# MedicareCENTER Mobile App

Downloading the MedicareCENTER Mobile App

To get started, navigate to the App Store if you are using an iPhone, or to the Google Play store if you are using an Android device. Once in the store, search for "MedicareCENTER" and click "download" or "install."

Log In or Create an Account

Once installed, click to launch the app. In the app, you will see two options: "Sign Up" or "Login." If you have already created a MedicareCENTER.com account, select "Login" and enter the same information you use to log in on MedicareCENTER.com. Otherwise, select "Sign Up."
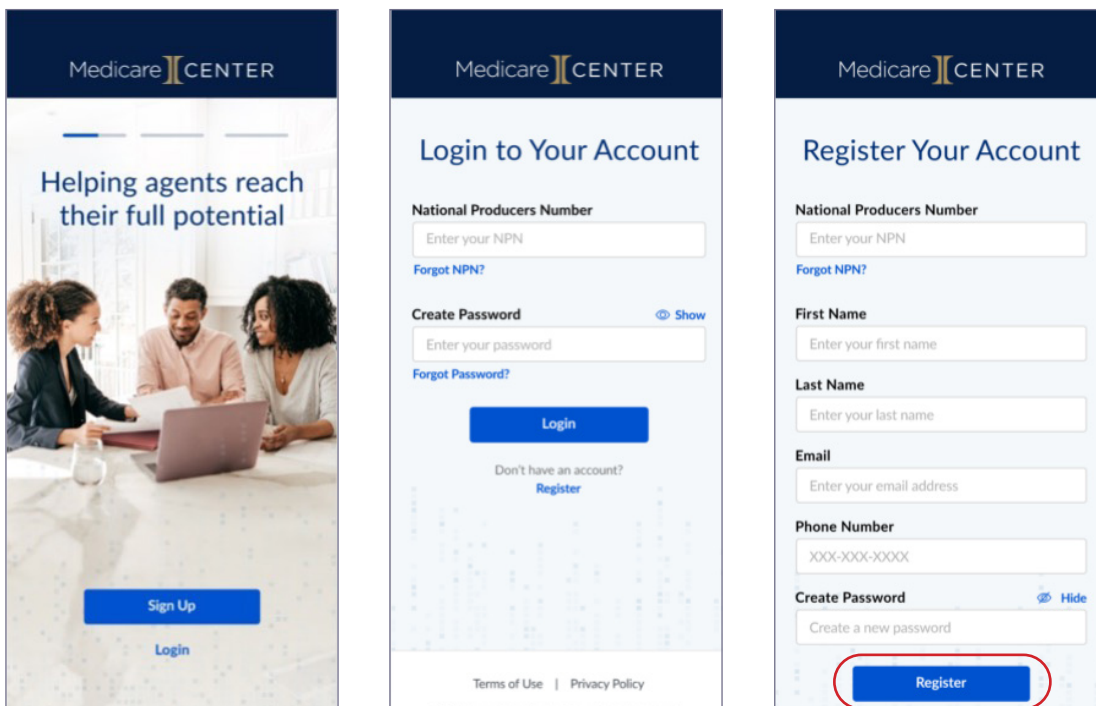

To register for a new account, enter your National Producer Number (NPN), first name, last name, email address, and phone number. Please note that this phone number will be used to generate your MedicareCENTER Agent Number, so use a phone number with an area code you want to use with clients. Finally, create a password!

Confirm Your Account

If you created a new account, you will receive an email to confirm your account. Click to confirm your registration and you're good to go!

