1. **Opening created Beneficiary profiles**
    a. If the Profile is already completed for the beneficiary, you will need to search for them.
        i. Press Search Profile
        ii. Press Search Benificiary
        iii. Type in the first and last name of the client
        iv. Press Search Profiles
        v. Press on the name of the Beneficiary.
2. **Adding a Benificiary**
    a. Press New Profile
    b. Press New Benificiary
    c. Fill out the personal information section.
    d. Press Save
    e. Press continue to SOA.
    f. If you do not want to add a Scope of appointment skip section 3 of this document.
3. **Adding a Scope of Appointment**
    a. When in the Personal information screen go to the bottom of the screen and press continue to SOA.
    b. If the beneficiary wants to be reached by email
        i. Type in the beneficiary's email in the email address box
        ii. Press email SOA
    c. If the Benificiary wants to be reached by Phone
        i. Type in the Benificiary's phone number in the phone number box
        ii. Press TEXT SOA
    d. Press Add Preferences
4. **Adding preferences**
    a. If you went through adding a scope of appointment and pressed add preferences skip to the adding coverage type section in this document.
    b. Go into the Personal information screen.
    c. Go to the bottom of the screen and press add preferences.
    d. In this screen you can add the type of coverage the beneficiary needs, any previous health issues, providers, Prescriptions, and their Pharmacy
    e. **Adding coverage type**
        i. Select the type of coverage the beneficiary needs then press continue.
        ii. Press continue to go to the Health Section.
    f. **Health section**
        i. Please use the sliding bar at the top of the screen to indicate the beneficiary's health status.
        ii. Select the age of the beneficiary.
        iii. If you would like to see the estimated medical costs press yes, then go to the bottom of the screen and select update answers. Then enter the estimated uses of each service.
        iv. Press continue to go to the provider screen
    g. **Adding a provider**
        i. Type in the zip code and the name of the DR or facility.
        ii. Press search
        iii. Scroll through the list of clinics and select the one the client uses.
        iv. Press continue to go to the Prescriptions screen
    h. **Adding prescriptions**

i. If the client has a MYMedicare.gov account
    1. Type in the client's email in the email section
    2. Press send email
    3. The beneficiary should then be able to go in to mymedicare.gov and bring the prescription information over.
    4. Have the beneficiary sign into MYmedicare.gov. MAKE SURE THEY LOG IN USING THE LINK IN THE AUTOMATED EMAIL Sent to them.

ii. If they do not have a mymedicare.gov account
    1. At the top of the screen type in the name of the medication under prescriptions.
    2. Select the medication from the dropdown menu.
    3. Select the dose and form.
    4. Enter the quantity and frequency the medication is taken.
    5. Press Add
    6. Press continue to go to the Pharmacy Section

i. Adding Pharmacy information

i. Type in the Zip Code and the Pharmacy Name
ii. Press Search
iii. Scroll through the list on the left side of the screen and press add pharmacy.
iv. Press Continue at the bottom of the screen

j. Adding a Scope of Appointment

i. When in the Personal information screen go to the bottom of the screen and press continue to SOA.
ii. If the beneficiary wants to be reached by email
    1. Type in the beneficiary's email in the email address box
    2. Press email SOA
iii. If the Benificiary wants to be reached by Phone
    1. Type in the Benificiary's phone number in the phone number box
    2. Press TEXT SOA
iv. You can also add preferences from here.

5. Opening created Beneficiary profiles

a. If the Profile is already completed for the beneficiary, you will need to search for them.
    i. Search Profile
    ii. Search Benificiary
    iii. Type in the first and last name of the client
    iv. Press Search Profiles
    v. Press on the name of the Beneficiary.

6. **Adding Carrier Permissions**

1. Send the information below to jacob@altruisbenefit.com and he will add the carrier permissions for you.
    1. What Carriers are you requesting?
    2. Is the product Medicare, Med Sup, or Ancillary?
    3. Are SNP plans needed?
    4. What states do you need each carrier in?
    5. What is the Writing number for each carrier?

7. **ADDITIONAL RESOURCES**

a. QUICK QUOTE VIDEO REFERENCE

    i. HTTPS://WWW.YOUTUBE.COM/WATCH?V=Y5ANKGXFANE

b. TEXT AND EMAIL TO ENROLL VIDEO

    i. HTTPS://YOUTUBE.COM/WATCH?V=ASHUINKXODQ