

Agent appointment checklist

Agent:

Name of person visited:

Introduction

☐ Name/card

☐ Company name

Getting started

☐ Geisinger Health Plan is an HMO and PPO Plan with a Medicare contract

☐ Members must pay Medicare Premium

☐ Members must reside in the service area

☐ LEP explanation

☐ Members must have Medicare Part A & B

Summary of benefits

☐ PCP copay

☐ Hospital copay

☐ Specialist copay

☐ Other copays

Other benefits

☐ Silver&Fit®

☐ Vision

☐ Dental

☐ OTC

HMO and PPO

☐ In network

☐ Out of network

Medicare Part D prescriptions

☐ Copays

☐ Coverage gap

☐ Formulary

☐ TROOP

☐ Initial coverage limit

☐ Mail order

Compliance items for SNP prospects (All of the above, plus:)

☐ Explain SNP eligibility requirements

☐ Copays

☐ Explain any changes in eligibility may lead to disenrollment

☐ Explain the cost-sharing for covered drugs

☐ Explain that Secure members will have \$0 cost sharing for all medical benefits, but they may see nominal Medicaid copays depending on their level of Medical Assistance

Enrollment kit

☐ Plan ratings

☐ Summary of Benefits

☐ Multilanguage Insert

☐ Enrollment form

Keep this checklist along with your signed Scope of Appointment.

Confidential; for agent use only. Not for distribution to Medicare beneficiaries. Effective July 2023.

Effect on Current Coverage. If you are currently enrolled in a Medicare Advantage plan, your current Medicare Advantage healthcare coverage will end once your new Medicare Advantage coverage starts. If you have Tricare, your coverage may be affected once your new Medicare Advantage coverage starts. Please contact Tricare for more information. If you have a Medigap plan, once your Medicare Advantage coverage starts, you may want to drop your Medigap policy because you will be paying for coverage you cannot use.