Medicare

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Course 4:

Patient Engagement Best Practices

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- Importance of patient engagement
- Effective communication strategies
- Building trust and rapport
- Addressing patient concerns and providing quality service
- Utilizing technology for patient education and communication

Say What? →

Effective Communication

Human incompetence, laziness, and wastefulness should not be underestimated – especially at scale!
— John A. List

The unforgivable crime is soft hitting. Do not hit at all if it can be avoided; but never hit softly.
— Theodore Roosevelt

Start where you are. Use what you have. Do what you can.
— Arthur Ashe

Incompetency is insurmountable; Be the best you can be.

- Review and hone your ability to explain Original Medicare, Option 1 and Option 2
    - Review and study Medicare Basics, Medicare Supplemental Plans + Part D, and Medicare Advantage; Courses 1-3
    - Know how each plan works
    - Be able to explain the differences between Option 1 and Option 2

“Do the best you can until you know better. Then when you know better, do better.”
— Maya Angelou

Simplicity Wins

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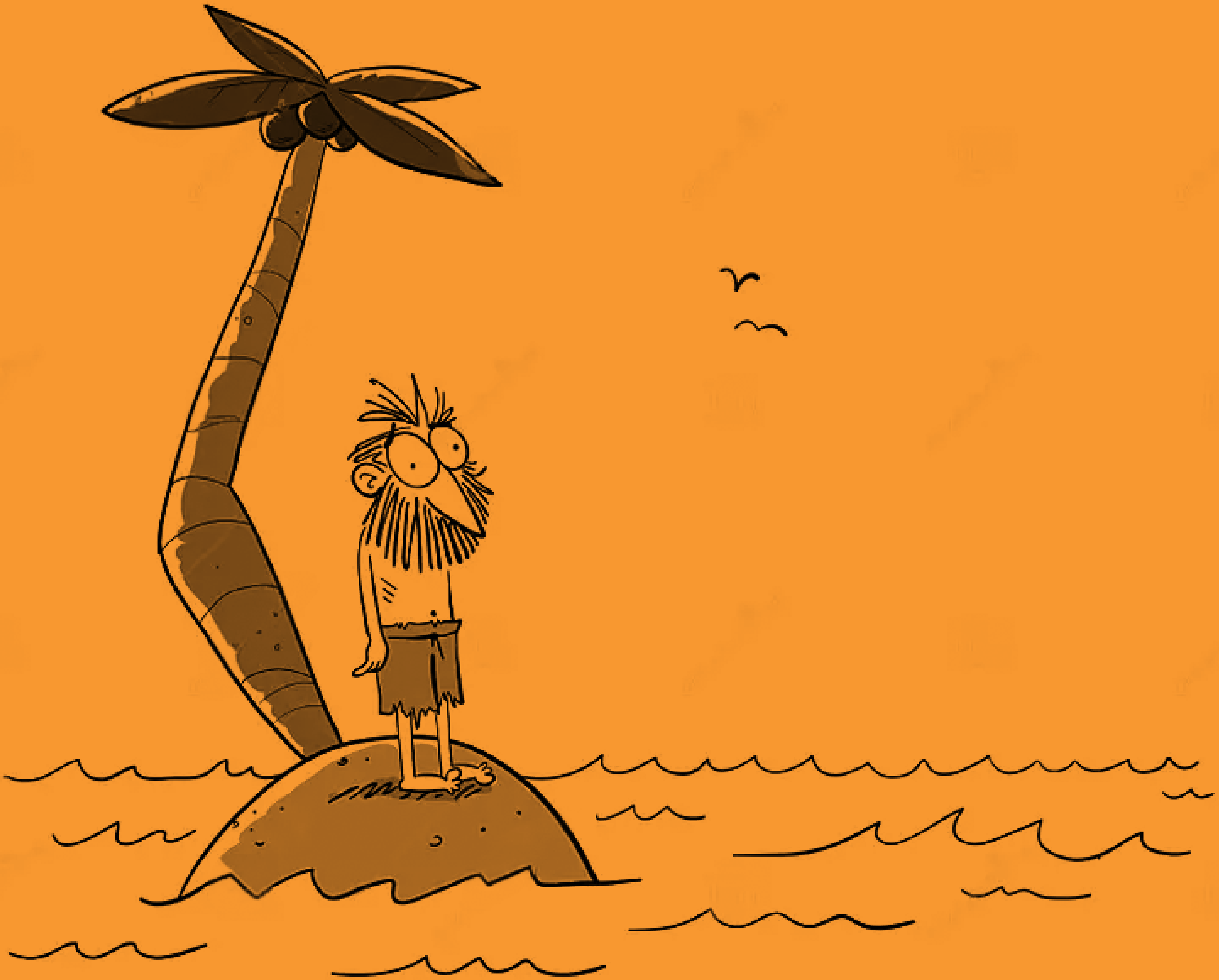

