INTEGRITY

QUICK START GUIDE

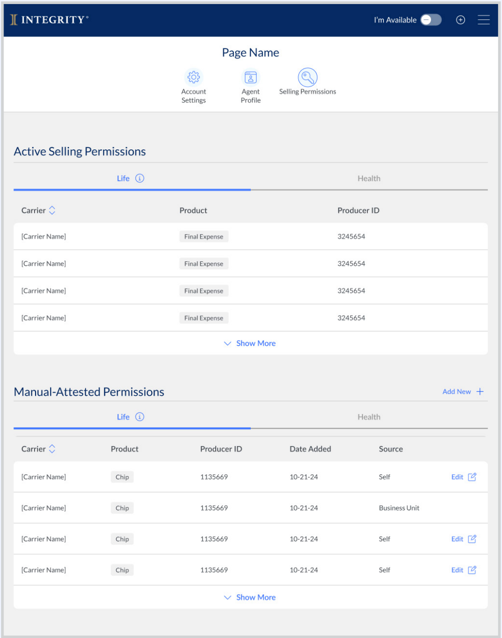
Welcome to the Integrity technology platform! By creating your account, you've completed the first step towards saving both time and effort spent in data management, where you can let Integrity do the heavy lifting instead.

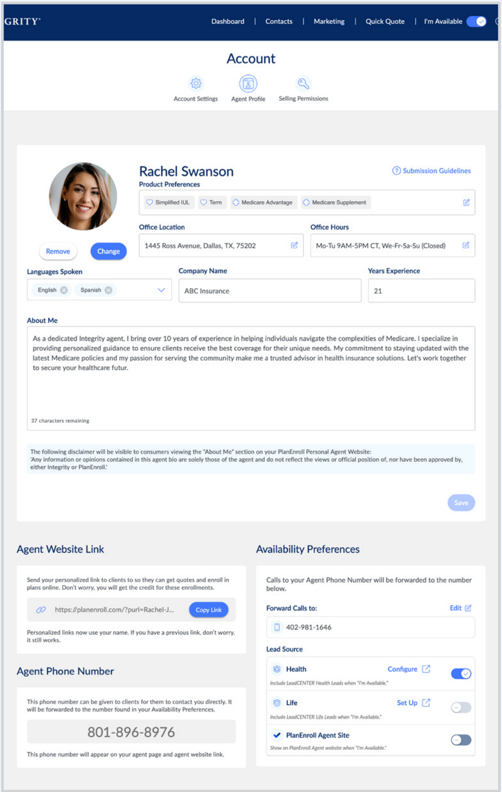
To finish setting up your account and begin using Integrity's technology to the fullest, follow the remaining steps below:

Step 1: Check Your Active Selling Permissions

First you'll want to your verify and update you active selling permissions (the carriers you're appointed with).

- To verify your **selling permissions**, click or tap Selling Permissions next to Agent Profile under Account.
  - **Active Selling Permissions** shows the list of products that have already been added for you, based on carrier appointments. This list is available for both Life and Health products.
  - If any of your products or carriers are missing, you can manually attest to them in the **Manual-Attested Permissions** section. Click or tap **Add New**, then enter the carrier, product type and the Producer ID you use with that carrier. Manual attestations for Health products expire if the carrier doesn't verify the attestation within five days. Manual attestations for Life products don't expire.
  - Additionally, for compliance purposes, not all Health carriers/products may be available for self-attestation.





Step 2: Review And Update Your Agent Profile

Your Agent Profile settings play a crucial role in streamlining your experience in the platform. Most importantly, you'll want to update your Product Preferences to tell us, and your clients, which coverage products you specialize in selling.

