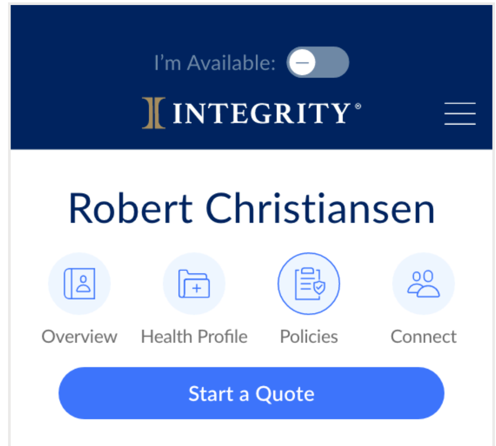
What's New Guide

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

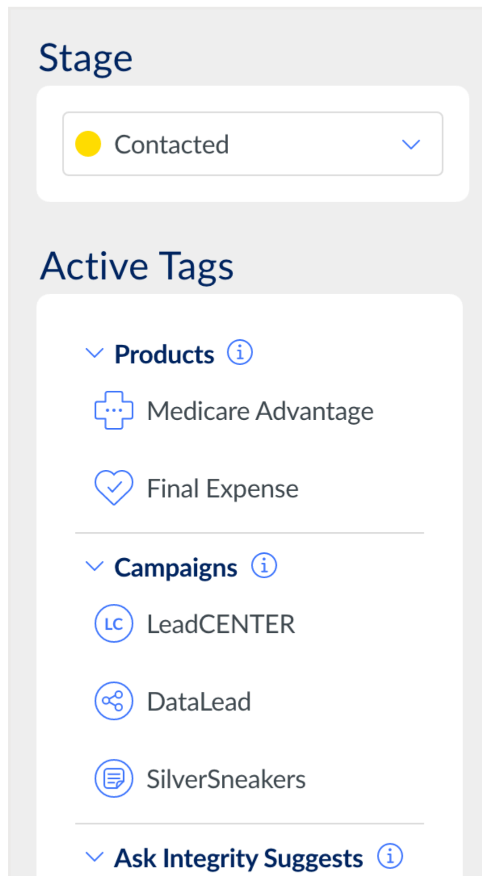
The Stage dropdown helps agents track where the Contact is in the sales cycle. Stages are either updated automatically by Integrity or manually updated by the agent. The choices, in chronological order based on sales cycle, are:

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

Loyal: Three or more years of renewals/history, plus at least one active or in-progress policy (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.

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.

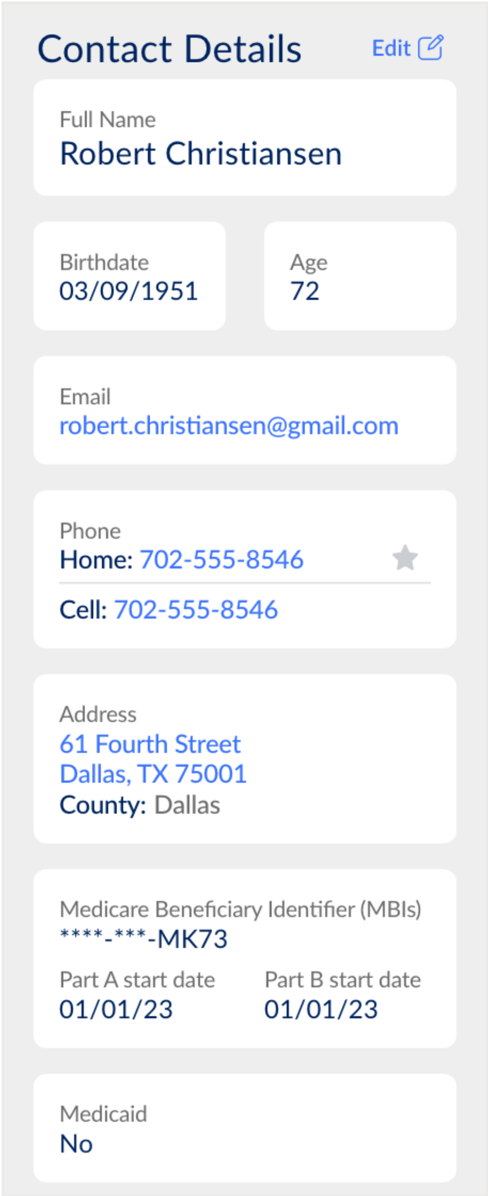
Tag categories:

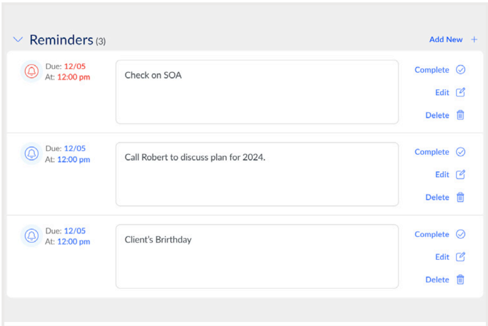
- Product Type
- Lead Campaign information from LeadCENTER
- Ask Integrity Suggests
- Custom

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.





