

## Plan Finder User Guide

### Accessing the Plan Finder Referral Options:

There are four ways to access the Plan Finder Healthpilot referral options:

- Opportunities Now
- Medicare Plan Reviews Landing Page
- Medicare Tab on the Patient’s Profile
- Plan Finder Comparison Page

#### 1. Opportunities Now:

- a. From the left NAV bar, select “Opportunities”
- b. To filter for patients that are eligible for a Medicare plan review, select the “Medicare” button on the Opportunities Now page
- c. A list of patients Medicare opportunity attached to their profile
- d. Select “View Details” for the patient you wish to assist in finding a Medicare plan
- e. Press “Get Started” to launch the Healthpilot pop-up modal (modal displayed below)

The screenshot shows the 'Opportunities' page with a search bar and filter tabs. The 'Medicare' filter is selected and highlighted with a red box. Below the filters, a table lists patient opportunities. The first patient, SPRIGG, DEBORAH, has 1 of 8 opportunities, a next refill in 2 days, and a potential revenue of \$140. A 'Get Started' button is highlighted with a red box at the bottom of the patient's row.

Name	Opportunities	Next Refill	Potential Revenue
SPRIGG, DEBORAH 01/18/1958, Age 65	1 of 8	2 days	\$140

#### 2. Medicare Plan Reviews Landing Page:

- a. From the left NAV bar, select” Medicare Plan Reviews”
- b. Patients eligible for a Medicare plan review will be listed under the “Plan Review Eligible” tab
- c. Select the patient you want to assist in finding a Medicare plan.
- d. The Healthpilot pop-up modal will be launched (modal displayed below)

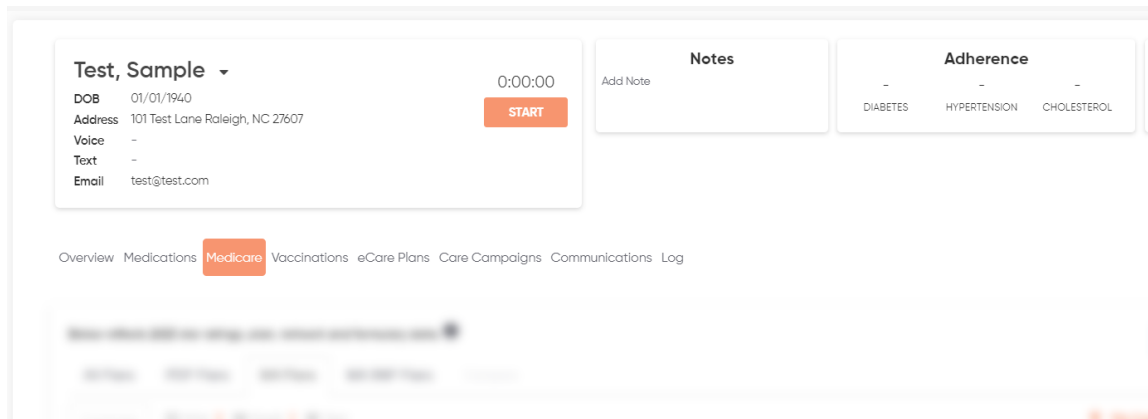
The screenshot shows the 'Medicare Eligible Patients' page with a sidebar navigation menu. The 'Medicare Plan Reviews' option is highlighted with a red box. The main content area shows a table of patients under the 'Plan Review Eligible' tab. The table has columns for Patient, Clinical Opportunities, Average Copay, RDC Maint, and Age. Three patients are listed: Fontenot, Mariah; Bagley, Teresa; and Carver, Dwiacht.

PATIENT	CLINICAL OPPORTUNITIES	AVERAGE COPAY	RDC MAINT. DIAB./HYP./CHOL.	AGE DOB
Fontenot, Mariah	1	\$3.19	69.4% -/-/84.1%	65 05/02/1958
Bagley, Teresa	1	\$14.86	74.9% -/-/-	64 07/19/1958
Carver, Dwiacht	1	\$14.29	93.0%	65

