MEDICARE ADVANTAGE

Enrollment Tips

Ready-Agent™
A PROGRAM BY NEISHLOSS AND FLEMING

NEISHLOSS & FLEMING, LLC
AN INTEGRITY COMPANY

Keep in Mind:

- Filling out an application for a Medicare Advantage Plan may seem easy and mundane, when you have already done 20 in one day.
- Please remember that every single application is as important as the first one you ever filled out.
- Every NEW application should be completed with as much care and time as the one you filled out for your FIRST client.
- Electronic Enrollment can allow for an easier process.

Important Facts:

Here you will find some tips and important things to remember when you fill out a Medicare Advantage application for your clients.

Make sure that all information is complete and accurate. Mistakes and missing information can delay your client's enrollment – keeping them from using the plan they have chosen. Application issues can also delay or impact an agent's commissions.

Can We Read It?

Handwriting

- If the application is hard to read, the carrier representative receiving it may spell something incorrectly as they manually enter the data
- The legibility is even more important when it comes to the Medicare Claim Number of your client and your Agent Writing Number
  - Be sure both are legible and accurate!

Don’t Forget

Always ensure your clients’ important personal information is accurate and legible
These are the most commonly missed items on an application:

- Full name of client
- Full address
- County of residence
  - Determined by where the client’s taxes are paid
  - Where the client lives 6 months and 1 day out of the year
- Gender
- Medicaid ID # - A Special Needs plan, Dual or Chronic, needs to be able to match up with your client’s Medicaid account

More to Remember

Please be sure that there is a **SIGNATURE and VALID DATE** for both client and agent:

- Ex: 10-1-2012 (correct) instead of 10-1-2021 (incorrect)
- All Effective Dates for plan choices are the 1st of the month
- There is a 48 hour time frame for all applications – from the agent's Initial Receipt Date, until the application must be submitted to the carrier for processing.

If there is a POA (Power of Attorney) signing, please include information.
Be sure to answer **ALL** health questions on the application.

Can Your Client Get the Plan?

Please remember to make sure that the plan you are selecting is available in your client's area.

- You can check the Neishloss & Fleming Medicare Quote Engine to determine what is available in each area.
- You MUST be logged into the Neishloss.com website for access to the Medicare Quote Engine.

Pitfalls

Make certain that all pertinent information is correct, legible, and present on the Application

You may encounter some pitfalls when information is missing or incorrect:

- Commissions delayed or not paid at all
- Clients will come across problems at the pharmacy, doctor's office, or specialist's office, such as being told their plan is not active or not found.
- Clients will be contacted about missing or incorrect information, which could cause undue anxiety
- Electronic Enrollments – when available – help prevent mistakes

Unsure?

If you are unsure if an item is a required field or wonder if you are correctly completing a section; feel free to contact us.

800-562-7733

Our Senior Division will be more than happy to walk you through it!