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Private Medicare Exchange  
Marketing to Enrollment

Agent User Guide



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## 1. How do I link to my website?

To add a link to your MedicareValue website on your business website, add a clickable hyperlink. **NOTE: The URL will be the same address as your MedicareValue website address.**

CareValue has banners that can be added to your business website with links to your MedicareValue website. [View the catalog of MedicareValue branded materials here.](#)

It's best to have your site manager update your website by providing them with the link to your MedicareValue page. CareValue is unable to manage your personal website.

## 2. Can I set up multiple pages?

Each MedicareValue page is linked to one specific agent using a code that ties the page to that agent. Each agent can only have **ONE** code assigned to them, therefore an agent can only have one active MedicareValue page at a time.

## 3. What's a vanity URL and how do I use it?

**Ex. [www.b-doyle.com](http://www.b-doyle.com) redirects to [MedicareValue.com/briandoyle](http://MedicareValue.com/briandoyle)**

First, the agent needs to own a domain or website URL such as [vanitysite.com](http://vanitysite.com). Then, the agent needs to have their site manager create a "redirect" so that when someone browses to [vanitysite.com](http://vanitysite.com) they are automatically redirected to their MedicareValue URL.

## 4. Can I add a logo to my web page?

MedicareValue offers the ability to make the site a little more personal by adding an agency/business logo to the page. You also have the option to link that logo directly to your business website. If you're interested in this contact us at 855-888-8326 or at [support@medicarevalue.com](mailto:support@medicarevalue.com)



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## 5. Rules for activating carriers for online enrollment

MedicareValue's online enrollment feature is currently available for select carriers. Requirements for enabling online enrollment buttons on your MedicareValue website:

1. CareValue must have on file, copies of all current state licenses for the states in which the agent wishes to offer the online enrollment features.
2. Agent must be fully appointed and certified with the carrier(s) with which they will offer online enrollment.
3. CareValue must receive notification from the carrier, including the date certification was completed.

**NOTE: If an agent is not fully appointed and certified with a qualifying carrier they can only use MedicareValue as a quoting tool and eSOA generator.**

Site with Enrollment Functionality

Medicare Blue Choice Select (HMO-POS)  
Excellus Health Plan, Inc ★★★★★

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**\$0** Monthly Premium    
**\$6700** Maximum out of Pocket

Type  
HMO

Copay  
\$15 PCP  
\$50 Specialist

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[Enroll](#)

[Contact Licensed Sales Agent](#)

Site without Enrollment Functionality

Medicare Blue Choice Select (HMO-POS)  
Excellus Health Plan, Inc ★★★★★

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[Contact Licensed Sales Agent](#)

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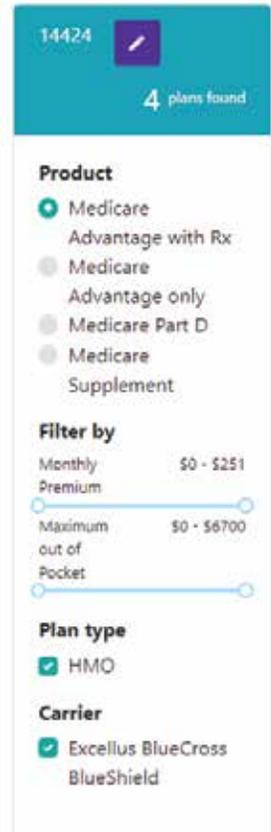
## 6. How does filtering work?

There are many filtering options on MedicareValue. There is also a "Help with Terms" section to help define the filter. Users can filter results by:

1. Product
2. Monthly premium amount
3. MOOP (maximum out-of-pocket)
4. Plan type
5. Carrier

The user-friendly filtering options are listed on the left side of the MedicareValue plan display page.

