



MASTERING MEDICARE

IntegrityCONNECT™

Built by Agents for Agents

COURSE 06

An all-in-one platform to save time, stay compliant, and sell more.

myicbn.com

888-341-4314

These materials are for Medicare Insurance Broker training only and are not intended for client use.



IntegrityCONNECT™

- **Organize and Prioritize**
- **Communicate Effectively**
 - Agent-personalized website
 - Built-in calls and texting
- **One Platform, Multiple Products**
 - Access to multiple products & carriers
 - One login
- **Built for compliance**
 - Features like meeting summaries
 - Scope of Appointment tracking

Walk Through



1. Agent & Account Information

1. Setting up personal information
2. Password reset
3. Recorded line phone number
 1. If you used an 800 number when signing up for Integrity.com, a phone number will not be generated for you.
4. Selling permissions
 - Keep track of your selling permissions and product preferences, making sure the right carriers and plans display when you quote a client
 - Monitor your contract status with your carriers so nothing falls through the gaps.
5. PAW | Purl – Personalized Agent Website
 - Manage your public profile and contact information

Walk Through



2. Contact Management

Stay on top of every relationship with built-in reminders, detailed activity logs, and client notes.

1. Creating a client profile

You must enter the client's first name, last name and either an email address or phone number. All other fields are optional.

2. PTC | Scope of Appointment

3. Profile updates

4. Document uploads

5. Texting

Text messages must be 160 characters or less. If you need to send a message longer than 160 characters, please break it into multiple texts.

6. Tags & Filters

Use customizable and automated tags, along with built-in stages, to track where clients came from, where they are in the sales process, and what you need to do next.

6. Plan Cards

7. Ask Integrity® Digital Assistant

Leverage the Ask Integrity Digital Assistant for detailed client summaries, recommended actions, and more.

Walk Through



3. Quote and eApp

Quote and enroll multiple products for multiple health and life carriers through a powerful and easy eApp process.

1. Dual Eligibility lookup
2. Filters
3. Quotes populate based on prescriptions, providers, and pharmacies tied to the client record.
4. Applications prefill with data from the client record, saving time and reducing errors.
5. ASK Integrity
 - Ask Integrity Shoppers and Instant Insights
 - Ask Integrity Client and Call Summaries