YOU'RE NOT ALONE

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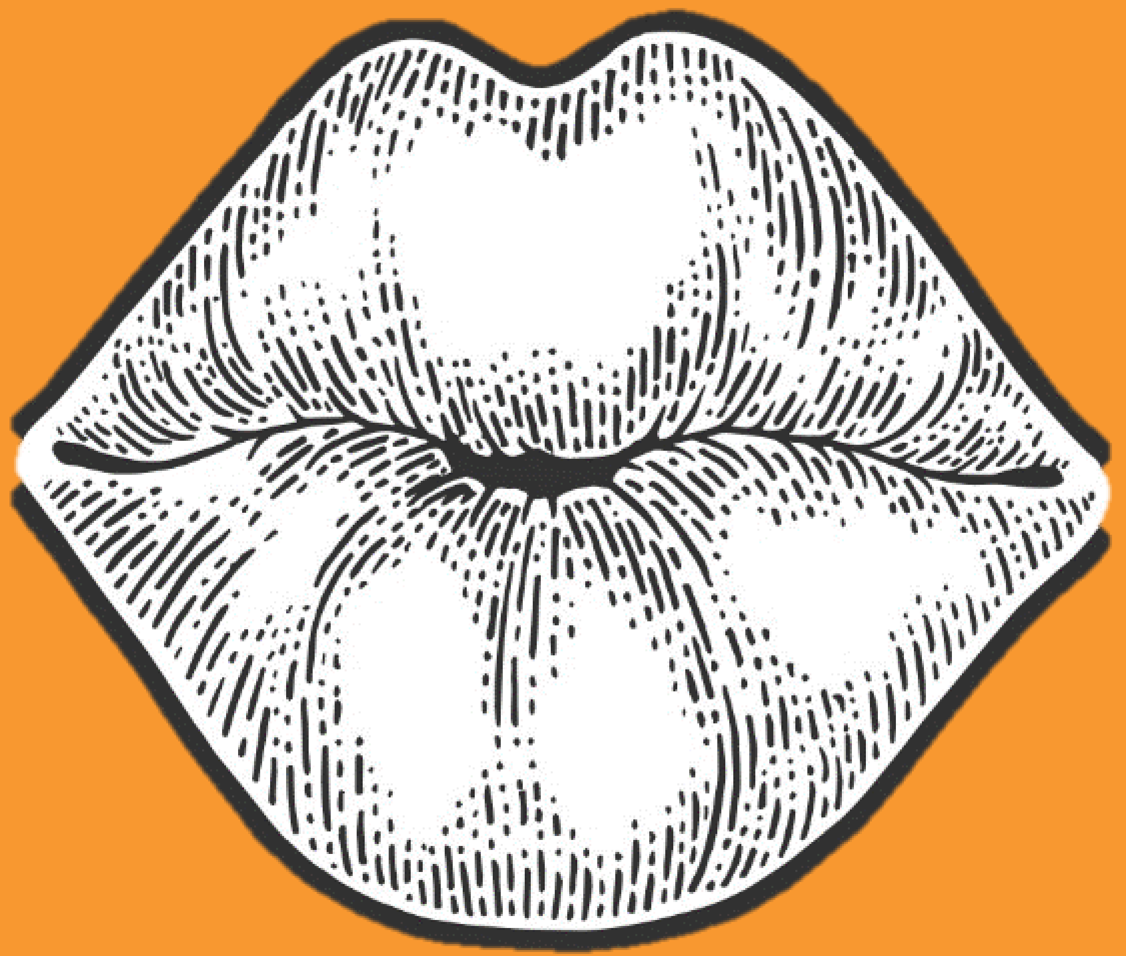
Keep It Simple & Straightforward



1. Our primary job is to educate the client so they can make an informed decision.

2. Use clear communication and sales techniques to explain Medicare's pertinent parts and help people understand what solution is best for them.
   - Not just the details
   - Keep it as simple as possible for your audience
   - Focus on the biggest, most important items
   - Address questions as they arise

3. Don't let Medicare overwhelm your audience

Avoid any unnecessary complexity.

TIP:

- Go back and watch Medicare Basics, Medicare Supplemental Plans & Part D, and Medicare Advantage

- Pay attention to the shared stories. You don't have these experience yet, but can make them your own. Use them to your advantage.

Rapport

Build Rapport

- Need to establish some level of relationship
  - Shared known people, community, common ground
- Find some "general" topics of conversation.
  - Kids
  - Develop commonality
- Let the client feel comfortable with you
- Don't just jump into the "sales pitch"

Caution:

- Don't become their "therapist" or "best friend"

  — Manage your time!

Always Put the Patient First

Needs Assessment Form

- One document to gather comprehensive client information
- Goal is to gain a clear understanding of the client's needs
- Enables plan recommendations which align with the client's health requirements and preferences.
- Helps ensure client's enroll in plans that cover their healthcare medications, services, and needs.

Benefit of Using the Needs Assessment Form

- Accurate understanding of client's needs
- Tailored plan recommendations
- Minimized coverage gaps
- Cost-effective choices
- Education and empowerment
- Long-term relationship building
- Competitive advantage

The most effective approach for offering coverage options & plan recommendations that align with your client's present circumstances.

Always Put the Patient First

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INTERNAL USE ONLY
MEDICARE NEEDS ANALYSIS
Starting with the basics

Name: ____________________
Address: ____________________
County: ____________________
E-Mail: ____________________
Referred By: ____________________
Cell Phone: ____________________
Home Phone: ____________________
DOB: ____/____/____
Medicare: ____________________
Part A Effective Date: ____/____/____ Part B Effective Date: ____/____/____
Medicaid: ____________________

STILL WORKING:
☐Yes ☐No ____________________
If yes, where?
How much longer do you plan on working? ____________
Will your employer offer a Medicare plan? ☐Yes ☐No

SPOUSE STILL WORKING:
☐Yes ☐No ____________________
If yes, where?
How much longer do they plan on working? ____________
Will your employer offer a Medicare plan? ____________

EXTRA HELP:
Is your monthly income equal to or above $1,903 in 2024 ($2,575 for couples)? ☐Yes ☐No

VETERAN:
☐Yes ☐No If yes, signed up for medical/drug benefits? ☐Yes ☐No

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888-341-4314 | agentsupport@myicbn.com | www.myicbn.com