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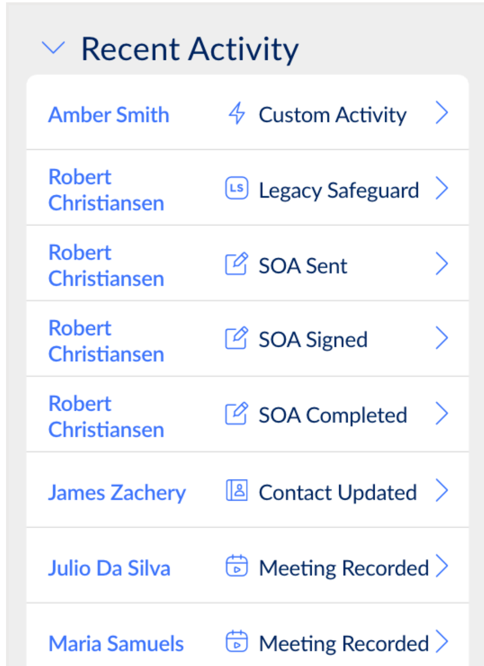
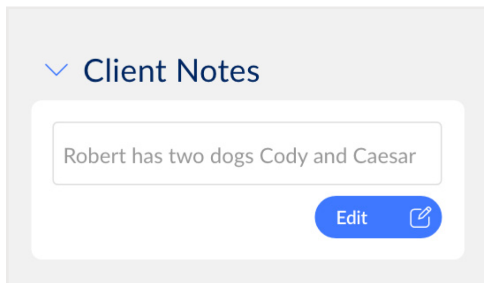
Contact Details include:

- 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)