Dashboard

Upon successfully logging in, you will be taken to your MedicareCENTER Mobile App Dashboard. On this dashboard you will see several useful summaries of your MedicareCENTER profile. This includes:
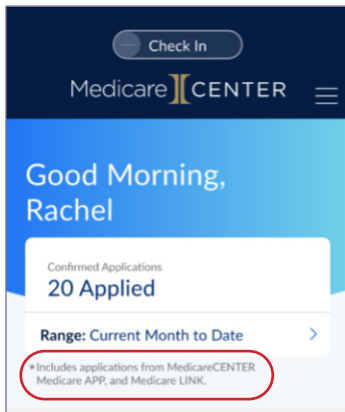
Submitted applications with date range options. The "range" option allows for the selection of a few different date summaries. This application count is a combined total, including all apps submitted through MedicareAPP, MedicareLINK, or directly through MedicareCENTER's CRM.


A client snapshot of lead life cycle stages from "New" all the way to "Applied." Clicking any of these life cycle stages will open a list of pre-filtered contact records matching the selected stage.

Dashboard Activity Stream and Recorded Call Log

In addition to your application counts and lead life cycle stages, you will also see "Recent Activity." This is a stream of activities capturing your interactions with your clients, including stage stages, reminders added, SOAs completed, and more.
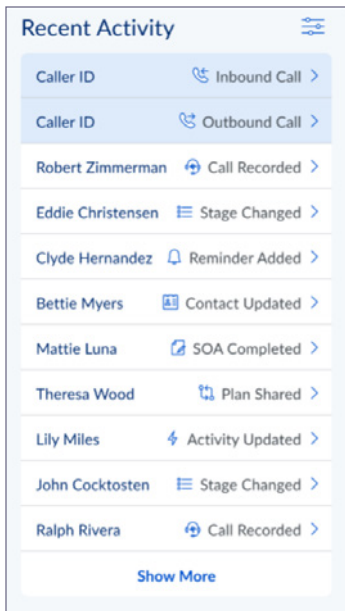
Medicare CENTER

Also under "Recent Activity" you will see a color-coded list of calls not yet linked to a contact record. This allows you to take calls to your MedicareCENTER Agent Number at any time, whether or not you are logged in to the Mobile App or MedicareCENTER.com, and then link that call to a new or existing contact record.
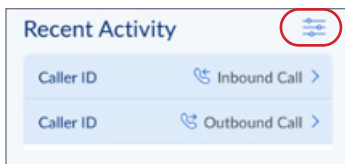

This list of recorded calls will always stay at the top of your "Recent Activity" stream until linked to a contact. Activities can be filtered by clicking the filter icon on the top right of the list.

## Linking Call Recordings to Contact Records

To link an unlinked call from the "Recent Activity" stream to a contact, simply click the call record. This will show you details about the call, including the incoming number, important tags — for calls routed to you as part of a lead campaign — and the required CMS call script. Additionally, you will see an option to download the call.

Here, you can select to create a new contact or search existing contacts. Upon creating a new contact or selecting a contact record already in your Medicare-CENTER CRM, this call recording and activity stream entry will appear on that contact's profile.
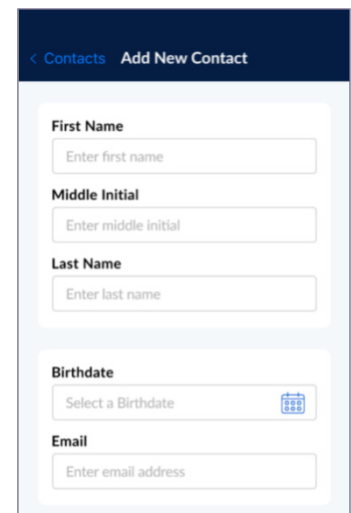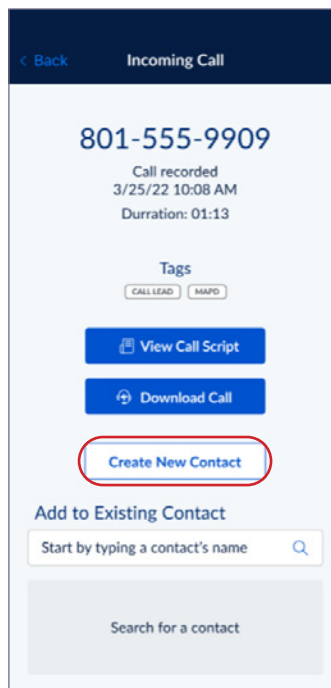
Primary Menu