Needs Assessment - Cover the Basics

- Contact information
- Birth date
- What insurance are you on?
- What doctor(s) do you see? Specialists?
- Do you want to continue with them?
- Prescription drugs, quantity, dosage?
- What other services/insurance do you need for example Dental, Vision, or Hearing care (DVH), Over-the-Counter (OTC) cards
- Are there “Extra benefits” you like or use i.e. gym membership or transportation

TIPS:

- Fill out the form as if you’re having a conversation
- Ensure accuracy
- **LISTEN TO YOUR CLIENT FIRST**
- **DON’T MAKE ASSUMPTIONS, CLARIFY**

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Finding the “Right” Medicare Plan
- Not all plans are the right plan.
- Filter out plans that don’t meet your client’s Needs Assessment requirements
- Ideally 1-2 plans will meet their needs; Present those options

QUALITY SERVICE ≠ Presenting <u>ALL</u> the options
- Overwhelming
- Confusing
- Unable to make a decision

QUALITY SERVICE = Present the most aligned plans to your client’s needs
- Discuss the plans
- Simplify and Clarify
- Enable them to make a decision on the same day as your meeting

Do the best you can. Document your conversations.

FIND THE BEST FIT
FIND THE BEST FIT
FIND THE BEST FIT

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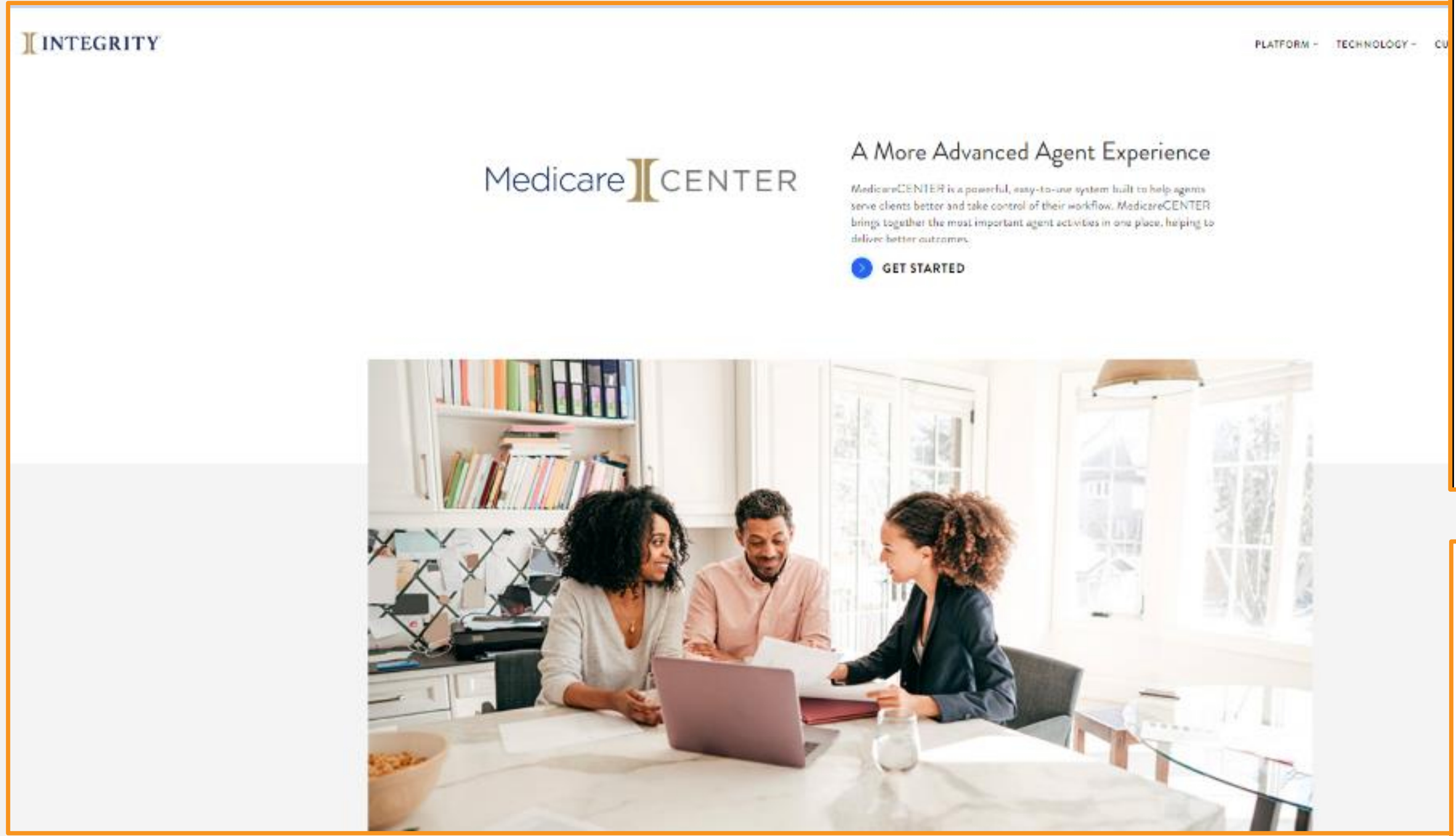
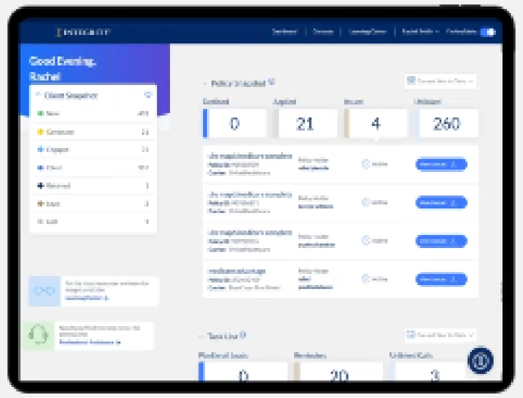


Integrity's Integrated Platform:

Integrity for Agents

Integrity provides agents the key pieces they need to serve their clients — all from a single sign-on.