FOR INTERNAL USE ONLY

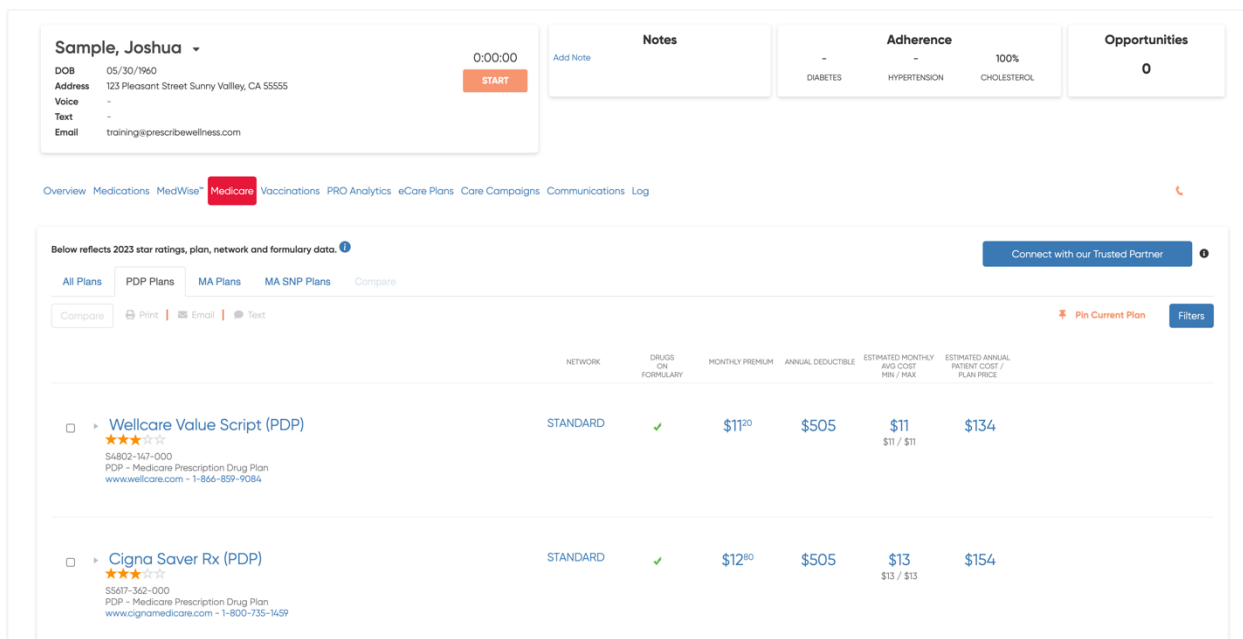
3. Patient Profile:

- a. From an Active Patient List or from a patient search result, select the patient you want to assist in finding a Medicare plan
- b. On the Patient's Profile page, select the "Medicare" button
- c. The Healthpilot pop-up modal will be launched (modal displayed below)



4. Plan Comparison Page

- a. From the Patient's plan comparison page, click on the "Connect with our Trusted Partner" button
- b. The Healthpilot pop-up modal will be launched (modal displayed below)



## Healthpilot Referral Modal

PrescribeWellness/TDS has partnered with Healthpilot to provide a tool so you can assist your patients in getting a recommendation for a Medicare plan that works with your pharmacy. This relationship provides a means to either identify a plan with your patient or refer them to contact Healthpilot. The modal provides several choices for you assist your patients:

1. "Find a Plan with Your Patient"
2. Refer your patient via a "Text" invitation
3. Refer your patient via an "Email" invitation
4. Refer your patient via a "Printed" invitation

### Plan Finder

Help your patient find a Medicare plan with Healthpilot All-New

Healthpilot makes it effortless to find the right Medicare plan for your patient's healthcare needs. Say goodbye to complicated paperwork and lengthy phone calls! Help your patient get a recommendation for a plan that works with your pharmacy by answering a few simple questions. Once the patient has identified a desired plan, the patient can submit an application or be provided with the information to contact Healthpilot. Please note, patients must make the ultimate choice to enroll in a plan and must be the one to complete the application.

**1** Find a Plan with Your Patient

**Short on Time? Connect your Patient with Healthpilot.**

Refer your patient to Healthpilot where they can review and enroll in a Medicare plan that works with your Pharmacy.

**2** Text Healthpilot Invitation   **3** Email Healthpilot Invitation   **4** Print Healthpilot Invitation

Our partners may not offer all Medicare plans in your area. This text and email may be considered a marketing message. Pharmacies must have express written consent to send marketing texts and emails to patients. Please consult with your legal counsel regarding questions or concerns.

Healthpilot is not connected with or endorsed by the U.S. government or the federal Medicare program.

