

Medicare Enrollment Process

From Anxiety to Action



- Guide your client with confidence
- Start to finish execution
- Zero guesswork



Scope of Appointment

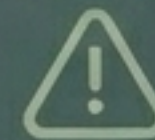
Required before submission

Must be signed before the appointment

Documents approved discussion topics

Electronic or email delivery preferred

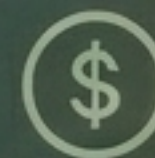
The Cost of a Missing SOA



Reversed client
enrollment



Permanent
compliance issue



Lost revenue

Your Enrollment Platform



Quote, compare, and enroll in one place

Faster submission processing

Fewer application errors

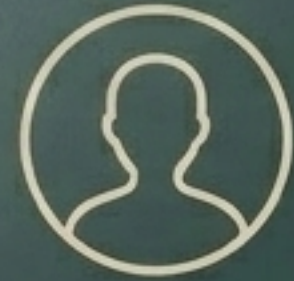
Multi-carrier access

Step 1

Step 2

Application Setup

- Locate Plan
- Log into portal and pull up selected coverage



Verify Data

- Input name, date of birth, and Medicare number

Step 3



Plan Review

Confirm Plan Details

Monthly premium

Out-of-pocket costs

Network rules

Pharmacy coverage

CMS Requirement: Client must confirm understanding

Step 4



Scripted Disclaimers

Read Exactly As Written

- Do not skip
- Do not paraphrase
- Follow platform prompts

Step 5



Finalizing the App

Client Consent

Electronic checkbox or
recorded verbal confirmation

Step 6



Submit

Transmit application
securely to carrier

Processing & Confirmation



Carrier processing takes a few business days



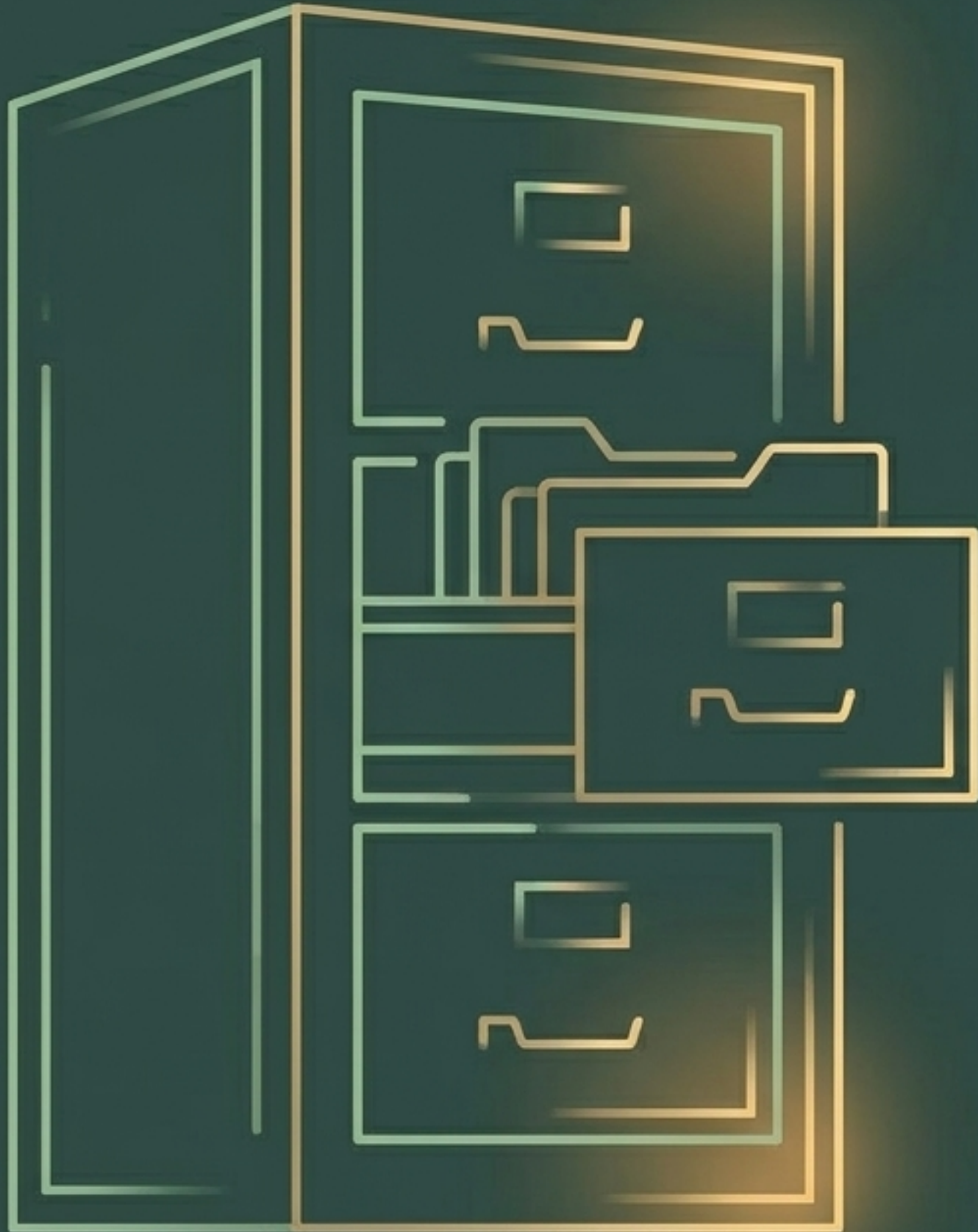
Client receives physical confirmation letter



Coverage activates on agreed effective date



Agent receives portal or email verification



Required Record Keeping

- ✓ Scope of Appointment
- ✓ Enrollment confirmation
- ✓ Appointment notes

Store securely per client to protect against future inquiries

The Pended Application

The Issue

Notification of rejection or pended status

The Cause

Data mismatch with Medicare card or missing data

The Fix

Check portal, correct the error, and resubmit



Run a Test Scenario

1. Log into your enrollment platform
2. Locate the test application feature
3. Walk through to the final submit button

