

MEDICARE SALES ACADEMY

— SESSION 4 —

TECHNOLOGY & ENROLLMENT TOOLS

Using the right tools to quote, compare, enroll,
and support clients with confidence.



RESEARCH PLANS



VERIFY DETAILS



ENROLL ACCURATELY



FOLLOW UP

SESSION 4

TODAY'S ROADMAP

A practical journey through the technology and tools that power every successful Medicare sale.



Our goal today:
**CONFIDENCE
WITH THE TOOLS.
ACCURACY IN
EVERY STEP.**

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BEHIND A
MEDICARE SALE

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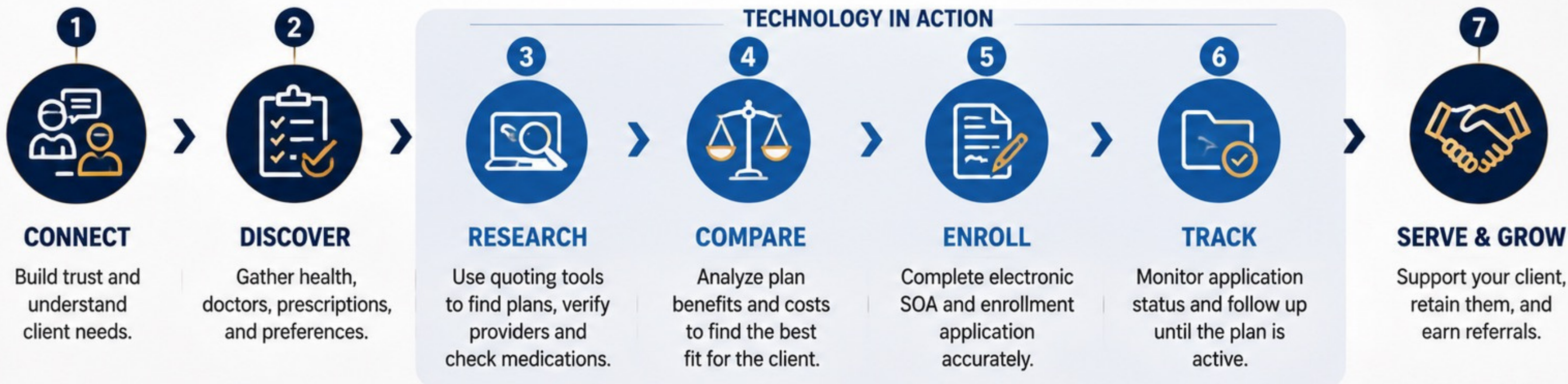
KEY TAKEAWAYS
& WHAT'S NEXT





WHERE TECHNOLOGY FITS IN THE MEDICARE SALES PROCESS

Technology doesn't replace the relationship—it empowers it.
Use the right tools at the right time to research, recommend, enroll, and support with confidence.



TECHNOLOGY SUPPORTS EVERY STEP.
YOU BRING THE RELATIONSHIP.



THE MEDICARE TECHNOLOGY WORKFLOW

A simple, repeatable workflow using the right tools helps you save time, stay compliant, and deliver the best plan for every client.



GATHER CLIENT INFORMATION

Collect health, doctor, prescriptions, and pharmacy details.



RESEARCH & VERIFY

Use tools to verify providers, check prescriptions, and review pharmacies.



QUOTE & COMPARE

Run plan results, compare benefits and costs, and find the best fit.



PRESENT & RECOMMEND

Review options with the client and make a confident plan recommendation.



COMPLETE SOA & ENROLL

Complete electronic SOA and the enrollment application.



SUBMIT & CONFIRM

Submit the application and confirm acceptance requirements.



TRACK & FOLLOW UP

Monitor application status and follow up until the client is active.



**ONE WORKFLOW.
THE RIGHT TOOLS.
BETTER RESULTS.**

- ✓ Save time
- ✓ Reduce errors
- ✓ Improve client experience
- ✓ Drive more successful enrollments



ADVANTAGE PLUS AGENT PORTAL

YOUR HOME BASE

Everything you need to manage your Medicare business and serve your clients — all in one place.



MANAGE

View commissions, track applications, access contracts and key documents.



MONITOR

See production, client activity and important performance reports.