Left Side Filter Options



**Product**

- Medicare Advantage with Rx
- Medicare Advantage only
- Medicare Part D
- Medicare Supplement

**Filter by**

Monthly Premium: \$0 - \$251

Maximum out of Pocket: \$0 - \$6700

**Plan type**

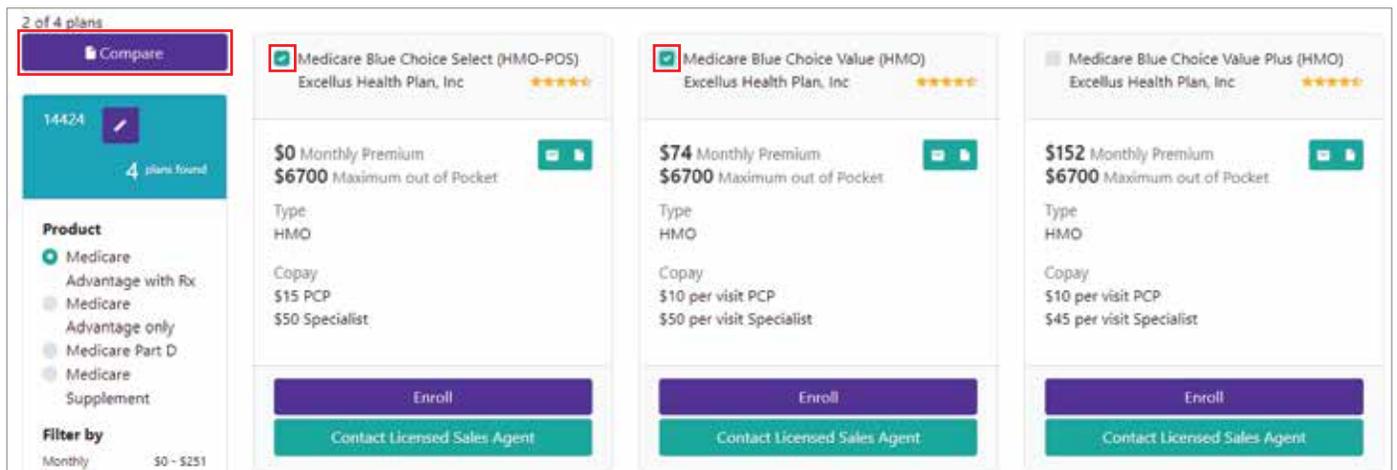
- HMO

**Carrier**

- Excellus BlueCross BlueShield

## 7. How can I compare plans?

1. Select plans you wish to compare
2. Hit compare



2 of 4 plans

**Compare**

14424 4 plans found

**Product**

- Medicare Advantage with Rx
- Medicare Advantage only
- Medicare Part D
- Medicare Supplement

**Filter by**

Monthly Premium: \$0 - \$251

Plan Name	Carrier	Rating	Monthly Premium	MOOP	Type	Copay	Buttons
Medicare Blue Choice Select (HMO-POS)	Excellus Health Plan, Inc	★★★★★	\$0	\$6700	HMO	\$15 PCP \$50 Specialist	Enroll, Contact Licensed Sales Agent
Medicare Blue Choice Value (HMO)	Excellus Health Plan, Inc	★★★★★	\$74	\$6700	HMO	\$10 per visit PCP \$50 per visit Specialist	Enroll, Contact Licensed Sales Agent
Medicare Blue Choice Value Plus (HMO)	Excellus Health Plan, Inc	★★★★★	\$152	\$6700	HMO	\$10 per visit PCP \$45 per visit Specialist	Enroll, Contact Licensed Sales Agent

## 8. How do I send a specific plan's enrollment link?

Select the envelope icon for the appropriate plan. The "share with a friend" feature will display and provide you with a URL sharing option.

1. Click the Envelope icon, enter the email address, enter a short message, and click send.

**IMPORTANT: In order for the email link to work correctly, you must have a default email program installed on the computer you're using.**

