

Q. I sell several other insurance products in addition to Medicare Part D. What if a client approaches me in a pharmacy and asks if I offer any other products?

*A. If the product is listed on the SOA (i.e. Med Supp or Hospital Indemnity) you must inform the client that they can fill out the SOA and then you can set up an appointment 48 hours later. You can only discuss and sell the Part D and Medicare Advantage carriers that have been reported to CMS through our Pharmacy Reporting System.*

Q. A potential client is more interested in a MA-PD, can I fill out an enrollment application at a scheduled pharmacy appointment?

*A. If you are representing a Part D carrier only you cannot take an application at that appointment. You will need to have the client fill out a SOA for MA-PD and visit them 48 hours later.*

Q. A client approaches me and is persistent that I speak to them about Annuities. How do I respond without losing a potential client?

*A. It's important to stress to the client that you are more than happy to meet with them in the future however you are at a CMS Scheduled Sales Event and can only discuss Part D and Medicare Advantage Plans that have been reported to CMS. You can give them your business card and ask them to contact you at another time.*

Q. Can I hand out my SmartD Rx agent business card to a client who wants to speak about other products?

*A. The SmartD Rx business is only for Part D. You may provide your card if it's possible the prospective member may have additional questions about Part D products, but if it is clear the potential beneficiary only wants information on other products, this card is not to be provided*

Q. I want to provide a sign-in sheet to capture beneficiary information, is this compliant?

*A. You may provide a sign-in sheet but MUST state the completion of the sheet is optional.*

Q. I am going to be 20 minutes late to my scheduled pharmacy appointment, what do I do?

*A. You must call Agent Support Hotline as soon as you know you will be late. They can be reached at 855-552-2885. If this is the first time you have been late you are not allowed any more occurrences or your contract will be terminated.*

Q. I have a family emergency on the day of my scheduled event and can't call to notify anyone and don't show up, what happens to my contract?

*A. In this instance you will be terminated and will not be allowed to re-contract.*

Q. I have a scheduled pharmacy appointment on Tuesday but find out on the Friday before that I might not be able to attend, is it ok to wait until Monday to let Agent Support know?

*A. If there is any chance you will not be able to make it to your Pharmacy you must notify Agent Support 72 hours in advance of the scheduled sales event.*

Q. If SmartD isn't the best plan for the client can I enroll them in another plan right there in the pharmacy?

*A. If the carrier that fits your client has reported a sales event to CMS utilizing our Pharmacy Reporting System then you can complete that enrollment right there. If it hasn't been reported you must take a Scope of Appointment and schedule an appointment at another location 48 hours later. You will be notified of which plans you can represent before your appointment via email.*

Q. Can I bring donuts or muffins to my scheduled pharmacy appointment for the potential clients?

*A. You cannot provide meals or snacks at any scheduled sales event per CMS regulations.*

Q. Can I talk about non-healthcare products during a scheduled sales event?

*A. You may ONLY talk about the products that have been reported to CMS at a scheduled sales event.*

Q. Do I need to fill out a Scope of Appointment for everyone that I speak with in a pharmacy?

*A. SmartD Rx will report a scheduled sales event any time you are in a pharmacy and they require you to take a SOA for everyone you speak to.*

Q. What happens if a pharmacist asks for a time or date change for my scheduled appointment?

*A. You will be notified as soon as we are made aware of the change. If you cannot make it you will not be penalized as this was out of your control. If you are able to make it we will go ahead and change the appointment information in our scheduling system and you will receive email and text reminders before your event.*

Q. I have a cell phone but can't receive or send text messages, how will I be able to check in and out of my scheduled appointment in the pharmacy?

*A. You will be able to call our Agent Support Hotline and they can check you in and out. They can be reached at 855-552-2885.*

Q. I have an appointment in a pharmacy tomorrow morning that I can't make but my friend Dave who is also contracted and certified with SmartD can make it, is this acceptable?

*A. This event was scheduled and reported to CMS using you as the agent, you must notify us at least 72 hours in advance if you can't make it. In this situation Dave could not sit in for you as he was not the agent reported to CMS.*

Q. I have an appointment in a pharmacy tomorrow morning but have run out of SmartD enrollment information, can I access this information online and print what I need?

*A. Yes, you will be able to access via the SmartD website.*

Q. I am at my scheduled pharmacy appointment and the pharmacist decides he/she doesn't want an agent there today, what do I do?

*A. If this happens contact our Agent Support Hotline immediately and inform them of the situation. They will instruct you what to do next.*

Q. A client is interested in signing up for SmartD but doesn't have his/her Medicare card handy, what do I do?

*A. Tell them when you will be back in the pharmacy and ask them to stop by then. You could also set an appointment up in their home for 48 hours later.*

Q. How long do I have to turn in an enrollment form?

*A. You must turn in an enrollment form within 48 hours of the beneficiary signature. This timeframe does include weekends.*

Q. I've received an email that states I am missing information on an enrollment form I submitted, how long do I have to complete and submit?

*A. You will need to turn in the corrected enrollment form within 24 hours of the email. This timeframe does include weekends.*