



**New & Improved**

*Medicare Search & Save*





**Search & Save**

Sign In

Email address

Password



Sign In

[| Forgot Password?](#)



Login with LinkedIn


Login with Google


Login with Facebook

[www.pxl.searchandsave.org](http://www.pxl.searchandsave.org)


If you do not have a login, please reach out to us on how you can qualify. 800-541-6705




Profile information is here




Customer Profiles



Scope of Appointment



Import



List Identifier Request

Hello Rick

Profiles

Click here for list of clients

Click here for E-SOA

Click here to import a client list

Click here to create a new client

Click here to have a list of all your clients emailed to you with their unique ID

All Customer Profiles

Welcome to search and save! You can create a new list or select a previously created list below.

Show 10 entries

Search:

Showing 1 to 10 of 202 entries

Previous 1 2 3 4 5 ... 21 Next

List	Customer First	Customer Last	Created By	Created On	Actions
126512	Test	Test	Rick Roberts	April 14th 2022 11:57 am	<a href="#">View List</a> <a href="#">Delete List</a>
125984	D	Wilson	Rick Roberts	April 7th 2022 11:55 am	<a href="#">View List</a> <a href="#">Delete List</a>
125113	P	Middleton	Rick Roberts	April 5th 2022 05:44 pm	<a href="#">View List</a> <a href="#">Delete List</a>
121235			Rick Roberts	February 18th 2022 09:54 am	<a href="#">View List</a> <a href="#">Delete List</a>
119173			Rick Roberts	January 20th 2022 06:28 pm	<a href="#">View List</a> <a href="#">Delete List</a>

[Add A New Client](#)

Recently Viewed Profiles

Test Test

[View List](#)

P Middleton

[View List](#)

D Wilson

[View List](#)

Rick Roberts

[View List](#)

123814

[View List](#)

123807

[View List](#)

54195

[View List](#)

118346

[View List](#)

123021

[View List](#)

121548

[View List](#)

The is the main page that comes up after logging into the site. The "Profile" page is where you can update your personal information and change your password and set up the 2-Step authentication. To create a new client profile, you will want to click on the blue button "Add a New Client". Also, on the right had side you will see the "Recently Viewed Profiles" tab where you can quickly access a list that you recently created or viewed.

The image shows a 'Create New List' dialog box overlaid on a blurred background of a web application. The dialog box has a title bar with 'Create New List' and a close button (X). Below the title bar, there is a prompt: 'Please enter the **customers** name to create a new list.' This is followed by two input fields: 'First Name' containing 'John' and 'Last Name' containing 'Doe'. At the bottom right of the dialog are two buttons: a white 'Close' button and a blue 'Create New List' button. In the background, a dark blue button with a person icon and the text 'Add A New Client' is visible, along with a 'Search:' input field and a pagination bar at the bottom showing 'Previous', '1' (highlighted), '2', '3', '4', '5', '...', '21', and 'Next'.

Once you click on the “Create New Client” button you will see this window pop up and you will input the client first name and last name and hit the blue button “Create New List”

### Location and Plan Year

Please enter a zip code and select a county and plan year to continue.

Zip Code	<input type="text"/>
County	<input type="text" value="Select"/>
Plan Year	<input type="text" value="2022"/>
Subsidy	<div>Medicare costs can be reduced to account for Medicare's low income Subsidy to help pay prescription costs.</div> <div><input type="radio"/> Yes</div> <div><input checked="" type="radio"/> No</div>

Update

The next step is to fill out the customer information to the right. If you are not wanting to do that and are just trying to do a simple PDP or MA quote then you can just fill in the information above with their Zip code, Country, and Plan Year under the tab “Locations and Plan Year”. In either section once you have inputted the information needed you do have to click on the “Update” blue button to save the information.

### Please Select Information

					Customer Status
					<input type="text" value="Please Select"/>
Salutation	First name	Middle	Last name	Suffix	
<input type="text" value="Select"/>	<input type="text" value="Test2"/>	<input type="text"/>	<input type="text" value="Test2"/>	<input type="text" value="Select"/>	
Nickname	Age		Tobacco Use		
<input type="text"/>	<input type="text"/>		<input type="text" value="Select"/>		
Spouse					
<input type="text" value="Spouse List Lookup"/>					
Address				County	
<input type="text"/>				<input type="text"/>	
City	State		Zip		
<input type="text"/>	<input type="text" value="Select"/>		<input type="text"/>		
Gender	Social Security Number		Birthday	Deceased Date	
<input type="text" value="Select"/>	<input type="text"/>		<input type="text" value="mm-dd-yyyy"/>	<input type="text" value="mm-dd-yyyy"/>	
Drivers License #	Drivers License Exp		Email address	Alt Email address	
<input type="text"/>	<input type="text" value="mm-dd-yyyy"/>		<input type="text"/>	<input type="text"/>	
			Primary email address.	Alternate email address.	
Cell Phone	Phone				
<input type="text"/>	<input type="text"/>				
Medicare Number					
<input type="text"/>					
Medicaid Level					
<input type="text" value="None"/>					
Medicare Part A Start Date			Medicaid Number (If Applicable)		
<input type="text" value="mm-dd-yyyy"/>			<input type="text"/>		
			Medicare Part B Start Date		
			<input type="text" value="mm-dd-yyyy"/>		
Update					

