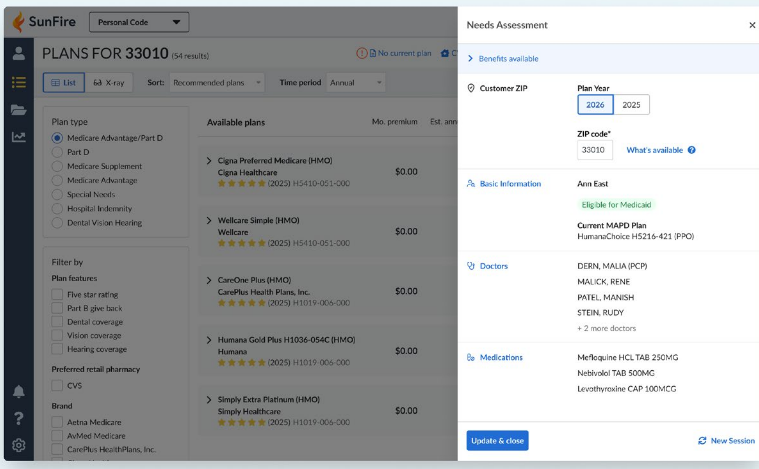
Needs Assessment **Redesign**

We've moved the Needs Assessment to the plans page, making it easier to see how your customer's unique needs affect plan selection.



Plans at-a-glance
Enter a ZIP code and plans automatically load in the background, so you can start exploring options immediately.

Everything in one place
All important customer information (doctors, prescriptions, and more) are now in a single side panel, making it easier to review and update.

Familiar, but faster
The Needs Assessment experience you're used to, in a more streamlined format.

Key Benefits

More flexibility

Choose the order that works best for you – review plans first or gather client information first.

A better big picture

The new summary view makes it easier to see what you've added and what's missing.

Builds client trust

Our customer lookup feature (renamed Basic Information) is now front-and-center, so you can prefill known doctors and prescriptions, get insights on potential eligibility concerns, and show your clients that their needs are understood.

Using Prospect Post?

If you are posting to the current Customer Profile page,
we recommend changing to the Plan Results page once you move to this view.