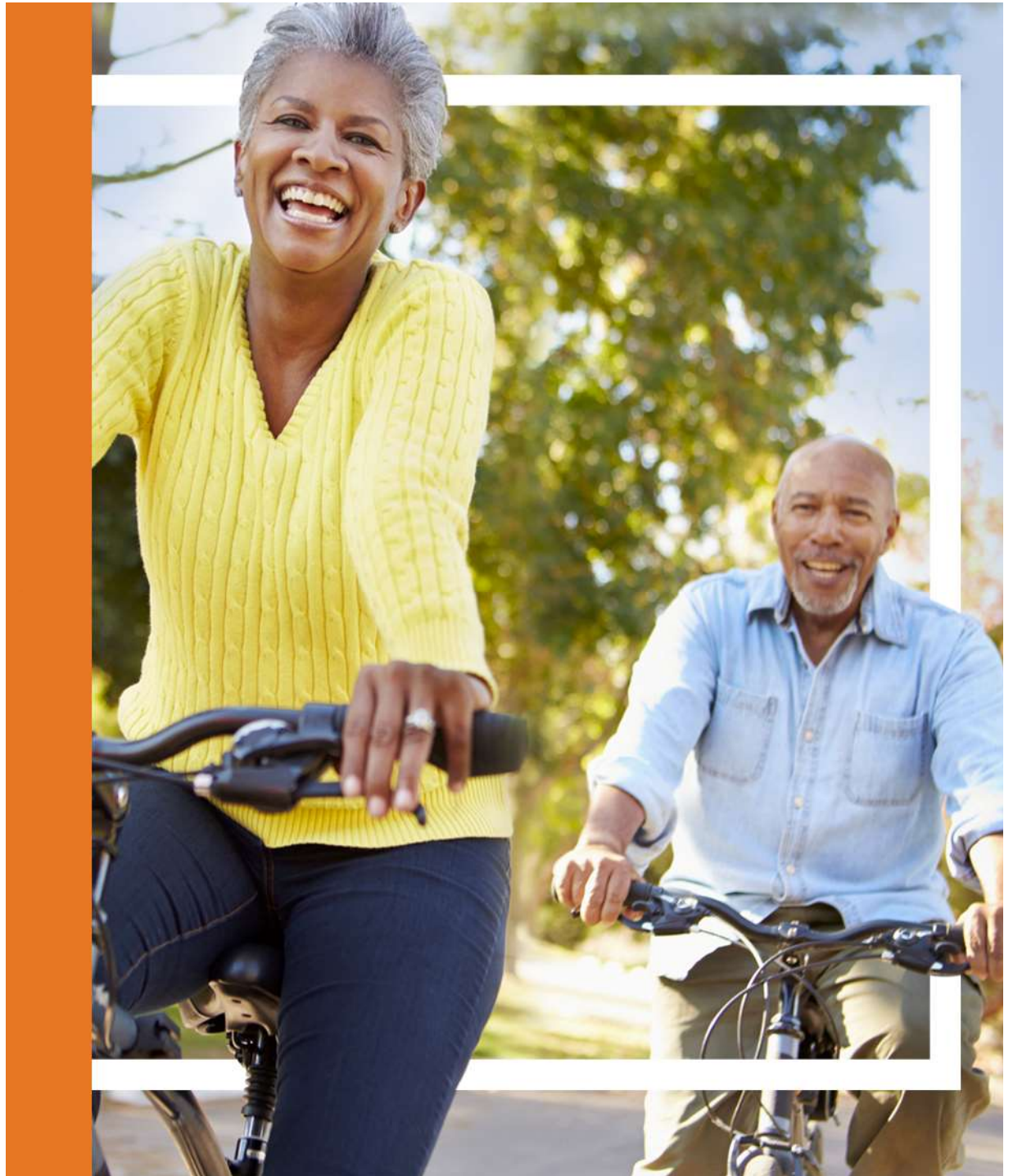


# Telephonic Appointment Process

March 30, 2020

- Guidelines
- Alternative Enrollment Options
- PURL Walkthrough



# Telephonic Appointment Process



## Telephonic MAPD Marketing Presentation

- Due to the current state of COVID-19 as of 3/16/2020, WellCare will allow agents to conduct telephonic MAPD sales appointments with beneficiaries.
- All current CMS Medicare Marketing Guidelines, WellCare policies, etc. must be followed when conducting these telephonic appointments.

## Telephonic MAPD Marketing Presentation: Dos and Don'ts

- After all CMS requirements are met including consent-to-contact and obtaining a SOA, an agent may proceed with a telephonic MAPD marketing presentation by doing the following:
  - Full in-home sales presentation
  - Full benefit review
    - Agents are permitted to email a copy of the SB/ Resource Guide to prospect or direct them to the SB on the public WellCare website
  - As appropriate, call SPOP for dual eligibility verification
  - Full review and check on drugs and doctors
  - Answer all plan and benefit related questions
- If the beneficiary agrees to enroll, the agent MAY NOT conduct telephonic enrollments on behalf of the beneficiary

# Alternative Enrollment Options



- If the beneficiary agrees to enroll, the agent MAY:
  - Provide PURL information to the prospect- \*not an option for dual eligibles\*
    - More to follow
  - Send pre-filled paper application to be completed by the beneficiary
    - Explain to beneficiary that you will be mailing them a pre-filled application along with a stamped, return envelope (addressed back to agent)
      - Beneficiary should sign & date the application and
      - Use the provided envelope to return the application to the agent
    - Call the beneficiary in a day or two to confirm receipt and remind them to sign, date & send the application back as soon as possible
    - Once agent receives the application in the mail, the agent MUST:
      1. Fax completed MAPD app/ SOA to 1-866-473-9124 OR
      2. Attach completed MAPD app/ SOA as PDF to a ticket in Agent Connect
      3. Store app in a HIPAA compliant manner

Move to  
PURL training slides

- Any additional questions?

## TAM District Sales Managers

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