

Medicare Supplement Transition

Transitioning Quote & Application Processing from Connecture to
Broker Portal

Transition Overview

Medicare Supplement quoting and application processes are moving from Connecture to Broker Portal.

The transition aligns Medicare Supplement workflows with all other U65 and DentalVision products with the goal of creating a more streamlined and consistent experience for agents.

What's the Impact?

Minimal Impact – The overall quoting process will align with the current process used today for all U65 and DentalVision products currently available in Broker Portal.

- Medicare Supplement quote and application link timelines will align with all other products.
 - Quotes are valid for 30 days
 - Application Transfer Link will automatically send with the quote
 - The Application Transfer Link is valid for 72 hours at a time and can be resent directly from the quote page

Benefits of Transition

Consistency – You will now have one system to enter all quotes and applications.

Insight – Broker portal applications offer reporting previously unavailable in Connecture. More insight means more knowledge!

Efficiency – Having one system means processing ALL applications the same way creating better ease of use over time.

Key Differences

Expected Medicare Part A & B effective dates will be required to generate a quote.

A **valid email address** will be required during the quoting process.

Health questions will **only display when required** based on the applicant's eligibility criteria.

Next Steps

- Additional communication regarding transition timelines and scheduled go-live date
- Training resources will be distributed prior to go-live to include a recorded training video