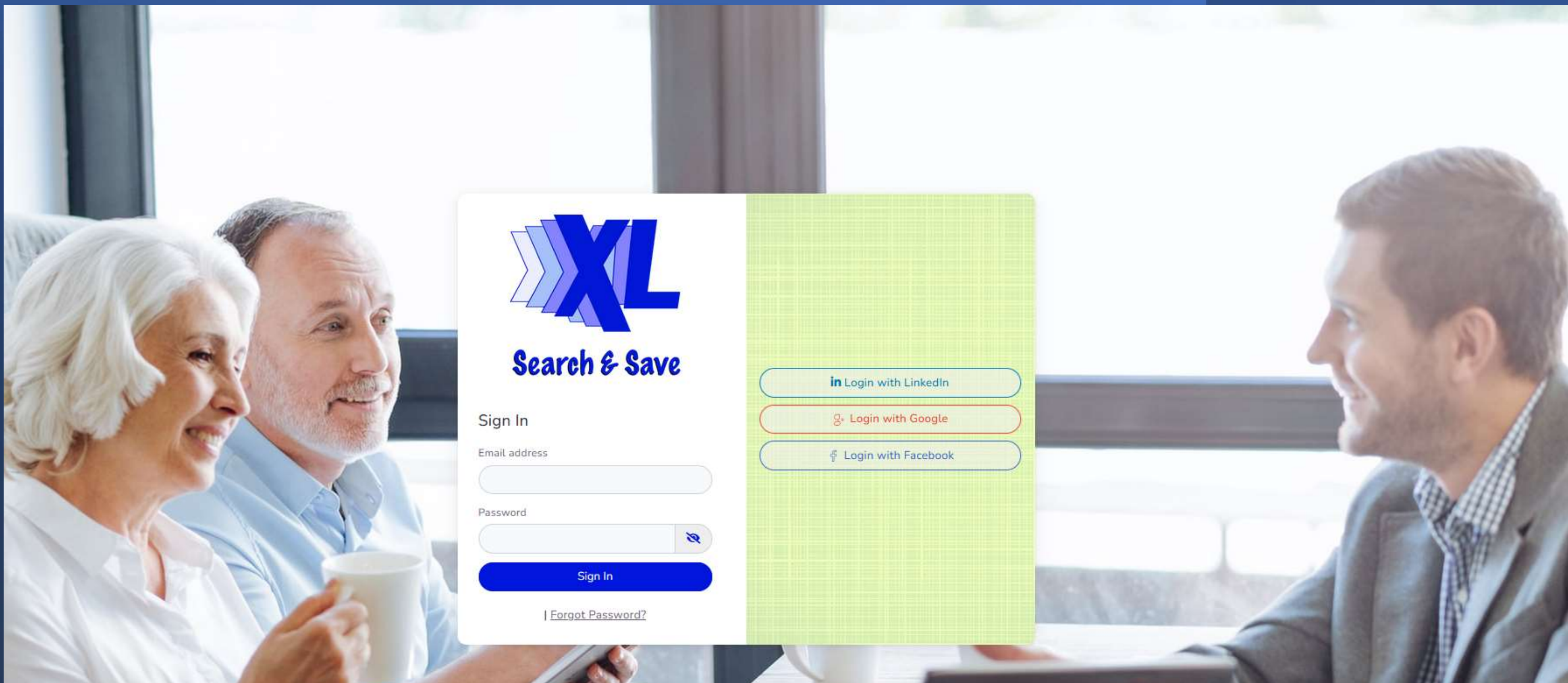
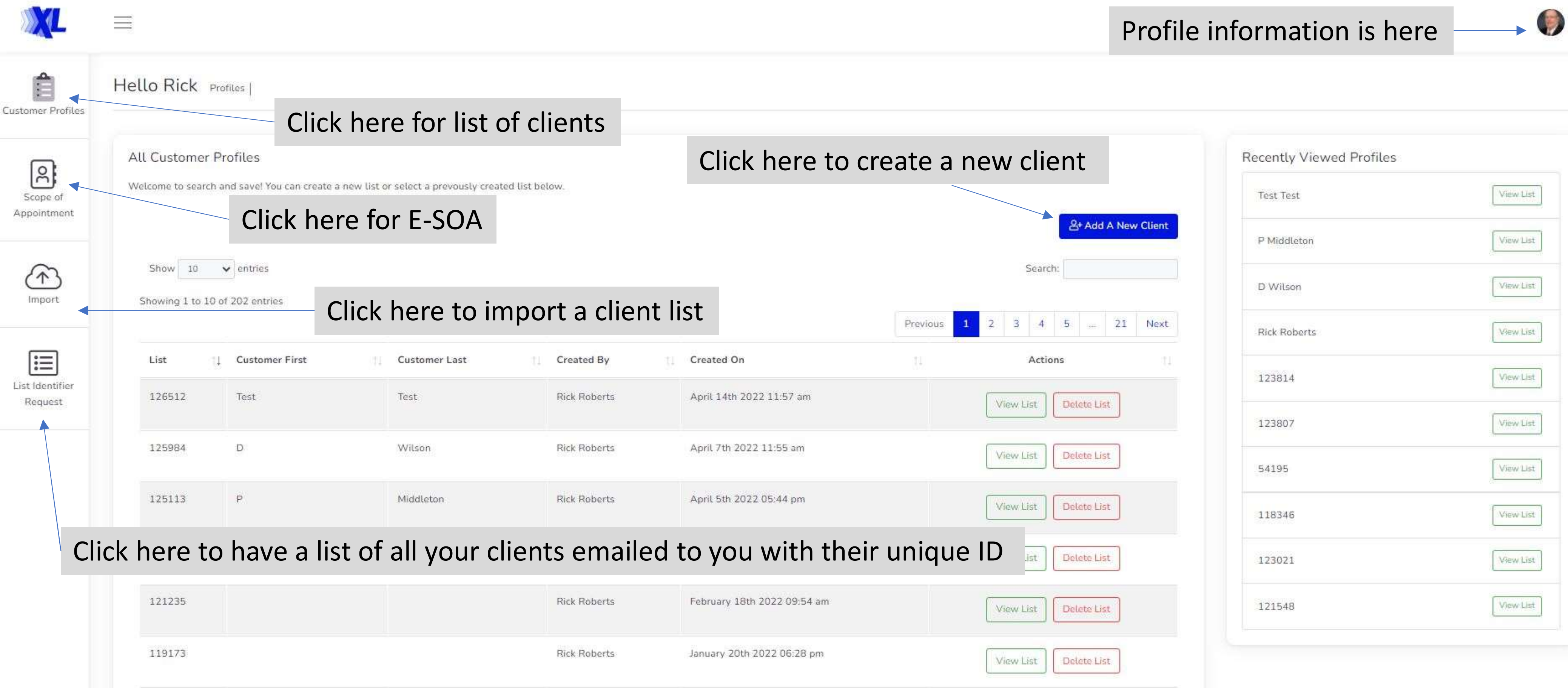
New & Improved