Medicare Blue Choice Select (HMO-POS)  
Excellus Health Plan, Inc ★★★★★

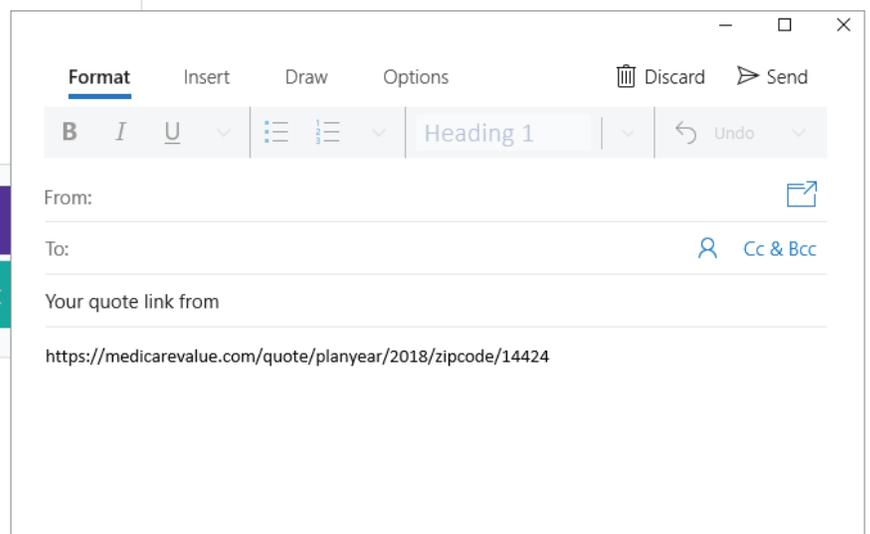
**\$0** Monthly Premium  
**\$6700** Maximum out of Pocket

Type  
HMO

Copay  
\$15 PCP  
\$50 Specialist

**Enroll**

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Format Insert Draw Options Discard Send

**B** *I* U | | | Heading 1 | | Undo

From: 

To:  Cc & Bcc

Your quote link from

<https://medicarevalue.com/quote/planyear/2018/zipcode/14424>



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## 9. How does a client view plan details?

The client can select the plan details icon on the right of the plan.

Medicare Blue Choice Select (HMO-POS)  
Excellus Health Plan, Inc
★★★★★

**\$0** Monthly Premium  
**\$6700** Maximum out of Pocket

Type  
HMO

Copay  
\$15 PCP  
\$50 Specialist

Enroll

Contact Licensed Sales Agent

**Medicare Blue Choice Select (HMO-POS)**  
Excellus Health Plan, Inc

**\$0** Monthly Premium  
**\$6700** MOOP

★★★★★

✕

Category	Summary
Health plan deductible	\$0
Other health plan deductibles?	In-Network: No
Maximum out-of-pocket enrollee responsibility (does not include prescription drugs)	\$6,700 In-network
Optional supplemental benefits	No
Inpatient hospital coverage	In-Network: \$360 for days 1 through 5 \$0 for days 6 through 90 Out-of-Network: 30% per stay
Outpatient hospital coverage	In-Network: 20% per visit Out-of-Network: 30% per visit
Doctor visits	Primary: In-Network: \$15 Primary: Out-of-Network: 30% per visit Specialist: In-Network: \$50 Specialist: Out-of-Network: 30% per visit
Preventive care	In-Network: \$0 copay Out-of-Network: 30%
Emergency care/Urgent care	Emergency: \$80 per visit (Worldwide coverage), Urgent care: \$50 per visit (Worldwide coverage).
Diagnostic procedures/lab services/imaging	Diagnostic tests and procedures: In-Network: \$15 Diagnostic tests and procedures: Out-of-Network: 30% Lab services: In-Network: \$15 Lab services: Out-of-Network: 30% Diagnostic radiology services (e.g., MRI): In-Network: 20% Diagnostic radiology services (e.g., MRI): Out-of-Network: 30% Outpatient x-rays: In-Network: \$55 Outpatient x-rays: Out-of-Network: 30%
Hearing	Routine Exam: \$45, Diagnostic/Treatment Exam: In-Network: \$50, Diagnostic/Treatment Exam: Out-of-Network: 30%, Fitting/evaluation: Covered as part of the Hearing aid copay, Hearing aids: In-Network: \$699-\$999



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## 10. How do I send a Permission to Contact/Scope of Appointment?

There are two simple ways for the client to get to the Permission to Contact/Scope of Appointment (eSOA). The first is to direct clients to your main page and have them click Contact Us in the top right-hand corner.

Another option is to send them your own Personalized SEAL link to your own MedicareValue website followed by "/contact-us" on the end.