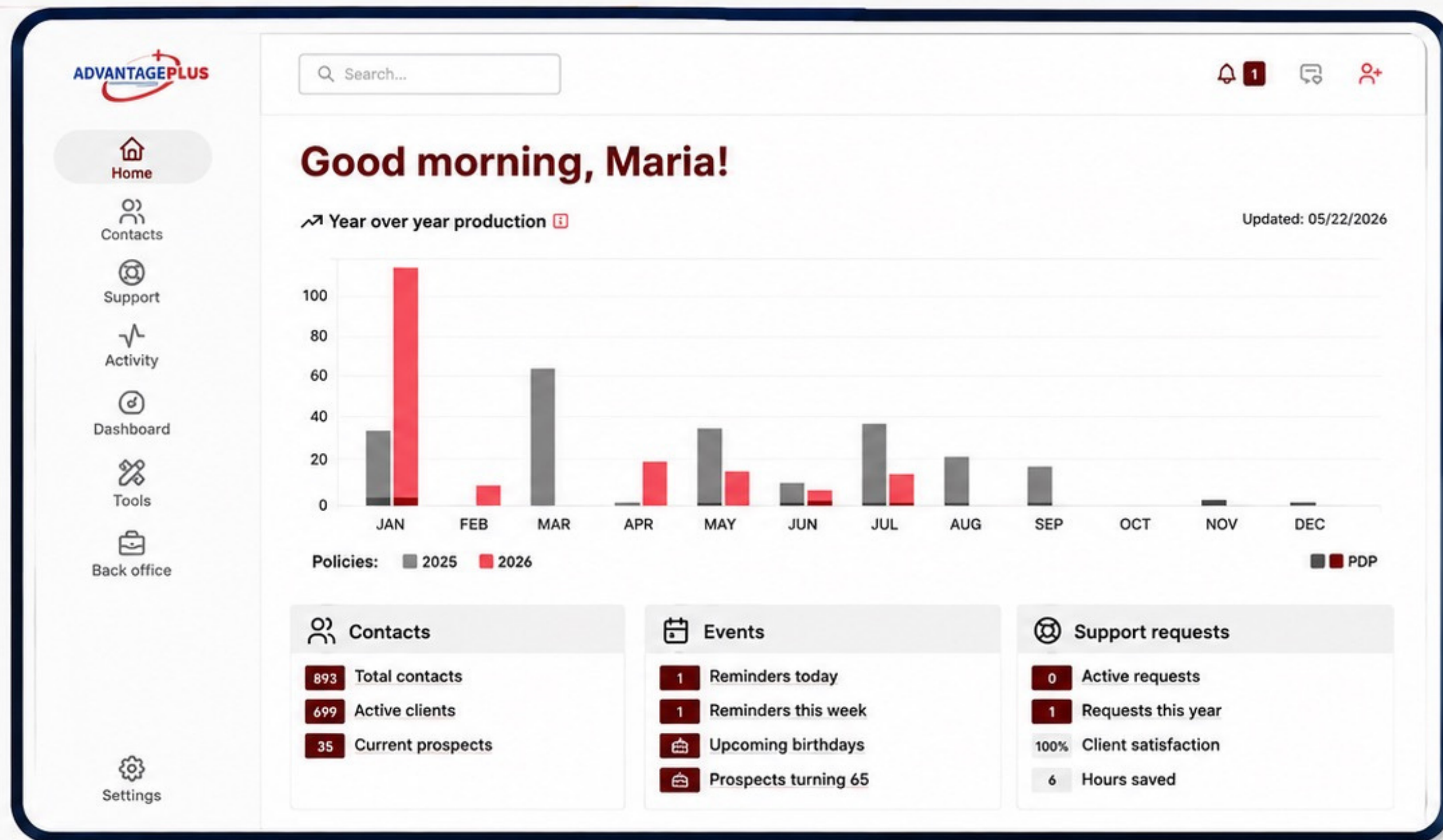
ACCESS

Training materials, marketing resources, certifications and helpful tools.



SUPPORT

Submit requests, get answers and stay connected with our team.





QUOTING & ENROLLMENT PLATFORMS

We use trusted technology to research plans, compare benefits, and complete secure electronic enrollments.

SUNFIRE (WALMART)



- Compare plans and benefits
- Verify providers and medical groups
- Research prescriptions and pharmacies
- Run side-by-side plan comparisons
- Start enrollments



BEST FOR:

Plan research, comparisons, and finding the right plan for your client.

ELECTRONIC ENROLLMENT (EEN)



- Complete Scope of Appointment electronically
- Submit enrollment applications to the carrier
- Secure and compliant
- Real-time application status and confirmations



BEST FOR:

Submitting applications and managing the enrollment process.



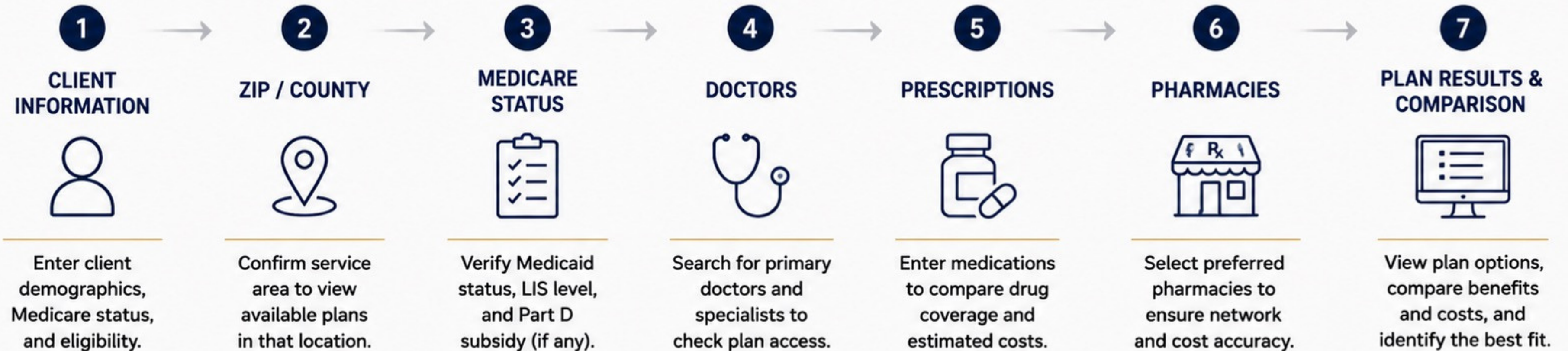
TIP: Use SunFire to research and compare.
Use EEN to capture your SOA and submit the enrollment.





SUNFIRE: FROM CLIENT INFORMATION TO PLAN COMPARISON

SunFire guides you step-by-step through the research process so you can find the right plans, confirm details, and build a confident recommendation.

**TIP:**

- Good data in = accurate results out.
- Take time to verify doctors, prescriptions, and pharmacies — every time.



PRESCRIPTION & PHARMACY RESEARCH

Accurate prescription and pharmacy information is critical to finding the right plan and avoiding surprises for your client.

PRESCRIPTION RESEARCH

- Enter all medications including dosage and frequency.
- Check if each drug is covered.
- See the tier and estimated cost for each medication.
- Review alternatives if a drug is not covered.

PHARMACY RESEARCH

- Search for your client's preferred pharmacy.
- Confirm the pharmacy is in the plan's network.
- Compare costs at preferred vs. standard pharmacies.
- Help your client choose the best option for savings and convenience.



Client Search

Plan Results

Plan Details

Prescriptions

Pharmacies

Providers

Compare Plans

Client: Jane Doe

Age: 68

County: Los Angeles, CA

Save & Exit

Prescriptions

Add your client's medications to see coverage and estimated costs.

+ Add Medication

Medication	Dosage	Frequency	Tier	Covered	Est. Monthly Cost	
Atorvastatin	10mg	1 tablet daily	Tier 1	Yes	\$4.00	...
Metformin HCL	500mg	1 tablet twice daily	Tier 1	Yes	\$0.00	...
Lisinopril	20mg	1 tablet daily	Tier 1	Yes	\$2.00	...
Apixaban (Eliquis)	5mg	1 tablet twice daily	Tier 3	Yes	\$47.00	...
Omeprazole	20mg	1 capsule daily	Tier 2	Yes	\$9.00	...

Preferred Pharmacies

Pharmacy	In Network	Preferred	Est. Total Monthly Cost	
CVS Pharmacy #1234	Yes	Preferred	\$62.00	Select
Walgreens #4567	Yes	Standard	\$74.00	Select
Rite Aid #8910	Yes	Standard	\$78.00	Select



PROVIDER & MEDICAL GROUP VERIFICATION

Verifying providers and medical groups ensures your client can keep the doctors they trust and avoid unexpected network issues.

PROVIDER VERIFICATION

- Search by provider name, specialty, or NPI.
- Confirm the provider is in-network for the specific plan.
- Check the effective date and network status.
- Review any limitations or notes.

MEDICAL GROUP VERIFICATION

- Search for the client's medical group or IPA.
- Verify the entire group is in-network.
- Confirm specialists and hospitals tied to the group.
- Reduce the risk of network surprises at the time of service.



Client: Jane Doe Age: 68 County: Los Angeles, CA [Save & Exit](#)

Client Search
Plan Results
Plan Details
Prescriptions
Pharmacies
Providers
Compare Plans

Providers

Search for a provider to verify network status.

Search by Name or Specialty or Search by NPI

[Search](#)

Provider Name	Specialty	Network Status	Group / Hospital	Effective Date	Details
John Smith, MD	Cardiology	In-Network	ABC Medical Group	01/01/2026	View Details

Medical Group / IPA

Group / IPA Name	Network Status	Specialists	Hospitals	Effective Date	Details
ABC Medical Group	In-Network	25	3	01/01/2026	View Details





10. PUTTING THE RESEARCH TOGETHER

All of your research comes together to help you compare plans side-by-side and recommend the best fit for your client.

- ☒ **Review plan details:**
Premiums, deductibles, copays, and benefits.
- ☒ **Confirm coverage:**
Providers, prescriptions, and pharmacies.
- ☒ **Compare total costs:**
Look at the full picture, not just the monthly premium.
- ☒ **Build your recommendation:**
Use the information to explain options with confidence.
- ☒ **Move forward:**
Once the client selects a plan, proceed with the enrollment.



Client: Jane Doe Age: 68 County: Los Angeles, CA [Save & Exit](#)

Client Search

Plan Results

Plan Details

Prescriptions

Pharmacies

Providers

Compare Plans

Plan Comparison

3 plans found

Plan Name	Plan A HMO	Plan B PPO	Plan C HMO
Monthly Premium	\$0.00	\$35.00	\$12.50
Deductible	\$0	\$250	\$0
PCP Copay	\$0	\$25	\$5
Specialist Copay	\$20	\$40	\$25
Prescription Drug Coverage	Yes	Yes	Yes
Est. Drug Cost (Monthly)	\$14.20	\$47.80	\$9.10
Primary Doctor	In-Network	In-Network	In-Network
Preferred Pharmacy	In-Network	In-Network	In-Network
Est. Total Monthly Cost	\$14.20	\$82.80	\$21.60



11. PLAN COMPARISON: TECHNOLOGY SUPPORTS THE RECOMMENDATION

Technology gives you the facts.
You provide the guidance.

- ☒ **Side-by-side view**
See the key benefits and costs that matter most.
- ☒ **Clear differences**
Quickly spot the strengths and trade-offs.
- ☒ **Confident recommendation**
Use accurate information to explain why a plan fits their needs.
- ☒ **Better client experience**
Saves time, builds trust, and improves outcomes.

SunFire Client: Jane Doe Age: 68 County: Los Angeles, CA 3 plans found			
Plan Details	Plan A HMO	Plan B PPO	Plan C HMO
Monthly Premium	\$0.00	\$35.00	\$12.50
Deductible	\$0	\$250	\$0
PCP Copay	\$0	\$25	\$5
Specialist Copay	\$20	\$40	\$25
Annual Out-of-Pocket Max	\$4,500	\$6,700	\$4,000
Prescription Drug Coverage	Yes	Yes	Yes
Est. Drug Cost (Monthly)	\$14.20	\$47.80	\$9.10
Your Doctors In-Network	3 of 3	3 of 3	2 of 3
Preferred Pharmacy In-Network	Yes	Yes	Yes
Est. Total Monthly Cost	\$14.20	\$82.80	\$21.60



12. ELECTRONIC SCOPE OF APPOINTMENT

Secure electronic Scope of Appointment (eSOA) captures permission quickly and keeps a clear record.



Compliant & secure

Meets CMS requirements for permission and documentation.



Easy for clients

Simple electronic signature on any device.



Saves time

Capture the SOA in minutes, not days.



Stored automatically

The eSOA is saved with the client's record for easy access.



Tracks what you can discuss

Clearly shows the products and information you're authorized to review.

Scope of Appointment (SOA)



Client Information

Client Name	DOB	Date
Jane Doe	05/14/1956	05/22/2026

Permission to Discuss

By signing below, I acknowledge that I have a meeting with the agent listed below. I give permission for this agent to discuss the products checked below.

- ☒ Medicare Advantage Plans
- ☒ Medicare Prescription Drug Plans
- ☐ Medicare Supplement Insurance (Medigap)
- ☐ Other Insurance Products

Agent Information

Agent Name	NPN
Maria Gomez	12345678

Client Signature (eSignature)

Jane Doe

Clear

Date Signed

05/22/2026





13.

STARTING AN ELECTRONIC ENROLLMENT

Once the plan is selected and the SOA is signed, you can begin the electronic enrollment.



CLIENT INFORMATION

Review the client's details and confirm accuracy.



PLAN CONFIRMATION

Verify the selected plan, effective date and benefits.



COMPLETE APPLICATION

Answer any remaining questions and review forms.



SUBMIT ENROLLMENT

Submit electronically and receive confirmation.

The screenshot shows the SunFire electronic enrollment interface. At the top, it displays client information: Client: Jane Doe, Age: 68, County: Los Angeles, CA, and a Save & Exit button. The main heading is "Enrollment" with a subtext "Please review and complete the following information." Below this is a progress bar with four steps: 1 Client Information (active), 2 Plan Confirmation, 3 Application, and 4 Review & Submit. The "Client Information" section contains several input fields: First Name (Jane), Last Name (Doe), Date of Birth (05/14/1956), Gender (Female), Phone Number ((555) 123-4567), Email (jane.doe@email.com), and Address (123 Main Street, Los Angeles, CA 90001). A "Start Enrollment" button is located on the left sidebar, and a "Continue" button is at the bottom right of the form.



