started page.

1. The beneficiary zip code will prepopulate
2. You will be able to select what coverage type they are interested in.

Get Started

☒ **Get Started**

☐ Health

☐ Prescriptions

☐ Pharmacy

[Go to plans >](#)

***ZIP code**

19103 Philadelphia, PA

These optional questions help us estimate your potential costs.

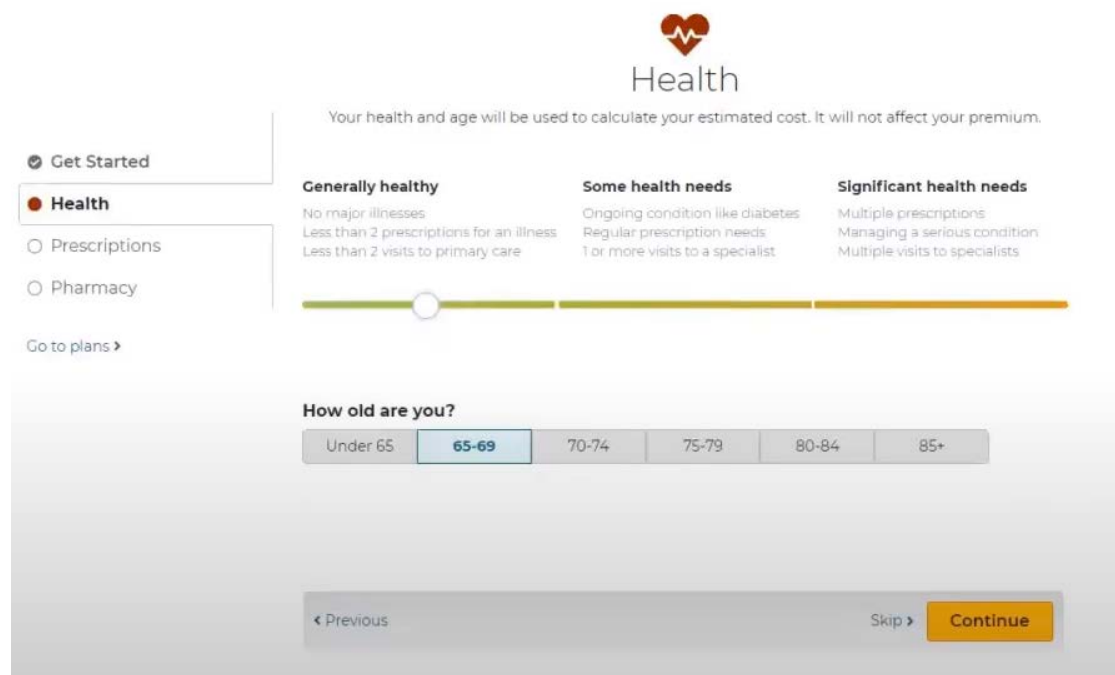
What coverage type are you interested in? (Optional)

☒ Medical only
 ☒ Prescription drug
 ☒ Medical and prescription drug
 ☐ I don't know

[< Previous](#)
[Skip >](#)
[Continue](#)

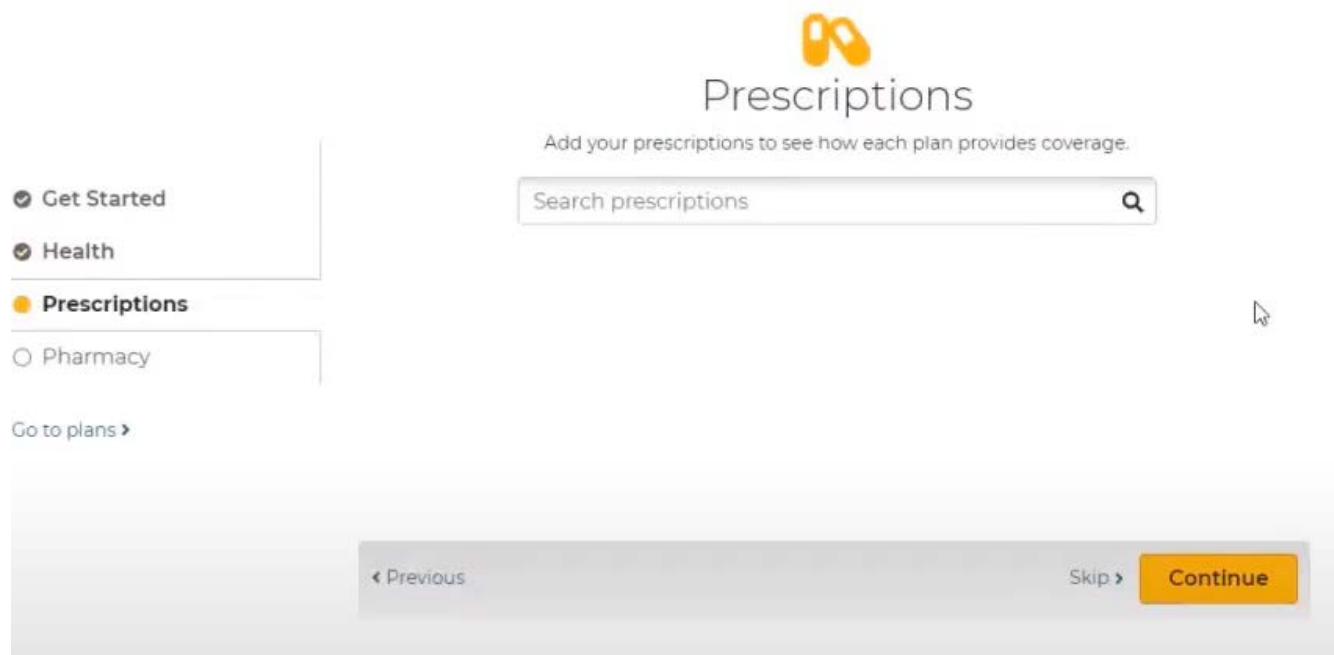
What you answer here will be reflected on the plans list page. Also, on this page you will be able to enter the following:

1. Health Preferences



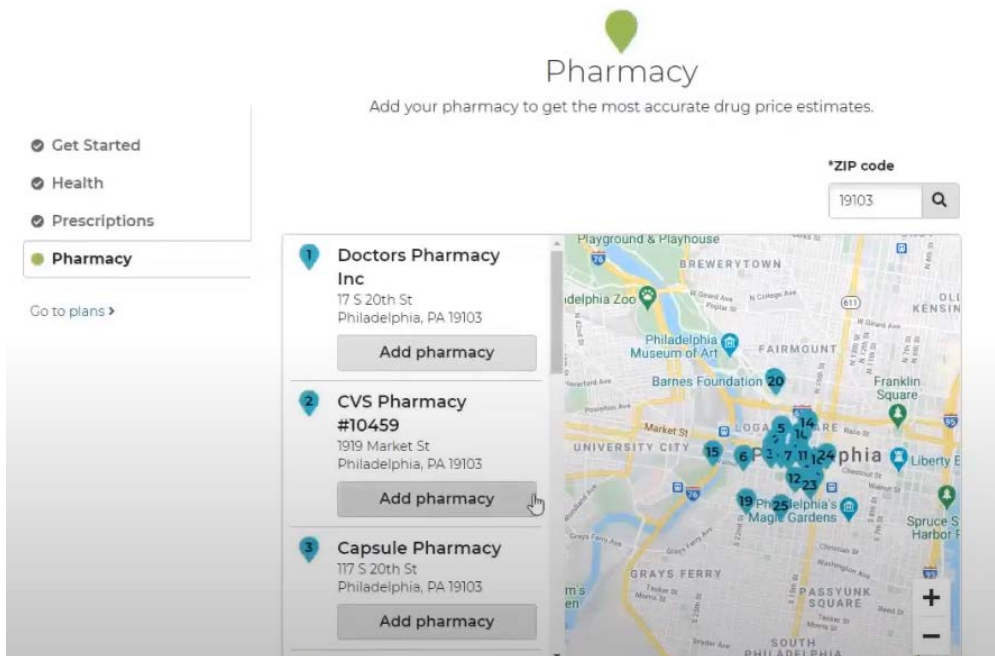
The "Health" form features a heart icon and the title "Health". A sidebar on the left contains a "Get Started" button and three radio buttons: "Health" (selected), "Prescriptions", and "Pharmacy". Below the sidebar is a "Go to plans" link. The main content area explains that health and age will be used for cost estimation. It presents three categories: "Generally healthy" (no major illnesses, fewer than 2 prescriptions, fewer than 2 visits), "Some health needs" (ongoing conditions, regular prescriptions, 1 or more visits), and "Significant health needs" (multiple prescriptions, serious conditions, multiple visits). A progress bar shows the first step is complete. Below this is a "How old are you?" section with buttons for age ranges: "Under 65", "65-69" (selected), "70-74", "75-79", "80-84", and "85+". At the bottom are "Previous", "Skip", and "Continue" buttons.