Not going to cover today



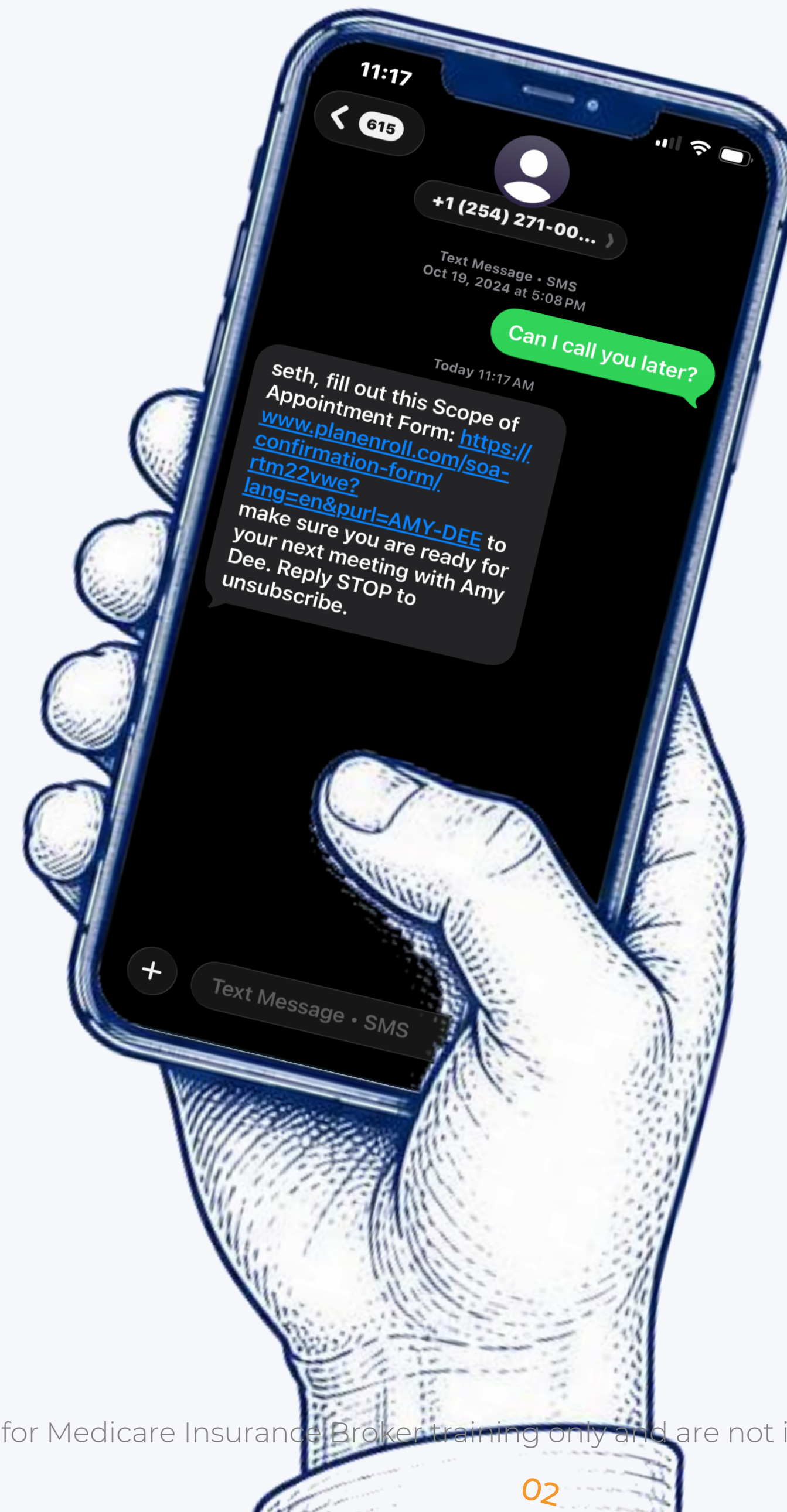
Connecting with Clients – Marketing Tools

Stay connected with clients in a compliant, consistent, and personalized way using built-in marketing and communication tools.

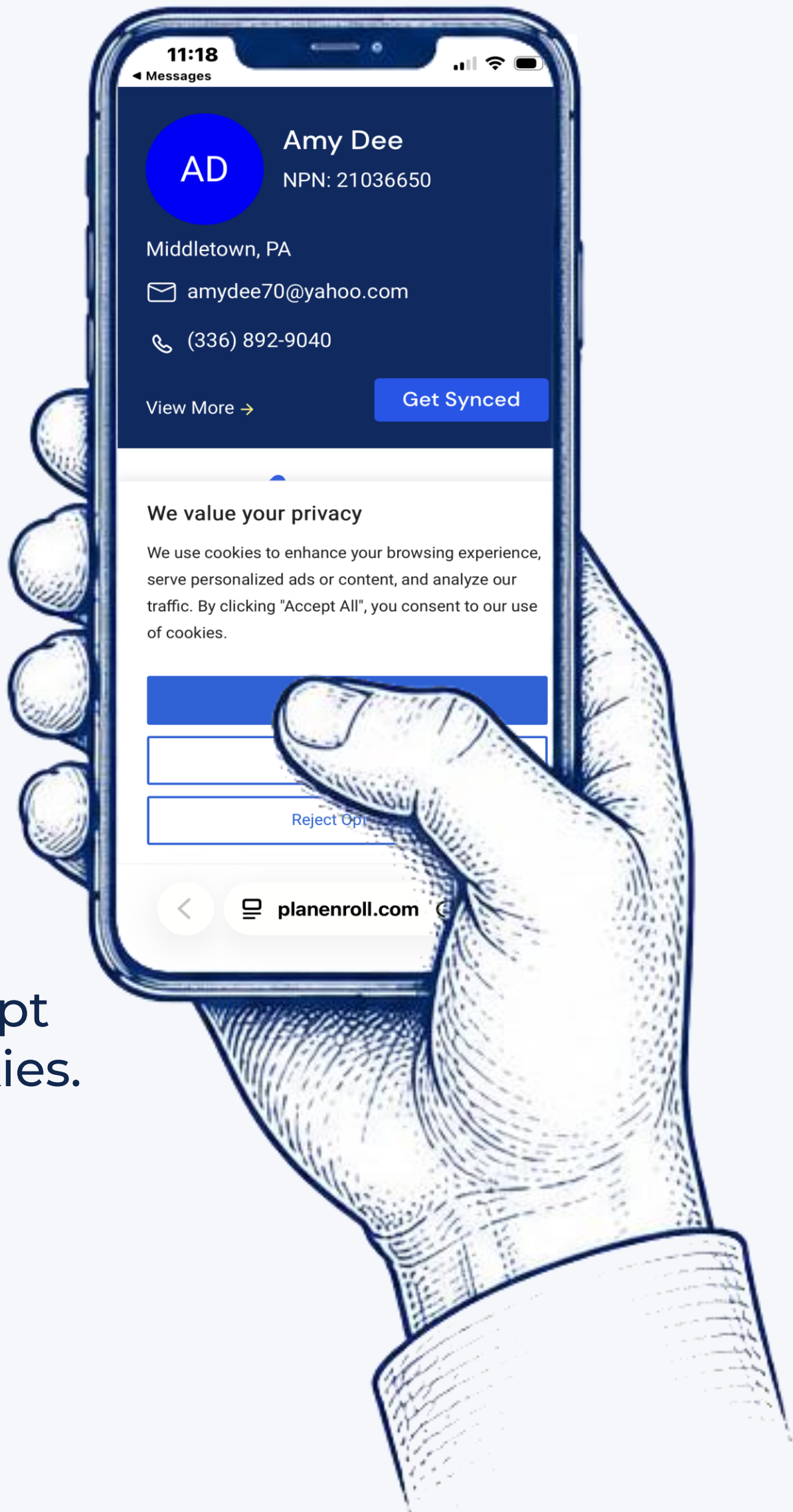
- Send and receive compliant phone calls and text messages, storing all communication for you to reference when needed.
- Use Automated Marketing to send bulk updates, requests, and reminders.
- Collect up-to-date health information from clients through the Client Sync tool, letting your clients review and update their prescriptions, providers, and pharmacies on their own.
- Set up your own branded Agent-Personalized Website, where clients can quote products, create accounts, and connect with you.

Text: SOA

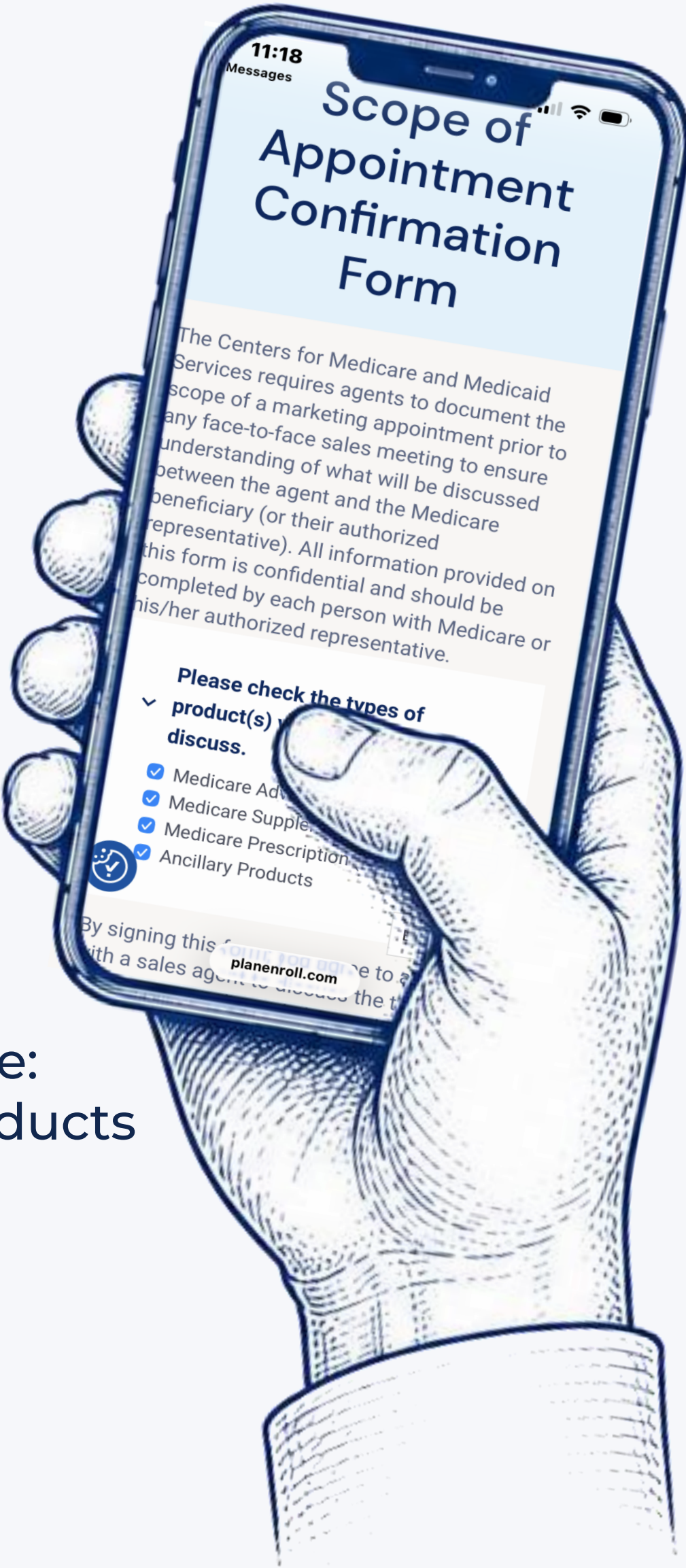
YOU HAVE . . .
RECEIVED TEXT.
CLICK THE LINK.



