MedicareLINK

Why can't I see certain plans?

Always remember to begin every quote by clearing out the previous customer from active status and beginning a new session, if applicable. You'll know if this is possible if there is a personal code or someone's name displayed at the top of the page.

How do I know if an app has an error?

Right after you click submit, you'll be brought to a page stating either that the app was successful or stating the error that occurred. *Note: the "error code" shown in parenthesis is the enrollment code for the app.

You can click "Return to form" and correct the error with the customer, and they will sign the app again

You can also save & close, but remember to come back to it later since the app has not been submitted!

Why isn't an app in my carrier portal?

If an app is not on your book of business or you have not been paid, follow these steps, in order.

Check that there are no errors on the app and that the app was submitted successfully.

Check that it has been 10 business days since the app was submitted

Check that the member wasn't already enrolled in the same plan

Call the carrier's Agent Support Line to inquire. Sometimes the carrier will say "we have no record of the app" if the app was denied, so if they say that, you should ask the carrier if the app has been denied.

If none of these steps identify the issue, contact your manager.

Carrier processing times are often faster than 10 business days, but they are out of our control and depend on what is going on internally at the carrier and time of year. We send apps to the carriers daily, and in some cases instantaneously.

What if there's a typo on the app?

On the last page of all apps, we provide a summary where you can review the information entered with your customer. If you use a texted or emailed e-signature link, the customer can also review the app before signing.

If a typo on an app is found before submitting the app, edits can be made and the customer will need a new link to sign. See "How do I send a new link to e-Sign?"

If a typo is found on an app after submission, your manager needs to be notified as soon as possible. Once an app has been sent to the carrier, it cannot be changed via SunFire and you will have to contact the carrier to correct the typo.

How do I find C-SNPs?

If you are certified to sell C-SNP plans, you will find that an increasing number of C-SNP plans are offered through the SunFire tool. These plans are found, just like D-SNPs, by selecting the "Special Needs" plan type radio button.

What do I do if I get "Enrollment Form Not Found"?

If you get this error, retry viewing the enrollment form after trying each of these steps in order:

Click ok and try again

Confirm your internet connection is solid

Clear your cache

Ensure you're in the Chrome browser, our recommended browser

How do I send a new link to e-sign?

After you click "Send text" or "Send email" you'll see the "Send" button turns into a "Cancel" button (see screenshot below)

DO NOT click "End Enrollment" yet

Remain on the phone with the customer, ensure they can find the e-Sign request, and help them e-Sign if possible

If you need to send a new link to e-Sign or need to edit the app, click the "Cancel" button. Now you can select a new email/mobile number to send the e-Sign request to, or can go back and make any needed edits to the app

When ready, send the new e-Signature similar to how you did initially

Note that there will now be a new personal code shown, and the customer will have to use this new personal code to e-Sign this time

What if the customer has not received the e-Signature link?

Confirm the email/number to which the link was sent

Ask the customer if they have a good cell/wifi/internet connection

If sent via email, ask them to check their spam/junk folder

If none of that works, try sending a new link to a different number or email address (see "How do I send a new link to e-Sign?")

How do I find customer profiles?

To start, click "search prospects" from the dashboard, or click the prospects icon from the left menu (three people). Search by any field shown here: Last name, DOB, phone, or Disposition. We recommend searching by only one of these fields. You can search by partial last name if they are not coming up.

How do I delete duplicate customer profiles?

Customer profiles cannot be deleted as of now. As you get more comfortable with the tool, you'll find that accidental duplicate customer records are generated less and less often. We strongly recommend editing existing customer profiles when you would like to update their information, rather than creating new ones that can't be deleted. If you do create a duplicate customer record by accident, we recommend changing the "name" on the duplicate record to something like "null" or "void" so that it is not mistaken with the "real" Slim Shady. Another option is to set the disposition of the duplicate record to "Duplicate." See our post "Dispositions" for more on this.

How do I update customer disposition?

Dispositions are shown beside the customer's name in the active customer area of the page (near the top, see screenshot), as well as in search results when you search for them by last name.

How do I use the "Communications" feature on the Reporting tab?

If you navigate to your Reporting Tab and click "Communications" you'll be brought to the Communications tracker. If you send a customer a link to your purl ("Consumer") or a plan proposal email ("Proposal"), a record of when you sent the link and whom you sent it to will appear here. If the customer clicks on the link, the status will change to "Clicked." If after clicking the link they enroll in a plan, the status will change to "Enroll" and the enrollment code for the app will be shown in the right-most column, "Enrollment code."

How do customers edit their own drug list?

Customers can input their drug list (and health status, if they wish) themselves. Soon they'll be able to add/update their doctors, too. Using the method below, you'll be able to pull up everything they entered and confirm their selections as well as their zip code. They do so through you sharing a link to your pURL (if available).

Additional questions and answers can be accessed by visiting the FAQ section of MedicareLINK or by downloading the User Guide from the Learning Center.