

1. Open your client's lead record in Cavulus. Make sure that your client's lead record is assigned to you. To send a Plan Change Form, click on **Send Email**:

[Permission To Contact](#) | [Set Future Eligibility Date](#) | [Enrollment Form](#) | [Quick Form](#) | [Seminar Reservation](#) Appointment: **Thursday, October 15, 2020 at 12:00 AM**  | [Edit Appointment](#) | [Set Follow-Up](#) | [Send Email](#)

Sales Status: Appointment 

Note:  

Literature: Select A Region
Allegheny (2021) 

Select A Lit Kit

- Allegheny**
- 2021 Allegheny Beaver Bedford Blair Butler Somerset Washington PA MA Kit
- 2021 Allegheny Beaver Bedford Blair Butler Somerset Washington PA Plan Compare
- 2021 Western and Central PA Complete Care Enrollment Kit
- Enrollment Decline
- Enrollment Thank You
- MC Part B App Kit
- Outside Service Area

Send Lit

2. Click **Send Link To Plan Change Form:**

[Permission To Contact](#) | [Set Future Eligibility Date](#) | [Enrollment Form](#) | [Quick Form](#) | [Seminar Reservation](#) Appointment: **Thursday, October 15, 2020 at 12:00 AM**  | [Edit Appointment](#) | [Set Follow-Up](#) | [Send Email](#)

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- Allegheny
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- Plan Change Form

Send Lit

Send Email 

SEND LINK TO SOA FORM

SEND LINK TO ENROLLMENT FORM

SEND LINK TO PLAN CHANGE FORM

CLOSE REVIEW SEND



3. Populate your information. If there is no email address is on the lead, you will need to enter one. If an email address is populated in lead, it will be automatically pulled over. You will also need to select the **Plan Name** and **Plan Premium** that the beneficiary will be switching to. **Please make sure you are selecting the new plan, and not the plan they are currently enrolled in.**

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Send Link To Plan Change Form

Agent Full Name: Michael Kirkwood

Agent Phone Number: 412-454-8549

Agent Email Address: kirkwoodme@upmc.edu

To Email Address: TYLERCA@UPMC.EDU

Update Email Address on Lead?

Plan Name: \$40 - HMO Choice Rx (HMO) 2020

Plan Premium: \$ 40

CLOSE PREVIEW SEND

r - UPMC Health Plan

4. Click **Preview** to view the email that will be sent.

5. Preview of email that will be sent. Click the **Send** button to send the email to the beneficiary.

Preview Email

Dear Claudia Tyler:

Thank you for continuing to choose UPMC *for Life*. You are receiving this email because you wanted to switch your current plan and enroll in the UPMC *for Life* \$40 - HMO Choice Rx (HMO) 2020. You're eligible to apply for enrollment in **\$40 - HMO Choice Rx (HMO) 2020 plan with a monthly premium of \$40**. Complete your plan change application by clicking the "**Click for Plan Change Application**" button below.

[Click for Plan Change Application](#)

To complete the plan change process, follow these steps:

- Complete all information in each section of the application.
- Electronically sign the application by typing your first and last name into the digital signature field. Remember to also fill in the date field.
- Make sure to click **Submit** to process your plan change application.
- Once your plan change application is submitted, you will receive a confirmation number. Please save your confirmation number for future reference.
- After CMS has confirmed your enrollment in your new plan, you will receive a confirmation letter with your member ID number and additional information. If you are changing your plan during the Annual Election Period (October 15 to December 7), you will receive your new member ID before January 1. If you are changing your plan outside of the Annual Election Period, you will receive your new member ID card within 7 to 10 days of your enrollment being confirmed.

If you have any questions, please feel free to contact me at the phone number below. Thank you for enrolling in UPMC *for Life*.

Sincerely,

Michael Kirkwood
Authorized UPMC *for Life* agent
Direct: **(412) 454-8549**
Hours: Monday through Friday from 8 a.m. to 5 p.m.
Email: kirkwoodme@upmc.edu

www.upmchealthplan.com/medicare

CANCEL **SEND**

6. After sending, you will be able to view what has been sent under the **Communication History** tab.

7. Once the beneficiary completes the application, this will be viewable under **Application History** tab.