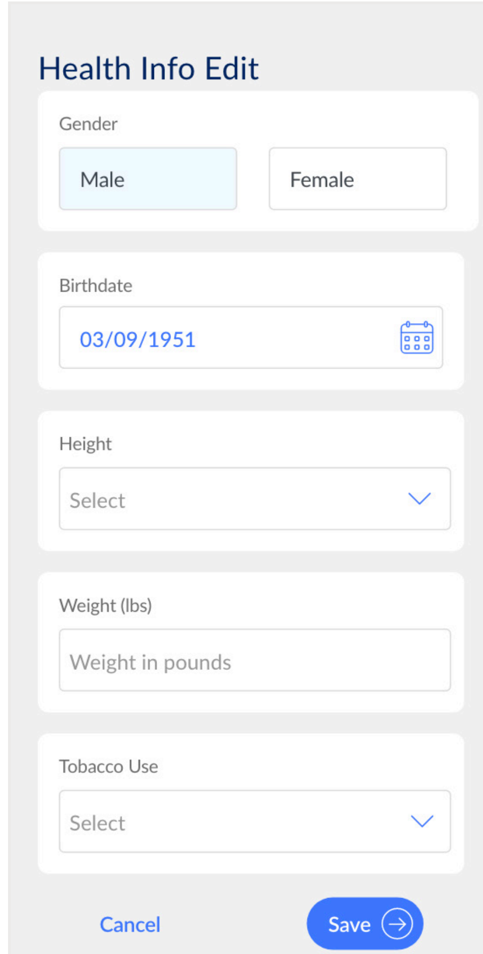
Reminders

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

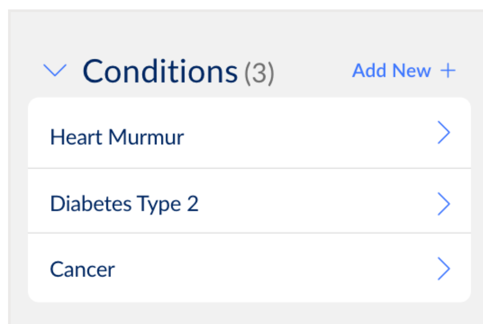
The Client Notes field is for high-level notes about the Contact that the agent would like to check quickly — for instance, the names of the Contact’s family members or other details the agent would like to remember with just a quick glance. Please note: This field is not intended for Personal Health 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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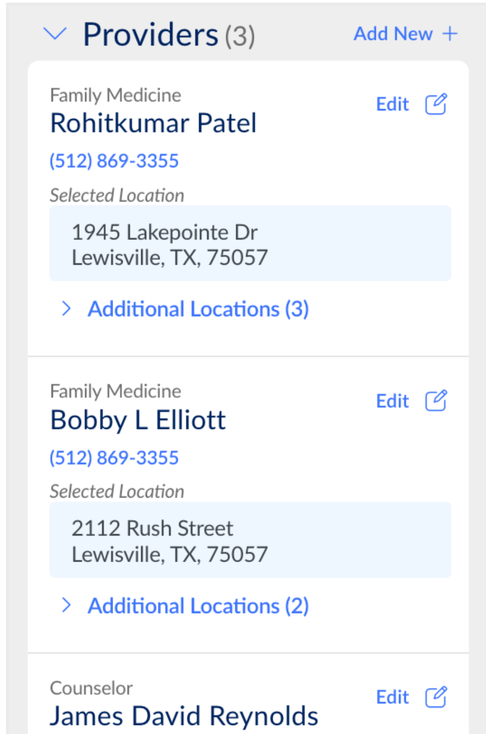
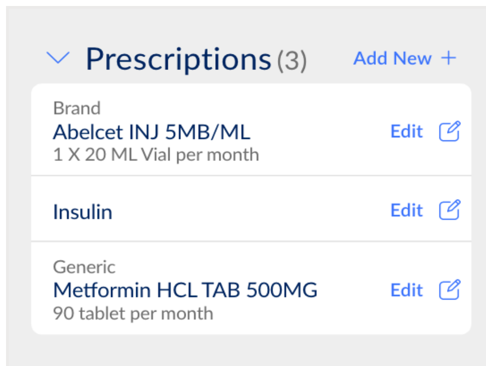
Prescriptions

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.



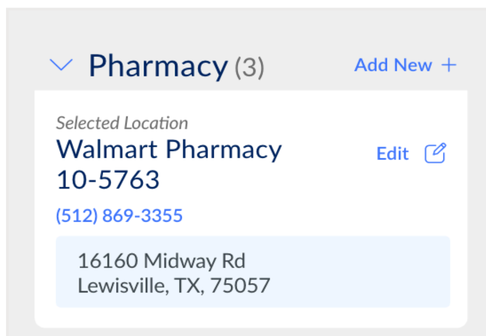
Health Conditions

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).



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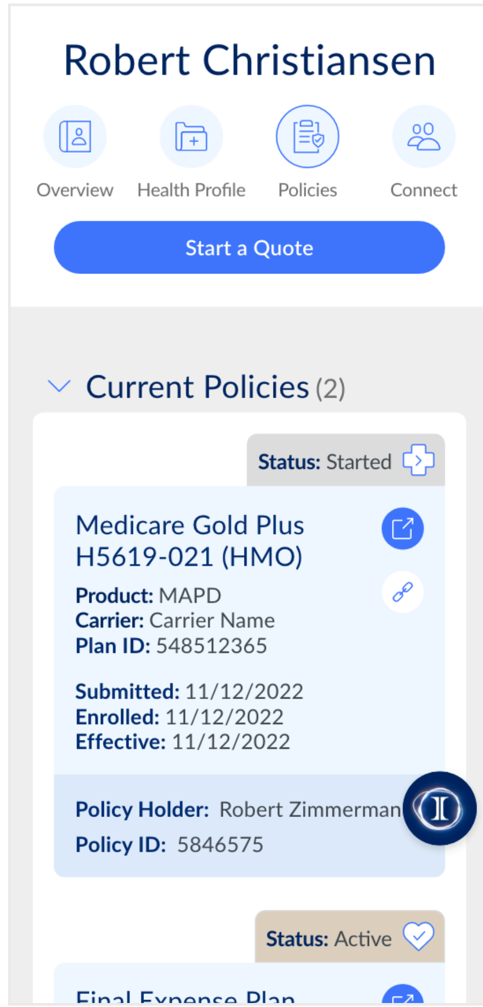
Agents will only see policies they have sold to their Clients through their Integrity upline. They will not see any policies purchased by their Clients through other agents, or through contracts outside of Integrity.

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.