List 126514

Dashboard

Customer Details

Policies

Friends & Family

Calendar

Documents

Notes

Customer Policies

Search:

EXCEL

Add policy

Policy #	Holder Name	Coverage Type	Carrier	Carrier Products	Status	Effective Date	Renewal Date	Servicing Agent	Actions
No data available in table									

You will see under the “Dashboard” tab you will have access to these new features that include:

**Policies** – This is where you can add policy information

**Family & Friends** – You can add information on their family and/or friends

**Calendar** – You can use this for scheduled appointments, birthdays, or any other important dates you would like to keep track of.

**Documents** – This is where you will be able to create folders and upload documents to the system that can be viewed or downloaded when needed. (Secured Data)

**Notes** – This where you can add any special notes on the client or related policies.

Dashboard

Drug List5

Pharmacies1

MAPD & PDP Plans29

Provider Search

Facility Search

Med Supp

Ancillary

CMS Blue Button

Customer Details

Policies

Friends & Family

Calendar

Documents

Notes

Customer Policies

Search:

EXCELAdd policy

Policy #	Holder Name	Coverage Type	Carrier	Carrier Products	Status	Effective Date	Renewal Date	Servicing Agent	Actions
No data available in table									

From this screen you will be able to view the list of policies that you have added and edit or download that data in Excel if needed.

Add A New Policy

Policy #

Coverage Type

Please Select

Carrier Products

Effective Date

Date of Sale

Expected Commission

Policy Holder name

Carrier

Status

Please Select

Renewal Date

Monthly Premium Cost

Servicing Agent

Close

Add Policy

This is the data input page for any new policy. Once you have completed all the section with the information that you would like to save, you will click the “Add Policy” blue button to save it.



Dashboard

Customer Details

Policies

Friends & Family

Calendar

Documents

Notes

Click here to add a person

Friends & Family

Search:

EXCEL

Add Friend or Family Member

Last Name	First Name	Phone	Email	Address	Apt or Suite	City	State	Zip	Birthday	Age	Relationship	Gender	Action
No data available in table													

From this screen you will be able to view the list of friends and family that you have added and edit or download that data if needed. This will be used as important contacts and/or referrals

Add Friend or Family

First Name

Last Name

Relationship

Please Select

Gender

Male

Birthday

Phone

Email Address

Address

Apt or Suite

City

State

Select

Zip

Comments / Notes

Close

Add Friend / Family

This is the data input page for any new person. Once you have completed all the section with the information that you would like to save, you will click the “Add Friend / Family” blue button to save it.

List 126514

Dashboard

Customer DetailsPoliciesFriends & FamilyCalendarDocumentsNotes

<>todayAdd Event

April 2022

MonthWeekDayList

Sun	Mon	Tue	Wed	Thu	Fri	Sat
27	28	29				1
3	4	5				2
10	11	12	13	14	15	16

Calendar Event

☐ All Day Event

Title

Add Title

Start Date

03-31-2022

End Date

03-31-2022

Start Time

9:00 AM

End Time

9:15 AM

Notes / Comments

Calendar Color

#417505

CloseAdd Event

This is a full functioning calendar that you can use for appointments, birthdays, or any event that you need to put on a calendar. To add to the calendar, you just need to left click the day you would like to add something and then fill out the title of the event, date, time, and notes/comments. You can also color code special events.

List 126514

Dashboard

Customer Details

Policies

Friends & Family

Calendar

Documents

Notes

126514 Base Folder

Add Folder

Delete Folder

126514 Base Folder

Drop files here to upload

0.3 MB  
HSA-medica...

Delete or download

Drag and Drop

PDF

HSA-medic...

The next tab over from the calendar is the “Documents” tab. Here you will be able to add/delete folders and drag and drop documents into them.

