

# Broker Telephonic Enrollment

## Step-by-step process to complete an enrollment

### *Quick Tips*

Independence Blue Cross (Independence) is relaunching the broker enrollment process to agents to have a beneficiary enroll into a Medicare Advantage or Medigap plan telephonically through the: **Medicare Enrollment line 866-950-2142, available Monday through Friday between the hours of 8:30am and 5:00pm.**

#### Steps to follow:

- **SOA's** - It is your responsibility as the agent to obtain an appropriate SOA either through traditional methods and ensuring it is made available upon request or using the BMRC for a telephonic SOA.
- As the agent, you are responsible to explain the enrollment process to the beneficiary as well as answer all of their questions prior to having the beneficiary call the Medicare Enrollment Line.
- As the agent, you should provide the beneficiary with the phone number to the Medicare Enrollment line 866-950-2142 making sure they have all information required to complete the enrollment.

Your beneficiary may call the Independence Medicare Enrollment line between **8:30am and 5:00pm Monday through Friday**, but you must make sure they have the following information:

- √ Medicare Card (A & B dates / MBI)
- √ Mention the applicable enrollment period/special enrollment period (SEP). Example: IEP, ICEP, AEP, MA OEP, OEPI and SEPs.
- √ Full name of the Plan they are enrolling in (KS65 Rx HMO, PC65 Prime RX PPO, or Medigap Plan)
- √ Premium of the plan they are enrolling in
- √ PCP provider number (Required for KS65 HMO plans)
- √ Effective Date of the plan
- √ Your (broker) Name, **NPN and FMO Name and Number**



### Important Notes

If the beneficiary should ask a question regarding plan detail, network, formulary, etc. the enrollment will not be completed. They will be directed back to you for further servicing.

***The telephonic enroller reps are not licensed agents and may not answer any questions as it would not be compliant with CMS rules and guidance.***

Per Medicare Guidance, the enroller rep may not start a telephonic enrollment from an outbound call to the beneficiary.

**This means that in every instance, the beneficiary will need to call into the telephonic enrollment line.**

For agent use only.