

UPMC *for Life* telephonic enrollment

Telephonic enrollment can be done as soon as the plan review is completed and your client is ready to enroll. **You are not permitted to complete a telephonic enrollment.**

All telephonic enrollments must take place on an inbound recorded call. If using this option, advise your client to hang up with you and call **1-866-400-5067** so they can complete the telephonic enrollment with a UPMC *for Life* representative.

Before you end the call, you need to add the note below to your lead in Cavulus so your client can be enrolled in the correct plan. Be sure to let your client know to tell the representative they have been working with you:

For Medicare enrollments: Final TE note: ON BEHALF OF <agent name>. <Beneficiary Name> requesting enrollment in <Plan Name and premium>, effective <mm/dd/yyyy>, Enrollment Period—<List Enrollment Period>, Medicare Claim Number—<List MBI number>, PCP—<list practice name and number>, Bill—<list option>. Current company—<Company name>. Current Plan—<plan name>. Beneficiary will be <completing enrollment online or calling to enroll.>

For SNP Enrollments: Final TE Note: ON BEHALF OF <agent name>. <Beneficiary Name> requesting enrollment in DUAL/SNP, effective <mm/dd/yyyy>, Enrollment Period—<List Enrollment Period>, Medicaid # <list number>, Medicare Claim Number—<List MBI number>, PCP—<list practice name and number>, Bill—<list option>. Current company—<Company name>. Current plan—<plan name>. Beneficiary will be <completing enrollment online or calling to enroll.>

Please make sure your client knows to contact you directly with any additional questions.

UPMC *for Life*
UPMC Health Plan Medicare Program