KEY TAKEAWAY

Technology makes enrollment faster and easier so you can focus on your client.

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COMPLETING THE APPLICATION CORRECTLY

Accurate information leads to faster approval, fewer delays, and happier clients.



ANSWER EVERY QUESTION

Complete all required fields. Incomplete applications can cause delays or denials.



USE ACCURATE INFORMATION

Verify names, dates, Medicare numbers, and contact details.



ATTACH REQUIRED DOCUMENTS

Ensure all requested documents are clear and legible.



REVIEW BEFORE SUBMITTING

Double-check all entries and confirmations before final submission.



Client: Jane Doe Age: 68 County: Los Angeles, CA [Save & Exit](#)

Client Search

Plan Results

Plan Details

Prescriptions

Pharmacies

Providers

Compare Plans

Start Enrollment

Application

Please complete all required information.

1 Client Information — 2 Plan Confirmation — 3 Application — 4 Review & Submit

Medicare Information

Medicare Number: 1EG4-TE5-MK72 Medicare Effective Date: 05/01/2018

Health Information

Currently use tobacco products? ☐ Yes ☒ No End Stage Renal Disease (ESRD)? ☐ Yes ☒ No

Authorization

☒ I authorize the plan to obtain and release information as needed to process this application.

[Back](#) [Continue](#)

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FINAL REVIEW BEFORE SUBMISSION

A few minutes of review now
can prevent days of delays later.



CLIENT INFORMATION

Verify names, dates of birth, Medicare number, and contact details.



PLAN & BENEFITS

Confirm the selected plan, effective date, and all benefit details.



APPLICATION ANSWERS

Review all responses for accuracy and completeness.



ATTACHMENTS

Ensure all required documents are attached and easy to read.



AUTHORIZATIONS

Confirm SOA and consent signatures are complete.



READY TO SUBMIT

Everything looks good? Submit with confidence.



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AFTER SUBMISSION: WHAT HAPPENS NEXT?

Once the enrollment is submitted, the plan and SunFire work behind the scenes to process the application.

1. CONFIRMATION

You and your client will receive confirmation that the enrollment was received.

2. PROCESSING & REVIEW

The plan reviews the application and verifies information.

3. FOLLOW UP (IF NEEDED)

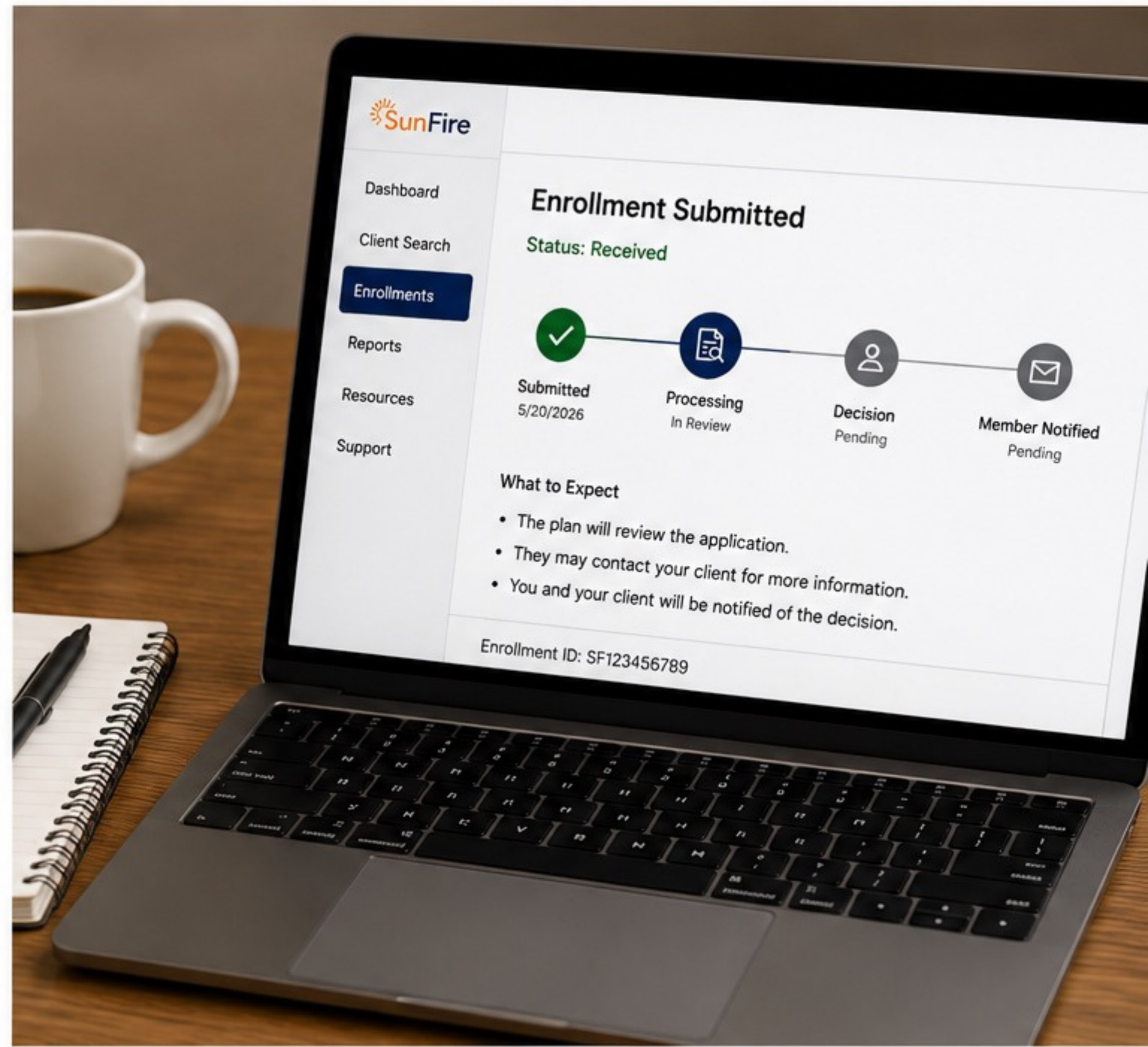
The plan may contact the client for additional information.

