



**PlanEnroll is a consumer-facing platform that helps people feel confident in their Medicare choices — and delivers the positive, straightforward experience they deserve.**

Consumers are empowered to learn, explore, compare and enroll in the right Medicare plan for them. And they can get help in whatever way they prefer — online, over the phone or in person with a local network agent.

### **PlanEnroll Network Agents — Connecting Consumers to Agents Like You**

PlanEnroll Network Agents can:

- Connect to consumers through their Personal Agent Website and receive credit for client enrollments
- Receive live calls or data leads through a LeadCENTER PlanEnroll Realtime campaign
- Access exclusive leads driven by PlanEnroll national marketing efforts
- Be seen as a prioritized listing in the local Agent Selection Map on PlanEnroll.com

When consumers want a trustworthy and human experience with their Medicare decision, PlanEnroll — and agents like you — are there to help.

**It's time to differentiate yourself by becoming a PlanEnroll Network Agent.**

## How to become a PlanEnroll network agent — and get the most from PlanEnroll

### Step 1

If you already have a Personal Agent Website through MedicareCENTER, you're almost set! Just make sure you log in to MedicareCENTER so the software knows you are active.

If you do not have a Personal Agent Website through MedicareCENTER, here's how to get started:

1. Log into MedicareCENTER.
2. Click your name in the upper right-hand corner, then select "Account."
3. Click to copy your Personal Agent Website link so you can use this in your marketing and client outreach communications.
4. Keep logging in to MedicareCENTER during your day — that's how the software knows you are active and available to take calls and callback requests.

### Step 2

Next, become a PlanEnroll Network Agent by going to [Training.PlanEnroll.com](https://Training.PlanEnroll.com). There, you will register and complete the training videos, as follows:

- Register for the training site by putting in your first name, last name, email and NPN
- You will receive an email to verify your email address
- After verification, you can log in to the site
- You will see the assigned training videos
- Watch each video in order and click the 'Next Video' button after each one has completed
- Acknowledge you have completed the videos and click the 'Submit' button

### Step 3

Create a PlanEnroll Realtime lead campaign in LeadCENTER. This will ensure you appear at the top of the results list on the Agent Map as a Preferred Network Agent.

- Log in to LeadCENTER and click "Realtime Campaigns." Next, select "New Campaign" in the upper right-hand corner. Name your campaign and select the campaign type — either calls or data leads.
- Next, select "Health" as the product type and choose "PlanEnroll Realtime Lead" as your lead type. Select the agent you'd like the leads or calls assigned to — this could be you or an agent in your hierarchy.
- Then, choose the campaign geography — the area in which you'd like to receive leads or calls. You can select either by state and county, or by ZIP code. Please note, the number of ZIP codes that can be included in each campaign is limited. To include more ZIP codes, you can create additional campaigns.
- Next, choose how many leads you want. This will determine the number of calls or leads you may receive per week and per day. Enter your desired volume and set a limit to the number of daily calls or leads by clicking "Enable Daily Cap."
- Finally, review the selections you've made and make sure they appear on the Campaign Summary page.
- When you are ready, click "Launch" and select the "I'm Available" button in the upper right-hand corner. That's it — you will now be included as a Preferred Network Agent on the PlanEnroll map!

**Don't miss your opportunity to become a PlanEnroll Network Agent!**



**PlanEnroll**