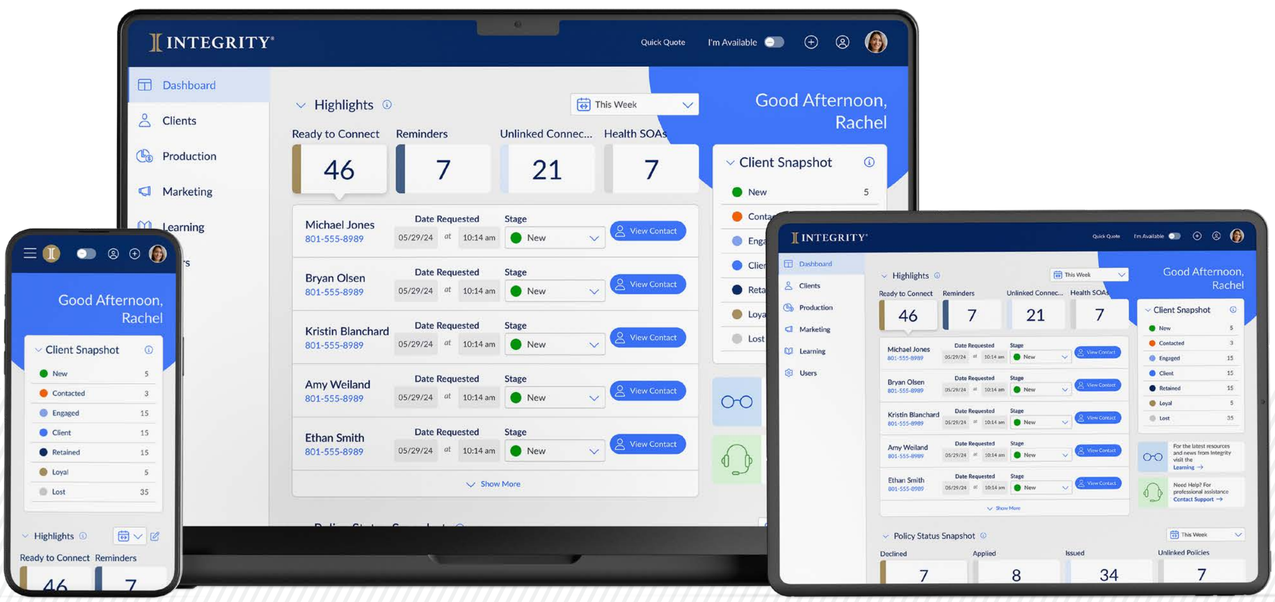
INTEGRITY®
CONNECT



Agent Getting Started Guide

Last updated 10.1.25

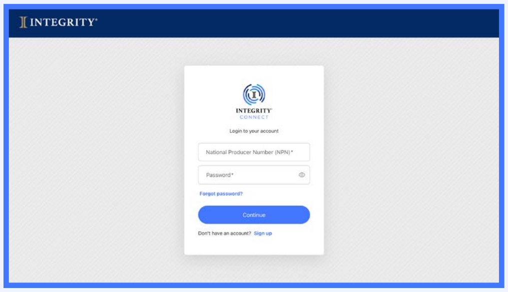
Table of Contents

Getting Started

Follow the simple steps below to get your IntegrityCONNECT™ account ready so you can serve more clients.

Logging In

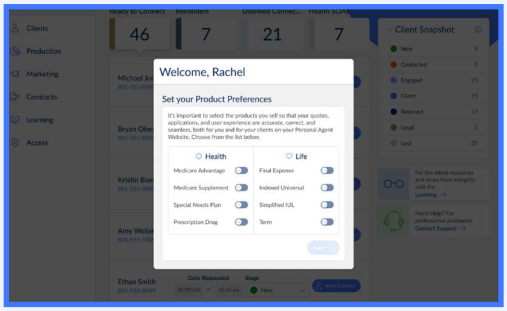
Go to Integrity.com and click “Login” to begin.



Product Preferences

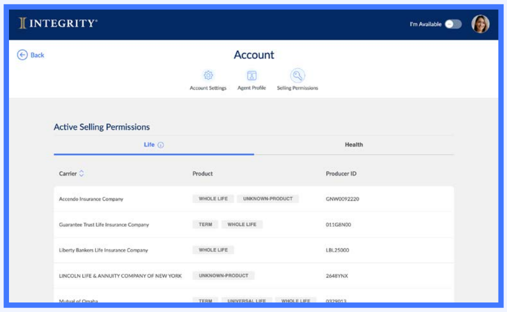
A welcome message will appear that prompts you to select which products you want to have available in the platform. You can do it here, or follow the steps below.

