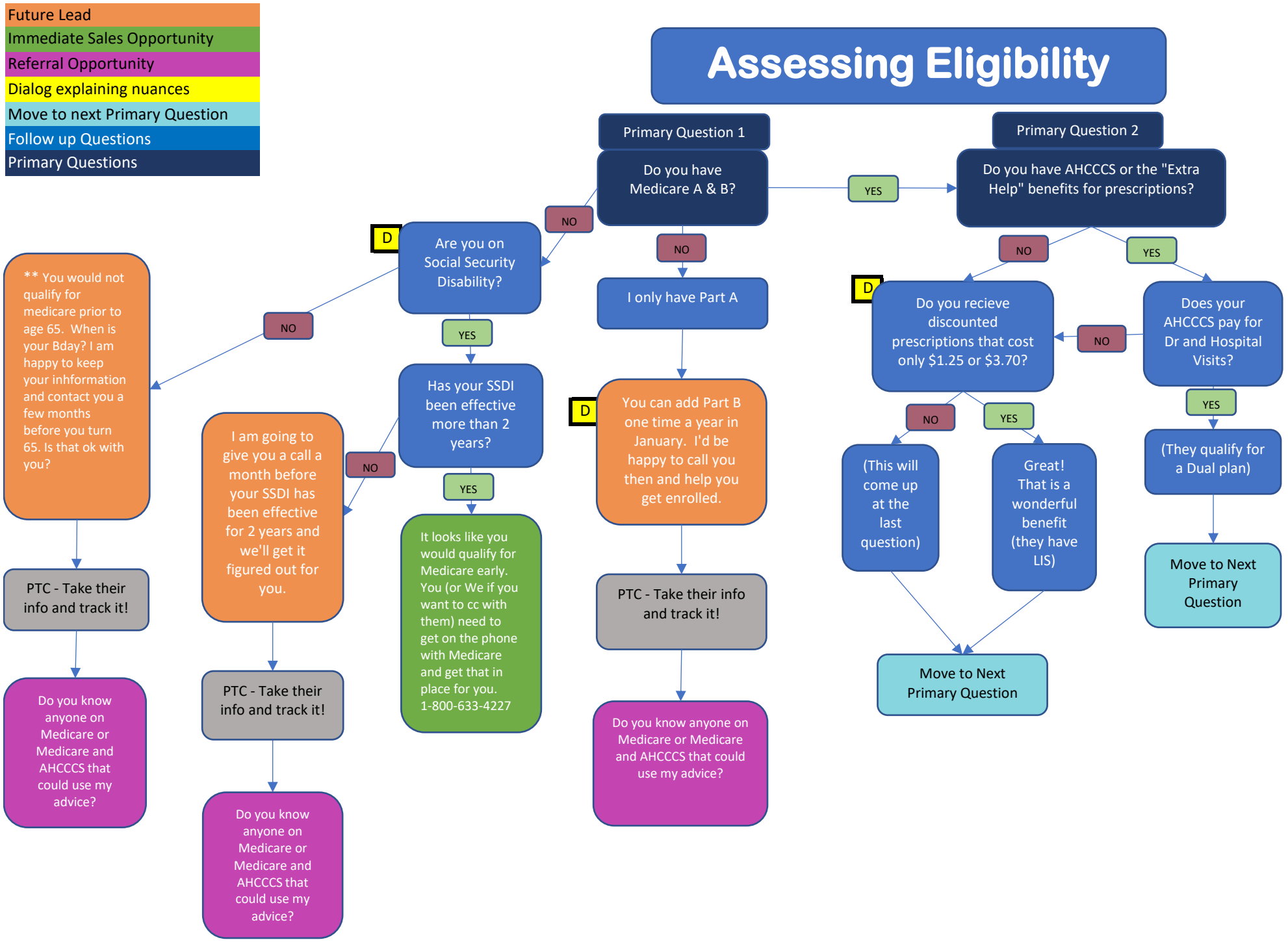
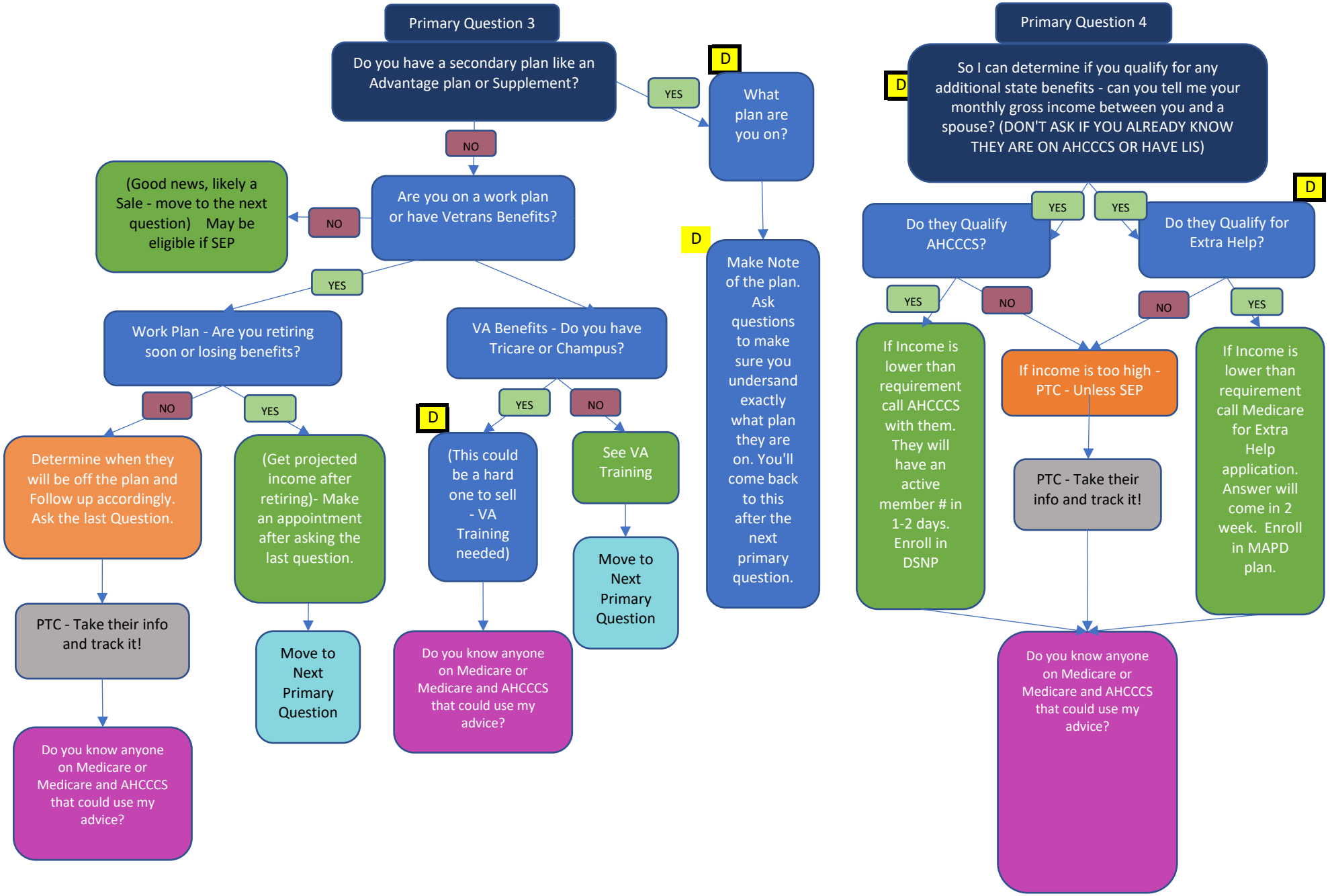
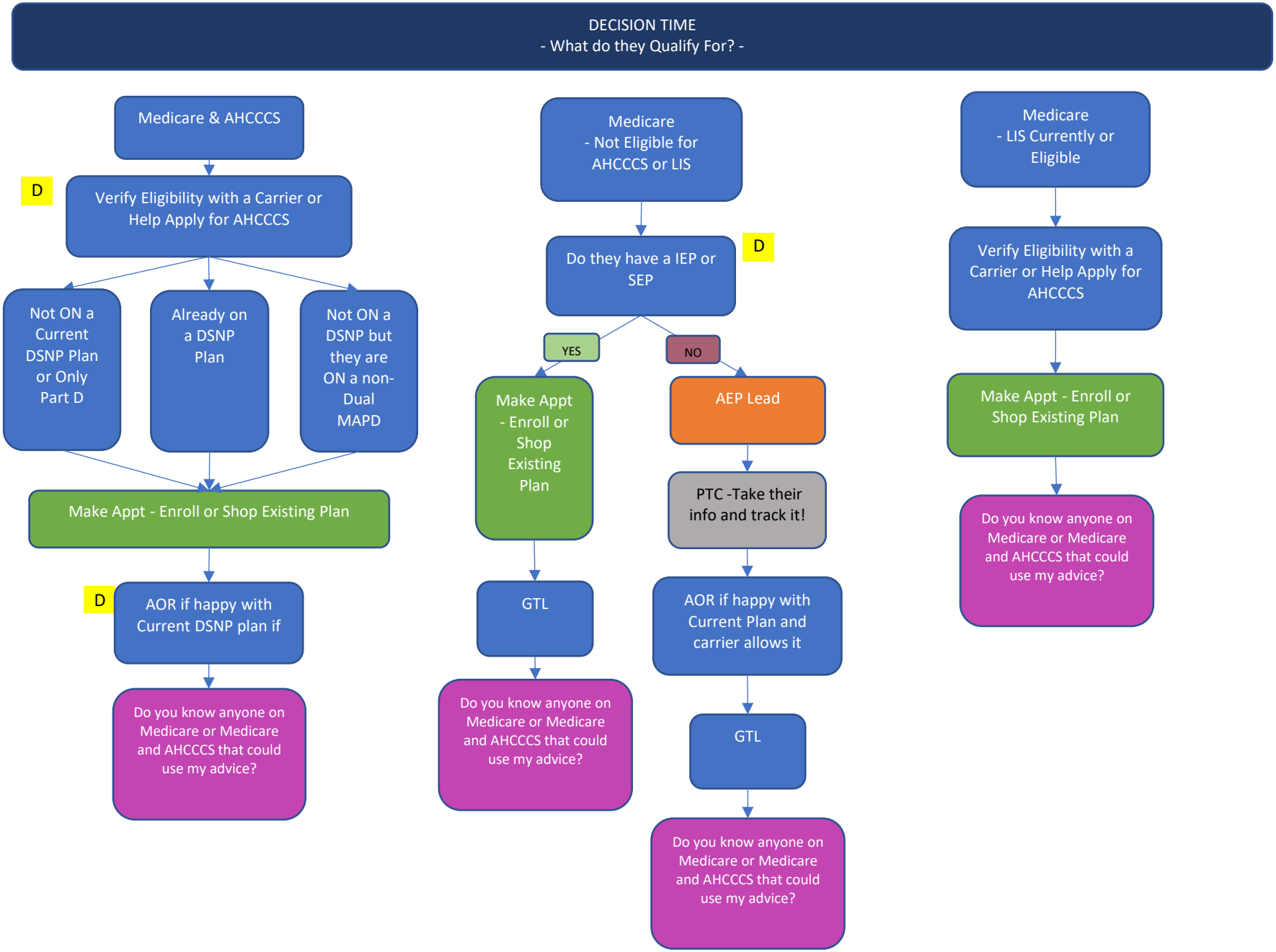

Future Lead
Immediate Sales Opportunity
Referral Opportunity
Dialog explaining nuances
Move to next Primary Question
Follow up Questions
Primary Questions
Assessing Eligibility
Primary Question 1
Do you have Medicare A & B?
YES
NO
Primary Question 2
Do you have AHCCCS or the "Extra Help" benefits for prescriptions?
NO
YES
D
Are you on Social Security Disability?
NO
YES
** You would not qualify for medicare prior to age 65. When is your Bday? I am happy to keep your inhformation and contact you a few months before you turn 65. Is that ok with you?