2. Prescriptions Preferences



The "Prescriptions" form features a pill icon and the title "Prescriptions". The sidebar on the left has "Get Started" and "Health" buttons checked, and "Prescriptions" (selected) and "Pharmacy" as radio buttons. A "Go to plans" link is at the bottom. The main content area prompts the user to "Add your prescriptions to see how each plan provides coverage." and includes a "Search prescriptions" input field with a search icon. At the bottom are "Previous", "Skip", and "Continue" buttons.

3. Pharmacy Preferences



Once your preferences are added, you will see them on the left side of the Plan Details screen. If you need to update the preferences, you can simply click edit next to the preference you need to edit. The plan cards will also be updated once your preferences are selected.

Medicare Advantage Prescription Drug Plans
3 plans

Medicare Advantage Plans
0 plans

Prescription Drug Plans
0 plans

Medicare Advantage Prescription Drug Plans bundle the benefits of a Medicare Advantage Plan and a Prescription Drug Plan. Benefits include medical expenses and prescriptions.

Sort:
Total Estimated Annual Cost

Preferences

- Get Started Edit
Extra help: No, I am not eligible for special assistance
- Health Edit
• Generally healthy
• 65-69
- Prescriptions Edit
benazepril hcl...
memantine hcl...
rosuvastatin c...
- Pharmacy Edit
CVS Pharmacy #...

Health Partners Medicare Special
★★★★☆ Star rating
Medical Deductible: \$0
Maximum Annual Out Of Pocket: \$3,450
Monthly premium: \$0.00
Plan details
Add to cart
Add to quote
Prescriptions: 3 of 3 covered
Pharmacy: 1 of 1 covered
Est. drug cost: \$624
Total est. annual cost: \$1,351

Health Partners Medicare Complete
★★★★☆ Star rating
Medical Deductible: \$0
Maximum Annual Out Of Pocket: \$7,550
Monthly premium: \$0.00

PLAN COMPARISON

Compare Plans

From the Plan Overview screen, you will have the ability to compare up to three plans to compare side by side by clicking on Add to Compare.

1. Select the three plans you would like to compare and click Compare now.

Preferences

- Get Started** Edit
Extra help: No, I am not eligible for special assistance
- Health** Edit
• Generally healthy
• 65-69
- Prescriptions** Edit
benazepril hcl...
memantine hcl ...
rosuvastatin c...
- Pharmacy** Edit
CVS Pharmacy #...

Filters Clear all

Plan subtypes

- ☐ HMO
- ☐ HMOPOS

Plan Name	Medical Deductible	Maximum Annual Out Of Pocket	Monthly premium	Prescriptions	Pharmacy	Est. drug cost	Total est. annual cost
Health Partners Medicare Special ★★★★☆ Star rating	\$0	\$3,450	\$0.00	3 of 3 covered	1 of 1 covered	\$624	\$1,351
Health Partners Medicare Complete ★★★★☆ Star rating	\$0	\$7,550	\$0.00	3 of 3 covered	1 of 1 covered	\$120	\$1,743
Health Partners Medicare Prime ★★★★☆ Star rating	\$0	\$7,550	\$37.50				

The 'Compare now' button for the 'Health Partners Medicare Complete' plan is highlighted with a red box.

This will take you to the Compare Plans page.

Compare Plans

	Health Partners Medicare Special	Health Partners Medicare Complete	Health Partners Medicare Prime
<input checked="" type="checkbox"/> Show plan differences Send quote	★★★★★☆ Star rating Monthly premium \$0.00	★★★★★☆ Star rating Monthly premium \$0.00	★★★★★☆ Star rating Monthly premium \$37.50
	Plan details Add to cart	Plan details Add to cart	Plan details Add to cart

Costs			
Est. drug cost Based on 3 drugs Add/edit	\$624 annually	\$120 annually	\$120 annually
Health cost Estimated medical costs based on age 65-69 and Generally healthy. Add/edit	\$727 annually	\$1,623 annually	\$1,620 annually
Total est. annual cost Based on premium, health and drug costs.	\$1,351 annually	\$1,743 annually	\$2,190 annually

