

Agent Alert



April 9, 2020

Agent reference tool: Interim COVID-19 enrollment options

Our top priority is ensuring the health and safety of our agents and members. Below are questions we have received from you about enrollment options for Medicare beneficiaries during COVID-19 stay-at-home orders and social distancing recommendations.

Q: How can I enroll a beneficiary if they are unable to meet face-to-face?

A: The Centers for Medicare & Medicaid Services (CMS) has not released modified sales and marketing guidance as it pertains to COVID-19. You must continue to conduct business within currently defined business processes. Agents are not allowed to conduct telephonic enrollments. The following enrollment options may be used.

Online enrollment by enrollee

Beneficiaries may enroll online at **YourMedicareSolutions.com**. The following screenshot is enrollment step 5 and includes fields for the enrollee to add you as the assisting agent. Provide enrollees your:

- First name
- Last name
- Agent number
- Agency number (if applicable)
- Phone number

MedicareBlue Rx (PDP)
A Medicare Prescription Drug Plan

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I understand that by typing my name below on this application means that I have read and understand the contents of this application, including the enrollment authorization information in Step 5.

If this is submitted by an individual who is the authorized representative of the enrollee and authorized to act on his/her behalf under the laws of the State where the enrollee lives, this signature certifies that

1. this person is authorized under State law to complete this enrollment and
2. documentation of this authority is available upon request by Medicare.

Today's date
04/03/2020

Enrollee first name* Jane
Enrollee last name* Doe

I am the enrollee
 I am the enrollee's authorized representative
 I assisted the enrollee in filling out the form
 I am the enrollee's agent

If you were assisted by an agent, please fill in information if known

Agent first name
Agent last name
Agent number
Agency number
Agent phone number

Note: To enroll an applicant online, you must have their permission. Forms should be submitted within 2 calendar days of the date you receive the complete form.

Previous Page Continue to Step 6

For agent use only. Not for use with the public.

Paper-to-online submission

A beneficiary may mail, fax or email (if you are using a secure email method) a completed application which you can enter in the enrollment form on **YourMedicareSolutions.com**. Select the paper-to-online option. The enrollee must have selected this option on the paper enrollment form.

- Enter your agent ID and agency codes (if applicable) to receive credit for the enrollment
- Do not sign or date the application until you are ready to submit
- Submit enrollment forms within 2 calendar days (this ensures your client gets their acknowledgement letter within 7 calendar days)

Direct paper to plan by enrollee

The enrollee may complete a paper enrollment form and fax it to **1-855-874-4702** or mail it to the address on the enrollment form. Fillable PDF enrollment forms are available [online](#).

- Your agent ID and agency codes (if applicable) may be given to the enrollee to enter on the enrollment form
- If you send a prefilled paper application to a beneficiary, you may enter your agent ID and agency codes, but do not sign or date it. The enrollee may submit the application directly to the plan.

The Centers for Disease Control and Prevention (CDC), the World Health Organization (WHO) and the Surgeon General have indicated that there is currently no evidence that COVID-19 is being spread through the mail.

Q: Am I required to complete a scope of appointment (SOA) form if I don't have a face-to-face meeting with a beneficiary?

A: Yes. CMS states an SOA form must be documented for all marketing activities in person or telephonically. A signed SOA form can be sent via fax, email or mail. Agents are responsible for maintaining sufficient evidence to demonstrate beneficiary receipt and approval.

- For the SOA form only, we will permit electronic signatures from trusted vendors, such as DocuSign or AdobeSign. The electronic signatures must have a transaction ID on them to be considered valid.

Questions? Call a Broker Help Desk

If you have questions, want to enroll an applicant by phone or help a member make a change, please contact the appropriate agent help line:

- MedicareBlue Rx pre-enrollment toll free at **1-866-464-3919**
- MedicareBlue Rx post-enrollment toll free at **1-866-849-2498**

Coverage is available to residents of the service area or members of an employer or union group and separately issued by one of the following plans: Wellmark Blue Cross and Blue Shield of Iowa,* Blue Cross and Blue Shield of Minnesota,* Blue Cross and Blue Shield of Montana,* Blue Cross and Blue Shield of Nebraska,* Blue Cross Blue Shield of North Dakota,* Wellmark Blue Cross and Blue Shield of South Dakota,* and Blue Cross Blue Shield of Wyoming.*

*Independent licensees of the Blue Cross and Blue Shield Association.