

What's New for Medicare



Thank you for being a valued Enroll Your Clients customer. We are excited to partner with you for Plan Year 2020. Here is a summary of the new functionality available.

The following enhancements are included for brokers and/or agents in EYC.

Scope of Appointment (SOA) Upload, Download, Confirmation

- Brokers will now receive an email when a beneficiary completes their portion of the SOA
- Ability to upload external SOAs on the member profile
- Ability to download SOAs as PDFs from the member profile

Member to Broker Association

In the member demographics pre-load file, each member record can be associated to a broker, also known as agent of record.

- Broker will have access to the information loaded by the member
- Broker will receive email when the member completes an enrollment
- Broker identifier can be included in the enrollment export if the member self-enrolls

Dashboard Updates

- The broker dashboard will be updated real-time

CRM Integration

- Minimize data duplication efforts when integrating with Salesforce
- Ability to pass predefined bi-directional information between systems
- Update CRM with completed enrollment information

General Enhancements

- Secondary validation for agent permission when consumer self-enrolls via a quick quote or broker marketing URL
- Display of agent selling permissions on agent account page
- Exit message warning to show consumer when leaving the website
- Ability to display and remove selected pharmacy within guided help