On the Dashboard and throughout the Mobile App, you will see a "Primary Menu" icon in the top right of your app. This menu allows you to access your account page, as well as Universal Log In for LeadCENTER, CSG App, MedicareAPP, and MedicareLINK.
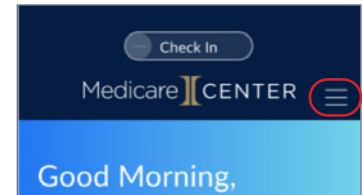
Real-Time Lead "Check In"

One of the most exciting features of the MedicareCENTER Mobile App is the ability to "Check In" to receive timely leads directly to your mobile device. To do this, simply toggle the "Check In" slider at the top of your screen.

You will then see a set of options:

- Call Number — the phone number you'd like to route recorded lead calls to
- Lead Type — allowing you to select between inbound (call) leads and outbound (data) leads
- Lead Source — including LeadCEN-TER and your MedicareEnroll.com Personal Agent Website

Note: Please make sure you have set up your real-time lead campaigns within LeadCENTER. This will enable you to receive your correct purchased leads from the areas you would like to serve. This can easily be done from either the Mobile App or MedicareCENTER.com by clicking the LeadCENTER link from the primary menu or clicking "Setup" from the Lead Source option after checking in.
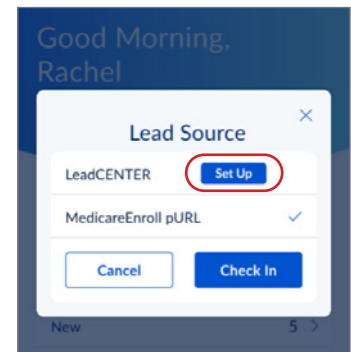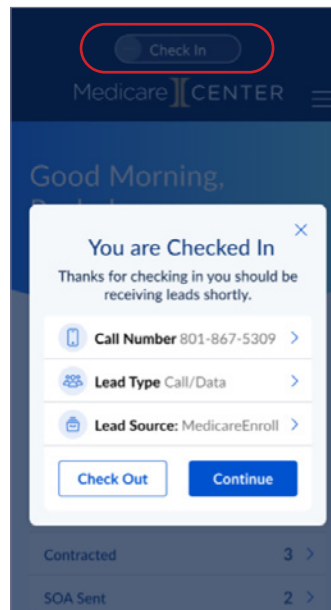
Contact List — CRM

To view your full list of contacts, you can select "Contacts" from the primary menu located at the top right of the Mobile App. Here, you will see a snapshot of your client list, including current life cycle stage. You can select list or card view, depending on whether you would like to easily access additional preview data, including reminders and tags, or sort and filter.

One of the most exciting features available in both the Mobile App and MedicareCENTER.com is the ability to filter by Tags. Tags are created for several important reasons, including analytics-driven recommendations on how likely a client is to switch from their current plan (Switcher), what products they are interested in, or what type of lead or marketing campaign they were generated by.
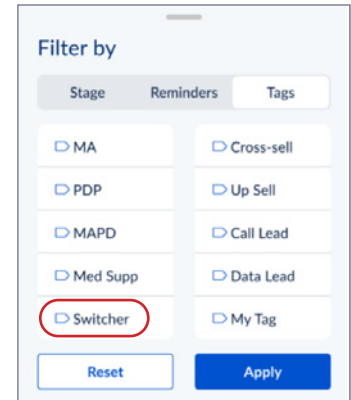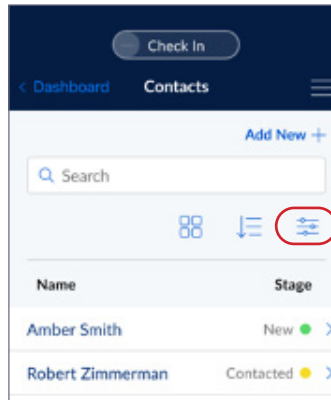
Create a Contact

