INTEGRITY®

GETTING STARTED GUIDE

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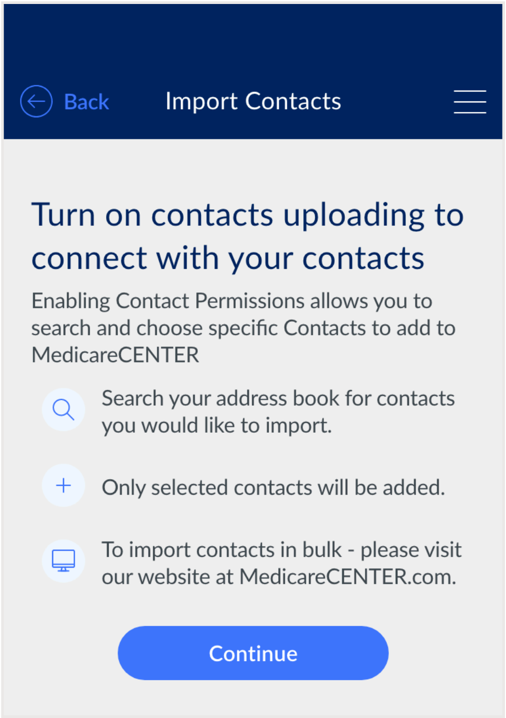
Creating Contacts

Integrity delivers a powerful, streamlined solution for managing the most important part of an agent's business: their Contacts. Agents can create and maintain client relationships from leads through sales, including renewals and cross-sell opportunities.



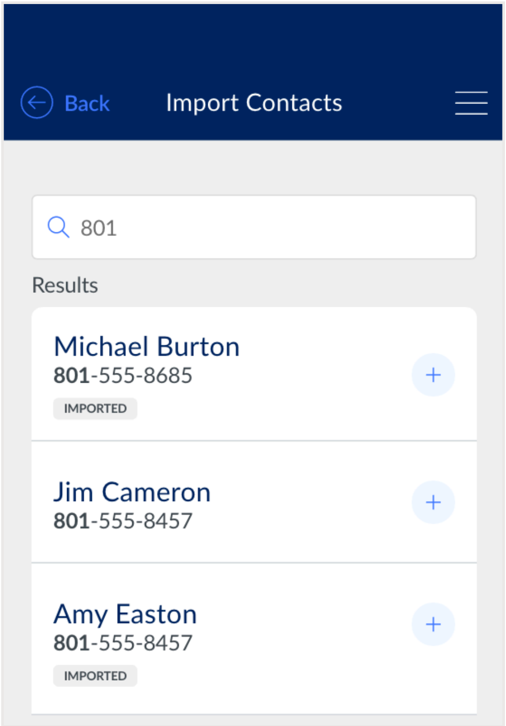
Importing and Creating Contacts

Contacts can be imported or added manually. Contacts can be added in four main ways:

- Bulk Import
- One Contact at a Time
- LeadCENTER Campaigns
- Mobile Device Import

Bulk Contact Import

To import a list of Contacts, click Contacts, then click the Import button. The Contact Import screen shows the list of fields available for import and provides a Comma Separated Values (.csv) template if needed. It also shows instructions for saving a .csv and uploading it.



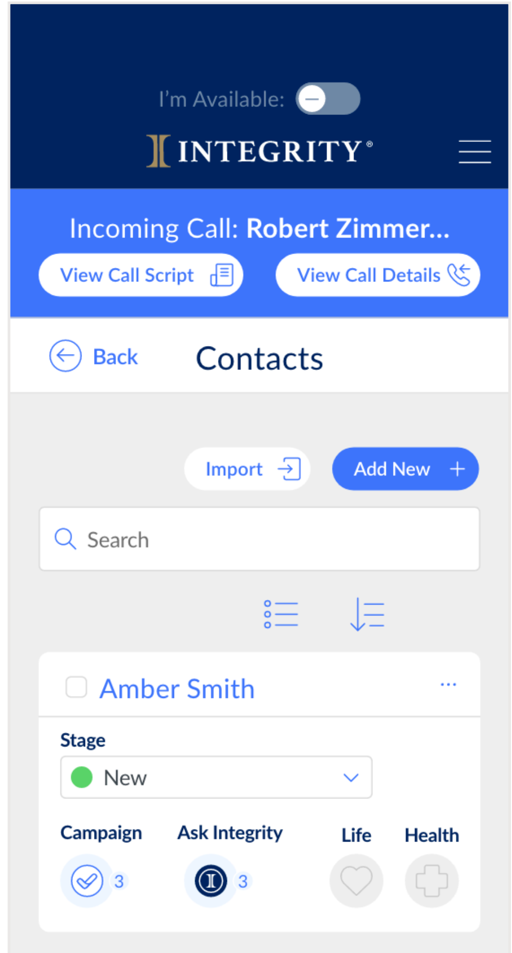
Once the .csv file has been added through file browser or drag-and-drop, the columns in the .csv file need to be dragged and dropped to match the fields below. For example, if a column in the .csv has the clients' first names it would need to be dragged to the First Name field.

When the import is complete, the Contact Import screen will show the number of records that were added successfully, as well as any that weren't added because of errors like duplicates. To complete the import process and go back to the Contacts screen, click Finish. There is no limit to the number of files that can be imported.

Creating Contacts

One Contact at a Time

To add a single Contact without importing, click the Add Contact button on the Contacts screen. The Contact Details screen will be shown next and lists the fields that can be filled out. The only fields that are required to create a Contact are first name, last name, and either phone number or email address. More than one Contact can share the same phone or email if they have different first names or last names. For example, husband and wife John Smith and Jane Smith will each have their own Contact record and can share a phone number or email address.



LeadCENTER Campaigns

Leads that are purchased in LeadCENTER are delivered directly to Integrity as Contacts, including all contact information available from the leads.

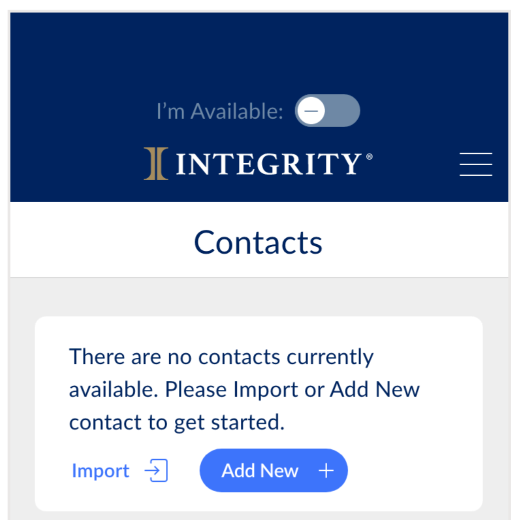
Lead campaign management is still done in LeadCENTER.

Mobile Device Contact Import

Agents who download the Integrity mobile app can import Contacts directly from their iOS or Android device. The mobile app is available from the App Store and Play Store.

Tap to the Contacts screen and then tap the Import button. The agent will only need to accept Contact-sharing permissions the first time they import a Contact, and they can update the permission anytime in their device Settings.

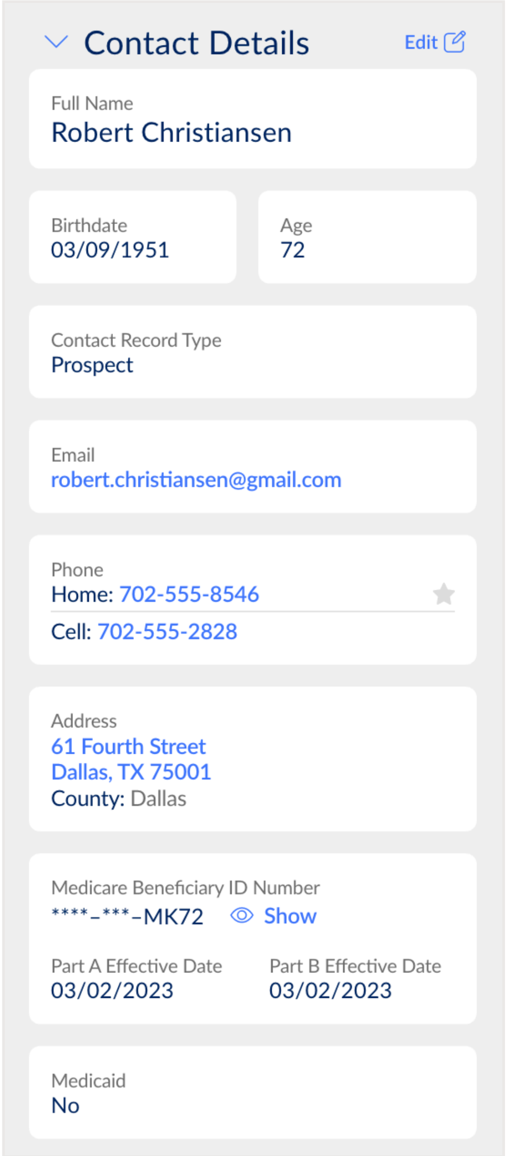
Contacts imported from the Integrity Mobile App are added on a one-time, one-contact basis – and only the specific Contacts that an agent selects will be added to their Integrity Contacts.



Creating Contacts

Contacts are synced between the web and mobile apps, so if an agent creates or updates a Contact on the mobile app, the update is also made on the web – and vice versa.

If the agent updates the Contact on their mobile device, though, the Contact information won't be updated in Integrity, and vice versa. The agent will need to make the update in their phone's Contact and in Integrity.



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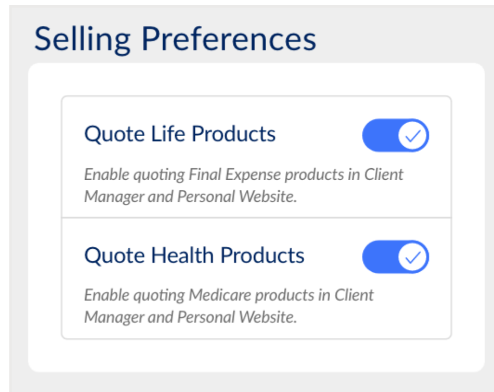
Selling Preferences and Active Selling Permissions

After registration and login, go to the Account screen by clicking the agent's name in the upper right corner, then clicking Account. Agents can check and update their contact information, selling preferences, and active selling permissions with carriers.

Selling Preferences

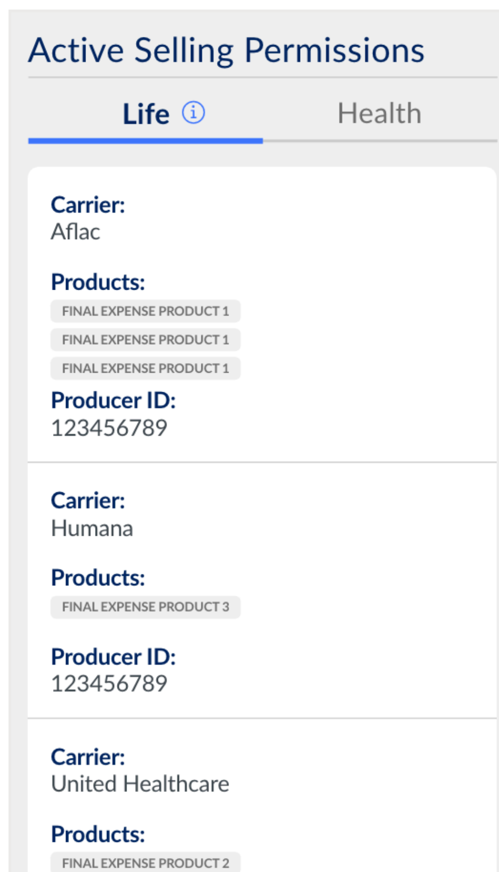
Go to the Selling Preferences section and choose the product(s) to quote – Life, Health, or both. This will make the quote / application process quicker and easier. It can be changed at any time.



Active Selling Permissions

Agents will only be able to apply for a plan if they have Active Selling Permissions for it, so it's important to review the Active Selling Permissions section of the Account page before starting a Quote.

Missing permissions can be added in the Self-Attested Permissions section. Click on either Life or Health, then click Add New.

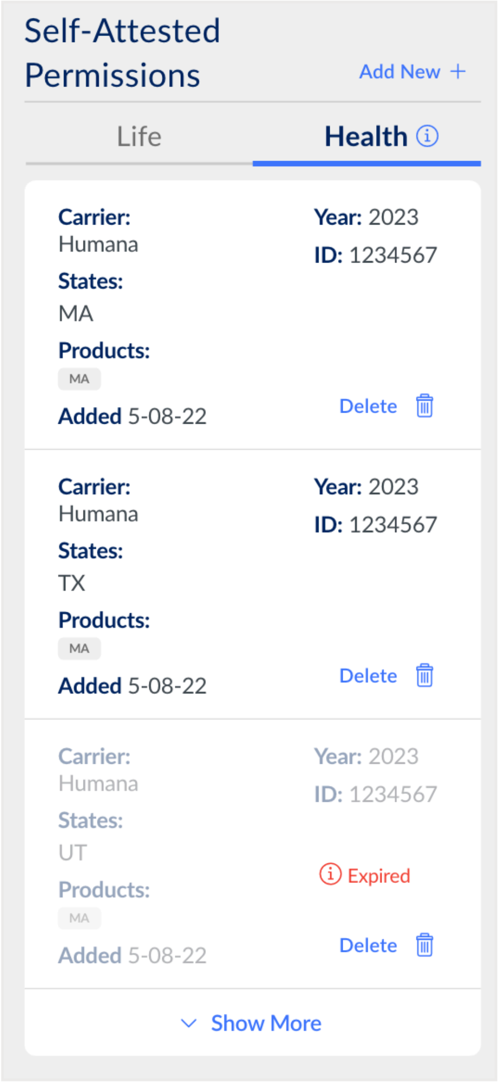


Life Active Selling Permissions

- Life Selling Permissions are for Final Expense Plans
- Agents can attest to Selling Permissions for all supported Final Expense carriers
- Adding Life Selling Permissions also allows agents to get Single Sign On access to available carrier websites for eApplication. Those applications will be pre-filled with the information from the Contact record, and the policy information will be available in Integrity once it's approved.

Health Active Selling Permissions

- Health Selling Permissions include Medicare Advantage and Prescription Drug Plans
- Agents can attest to selling permissions for additional states and products for their existing carriers
- Attested Permission(s) will be checked against the carriers' records. If the Self-Attested Permission hasn't been verified by the carrier after five days, the Self-Attested Permission will be removed.



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Quotes and Applications

Integrity gives agents the ability to run Health and Life quotes across a wide range of national and regional carriers, and to apply for policies where available (depending on product and carrier).

Agents can start a quote for a client once the Contact record has been added to Integrity.

From the Contact List screen, click the three dots at the end of the Contact's row, then select Start a Quote and choose the policy type (Life or Health).

From the Contact Details screen, click the Start a Quote button under the Contact's name, then choose the policy type to quote (Life or Health).

Life Quotes

Integrity provides Life agents with quotes for Final Expense policies and links to carrier sites for eApplications where available.

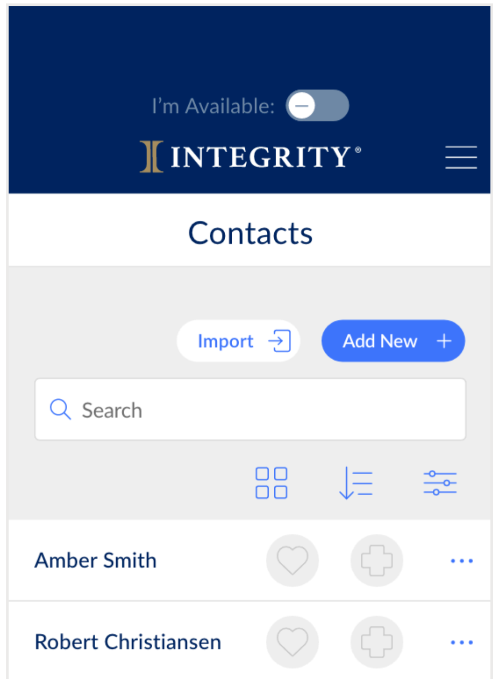
After starting the quote, the agent can personalize the quote results by completing a Health Intake for the client, and by adding their client's health conditions (used for Final Expense policy underwriting) to the Contact Details.

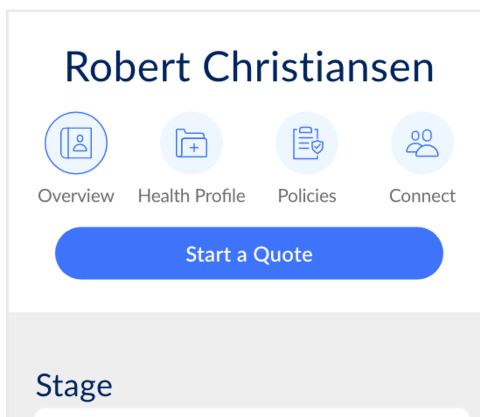
The quote results will be sorted by best available value.

If the Client might not be eligible for a product because of underwriting criteria, the product is not included in the quote results by default.

The products that a client might be eligible for are sorted by Level, Graded/Modified, and Guaranteed Issued products – from low to high premium within each category. Please note that the final underwriting decision is made by the carrier once the application has been submitted.

To see all products, click "Show Excluded Products" in the quote filter. Click on the "Prescreen Available" icon to see why the product was excluded.





Quotes and Applications

Adjust the coverage amount or monthly premium to help the client choose the best coverage per price point.

Life Policy eApplications

Integrity partners with select carriers to provide single sign-on (SSO) links the agent can use to submit applications directly on the carrier sites without having to log in separately. Those carrier links can be found in the menu under the agent's name. The information from the Contact record will be pre-filled in the application on the carrier's site.

Agents can only apply on a carrier's site if they're appointed to sell with that carrier. Agents can see and may be able to update their Active Selling Permissions on the Account page.

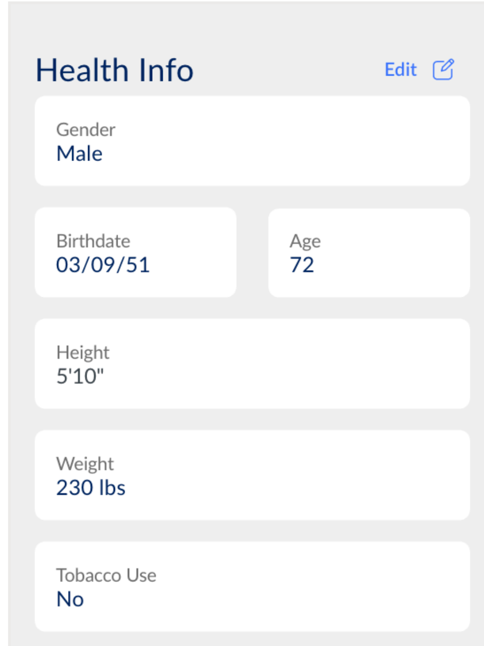
Health Quotes

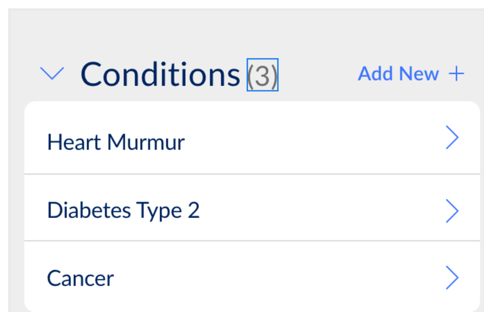
Integrity provides Health agents with quotes and eApplications for MAPD, MA, and PDP products.

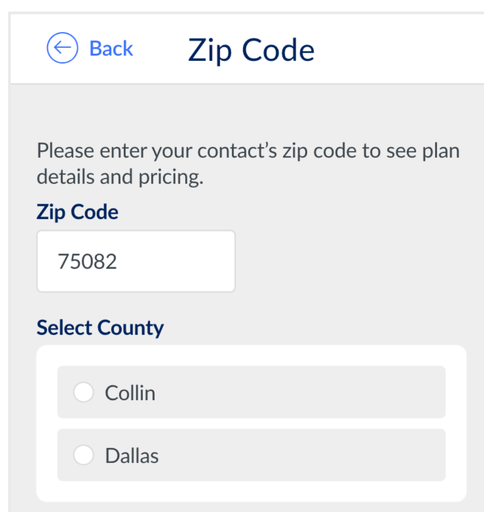
A Health Quote requires the Contact's zip code, so a screen will be displayed to enter the zip code if it's not already saved in the Contact Details.

By default, the Quote results will only show appointed carriers and products. Agents can view and may be able to update their Active Selling Permissions on the Account screen. To see all carriers and products available in the Contact's area, deselect "My Appointed Plans" on the left side of the screen.

Quote results can be sorted and filtered.







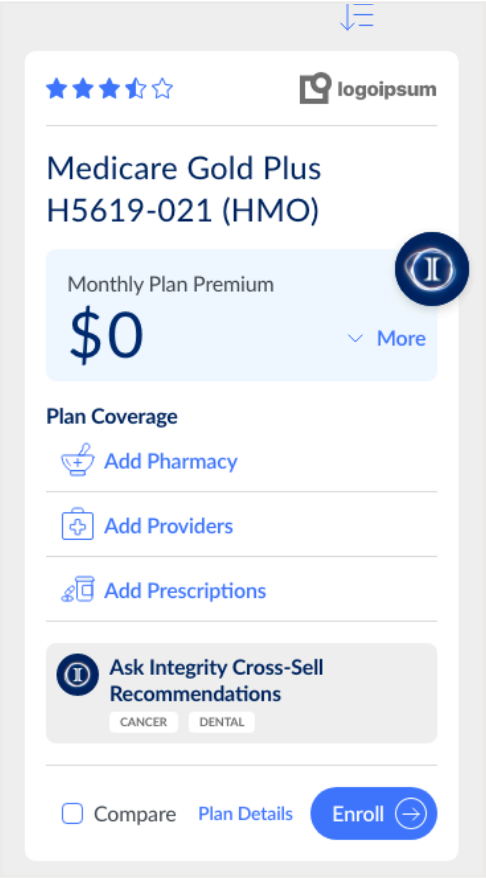
Getting Started Guide

Quotes and Applications

For the most accurate quotes, make sure to add the Contact's Providers, Prescriptions, and Pharmacy. This can be done on the Health Profile in the Contact's record, or beneath each plan in the Quote screen.

