



## PlanCompare Edge for Agents – Features Checklist

**Active Analytics** included at no additional cost for AEP 2027.

Features	Description	
Active Analytics included	Visibility into plan discontinuations, drug formulary changes and cost increases (coming AEP 2027)	✓
AgencyBloc AMS+ Integration	Optional CRM Integration	✓
Agent Call Recording	Captures and calls phone conversations	✓
Account Overview	Houses profile pic, PURL, RetireFlo, contact info	✓
Agent Dashboard	Call-to-action tasks displayed	✓
All Plans View and Filter by Plans licensed to sell	All plans displayed with filtering capability	✓
Alternatives for Off-Formulary Drugs	Therapeutic equivalents, generic substitutes	✓
APIs (drugs, healthcare)	Secure data exchange between systems	✓
Ancillary: Dental, Vision, Hearing, Hospital Indemnity	Supplemental insurance options	✓
Build a Medicine Cabinet (via MyMedicare.gov, Blue Button)	Medications list on the platform	✓
Carrier data	Data sourced directly from carriers	✓
CRM Integration	AgencyBloc, Medicare PRO CRM	✓
Cross-sell ancillary plans	Complimentary products to boost sales & value	✓
Customer Support	Onshore support through Customer Ticketing System	✓
Digital Pharmacy Search	Including multiple pharmacy lookup	✓
Enrollment Confirmation	PDF confirmation of enrollment	✓
Enrollment Export	Downloadable file of enrollment data	✓
Health Cost Personalization	Tailor plan estimates per individual conditions	✓
Health Risk Assessments	Surveys to evaluate health status, risk, care needs	✓

Features	Description	
Hosted Solution	Software service run on external servers	✓
Medicare & Medicaid Eligibility Checks	Real-time verification of person's qualifications for Medicare & Medicaid	✓
MedicarePRO   CRM Integration	Optional CRM Integration	✓
Multi-Year Plan View	Display of plan options, costs over multiple years	✓
Multi-Plan Types View	MA, MAPD, PDP, MedSupp, Ancillary	✓
Personalized Quotes	Custom plan pricing based on personal needs, data	✓
Plan Cards	Highlights preferences, eligibility, etc.	✓
Plan List page	Comprehensive details about each plan	✓
Post-enrollment engagement	Custom messaging, HRAs	✓
Preferences (Health, Eligibility, Providers, Prescriptions, Pharmacies and more)	User-defined choices to tailor plan recommendations	✓
Pre-load beneficiary data	Auto populate beneficiary data to save time, personalize	✓
Private labelled (white-labelled) solution	Display your own company brand and logo	✓
Provider Search	Tool to find doctors, hospitals covered by plans	✓
PURL (Personalized URL Shopping Link)	Unique web link tied to an agent to track quotes/enrollments	✓
Reporting & Analytics	Track data to support insights, performance monitoring	✓
RetireFlo Survey	Bundled with PCEA, one platform, Bulk send, Super PURL	✓
Scope of Appointment (Voice and Electronic)	Beneficiary's permission to discuss specific plan types during a sales appointment.	✓
SNP (DSNP, CSNP, ISNP) plan filter	Filters to find (SNPs) based on eligibility like chronic or dual	✓
Text and Email to Enroll	Enroll clients quickly via text or email—fast, secure, compliant	✓
Text and Email to Quote Plans	Send plan quotes via text or email—quick and personalized	✓
Therapeutic Drug Database	Lower cost drug alternatives	✓
Total Cost Estimates	Estimated total annual costs, incl. premiums, copays, etc.	✓

Features	Description	
Value Based Care - provider search & post enrollment engagement	Rewards quality care and outcomes over service volume	✓
Voice Signature (Enrollment & Scope of Appointment)	Recorded verbal agreement in place of written signature	✓
360Learning Access (Agent Training)	Online platform for agent training and resources	✓

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

### Important: Understanding the Carrier List for PlanCompare Edge for Agents

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. (This list is updated regularly on <https://www.connecture.com/plancompare-edge-for-agents-carrier-inventory/>)

#### Quote and Enroll:

- Fully contracted carriers, ready to quote and enroll.

#### Shop & View Only:

- Plans visible, but not available for quote/enroll—even if you’re contracted elsewhere.