- Click on the **profile bubble** with your initials in the top right corner of the navigation bar, then select **Account**. If using the mobile app, tap the three-bar icon, then tap Account
- Under Account, click or tap the **Agent Profile** icon
- First you'll want to click the edit icon on in the **Product Preferences** and then select the specific Life and Health product(s) you sell.
  - This critical step determines what products and features are available to you in your platform, and your clients on your Personal Agent Website, as well as which brand name your Personal Agent Website & Client Connect communications will reflect (PlanEnroll or MyIntegrity).
    - » PlanEnroll.com and MyIntegrity.com are Integrity's nationally advertised consumer facing websites, where consumers can learn, shop, and apply for products online and securely save their preferences and information.
    - » Each agent automatically receives their own Personal Agent Website (PAW) on PlanEnroll.com or MyIntegrity.com, depending on which products they selected in Product Preferences. This site is where their prospects and clients can find out more about the agent, contact them, and apply for health plans directly - in which case the agent receives the commission for the sale.
- Take this time to update the rest of your Agent Profile:.
  - Update your photo by clicking **Change** next to the profile bubble on the left to load a professional headshot of yourself for your prospects and clients to view from your Personal Agent Website.
  - Update your **Office Location** and **Office Hours** to ensure your prospects and clients know where you are located for meeting purposes.
  - Additionally, update your **Languages Spoken, Company Name** (your agency name), and **Years Experience**.
  - You can also further personalize your page by adding a short bio in **About Me** that meets our **Submission Guidelines** (found under the Submission Guidelines link in the upper right corner of your profile).
  - Now your Integrity platform and Personal Agent Website will be updated with products, brands, and information you need to effectively serve your prospects and clients! To start using your Personal Agent Website (see below).

Step 3: Verify Your Assigned Phone Number Is Working

Each agent also receives an **Agent Phone Number** to use for sales calls. You can forward calls that come in to your Agent Phone Number to your cell, office or home phone. You can also change where the calls forward as often as you like — making it simple to have calls route to your office phone during the day and to your cell phone after hours. It's all in your control.

Calls made to and from your Agent Phone Number are automatically recorded, and the recordings of sales calls for Health products are stored for 10 years per CMS regulation. Whether you sell Life, Health or both, you can use the recordings for sales training and quality assurance, and the recordings are used by Ask Integrity™ to automatically generate call summaries and transcripts for you.

- Your **Agent Phone Number** is found in **Account,** then **Agent Profile** in the Agent Phone Number section.
- The platform attempts to assign a phone number with the same area code as the phone number you used to register your account. If no phone numbers are available with that area code, the platform will find a phone number in the closest area code possible geographically. If you need help with your Agent Phone Number, please contact Support.
- Choose where to forward your Agent Phone Number in the **Availability Preferences** section in the **Agent Profile** page. By default, it will be forwarded to the phone number you used to register your account.

Step 4: Using Your Personal Agent Website (PAW)

Now that your Profile is all set, and your Personal Agent Website is ready to go, you can start using it in your marketing materials and communications!

- To find your Personal Agent Website link go to your **Account**, then **Agent Profile** in the **Agent Website Link** section, and hit **Copy Link** button
- Send it to your prospects and clients alike. When they create a consumer profile using your PAW, a new Contact Record will be created (or the existing record will be updated automatically). Changes sync between PlanEnroll/MyIntegrity and your Contact Records, so you will see any changes made by the consumer, and the consumer will see any changes you make.

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Step 5: Set Your Availability Preferences

Your availability is used in two ways:

- On your Personal Agent Website, to show that you're available to take calls.
- And, if you create a Realtime Call Lead Campaign in LeadCENTER, your availability is used to route the Realtime lead calls to you. Only agents who mark themselves as available will receive these leads. You can choose to mark yourself Available for Life leads, Health leads or both, but you must also set up a lead campaign (purchase leads) per product in LeadCENTER.
  - You can set up a lead campaign in LeadCENTER by clicking or tapping **Create Campaign,** then following the steps to create a campaign. Once you have at least one Realtime Call Lead Campaign running, the link next to Availability will take you to your existing campaign(s) in LeadCENTER.

Availability Preferences are found on the **Agent Profile** page.

After you set your preferences, mark yourself as available by tapping or clicking the switch next to I'm Available at the top of the screen. Click or tap it again when you're unavailable to receive calls — but don't forget to turn it back on next time you are available!

Congratulations! Your account is now fully set up and ready to use.

Take the Next Step

Integrity Technology is built for agents, by agents.

And it's designed to work the way the industry's best agents work. If you want more in-depth information about how to get the most out of our technology, we have a variety of trainings, guides and resources available to help drive your success.

Training and Resources:

- Live trainings to demonstrate how to get started and keep going strong
- On-demand library of prerecorded trainings
- Downloadable guides with step-by-step instructions available on LearningCENTER
- LeadCENTER has a robust Frequently Asked Questions section
- Get personal assistance from the Integrity support team

Help more clients. Drive your success. Integrity Technology: For agents. By agents.