Direct Fax Agent Guide

TO-PDP Direct Fax

TODAY'S OPTIONS®

PRESCRIPTION PATHWAY℠
Medicare Prescription Drug Plans

When it comes to agent service, Today's Options and Prescription Pathway's top priority is efficiency and accuracy. Our Direct Fax program allows you to submit enrollments and receive commissions faster than ever before. With strict Centers for Medicare & Medicaid Services (CMS) guidelines, time is of the essence. Enroll today and provide your clients with the fast service they deserve.

With Direct Fax, enrollments can be submitted by fax 24 hours a day, seven days a week. Your faxed pages are received at our fax server as optical images that are then processed by the Today's Options and Prescription Pathway Enrollment Teams.

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Enrolling in the Direct Fax Program
The key to Direct Fax success lies with you, the producer. Before enrolling as a Direct Fax User, several requirements must first be met:

- Your fax machine must be located in your office. The use of neighboring fax machines or those at any other location (The UPS Store, FedEx Kinko's, Office Depot, etc.) is strictly prohibited due to HIPAA requirements.

- You must save the original enrollment form along with the confirmation received via e-mail or phone as proof of submission. Without this information, enrollment submissions cannot be acknowledged or verified. Confirmation of receipt will be sent by fax if you do not specify an e-mail address or are unable to be reached by phone or left a message.

Once you have met the requirements listed above, simply follow these important enrollment instructions:

1) Complete **all** agent information on the Cover Sheet (attached).
2) Check the box to signify this is your first time using Direct Fax and you wish to enroll in the program.
3) Fax only the Cover Sheet to the fax number provided on the form.

You should receive a confirmation e-mail or phone call within approximately two hours. When the confirmation is received, you are officially enrolled in the Direct Fax program and may begin submitting enrollments. If you do not receive a confirmation within two hours, please call **Today's Options** 1-866-856-5849 or **Prescription Pathway** 1-866-258-8735 to speak with a Direct Fax Processor. E-mail inquiries may also be sent to directfax@patni.com. ***NOTE: Do not transmit personal health information over internet e-mail.***

After Hours Direct Fax Submissions: While you may submit enrollments through Direct Fax 24 hours a day, seven days a week, our Fax Processors are available Monday – Friday, 9 a.m. – 6 p.m. EST. If you submit a Direct Fax after 5 p.m. EST, you may not receive a confirmation until the next business day by 10 a.m. EST. If we receive your fax before midnight (your time), the enrollment will be marked as received on that calendar date. This is particularly important for month-end submissions—as long as we receive your fax by midnight (your time) on the last business day of the month, your enrollment will count for that month.

NOTE: By submitting the initial Agent Enrollment fax, you agree to adhere to all requirements and procedures as covered in this document. Failure to comply with these guidelines or properly use this program may cause you to lose your Direct Fax privileges.

Submitting Enrollment Forms Via Fax
Upon successful enrollment, you may begin submitting enrollment forms via Direct Fax. To ensure that your application is processed as quickly as possible, please make sure to:

- Fill out the Direct Fax Cover Sheet clearly and accurately.
- Copy the front and back of all application pages.
- Fax your application pages in the proper sequence.
- Fax the application pages to the correct fax number.

For **Today's Options** the correct sequence of enrollment pages is as follows:

1) Cover Sheet
2) Enrollment Form (in proper page order)
3) ACH Form
4) Any additional documentation

For **Prescription Pathway** the correct sequence of enrollment pages is as follows:

1) Cover Sheet
2) Enrollment Form (in proper page order)
3) ACH Form
4) Any additional documentation

Each Cover Sheet submitted (one Cover Sheet may contain up to five enrollment forms) will result in one confirmation e-mail or phone call to your office within approximately two hours. Each enrollment receives its own confirmation number. This time period allows Fax Processors to receive, validate and handle your enrollments. If the number of pages indicated on your Cover Sheet does not correspond with the total received at the Enrollment Processing Center, you will receive a message indicating the situation. You may correct the error through one of the two following actions:

1) Send in only the identified missing pages of your original fax by checking the box located in the upper right corner of the Direct Fax Cover Sheet. This alerts the Fax Processor that you are submitting a correction to your original fax. You must also provide the confirmation number associated with your original fax in the correction box to help the Fax Processor identify and locate the fax in question. Corrections should be faxed to the same fax number provided on the Cover Sheet.

2) You may choose to resend the entire fax after first making arrangements with a Fax Processor to avoid duplication.

NOTE: The Direct Fax Program must abide by strict CMS regulations regarding processing and turnaround times. Therefore, your responsiveness to confirmation issues is crucial. If you receive a confirmation advising that your fax was rejected due to clarity issues, missing pages, etc., you must resolve these issues within a 24-hour time frame, or these faxes may be forwarded for processing and treated as an incomplete enrollment. This slows down the enrollment process and negatively impacts you, your commission and your client!

To avoid confusion and the possibility of duplication, we prefer that you speak with a Fax Processor if you are aware of a fax error or failed transmission on your end.

Keep copies of each enrollment and confirmations to serve as proof of enrollment submission. In the event of a system error, you might be asked to provide these documents.

Direct Fax is the quickest way to submit your clients' enrollment forms and generate commissions. Get with the Direct Fax program and fax in your business today!

Direct Fax Hours of Operation: 24 hours a day/seven days a week
Agent Info Line Hours of Operation: 9 a.m. – 6 p.m. EST, Monday – Friday

PHOTOCOPY THIS FOR YOUR USE

TODAY'S OPTIONS®

Complete this box if this is a replacement page for an original Direct Fax or a complete re-fax.

Confirmation # of Fax: _____

_____Total replacement pages sent (include cover sheet)

_____This is a complete replacement fax

DIRECT FAX TRANSMITTAL COVER SHEET

Note:

- If this is the first time you are submitting an enrollment form via Direct Fax, please check the appropriate box below and complete the agent information section to qualify as a Direct Fax User. Fax ONLY this Cover Sheet to the number provided below and a test confirmation will be provided to verify your enrollment as a Direct Fax User. Upon receipt of this confirmation, you may begin submitting enrollment forms.
- Multiple enrollments (a maximum of five) submitted on a single Cover Sheet must be written by the same agent.
- A Direct Fax confirmation number will be provided via e-mail or phone within approximately two hours for faxes received by 5 p.m. EST. Faxes received after 5 p.m. EST will be confirmed the following business day by 10 a.m. EST. If no confirmation is received, you may call 1-866-856-5849 or e-mail directfax@patni.com for Direct Fax receipt status.

FIRST TIME DIRECT FAX USERS: Please check this box, complete the following agent information and fax only this form to the number listed below (required to enroll). ☐

Fax ONLY Today's Options enrollment forms to: . . . . . Fax: 1-866-903-8235

Agent Name: _____ **Agent Number:** _____

Phone: _____ **Fax:** _____

E-mail Address: _____

Total Pages Faxed (including cover sheet): _____ **Date:**_____

Forms Sequence: 1) Direct Fax Transmittal Cover Sheet **2)** Complete Enrollment Form
3) ACH Form **4)** Any other documentation

	Applicant Name	Applicant HIC Number
1.		
2.		
3.		
4.		
5.		

NOTICE TO AGENT: Please retain all enrollment forms submitted through the Direct Fax Process until the member receives his or her Welcome Kit.

DO NOT MAIL THE ORIGINAL ENROLLMENT FORM!
For any correspondence other than a new enrollment form, please mail to the appropriate address:
Today's Options: Pyramid Life, P.O. Box 742528, Houston, TX 77274 or
American Progressive, P.O. Box 742648, Houston, TX 77274.

PHOTOCOPY THIS FOR YOUR USE

Complete this box if this is a replacement page for an original Direct Fax or a complete re-fax.

Confirmation # of Fax: _____

_____Total replacement pages sent (include cover sheet)

_____This is a complete replacement fax

DIRECT FAX TRANSMITTAL COVER SHEET

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FIRST TIME DIRECT FAX USERS: Please check this box, complete the following agent information and fax only this form to the number listed below (required to enroll). ☐

Fax ONLY Prescription Pathway enrollment forms to:. . . . Fax: 1-866-417-5194

Agent Name: _____ **Agent Number:** _____

Phone: _____ **Fax:** _____

E-mail Address: _____

Total Pages Faxed (including cover sheet): _____ **Date:** _____

Forms Sequence: 1) Direct Fax Transmittal Cover Sheet **2)** Complete Enrollment Form
3) ACH Form **4)** Any other documentation

	Applicant Name	Applicant HIC Number
1.		
2.		
3.		
4.		
5.		

NOTICE TO AGENT: Please retain all enrollment forms submitted through the Direct Fax Process until the member receives his or her Welcome Kit.

DO NOT MAIL THE ORIGINAL ENROLLMENT FORM!
For any correspondence other than a new enrollment form, please mail to the appropriate company:
Prescription Pathway: Pennsylvania Life, P.O. Box 1232, Pensacola, FL 32591 or
American Progressive, P.O. Box 1871, Pensacola, FL 32591.

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