



**PURL Reference Guide for Producer and Telesale agents**

**For**

**RFS754-Medicare Enrollment Portals: Agent-Specific URLs**

**&**

**RFS841-Producer Portal Update for PURL**

**Introduction:**

After April 16<sup>th</sup> 2021, the medicare portal will host a new functionality for sending referrals which will allow the agents to send referral emails, enrollment kits and roadmaps directly from the portal. In addition, agents will be able to track/view any activity after sending out these referrals.

The goal of this quick reference guide is to familiarize the agents with this new functionality so that they can use it to their utmost benefit.

**New Links:**

Post April 16<sup>th</sup>, 2021 release, when agents land on the medicare portal dashboard page, they will notice two new links under 'Quick links' as shown below in figure 1.

- a) Send Referrals
- b) PURL Activity

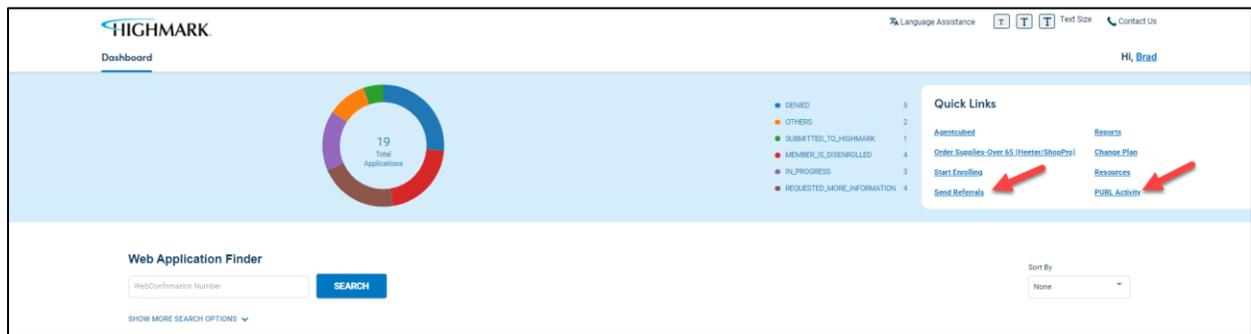
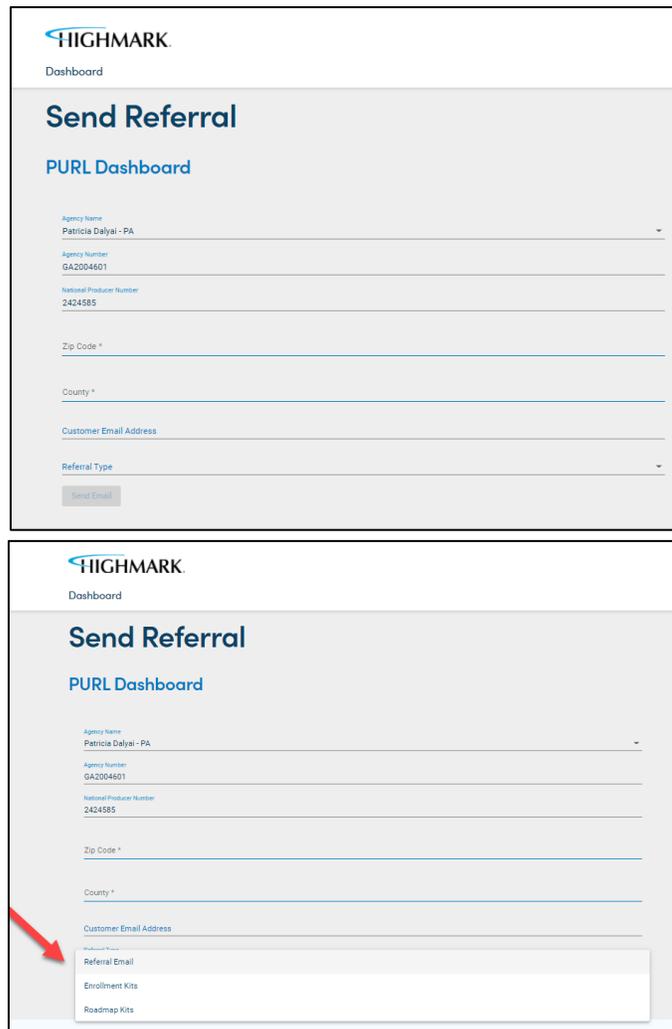


Figure 1: New links on the Agent dashboard

- a) The 'Send Referrals' link will direct an agent to a page (figure 2) for sending a referral. The agent/agency details will be prepopulated on this page. The scroll down button will allow them to choose the kind of referral they plan to send to a customer. Once they complete all the fields, and click send, the customer will receive an email with a clickable link inside it depending on the referral type sent.



