

How to Filter Carriers and Plans from Quoting in LA Pro

It is very easy to filter out certain carriers and plans you do not want to quote in Lead Advantage Pro. An example of plans you may want to filter from your quotes are the non-commissionable PDPs from Cigna and Humana.

Lead: test leser

Email Quotes eSignature SOA Modify Quote

For Agent Use Only -- All plan information below is in effect from Jan 1st to Dec 31st (Plan Year 2021)

Part D Combined MAPD MA Only SNP See All Part D

Policy Eff	Zip	County	State	DOB	General Health	Extra Help?	Type of Help
01/01/2021	24503	Bedford	VA	11/10/1955	Good	No	N/A

Carrier/Plan	Commissionable	Rate
Cigna Secure Rx (PDP) (CIGNA NO COMMISSIONS PAID) 2021-55917-219-000	No	\$26.10 \$445.00 \$313.20 [?]
SilverScript Choice (PDP) (Aetna-SilverScript) 2021-55901-014-000	Yes	\$26.70 \$380.00 \$320.40 [?]
Humana Basic Rx Plan (PDP) (HUMANA NO COMMISSIONS PAID) 2021-55884-132-000	No	\$27.00 \$445.00 \$334.80 [?]

Follow the easy instructions below to remove these carriers as well as any other carriers you do not want showing in your Medicare quotes.

Step 1 – Select “Admin” in the menu on the left side of your screen:

Lead Advantage PRO

4 November 2020
Wednesday 04:54PM

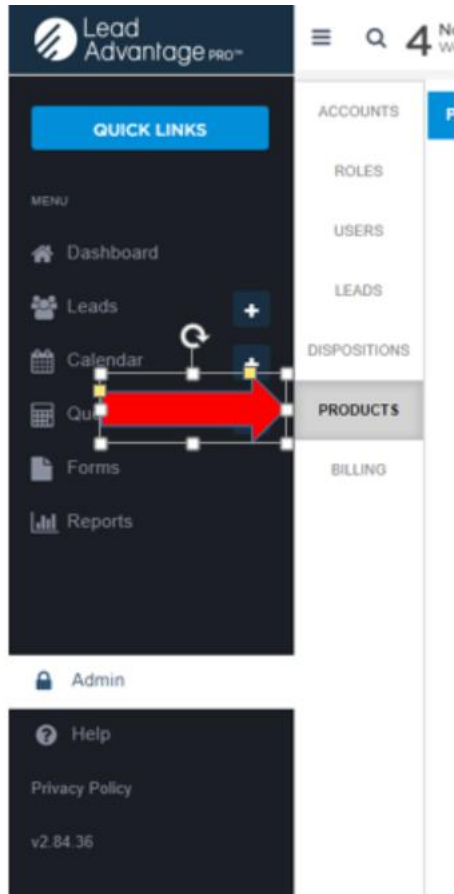
October 1 to Today

5 New Leads

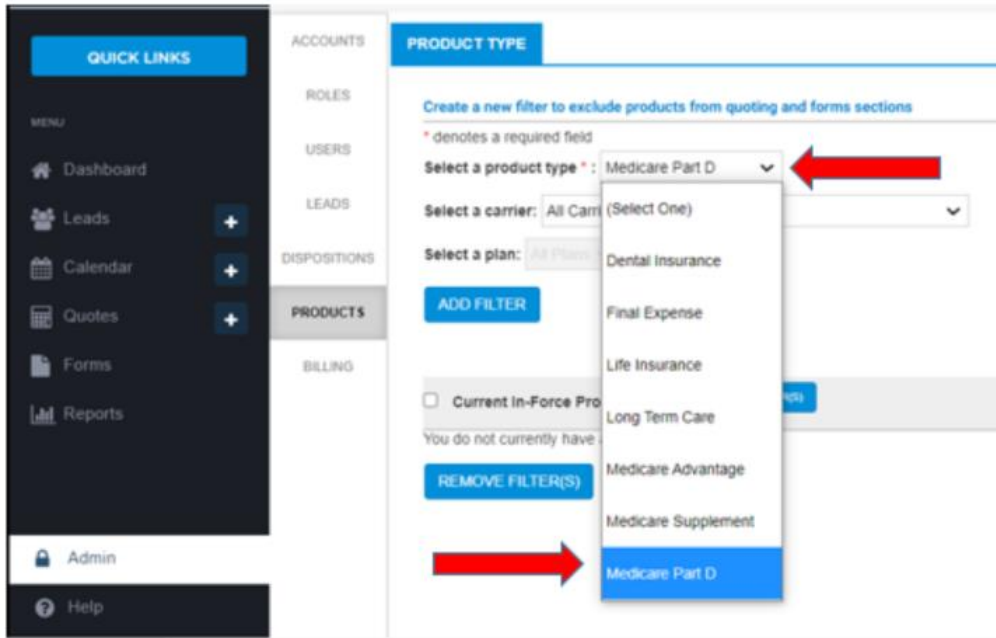
Number of Leads By Disposition

Disposition	Count
Lead	5

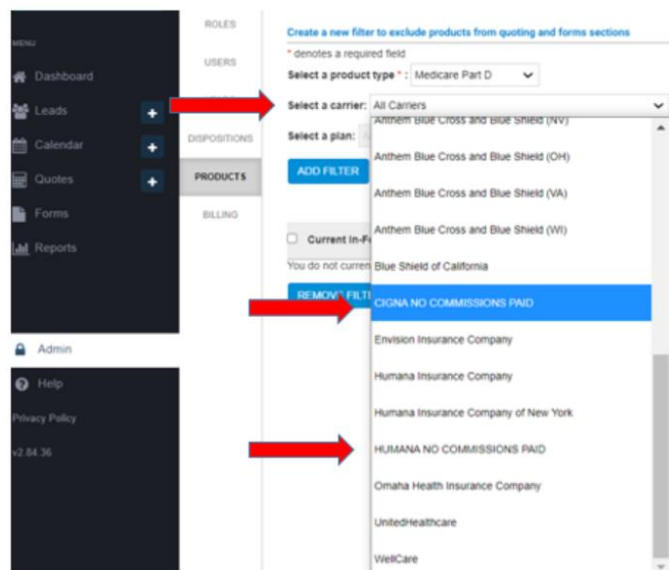
Step 2 – Select “Products” on the next screen:



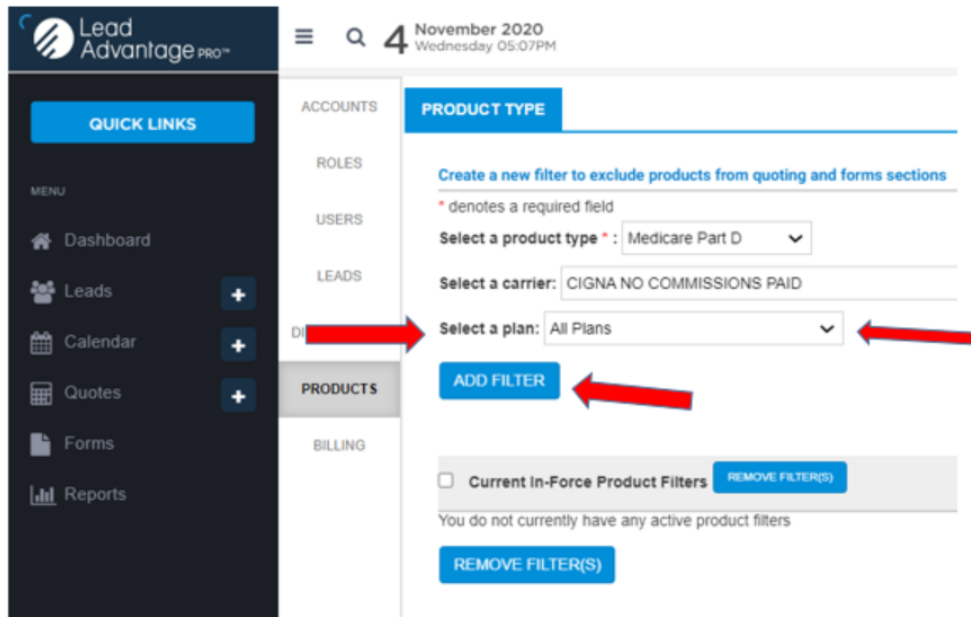
Step 3 – Select the dropdown next to “Select a Product Type”. To remove these two PDPs, you should select “Medicare Part D”. If you would like to filter a different product line, choose that product line:



Step 4 – Select the dropdown next to “Select a Carrier”. To remove these two PDPs, you should select “CIGNA NO COMMISSIONS PAID” or “Humana NO COMMISSIONS PAID” (NOTE: You will have to filter out each plan individually):



Step 5 – Select the dropdown next to “Select a Plan”. If you would like to filter out all plans for the carrier you chose, select “All Plans”. If you want to filter out specific plans for a carrier, you will have to filter the plans individually. For the Non-Commissionable Humana and Cigna Plans, go ahead and select “All Plans”. Select “Add Filter”:



Step 6 – You will begin to see your filtered plans appear in the “Current in-Force product Filters:

