

The Right Stuff

Incomplete and erroneous applications cost policyholders, Agents and UA time and money

By giving extra attention to detail, the New Business application can be processed in a more timely manner with fewer errors. Remember,

Processing delays affect your pay and cost you money!

New Business Checklist

Check these three simple items to assure fast and efficient processing of new business applications:

1. Make sure the application is complete and correct:
 - Is the age and date of birth consistent?
 - Is the name and address of the applicant complete, correct and legible?
 - Are all applicable health questions answered properly?
 - Are the Medicare ID numbers included, correct and legible?
 - Did both the Agent and applicant sign the form?
 - Is the bank draft information correct and legible?
 - Did you include a personalized voided check, authorization and the account routing number?
 - Is the date of the application correct and legible?
 - Is the premium paid specified?
2. Make sure proper forms are used:
 - Is this the proper application?
 - Are all required state specials included?
 - Is this the most current app form required?
 - Are the replacement forms correct and complete?
 - Have you attached any necessary forms to prove the applicant is on Medicare and is not enrolled in a Medicare HMO?
3. Make sure the premiums are correct:
 - Was the premium calculated properly?

Always submit apps to the Home Office on a timely basis!