Text: SOA



Accept Cookies.



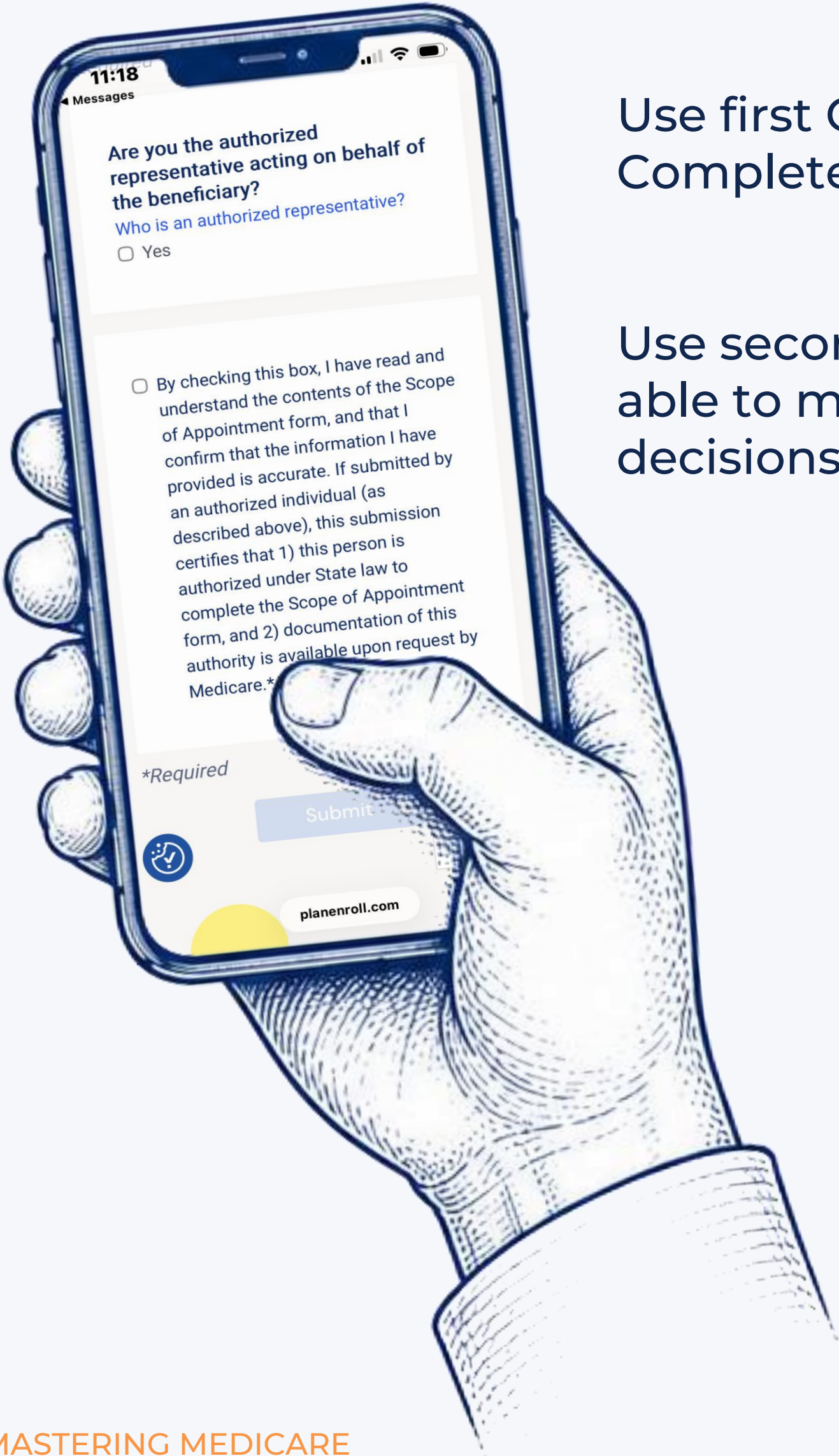
Read SOA.