Up to three plans can be compared at once, and the comparison can be sent to a Contact through text message or email.

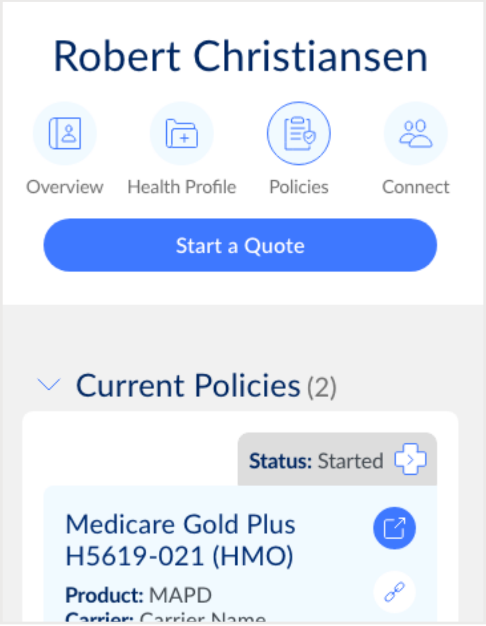
Click Plan Details at the bottom of each plan to see the cost breakdown and plan documents.



Health eApplications

Click Enroll to submit the application for the plan. The application form can be sent to the client to fill out, or the agent can fill it out.

If a Health Risk Assessment (HRA) is available for the carrier, the link will be on the last page of the application when the agent submits it. HRA availability and requirements vary.



Getting Started Guide

Contact List

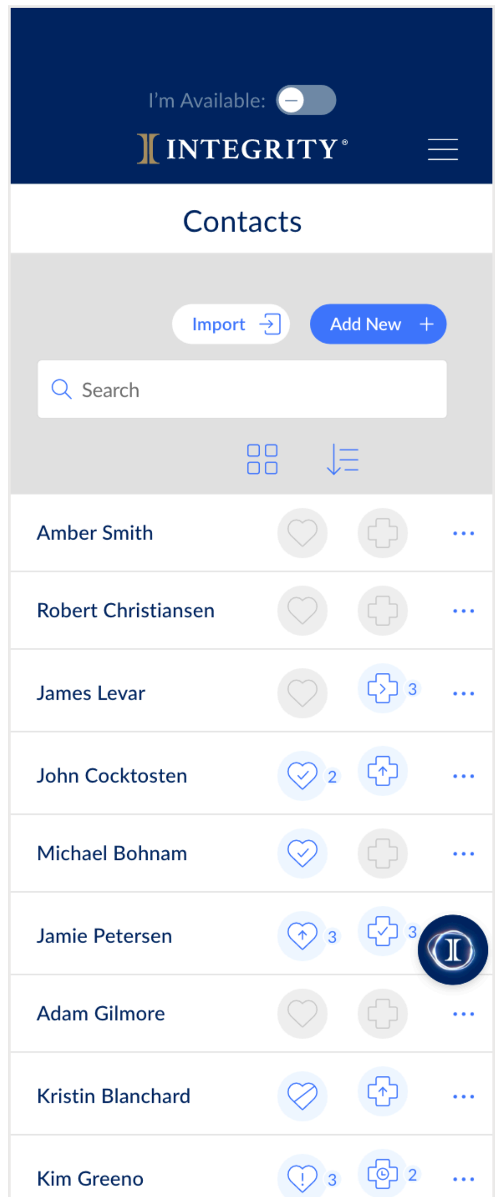
Agents can quickly and easily manage their relationships with their clients in Integrity from through the entire sales process from leads through sales, including annual renewal and cross-sell opportunities.

To see all Contacts the agent has added to Integrity or that have been created in Integrity from LeadCENTER, click Contacts in the top bar. In addition to bulk importing Contact records and creating Contacts one at a time, the Contact List lets agents search, sort, and filter their Contact records.

Contact List Information

Each Contact record on the Contact List screen shows the following information:

- Contact Name
- Stage
- Tags
- Life Policy(ies)
- Health Policy(ies)



Bulk Export and Bulk Delete

The first column on the Contact record has the "Select" checkbox to the left of the Contact's name. Clicking the box for one or more Contacts makes the Export and Delete options available.

Contact Name

All Contact records require a first and last name, which can be clicked to go to the Contact Details screen.

Stage

The Stage dropdown helps agents track where the Contact is in the sales cycle. Stages are either updated automatically by Integrity or manually updated by the agent. The choices, in chronological order based on sales cycle, are:

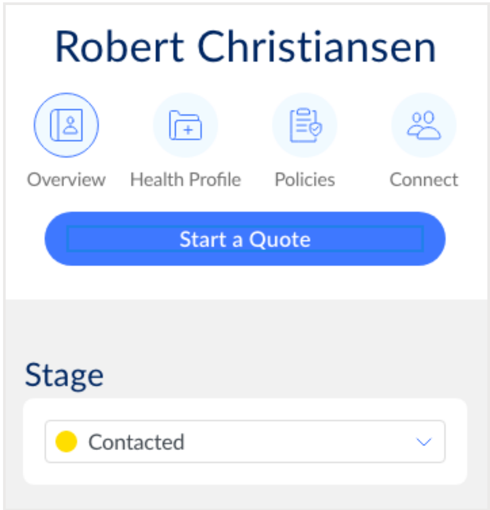
New: Default value for new Contacts added to Integrity. Helps agents find their leads quickly.
Contacted: Contacts the agent has reached out to through Integrity.
These Contacts have one or more call recordings linked to them (either incoming or outgoing), and / or the agent has sent them one or more Scopes of Appointment (Health Contacts only).
Engaged: A Contact with one of the following actions completed:

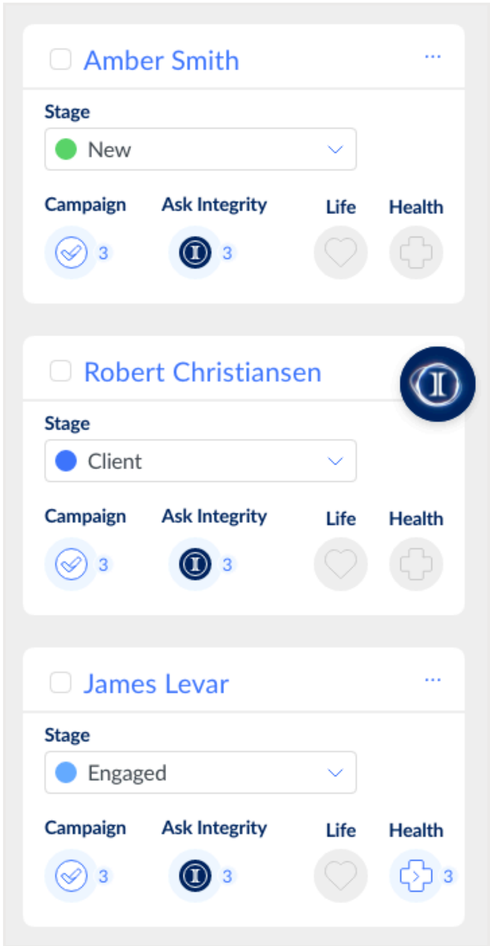
- Signed SOA (Health Contacts)
- Completed SOA (Health Contacts)
- Quote Shared (Health Contacts)
- Comparison Shared (Health Contacts)
- Health Intake completed (Life Contacts)

Client: The agent has sold one more policies to the Contact (Health and/or Life) and one or more policies is/are in effect or in progress.
Retained:

- Health Contacts: At least one annual renewal.
- Life Contacts: Two consecutive years of having a policy (based on effective dates)

Loyal: Three or more years of renewals / history plus at least one active or in progress plan (based on effective dates)
Lost: This stage can only be set by the agent. After setting the Contact's stage to Lost, the agent can choose from a list of reasons the Contact was lost.



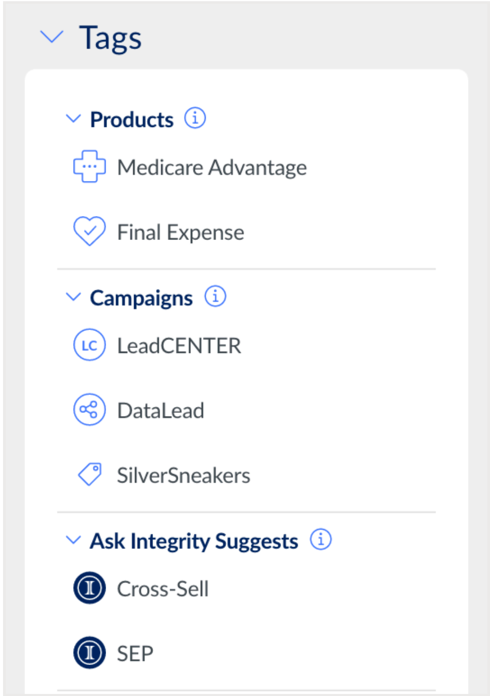


Getting Started Guide

Contact List

Tags

Tags help agents quickly identify and review additional information about the Contact, including the product type, lead campaign information from LeadCENTER, and more. They're used for several purposes, including filtering the Contact List. Any tags that on the Contact record are shown in Tags column on the Contact List screen.



Policies

The next two columns on the Contact List screen are for Life and Health policies.

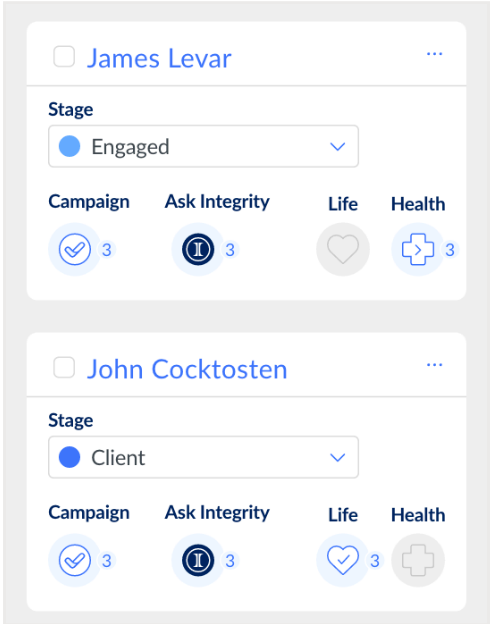
If the agent has sold one or more Final Expense policies to the Contact through an Integrity upline, the heart icon will be blue. If not, the heart icon will be gray.

If the agent has sold one or more Medicare policies to the Contact through an Integrity upline, the cross icon will be blue. If not, the heart icon will be gray.

Policies the agent has sold to the Contact through an Integrity upline are automatically connected to the Contact record by Integrity.