Medicare Search & Save

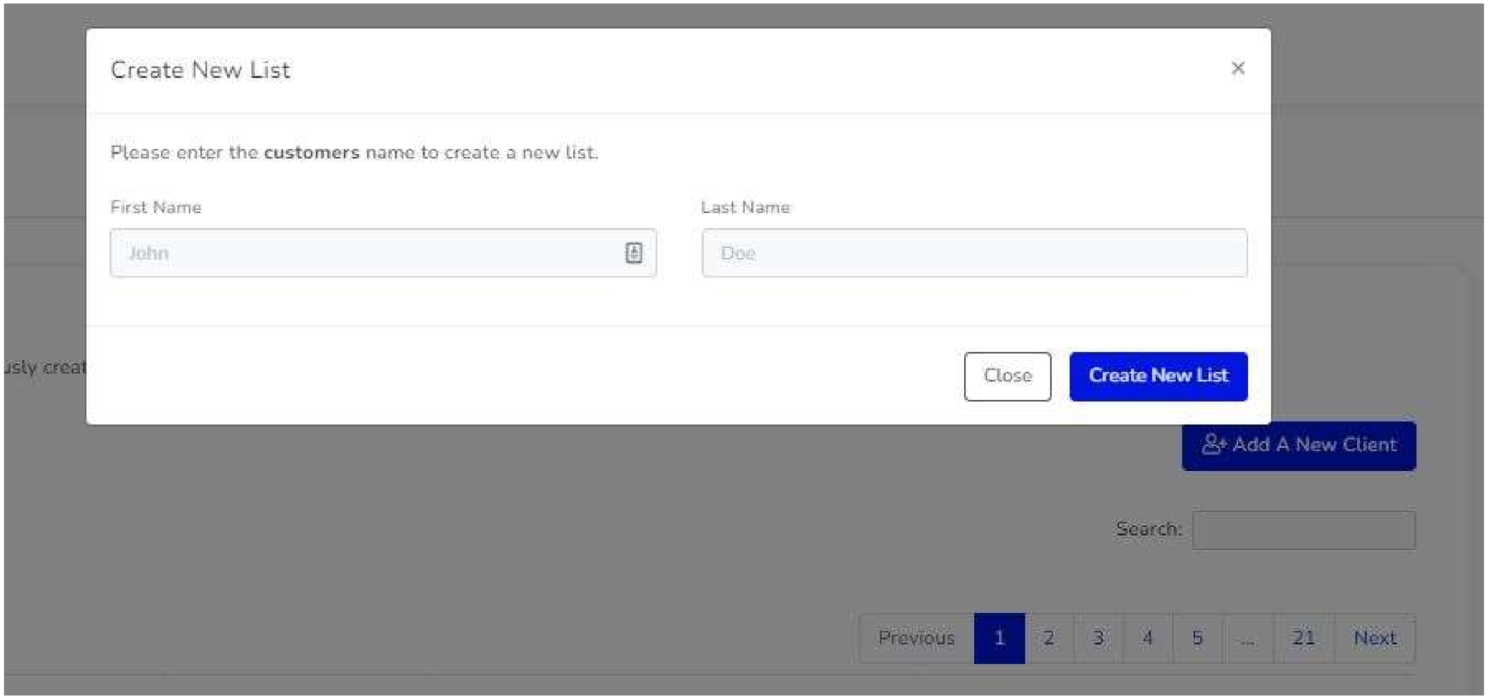


www.pxl.searchandsave.org

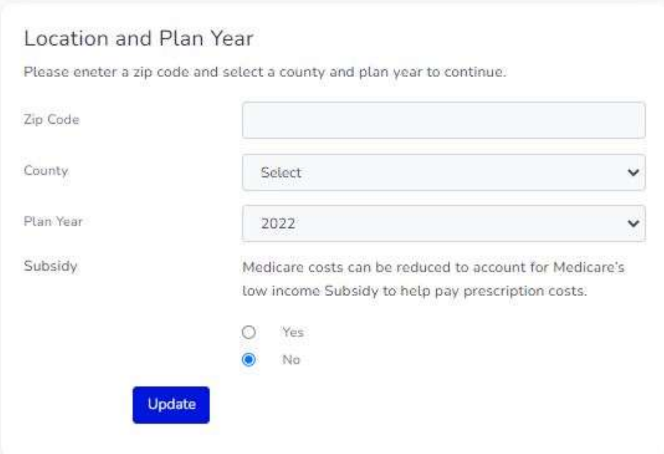
If you do not have a login, please reach out to us on how you can qualify. 800-541-6705

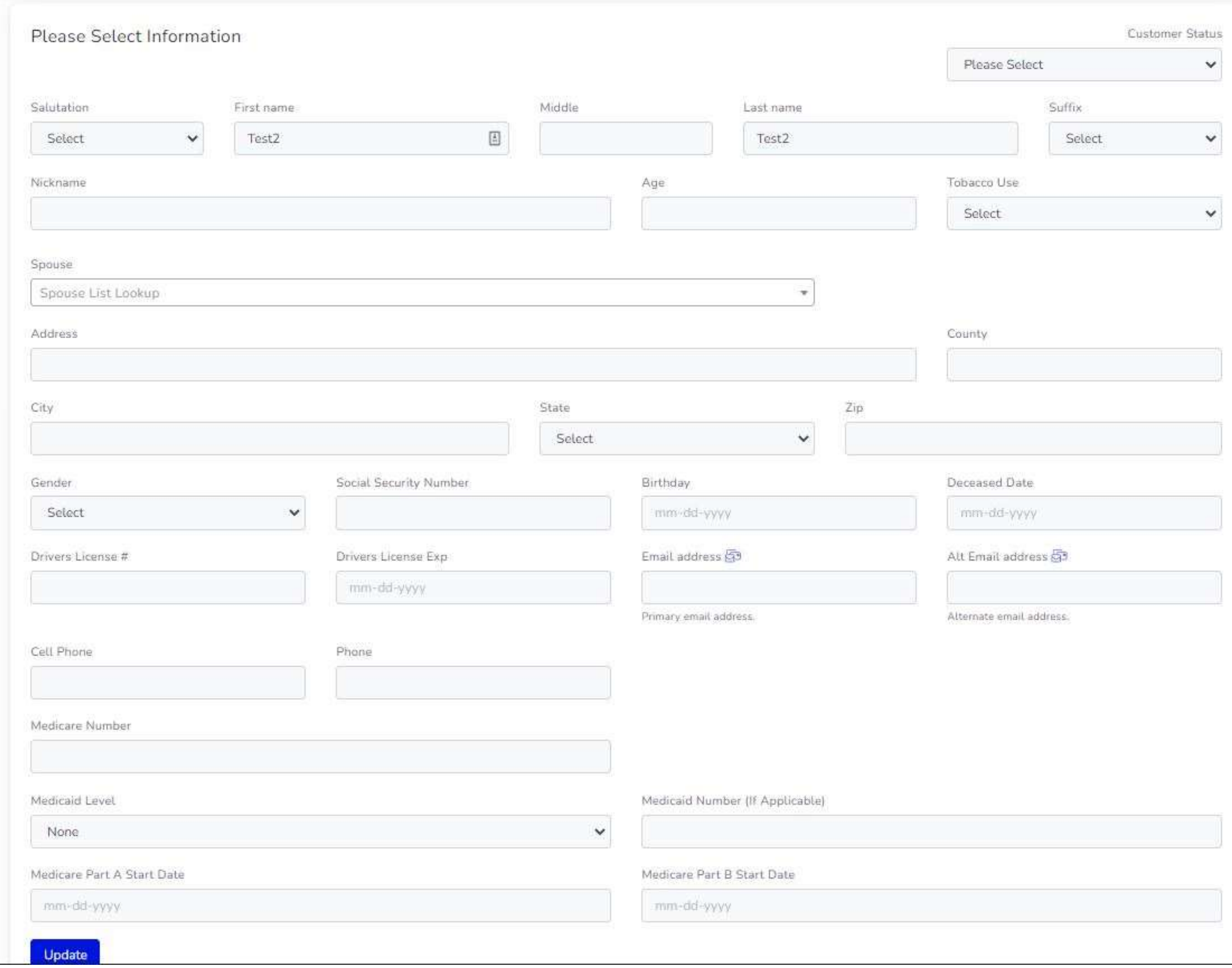


The is the main page that comes up after logging into the site. The "Profile" page is where you can update your personal information and change your password and set up the 2-Step authentication. To create a new client profile, you will want to click on the blue button "Add a New Client". Also, on the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

