



- May 2012, 5 Year Roadmap Script – Age Ins

Hello, may I speak to ___? My name is ___ and I am calling on behalf of Interamerican Medical Center.

We are your local Healthcare center located here in Hialeah.

At this time we have a special program for the residents in this area. This program is designed to deliver all the different preventive services that Medicare provides to you now that you are turning 65 and includes 22 different preventive services exams that you will have access to for free or with a minimal copayment.

Our records indicate that you may be eligible for Medicare this year and what we want to do is to provide you with a free 5 Year Roadmap to preventive services which will become your guide for the types of exams that you can get for free, and approximate dates you will be eligible for each one of them. This includes exams like cardiovascular screening, Bone Mass Measurement, Diabetes Screening and others; as I mentioned before it is a total of up to 22 different exams you are entitled to.

What we want to do is to schedule an appointment with you here at the Center, and for that we can pick you up at your house, and during your visit here, we will set up your 5 year roadmap to preventive services. Additionally, we will show you all the different benefits you will be entitled to once you are eligible for Medicare, including among others, free dental coverage, access to our activity center, and free beauty salon services.

May I ask what month you will be turning 65 this year? ___(Record answer.)

We can help you in one of two ways:

The first is we can schedule your appointment at the center at your convenience, and on that day, you come in, meet our Nurses, and get your 5 Year Roadmap. I recommend you this option because you are going to immediately know exactly what your benefits are.

*The second way is I can send you a document on the mail, called “**Your Guide to Preventive Services**”, and once you receive it, I can call you back and schedule your appointment.*

Which alternative do you prefer?

If first: Proceed to set up appointment:

PROCEED TO SET AN APPOINTMENT

Mr. / Mrs. ___ please allow me to verify your information.

1. Is your last name spelled ___ and your first name spelled ___?
2. Verify address.
3. Ask for alternate telephone number?
4. Do you have an **(or, Is Your)** email address?___
5. Are you driving in, or would you prefer for us to go and pick you up. Remember, free transportation to the doctor’s office is one of the first benefits you will be getting with the program.
6. We will have Mrs. _____ expecting you at the center on your visit day, and she will be your contact from then on.

If second: Ok Mr. _____ I will send you the booklet *Your Guide to Preventive Services*, and I will be calling you back to make sure you have received it, and to help you with scheduling your appointment at the center.

“FOLLOW-UP CALL”

Hello, may I speak to ___? This is ___ with InterAmerican Medical Center.

I spoke to you last week about your **“Guide to Preventive Services,”** and I am calling to make sure that you received the booklet. *Have you received in on the mail yet?*

If yes,

That’s great!

Did you review it?

Do you have any questions?

Now, Mr./Ms. ___, what I want to do is to:

1. Schedule your appointment at the center so that they can go over the book with you, and present you with the additional benefits you will be receiving including free dental coverage, free transportation, and access to our activity center.

1. Is that ok with you?

Do you prefer mornings or afternoons?

Great, I have ___:___ or ___:___ on ___ or ___.

PROCEED TO SET AN APPOINTMENT

Mr. / Mrs. ___ please allow me to verify your information.

2. Is your last name spelled ___ and your first name spelled ___?
3. Verify address.
4. Ask for alternate telephone number?
5. Do you have an **(or, Is Your)** email address? ___

If no,

You haven’t?

I apologize for the delay in getting your kit; let me check to see why you haven’t received the material?

You should be getting it any day now but you can also download the material by going to our Web site @ www.FINAMEDIC.com

I can have a representative bring you the booklet and explain to you all the benefits you are entitled to.

Would you like for me to schedule for one of our agents to take the booklet to you:

If yes: Proceed to set appointment.

If no:

Mr/Ms ___, I will be calling you next week to see if you received it?

I can also email the information to you. Would you like me to do that? *(If yes, confirm or get their email address.)*

(Note to TM: Record notes and schedule in CAM for next week followup.)
