Individual Sales Presentation Checklist

Beneficiary Name

SALES AGENT INFORMATION

- [ ] Be on time
- [ ] Introduce yourself by name & company
- [ ] Annouce product types to be discussed BEFORE beginning presentation
- [ ] State that you do not work for Medicare or the government and make it clear that you represent Medicare Advantage & Medicare Supplement carriers

GENERAL APPOINTMENT INFORMATION

- [ ] Present Scope of Appointment (if not previously obtained) BEFORE the presentation is made

GENERAL PLAN INFORMATION

- [ ] Explain eligibility requirements
- [ ] Explain enrollment & disenrollment periods
- [ ] Explain plan premiums
- [ ] Explain co-payments
- [ ] Explain co-insurance rates
- [ ] Explain how plan will affect Medicare benefits & use of Medicare card
- [ ] Explain how the network works
- [ ] Explain late enrollment penalty
- [ ] Cover all benefits on the summary of benefits

RX COVERAGE

- [ ] Explain prescription drug coverage
- [ ] Explain how & where to find out if prescription drugs are covered
- [ ] Explain the "donut hole"
- [ ] Discuss the prescription drug discount program that is available to beneficiaries entering the prescription drug coverage gap

I have discussed and reviewed all of the above topics at my presentation today.

Agent Name

Agent Signature

Date

102601P