MedCareValue®

MEDCAREVALUE SALES PROCESS

We have put together an easy step-by-step guide to walk you through the process of completing an enrollment on MedCareValue during a remote or virtual consultation! A few reminders to help keep you compliant and safe:

- All applications must be accompanied by a completed Scope of Appointment (SOA)
- All applications and SOAs submitted via MedCareValue need to be signed by the beneficiary themselves
- The applicable plan presentation can be done via telephone or video conference for the beneficiary

More information can be found on the MedCareValue User Guide.

If you have any questions, please email us at info@carevalue.com.

1 Reach out to your clients.

As a Licensed Agent, you are permitted to call your existing clients directly. However, new clients and prospects must initiate contact with you. You are not allowed to make cold calls to sell Medicare Advantage or Prescription Drug Plans. Tell your clients about your MedCareValue page and send them your SEAL.

2 Send the Scope of Appointment link.

Instruct your clients to complete the Scope of Appointment. There are a few ways you can accomplish this step, see below:

- Have the client click on the "Contact Us" or "Talk to a Licensed Sales Agent" on your MedCareValue page
- You can also get to the eSOA by clicking on "Contact Licensed Sales Agent" under each plan if you enter a zip code and click on "Get Started" first
- Send a Scope of Appointment Link - The link to your eSOA form will always be: MedCareValue.com/SEAL/Contact-Us, with your **SEAL** being replaced with your agent SEAL (For example: MedCareValue.com/**JohnSmith**/Contact-Us)

3 Walking through the Scope of Appointment.

What is required on the Scope of Appointment:

- Client's First and Last Name
- Phone Number
- Zip Code
- Best Time to Contact Me - Morning, Afternoon, or Evening
- Client Signature (Client will need to sign their name by typing their first and last name in both signature fields. the signatures must be identical in both fields and match what was typed above.)

All product type options are prechecked and we recommend leaving them selected (remember that you don't need to discuss all selected plans, but you cannot discuss any plans not selected).

Once the eSOA is complete, a unique Appointment ID will be generated and emailed to you. The client will receive this email only if they provided an email address on the eSOA. The Appointment ID is needed to complete the enrollment for your member in the plan on MedCareValue.

4 Look up an appt ID or sign the SOA as the agent.

Log in to AllRep and navigate to the "Opportunities" tab on the left-hand side of the screen. Click "My eSOAs" and then find your client from the list shown. The first column on the left hand side will have the appointment ID.

To finalize an eSOA:

Note: Finalizing an eSOA is only required if an enrollment is not completed for the member. Log in to AllRep and navigate to the "Opportunities" tab on the left-hand side of the screen. Click "My eSOAs" and select your client from the list shown; click the green "Finalize" button to the right of that client's record. On the pop-up screen, fill out the initial method of contact, plans discussed, signature, and date. You can also print the eSOA using the orange "Print" button on the far right.

5 Review plan benefit options.

Complete your sales process as you normally would, including in-person, over the phone, or virtually (via Zoom, WebEx, etc). If there are PowerPoint presentations or other sales aides that the carrier requires you to use, be sure to share with the beneficiary. Use the carrier sites to confirm provider and prescription coverage are in-network.

6 Share the enrollment link with your client.

To create a link for emailing, click on the teal "Envelope" icon on the appropriate plan card from the MedCareValue quote and compare screen. From there, either copy the link or use the purple "Envelope" icon to open your email client and send an email directly.

7 Go over the application with your client.

Confirm with your client they are enrolling in the correct plan and then you can assist your client by reviewing each question on the application. Have them sign and select the submit button to send in the application. (NOTE: Client will need to sign their name by typing their first and last name in both signature fields. The signatures must be identical in both fields and match what was typed above.)

8 Confirm application submission.

Once the application has been submitted, you should receive a confirmation email. Then, check that the application was successfully sent to the carrier by viewing the record on the "Current Business" dashboard within AllRep.