The final column in the Contact List helps agents take quick action on the Contact:

- View Contact – Jumps to the Contact Details screen
- Start Quote – Begins a Health or Life product quote
- Connect -
  - Call: Places a recorded outgoing phone call to the
  - Contact's phone number. The Contact record must include the Contact's phone number for this to work.
  - Email: Opens the agent's external email program (Outlook, Gmail, etc.) with the Contact's email pre-filled



Contact List

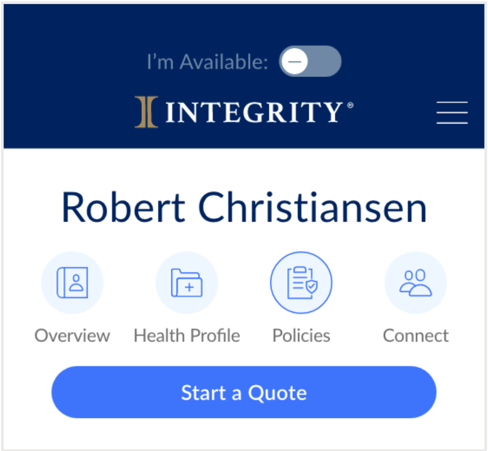
- Call Script: Opens a window with the Health and Life disclosures that the agent is required to read to the
- Contact for compliance
- SOA
- Add Reminder: Creates a reminder for the agent on the Contact record
- Scopes of Appointment (Health agents only): Jumps to
- the Scopes of Appointment screen

Contact Details

Top Bar

The bar at the top of the Contact Details screen shows the Contact's name and has links to different areas of the Contact record:

- Overview
- Health Profile
- Policies
- Connect
- Start Quote



Overview Tab

The Overview tab helps agents quickly review the Contact details, history and to-do list.

Stage

The Stage dropdown helps agents track where the Contact is in the sales cycle. Stages are either updated automatically by Integrity or manually updated by the agent. The choices, in chronological order based on sales cycle, are:

<ins>New:</ins> Default value for new Contacts added to Integrity. Helps agents find their leads quickly.
<ins>Contacted:</ins> Contacts the agent has reached out to through Integrity.

- These Contacts have one or more call recordings

linked to them (either incoming or outgoing), and/or the agent has sent them one or more Scopes of Appointment (Health Contacts only).
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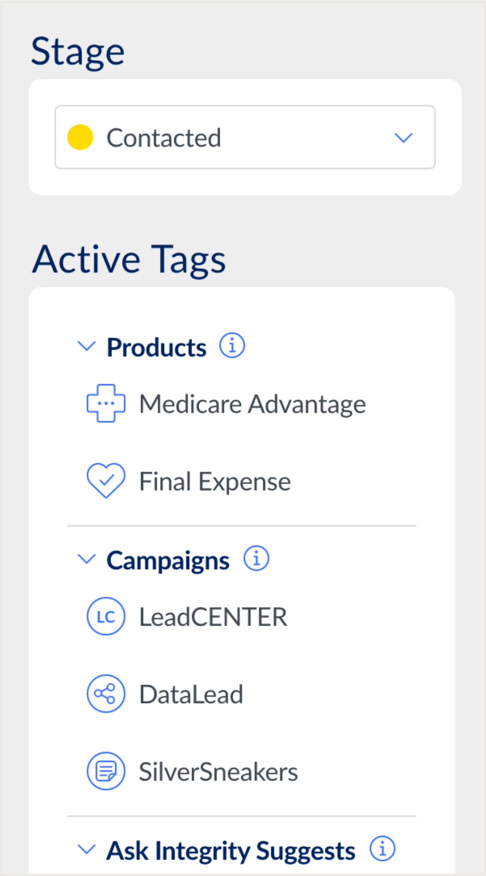

Contact Details

- Health Intake completed (Life Contacts)

Client: The agent has sold one more policies to the Contact (Health and/or Life) and one or more policies is/are in effect or in progress.

Retained:

- Health Contacts: At least one annual renewal
- Life Contacts: Two consecutive years of having a policy

Loyal: Three or more years of renewals/history, plus at least one active or in-progress policy (based on effective dates)

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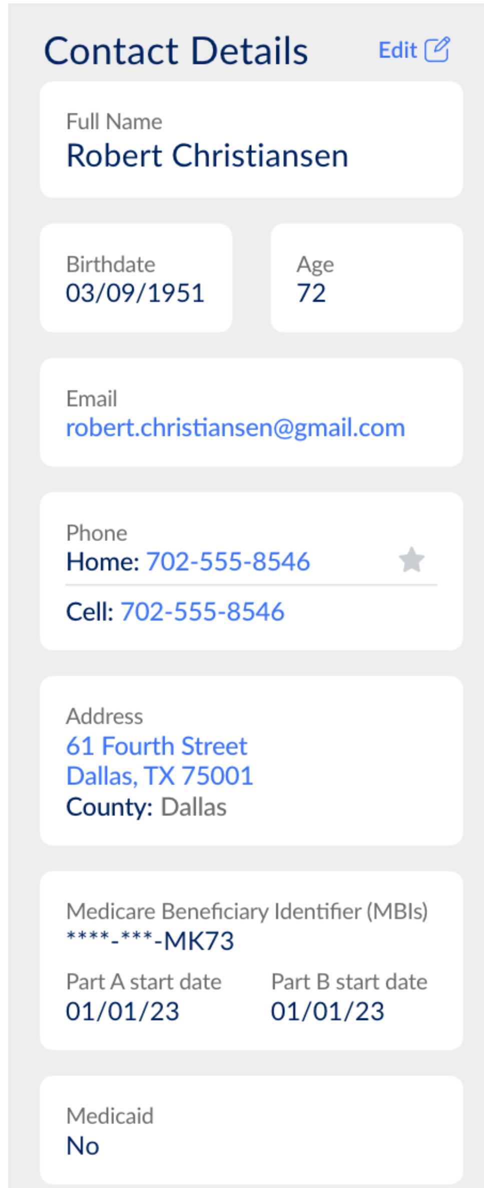


Tags

Contact Tags help agents quickly identify and review additional information about the Contact. Most tags are applied on the Contact record automatically by the platform, but agents can also create their own custom tags and apply them to their Contacts.

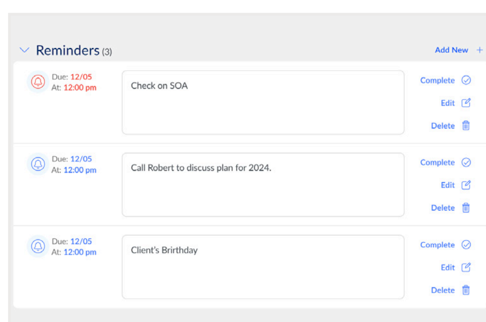
Tag categories:

- Product Type
- Lead Campaign information from LeadCENTER
- Ask Integrity Suggests
- Custom

Tags are listed under the Stage dropdown. Additional tag functionality is coming soon.

Contact Details

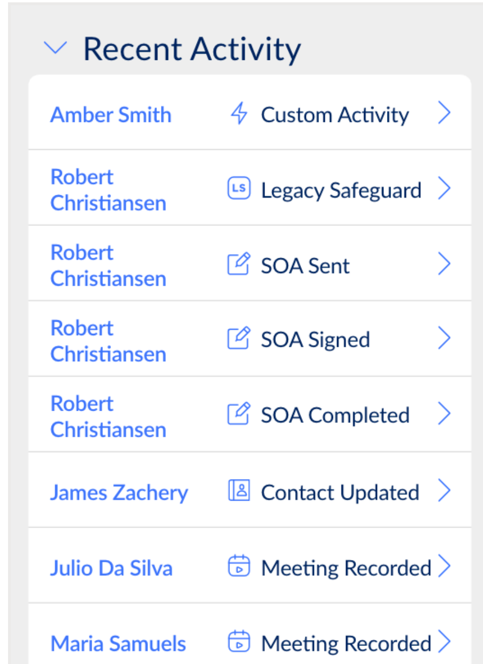
First name, last name and either phone or email are the only contact details required to save a Contact record, but additional information can be added if it's available. Click or tap Edit to make updates, then click Save.

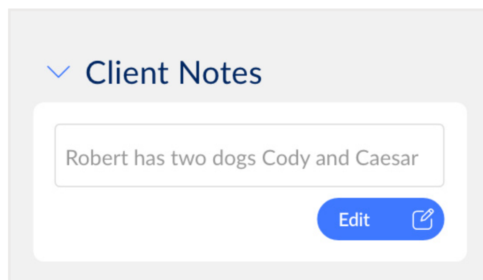


Contact Details

Contact Details include:

- First name
- Last name
- Birth date
- Age
- Phone number
- Email address
- Street address
- City
- State
- ZIP
- County (if applicable)
- Medicare Beneficiary ID (Health Contacts)
- Part A start date (Health Contacts)
- Medicaid participation (Health Contacts)





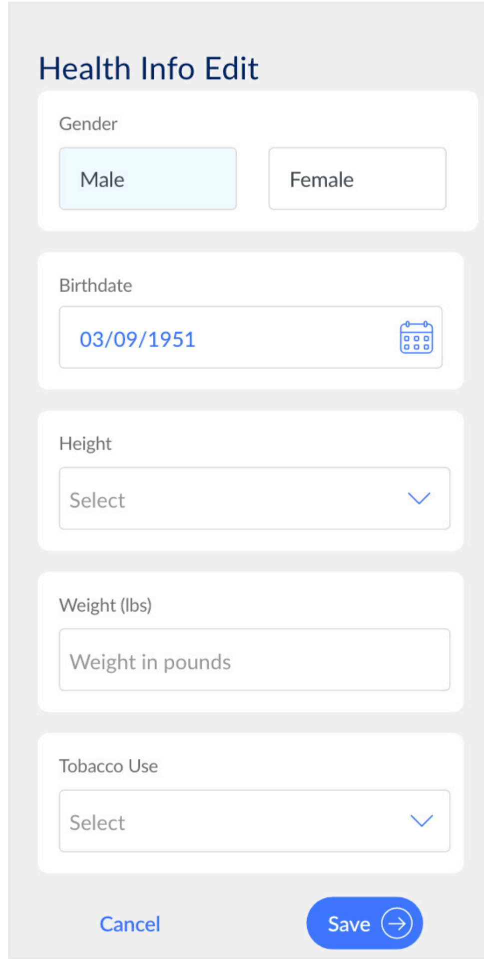
Reminders

Agents can set one or more reminder(s) for each Contact. All Reminders are shown in the Reminders list. Past-due Reminders are listed first, then upcoming Reminders are listed in chronological order by due date.

To add a Reminder, click or tap Add New. Agents can choose a due date and time for the Reminder and add Reminder details. A Reminder can be completed, edited or deleted.

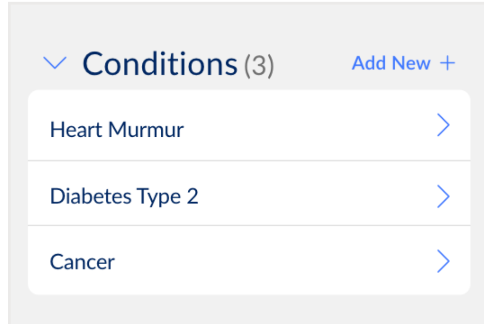
Activities

Each Contact record has an Activity stream that shows an at-a-glance history of actions that have happened with the Contact record. Some Activities are created automatically by the platform, like the date the record was created, when contact info is updated, when the Stage is changed, when a call is recorded, etc. Agents can also create their own custom activities to save details about actions that happen outside the platform — for instance, if they sent a birthday card or referral email to the Contact, or met them in person — by clicking or tapping Add New. Activities can be edited, and the list can be sorted by Activity date or Activity type and/or filtered by Activity type.