(ex. <https://medicarevalue.com/agentname/contact-us>)

Using your personalized SEAL in the website address with the "/contact-us" will direct users to your personal SOA/permission-to-contact form.



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## 11a. How do I send a Permission to Contact/Scope of Appointment? Continued...

Your client will enter the required information into the eSOA then click Submit. This generates a lead and an eSOA for this client and saves them in your AllRep CRM.

### Contact

I'd like to talk to a licensed sales agent at MedicareValue to discuss my Medicare options

**1 Contact details**

First Name  Last Name

Zip Code  Phone

Email

Who referred you (if anyone)

Yes, I am seeking information for a loved one.

What is the best time to contact me?

**2 I am interested in (select all that apply)**

- Stand-alone Medicare Prescription Drug Plans (Part D)
- Medicare Advantage Plans (Part C) and Cost Plans
- Dental/Vision/Hearing Products
- Hospital Indemnity Products
- Medicare Supplement (Medigap) Products

**3 Digital Signature for Scope of Appointment**

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

By entering your information below and clicking Submit, you are giving permission to have a licensed sales agent contact you by email, telephone or call phone to provide additional information about products and services. Your consent is voluntary and allows us to contact you via email, text messaging, artificial or prerecorded voice messages, or automatic dialing for marketing purposes. You may contact us to change your preferences at any time. Data use charges and rates from your cellular carrier may apply.

**By signing this form, you agree to be contacted by a licensed sales agent to discuss the types of products you selected 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.

The Centers for Medicare and Medicaid Services requires agents to document the scope of a marketing appointment prior to any 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.

Type your first & last name  Re-Type your first & last name

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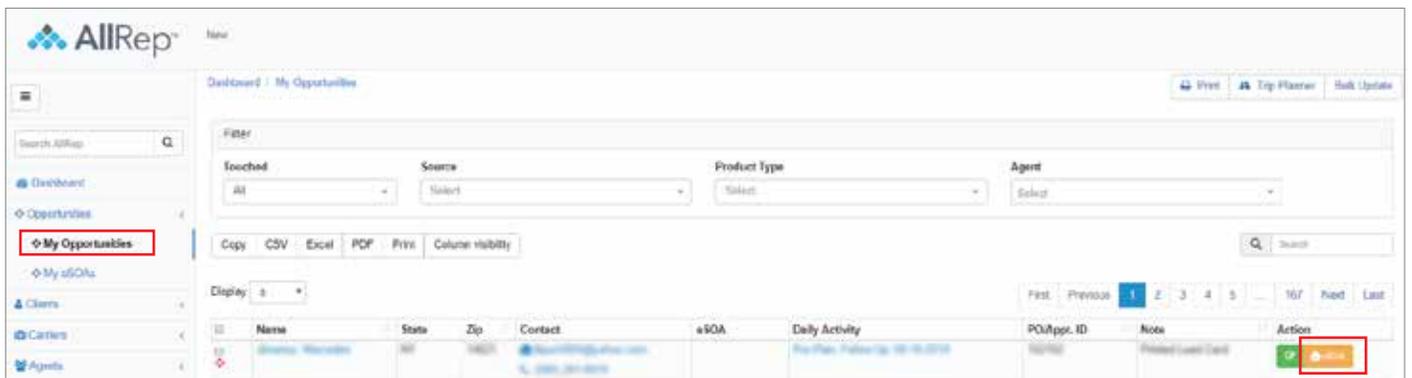


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## 11b. How do I send a Permission to Contact/Scope of Appointment? Continued...

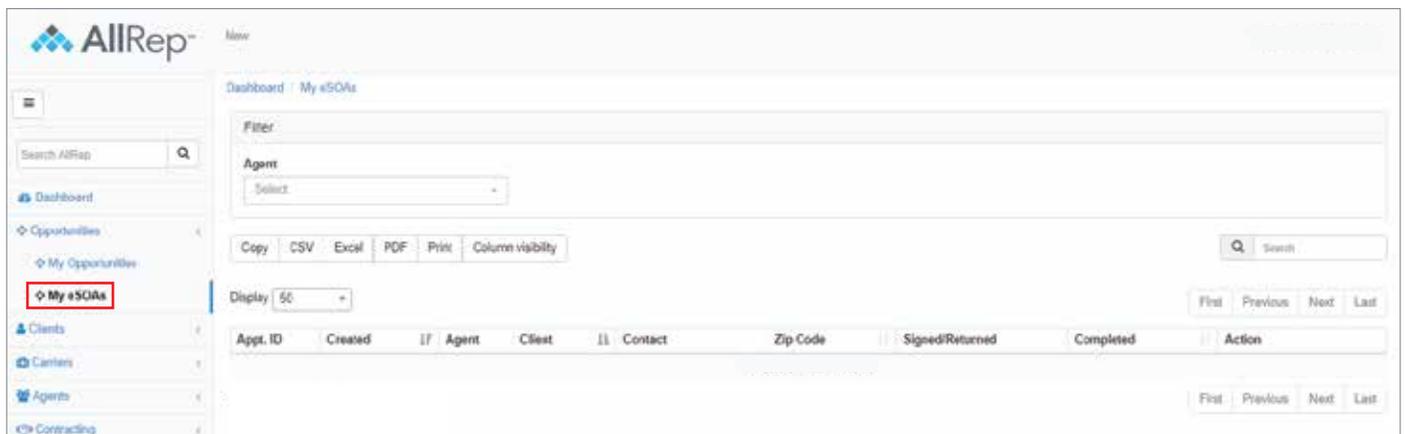
Log into your AllRep CRM ([Allrep.com](http://Allrep.com)) click Opportunities, My Opportunities from the left hand menu, and then select the eSOA button the the right corresponds with the opportunity.

**NOTE:** You must have a valid email address for the beneficiary to send an eSOA from AllRep



## 12a. Where do I find my leads?

A "lead" is always viewable in the agent's AllRep CRM, [Allrep.com](http://Allrep.com) under the Opportunities menu, My eSOAs.



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## 12b. What should I do with eSOA?

In AllRep navigate to Opportunites, My Opportunities, and click the eSOA link associated with the opportunity. You can change the Appointment Date & Time on the form, be sure to click Save after making any changes.

Click the Save and Download option to save the eSOA as a PDF and make it available for download and printing.

**IMPORTANT: After you click Save and Download, the form is no longer editable. The Appointment Date and Time entered on the eSOA cannot be edited.**

