Medicare Advantage Script incoming call from Customer service or call into office

Hi my name is\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ may I have your name please?

How can I help you? \_\_\_\_\_\_\_\_\_\_\_\_ (listen to concern if any)

First Mrs/Mr. \_\_\_\_\_\_\_\_\_\_\_ do you have Medicare? It is a Red/White/Blue Card.

No- What type of insurance do you have? Maybe a good client for Covered CA etc.

Yes- Great do you have both Medicare Part A/B if so you will have a date next to each one on your Medicare Card.

Ok are you currently in a Medicare Advantage Health Plan?( If yes proceed/if no find out if they have straight Medicare or if they have a supplement and if they are happy to figure out if they would be better suited for a supplement plan or Medicare Advantage plan.)

There has been a lot of changes to Medicare and Benefits and this is the time of year to make sure that you are still in the right plan for you.

Can I ask you is there anything you would change about your plan or any benefits you wish your plan had such as more rides to the doctor, over the counter medication, lower prescription costs, better dental coverage etc? (use this info to find the best plan for them.

Do you have Medi-cal (White card/Blue) What is your Medi-cal number so I can see what benefits you qualify for… (check medical eligibility if full Medi-cal special Needs plan medi/medi if share of cost medi-cal regular plan no medi medi plan)

What doctor/specialists do you see? Do you like your doctors or would you like to change doctors?

There are plans called Special needs plans in some areas that are best for people with certain conditions such as diabetes or heart disease. Do you want to look into these plans to see if they may better fit your needs?

IF so, what condition do you have? Diabetes or Heart Disease?

What medications do you take that you would like to check on to see what costs they would be? What do you pay now? (Write this down)

Do you have Low Income Subsidy to help pay for your medications?

NO would you like to see if you may qualify for Low Income Subsidy to reduce the cost of your prescriptions?

If Yes – Are you single or married? Qualification = Single person under $1491.25 income and under $13,640 assets. Couple less than $2011.25 a month in income and $27,500 in assets.

If they qualify you can help them with the application online takes 10 minutes. Ask if they would like to do that? It takes about 3 weeks to get results and it will help them lower their prescription costs /save them money (link on agent center)

Ok based on this information I can check to see what plans will best fit your needs. Can you please hold while I research which plans have the things you are looking for?

DO research on Doctor/prescriptions/ wants/needs to find the best plan and then go over summary of benefits/prescription costs with clients…(please note if client has LIS Generic drugs will be $0-

Once they agree on the plan/answer all questions…

IF Care 1st, SCAN, or Humana, Easy CHoice

Mr/Ms\_\_\_\_\_\_\_\_\_\_\_\_ we just need to fill out a short application and then I need to send it to you for you to sign and send back.

What is the best email address to send it to /do you have an email ?

If not, do you have access to a fax?

If not, I can mail you the packet which you should receive in 1-3 days, you would want to sign it and mail it back ASAP to make sure we can get you started in time, does this work?

Great, we will fill out the application together on the phone … start filling out application

BRAND NEW DAY= Mr/Ms\_\_\_\_\_\_\_\_\_\_\_ we are going to do what is called a telephone application. This is an application that is recorded so that we can capture your voice signature. This should take around 15 minutes and it may seem silly at times but we have to go by the script in order to do this application correctly. Is this ok with you?

Great, your application number is \_\_\_\_\_\_\_\_\_\_ once we do the recording, I will ask you for that number so please write it down.