

# PRESCRIPTION DRUG PLANS

## Enrollment Tips



**Ready-Agent**<sup>™</sup>  
A PROGRAM BY NEISHLOSS AND FLEMING

**NEISHLOSS &  
FLEMING, LLC**

AN INTEGRITY COMPANY

## Facts About PDP

- At the end of the day, when you have filled out 20 Prescription Drug Plan (PDP) applications, it may seem second nature.
- 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.

## 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 About

Remember to always include the following items, pertaining to your clients' personal information, that are most commonly missed 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
- Correct Election Period
  - This can also delay the application being approved and delay your commissions.

## Remember These Too

Please be sure that there is a SIGNATURE and DATE for you and your client.

Double check the dates for validity:

- Example: 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 agents' Initial Receipt Date the application must be submitted to the carrier for processing

If there is a POA (Power of Attorney) signing, please include all of their information as well.

Be sure to answer ALL required questions on the application.

## Why Are These Things Important?

Making certain that all pertinent information is correct, legible and included, in a Prescription Drug Plan application, is very important. Some of the pitfalls you may encounter when information is missing or incorrect are:

- Commissions paid slower OR not at all
- Clients will come across problems at the pharmacy, such as being told their plan is not active or not found
- Clients will be contacted about missing or incorrect information, which could upset them or cause undue anxiety

In essence, making sure to follow the simple steps outlined here will save yourself and your client time, effort, and any inconvenience.