Medi careful®

MEDICAREFUL SALES PROCESS

This is a step-by-step process for completing an application using the Medicareful tool in a non–face-to-face setting. All applications and Scopes of Appointment submitted via Medicareful must be completed by the beneficiary. Under no circumstances can an agent key a Scope of Appointment or application on behalf of a beneficiary. All applications require a Scope of Appointment. The appropriate plan presentation must be done telephonically for the beneficiary.

More information can be found on the Medicareful User Guide.

If you have any questions, please email us at support@medicareful.com.

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1 **Get your client on the phone.**

You can call your existing clients directly. Any new clients or prospects need to call you first. You cannot make cold calls to market Medicare Advantage or prescription drug plans.

2 **Send your client the Scope of Appointment link.**

The Scope of Appointment link will always be: **https://medicareful.com/yourslug/contact**, with **yourslug** being replaced with your agent slug. For a template of this email, please view the Docs site.

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3 Walk your client through the Scope of Appointment.

The client will need to type in their first name, last name, phone number, and zip code. Other fields are optional. They will need to select the product types they are interested in. (They are prechecked, and we recommend leaving them that way). Finally, they need to sign their name by typing their first and last name *in both* signature fields. The signatures must be identical.

4 Sign the SOA as the agent.

Log in to App.RitterIM.com. Navigate to the CRM by clicking on the **Clients** tab on the left-hand side of the screen. Find the client in your list of clients. Click the **Edit Client** button (looks like a pencil and paper, third button from the left). On the subsequent screen, click the **eScopes** tab across the top. Click **Sign Scope** on the right. Enter the appointment date, along with the plans presented, and click **Sign eScope**.

5 Do a benefits analysis, confirm providers and prescriptions are covered, and do the plan presentation.

Do the normal sales process, except over the phone instead of in person. If there are any PowerPoint presentations or flip charts that the carrier requires you to use, make sure you cover all information contained in those with the beneficiary. Use the plan sites to confirm provider and prescription coverage.

6 Send your client the enrollment link.

The enrollment link will be unique for each plan and zip code, so a new one will need to be generated for each email that you send. To generate the link, click on either **Email Plan** or **Copy Link** on the appropriate plan card. For a template of this email, please view the Docs site.

7 Walk your client through the application.

Walk your client through each question on the application, having them type in the appropriate information. We suggest having the same application up on your computer so you can easily follow along. Confirm that the client is enrolling in the correct plan and have them hit submit. All required documents will be linked and available for the client at the end of the application.

8 Confirm application submission.

Upon submission of the application, you will receive a confirmation email. You can confirm the application was sent to the carrier by viewing your clients on the **Submissions** tab on App.RitterIM.com.