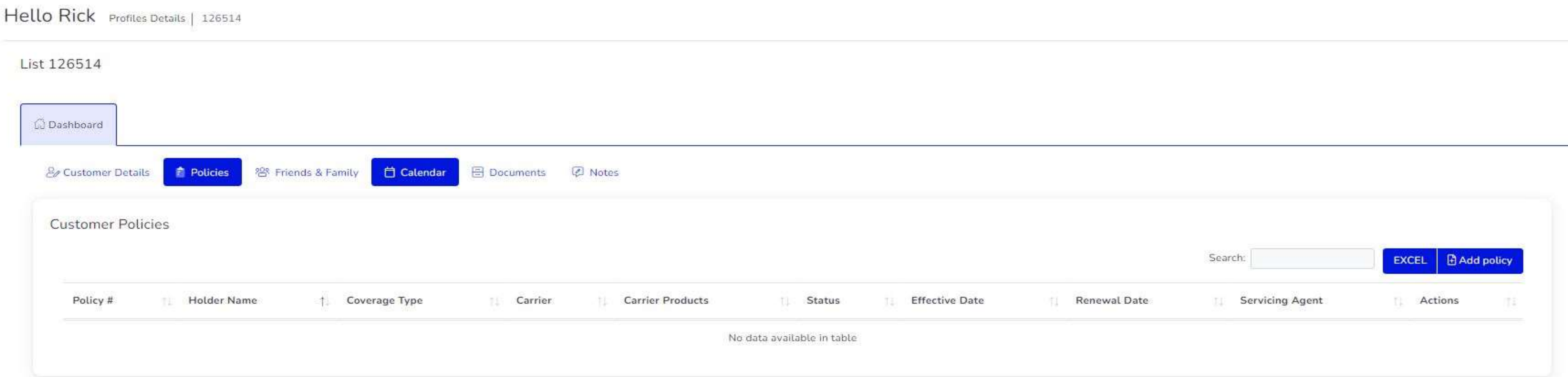


Once you click on the “Create New Client” button you will see this window pop up and you will input the client first name and last name and hit the blue button “Create New List”





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.



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

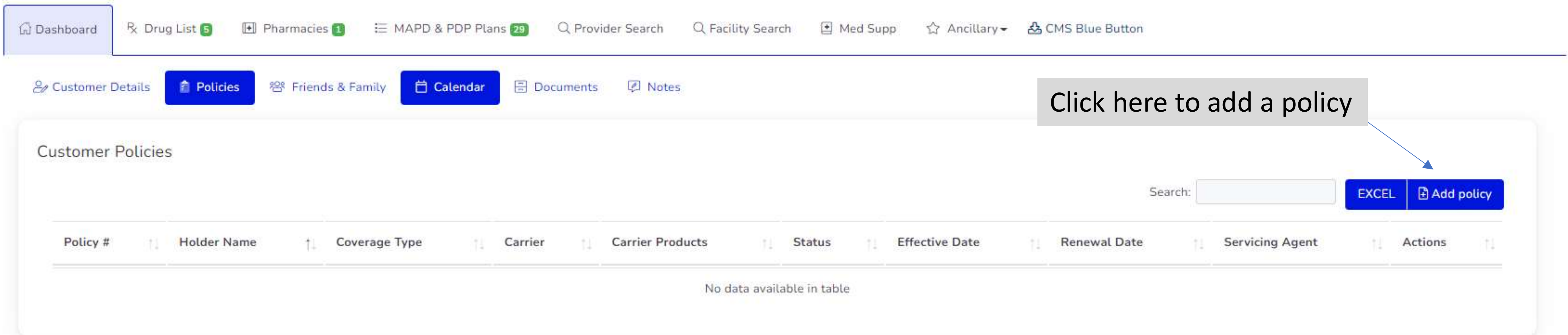
Policies – This is where you can add policy information

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

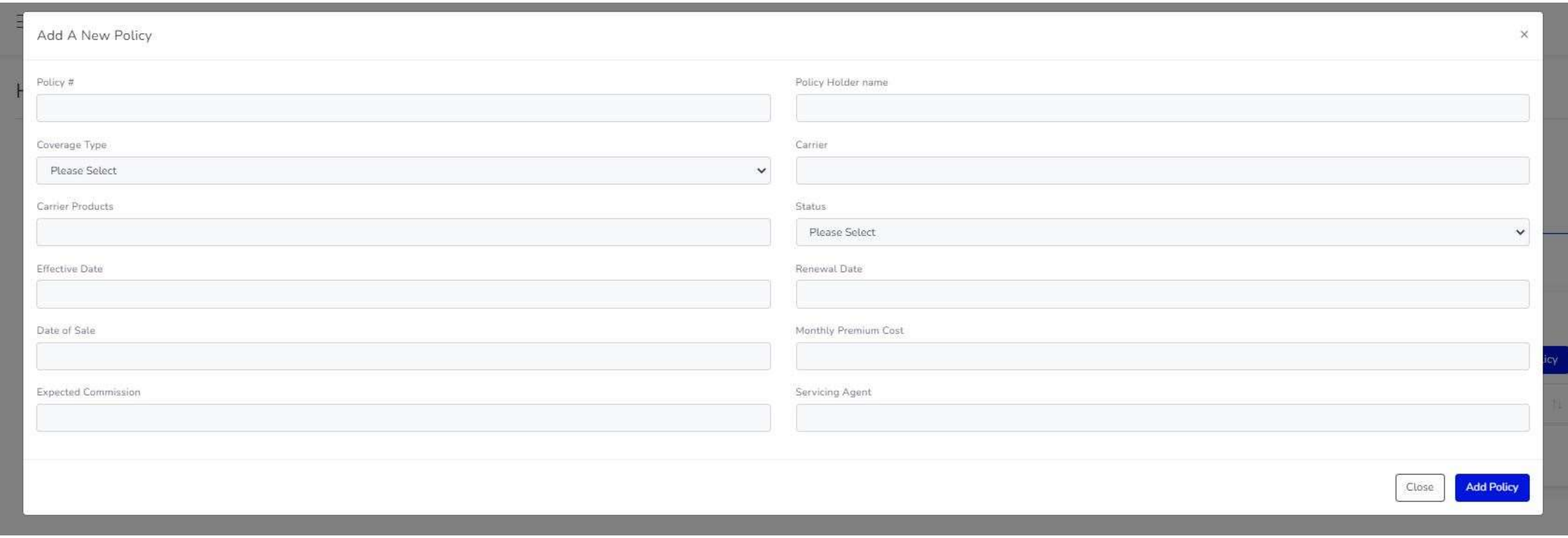
Calendar – You can use this for scheduled appointments, birthdays, or any other important dates you would like to keep track of.

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.

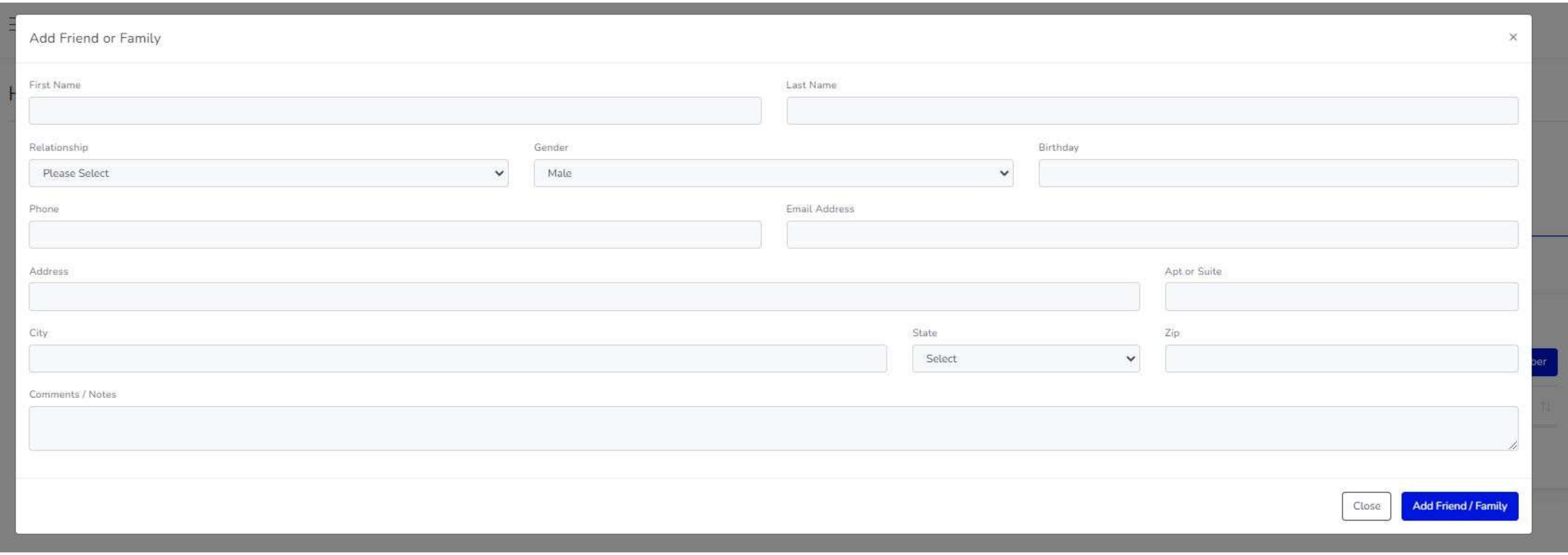


From this screen you will be able to view the list of policies that you have added and edit or download that data in Excel if needed.

