My name is (Agent Name) and I am giving you a call from HEALTH CARE MANAGEMENT and today my job is to qualify you for additional Medicare Benefits.

## **1.** So I believe you are a Medicare holder & you have part A & B correct?

## **(Need Affirmation)**

That’s great, so you are qualified to get upgraded 2024 Medicare benefits.

**So which benefit are you most interested in?**

a. Getting Dental vision hearing coverage

b. Reducing premiums & co-pays up to $0

c. Reducing prescription cost

d. OR extra benefits like money back on part B premium up to $148, transportation services, coverage for over-the-counter items

**(Identify what customer needs & accordingly inform them to ask the same to LA)**

2. And, I believe you are authorized to make decisions for your Medicare, right?( **If Yes: Continue)**

**If No:** Ask who the power of attorney is: if power of attorney is available talk to them and transfer.

**(**If power of attorney is not available - **do not transfer the call**)

**3.** **Have you enrolled in any healthcare plans within the last 1 month..??**

**(If yes – Close the call)**

**4.** **You reside in the state of \_\_\_\_\_\_\_\_\_with a zip code of \_\_\_\_\_\_, right? Can you please confirm your mailing address?**

**Call back Consent**: Now your phone number is\_\_\_\_\_\_\_\_\_\_.? In case the call gets disconnected you give us the permission to call you back right**? Capture customer affirmation as YES**

**5.** **Also,** your DOB is \_\_\_\_\_\_\_. **Correct (Confirm DOB)**

6. **And I see your name is \_\_\_\_\_\_\_\_right? (Confirm Name)**

**Final Step:**

Great! That’s all I need, I will really appreciate it if you stay back on the call for next 10 minutes and talk to my license agent to get all the Additional Benefits. Ok? (Get the affirmation from customer for call duration)

**So I believe you understand this call is to provide you additional Medicare benefits right?** (**Take affirmation)**

Before I transfer, let me read a small statement which is just a call back authorization.

## **Read TCPA as mentioned below: TCPA (The Telephone Consumer Protection Act):**

**By speaking to our live representative you agree to our privacy policy, authorize us and the insurance service providers to contact you even if you are on a DNC list, you don’t have to provide your consent as a condition of service.** (Need to get an OK/Yes from the customer)

**"Do you have any questions for me before I transfer the call”?** (**Take affirmation)**

Once I connect your call, they will ask if you**: How Can I help you? Tell them you need additional Medicare benefits.**

**Also they will ask you your basic details like Name, DOB, address etc so please provide them to get all the upgraded benefits.**

**“Thank you, I am now placing that call for you. You may hear some brief music; however, a representative will be on the line shortly to assist you.”**

Kindly hold the line