- In your **Profile Menu**, click **Account** and then **Agent Profile**.
- Click the edit button under **Product Preferences** and select which products are available to you in the platform. This will reflect on your PlanEnroll Agent-personalized Website and in your Client Connect marketing messages.



Selling Permissions

- In your **Profile Menu** click **Account** then **Selling Permissions**.
- **Active Selling Permissions** shows the list of products already added for you, based on your carrier appointments.
- If any products or carriers are missing, click **Add New +** in **Manual-Attested Permissions** to add them.
  - Manual Attestations will expire if not verified by the carrier.



Getting Support

Help is just a click away with IntegrityCONNECT.

- Click the **Live Chat** button at the bottom-right corner of your dashboard
- For non-urgent inquiries or feedback, access the Help Center phone line or support email address by clicking **Contact Support**.
- Or click **Learning** to access a library of help topics.

IntegrityCONNECT was built to help you be more successful!

Client Relationship Manager

IntegrityCONNECT has a built-in CRM that helps you organize everything you need to build great client relationships, so you'll know every client better.

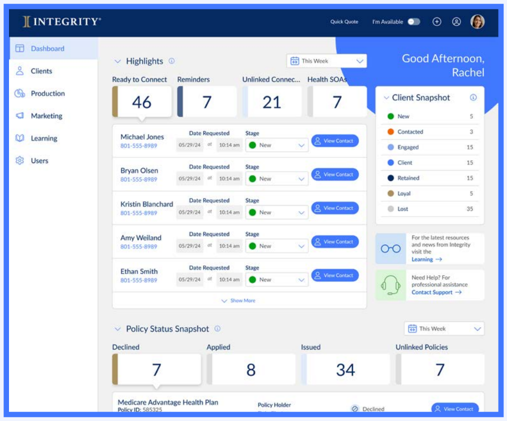
The CRM lets you:

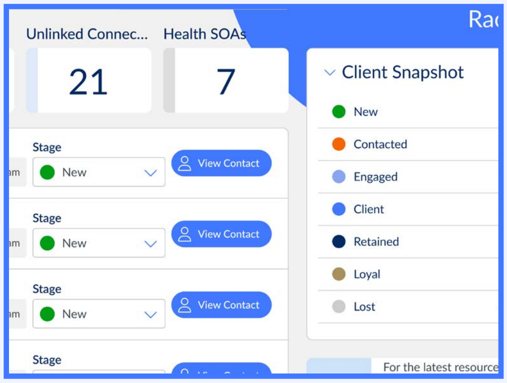
- Track client policy status
- See recent client activity, including calls
- Set reminders and follow-up tasks
- Message clients directly

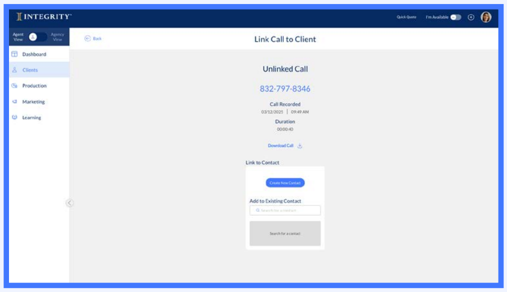
Organizing Unlinked Connections:

- On the **Dashboard** click **Unlinked Connections**.
- Click **Link to Contact** on one of the Unlinked Calls.
- You'll see call information and an option to **Download Call**.
- Next, link to a contact. You can either **Create a New Contact** to link the call to or **Add to Existing Contact** by searching for the contact and choosing from suggested contact matches.

More sales, less stress and happier clients with IntegrityCONNECT.







Dashboard, Tasks & Reminders

IntegrityCONNECT has a dashboard that puts everything you need at your fingertips.

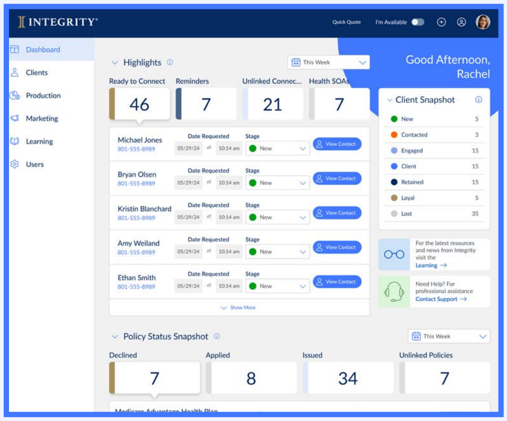
- Quickly access Clients, Marketing, Learning and more
- **Client Snapshot** and **Task List** for insights at-a-glance
- **Policy Snapshot** provides policy status at your fingertips
- **Recent Activity** to stay on top of the current details
- Plus, **Reminders** and **Custom Notes** to help you serve your clients and never miss a commitment!

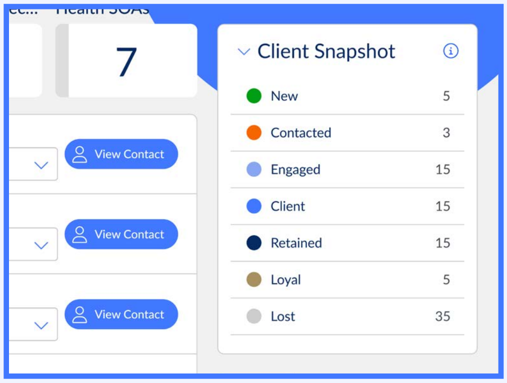
Access the CRM and IntegrityCONNECT's other powerful features in the Integrity mobile app! Download on the Apple and Google stores so you can work anywhere.

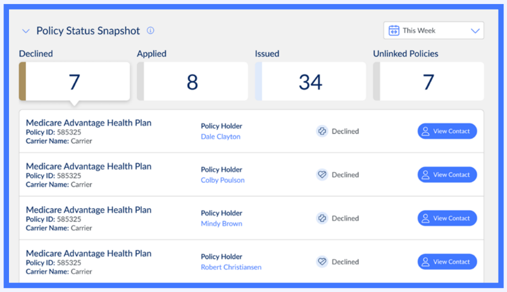
Download on the App Store

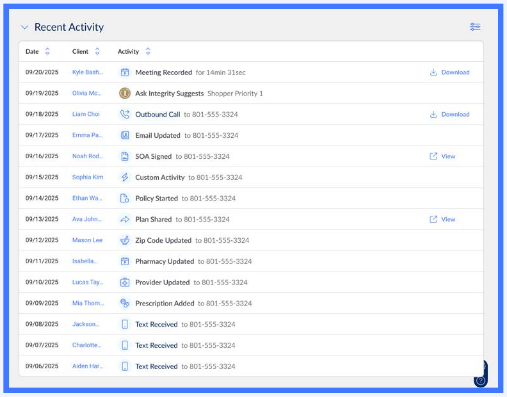
GET IT ON Google Play

IntegrityCONNECT is the all-in-one platform that has everything you need to serve your clients.









Built-in Quote & eApp

Sign in once for quoting and application submissions. Client information is filled in automatically!

Quote & eApp:

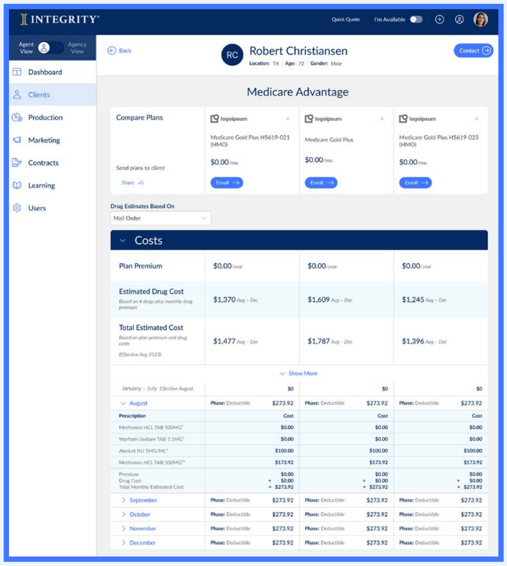
- Client information automatically pre-fills from Contact records.
- Enter the information once and it pre-fills on most quotes and applications!

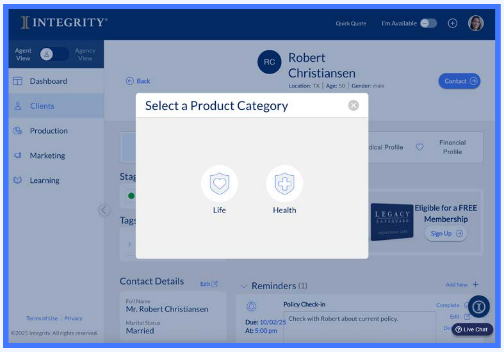
Quick Quote:

- Get a quote in less than 10 seconds.
- Never keep clients waiting.
- Easily connect the quote information to a Contact in the CRM!

Here's how to use Quote & eApp:

- Verify or update your client's doctor, prescription and pharmacy information. Or have your client make updates on their PlanEnroll Profile.
- Select a Client, then click **Start a Quote**. Select **Health**, then choose Medicare Advantage, Medicare Supplement (coming soon!) or Prescription Drug Plan.
- You'll see a list of available plans in the client's area. Go to **Filter By** to select additional filters.
- Click **Compare** to select up to three quotes to review with your client.
- Once your client selects a plan, click **Apply** to start their application. Your client's information is pre-filled in most applications.
- Then submit the application and the client can then see and accept the quote.





