



MEDICARE SUPPLEMENT APPLICATION TIPS

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November 16, 2011

HELPFUL TIPS:

The following are a few helpful tips to assure your Medicare supplement applications are complete and processed quickly.

1. As of **November 14, 2011** only the new paper application that was released in August is being accepted for new business. The new paper application can easily be identified by the bar code, which appears on each page.
2. In Section K "To Be Completed by Producer", it is important to answer all three questions below (check boxes).

K. To be Completed by Producer

19. Producers shall list any other health insurance policies/certificates they have sold to the applicant.
(a) List policies/certificates sold to the applicant which are still in force.

Applicant A
Applicant B

(b) List policies/certificates sold to the applicant in the past five (5) years which are no longer in force.

Applicant A
Applicant B

Answer all 3 questions

I/We certify as follows:

I/We have provided a copy of the replacement notice if the applicant is replacing coverage..... Y N

I/We have accurately recorded in the application the information supplied by the applicant..... Y N

I/We certify that we have interviewed the proposed applicant..... Y N

If you answered "NO" to any of the above statements, please explain why.

* If not replacing coverage, mark "N" above and indicate so here.

Signature of Licensed Producer _____ Date _____ Signature of Licensed Producer _____ Date _____

3. For dual applications, fill in the address of the Applicant B and make sure to answer all questions as they apply to Applicant B including all dates.
4. It is required that the producer and applicant(s) **sign and date** the Replacement form.
5. On the Agreement and Authorization page please make sure your client completes all information associated with the signature line: city, state, date and signature.
6. If splitting commissions, you must fill out the Producer Information page indicating such in order to be paid correctly.

QUESTIONS:

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