Get connected and stay synced with PlanEnroll!

Client Sync helps you save time!

Client Sync is the fastest way for consumers to set up their PlanEnroll Profile and connect with you. It will be available on every Personal Agent Website!

Client Sync

- Gather consumer information (personal information, health information, doctors, pharmacies, etc.)
- Obtain permission to contact
- Get a signed SOA
- Stay connected with your clients

See how PlanEnroll's Client Sync makes connecting with clients faster and easier than other technology:

Key Feature	Others	PlanEnroll
Client Shares Information with Agent — Personal, Health, Doctor, Pharmacy and Prescription	✔	✔
Client References Information — and Can Update as Needed		✔
Agent Updates Information Which is Then Shared Back with Client		✔
Automatically Creates Client Record In CRM		✔
Client Can Shop / Enroll On Their Own (Agent Gets Credit)		✔
Client Can View Plan They Enroll In		✔
Captures Permission to Contact (PTC)	✔	✔
Completes Scope of Appointment (SOA)	✔	✔
Scope of Appointment Tracking		✔
Pre-Approved and Compliant Marketing Material		✔

Collect the information you need, get permission to contact, initiate a signed SOA — all in a profile that is synced with you. Share your Personal Agent Website with your clients to get started!

PlanEnroll