Client Notes

The Client Notes field is for high-level notes about the Contact that the agent would like to check quickly — for instance, the names of the Contact's family members or other details the agent would like to remember with just a quick glance. Please note: This field is not intended for Personal Health Information (PHI). The Contact's providers, prescriptions, pharmacies and health conditions are stored on the Health Profile tab in the top bar.



Health Profile Tab

The Health Profile tab stores health-related information that can be used to customize quotes to find the best fit for the Client. It includes:

Health Info
Add and edit:

- Gender
- Height
- Weight
- Tobacco use

Providers

Search for and store the Client's doctors and other health care providers, including provider locations. Click or tap Add New to find the Client's provider and add it to their Health Profile.

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Contact Details

Prescriptions

Search for and store the Client's prescription drugs, including suggestions for generic alternatives. Click or tap Add New to find the Client's prescription drug and add it to their Health Profile. Click or tap Edit to update the prescription dose or quantity, or to remove the provider from the Client's Health Profile.

Pharmacy

Search for and store the Client's preferred pharmacy. Click or tap Add New to find the Client's pharmacy and add it to their Health Profile. Click or tap Edit to remove the pharmacy from the Client's Health Profile.

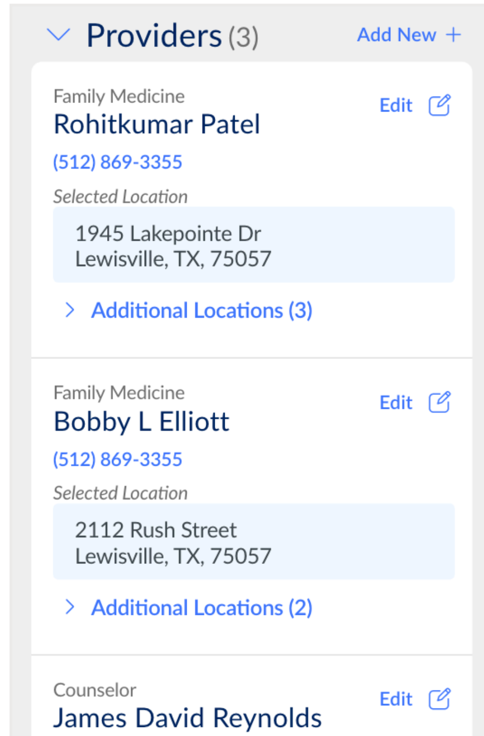
Health Conditions

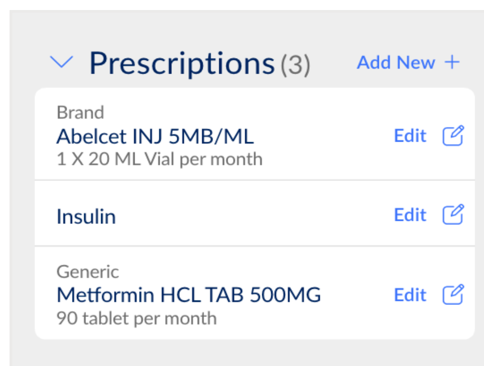
Search for and store the Client's health conditions (not all conditions are available). Click or tap Add New to find the Client's condition and add it to their Health Profile. Click or tap Edit to remove the condition from the Client's Health Profile.

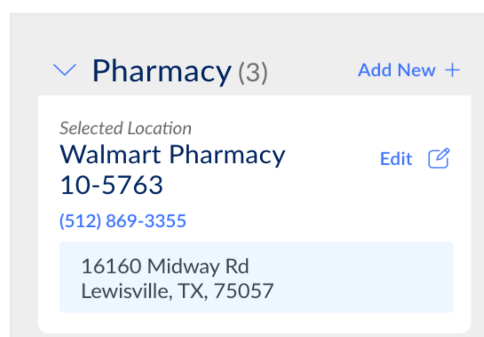
Policies Tab

Current and past Policies are available on this tab if the carrier provides the Policy information to Integrity, and if the Policies have been linked to the Contact either automatically by Integrity or manually by the agent.

Client policy status is updated as the policy is processed (if the carrier provides status updates).



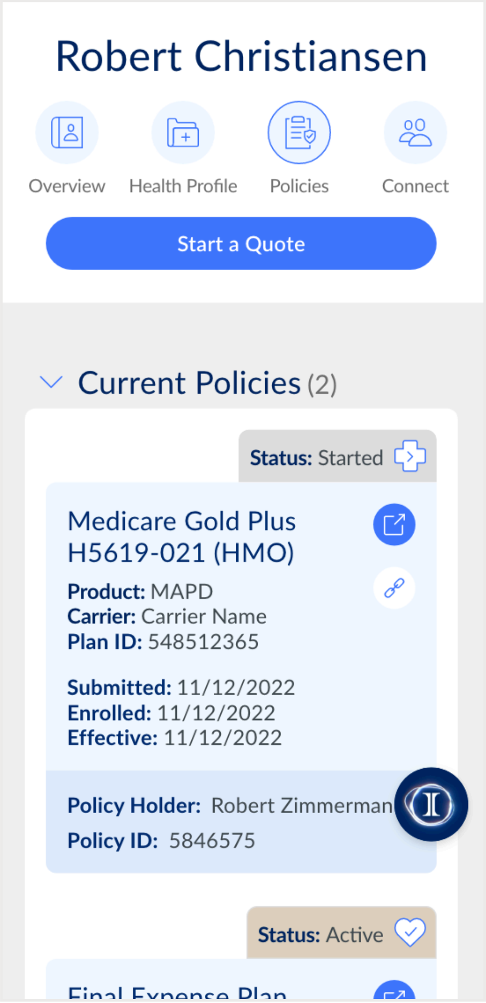




Contact Details

Agents will only see policies they have sold to their Clients through their Integrity upline. They will not see any policies purchased by their Clients through other agents, or through contracts outside of Integrity.

Again, please be aware that policy data availability varies by carrier group and within carrier groups.



Connect Tab

The Connect tab in the top bar helps agents take quick action to connect to the Contact:

- Call: Places a recorded outgoing phone call. The Contact record has to include the Contact's phone number for this to work.
- Email: Opens the agent's external email program (Outlook, Gmail, etc.) with the Contact's email pre-filled.
- Call Script: Opens a window with the Health and Life disclosures that the agent is required to read to the Contact for compliance.
- Scopes of Appointment (Health agents only): Jumps to the Scopes of Appointment screen.

Start a Quote Button

The Start a Quote button at the bottom of the top bar allows agents to jump straight to a Quote for the Client.

- If the agent hasn't selected which product(s) they sell on the Account page, the Start a Quote option will prompt to choose whether to start a Health quote (Medicare) or a Life quote (Final Expense).
  - When the agent chooses a product to quote, they can also choose "Don't show this message again" and they won't see the product type prompt in future. If they want to see the prompt again, they can update the products they sell on the Account page.

Agent Phone Number and Call Recording

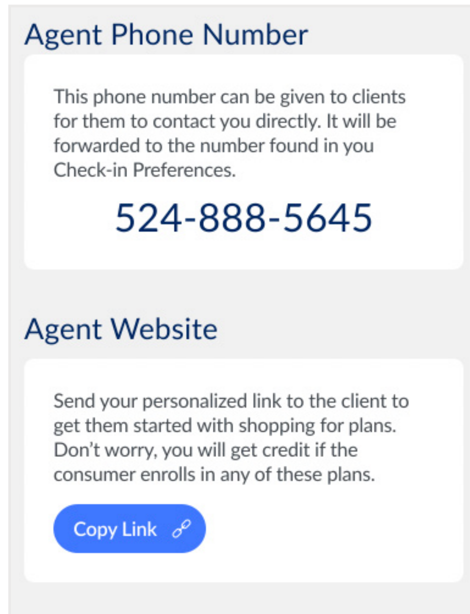
Integrity provides a unique Agent Phone Number to each agent. Any incoming calls to the Agent Phone Number will automatically be recorded. Outbound calls made through the Contact record will also be recorded. Recorded calls are useful for compliance, reviewing important information from the call, sales training, and creating call summaries and transcripts.

Agent Phone Number

Go to the Account page (under the agent's name in the top right) and find the Agent Phone Number section. It will show the agent's Agent Phone Number.

The Agent Phone Number is created when the agent logs in to Integrity for the first time. It's created based on the phone number the agent entered at registration. Integrity tries to create a number in the same area code. If no phone number is available at the time for the area code, a nearby area code will be used.

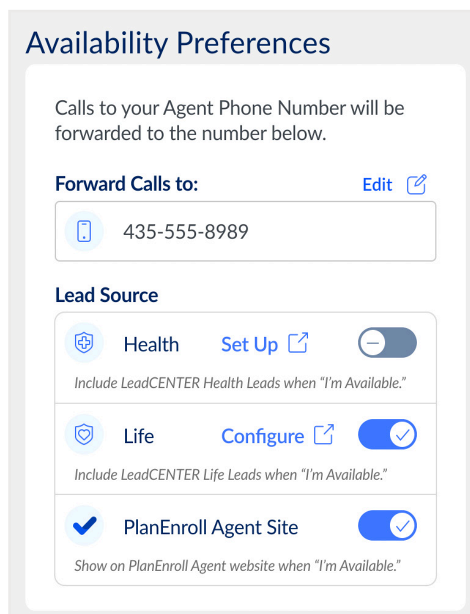
If the agent registered with a toll-free number, an Agent Phone Number will not be created and the agent will need to contact support.



Recording Incoming Calls

The caller will hear a pre-recorded message letting them know they will be connected to the agent and that the call is being recorded for quality and training purposes.

The agent can choose any phone number to forward the call to and can change that phone number at any time on the Account page, in the Availability Preferences section. The device for that phone number will ring when there's an incoming call. The agent will answer the call to be connected to the caller.

