TSP 2 Session AEP 2024 Training Agenda

Session 1

Beneficiaries……………………………………………………………...…….15 minutes
- Beneficiary List
    - Filters (NEW! APPLICATION ID FILTER)
    - Exporting Book of Business (NEW! ABILITY TO EXPORT)
- How to enter a single beneficiary
    - Entering medications, pharmacies, doctors

Running a Quote…………………………………………………...………..25 minutes
- Filters & Sorting
- Med Supp, MAPD, PDP
    - Part D Details Page (NEW! PAGE REDESIGN)
    - MAPD Benefits Page

Plan Comparisons & Recommendation………………………………………….10 minutes
- Printing & Emailing
- Comparing 2 Plans

Beneficiary Profile……………………………………………………….…..10 minutes
- Demographic Data
- Beneficiary Details
- Notes, Activity, Documents
- Pharmacy, Provider, Medications
- Exporting Beneficiary Details (NEW! ABILITY TO EXPORT)

Session 2

Blue Button………………………………………………………….…..15 minutes
- Blue Button POA
- Blue Button Data Import
- Medication Update Email- what the beneficiary sees
- Blue Button import from the beneficiary profile

SOA………………………………………………………………………..10 minutes
- eSignature - Sending to your client
    - Email
    - Text (NEW! TEXT SOA)
- Uploading

Instant Plan & RX Review……………………………………………………10 minutes
- Starting a batch for all or some
- Batch send recommended flow (no plan, new plan, stay in plan)
- Comparing plans from the recommendation

Direct Enrollment……………………………………………………….…..15 minutes

- Ready to Sell form
- Submission Types
- What happens after submission
  - Beneficiary List status'
  - When an app is sent to carrier
  - Email confirmation to the broker
- Completing the HRA

Support & Training Resources……………………………………………………10 minutes
- Review Onboarding Site
- Review Customer Support Portal