- Client Management
- Task Management
- Policy Management
- Compliant Call Recording
- Scope of Appointment
- Quote & eApp
- Data is securely protected and owned by the agent



Integrity

Key Features

The Integrity MedicareCENTER platform helps agents provide better service, manage clients, build relationships, and grow their sales.

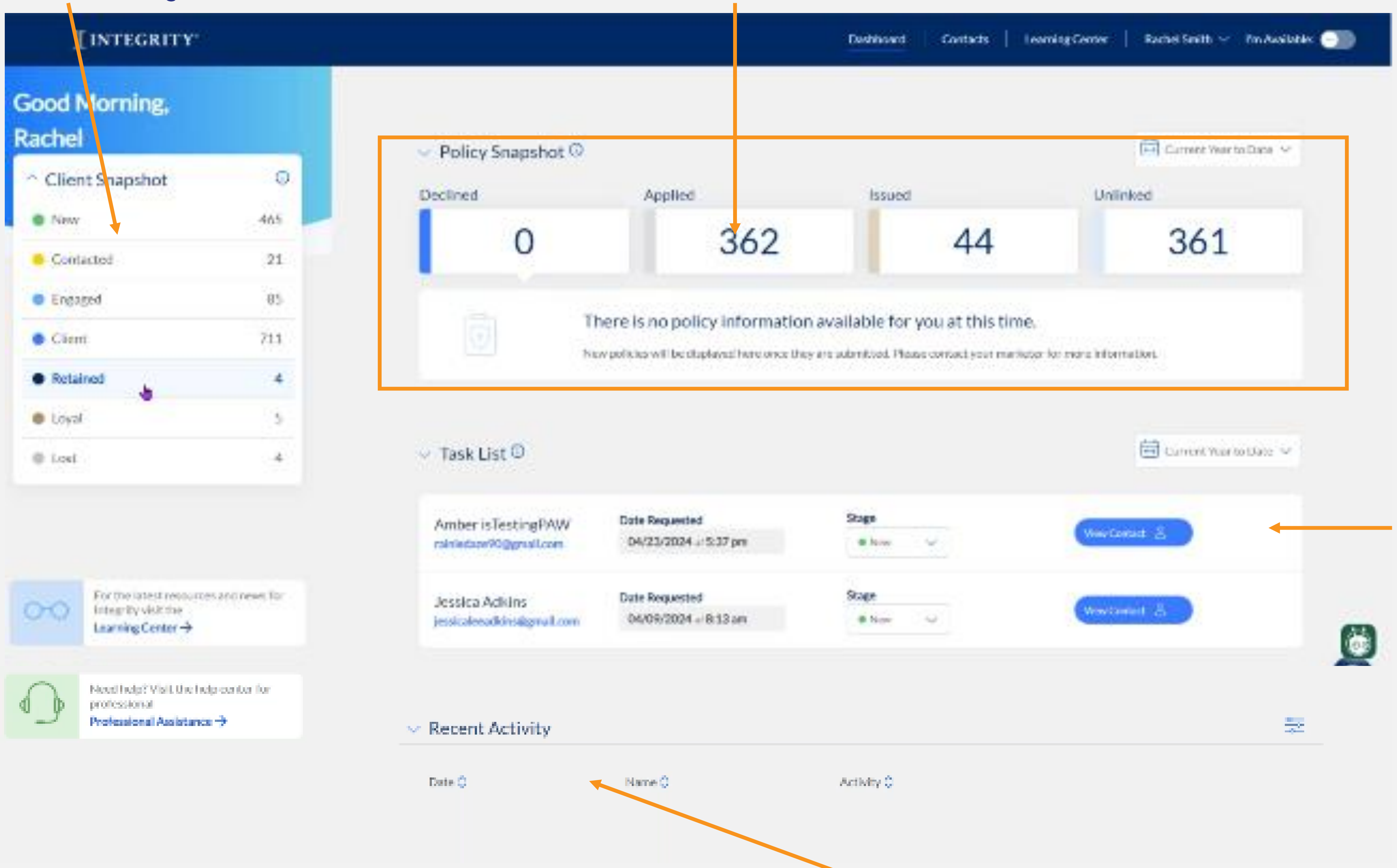
1. Seamless Integration with LeadCENTER
2. Cross-sell, Switcher and SEP Ask Integrity Recommendation Tags
3. Call Recording with Ask Integrity Call Summaries
4. Ask Integrity Specialist Recommendations
5. PlanEnroll Personal Agent Website Integration

