



## Outbound enrollment and verification (OEV) call checklist

After walking you through the enrollment kit, your sales agent will use the checklist on the next page to help make sure you understand Medicare Advantage plans.

After you've submitted the enrollment request, you'll receive a call within 15 days from DSS Research, a trusted outside vendor authorized by UnitedHealthcare. During this call, a representative from DSS Research will help make sure the Medicare Advantages plan was explained to you clearly and thoroughly, and will verify your intent to enroll in the plan before you actually enroll. The representative will also help you understand the 7-day cancellation language that's required by Medicare. The verification call may not follow this checklist exactly, but it may be helpful to have it on hand for the call.

This call is required by Medicare. It will not affect your ability to enroll in the plan. Your sales agent will not be on this call. To confirm your identity and protect your privacy, the representative will need your date of birth.

If you are not home to take the call, DSS Research will mail you an enrollment verification letter.

## Outbound enrollment and verification (OEV) call checklist (cont.)

<b>For all plans:</b>		
Did the sales agent explain that you would be receiving a call to verify your enrollment?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Do you understand you have applied for a Medicare Advantage plan?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Do you understand that to enroll you must have Medicare Parts A and B?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Did the sales agent fully explain your premium, deductible, benefits, copays and coinsurances?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Did the sales agent make sure that your doctor is in the network?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Did the sales agent show you the Summary of Benefits (SB) inside this booklet?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Did the sales agent give you their contact information (name, phone or business card)?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Did the sales agent give you the receipt from the enrollment form?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
<b>Only for PFFS plans:</b>		
Did the sales agent ask if you get both Medicare and Medicaid benefits? Did they explain that PFFS plans may not always be a good choice for people with Medicare and Medicaid?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Did the sales agent fully explain to you what "deeming" means?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
<b>Only for Dual SNP plans:</b>		
Did the sales agent tell you that your enrollment form will not be processed until your Medicaid status is confirmed?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
<b>Only for Chronic plans:</b>		
Did the sales agent tell you that your enrollment form will not be processed until your chronic illness has been confirmed, which may take up to 21 days?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
<b>Only for HMO, HMO-POS and PPO plans:</b>		
Do you understand you must use in-network health care providers to get the in-network benefits, copays and coinsurances?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Do you understand that if you use out-of-network health care providers you will likely pay higher out-of-pocket costs?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
<b>Only for Medicare Advantage plans including prescription drug coverage:</b>		
Did the sales agent explain the plan's drug list and drug tiers?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Did the sales agent explain the coverage gap, sometimes called the doughnut hole?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Do you understand that in most situations you must use a UnitedHealthcare network pharmacy?	<input type="checkbox"/> Yes	<input type="checkbox"/> No