

MEDICARE PLAN ENROLLEE FOLLOW UP CALL GUIDANCE

This post-effective date outreach guide is a great way to bring consistency to your approach...

WELCOME THEME: “Understanding and utilizing your plan”

INTRO

- Ask if there are questions about plan benefits
- Ask if they have received their ID Card and explain what to do if they have not received it yet (ID Cards can be ordered through tools like [MyHumana Registration*](#))
- Confirm New Member Orientation (NMO) date or discuss alternative NMO process

PCP

- Ask if they have made initial contact with their doctor, encourage contact if not made yet
- Review the importance of using network providers
- Review how to access specialists

PREVENTATIVE CARE

- Ask if they have had their flu/pneumonia shot yet. Let member know if they received it at a location besides PCP, to inform their doctor that they had the shot
- Ask if they have knowledge of their routine vision benefits, review if necessary.

DRUG COVERAGE

- Review RX guidance tools
- Inform member of the benefits of Mail Order programs

CAREGIVER

- Determine if member has a caregiver and if so, send member a PHI consent form for the caregiver (Can also be done on Member Portal like [MyHumana.com](#))

OTHER/CLOSING

- Schedule office tour, or carrier local office or Guidance Center tour if applicable
- Explain Health Assessment call to Enrollee
- Remind them of HOS/CAHPS survey (only January – May). Explain the importance of completing this survey.
- Review if they have registered on their carrier portal (e.g. [MyHumana.com](#)) and the benefits of doing so
- Ask for referrals, including names and addresses, but do not request phone numbers
- Ask member to call you for assistance if they have any questions or issues using the plan
- Remind member to expect 60 day call

MEDICARE ADVANTAGE ENROLLEE FOLLOW UP CALL GUIDANCE

60 DAY THEME: “Health and Benefits”

INTRO

- Ask if any questions about plan/benefits

DRUG COVERAGE

- Review RX Summary and/or EOBs

PROGRAMS

- Discuss Plan Rewards OR Vitality programs as applicable
- Discuss Value Added Services (Where applicable)
- Discuss Telemedicine or Nurse Line resources
- Discuss Silver Sneakers/Silver Fit where applicable

OTHER

- HOS/CAHPS survey reminder (only January – May)

CLOSING

- Ask member to call you for assistance if they have any questions or issues using the plan
- Ask for referrals, including names and addresses, but do not request phone numbers
- Remind member to expect 90 day call

90 DAY THEME: “Money saving opportunities”

INTRO

- Ask if any questions about plan/benefits
- Review of member’s experience and plan usage thus far

PROGRAMS

- Remind members of all the tools that are available to them, including RX Summary and tools that can help them reduce out of pocket expenses

OTHER

- HOS/CAHPS survey reminder (only January – May) Explain the importance of completing this survey

CLOSING

- Remind members about SNP and SEP opportunities that their friends and family may benefit from
- Ask for referrals, including names and addresses, but do not request phone numbers.