Has your SSDI been effective more than 2 years?
NO
YES
I am going to give you a call a month before your SSDI has been effective for 2 years and we'll get it figured out for you.
It looks like you would qualify for Medicare early. You (or We if you want to cc with them) need to get on the phone with Medicare and get that in place for you. 1-800-633-4227
PTC - Take their info and track it!
PTC - Take their info and track it!
Do you know anyone on Medicare or Medicare and AHCCCS that could use my advice?
Do you know anyone on Medicare or Medicare and AHCCCS that could use my advice?
I only have Part A
D
You can add Part B one time a year in January. I'd be happy to call you then and help you get enrolled.
PTC - Take their info and track it!
Do you know anyone on Medicare or Medicare and AHCCCS that could use my advice?
NO
YES
D
Do you recieve discounted prescriptions that cost only $1.25 or $3.70?
NO
YES
(This will come up at the last question)
Great! That is a wonderful benefit (they have LIS)
Move to Next Primary Question
Does your AHCCCS pay for Dr and Hospital Visits?
YES
(They qualify for a Dual plan)
Move to Next Primary Question


Primary Question 3
Do you have a secondary plan like an Advantage plan or Supplement?
YES
D
What plan are you on?
NO
Are you on a work plan or have Vetrans Benefits?
NO
(Good news, likely a Sale - move to the next question) May be eligible if SEP
YES
D
Make Note of the plan. Ask questions to make sure you undersand exactly what plan they are on. You'll come back to this after the next primary question.
Work Plan - Are you retiring soon or losing benefits?
VA Benefits - Do you have Tricare or Champus?
NO
YES
YES
NO
Determine when they will be off the plan and Follow up accordingly. Ask the last Question.
(Get projected income after retiring)- Make an appointment after asking the last question.
D
(This could be a hard one to sell - VA Training needed)
See VA Training
PTC - Take their info and track it!
Move to Next Primary Question
Move to Next Primary Question
Do you know anyone on Medicare or Medicare and AHCCCS that could use my advice?
Do you know anyone on Medicare or Medicare and AHCCCS that could use my advice?
Primary Question 4
D
So I can determine if you qualify for any additional state benefits - can you tell me your monthly gross income between you and a spouse? (DON'T ASK IF YOU ALREADY KNOW THEY ARE ON AHCCCS OR HAVE LIS)
D
Do they Qualify AHCCCS?
YES
YES
Do they Qualify for Extra Help?
YES
NO
NO
YES
If Income is lower than requirement call AHCCCS with them. They will have an active member # in 1-2 days. Enroll in DSNP
If income is too high - PTC - Unless SEP
If Income is lower than requirement call Medicare for Extra Help application. Answer will come in 2 week. Enroll in MAPD plan.
PTC - Take their info and track it!
Do you know anyone on Medicare or Medicare and AHCCCS that could use my advice?


DECISION TIME
- What do they Qualify For? -
Medicare & AHCCCS
D
Verify Eligibility with a Carrier or Help Apply for AHCCCS
Not ON a Current DSNP Plan or Only Part D
Already on a DSNP Plan
Not ON a DSNP but they are ON a non-Dual MAPD
Make Appt - Enroll or Shop Existing Plan
D
AOR if happy with Current DSNP plan if
Do you know anyone on Medicare or Medicare and AHCCCS that could use my advice?
Medicare
- Not Eligible for AHCCCS or LIS
Do they have a IEP or SEP
D
YES
NO
Make Appt - Enroll or Shop Existing Plan
GTL
Do you know anyone on Medicare or Medicare and AHCCCS that could use my advice?
AEP Lead
PTC -Take their info and track it!
AOR if happy with Current Plan and carrier allows it
GTL
Do you know anyone on Medicare or Medicare and AHCCCS that could use my advice?
Medicare
- LIS Currently or Eligible
Verify Eligibility with a Carrier or Help Apply for AHCCCS
Make Appt - Enroll or Shop Existing Plan
Do you know anyone on Medicare or Medicare and AHCCCS that could use my advice?