Dashboard

Customer Details

Policies

Friends & Family

Calendar

Documents

Notes

Notes

+

Add A Note

Note

Close

Save Note

Click here to add a note



Add A Note

Note

Close Save Note

This is the notes tab where you can click on the + icon and add a new note. You can add and delete notes as needed. Once you add a note you just need to click on the “Save Note” to save it.

# MAPD and PDP Quotes

[Dashboard](#)

[Customer Details](#) [Policies](#) [Friends & Family](#) [Calendar](#) [Documents](#)

### Location and Plan Year

Please enter a zip code and select a county and plan year to continue.

Zip Code

67401

County

Saline

Plan Year

2022

Subsidy

Medicare costs can be reduced to account for Medicare's low income Subsidy to help pay prescription costs.  
☐ Yes  
☒ No

Update

PL

Sal

Nic

Spr

Ad

Cit

Ge

Dri

To start a PDP or MA quote you need to input the zip code, county, and plan year. You can also select the subsidy level if you know they qualify for one, if not just answer “NO”. Once you enter this information click on “Update” to save this and start the actual quote.

List 126514

[Dashboard](#) [Rx Drug List 0](#) [Pharmacies 0](#) [MAPD & PDP Plans 34](#) [Provider Search](#)

Search for drug by entering the full or partial name.

#Matching Drug Results

metformin hcl

SOLUTION

Quantity

Frequency

Dosage

To Calculate Mail Order: Step One Enter a 30 day quantity. Leave "Frequency" at 1 month Click on the MAPD & PDP tab

Add

Name


After you input the zip code, county, and plan year and hit the update button, you will see a series of tabs that will appear and the first one you will want to click on is the “Rx Drug List”. This is where you will enter their prescription medications. You will need to know the medication, dosage and how often they take it and how often they get it filled.

When you start typing the name of the medication in it will start pulling up some options for you to pick. The quantity, frequency, and dosage will need to be filled in with the correct information. Once you have that entered you can click on the “Add” button and it will add it to the right side under the drug list.



PDF

Name	Dosage	Quantity	Frequency	Actions
metformin hcl	1 Bottle :: 473 ML Per Bottle	1	One Month	<div></div>

This is an example what it looks like when the drug is added to the list. It will show you all the information that you inputted. The  can be used to edit and delete the medication on the list. At the top you will see the PDF icon that can be clicked on and save the drug list as a PDF file.

Dashboard

Drug List 1

Pharmacies 0

MAPD & PDP Plans 34

Provider Search

Facility Search

Med Supp

Ancillary

CMS Blue Button

Search for drug by entering the full or partial name. Test

Pharmacy Filter

20 MI

67401

#Matching Pharmacy Results

1. Srhc Pharmacy

0.4 MI

400 South Santa Fe Street Suite 1121a

Salina KS 67401

785-452-7531

2. Salina Regional Hematology Oncology

0.43 MI

511 S. Santa Fe

Salina KS 67401

785-452-4860

3. Dillon Pharmacy

0.44 MI

1201 W Crawford

Salina KS 67401

785-827-0417

4. Walgreens #5539

0.51 MI

700 S Broadway Blvd

Salina KS 67401

785-827-3974

5. Salina Family Healthcare Pharmacy

0.84 MI

651 E. Prescott

Salina KS 67401

785-452-3300

Selected Pharmacies

MapSatellite

After completing the medications, then next thing to click on is the “Pharmacies” tab. This is where you can select up to three pharmacies within a zip code. If you need a wider area to look at you can adjust that by clicking on the millage dropdown or adjust the zip code. A map will be off to the right side showing where the pharmacies are located in the area.

DashboardDrug List1Pharmacies1MAPD & PDP Plans34Provider SearchFacility SearchMed SuppAncillaryCMS Blue Button

Each column can be sorted Ascending or Descending by clicking on the column header.

MAPDPDPMA ONLY

Carriers

Other Filters

Columns

Plans

Search:

To Calculate Mail Order: Step Two: Select an MAPD or PDP plan. Click "View"