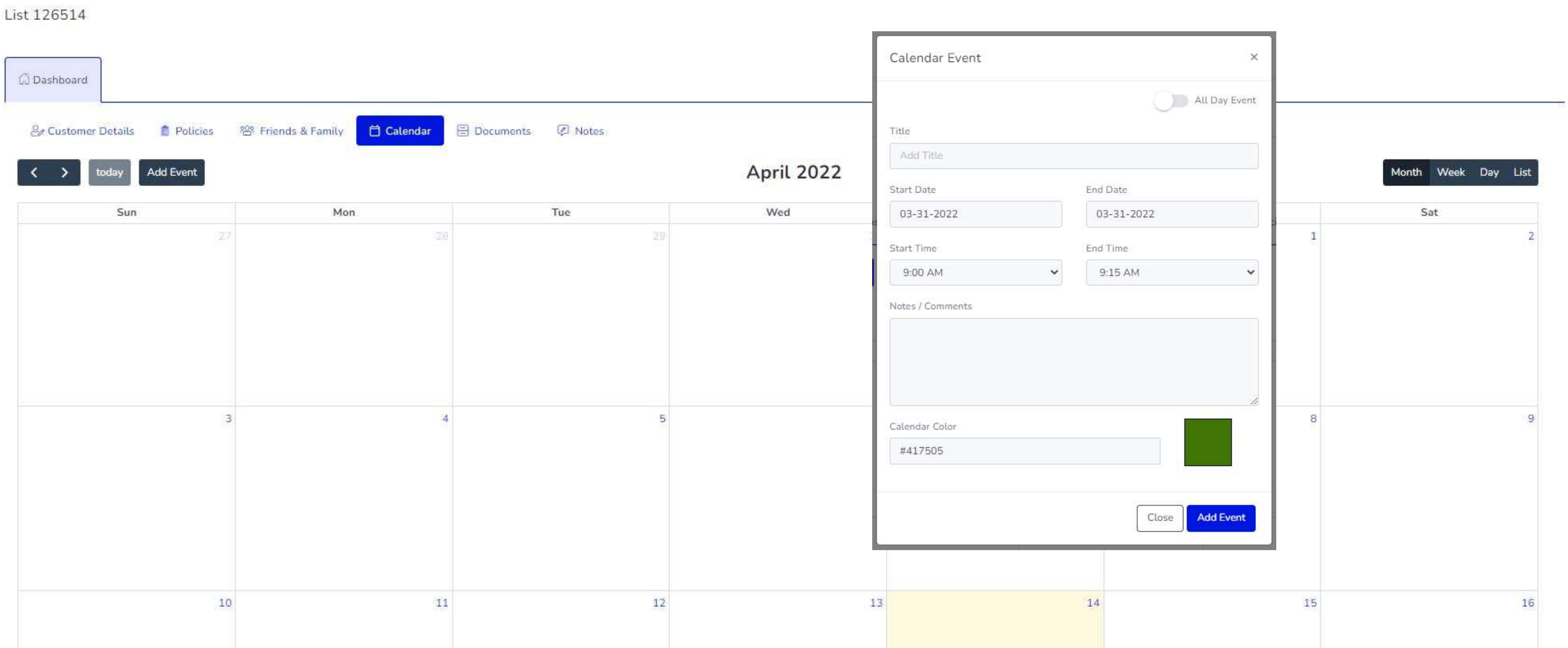


This is the data input page for any new policy. Once you have completed all the section with the information that you would like to save, you will click the "Add Policy" blue button to save it.

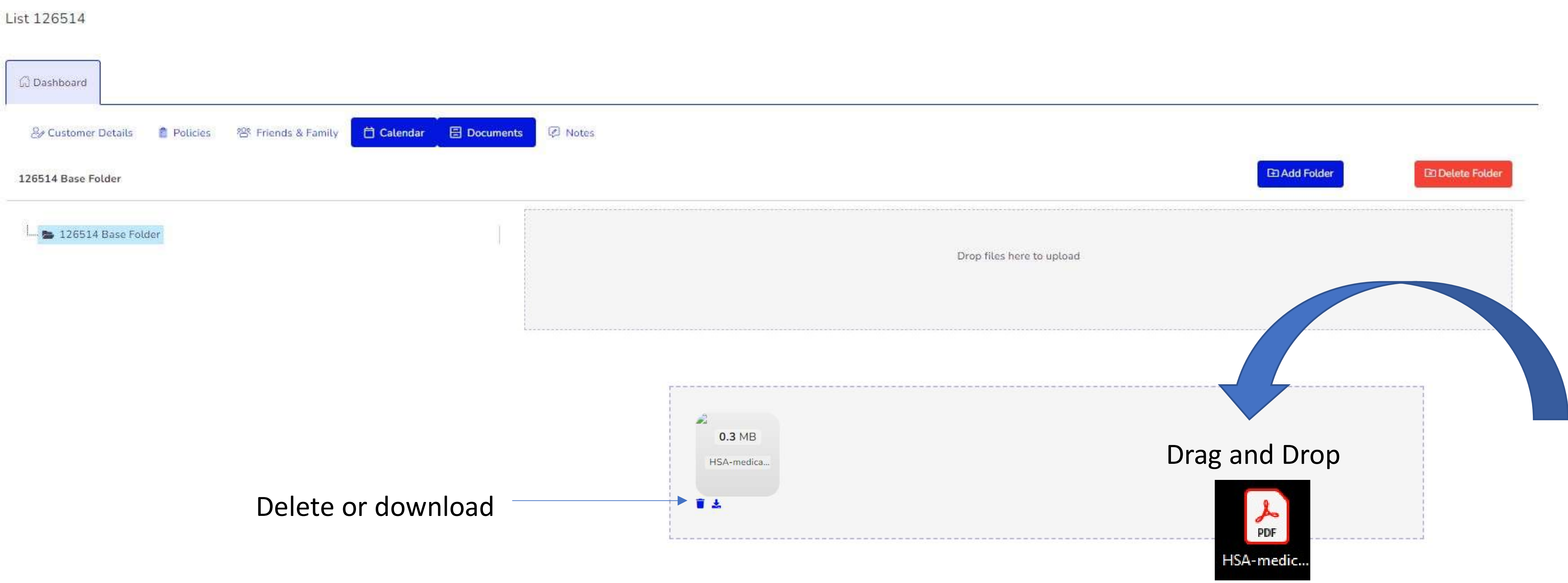
From this screen you will be able to view the list of friends and family that you have added and edit or download that data if needed. This will be used as important contacts and/or referrals



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.



This a full functioning calendar that you can used 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.