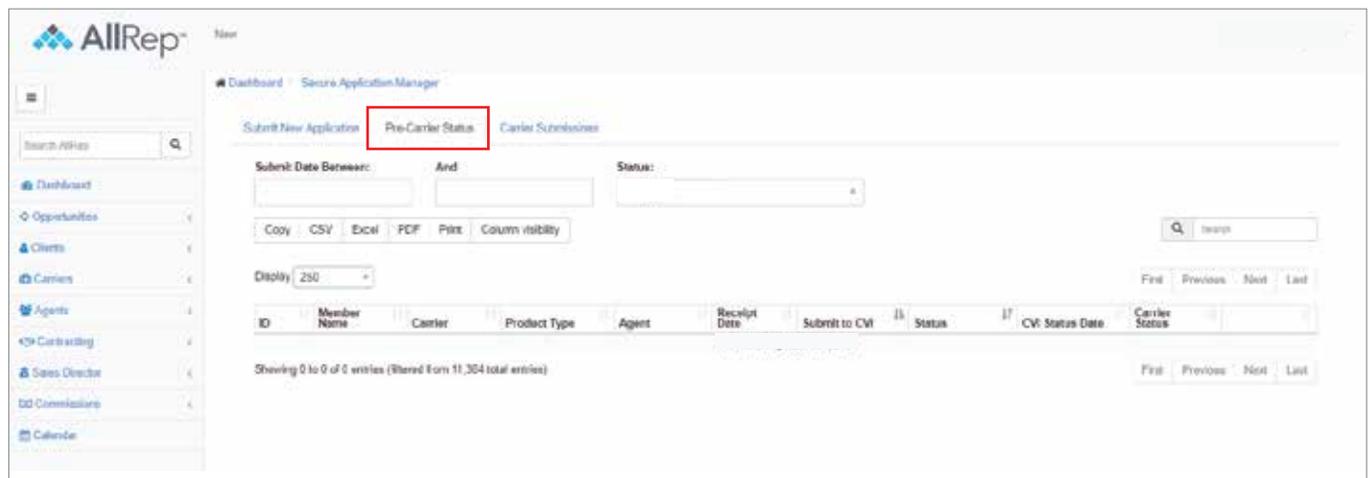
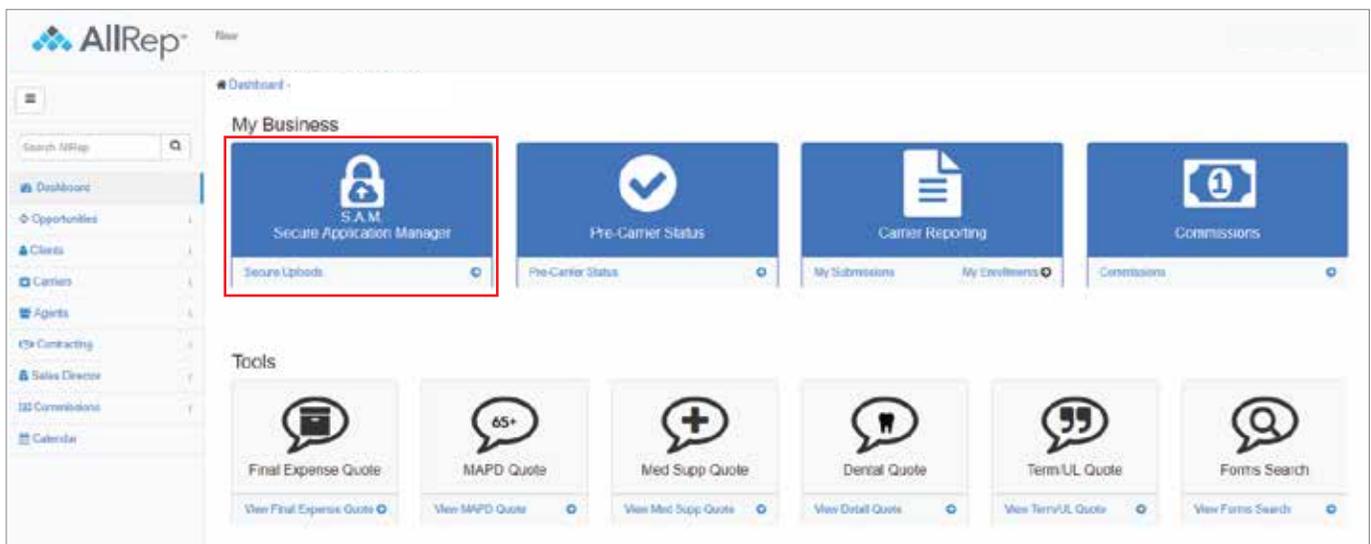
We suggest that you don't Save and Download the form until the day of the meeting. If you Save and Download the form prior to the meeting and the day and time change, you will need to generate a new eSOA with the corrected appointment information. If the scope is taken during lock-in and the appointment is rescheduled during Annual Enrollment Period, you will still need a new SOA.

After you click Save and Download, a PDF of the scope will be saved to your computer. You will need to print and sign this scope prior to the appointment for it to be compliant. You will need to treat this scope like you would any other paper scope, including keeping it for your records and submitting it for processing.

### 13. Where do I find my enrollments?

[Allrep.com](https://www.allrep.com)

You can find enrollments inside AllRep on your dashboard by clicking the Pre-Carrier Status button as shown below.





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## 14a. How can I promote my MedicareValue web page?

There are several ways to promote your MedicareValue web page:

- Add your personalized MedicareValue SEAL to your business card
- Add your personalized MedicareValue SEAL to your current business website by using a clickable hyperlink
- Add your personalized MedicareValue SEAL to your email signature

CORRECT

Medicarevalue.com/yourSEAL

INCORRECT

~~Medicarevalue.com~~

- Email your clients (following all CMS marketing guidelines), with your MedicareValue website address and explanation of the site
- Request customized marketing materials through our [MedicareValue Ad Request Form](#)
  - Newspaper ads (full-size, half-page, quarter-page, custom)
  - Web banners (full banner, leader-board, square, custom)
- Work with Affinity Partners. (see Section 14b)



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## 14b. What is an affinity partner?