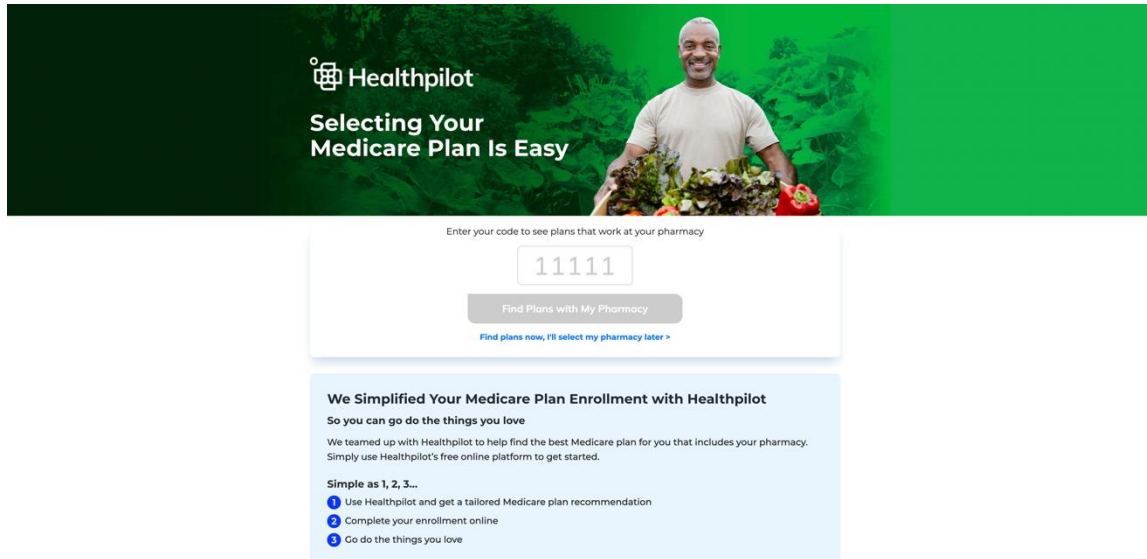
By continuing you agree to our [Terms of Service](#)

[Plan comparison](#)   [Decline Plan Review](#)

The list of Medicare plans will only include plans contracted with your pharmacy.

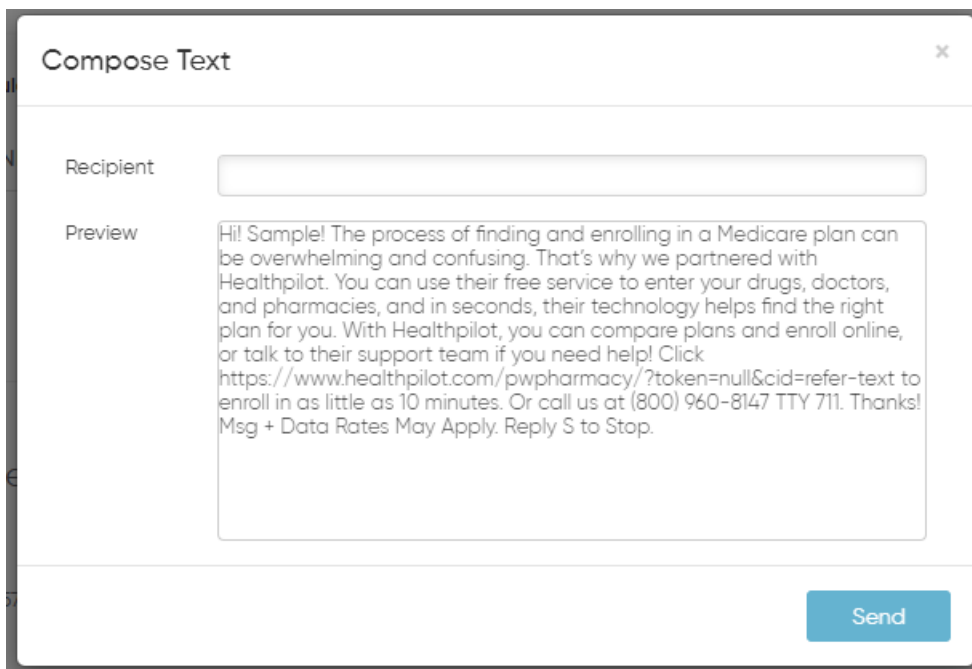
**1. “Find a Plan with Your Patient” with Healthpilot**

- a. When you select the “Find a Plan with Your Patient” button, a new tab will open and the Healthpilot Medicare Portal will be launched.
- b. A pharmacy “token” will automatically be loaded into the Healthpilot Portal identifying your pharmacy.
- c. Only plans that you are in network with will be displayed to the patient.