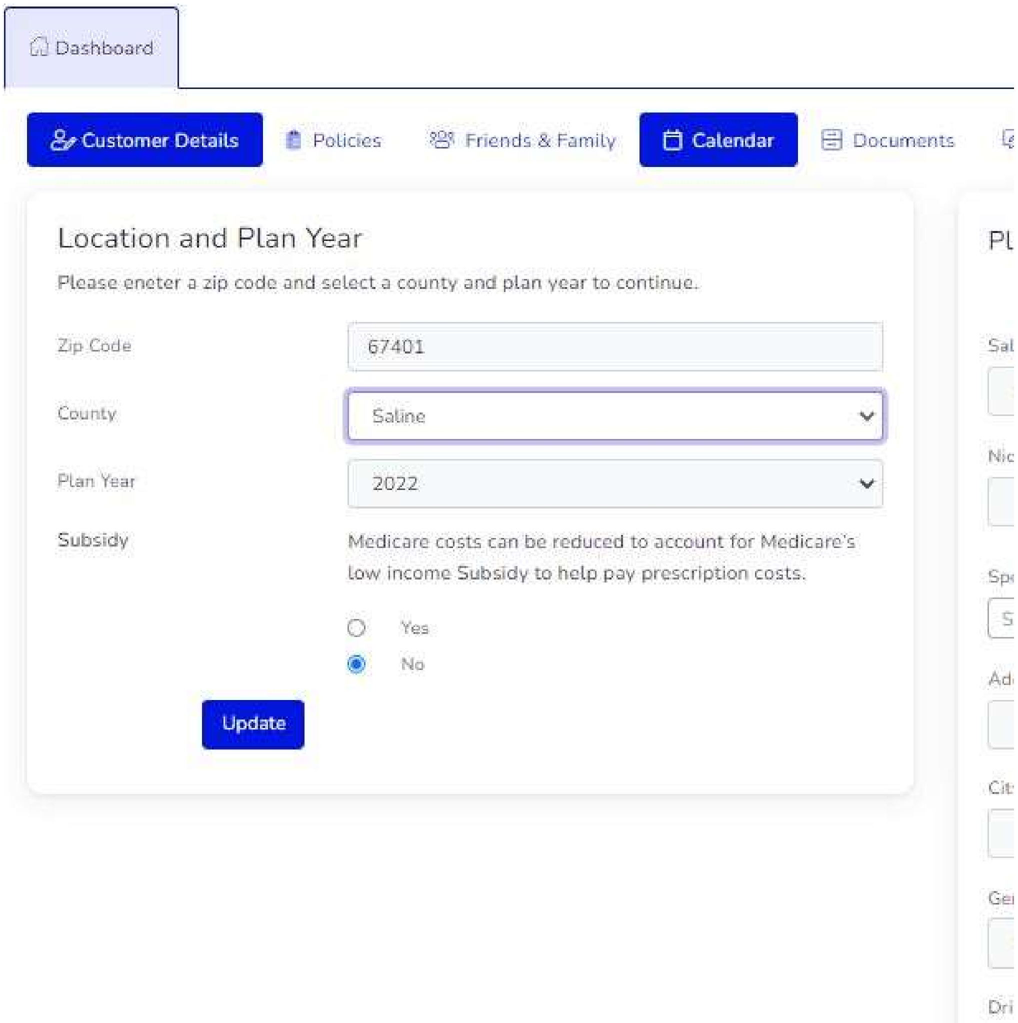


The next tab over from the calendar is the “Documents” tab. Here you will be able to add/delete folders and drag and drop documents into them.

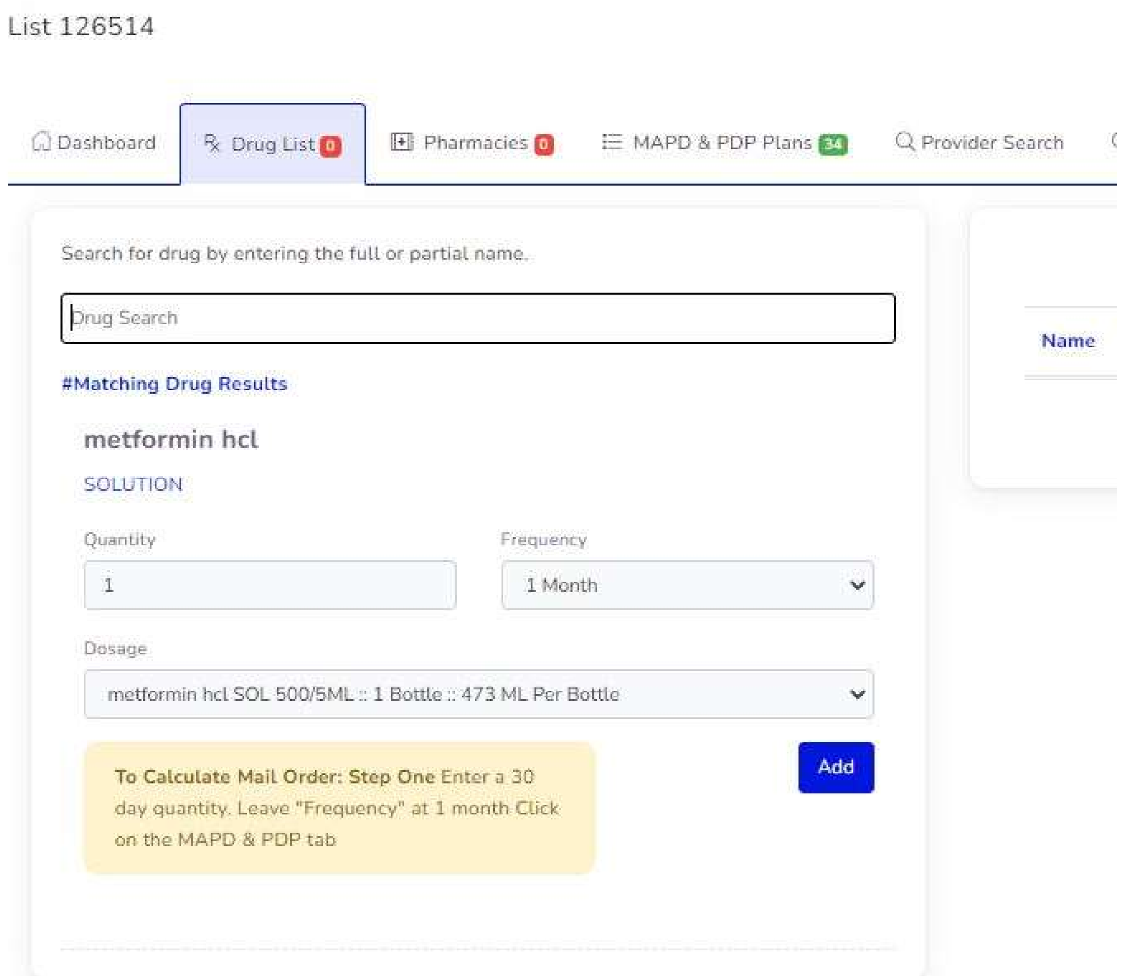
Click here to add a note

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



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.



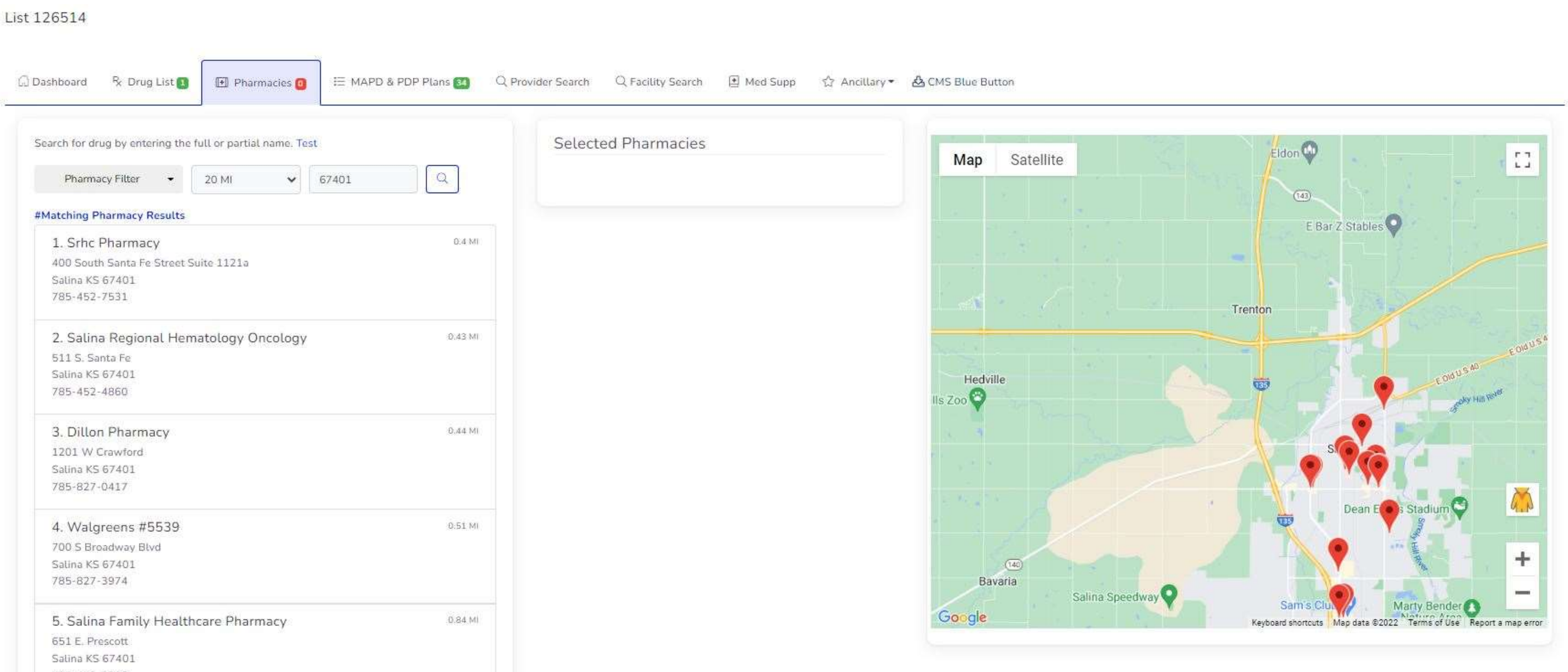
After you input the zip code, county, and plan year and hit the update button, you will see a series of tabs that will appear and the first one you will want to click on is the “Rx Drug List”. This is where you will enter their prescription medications. You will need to know the medication, dosage and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