From the Contact List, you can create a new contact by clicking "Add New" in the top right corner of your Mobile App. It is recommended that, when creating a new contact, you include as much information as possible about your contact. This allows you to more easily link activities, track potential duplicates, and manage your ongoing relationship with your client!
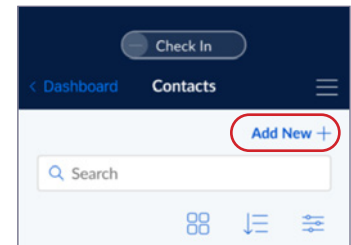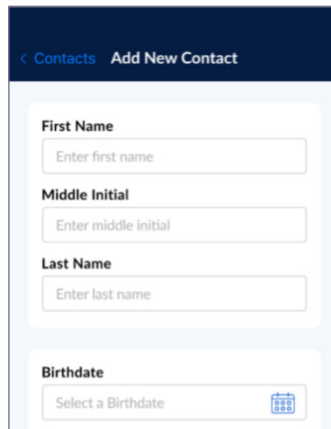
Create a Contact

Once a contact is created, you are able to track your relationship and interactions with this client, manage SOAs, set reminders, create notes, and quote and enroll them in plans.

Upon opening a contact record, you will see a new sub menu across the bottom of the Mobile App showing "Overview," "Details," "SOA," and "Preferences." These subsections for each contact allow you to organize your contact's information more easily.
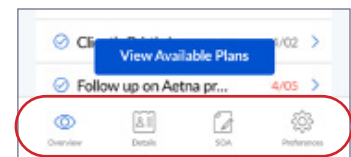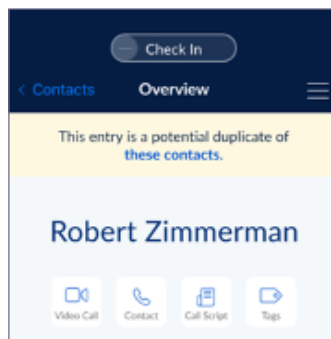
Additionally, you will see your primary communications options across the top of the contact record. Here is where you can launch a Video Call using your phone's built-in video capabilities (Facetime on iPhones and Google Duo on Android devices), launch a recorded call, view the CMS-required call script that must be read within the first minute of any client call, and quickly access your contact's tags.

Reminders are a powerful feature that allows you to set the next step and tasks with due dates, allowing you to stay on track and engaged with your clients. You can enter as many reminders as needed, assigning each a specific due date.
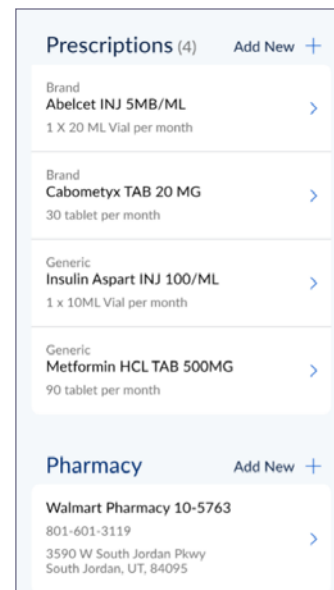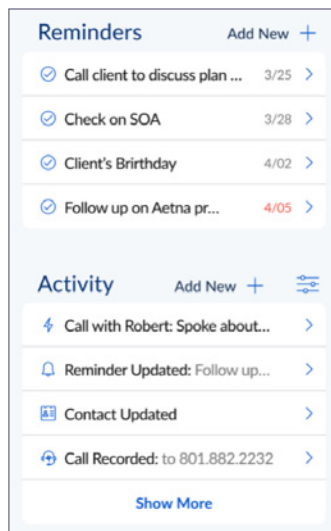

The activity stream gives you an ongoing stream of insight and context, showing you your history of interactions with your client. Many entries in the activity stream are generated automatically, like stage changes or recorded calls, but you can also enter your own activities by clicking "Add New"!