Your Resources

MedicareCENTER

Client Activity

Policy Data



Task List

- Unlinked clients
- Health SOA
- Plan enroll leads
- & more

Recent Activity

Your Dashboard

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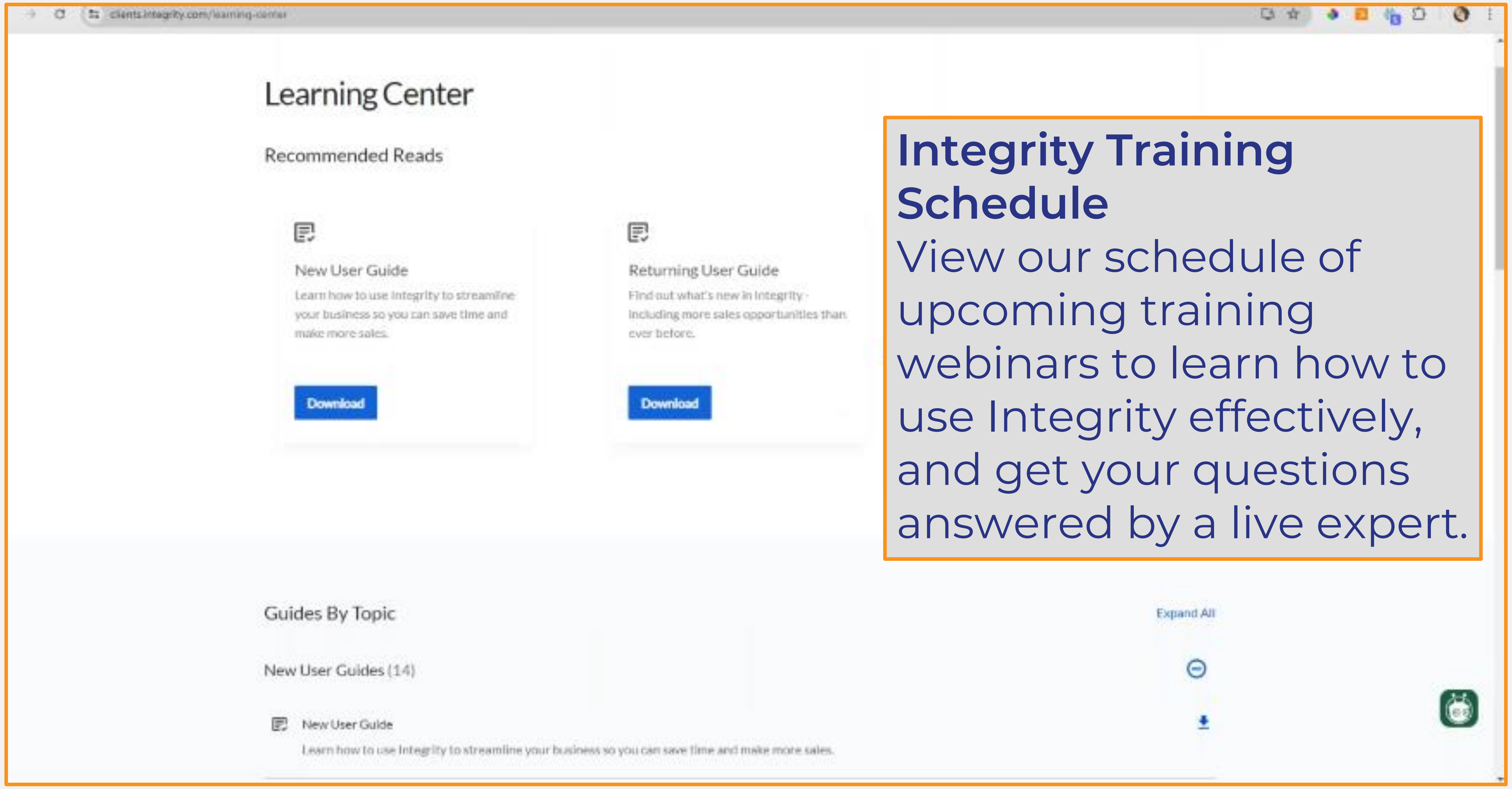

Integrity Training Schedule

View our schedule of upcoming training webinars to learn how to use Integrity effectively, and get your questions answered by a live expert.

Your Dashboard

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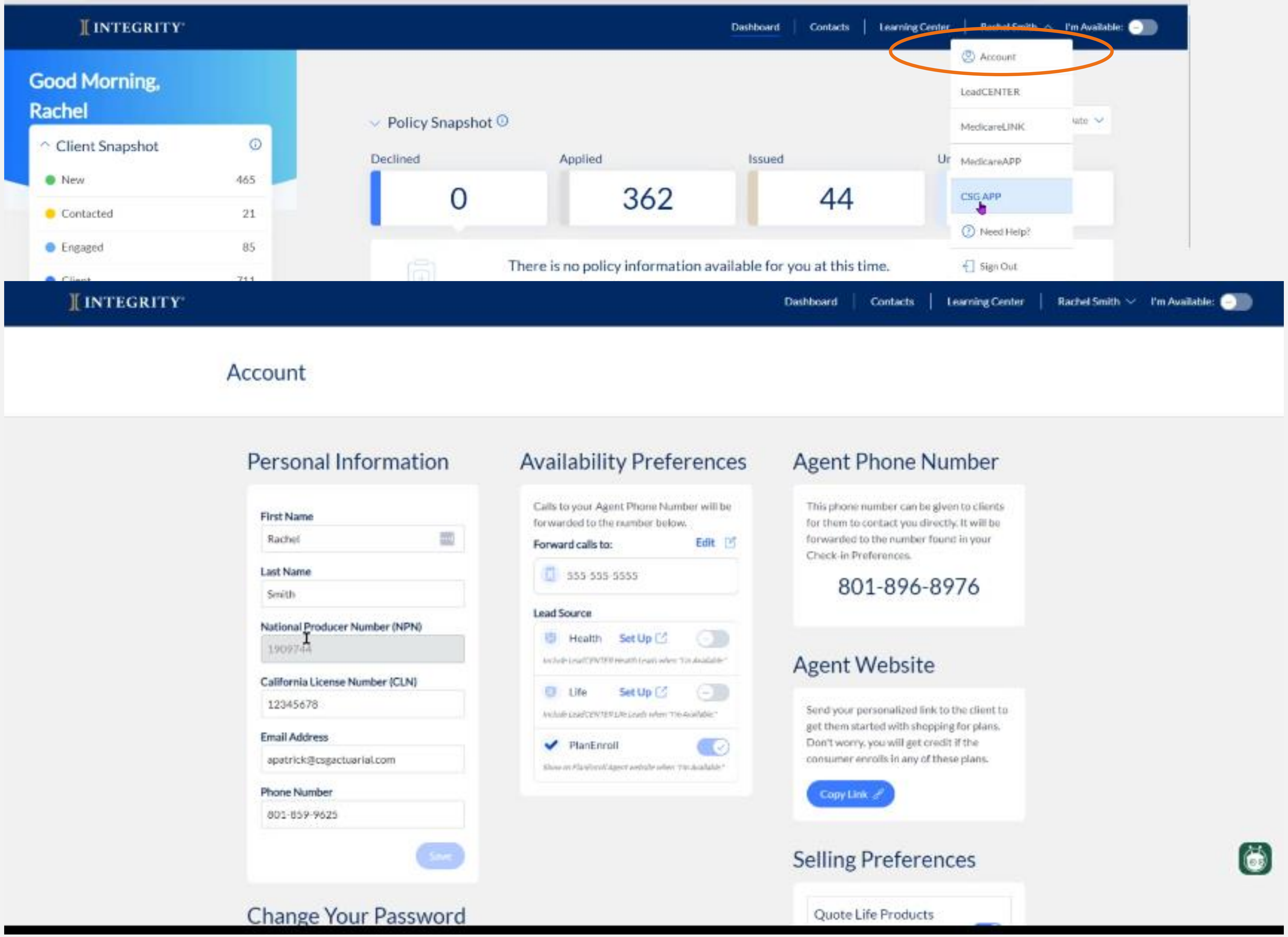

