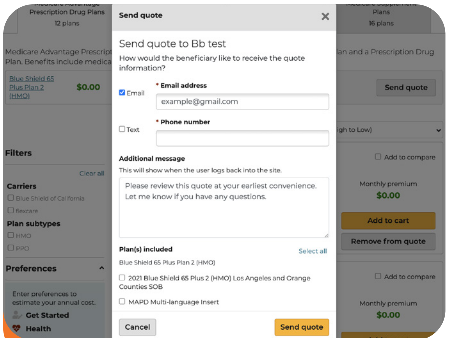
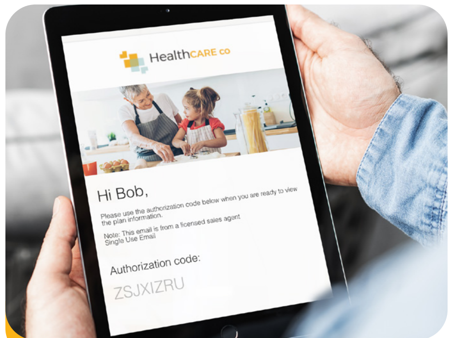
AEP 2024

Sending Personalized Quotes

Sending personalized Quotes to beneficiaries is fast, easy and secure and can be done on a phone, laptop and tablet. Select up to three plans to send to a beneficiary at one time and include a personal note.

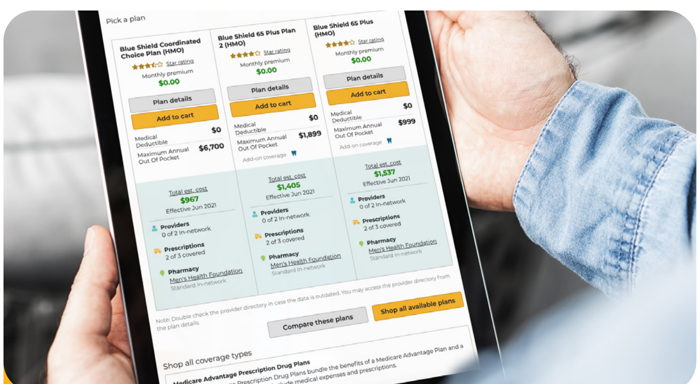


1. Send a quote with up to three plans (of the same type) at a time. Note: If sending only one plan, agent can include plan documents in the quote.

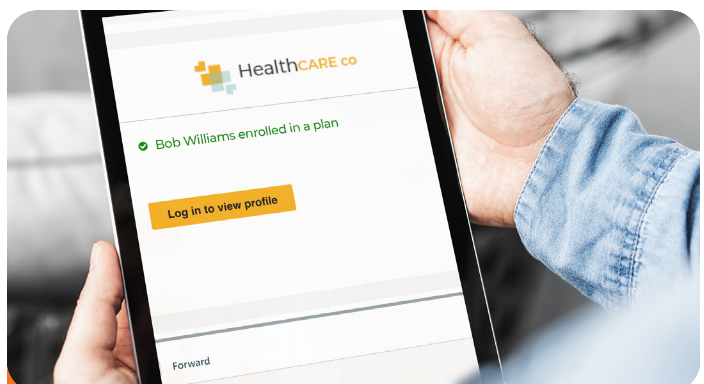


2. For security purposes, the beneficiary will receive two emails. The second email includes the authorization code necessary to view the quote.

3. Beneficiary will click the link from the first email and copy and paste the code from the second email into a landing page and click "view quote".



4. Beneficiary will review personalized plans to select their best fit plan and complete their enrollment electronically.



5. Agent will receive confirmation that beneficiary has enrolled in a plan.

Agent will always receive credit for the sale when sending a quote.