


PlanCompare Edge for Agents – Features Checklist

Feature	Description	
Agent Dashboard (reports, training materials)	Manage the day-to-day, access 360Learning agent training resources	✓
Agent Selling Permissions*	Pre-Loaded & Automatic based on NPN validation for participating carriers	✓
All Plan Types	MA, MAPD, PDP, MedSupp, Ancillary (DVH), Value-based Care	✓
All Plans View	See all plans, filter by plans licensed to sell and SNP plans	✓
Build a Medicine cabinet	Upload prescriptions automatically to ensure list is current and accurate	✓
Compare plans	Compare three plans side-by-side	✓
Expanded Enrollment Confirmation PDF	Documentation of an enrollment under special circumstances	✓
Health Cost Personalization	Identify costs based on utilization of services, see in-network plan costs	✓
Health Risk Assessment (based on carrier inventory)	Available to complete to evaluate a beneficiary's overall health and identify potential health risks	✓
Lower-cost therapeutic alternatives for off-formulary drugs	Find covered alternatives by medical condition. Find therapeutic alternatives during shopping, brand-to-brand options, not just generics	✓
Medicare & Medicaid Eligibility Validation	Confirm eligibility in real-time when shopping starts	✓
Multi-Year Plan View	Easy toggle between the most recent plan year and the next plan year	✓
Multiple Pharmacy Look-up	Search via visual maps, easy toggle to compare pricing	✓
Preferences (add and save)	Preferences include: Health status, Providers, Prescriptions, Pharmacy, Subsidy status	✓
Provider search	Search via map, filter by general practice, specialists and value-based care providers	✓
Quick Quote	Select three plans. Beneficiary can update their profile via quoting tool	✓
Scope of Appointment	Voice and Electronic - complete, add, upload and store safely online	✓

Feature	Description	
Send plans in a quote via text or email	The option of sending quotes via text and/or email	✓
Send to beneficiary via email or text for enrollment	The option of sending applications via text and/or email to enroll	✓
Shopping Link (Personalized URL)	Same Personalized URL every year, commissions tied to every enrollment	✓
Total Cost Estimate	See costs broker out by health, drug, drug phase, pharmacy, month and more	✓
Voice Signature for Scope of Appointment and Enrollment	Included, along with text and e-mail to enroll as well	✓

Optional Features include AgencyBloc and RetireFlo integrations. Both of these integrations require separate licenses from PlanCompare Edge for Agents and are additional costs (paid directly to those companies).

Note: PlanCompare Edge for Agents customers have a shared services support model.

Note: PlanCompare Edge (agencies version) is a unique site and will include ADMIN functionality not found in the PlanCompare Edge for Agents solution.

Important: Understanding the Carrier List for PlanCompare Edge for Agents on Connecture.com

*Selling permissions/plan access on PlanCompare Edge for Agents works differently than on other ConnectureDRX platforms. This carrier inventory is UNIQUE to PlanCompare Edge for Agents, regardless of your carrier permissions on any other ConnectureDRX platform you have used previously. [\(The carrier list is located on the PlanCompareEdgeforAgentsCarrierInventory page on the ConnectureDRX website and is updated on an ongoing basis\).](#)

Shop and View all Plans

- There are carriers that may NOT yet contracted to be on PlanCompare Edge for Agents for quote/enroll but agents can still see their plans
- Selling permissions will NOT appear for carriers under Shop and View plans, even if you have these permissions on other ConnectureDRX platforms via your FMO upline

Quote and Enroll

- These carriers are fully contracted with ConnectureDRX to shop, quote and enroll on PlanCompare Edge for Agents

√* Quote and Enroll

- Carriers marked with an asterisk are being onboarded, and selling permissions will be available once onboarding is complete