

# Agent Fast Quote Tool in SalesConnect

June 2022



MEDICARE



# SalesConnect Landing Page

- ▶ Under Medicare Plans > Click on **Create New Proposal**  
\* Spanish Flow available

SalesConnect Agent Portal

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[U65 Proposal](#)

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**Enterprise test13, Agent 009**  
TEST AGENCY ABC  
Agency-Agent ID 6201-009

## Individual & Family Plans

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## Medicare Plans

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## Tools

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GWC IST NEW 001 NF 062021



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# Create New Proposal

- You no longer need to create a complete Proposal to retrieve Medicare Products and Rates saving you time and clicks.
  - Note: In order to launch the Medicare Plan Wizard, Apply Now, Live Proposal etc. you will need to enter the required demographic data in Create New Proposal.
- At the bottom of the **CREATE NEW PROPOSAL** page complete the following steps under **Applicant(s) Details**:
  - ▶ Enter in **Gender**
  - ▶ Enter in **Date of Birth**
  - ▶ Enter in **Zip Code – County**
  - ▶ Enter **Tobacco Yes / No**
  - ▶ Click **Continue**

## Applicant(s) Details

**Tobacco User:** Refers to any usage of tobacco (e.g. cigarettes, cigars, pipes, snuff, or chewing tobacco) in the past 12 months.

Relationship	First Name	Gender	Date of Birth	Enter Zip Code - County	Used Tobacco in the Past?
Applicant		<input checked="" type="radio"/> Male <input type="radio"/> Female	12/01/1925	32203 - DUVAL	Yes

Cancel

Medicare Plan Wizard

Continue

# Review Proposal

Select the Product that you would like to retrieve the rate for your client

▶ Click **Medicare Advantage**, **Pharmacy** or **Medicare Supplement**

## Review Proposal

[View details](#)

The following products and plans have been added to your proposal based on your saved favorites and recommendations. You may add, remove, or change plans here before saving your proposal.

Medicare Plan Wizard

Have a member aging in from an U65 plan? Click on the button to the right to bring up a searchable tool enabling you to locate the member, see their top recommended plans, PCPs in network, Estimated Drug costs, Covered drugs and more! Please use this tool to personalize our member's sales journey, and provide you essential information to guide them into a Medicare plan.

Florida Blue Age In Recommendations

### Select Plans

[Actions](#)



Medicare Advantage



Pharmacy



Medicare Supplement

### Total Premium

\$0.00

(Proposal Amount)

Apply Now

Cancel

# Review Proposal - Select Plans

In this scenario we have selected Medicare Supplement Plans

► Click **Add Plans** if you need to add additional Med Supplement Plans

### Select Plans ⚙️ Actions



Medicare Advantage



Pharmacy



Medicare Supplement

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### Medicare Supplement Plan ⚙️ Actions

Effective Date:  ▼

Discounted Rates are available for Medicare Supplement Plans. You must choose which discounts to apply on the Plan List Page.\*

Plan Name	Monthly Premium	Actions
<input type="radio"/> <a href="#">BlueMedicare Supplement Select Plan C</a> <b>View/Add Optional Programs</b>	\$ 267.50	<a href="#">Remove</a>
<input type="radio"/> <a href="#">BlueMedicare Supplement Plan C</a> <b>View/Add Optional Programs</b>	\$ 271.00	<a href="#">Remove</a>
<input type="radio"/> <a href="#">BlueMedicare Supplement Select Plan B</a> <b>View/Add Optional Programs</b>	\$ 221.90	<a href="#">Remove</a>
<input type="radio"/> None		

**Add Plans**

### Total Premium

**\$0.00**  
(Proposal Amount)

**Apply Now**

**Cancel**

Want To Finish Later?

**Save Changes**

**REQUIRED Downloads**

[FloridaBlue Scope of Appointment Form \(PDF\)](#)

[FHCP Scope of Appointment Form \(PDF\)](#)

[Generate Scope of Appointment](#)

# Select Medicare Supplement Plans

- ▶ You will now see all the Medicare Supplement Plans and Product Rates offered in that county.

## Select Medicare Supplement Plans

Take advantage of convenience, security, and savings with our Automatic Payment Option (APO)

- **Convenience** - Have your premium automatically withdrawn from your checking or savings account monthly. You'll never have to worry about missing a payment.
- **Savings** - As well as saving 1.5% on your premium, you save time, postage and trips to the mailbox..
- **Security** - Only you can authorize the Automatic Payment Option. Plus, you can ensure your payment won't get lost in the mail.

**APO Discount:** You must choose the Monthly Bank Draft option during the application process to receive the discounted price. If you choose another method of payment, you will be billed at the regular price. The discount will not apply to the first month's payment..

To see the adjusted prices, just select the discount.

Automatic Payment Option (APO)

Show Favorites Only

Plan Name:

Showing 14 of 14 Plans

Favorite Plans	Select	Plan Name	Part A Deductible	Part B Deductible	Skilled Nursing Facility coinsurance	Physician Services	Monthly Premium
	<input type="checkbox"/>	<a href="#">BlueMedicare Supplement Plan L</a> Select to Compare	75%	Not Covered	75%	75%	\$145.80
	<input type="checkbox"/>	<a href="#">BlueMedicare Supplement Plan A</a> Select to Compare	Not Covered	Not Covered	Not Covered	100%	\$175.50
	<input checked="" type="checkbox"/>	<a href="#">BlueMedicare Supplement Select Plan B</a> Select to Compare	100%	Not Covered	Not Covered	100%	\$201.80
	<input type="checkbox"/>	<a href="#">BlueMedicare Supplement Plan N</a> Select to Compare	100%	Not Covered	100%	100%*	\$211.30
	<input type="checkbox"/>	<a href="#">BlueMedicare Supplement Plan B</a> Select to Compare	100%	Not Covered	Not Covered	100%	\$212.40