

AEP 2023

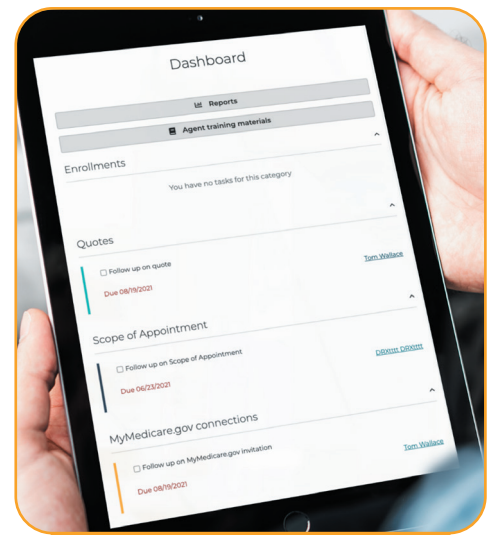
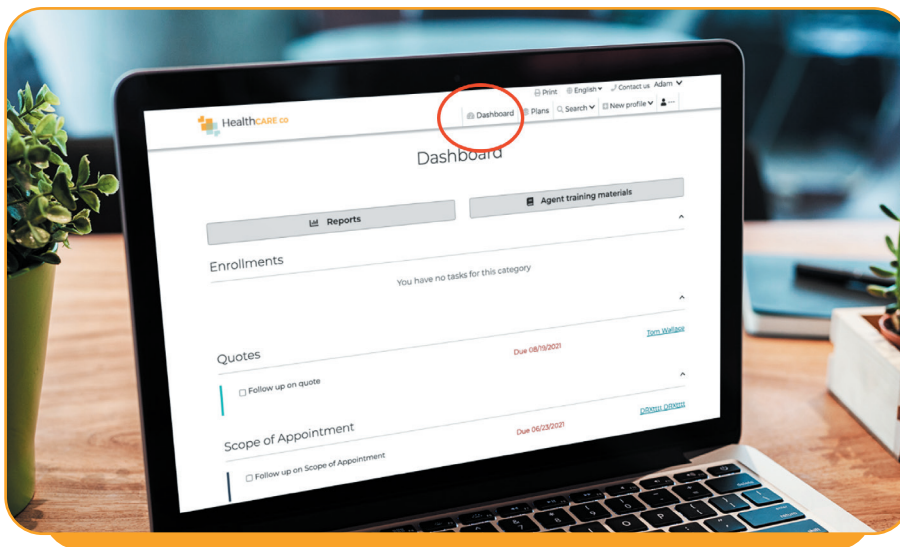
Agent Dashboard and Reports

The **Agent Dashboard** empowers agents to manage their day-to-day work efficiently. Agents can view their open tasks, and access reports and training materials. While working with the beneficiary, agents are prompted to add follow up tasks after sending an SOA, MyMedicare.gov connection, quote or enrollment application. Tasks are displayed on the Dashboard by category and sorted by due date.

Tasks include the following:

- Enrollments
- Personalized Quotes
- Scope of Appointments
- MyMedicare.gov connections
- Other

For each task, agents can click the Profile name to open the beneficiary's profile and get to work quickly and easily. Once an enrollment is completed or the beneficiary completes their MyMedicare.gov invitation, the Dashboard cleans up tasks for the agent. Agents can complete their tasks from the Dashboard or Profile page.



Access the Agent Dashboard
from the top header.

Agents can run reports for beneficiary profiles with a completed application, HRA or Scope of Appointment (SOA).

Reports

Submitted date range: From 08/10/2021 To 08/14/2021
Date range must be 7 days or less.

Type: Enrollment Enrollment type: Medicare

Run report

Download results

Sort: Last name Filters

Jane Doe 123 Test St Apt 2 Los Angeles, CA 94904	beneficiary@connecture.com (212) 555-1212	Applicant	Bill Broker billbroker	Updated 08/23/2021
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← Previous

Agent training materials

Documents

- [Adding Preferences via Guided Help](#)
- [Provider Search](#)
- [Building a Medicine Cabinet via MyMedicare.gov](#)
- [Increase Enrollments with your Shopping Link](#)
- [Sending Personalized Quotes](#)
- [Medicare Shopping, Quoting and Enrollment](#)
- [Text to Enroll](#)
- [Electronic Scope of Appointment](#)
- [Medicare Supplement Plans](#)
- [All Plans View and Filter by SNP Plans](#)
- [FAQs](#)
- [Provider Type Definitions](#)

Videos

- [Adding Preferences](#)
- [Provider Search](#)
- [Building a Medicine Cabinet via MyMedicare.gov](#)
- [Shopping Link \(Personalized URL\)](#)
- [Personalized Quoting](#)
- [Send to Beneficiary - Text and Email to Enroll](#)
- [e-Scope of Appointment](#)
- [Medicare Supplement Shopping](#)
- [All Plans Display](#)
- [SNP Filtering](#)

Agent Training Materials can be accessed from the Dashboard.



Contact Us

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