4. DECISION & NOTIFICATION

The plan makes a decision and sends an approval or denial notice.

5. WELCOME & MEMBER ID

If approved, the client receives their welcome materials and ID card.



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TRACKING APPLICATIONS & CLIENT FOLLOW-UP

Consistent follow-up builds trust, prevents delays, and helps you close more business.



TRACK IN REAL TIME

Use your enrollment system to monitor status and stay updated at every stage.



SET UP ALERTS

Enable notifications for status changes, requests for information, and decisions.



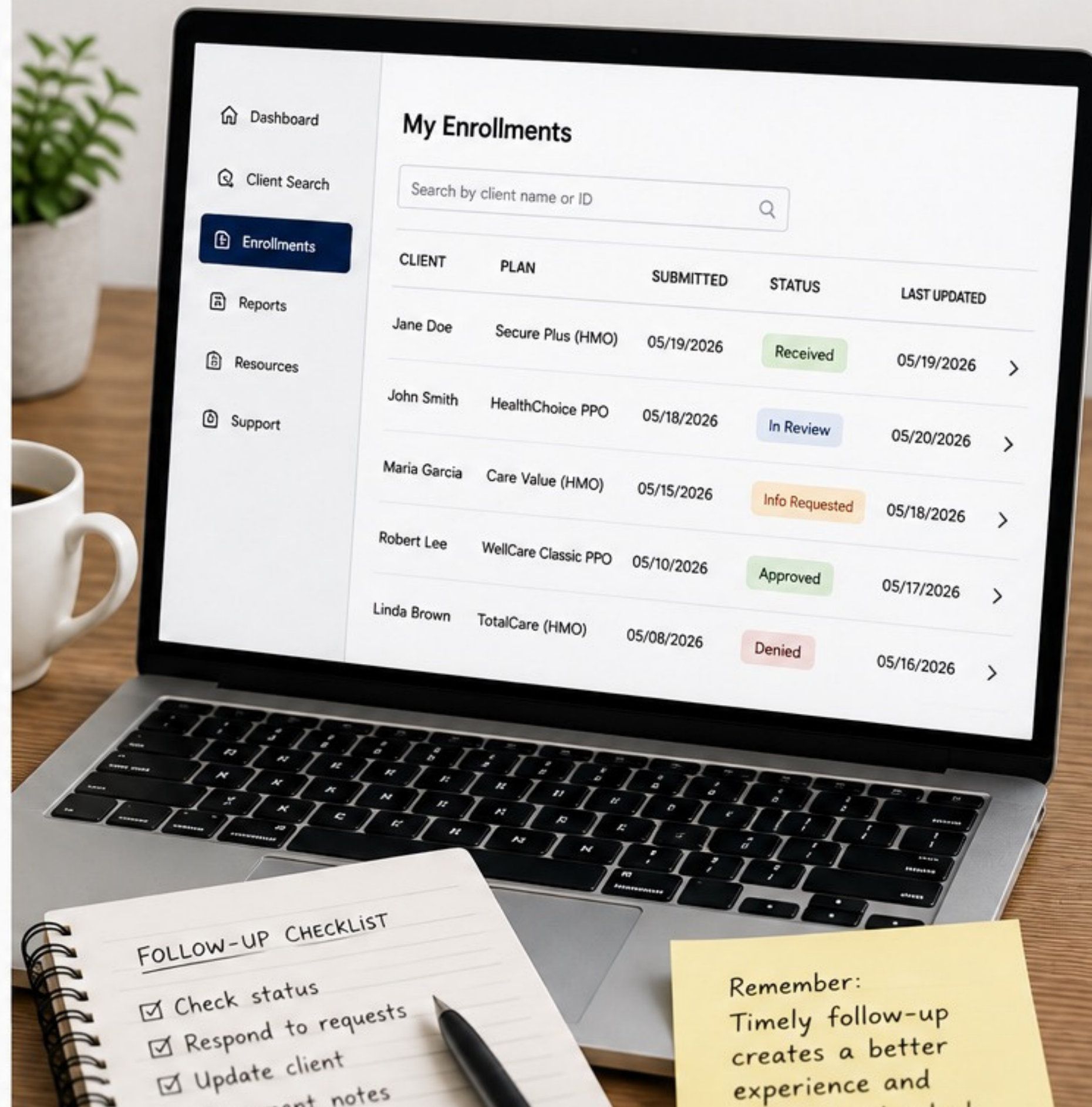
FOLLOW UP PROMPTLY

Respond quickly to plan requests to keep the process moving.



KEEP CLIENTS INFORMED

Communicate progress and next steps to keep clients confident and engaged.



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COMMON TECHNOLOGY & ENROLLMENT MISTAKES

Avoiding common errors helps ensure a smooth enrollment and faster approvals.

MISTAKES TO AVOID

- ✗ Missing SOA
- ✗ Incorrect plan selection
