# Real-time Customer Lookup



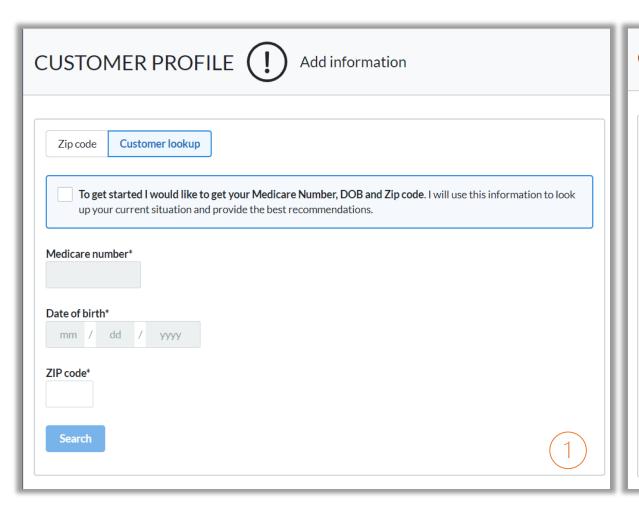
## What Does SunFire's Customer Lookup Do?

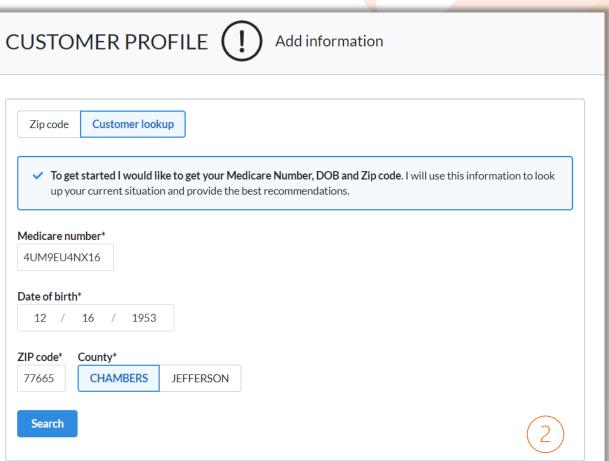
- Confirm the MBI number matches the CMS database
- Check LIS subsidy eligibility
- Confirm A&B effective dates
- Inform the Agent when the customer is missing Part A or B dates

- Display current coverage and prior coverage\*
- Prevent a customer from reenrolling in their current plan
- Medicaid Eligibility (True/False)
- Enrollment form is prefilled with MBI, A&B, DOB, Addresses (res. and mailing), and Medicaid status (Yes/No)



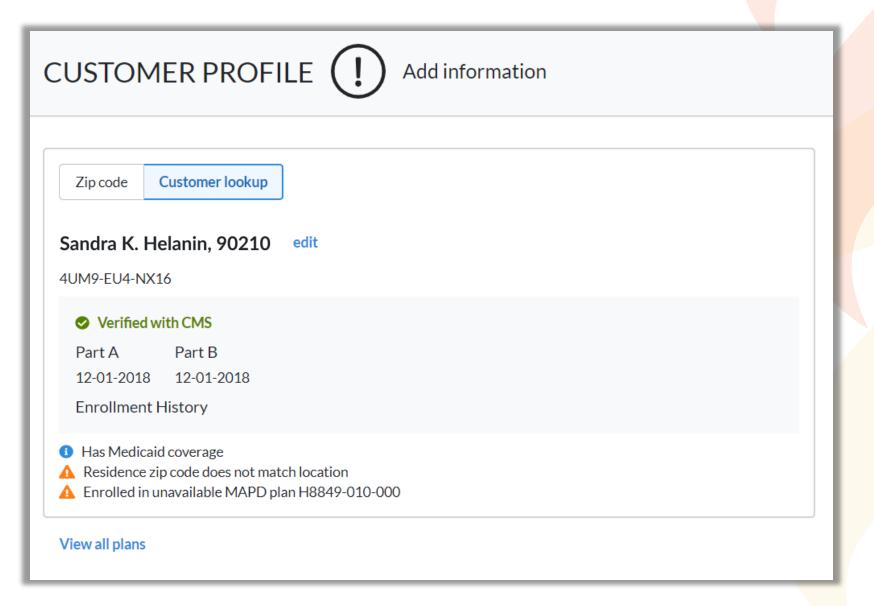
# **Customer Profile Changes**







### **Return Results**





# **A&B Confirmation and Enrollment History**

Zip code

**Customer lookup** 

Sandra K. Helanin, 90210 edit

2EG5TE9M479



Verified with CMS

Part A Part B

03/01/2019 03/01/2019

#### **Enrollment History**

Humana Gold Choice H8145-061 (PFFS)

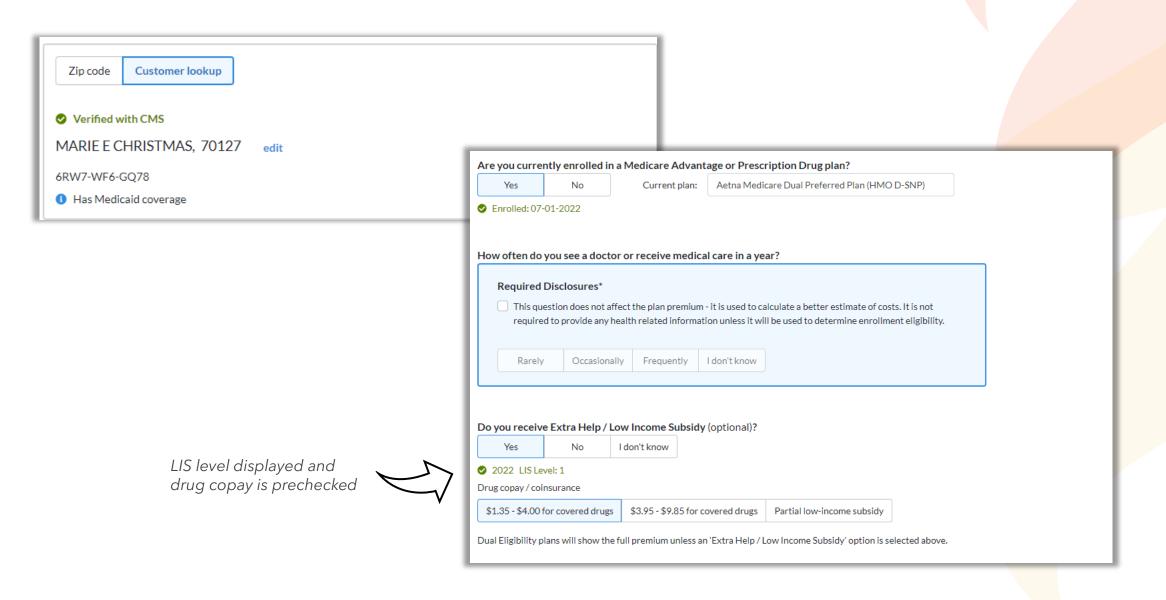
01/01/2021 - Current

Humana Walmart Value RX Plan H145-062 (PDP)

01/01/2020 - 12/31/2021

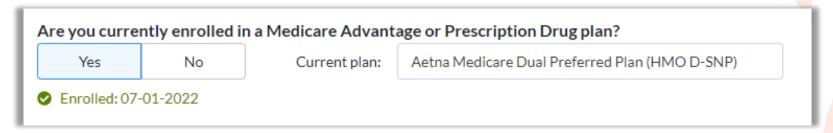


# LIS Subsidy Eligibility

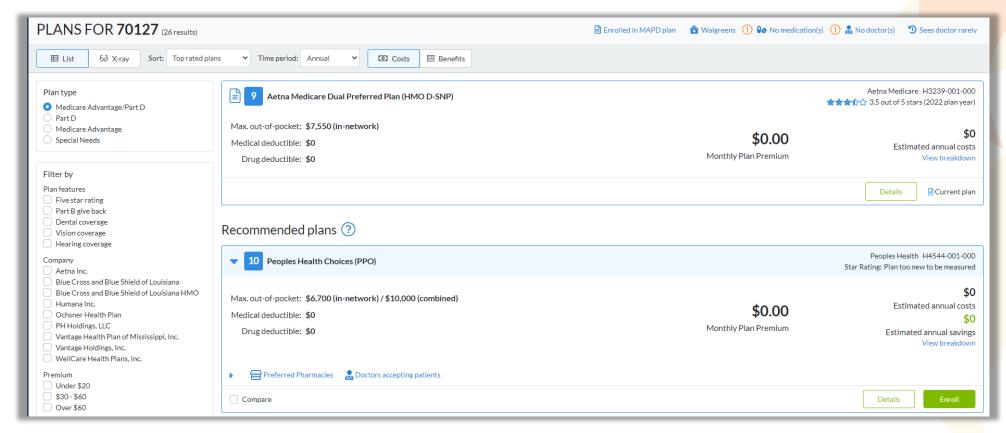




### **Current Plan Indication**

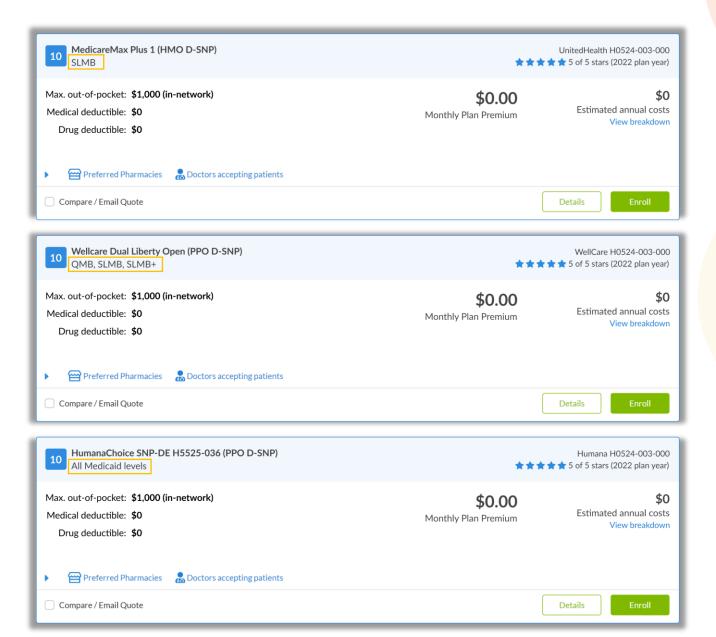


\*Enrolled date available within needs assessment





### Medicaid Levels on DSNP Plan Cards





### **Enrollment Form Prefill**