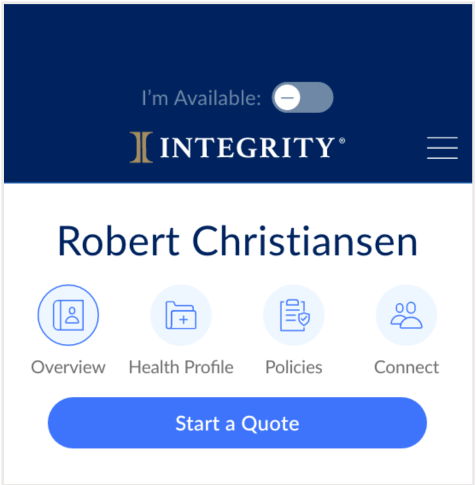


Training User Guide

Agent Phone Number and Call Recording

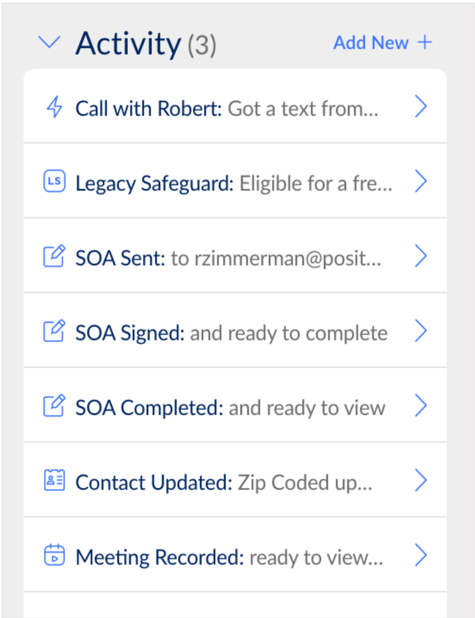
Recording Outgoing Calls

To place a recorded call to a Contact, go to the Contact Details page for that Contact and click Connect, then click Call. The device selected for call forwarding will ring. Answer the call, then wait for the Contact to answer their phone. The Contact will see the agent's name on Caller ID, and when they answer they'll hear a pre-recorded message letting them know they will be connected to the agent and that the call is being recorded for quality and training purposes



Finding Call Recordings

Once a call ends, the call recording can be found in the Contact Details, in the Overview screen. Scroll down to the Activity section to find the call. The recording can be downloaded for review, but it's important to protect any Personal Health Information (PHI) in the recording, so it's recommended to delete the recording after reviewing it. There's no limit to the number of times a recording can be downloaded.



Getting Started Guide

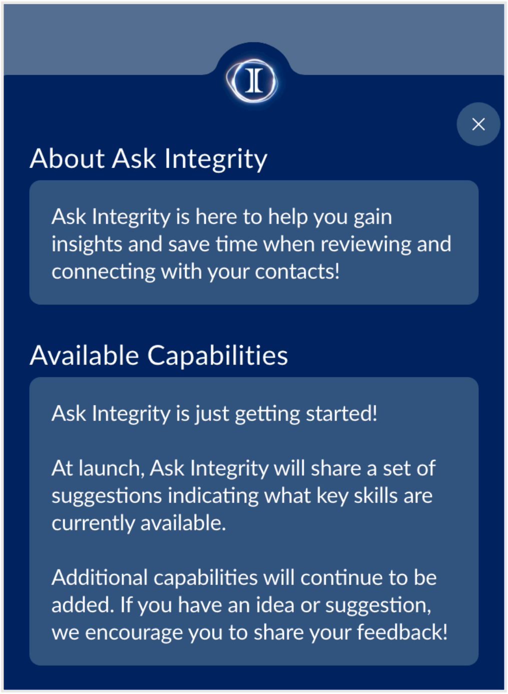
Ask Integrity

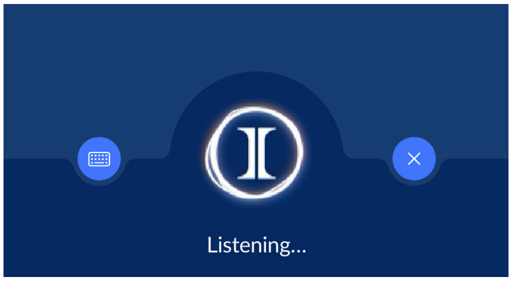
Ask Integrity is the first-in-the-industry, AI-powered digital assistant for agents. It combines data analysis with powerful intelligence and delivers it on-demand through Integrity.

Ask Integrity Offers:

- Client Information Summaries to help you know every client better, no matter how long you've work together.
- Call Summaries so you can easily review previous meetings and help you prepare for your next interaction.
- In-the-moment AI Prompts like Specialist Recommendations personalized to client history and preferences, so you can find the right plan for each situation.
- Secure Client Data Storage that gives you and your clients peace of mind

To use Ask Integrity, click the blue circle with the Integrity logo at the bottom right of the screen. Text prompts are available on the web, and voice prompts are available on the mobile app.





Ask Integrity™

Getting Started Guide

Agent Website

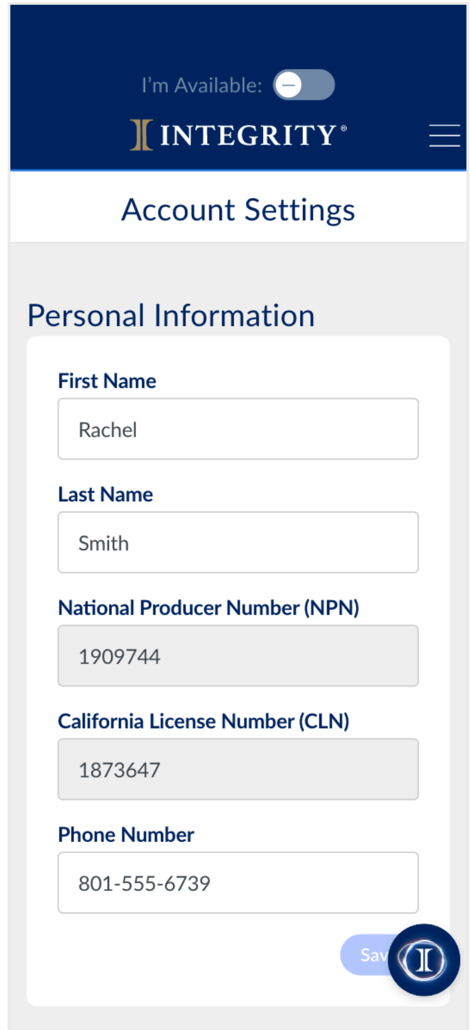
PlanEnroll

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 Expsense 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.

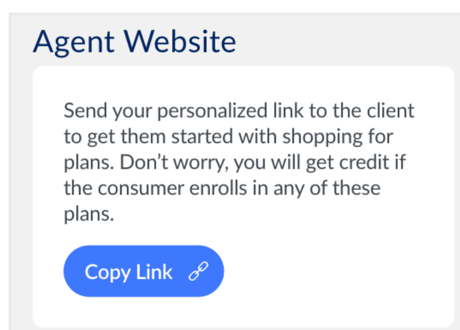
An agent's website shows the agent's name, NPN and Agent Phone Number. Consumers can call the Agent Phone number (the call will automatically be recorded) or fill out a form to request a callback from the agent. Requested callback leads are automatically sent to Integrity.

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

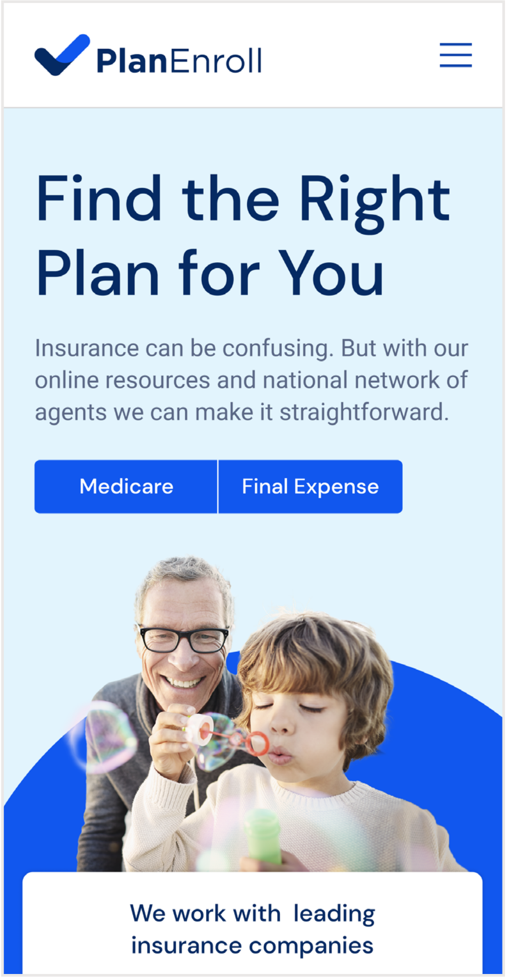
Consumers can save and update their contact details and their provider(s), prescription(s), pharmacy, and health condition(s) on PlanEnroll by creating a profile. This will create a new Contact or update an existing Contact in Integrity Clients. Contacts are synced to consumer profiles, so changes made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



About PlanEnroll

About PlanEnroll

PlanEnroll.com is Integrity's Consumer-facing platform. It gives Consumers a straightforward experience for finding Medicare and Final Expense coverage that fits their needs. PlanEnroll connects Consumers with helpful agents when and how they want – online, over the phone, or in person.



National and local marketing campaigns, along with lifecycle nurture marketing, drive demand and generate proprietary leads. Participating agents have access to these leads as PlanEnroll Network Agents. The PlanEnroll Network Agent program allows agents to benefit from these highly qualified and compliant leads, creating opportunities for lasting relationships.

In addition to the opportunity to participate as a PlanEnroll Network Agent, each Integrity agent is given their own Personal Agent Website on PlanEnroll.com through Integrity. It's customized with their contact information, including their Integrity Agent Phone Number. When Consumers use an agent's Personal Agent Website they can create a Profile that's linked the Contact record for the agent in Integrity. Consumers can also enroll in Medicare policies directly online and the agent will get the commission.

Calls to the Agent Phone Number are automatically recorded and available in Integrity. There's also a form for the Consumer to request a call from the agent. This creates a Contact record in Integrity, and the agent can see it on the PlanEnroll Leads tab of the Task List on the Dashboard screen.

Getting Started Guide

Lead Preferences

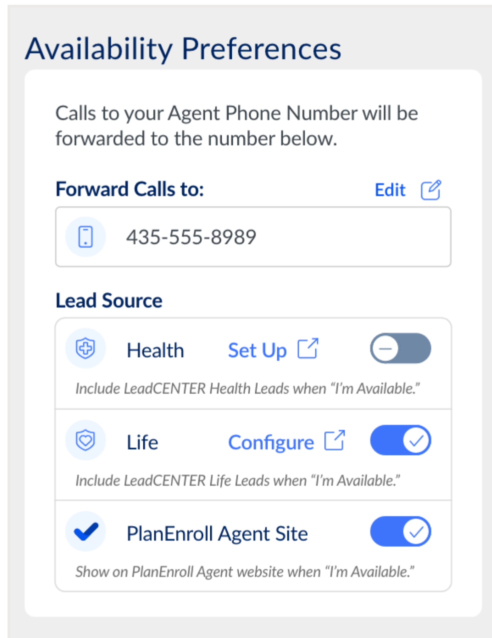
Integrity, LeadCENTER, and PlanEnroll.com work together to deliver high-quality leads to agents. Leads can be purchased in LeadCENTER including exclusive PlanEnroll leads. The leads are delivered to Integrity for contact lifecycle management, but lead campaigns are managed in LeadCENTER.

Lead Sources

To set up or edit lead delivery in Integrity, click the agent's name, then click Account. Find the Availability Preferences section, where the agent can update call forwarding for their Agent Phone Number and set up Lead Sources.