- ✗ Incomplete data
- ✗ No call recording
- ✗ Not reviewing before submission



REMEMBER: Accuracy, compliance, and attention to detail create a better experience for your clients and fewer headaches for you.



INCORRECT OR INCOMPLETE DATA

Typos or missing information can cause delays or denials.

TIP:

Double-check all client information before submitting.



MISSING DOCUMENTS

Missing SOA, signatures, or disclosures can result in the application being rejected.

TIP:

Use SunFire checklist and keep all documents in the file.



NOT USING ELECTRONIC SOA

Paper SOAs slow down the process and may not meet compliance requirements.

TIP:

Always complete the electronic SOA first.



FORGETTING TO RECORD THE CALL

Unrecorded calls are a major compliance risk.

TIP:

Start recording at the beginning of every enrollment call.



NOT REVIEWING BEFORE SUBMISSION

Small errors can lead to rework and unhappy clients.

TIP:

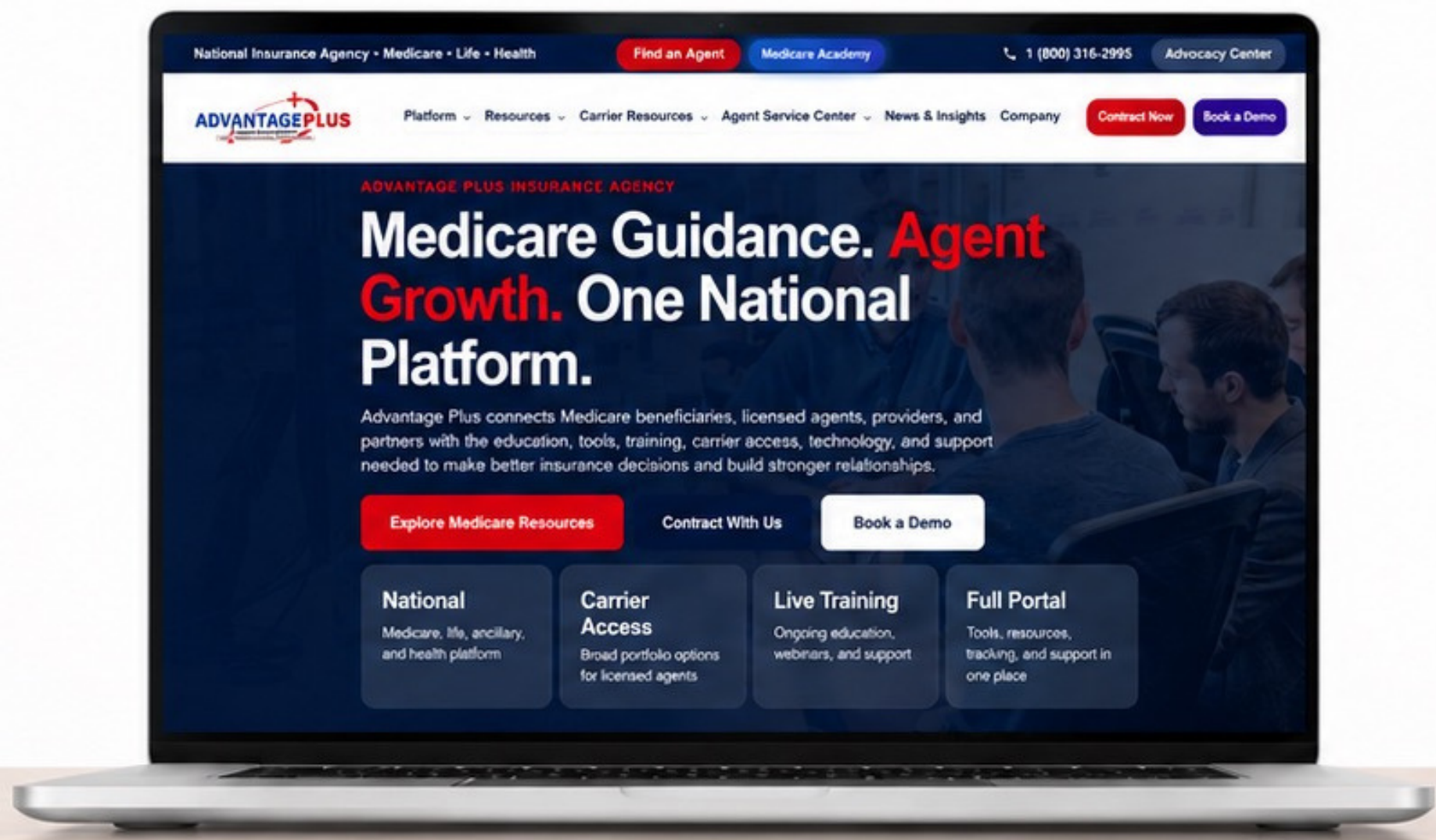
Review the entire application with the client before submitting.