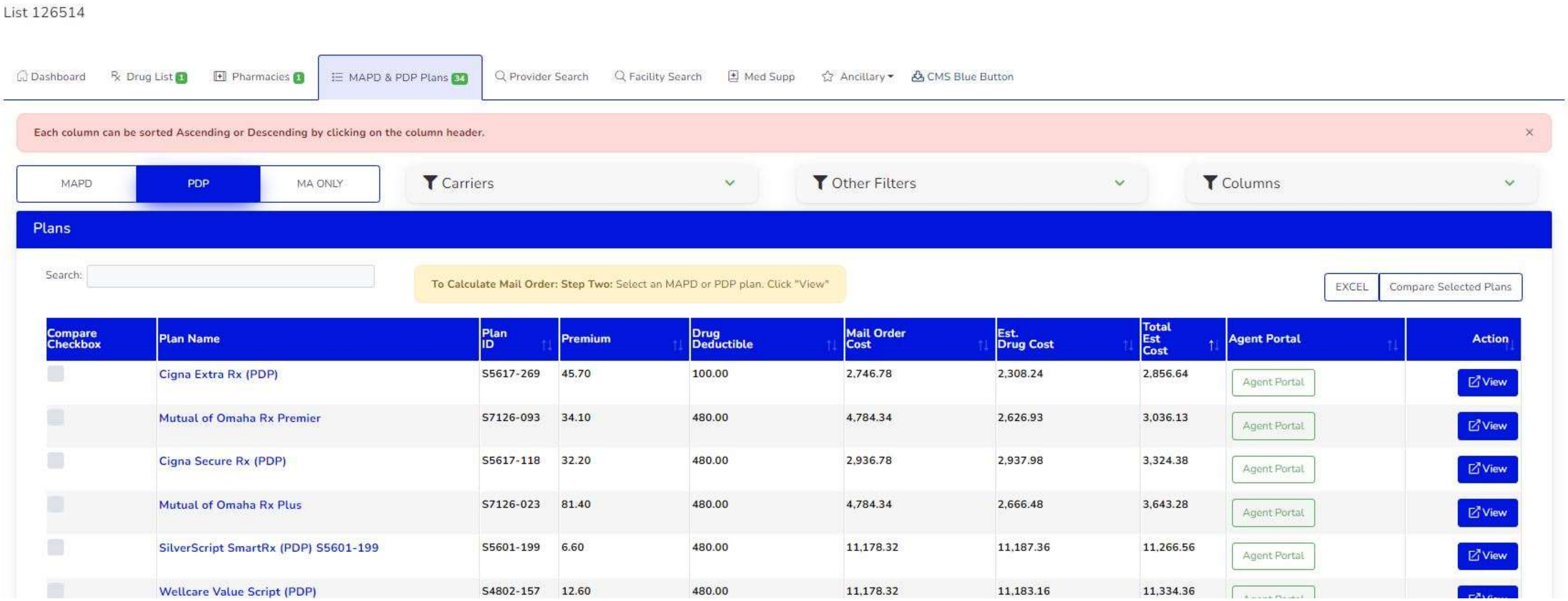
PDF

Name	Dosage	Quantity	Frequency	Actions
metformin hcl	1 Bottle :: 473 ML Per Bottle	1	One Month	≡

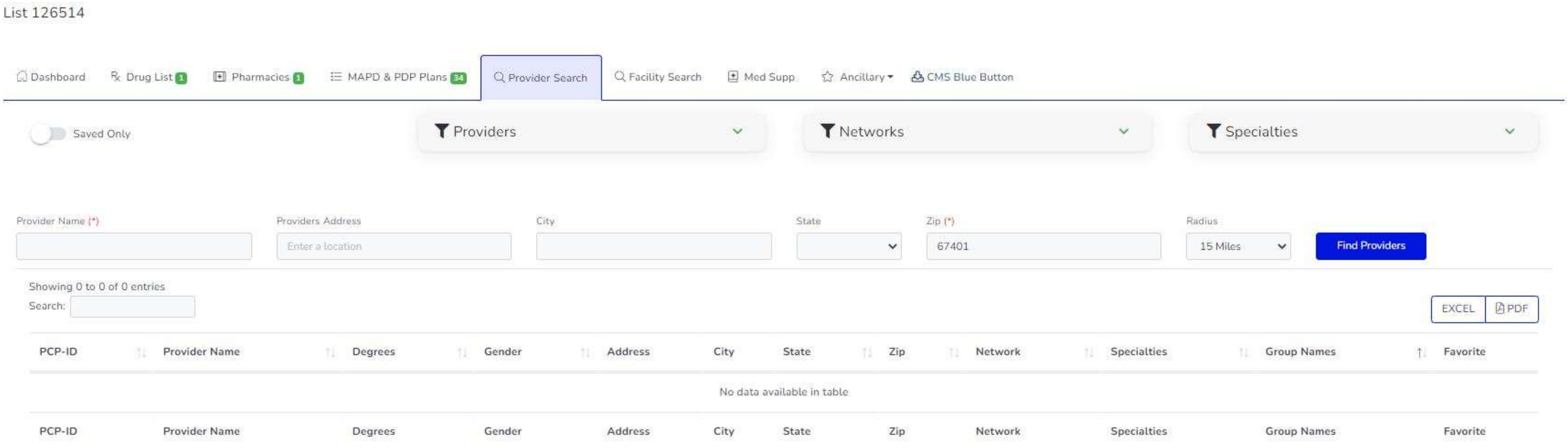
This is an example what it looks like when the drug is added to the list. If will show you all the information that you inputted. The ≡ can be used to edit and delete the medication on the list. At the top you will see the PDF icon that can be clicked on and save the drug list as a PDF file.