Best Practice:
Keep all products
selected.



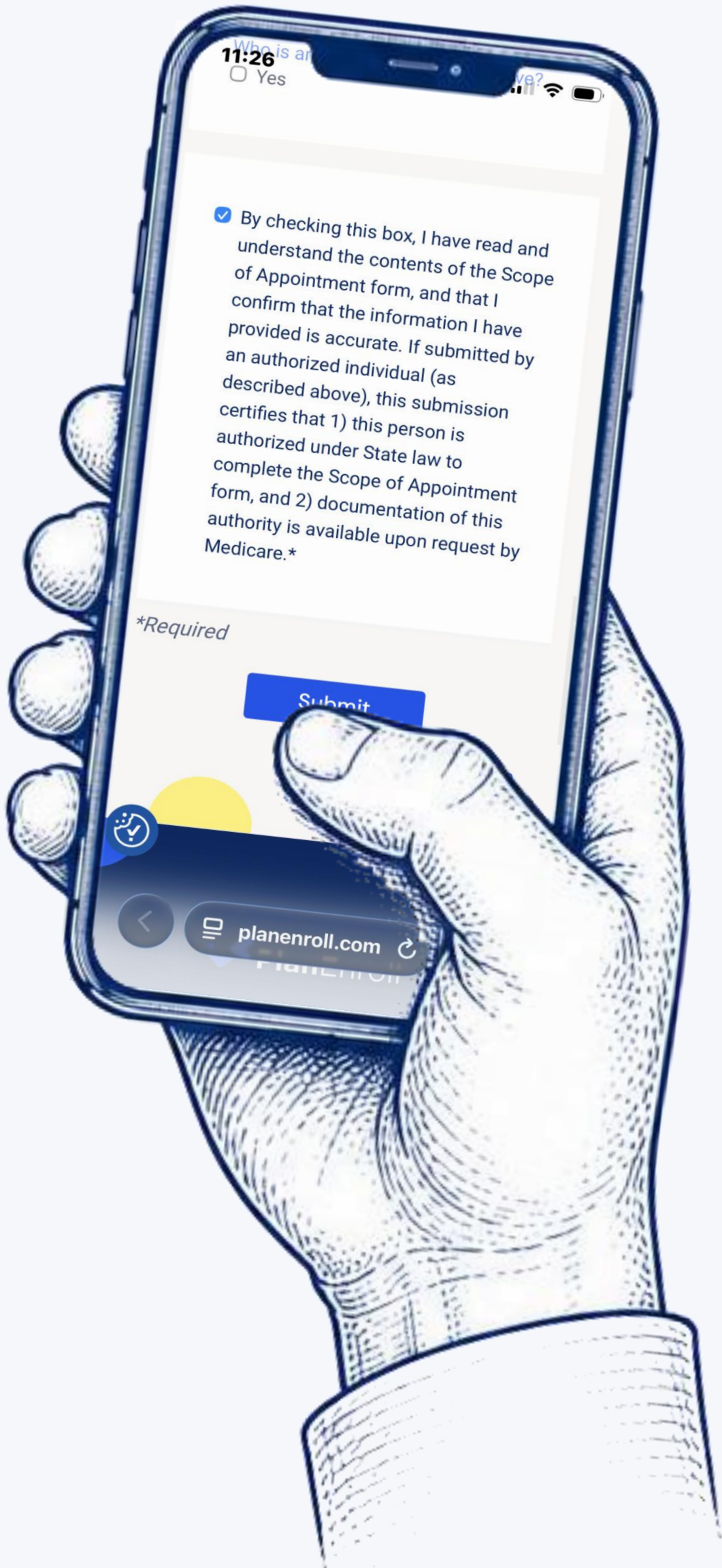
Contact information
is pulled from your
Client Profile. Confirm
info is correct or have
missing details added in.