Benefits			

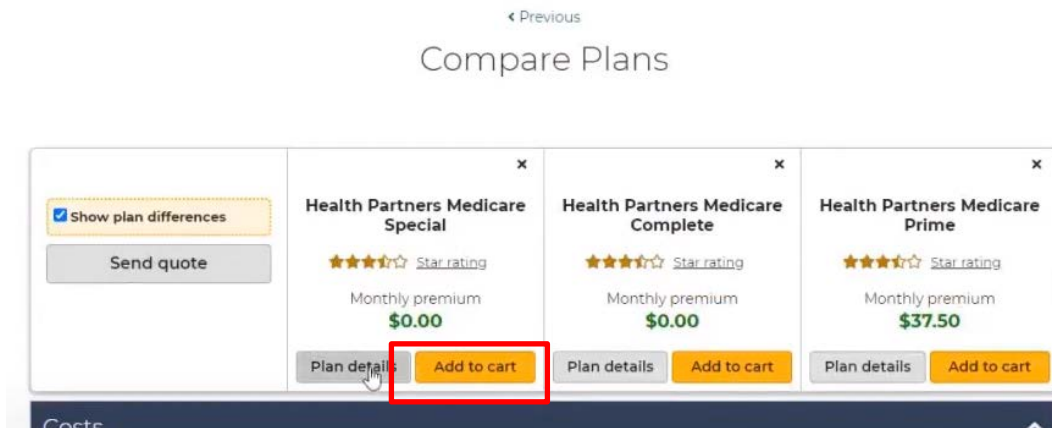
Make sure that you check off Show Plan Differences so that you can see the plan difference highlighted in yellow.

You will also see that the plan details are broken down in sections

1. Costs
2. Plan Benefits
3. Pharmacy
4. Prescriptions
5. Provider Directory

From the Compare Plans screen you will also be able to do the following:

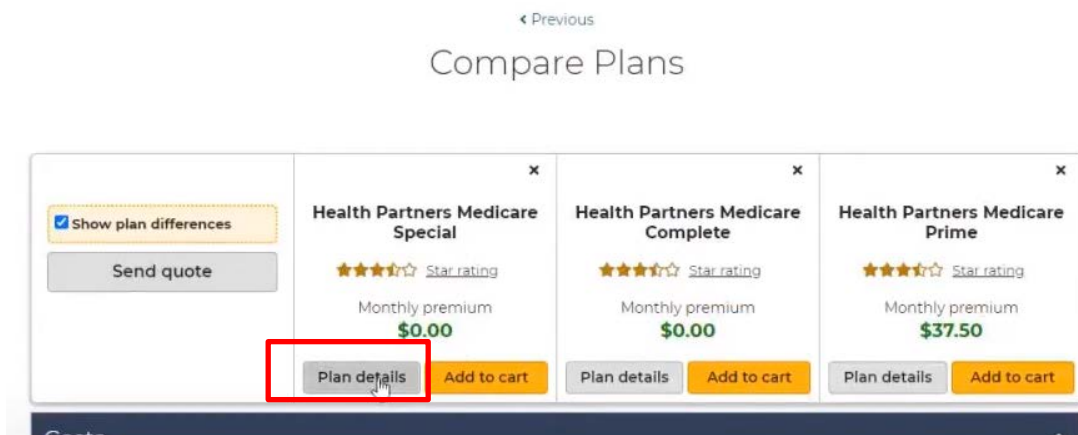
1. Add to Cart



2. You can also send a multi plan quote:



3. Dive deeper into any plan by selecting Plan Details



Plan Details

The plan details page will display the Plan Details tab, as well as Prescriptions and Total Costs.

[< Previous](#)

Health Partners Medicare Special

Plan details
Prescriptions
Total costs

Costs	
Premium	\$0.00 monthly
Est. drug cost <small>Based on 3 drugs Add/edit</small>	\$624 annually
Health cost <small>Estimated medical costs based on age 65-69 and Generally healthy. Add/edit</small>	\$727 annually
Total est. annual cost <small>Based on premium, health and drug costs.</small>	\$1,351 annually

Health Partners Medicare Special

★★★★☆ [Star rating](#)

Monthly premium
\$0.00

[Add to cart](#)

[Send quote](#)

Benefits

Medical Coverage ?

From the Compare Plans page, you will also be able to Add to Cart to begin enrollment process and send a quote.

[< Previous](#)

Compare Plans

☒ Show plan differences

[Send quote](#)

Health Partners Medicare Special	Health Partners Medicare Complete	Health Partners Medicare Prime
★★★★☆ Star rating	★★★★☆ Star rating	★★★★☆ Star rating
Monthly premium \$0.00	Monthly premium \$0.00	Monthly premium \$37.50
Plan details Add to cart	Plan details Add to cart	Plan details Add to cart

Costs

1. To send a quote from the Plan Details page, just click on Send Quote.
2. You can also send multiple quotes from the Plan Comparison screen by selecting Send Quote for up to three plans.
3. When you send a quote, you will see a pop up appear that will allow you to enter the beneficiary's email address and a blank field for you to enter a message to the beneficiary.
4. When you click Send Quote, you will get a message letting you know that the quote was successfully sent.
5. The beneficiary will receive two emails: one with the authorization code email, and one with the quote itself.