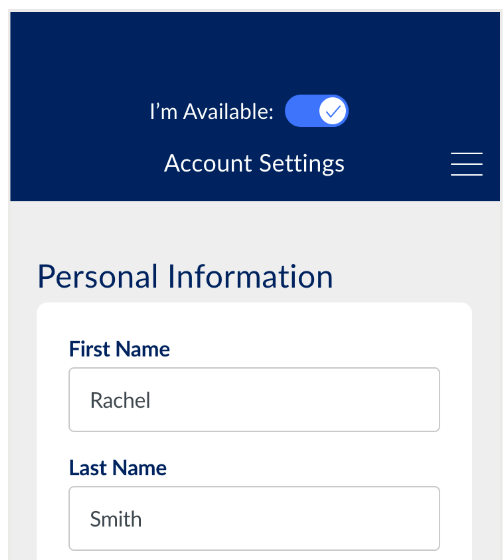
Agents can create lead campaigns (lead orders) in LeadCENTER for Health products, Life products, or both. If an agent doesn't have any active lead campaigns in LeadCENTER, they'll need to click Setup to go to LeadCENTER and create campaigns before they can turn on the lead source in Integrity. If the agent has one or more active campaigns across products in LeadCENTER, they can click Configure in Integrity to go to LeadCENTER and make any updates or create new campaigns.

The PlanEnroll lead source is turned on by default but can be turned off.



Availability Switch

Every screen in Integrity shows a switch at the upper right that says "I'm Available." Agents can switch their availability on or off whenever they choose. The Availability Switch controls warm transfer call lead delivery from LeadCENTER campaigns. When it's switched on, the PlanEnroll Agent Website shows "Available" next to the agent's name to encourage consumers to call the agent right then.



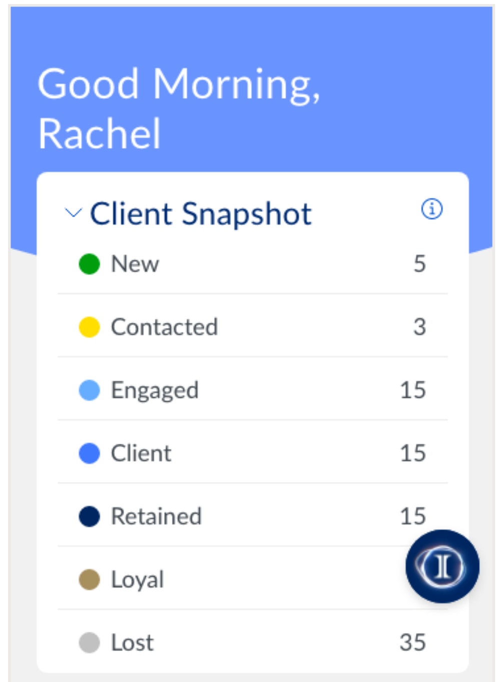
Getting Started Guide

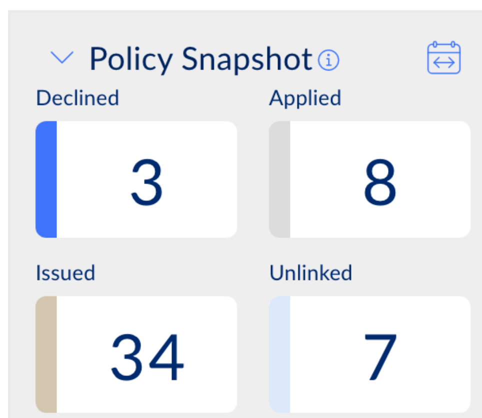
Dashboard

The Dashboard screen in Integrity is designed to give agents an up-to-date overview of their book of business. It includes the Client Snapshot, Policy Snapshot, Task List, and Activity Stream.

Client Snapshot

Each Contact record in Integrity has a value assigned in the Stage dropdown. The Stage value is updated either automatically by Integrity or manually by the agent, to help the agent track the Contact's progress through the sales cycle. On the left side of the Dashboard screen, the Client Snapshot quickly takes agents to a filtered list of all Contacts in a certain stage - like New or Contacted - so it's easier for the agent to find and follow up with their Contacts.





New: Default value for new Contacts added to Integrity. Usually used for new leads.

Contacted: Contacts the agent has reached out to are automatically updated to this stage if:

- There are one or more call recordings linked to the Contact record (either incoming or outgoing)
- And / or the agent has sent them one or more Scopes of Appointment (Health Contacts only).

Agents can set update Contacts to this Stage manually if it's not done automatically.

Engaged: A Contact with one of the following actions completed:

- Signed SOA (Health Contacts)
- Completed SOA (Health Contacts)
- Quote Shared (Health Contacts)
- Comparison Shared (Health Contacts)
- Health Intake completed (Life Contacts)

Client: The agent has sold one more policies to the Contact (Health and/or Life) and one or more policies is/are in effect or in progress.

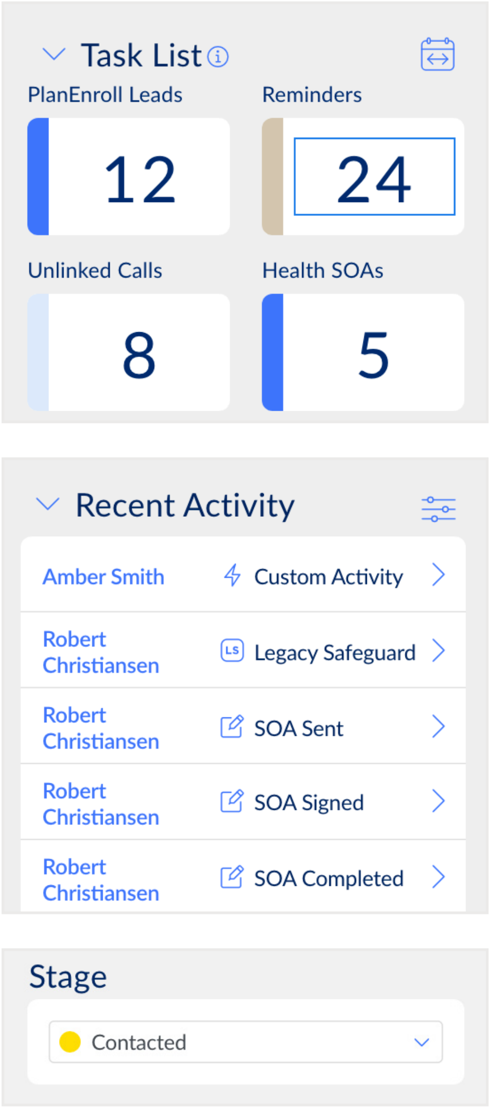
Retained:

- Health Contacts: At least one annual renewal
- Life Contacts: Two consecutive years of having a policy (based on effective dates)

Getting Started Guide

Dashboard

Loyal: Three or more years of renewals / history plus at least one active or in progress plan (based on effective dates)
Lost = This stage can only be set by the agent. After setting the Contact's stage to Lost, the agent can choose from a list of reasons the Contact was lost.



Policy Snapshot

At the top of the main section of the Dashboard screen, Policy Snapshot gives agents an at-a-glance status view of their applications and enrollments.

It has three clickable tabs: Declined, Applied and Issued.

- Choose the date range
- Click each tab to see a list of policies in that status
- To view more details about a policy, click "View Contact"

Client policy status is updated as the policy is processed.

Declined shows both Declined and Terminated policies. Integrity does not receive details from carriers about Declined or Terminated policies.

Applied shows policies in Started (Quote & eApp only), Submitted, Pending, or Applied status.

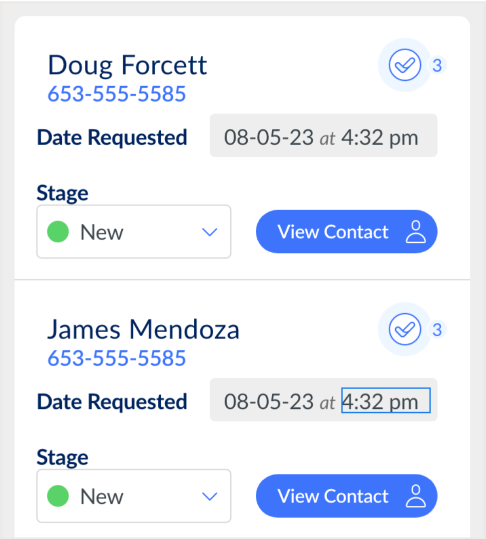
Issued shows Upcoming or Active policies.

Each policy moves through one status at a time. If no policies are available, try expanding the date range, or check for Unlinked Policies in the Task List. Please be aware that policy data availability varies by carrier group and within carrier groups.

Agents will only see policies they have sold to their Clients through their Integrity upline. They will not see any policies purchased by their Clients through other agents, or through contracts outside of Integrity.

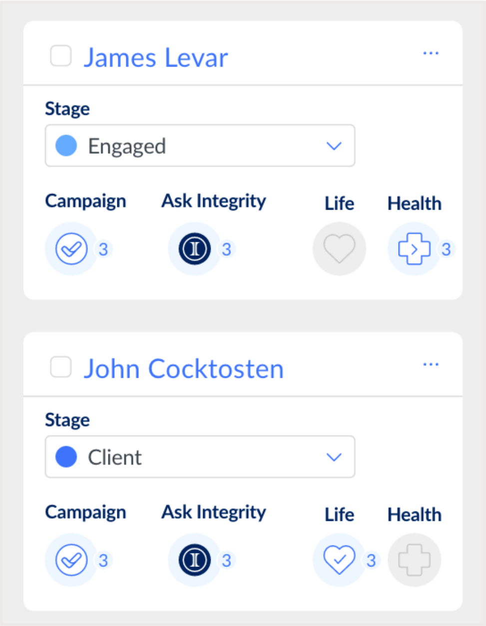
Task List

Scroll below the Policy Snapshot on the Dashboard to see the Task List. It's a time-saving place to help agents follow up with Contacts and administrative tasks. There are three tabs: PlanEnroll Leads, SOA 48-Hour Rule (Health products only), Reminders, and Unlinked Calls.



PlanEnroll Leads

Consumers who visit an agent's PlanEnroll Agent Website can fill out a form to request a call directly from the agent. The request creates a Contact in Integrity for the agent and shows it on the PlanEnroll Leads tab so the agent can follow up quickly.



SOA 48-hour Rule (Health Contacts only)

Displays a Contact's SOA status and a 48-hr tracker showing when the agent can compliantly contact them regarding plan information.

Reminders

Follow-up items the agent has created for their Contacts, including notes and due dates / times.

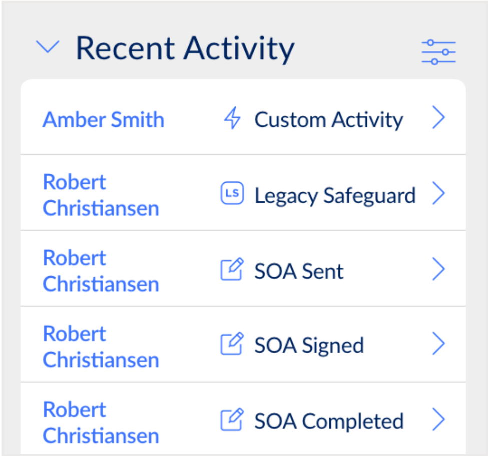
Unlinked Calls

Recordings of incoming made calls to the agent's Integrity Phone Number that need to be linked to a Contact record. Click "Link to Contact" to link to an existing Contact or add a new one.

Getting Started Guide

Dashboard

Recent Activity



Located below the Task List, the Recent Activity list shows the Contacts records tha have most recently had an update made or an action taken – by the agent, by the Contact on PlanEnroll, or automatically by Integrity. Updates can include changes Contact details or sales Stage, recorded calls made to or from the Contact, and more.