IntegrityCONNECT makes it easy to help clients get the right policy — quickly!

Automated Marketing

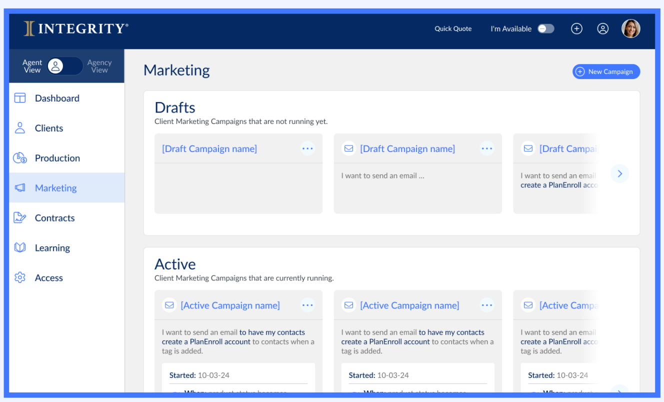
IntegrityCONNECT transforms the way you work.

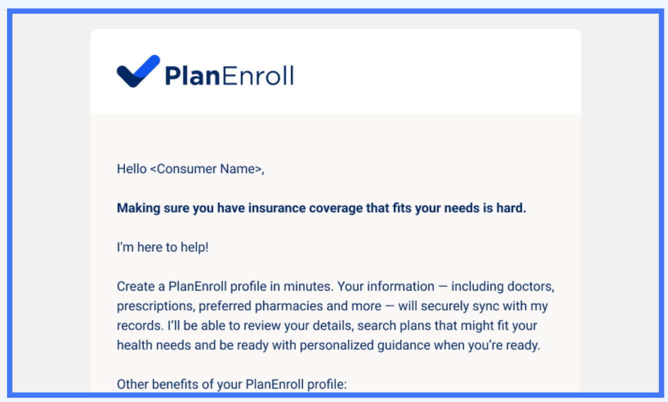
Client Connect Marketing:

- Send pre-approved, compliant email and text messages to your clients.
- Manage SOAs and other critical tasks easily.

Here's How to Use Client Connect Marketing:

- Click **Marketing**.
- Click **+ New Campaign** and enter a **Campaign Name**
- Choose if you want to send an email or text message and select the template type.
- Select the client(s) you'd like this message to go to.
- Preview the campaign, then send.
- Your name, contact information and Agent-personalized Website link are automatically included!





It's like having your own world-class marketing team built-in to IntegrityCONNECT!

Hand Raisers & Serving More Clients

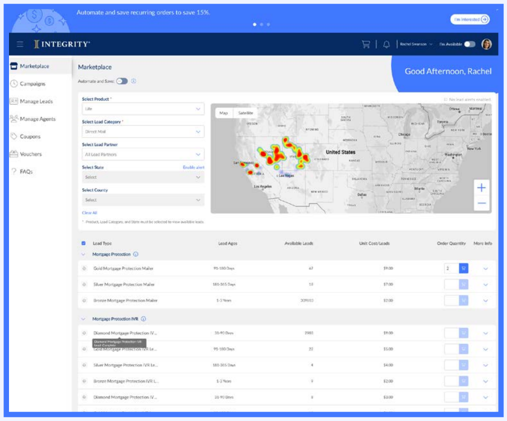
IntegrityCONNECT Leads is your source for high-quality, compliant leads. Find consumers who have their hand raised for help — and offer them the guidance they need.

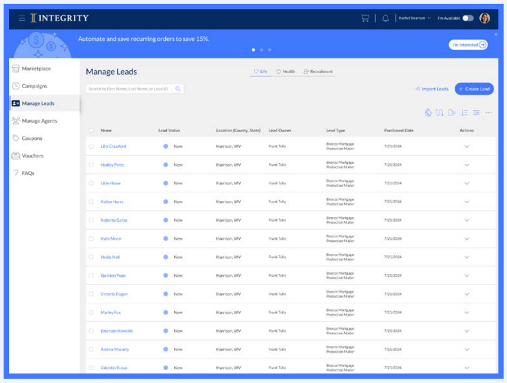
Build your book of business:

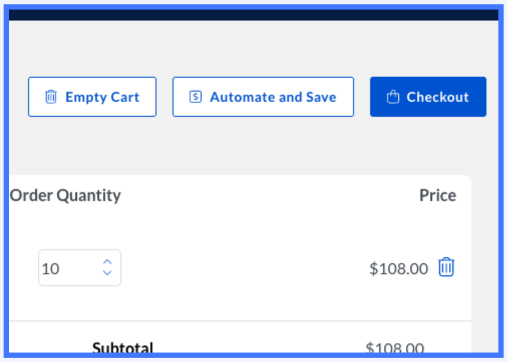
- Browse vendors and purchase leads in IntegrityCONNECT Leads marketplace.
- Search for leads by geography, lead type and lead source with our easy-to-use heat map.
- Choose from Realtime lead campaigns, customizable direct mail campaigns or on-demand leads.
- Set up Automate and Save to get 15% off of orders that repeat automatically.
- Leads purchased automatically flow into your CRM so you can easily manage the relationship from lead to sold.