Text: SOA



Use first Checkbox if POA.
Complete contact details.

Use second Checkbox if
able to make healthcare
decisions for themselves.



Submit button
turns darker blue
when active.
Submit form

Contact Stages



List of Contact Stages and Automated Stage Changes

Contact Stages follow a progression, moving from New to Loyal as your relationship with the client develops.

IntegrityCONNECT automatically moves clients through these stages as you complete key actions with the contact record.

You can always manually move stages as well using the instructions above.

→Tip: Stages will automatically progress forward but will not move backwards unless you manually change them.

Contact Stages



New

- The default value for contacts that are added to Integrity.

Contacted

Contacts that you have communicated with.

A contact will automatically move to **Contacted** when:

- An incoming call is recorded.
- An outgoing call is recorded.
- A Scope of Appointment is sent to the client.

Engaged

These are contacts that have yet to enroll but have taken steps towards enrolling.

A contact will automatically move to **Engaged** when:

- They have signed a Scope of Appointment.
- You have shared a quote or plan comparison with them.
- They have completed the Client Sync process.

Contact Stages



Client

These are clients that have one or more active policies associated with them through Policy Management.

A contact will automatically move to **Client** when:

- A policy associated with them is in an active status.

Retained

These are clients that have renewed their policies with you.

A contact will automatically move to **Retained** when:

- A Health Policy has one annual renewal.

Loyal

These are clients that have stayed with you for multiple years.

A contact will automatically move to **Loyal** when:

- A Health Policy has three years of renewals, plus an existing active policy.

Lost

This stage can only be set by you. After setting the Contact's stage to Lost, you can choose from a list of reasons the Contact was lost.

- Deceased
- Already enrolled
- Do Not Call
- Incentivized
- Incorrect contact data
- Never requested Information
- _____

IntegrityCONNECT PRACTICE SCENARIOS



Goal:

Use
IntegrityCONNECT
to get to a sale.

Scenario 1 – Walk-In:

Client: John L Smith

DOB: 05/08/1955

Pick the zip code in the town where you sell
Use your Personal Phone number
Use your Personal Email Address
Scan FAKE Medicare ID card
Enter in a Primary Care Physician in your area
and one other specialist you are aware of

Currently Taking Prescriptions:

- Atorvastatin 20 mg 1 per day
- Metoprolol ER 50 mg 1 per day
- Gabapentin 300 mg 3 per day
- Simvastatin 20 mg 1 per day

Prepare for the appointment today by
sending a scope of appointment to yourself...
and complete it.

Run a quote to figure out which plans cover
all these Prescriptions and the two doctors
you selected.

IntegrityCONNECT PRACTICE SCENARIOS



Goal:

Use
IntegrityCONNECT
to get to a sale.

Scenario #2 – Call-In:

Client: Laurie Walker

DOB: 11/22/1959

Use the same zip code as husband

Use your same personal phone number

Use your same personal email address

Enter Medicare ID number: 6bb7bb8bb45

Part A: 11/01/2024

Part B: 11/01/2024

Enter in an internal medicine doctor you have never heard of in your area

Currently Taking Prescriptions:

Trazodone 300 mg 2 per day

Furosemide 20 mg 1 per day

Fluoxetine 40 mg 1 per day

Omeprazole 20 mg 1 per day

Prepare for the appointment today by sending a scope of appointment to yourself... and complete it.