EXCELCOMpare Selected Plans

Compare Checkbox	Plan Name	Plan ID	Premium	Drug Deductible	Mail Order Cost	Est. Drug Cost	Total Est Cost	Agent Portal	Action
<input type="checkbox"/>	Cigna Extra Rx (PDP)	S5617-269	45.70	100.00	2,746.78	2,308.24	2,856.64	<a href="#">Agent Portal</a>	<a href="#">View</a>
<input type="checkbox"/>	Mutual of Omaha Rx Premier	S7126-093	34.10	480.00	4,784.34	2,626.93	3,036.13	<a href="#">Agent Portal</a>	<a href="#">View</a>
<input type="checkbox"/>	Cigna Secure Rx (PDP)	S5617-118	32.20	480.00	2,936.78	2,937.98	3,324.38	<a href="#">Agent Portal</a>	<a href="#">View</a>
<input type="checkbox"/>	Mutual of Omaha Rx Plus	S7126-023	81.40	480.00	4,784.34	2,666.48	3,643.28	<a href="#">Agent Portal</a>	<a href="#">View</a>
<input type="checkbox"/>	SilverScript SmartRx (PDP) S5601-199	S5601-199	6.60	480.00	11,178.32	11,187.36	11,266.56	<a href="#">Agent Portal</a>	<a href="#">View</a>
<input type="checkbox"/>	Wellcare Value Script (PDP)	S4802-157	12.60	480.00	11,178.32	11,183.16	11,334.36	<a href="#">Agent Portal</a>	<a href="#">View</a>

Once the pharmacy options have been selected you can now move to the “MAPD & PDP Plans” tab. This is where you will be able to pull up a list of plans available. The default tab that is selected is the MAPD, so if you are looking for the PDP plans you will have to select the “PDP” option, if looking for just MA plans then that would be what you would want to select. Once you see the list you will be able to filter “Carrier”, “Other Filters”, select “Columns” at the top to configure the list to your liking. You can see on the sample above that you can click on the Agent Portal that will take you to their site/software, and you can view the plan details by selecting the blue “View” button at the right of the plan you would like to see. You can also compare plans and export the list in an Excel file.



Dashboard

Drug List 1

Pharmacies 1

MAPD & PDP Plans 34

Provider Search

Facility Search

Med Supp.

Ancillary

CMS Blue Button

Saved Only

Providers

Networks

Specialties

Provider Name (\*)

Providers Address

City

State

Zip (\*)

Radius

Find Providers

Showing 0 to 0 of 0 entries

Search:

EXCEL

PDF

PCP-ID	Provider Name	Degrees	Gender	Address	City	State	Zip	Network	Specialties	Group Names	Favorite
No data available in table											

PCP-ID	Provider Name	Degrees	Gender	Address	City	State	Zip	Network	Specialties	Group Names	Favorite
--------	---------------	---------	--------	---------	------	-------	-----	---------	-------------	-------------	----------

The “Provider Search” is used to lookup a client's provider and see what networks they are contracted with for the various MA and MAPD plans. It is always best to make sure your clients Dr. are in network. Any fields with (\*) need to be completed.

Dashboard

Drug List 1

Pharmacies 1

MAPD & PDP Plans 34

Provider Search

Facility Search

Med Supp

Ancillary

CMS Blue Button

Saved Only

Facilities

Networks

Specialties

Facility Name (\*)

Facility Address

City

State

Zip (\*)

Radius

Find Facilities

Enter a location

67401

15 Miles

Showing 0 to 0 of 0 entries

Search: 


EXCEL

PDF

Facility	Address	City	State	Zip	Network	Specialties	Distance	Action
No data available in table								

Facility	Address	City	State	Zip	Network	Specialties	Distance	Action
----------	---------	------	-------	-----	---------	-------------	----------	--------

The “Facility Search” is used to lookup a client’s provider facilities and see what networks they are contracted with for the various MA and MAPD plans. Again, it is always best to make sure your clients’ facilities are in network. Any fields with (\*) need to be completed.



Dashboard

Medicare Advantage / PDP

Dental

Medicare Supplement

Final Expense Life


Hospital Indemnity

Contact Support

Dashboard


Welcome back, Producers XL Agents!

Tools




Medicare Advantage / PDP

Run Quote




Dental

Run Quote




Medicare Supplement

Run Quote



Final Expense Life

Run Quote



Hospital Indemnity

Run Quote

DataMart

Select a file below to download.

Rate Change Report

Rate Change Report 2022-04-01 Total

Rate Change Report 2022-03-01 Total

Rate Change Report 2022-02-01 Total

The tab “Med Supp” is where you can get access to our Medicare supplement quote system. You will also see some other products that can be quotes.

List 126514

CMS Blue Button

Customer drug list can be imported from CMS into Search And Save using the CMS Blue Button. Click the button below to send an authorization request to your customer to authorize use of their drug list with the Search And Save System.

Blue Button 2.0

Drug List

Search: PDF

ReferenceNDC Name

No data available in table

The “CSM Blue Button” tab can be used to download your clients information direct from CMS. When you click on the Blue Button 2.0 you will see a popup “Authentication Request” that has to be completed.

Authentication Request

Do not send to yourself.

Please enter the name and email address of the customer you would like to authenticate using Blue Button Technology for this specific list.

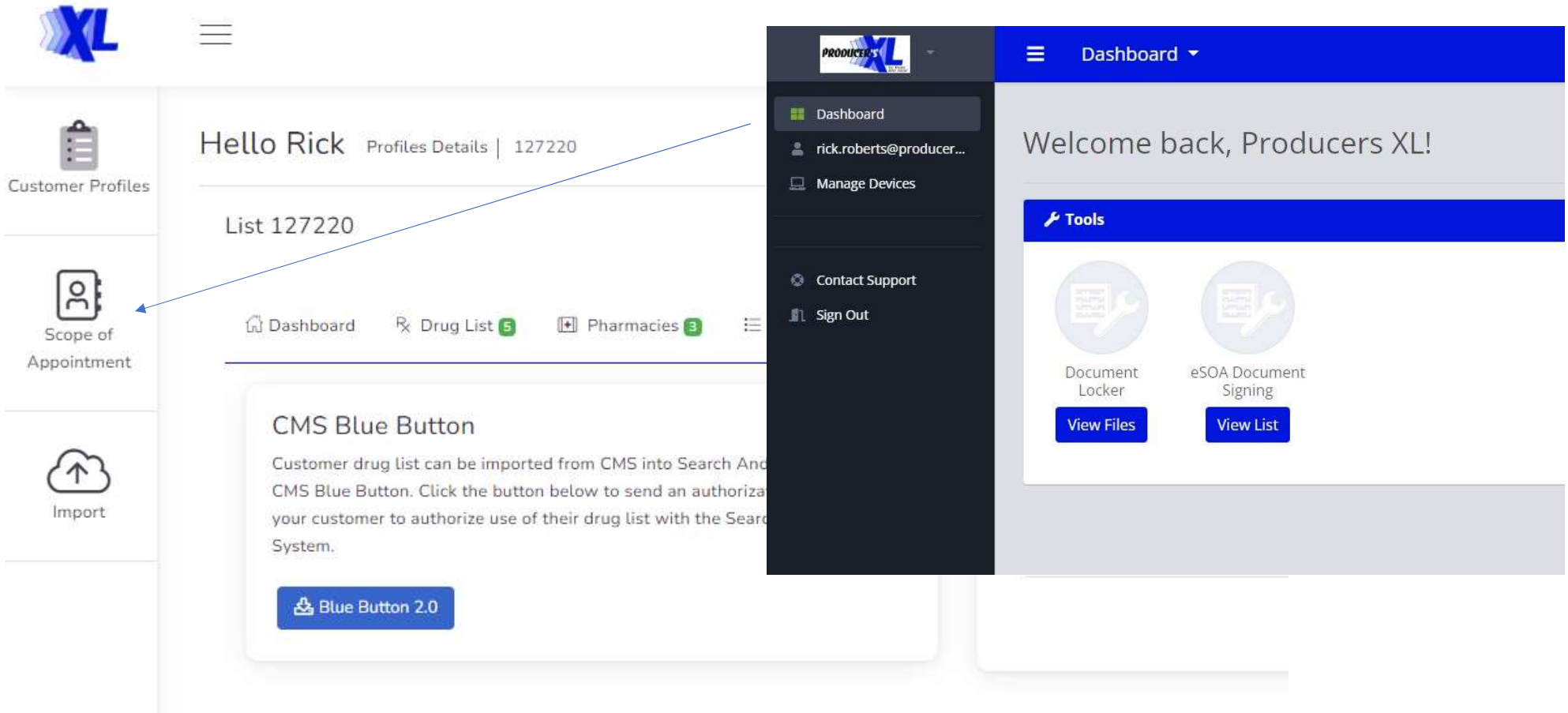
Customer Name

Customer Email Address

Send Request

Cancel





By clicking on the “Scope of Appointment” on the left-hand menu, you will be taken to our eSOA platform where you can send and complete electronic scope of appointments for your PDP and MAPD appointments. Please reach out to us for training on this platform.



Customer Profiles



Scope of Appointment



Import



List Identifier Request

Hello Rick [Import Profiles](#)

Excel



Upload an Excel file to import into Search And Save.

[Get Started](#)

CSV



Upload A CSV file to import into Search And Save.

[Get Started](#)

The “Import” link will bring up this page with the ability for you to upload your client information from an Excel file to CSV file. There will be an option to export your list as well.



FOR THOSE WHO EXCEL

If you have any questions or would like some training on any of these platforms, please reach out to me.



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