Agent Phone Number

- The phone # you provide in your profile (#1), will linked to an automatically assigned an Agent Phone # (#2)
- The Agent Phone Number is utilized for call reporting.
- That number is routed to the one provided by you when called.
- The system records and stores the conversation on MedicareCENTER for you.
- Call can be associated with your client's profile
- System is available 24/7.
- Note the Agent Phone # shows on client's caller ID when you call from within the system.

Your Agent Phone Number

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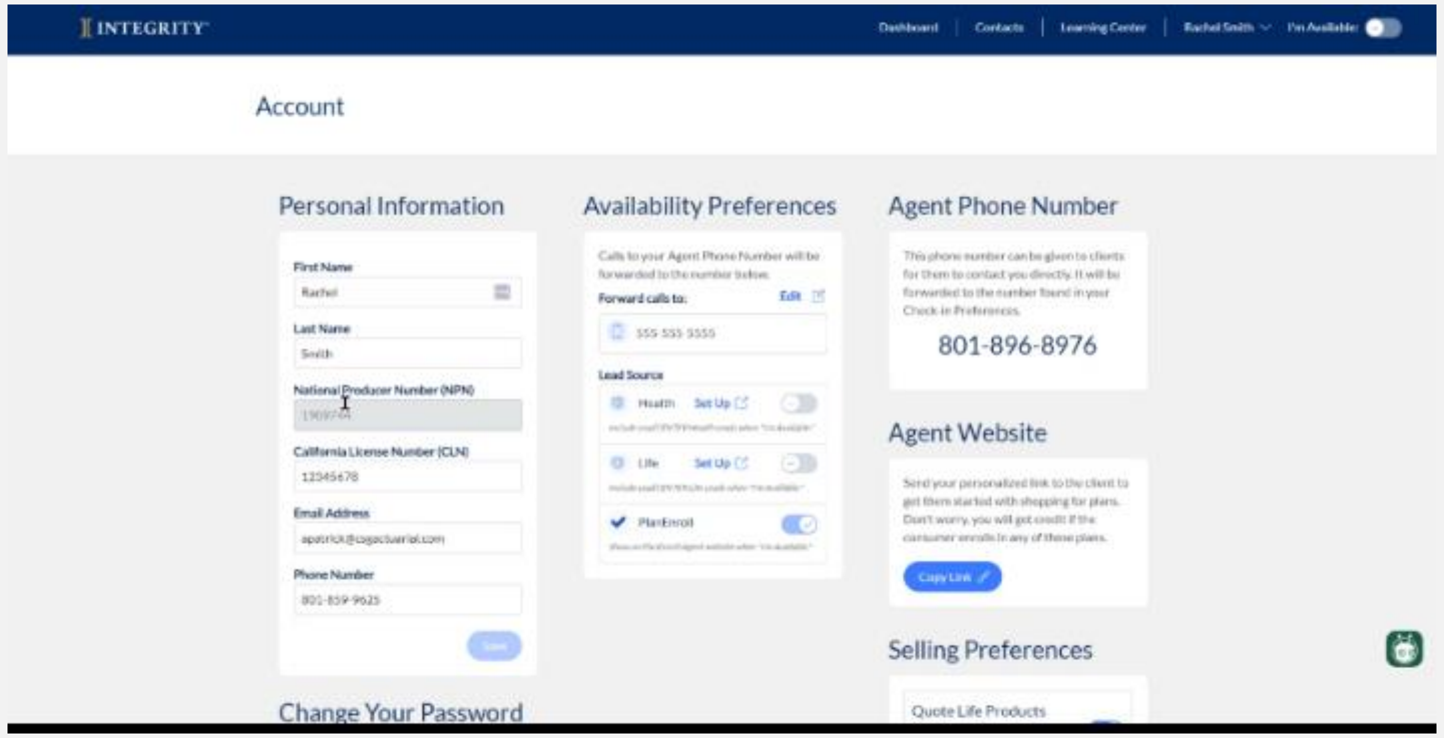
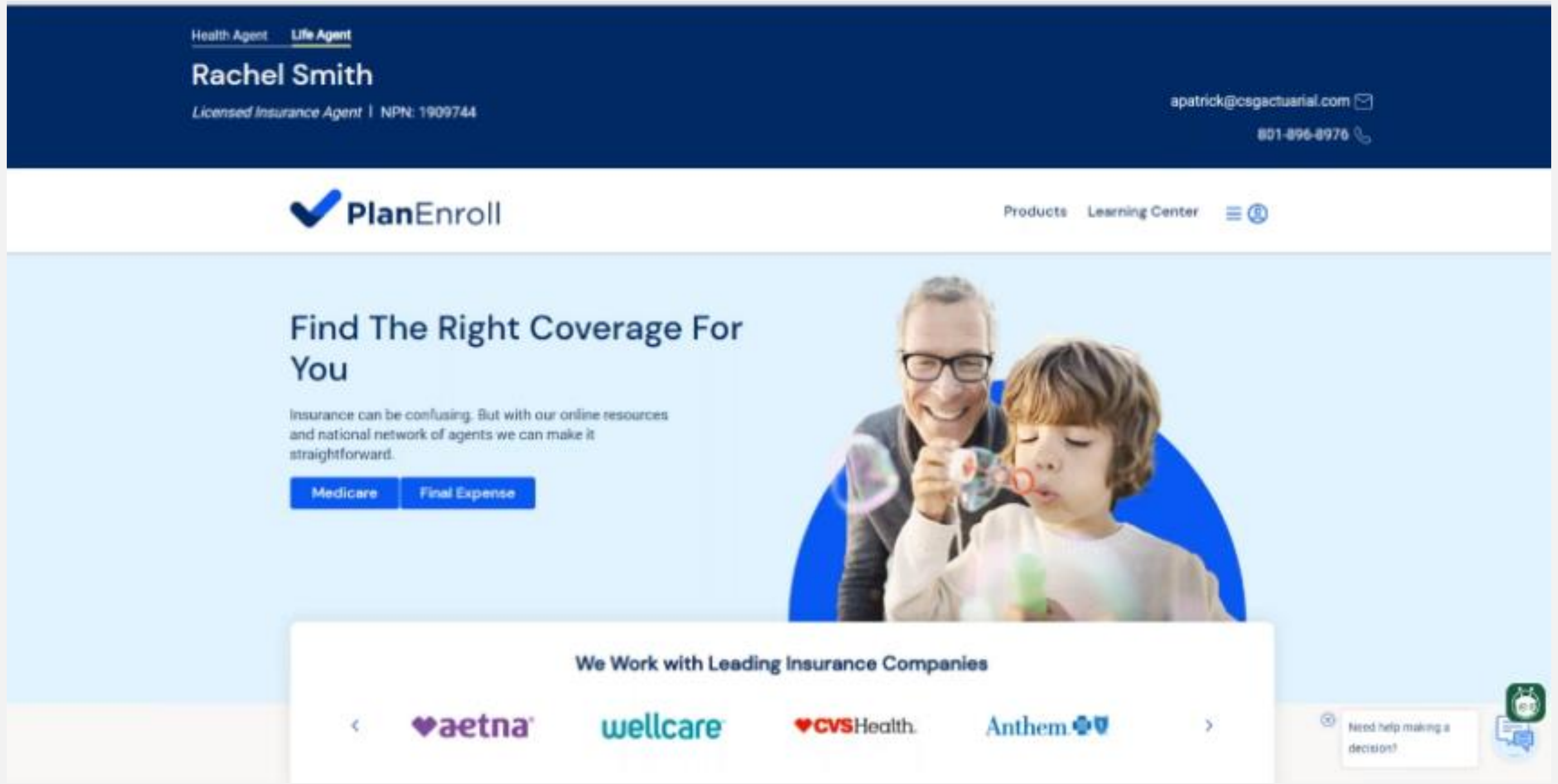
Plan Enroll – Your Website





Agent Website

- Copy link and paste into a new browser
- Each "PlanEnroll" website is unique to the agent
    - Name
    - License #
    - Contact information
    - Type of Insurance available Health Agent / Life Agent

- Able to quote Medicare from site
- Will only show carriers you are contracted with (Active selling permissions)
- Link to Learn Center – product information – active links that you can share
- Client's able to sign-up and create their own profile (New Contact Record established). If a contact already, ensure they use the same first, last name and email so profile links with your client contact.

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Active Selling Permissions

Life | Health

Plan Year	Carrier	State	Product	Producer ID
2024	Atrio Health Plans	NV, OR	MA MAPD	1909744
2024	Essence Healthcare	AR, CA, FL, GA, IL, IN, KY, MI, MO, OH, VA	MAPD	1909744
2024	BCBS KC	KS, MO	MA MAPD PDP	14160000
2024	Molina Healthcare	ID, KY, MI, NV, NY, OH, SC, TX, UT, VA, WA	CSNP DSNP MA MAPD PDP	1004593
2024	Mutual Of Omaha Corp	GA, MA, MS, MT, NM, PA, VA	PDP	1909744

Show More

Active Selling Permissions

- Carrier information transferred by carrier or FMO
- Able to self attest for carrier