Contact Details is where you can easily add your client's preferences, allowing you to more quickly and efficiently deliver accurate quotes that fit their needs. This includes pharmacy preferences, providers, and RX information.

Start a Recorded Call

When you are ready to connect with your client, the MedicareCENTER Mobile App makes it easy to connect using your recorded MedicareCENTER Agent Number. To start a recorded call, simply click "Contact" from your client's contact profile. This will trigger the MedicareCENTER Virtual Operator to first call your phone — whichever number you have set as your "Call Number" within your profile settings. Once you answer the call, the Virtual Operator will call your client and connect you! It's as easy as that!
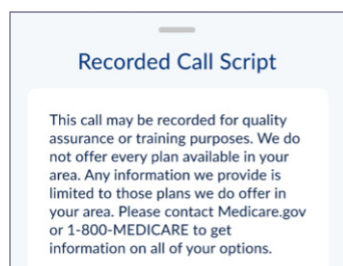

The CMS-required script will show automatically, and all your calls recorded this way will appear on the client's contact record "Activity Stream."

Running a Quote and Completing an SOA

When you're ready to run a quote, you can click "View Available Plans" from your client's contact record.

Here, you will see all the plan options available to your client. This list of options takes into consideration only the plans you are licensed to sell, and only those available to the client based on their entered zip code.

Here you can easily view, compare, and share plan details with your client. However, don't forget to first complete a "Scope of Appointment" or SOA with your client. This can be done by clicking "SOA" in the contact's sub menu at the bottom of the Mobile APP. SOAs can be shared and signed with clients via text/SMS or email!
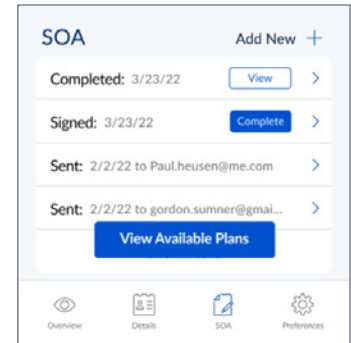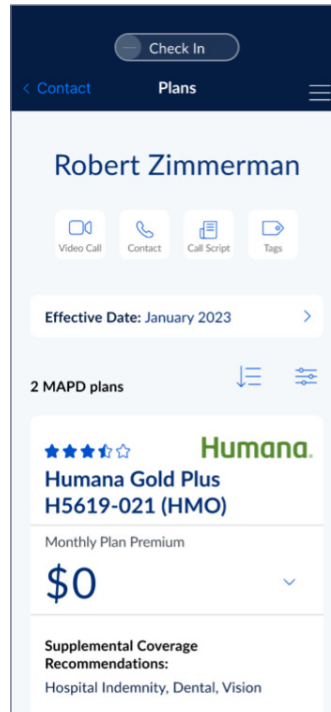
Complete and Submit Application
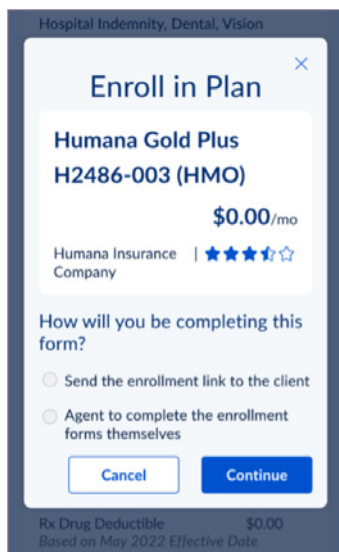
Once you have selected the best plan for your client, you can click "Enroll" from the quoted plan list. This will take you to carrier-specific enrollment forms that may require a few additional pieces of data from you or your client. This can be completed by you as the agent representing your client, or sent to the client to enroll themselves!