



## PlanEnroll

PlanEnroll.com is Integrity’s nationally-marketed consumer-facing website, where consumers can find an agent, review helpful content about products, view a quote, and create an account to save their personal information. Consumers can also submit applications for Medicare products. Applications for Final Expense products aren’t available on PlanEnroll yet.

Each agent automatically gets their own Agent Website on PlanEnroll.com. The link to an agent’s website is on the agent’s Account screen in Integrity Clients. It can be used in marketing materials, including business cards, social media posts, email signatures, etc.

An agent’s website shows the agent’s name, NPN and Agent Phone Number. Consumers can call the Agent Phone number (the call will automatically be recorded) or fill out a form to request a callback from the agent. Requested callback leads are automatically sent to Integrity.

PlanEnroll quotes through an agent’s website only include carriers the agent is appointed to sell, and when a consumer applies for a Medicare plan on the agent’s website, the agent gets the commission.

## Consumer Profiles

Consumers can save and update their contact details and their provider(s), prescription(s), pharmacy, and health condition(s) on PlanEnroll by creating a profile. This will create a new Contact or update an existing Contact in Integrity Clients. Contacts are synced to consumer profiles, so changes made by the agent will update the consumer’s profile, and changes made by the consumer will update the agent’s Contact record.

The screenshot shows the 'Account Settings' page in the Integrity system. At the top, there is a toggle for 'I'm Available:' which is currently turned off. Below this is the Integrity logo and a hamburger menu icon. The main heading is 'Account Settings'. Underneath, there is a section for 'Personal Information' with several input fields: 'First Name' (containing 'Rachel'), 'Last Name' (containing 'Smith'), 'National Producer Number (NPN)' (containing '1909744'), 'California License Number (CLN)' (containing '1873647'), and 'Phone Number' (containing '801-555-6739'). A 'Save' button with the Integrity logo is located at the bottom right of the form.

## Agent Website

Send your personalized link to the client to get them started with shopping for plans. Don't worry, you will get credit if the consumer enrolls in any of these plans.

[Copy Link](#)