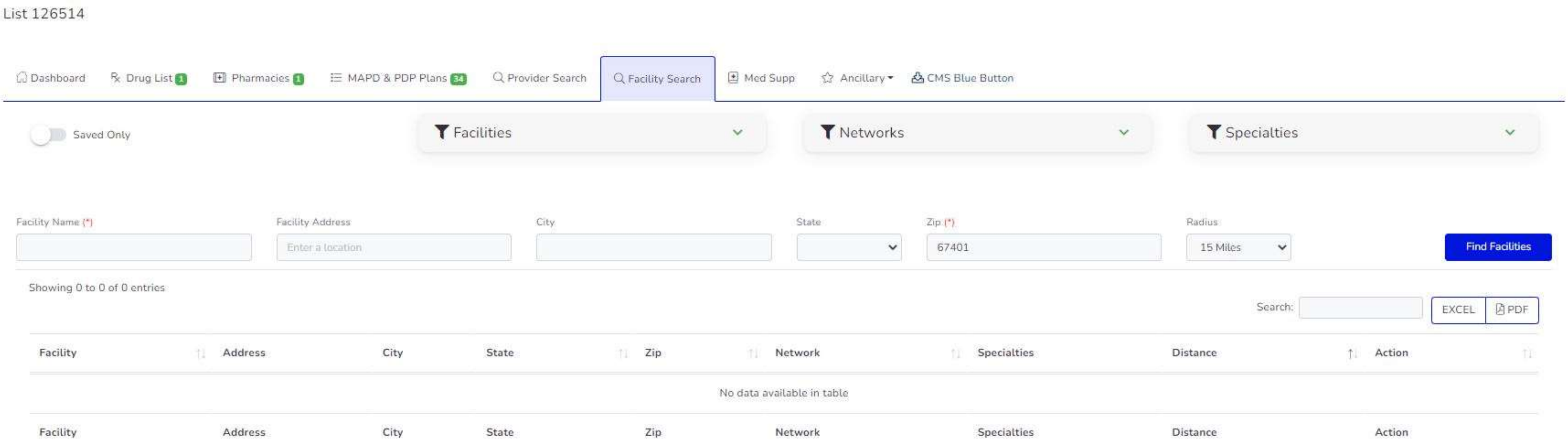
After completing the medications, then next thing to click on is the “Pharmacies” tab. This is where you can select up to three pharmacies within a zip code. If you need a wider area to look at you can adjust that by clicking on the millage dropdown or adjust the zip code. A map will be off to the right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



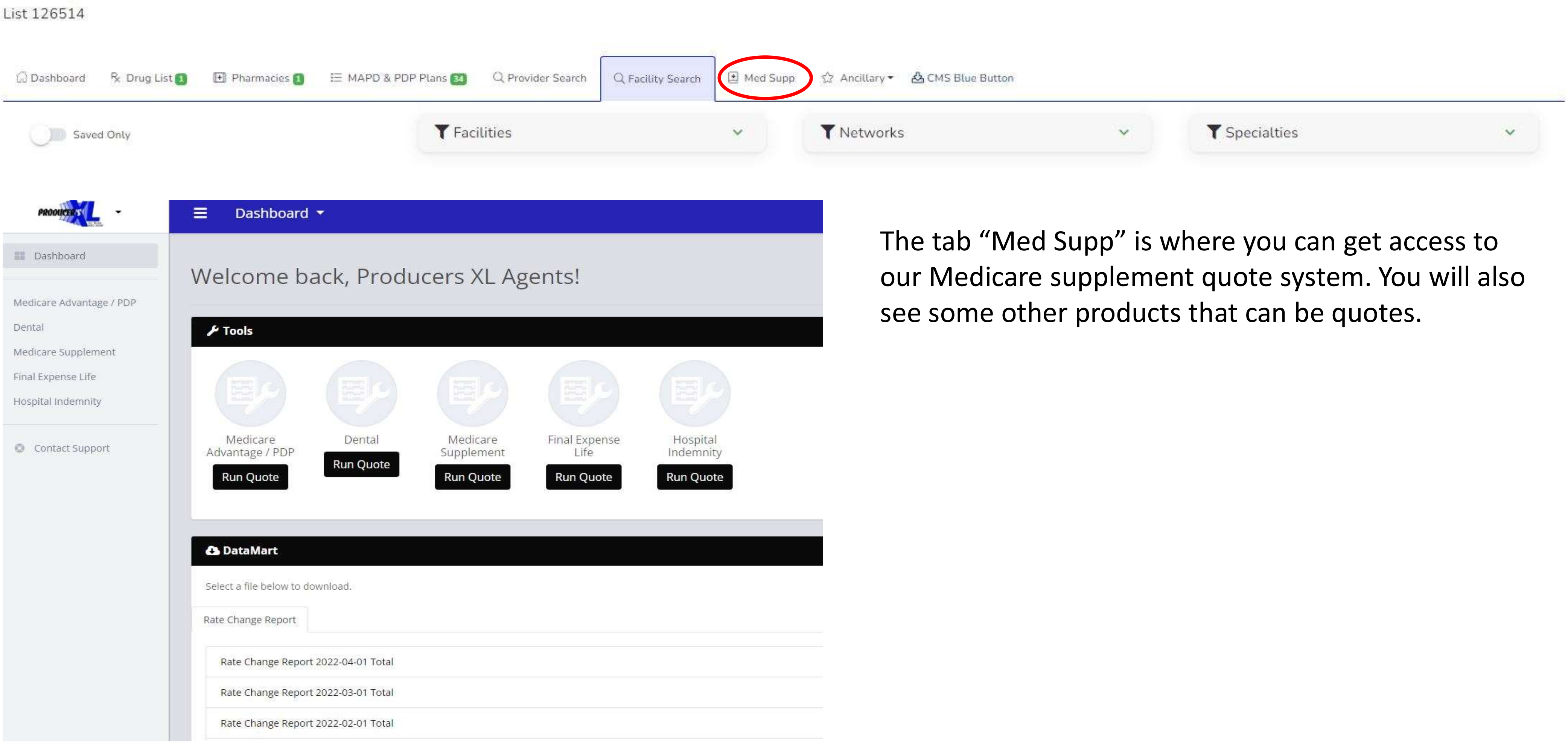
Once the pharmacy options have been selected you can now move to the “MAPD & PDP Plans” tab. This is where you will be able to pull up a list of plans available. The default tab that is selected is the MAPD, so if you are looking for the PDP plans you will have to select the “PDP” option, if looking 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.



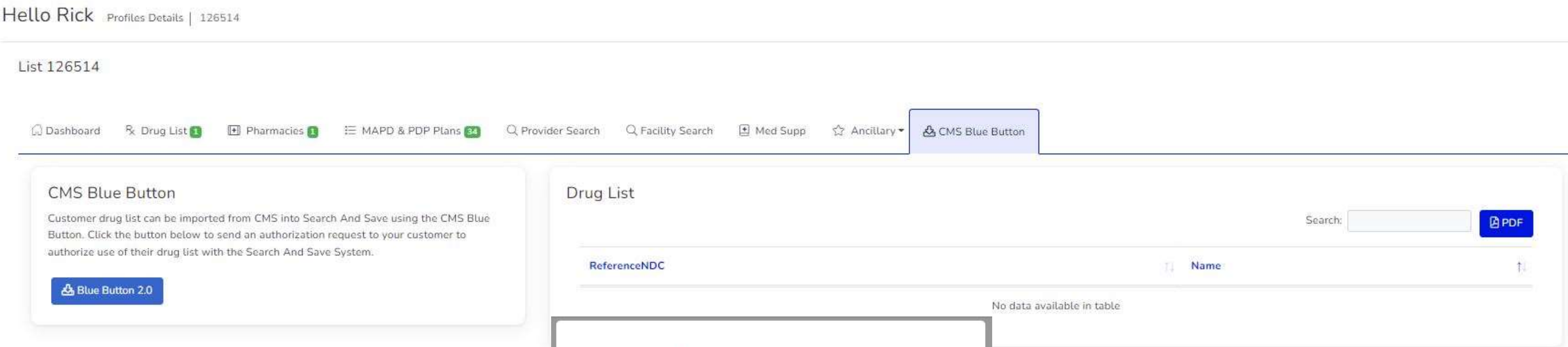
The "Provider Search" is used to lookup a client's provider and see what networks they are contracted with for the various MA and MAPD plans. It is always best to make sure your clients Dr. are in network. Any fields with (*) need to be completed.