**HIGHMARK**  
Dashboard

## Send Referral

### PURL Dashboard

Agency Name  
Patricia Dalyal - PA

Agency Number  
GA2004601

National Producer Number  
2424585

Zip Code \*

County \*

Customer Email Address

Referral Type

Send Email

Figure 2: Send Rererral page



Figure 3: Shortcut link to reach the PURL Activity page

- b) The 'PURL Activity' link directs a user to PURL dashboard page (Figure 4), providing a summary of the activities after sending referrals. The dashboard includes two main components, a bar chart displaying the PURL status and PURL progress which shows the details for each PURL activity in a tabular form.

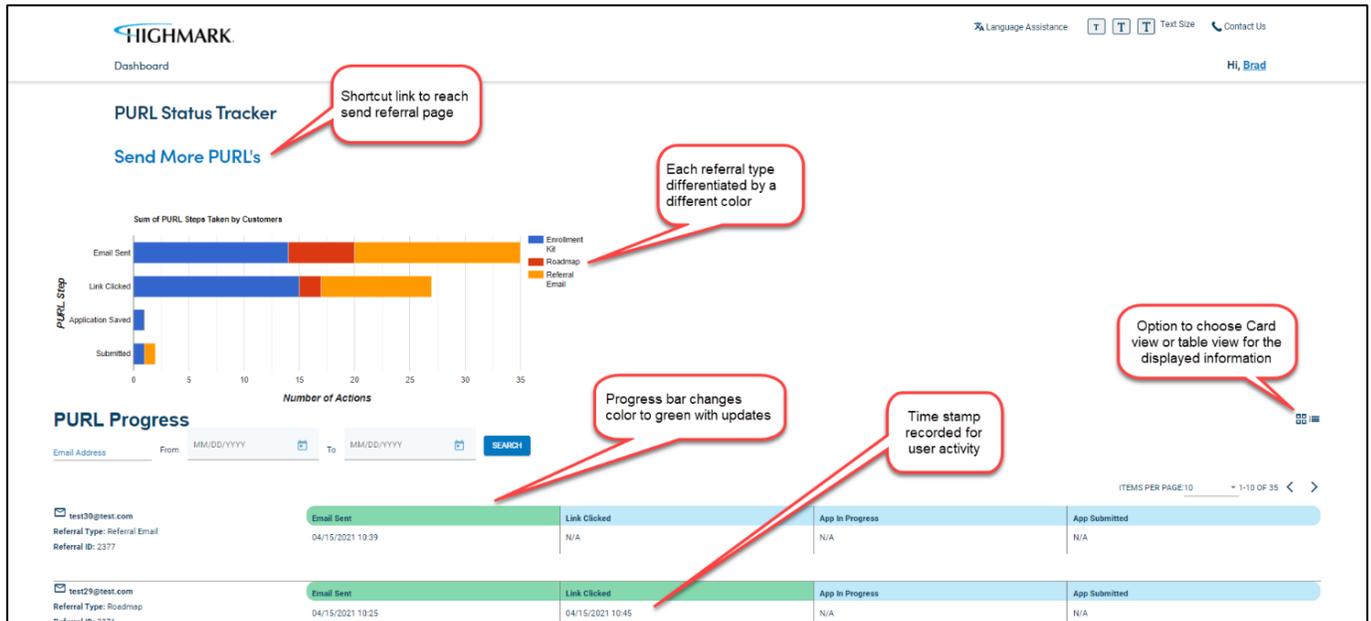


Figure 4: An overview of PURL Dashboard

**Additional features and scenarios:**

When a user hovers over the bars in bar chart, it will display the numeric value associated with that item as shown in figure 5.