Automate and Save helps you find the leads you want — and keeps new leads coming to you all while saving 15%.

- In **Marketplace**, find the leads you want and then add them to your cart.
- At checkout, click **Automate and Save,** select the **Start Date** and **Daily Recurrence,** then click **Automate and Save.**
- Available leads that meet the criteria you set will be sent to you automatically.
- You get a 15% discount on all Automate & Save orders!
- You get notified when new leads are sent to you so you can work them immediately.







IntegrityCONNECT Leads makes it simpler than ever to purchase and manage leads and take your business to the next level!

Legacy Safeguard

Help your clients leave a lasting legacy with Legacy Safeguard.

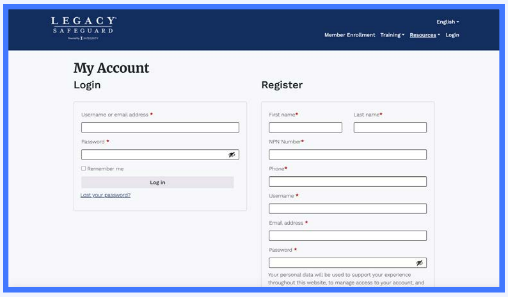
Legacy Safeguard® is a valuable membership that helps clients leave a lasting legacy for their loved ones. Connecting clients with a Legacy Safeguard membership helps them be prepared for the future, and makes you a trusted resource, too.

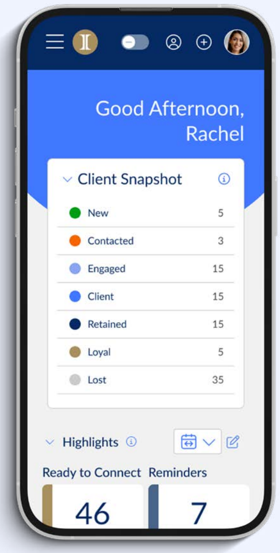
Legacy Safeguard Benefits:

- Free membership gives consumers access to legacy planning services, end-of-life planning and guidance, support for survivors and more.
- Helps reduce stress and confusion for families in their time of need.
- Legacy Planning mobile app lets members access resources on the go.
- Includes a large training library for agents to better support clients through LegacySafeguardUniversity.com.

Getting started with Legacy Safeguard:

- Visit LegacySafeguardUniversity.com
- Access learning materials and marketing guidelines
- Reach out to clients who may benefit from Legacy Safeguard membership





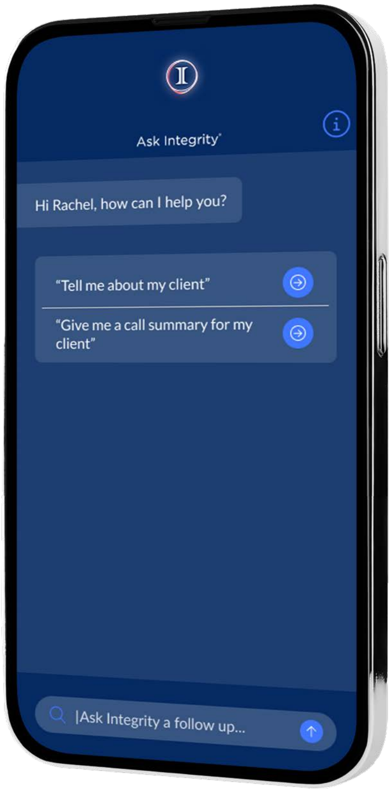
Ask Integrity

Ask Integrity® AI digital assistant provides you with expert guidance.

Ask Integrity® AI-powered data and insights are with you wherever you go — stay up to date on important information and build stronger relationships.