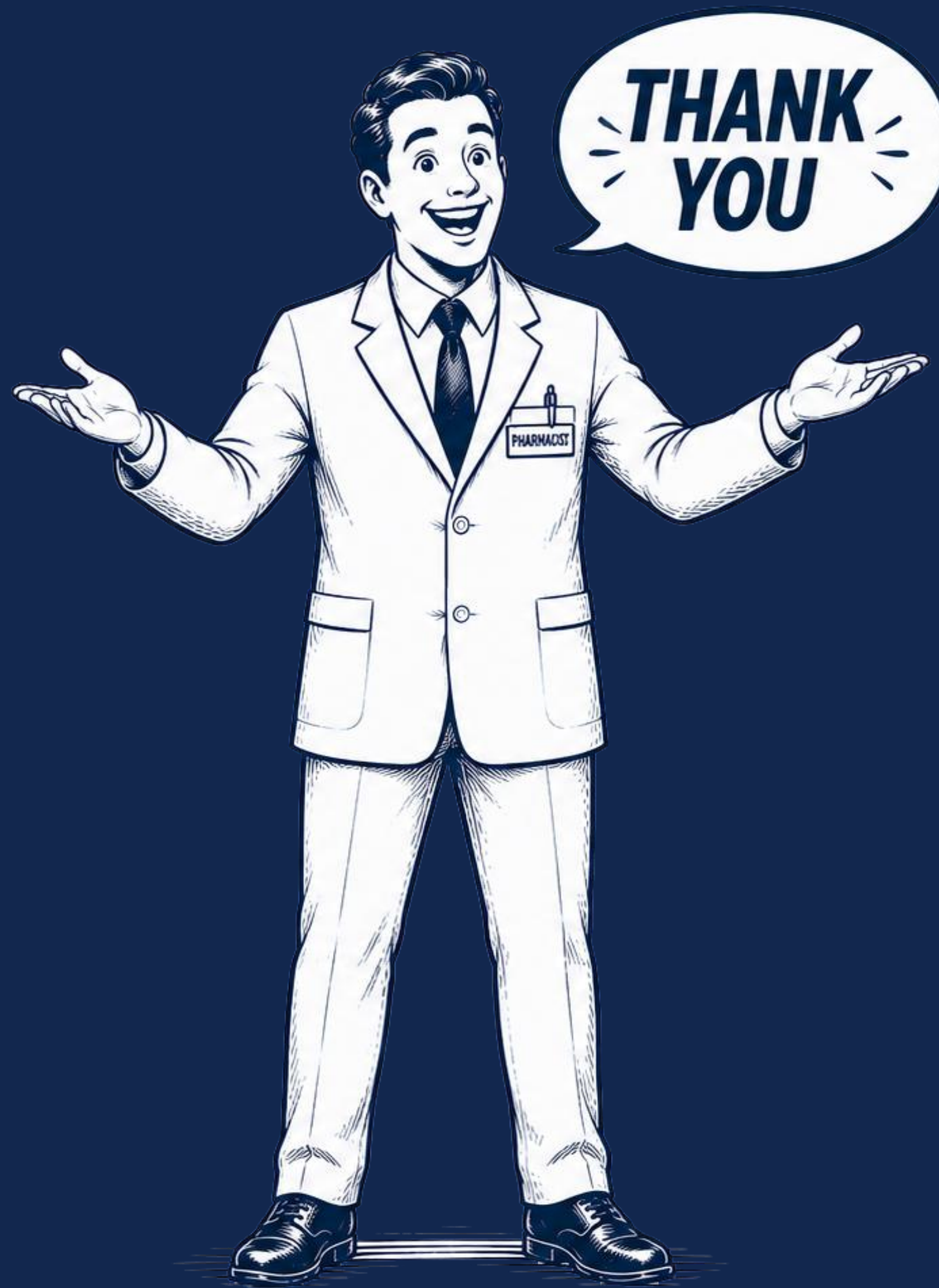
Run a quote to figure out which plans cover all these Prescriptions and the two doctors you selected.



Note your questions and be prepared to ask them

How did you find your experience?

Let us know how you did?



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