TRUSTED AMERICAN
INSURANCE AGENCY

*We Help Agents Sell Medicare Better.*

# ENROLLMENT APPLICATIONS
## SUBMISSION CHECKLIST

### WHEN COMPLETING THE APPLICATION:

- ❑ USE THE MOST UP-TO-DATE APPLICATION FORM
  - Outdated forms will be delayed in processing. Check your A3 Agent Portal for questions on forms.
- ❑ Verify Client DOB
- ❑ Verify Client Address (including suite or unit number, correct zip code and city name, etc)
- ❑ Verify Client Legal Name
- ❑ Verify Effective Dates for Medicare Parts A & B
- ❑ Include Client's Beneficiary ID or Copy of Medicare ID Card
  - THIS IS VERY IMPORTANT – Applications submitted without a Beneficiary ID cannot be processed!
- ❑ Collect Client Payment Information (including a voided check for EFT payments)
- ❑ Provide Prior Coverage Information
  - Including Term Letters and ID Cards where applicable
- ❑ Confirm New Coverage Information
  - Including Effective Dates and Supporting Documentation where applicable
    - Copy of Client's ID
    - Copy of Current Bank Statement
- ❑ Ensure all fields are COMPLETE and LEGIBLE – we MUST be able to read the application!
- ❑ Ensure Client has SIGNED the Application

### WHEN SUBMITTING THE APPLICATION:

**For DIGITAL application submissions go to PlanCompare Edge**

**For Paper application submissions:**

- ❑ Go to Enrollments within your A3 Agent Portal
- ❑ Click on "+ New Enrollment"
- ❑ Upload the completed Application
- ❑ Complete Your Writing Agent & Submitting Agent Information
  - IF YOU ARE NOT LICENSED TO SELL THE PRODUCT – please do not sign the application.
  - Submit a coversheet with the submitting agent and writing agent information.
- ❑ Enter Your Client's Basic Information (or select from pre-existing Client List)
- ❑ Enter the New Plan Information
- ❑ Verify all information is correct & legible
- ❑ Hit "Submit Application"