With Ask Integrity, you get:

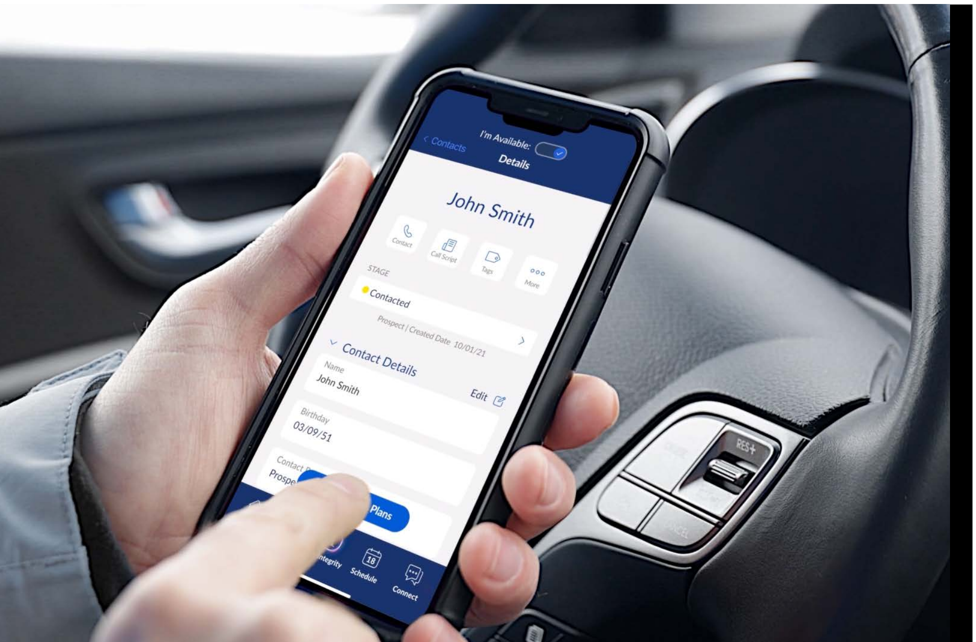
- **Client Summaries —** Know every client better with an instant, on-demand summary of key client information.
- **Automatic Meeting and Call Notes —** Summarizes prior client meeting details with one click!
- **Shopper Tags —** Identify clients likely to experience plan disruptions so you can prioritize outreach.
- **Carrier Insights** — provide insights and information about specific health carriers.
- **AI-powered Recommendations —** Expert guidance suggests products that complement current client coverage.



Ask Integrity:

Your own digital assistant, available 24/7!

Ask Integrity® AI powered digital assistant is your new superpower!

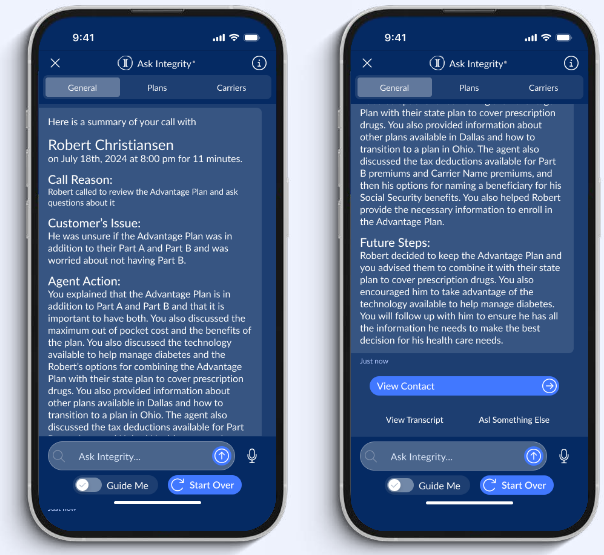


Instant Client Summaries

Ask Integrity will quickly give you an overview of any client, at any time.

Instant Client Summaries:

- Click **Ask Integrity** and type or ask for a Client Summary.
- Say or type the name of the client you'd like to hear about.
- Ask Integrity will confirm the correct client record, then tell you about your client — including location, age, the last time you talked and other helpful information.
- From here, you can get more information about your client's policies or previous meetings.



Know every client better with Ask Integrity.

Automatic Meeting & Call Notes

Get automatic meeting and call notes with Ask Integrity and your Personalized Business Phone Number.

Meeting Summaries and Call Notes:

- Never miss a detail on client calls — without needing to take notes!
- Ask Integrity summarizes prior client meeting and details with one click, and they're easy to access in the client's history or by using Ask Integrity.

