

Clover Health

Agent Enrollment Reminder Checklist

Agents, please use this list to ensure you have reviewed and have completed (if applicable) all necessary forms with the enrollee.

Scope of Appointment (SOA)

SOA is a CMS-required document you must complete with the beneficiary before you start the enrollment presentation. Each beneficiary must have his/her own SOA, and the SOA must clearly state which product(s) you will go over during the scheduled appointment. This document must be submitted with the enrollment form.

Pre-Enrollment Checklist

The Pre-Enrollment Checklist contains important disclaimers to help ensure the enrollee understands the benefits and rules associated with the health plan. This is a CMS-required document that must be given to the enrollee.

Review Provider and Medication List

You must review each prospect's current medications, physicians and explain prescription mail order delivery.

Enrollment Application

It is important that all the information on the application is correct. Please take time to recheck the following fields to make sure this information is complete and correct:

- Primary care physician (required for HMO enrollees)
- Medicare number
- Mobile phone number
- Home phone number
- Email address

Statement of Understanding (SOU)

SOU is **required** if the enrollee decides to enroll. This form ensures statements Clover deemed essential are reviewed with the beneficiary before the enrollment process is considered complete. You must submit the SOU to Clover with the enrollment form.

How to submit an application online:

1. Go to cloverhealth.com/en/brokers and select "Find the right plan" in the blue box.
2. Type in the zip code of your client to see what plans they are eligible for. You may be prompted to select the county they belong to.
3. Once you type in the zip code, you'll see a list of plans. Select the plan in which your client would like to enroll.
4. Input the required information into the enrollment form and hit submit.

Agents may also use the various remote platforms available for 2021 to submit their applications. Please reach out to Broker Support if you have questions on the remote enrollment platforms.