

checklist

FOR CALL RECORDED ENROLLMENT

Medicare Advantage (MA) Agent Checklist

Introduction

- State first name, last name, and "Licensed Insurance Agent"
- Disclose call recording (if applicable)
- TPMO disclaimer (must be stated within first minute of sales call)
- SOA must be completed as applicable

Baseline Benefits

- Plan premium
- Part B premium reduction (if applicable)
- Medical deductible
- Maximum out-of-pocket (MOOP)
- Inpatient hospital copay/coinsurance
- Outpatient hospital care
- PCP copay/coinsurance
- Specialist copay/coinsurance
- Preventive care
- Emergency room
- Urgently needed services

Prescriptions

- Offer Rx lookup
- Prescription deductible & medication tiers
- Formulary coverage (if meds provided)
- Copay/coinsurance for selected pharmacy (if meds provided)
- Clinical edits (QL, ST, PA, etc.) if applicable
- Explanation of drug coverage stages (if included in SOB)

Providers

- Offer provider lookup
- PCP network status
- Facility network status (including pharmacy)
- Confirm location
- Referral requirement (if applicable)

Miscellaneous

- Star Ratings disclosed
- Pre-Enrollment checklist reviewed

Note: Agents must review both in-network and out-of-network costs for PPO plans

Disclaimer: This checklist is for quick reference purposes and is not all-inclusive