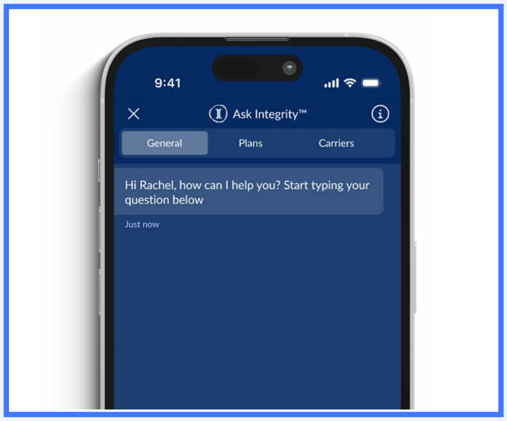
Personalized Business Phone Number:

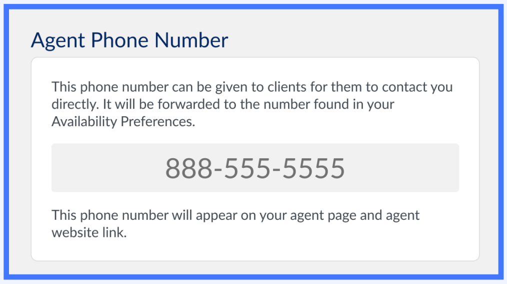
- Use your Personalized Business Phone Number to interact with prospects and clients, and you'll get Meeting Summaries and Call Notes automatically!
- You can find your Agent Phone Number in your Agent Profile and share it with your clients.
- Your Personalized Business Phone Number shows up on your Agent-personalized Website, and you can even forward calls to your number to any phone you choose.

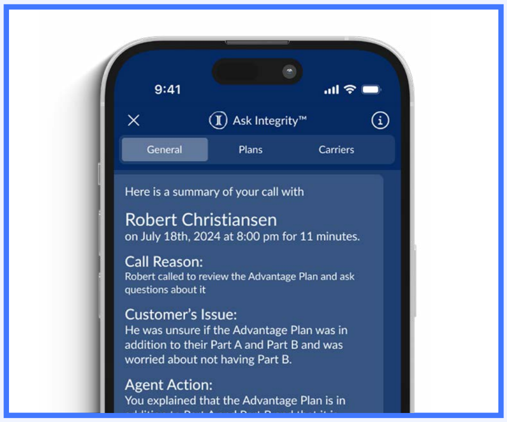
Automatic Meeting and Call Notes:

- Click **Ask Integrity** and type or ask for call notes for a client by name.
- Ask Integrity will confirm the correct client record and ask which call you'd like summarized.
- The meeting summary will show on the screen or Ask Integrity can read it out loud. You'll hear what was discussed and possible future steps.
- From this summary view, you can also see the full call transcript or open the contact record.

Work smarter, not harder with Ask Integrity.

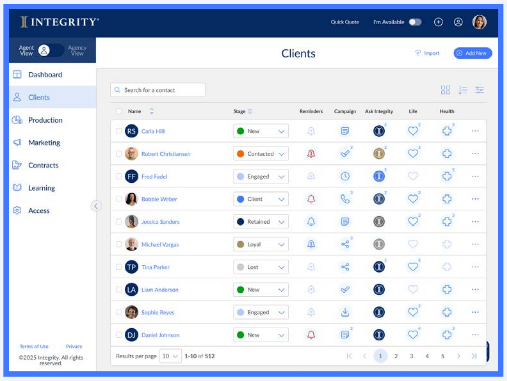






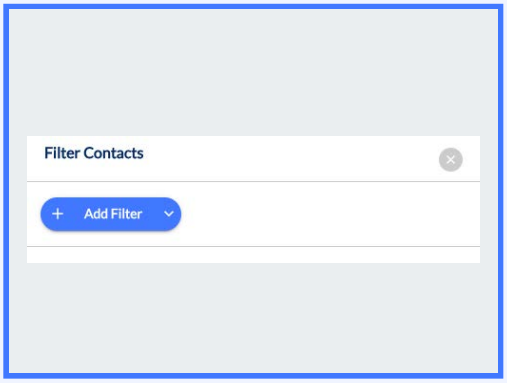
Ask Integrity Shopper Tags

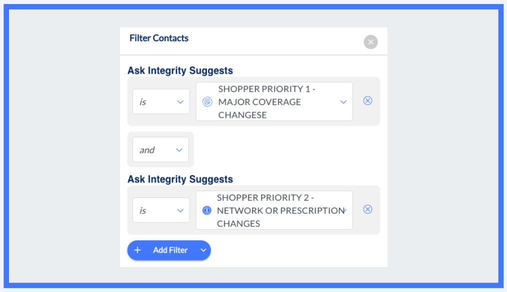
Prioritize client outreach with Ask Integrity Shopper Tags. Powered by client and carrier data, Ask Integrity Shopper Tags automatically generates lists that show you which clients may be facing plan disruption.



Shopper Tags and How to Prioritize Client Outreach:

- From your clients list, click **Filter Contacts**.
- Choose **Ask Integrity Suggests** and click on the **Shopper Tag** you want
- Your results will show contacts filtered by the Shopper Tag you chose and will give you the option to add additional filters
- Use your filtered list to easily reach out to the clients who need your help most.