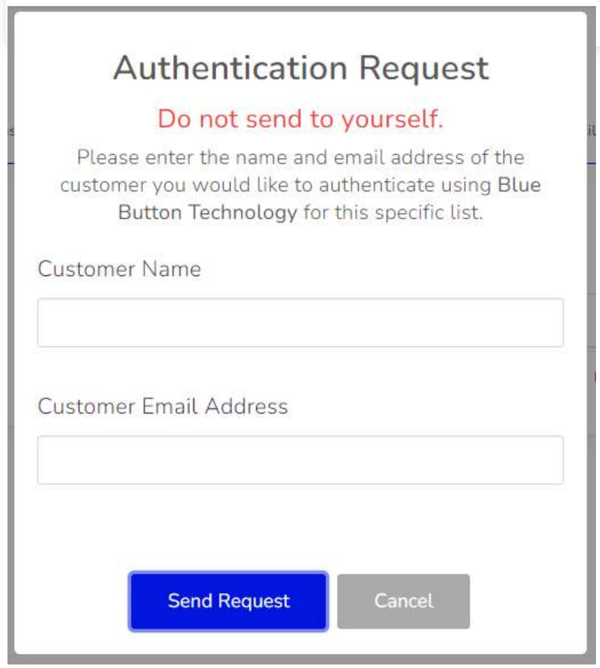
The “Facility Search” is used to lookup a client’s provider facilities and see what networks they are contracted with for the various MA and MAPD plans. Again, it is always best to make sure your clients’ facilities are in network. Any fields with (*) need to be completed.

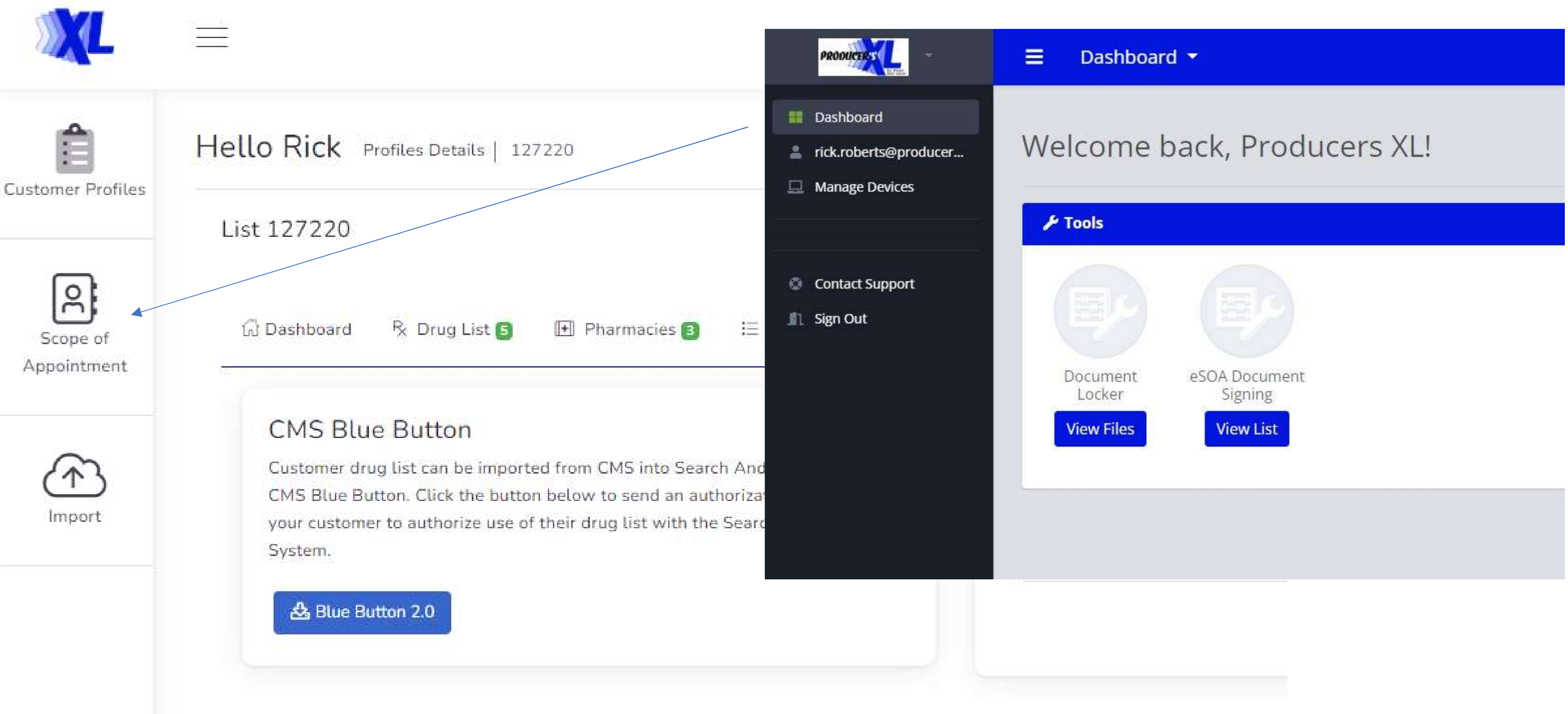


The tab “Med Supp” is where you can get access to our Medicare supplement quote system. You will also see some other products that can be quotes.

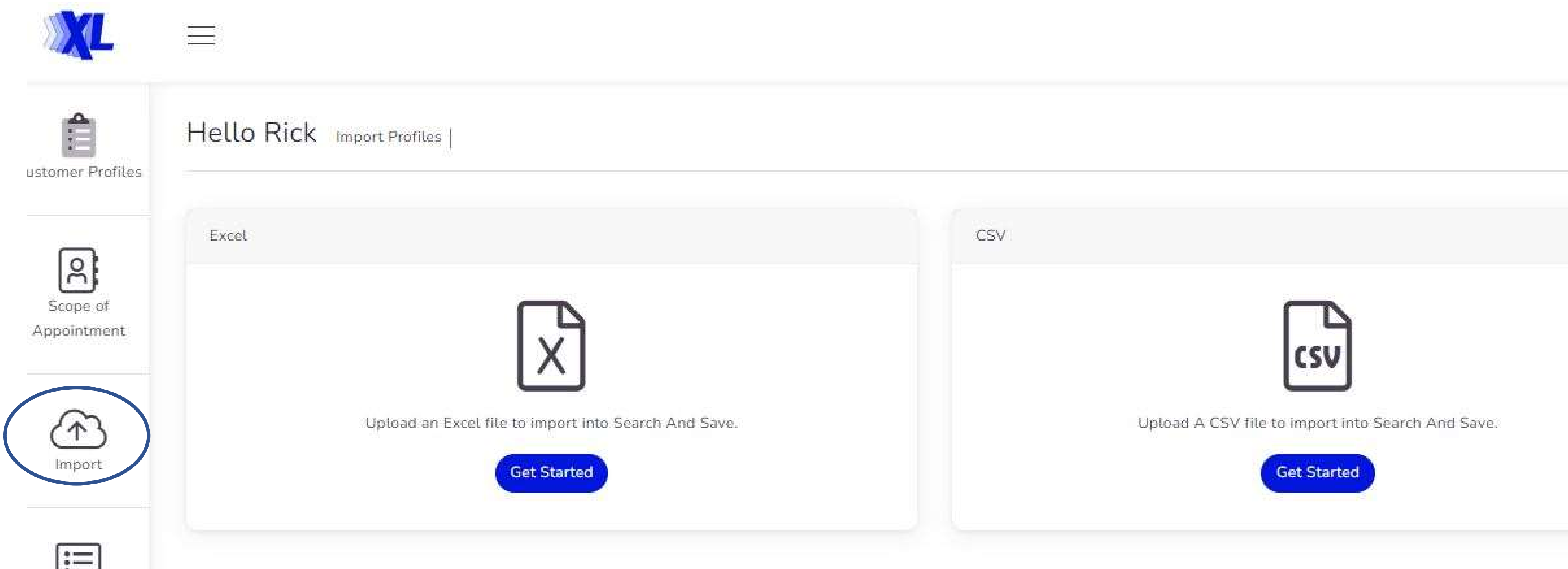


The “CSM Blue Button” tab can be used to download your clients information direct from CMS. When you click on the Blue Button 2.0 you will see a popup “Authentication Request” that has to be completed.





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.



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. Their will be an option to for exporting your list as well.

PRODUCER'S XL 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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800-541-6705