ENROLLMENT PROCESS

1. To begin the enrollment process from the Plan Comparison page, click on Add to Cart.

The screenshot shows a web interface for comparing Medicare plans. On the left is a 'Preferences' sidebar with sections: 'Get Started' (Extra help: No, I am not eligible for special assistance), 'Health' (Generally healthy, 65-69), and 'Prescriptions' (benazepril hcl, memantine hcl). The main area displays 'Health Partners Medicare Special' with a star rating. Key financial details are shown: Medical Deductible \$0, Maximum Annual Out Of Pocket \$3,450, and Monthly premium \$0.00. At the bottom, it lists 'Prescriptions 3 of 3 covered', 'Pharmacy 1 of 1 covered', 'Est. drug cost \$624', and 'Total est. annual cost \$1,351'. Two buttons are present: 'Plan details' and 'Add to cart' (highlighted with a red rectangle). A 'Compare now' checkbox is also visible.

2. You will now see the Cart screen. You will have two options; 1) send to beneficiary to sign and submit or 2) complete and submit the form yourself. **The second option should be used only if you are sitting face to face with the beneficiary.**
3. Click Continue to apply.
4. You will now see the Enrollment Form appear.
 - a. A progress bar will mark your progress on the application
 - b. Since you entered some of the information when you created the beneficiary profile, that information will prepopulate on the enrollment form
 - c. All required fields must be prepopulated, or you will not be able to move forward
5. Once all information is filled out, you will have the option to send to beneficiary via email or text by clicking on Send to Beneficiary
6. A success message will appear, and the beneficiary will once again receive two emails: one with an authorization code, and the other email with the application.
7. The beneficiary will be able to submit the application from their confirmation email.

AGENT CALL RECORDING

Use Agent Call Recording to record the shopping experience, plan comparisons, Scope of Appointments AND enrollments.

1. For Shopping, Plan Comparisons and SOA: Agent can call the beneficiary for their scheduled appointment (outbound calls). For Enrollment ONLY interactions: Agent can call the beneficiary (outbound calls) .
2. Once you are on the Profile page, the Start Call Recording button will be located on the top right side of the screen.

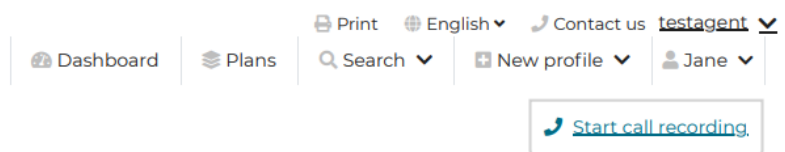
The screenshot displays the 'Health Partners Medicare' interface. At the top, there is a navigation bar with links for 'Print', 'English', 'Contact us', and a user profile 'testagent'. Below this is a secondary navigation bar with 'Dashboard', 'Plans', 'Search', 'New profile', and a user dropdown 'John'. The main heading is 'Profile'. On the right side of the profile page, there is a prominent 'Start call recording' button. Below the heading, the page is divided into two sections: 'Personal information' and 'Notes'. The 'Personal information' section contains a form with a 'ZIP code' field (containing '19124') and a 'County' dropdown (set to 'Philadelphia PA'). The 'Notes' section shows a message: 'Call recording initiated with - testagent testagent' and 'Created 10/14/2022', with an 'Add note' button below it.

3. Call recording information is clearly displayed in the sidebar on the right-hand side of the screen on the platform.
4. Agent takes the beneficiary through Scope of Appointment, Shopping and Enrollment. Recordings are linked with beneficiary profile for ADMIN to retrieve and review.
5. The recordings will be stored in the Connecture site for one year.

HEALTH ASSESSMENT FORM

Health Partners Medicare is now offering an incentive payment to all brokers who complete a Health Assessment during a 2023 enrollment in our [Special \(SNP HMO\) plan](#), [Silver \(HMO-POS\) and Platinum \(HMO-POS\)](#) plans. The Health Assessment can be completed and submitted through [Connecture](#).

Once an application is submitted, you will have the option to complete the beneficiary's Health Assessment form by clicking on the Complete Health Assessment button of the Application Confirmation email.



Application submitted



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

Please complete the plan's optional Health Risk Assessment to gather more information about your health so they may provide health improvement suggestions.

[Complete Health Risk Assessment](#)

Health Partners Plans

901 Market Street Philadelphia, PA 19107
8 a.m. - 8 p.m., 7 days a week, Oct. 1 - March 31 and Monday - Friday, April 1 - Sept 30
(833) 477-4773 TTY (877) 454-8477
<https://www.hppmedicare.com>

Once submitted, the Health Assessment will be transmitted to HPP's Care Coordination team.