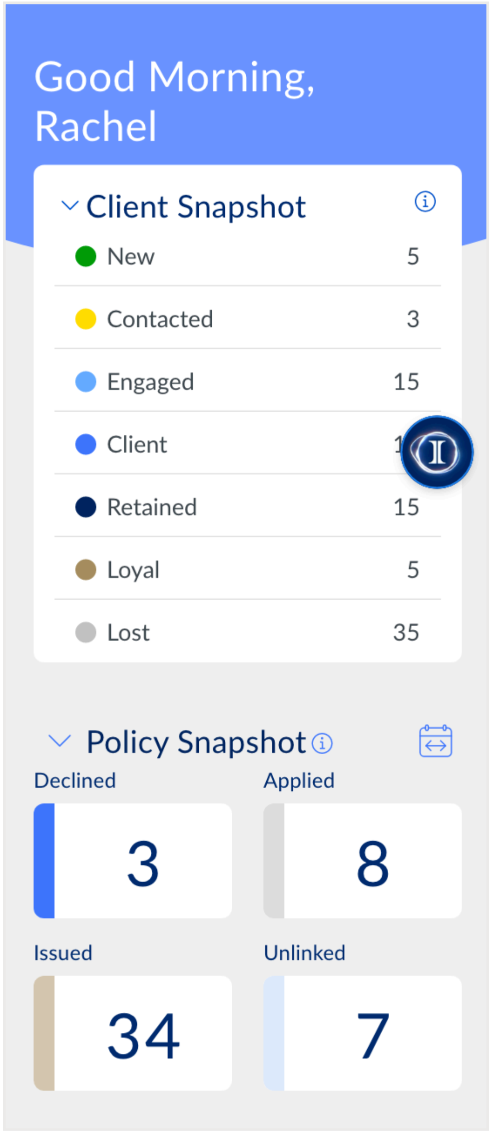
Download the Integrity for Agents Mobile App

The Integrity for Agents mobile app brings all the features of the Integrity web experience to an agent's iOS or Android device, PLUS an extended set of features to make staying in touch with their Contacts easier and more powerful.

Features of the Integrity for Agents mobile app:

- Contact Import
  - Easily create Contact records in Integrity from Contacts on the agent's device
- Push Notifications
  - Calls made to the Agent Phone Number – including real-time call leads from LeadCENTER and PlanEnroll - create push notifications that open the Integrity for Agents app
- Call Information
  - The mobile app shows everything that's known about an incoming call, including any existing Contact Details, lead campaign information from LeadCENTER, and more – so an agent is prepared to answer the call
- Call Scripts
  Required disclosure statements for compliance
- Ask Integrity
  - Contact Information Summaries
  - Call Summaries
  - Call Transcripts
- In-person recording
  - Record in-person sales visits for use in sales

The Integrity for Agents app is available in the App Store and Google Play. It's free to download and use, and all changes made on the app and the web are synced.



Available on the App Store

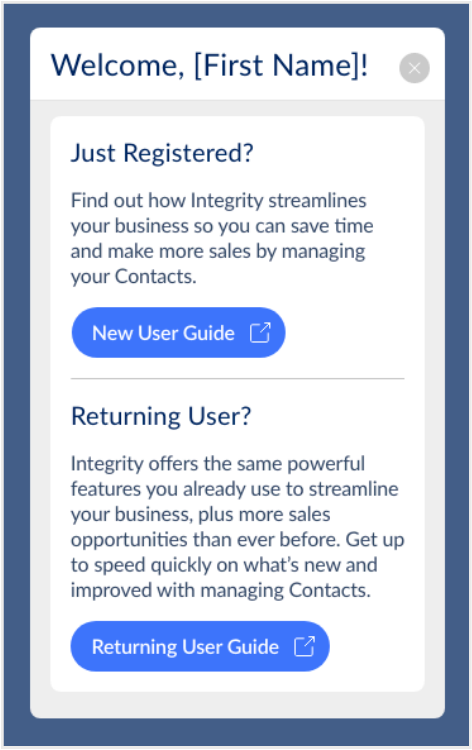
GET IT ON Google Play

Learning Center

Training Resources

The Learning Center provides agents with up-to-date training resources, including how-to guides, carrier lists and webinars, to help them get the most out of managing their Contacts with Integrity.

Click Learning Center in the top bar, and make sure to check back often for new webinar dates.



INTEGRITY

2024 Final Expense Carrier Chart

This chart will be updated often as new carriers become available

Final Expense Carrier	Available to Quote	SSO Link to Apply
Aetna	✓	–
AFLAC	✓	–
AIG - Guaranteed Issue	✓	–
AIG - Simplified Issue	✓	–
American Amicable	✓	✓
Columbia	✓	✓
Foresters	✓	–
Gerber	✓	–
Great Western\Wellabe	✓	✓
Guarantee Trust Life (GTL)	✓	–
Liberty Bank	✓	–
Mutual of Omaha	✓	✓
Prosperity Life	✓	–
Royal Neighbors	✓	✓
Transamerica	✓	✓

INTEGRITY

2024 Health Carrier Comparison Chart

This chart will be updated often as new carriers become available

Gold and bold indicates this carrier offers HRA/VBE

MA/PDP Carrier	Contacts	MedicareAPP	MedicareLINK	CSG APP
Aetna	✓	✓	✓	✓
Aetna Allina	✓	✓	✓	✓
Agewell NY (Molina)	✓	✓	✓	–
Alignment	✓	✓	✓	–
Amerigroup (Elevance)	✓	✓	✓	–
Anthem	✓	✓	✓	–
Apex	✓	✓	✓	–
ATRIO	✓	✓	–	–
AultCare	✓	✓	–	–
Banner Health	✓	✓	✓	–
BCBS AZ	✓	✓	–	–
BCBS AR	✓	✓	–	–
BCBS KC	✓	✓	–	–
BCBS MI	✓	✓	✓	–
BCBS MN	✓	✓	–	–
BCBS NC	✓	✓	✓	–
BCBS NJ (Horizon)	–	–	✓	–
BCBS RI	–	–	✓	–
BCBS SC	✓	✓	–	–
Blue Care Network	✓	✓	–	–
Brand New Day	✓	✓	✓	–
BS California	✓	✓	✓	–
Cambia (Regence)	✓	✓	–	–
Capital Blue Cross	✓	✓	✓	–
Care N' Care	✓	✓	✓	–
Care Partners of Connecticut (Point32)	✓	✓	–	–
CareFirst BCBS	✓	✓	✓	–
CareSource	✓	✓	–	–
CDPHP	✓	✓	–	–
Centene	✓	✓	✓	–
Central Health Plan	✓	✓	–	–
Cigna	✓	✓	✓	✓
ClearSpring	✓	✓	✓	–
Clever Care	✓	✓	–	–
Clover Health	✓	✓	✓	–
Commonwealth Care Alliance (CCA)	–	–	✓	–
Connecticare	✓	✓	✓	–
CVS/Caremark/Silverscript	✓	✓	✓	✓
Denver Health Medical Plan	–	–	✓	–
Devoted	✓	✓	✓	–
EmblemHealth	✓	✓	✓	–
Essence	✓	✓	–	–
Eternal Health	✓	✓	–	–
Experience Health (BCBS NC)	✓	✓	–	–
Fallon	–	–	✓	–
Fidelis (Wellcare)	✓	✓	✓	–
Florida Blue	✓	✓	✓	–
Freedom/Optimum	✓	✓	✓	–

MA/PDP Carrier	Contacts	MedicareAPP	MedicareLINK	CSG APP
Geisinger	✓	✓	✓	–
GlobalHealth	✓	✓	✓	–
Gold Kidney	✓	✓	–	–
Harvard Pilgrim (Point32)	✓	✓	✓	–
HCSC BCBS IL	✓	✓	✓	–
HCSC BCBS MT	✓	✓	✓	–
HCSC BCBS NM	✓	✓	✓	–
HCSC BCBS OK	✓	✓	✓	–
HCSC BCBS TX	✓	✓	✓	–
Health Alliance Medical Plans (HAMP)	✓	✓	✓	–
Health Alliance Plans of MI (HAP)	–	–	✓	–
Health New England	✓	✓	–	–
Health Partner's Plans (HPP)	✓	✓	✓	–
Health Partners MN	✓	✓	–	–
Health Team Advantage (HTA)	✓	✓	–	–
HealthSun	–	–	✓	–
Highmark	✓	✓	✓	–
Humana	✓	✓	✓	✓
IBC/IBX	✓	✓	✓	–
Imperial Health	✓	✓	–	–
Indiana University Health Plans (IU Health)	✓	✓	–	–
Jefferson Health Plans (HPP)	✓	✓	✓	–
Kaiser Permanente	–	–	✓	–
KelseyCare	✓	✓	✓	–
Mary Washington Health	✓	✓	–	–
Mass Advantage	–	–	✓	–
Mass General Brigham	✓	✓	–	–
Medica	✓	✓	–	–
Medical Mutual of Ohio (MMO)	✓	✓	–	–
MediGold	✓	✓	–	–
Memorial Hermann	–	–	✓	–
Moda/Summit	✓	✓	–	–
Molina	✓	✓	✓	–
Mutual of Omaha (MoO)	✓	✓	✓	–
MyTruAdvantage (SIHO)	✓	✓	✓	–
Nascentia	✓	✓	–	–
Network Health	✓	✓	–	–
Oscar	✓	✓	✓	–
PacificSource	✓	✓	✓	–
Paramount	✓	✓	–	–
Point32	✓	✓	✓	–
Premera (Regence)	✓	✓	–	–
Presbyterian	✓	✓	–	–
Priority Health	✓	✓	✓	–
Providence	✓	✓	✓	–
Regence	✓	✓	–	–
SCAN	✓	✓	✓	–
Scott & White Health Plan	✓	✓	✓	✓
Select Health	✓	✓	✓	–
Sentara	–	–	✓	–
Simply Health (Elevance)	✓	✓	✓	–

MA/PDP Carrier	Contacts	MedicareAPP	MedicareLINK	CSG APP
Sonder Health	✓	✓	–	–
Southeastern Indiana Health Organization (SIHO)	✓	✓	✓	–
Summacare	✓	✓	–	–
THP	✓	✓	–	–
Troy Medicare	✓	✓	–	–
Tufts (Point32)	✓	✓	✓	–
UHC	✓	✓	✓	–
Ultimate Health Plans (UHP)	–	–	✓	–
University of Utah Health Plans (UofU)	✓	✓	–	–
UPMC	✓	✓	✓	–
Viva	✓	✓	–	–
Wellcare/Allwell	✓	✓	✓	–
Wellmark	✓	✓	–	–
Zing Health/Lasso	✓	✓	✓	✓

Med Supp Carrier	CSG APP
Aetna/Accendo	✓
Allstate Health Solutions	✓
BCBS of North Carolina	✓
Elips/Lumico	✓
Great Southern Life	✓
Heartland National	✓
Medico	✓
Montana Health Co-Op	✓
Mutual of Omaha (MoO)	✓
Oxford	✓
THP	✓
UnitedHealthcare	✓
WoodmenLife	✓