Your workflow just got smarter with Ask Integrity.

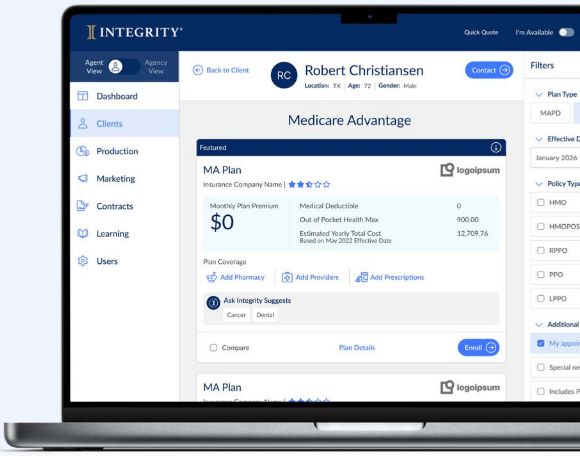
Ask Integrity Recommendations

Ask Integrity Recommendations gives you expert guidance and suggests products that complement current client coverage.

- In-the-moment sales recommendation scripts and pop-ups
- Delivers plan recommendations based on the client's full history and current health conditions

Ask Integrity Recommendations:

- When reviewing client coverage, Ask Integrity can give you in-the-moment guidance.
- For example, if you add a prescription to the client record that typically requires a specialist provider, Ask Integrity will alert you and help you choose a provider.
- Ask Integrity will also alert you to missing details that could affect quote accuracy, such as a preferred pharmacy.
- Once the coverage review is complete, Recommendations will suggest plans that may fit your client's needs, saving you time and effort!



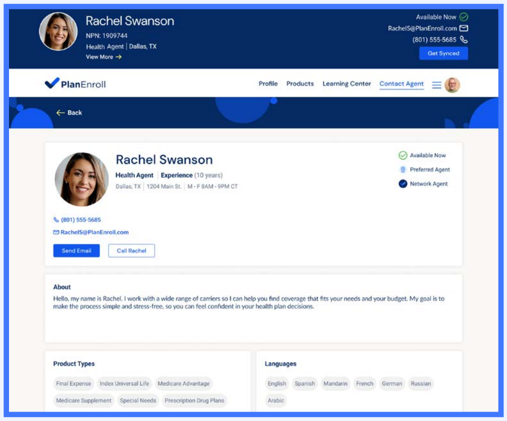
IntegrityCONNECT is smart tech to make you stronger.

Agent-personalized Website, Email & Phone

Grow your business with your own Agent-personalized Website, a PlanEnroll.com email address and Personalized Business Phone Number!

Agent-personalized Website:

A personalized space where you can connect with consumers, collect client information, share quotes and capture enrollments — compliantly.

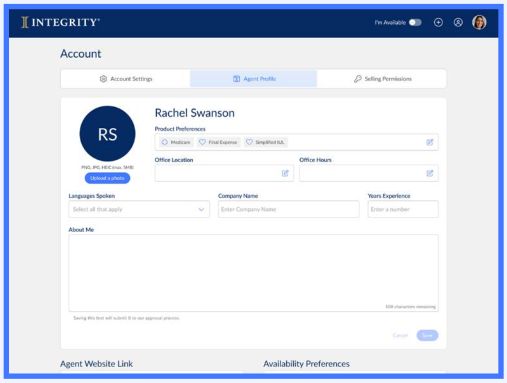


PlanEnroll.com Email Address:

Reach your clients directly with personalized messages from your PlanEnroll.com email address.

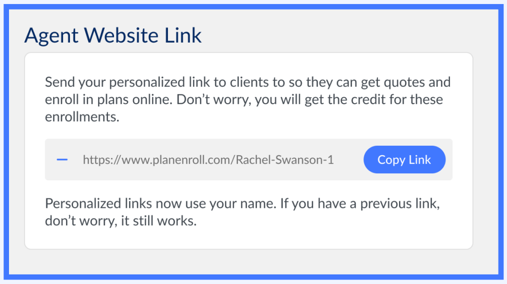
Client Sync:

Quickly capture key client information like doctors and prescriptions, and collect Scope of Appointment, Permission to Contact and more.



Here's how to use your Agent-personalized Website:

- Open your **Profile Menu**.
- Add your personalized details, including location, experience, a photo, a short bio and more.
- View and copy your **Agent-personalized Website Link**.
- Paste and share your link in emails, marketing materials and communications.
- You can email quotes to your clients and include your Agent-personalized Website Link.
- Clients can use your link to update their PlanEnroll Profile information, securely!



IntegrityCONNECT helps you stay connected to everything that matters.