**2. Text Healthpilot Invitation**

- a. Selecting the Text invitation will open the “Compose Text” pop-up modal.
- b. Confirm the patient’s phone number, or enter the correct number to send the text.
- c. The text content will include your pharmacy’s identifying token so the patient will see your pharmacy’s In-Network Medicare plans.
- d. Press “Send”.



### 3. Email Healthpilot Invitation

- a. Selecting the Email invitation will open the “Compose Referral Email” pop-up modal.
- b. Confirm the patient’s email address, or enter the correct address to send the email.
- c. The email content will include your pharmacy’s identifying token so the patient will see your pharmacy’s In-Network Medicare plans.
- d. Press “Send”

Compose Referral Email

From: donotreply-medplanreview@prescribewellness.com

Recipient: test@test.com

Cc:

Subject: Welcome to Medicare - Let's Make It Easy Together!

Preview: Dear Sample,  
Medicare is a major milestone, and we want to help you have a smooth transition into this new chapter of your healthcare journey.  
The process of finding and enrolling in a Medicare plan can be overwhelming and confusing. That's why we partnered with Healthpilot. You can use their free service to enter your drugs, doctors, and pharmacies, and in seconds, their technology helps find the right plan for you. With Healthpilot, you can compare plans and enroll online, or talk to their support team if you need help!  
Explore plans in your area where Training Pharmacy is a participating pharmacy...  
Visit us online: https://www.healthpilot.com/mypharmacy/?token=full&id=referral-email

Send

### 4. Print Healthpilot Invitation

- a. Selecting the Print invitation will open the “Print Preview Page”.
- b. Confirm the patient’s information.
- c. The print content will include your pharmacy’s identifying token so when entered in the Healthpilot Medicare Portal, the patient will see your pharmacy’s In-Network Medicare plans.
- d. Print the document.

Sample Test Training Pharmacy  
9704 Jeronimo, Irvine, CA 92618 USA  
(515) 280-2913

Hi Sample,

Medicare is a major milestone, and we want to help you have a smooth transition into this new chapter of your healthcare journey.

The process of finding and enrolling in a Medicare plan can be overwhelming and confusing. That's why we partnered with Healthpilot. You can use their free service to enter your drugs, doctors, and pharmacies, and in seconds, their technology helps find the right plan for you. With Healthpilot, you can compare plans and enroll online, or talk to their support team if you need help!

1. Visit us online: [www.healthpilot.com/mypharmacy](http://www.healthpilot.com/mypharmacy)  
2. Then, enter our pharmacy code:

You can get a quote and enroll in as little as 15 minutes. Get started today!

Sincerely,  
Training Pharmacy

Healthpilot is not connected with or endorsed by the U.S. government or the federal Medicare program. The purpose of this email is the solicitation of insurance. We do not offer every plan available in your area. Any information we provide is limited to those plans we do offer in your area. Please contact Medicare.gov or 1-800-MEDICARE to get information on all your options. The recommendations given by Healthpilot is based on the information you provide and limited to the plans offered by the insurance companies with which Healthpilot is contracted. Inaccurate or incomplete information will impact the results of the recommendation. Healthpilot.com is owned and operated by Healthpilot Technologies LLC, a licensed health insurance agency, also doing business as Healthpilot Insurance Services in the state of California. 2023-0386  
Medicare has neither reviewed nor endorsed this information.

Print 1 page

Destination: Save as PDF

Pages: All

Pages per sheet: 1

Save Cancel

**Additional Plan Finder functionality**

- a. If the patient declines your invitation to assist them in researching Medicare Plans, the “Decline Plan Review” feature is available on the Healthpilot pop-up modal.
- b. The PEC Medicare Plan Finder does retain its previous plan comparison functionality for those pharmacies interested in that pathway. It can be accessed by clicking “plan comparison” on the Healthpilot pop-up modal.

The image shows a 'Decline' modal window. At the top left is the title 'Decline' and a close button 'x'. Below the title is a 'Reason' field with a dropdown menu currently showing 'Select'. A horizontal line separates this from the 'Note' field, which is a text area containing the placeholder text 'Add Note'. Below the text area is a red warning message: 'Max Length 250 characters'. At the bottom of the modal are two buttons: a white 'Cancel' button on the left and an orange 'Decline Plan Review' button on the right.