SOA

Scope of appointment (SOA) forms must be completed 48 hours in advance when practicable.
If the beneficiary expressed interest in a product not agreed to on the original SOA, the agents can complete a second SOA and continue the marketing appointment

What this means for agents: Keep extra SOA forms with you at all times!

Application Submission

Applications must be submitted within 48 hours (preferably 24 hours).

What this means for the agents: Make sure you are sending in your applications every day (weekends and holidays included)! One way to streamline this process is to use the electronic application. Not sure how to get set up? Give us a call (800) 777-9322

Events

All Medicare Advantage and Part D events must be registered with CMS (through the insurance carrier). To stay compliant, make sure you are using carrier approved presentations.

What this means for agents: Events are watched closely by CMS and are "shopped" on a regular basis. Some carriers have started their own surveillance program as well. Treat every event like there is a secret shopper in the crowd.

Clients Calling

Make sure you are telling your clients to call you (the agent) with questions about their plans. This can include (but not limited to): cost, plan details, network quetions, or any other questions they may have.

What this means for agents: A call to 1-800 MEDICARE or to the carrier about their plan may result in a violation. Make sure your clients are calling you first and you are returning their call.

PCP Assignment

Primary care physician (PCP) assignment should be completed on all required applications. Leaving the space blank on an application can result in a carrier violation.

What this means for agents: Make sure you complete the PCP assignment. When in doubt, fill it out. Make sure you are using the online provider directories for the most up-to-date information.

The above is a brief overview.
For more detailed information, give Eldercare Insurance Services a call!

(800) 777-9322
www.eldercarebroker.com