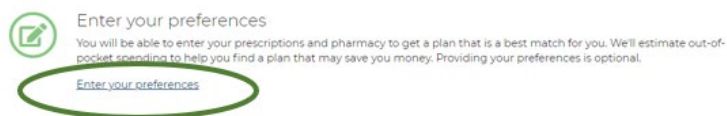
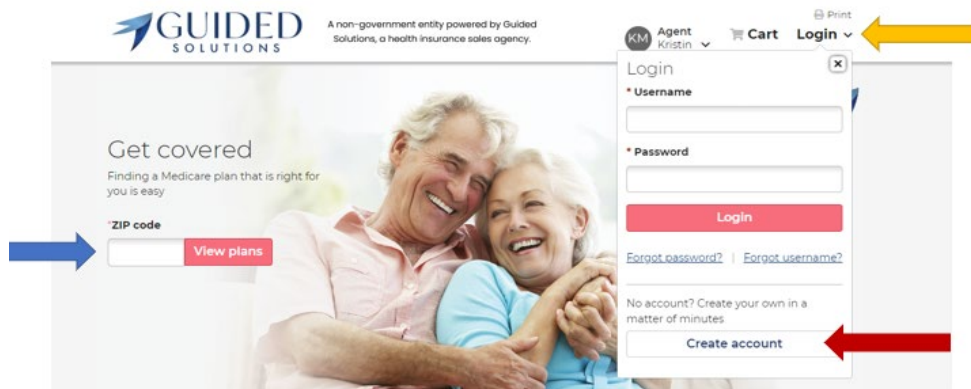


IN PREPARATION TO REVIEW YOUR MEDICARE OPTIONS, HERE ARE YOUR NEXT STEPS!

KMI uses Guided Solutions, a web-based quoting and enrollment tool, to help our clients review and choose Part D Drug Plans, Medicare Advantage Plans and Medicare Supplement Plans.

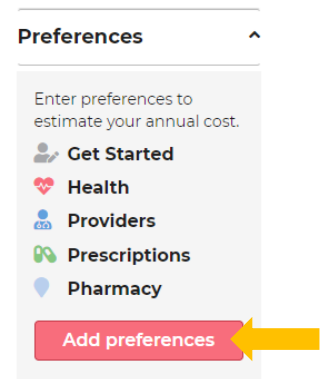
- **Log In or Create an Account in our *Guided Solutions Shop & Enroll Tool***

1. Go to <https://kristinmanwaring.com/> and hover your mouse over the Medicare tab at the top of the page.
2. On the drop-down menu, select “**Choose a Plan - 2024**”, scroll down to the middle of the page, and click on “**Shop & Enroll Tool 2024**” button. If you don’t already have an account, please create an account by clicking “Login” on the top right of the page, and then click “Create Account” at the bottom of the pop-up window to set up your username and password.

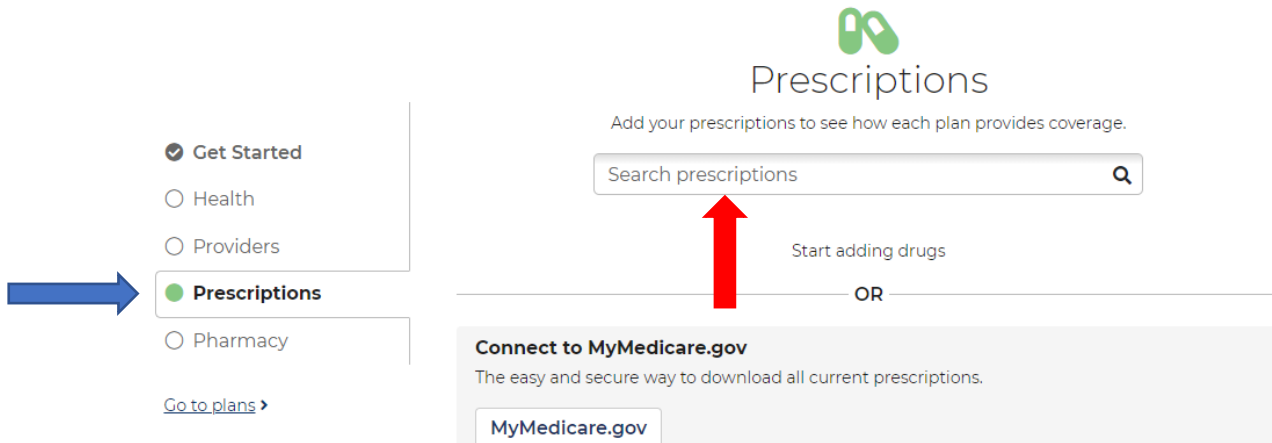


- **Enter Your Preferences - Prescription Medications and Pharmacy**

- If you take prescription medications, we invite you to enter each of them into the system along with your preferred pharmacy selection(s). Providing this information allows us to make plan recommendations based on your unique health needs.
- Please have your prescription list or your medications at hand before you start. To ensure each prescription entry is saved, do not step away from this process to ensure the system doesn’t time out.
 1. To add your prescription medications, click the Pink “Add Preferences” button on the left-hand side of the page located under the “Preferences” folder. Please disregard the “Get Started”, “Health”, and “Providers” choices on the left side of the page and go directly to “Prescriptions” to enter your medications.



2. On the “Prescriptions” page, click on the “Search prescriptions” bar and start typing the prescription medication into the search bar. After the first three or four letters of the prescription name, there should be a drop-down list of options to choose from. Select the correct prescription from the drop-down list; then select the correct dose, form, and quantity you use monthly and/or other frequency and then click “Add”. Repeat this step for each of your medications.



IMPORTANT: To avoid issues, please enter your medications manually, and do not click on the link to the MyMedicare.gov site to download your medications.

Click the pink “Continue” button at the bottom right to save your info. This will take you to the add pharmacy page.

3. Enter Your Pharmacy

1. To select your pharmacy preferences, click on “Pharmacy”, and use the plus and minus signs on the map to zoom in/out and then click “Search this Area” located on the map.
 - Please be aware that options may not show unless you use the zoom in/out feature.
2. Locate your pharmacy on the list provided, and then click “Add Pharmacy”.

4. Review and Finalize

1. To view your Drug plan options, click “Continue” and then click the “**Prescription Drug Plans**” tab at the top. Be sure to click on the “Sort” drop-down menu and choose “Total Estimated Cost”. Once you do this, the top plan shown will have the lowest yearly out-of-pocket costs.
2. At this point, please pause the process and do not self-enroll, unless you are confident in your plan choice.
3. As the last step, please log out and log back in to confirm your information and then call our office at (360) 385-4400 to let us know your information has been saved in our Guided Solutions tool, so we can send you an electronic **Scope of Appointment (SOA)** form.
 - I. This SOA form is a DocuSign Form that will be e-mailed from do.not.reply@drx.com.
 - II. This is a required form that gives us legal permission to discuss Medicare Part D and/or Medicare Advantage plans with you as needed.
 - III. **The SOA form must be received by our office 48 hours in advance of your appointment.**

Feel free to call our office if you have any questions or difficulties as you are completing this process, we are happy to help!

*Be sure to refer to our website at www.kristinmanwaring.com for the latest instructions on using Guided Solutions.