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EVERYTHING YOU NEED. ALL IN ONE PLACE.

Visit www.AdvantageMedicareOptions.com

Your one-stop resource hub for tools, training, and support to grow your Medicare business.



BOOKMARK OUR WEBSITE

Check back often—new tools, resources, and training are added regularly!



**POWERFUL RESOURCES.
BUILT FOR AGENTS.**



FIND AN AGENT

Connect clients with trusted agents across the country.



CERTIFICATION HUB

AHIP, carrier certifications, and training resources.



AGENT STORE

Order business cards, name tags, marketing materials, and more.



CARRIER RESOURCES

Carrier directory, release center, and important updates.



AGENT TOOLKIT

Forms, guides, checklists, and helpful templates.



COMPLIANCE & E&O

Free E&O, compliance center, and important guidelines.



MEDICARE LEARNING CENTER

Educational resources to help you and your clients.



EVENTS & MARKETING

Find events, request materials, and marketing support.



PRESCRIPTION SAVINGS CENTER

Tools and resources to help clients save on prescriptions.



AGENT SUPPORT

Submit requests, get help, and stay on track.



Better resources. Stronger support. Bigger success.

Explore everything available to help you grow with Advantage Plus!

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SESSION 4 KEY TAKEAWAYS + SESSION 5 PREVIEW

You've learned the tools. Now keep building your skills and get ready for what's next.



TOOLS THAT EMPOWER YOU

From SunFire to call recording and tracking, the right technology helps you work smarter and faster.



ACCURACY CREATES SUCCESS

Completing applications correctly and documenting everything ensures faster approvals and happier clients.



COMPLIANCE PROTECTS EVERYONE

Following CMS, carrier, and agency guidelines keeps you protected and builds trust.



FOLLOW UP & COMMUNICATE

Tracking applications and staying in touch with clients leads to better outcomes and long-term relationships.



CONTINUOUS IMPROVEMENT

Avoid common mistakes, use the resources available, and never stop learning.



GREAT WORK!

You've taken another important step toward becoming a top producing Medicare agent.

Coming Up Next:

SESSION 5

MARKETING & LEAD GENERATION FOR MEDICARE SUCCESS

*Learn proven strategies to attract leads,
build your pipeline, and grow your business.*



TUESDAY

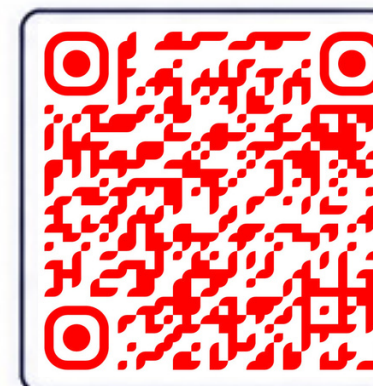
AUGUST 18TH



4:00 PM PT

RESERVE YOUR SPOT!

Scan the QR code
to register for Session 5.



*Scan
to
Register!*

Keep learning. Keep growing. Keep succeeding!