An affinity partner is a company, organization, or group that you partner with to provide health insurance services. Building a web of affinity partners establishes a professional presence in your community and gives you an air of authority in the local Medicare field.

By building this relationship with your affinity partner, you are providing them with a valuable service. The best affinity partners tend to see many customers around Medicare age. Your partnership allows them to refer any questions or requests for assistance to your capable hands. Some popular examples of affinity partners are:

**Financial:** Bank, Credit Union, Financial Planner

**Professional:** CPA, Attorney

**Retail:** Grocery stores, Pharmacies, Check Cashing

**Community:** Senior centers, Independent Living, Churches, Gyms, Food Banks

**Health care:** Physician's groups, Home Health Care Agencies



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## 15. Do's and Don'ts

1. **DO** Make sure you are certified and ready to sell (RTS) before directing consumers to the online enrollment page. Make sure the "Enroll " button is active!
2. **DO** Provide clients your specific personalized MedicareValue.com SEAL
3. **DO** Follow all SOA rules even with the MedicareValue.com eSOA. Retain your hard copy of your eSOA for at least 10 years.
4. **DO** Complete the eSOA prior to presenting a plan over the phone.
5. **DO** Request permission before emailing a link (i.e., responding to an email request instead of initiating an unsolicited email).
6. **DO** Offer to help clients complete their MedicareValue online enrollment in person or stay on the phone by walking them through the enrollment application after they have received an email with the specific plan details.
7. **DO** Add a clickable link to your website that points to your MedicareValue web page.
8. **DO** Keep your SEAL as short as possible and easily recognizable by your clients.  
NOTE: The maximum is 50 characters.
9. **DO NOT** Send your clients to just the MedicareValue.com website without your agent identification (the /agentname that comes after the main website).
10. **DO NOT** Complete the eSOA or the online enrollment application for the consumer.
11. **DO NOT** Embed your MedicareValue website into another website! (the address "MedicareValue.com must stay in the address bar)
12. **DO NOT** Use any of the following: - + ~ `@#\$%^&\*() ? <> , in your SEAL
13. **DO NOT** "Test" your enrollment website with fake data (this process is live)!



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## FAQs

### **Can an agent have their MedicareValue site associated in any way with their current website?**

Yes, but since the domain name is filed with CMS, it cannot be inside of your website. It would have to be a link or redirect. If you have an established relationship with an affinity partner, you can also link or redirect through that partner's website. Some examples might include: Credit unions, banks, P&C agencies, grocery stores, associations, unions, pharmacies, churches, retiree groups, senior centers, etc. If you decide to link your current site and MedicareValue page, please provide us with the URL of your current site so we can spot check for compliance purposes.

### **How can I market my MedicareValue site to consumers?**

- Add it to your current website via a clickable hyperlink (we would also require your website URL so we can spot check it)
- Add your personalized MedicareValue SEAL to business cards and/or email signature, email your current consumers (subject to CMS marketing guidelines)
- Also, network with a brand that could become an affinity partner

### **Can clients enroll through my MedicareValue website?**

Yes! Clients will have a direct enrollment button with qualifying carriers. The application is only one page and very user friendly. It saves time and you don't have to worry about paper apps, faxing, emailing, or face-to-face appointments.

### **Do I have to send a paper Scope of Appointment to my client?**

No, we now have an electronic SOA on all MedicareValue websites! Your client simply needs to fill out the Contact Us form and you will receive an email notification that you have a client who is wanting to be contacted. The SOA will be found in your CareValue.com/allRep account under Opportunities, My eSOAs.

### **Anything else I should keep in mind?**

Even if you have a website, you really need to link to MedicareValue's unique CMS-accepted quote engine. If you don't have a website, you can use MedicareValue or create a website and link to it. CMS is cracking down on sites that are not CMS-approved and insurance companies will be asking to review web pages. If nothing else, MedicareValue assures your compliance with CMS regulations.

## **I have read and understand the terms of usage for MedicareValue.com**

**Name:** \_\_\_\_\_ **Date:** \_\_\_\_\_

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