Your Dashboard

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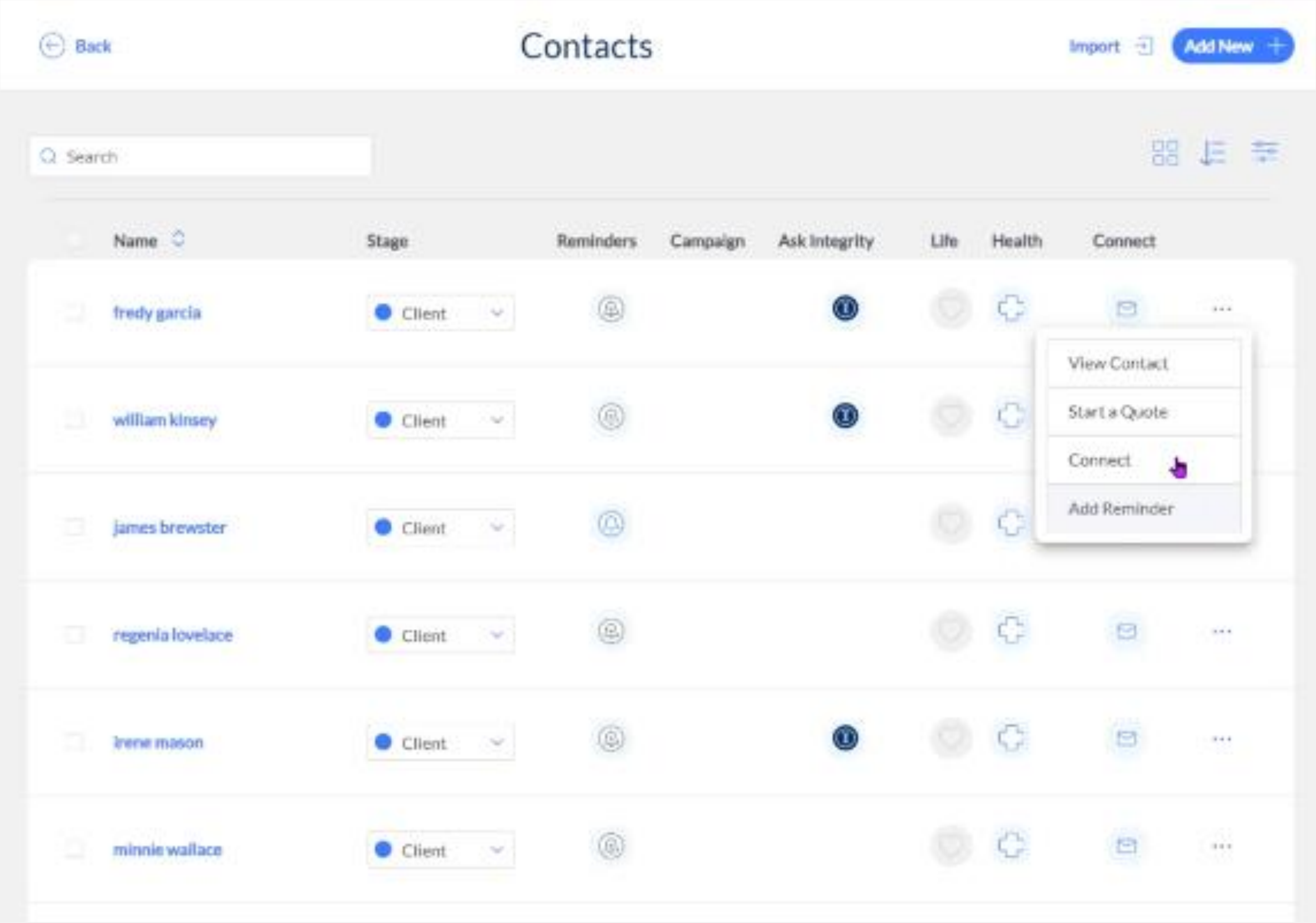


Contact Record

Contacts
- View contact
- Start a quote
- Connect
- Add reminders

- Contacts can be filtered by tags, stage, carrier, plan
- **Ask Integrity** can provide a contact summary or locate a specific call recording.

Profile
- Contact details
- Health Profile
  - Height, weight,
  - Pharmacy, Doctors, Specialists
  - Prescriptions

Policies
- Previous & current

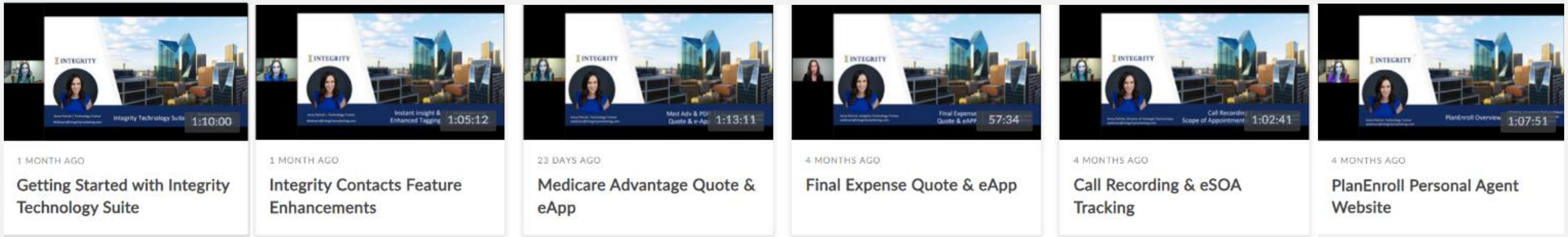
Connect
- Call
- Email
- Call Scripts
- Scope of Appointment - send by text or email; track waiting period

Start Quote

Training Tools

ICBN Mastering Medicare Series: https://www.myicbn.com/videos

MedicareCENTER
Prerecorded Webinars: https://www.gotostage.com/channel/integrity-webinars



Upcoming Webinars:
https://learningcenter.tawebhost.com/MedicareCENTER-Webinar-Schedule.pdf

Training Videos

Nothing runs smoothly. Do your best. Roll with it.

"...focus on what to do next. Spend your energies on moving forward toward finding the answers".

— Denis Waitley

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Thank you!