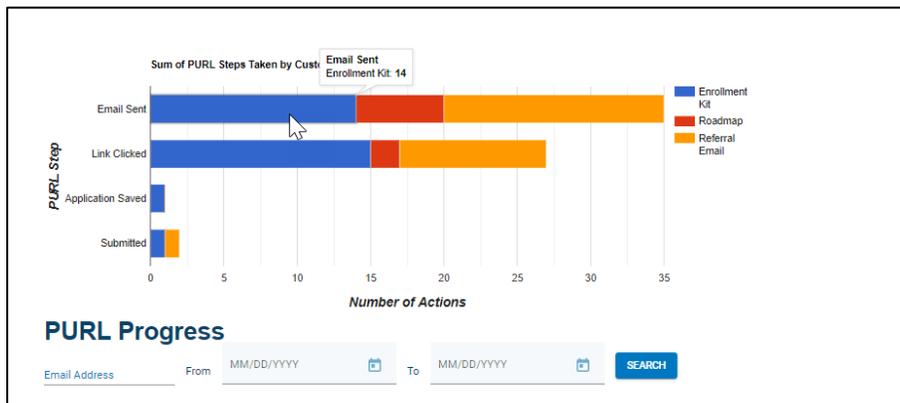


Figure 5: Bar chart displaying the PURL summary

PURL progress can be viewed in two formats as shown below by clicking the respective button on the page:

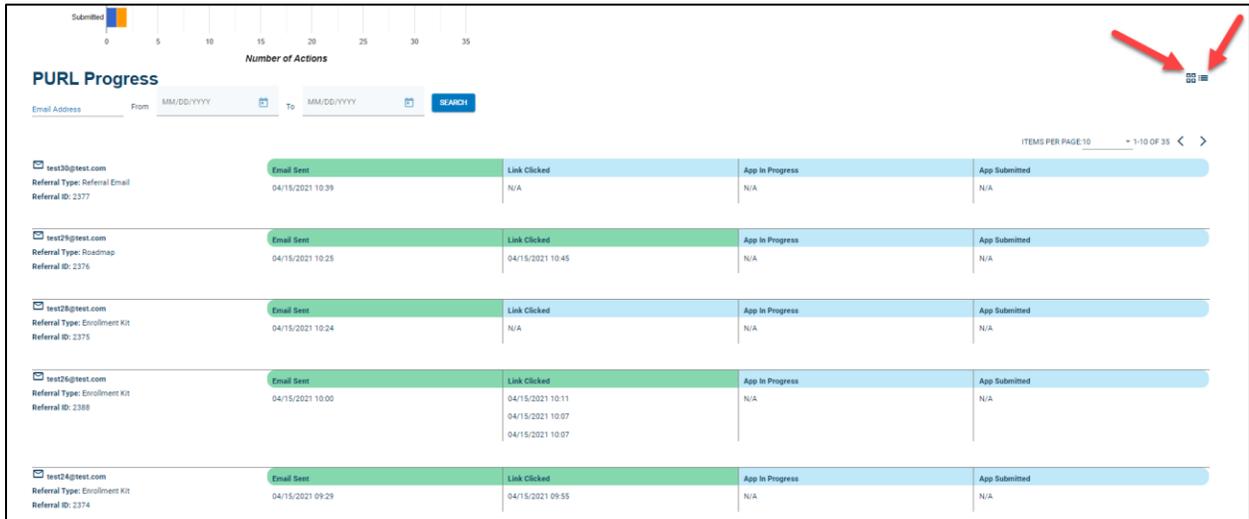


Figure 6: Card view of PURL progress

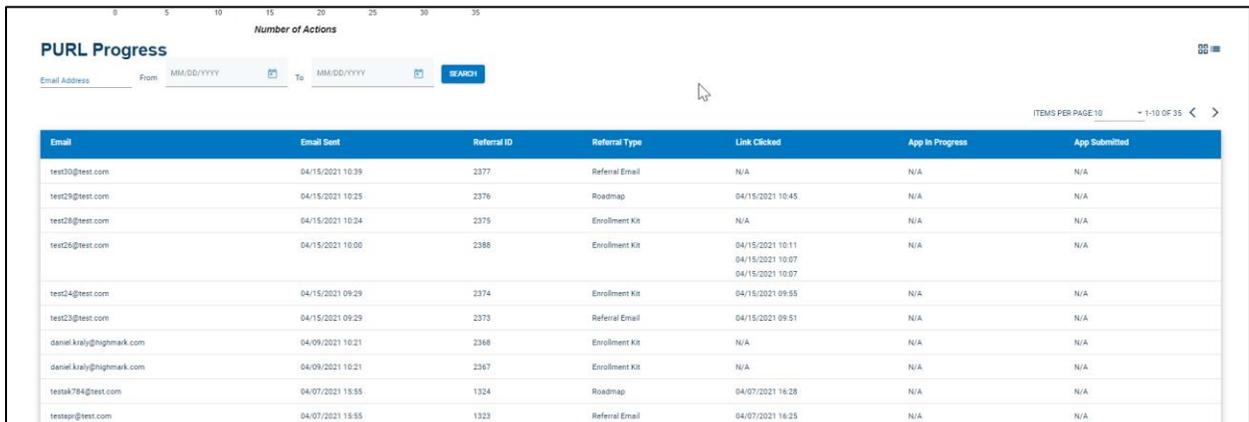


Figure 7: Tabular view of PURL progress

Figure 8 simulates a scenario in which a user clicked on a referral email link a few times before they actually completed and submitted an enrollment.



PURL Progress				
Email Address	From	To	SEARCH	
test3@test.com	MM/DD/YYYY	MM/DD/YYYY		
Referral Type: Referral Email Referral ID: 2399	<b>Email Sent</b>	<b>Link Clicked</b>	<b>App In Progress</b>	<b>App Submitted</b>
	04/15/2021 13:19	04/15/2021 13:52 04/15/2021 13:43 04/15/2021 13:43 04/15/2021 13:42 04/15/2021 13:42 04/15/2021 13:42 04/15/2021 13:41	N/A	APP-10010840 04/15/2021 13:40 APP-10010839 04/15/2021 13:37

Figure 8: PURL progress for two enrollments with one referral ID

The user also started another enrollment (say for a family member) from the same email link. In this situation the system will track the entire activity by providing a time stamp under each activity type and by providing an application ID for each completed enrollment.

**Tracking (Referral emails):**

The tracking associated with referral emails has been elaborated here. Please note that tracking is carried out using a unique system generated referral ID (which can be seen mentioned in the purl progress table) that is carried in the url.

1. **Email Sent:** When a producer sends a referral email, this condition is satisfied. The system will save the time stamp associated with this activity under the PURL Progress section
2. **Link Clicked:** When a user clicks the link in the referral email they receive, the system will direct the user to medicare consumer portal. Once this condition is satisfied, the system will save the time stamp associated with this activity under the PURL Progress section
3. **Application Saved:** When a user begins an enrollment (after the link is clicked) and saves it, this condition is satisfied. The system will save the time stamp and application ID associated with this activity under the PURL Progress section
4. **Submitted:** When a user completes all the required information for an enrollment and submits the application, this condition is satisfied. The system will save the time stamp and application ID associated with this activity under the PURL Progress section

**Tracking for Enrollment kits and Roadmaps:**

The tracking associated with emails sent out for enrollment kits and roadmaps is similar to referral email with a few difference, the same has been elaborated here:

1. **Email Sent:** When a producer sends a referral for enrollment or a roadmap kit, this condition is satisfied. The system will save the time stamp associated with this activity under the PURL Progress section



2. **Link Clicked:** When a user clicks the link in the referral email for an enrollment or roadmap kit, the system will direct them to the region-specific kit. These kits have links which when clicked can direct a user to the Medicare portal. Once the user is directed to the Medicare portal, this condition is satisfied and will be considered a 'link clicked'. The system will save the time stamp associated with this activity under the PURL Progress section
3. **Application Saved:** When a user begins an enrollment (after they reach the Medicare portal) and saves it, this condition is satisfied. The system will save the time stamp and application ID associated with this activity under the PURL Progress section
4. **Submitted:** When a user completes all the required information for an enrollment and submits the application, this condition is satisfied. The system will save the time stamp and application ID associated with this activity under the PURL Progress section