AccuQuote Genworth Examiner Checklist

For these AQ Genworth account #95701 & 95683, check the procedures on the work order ticket. IF an application service is listed in the procedures, you must pick the application packet up from the applicant. If no application service is listed, it is not required for that particular applicant.

PROCESS

- ☐ You must have already completed the "EMSI U-Direct Exam Service Training Program" at emsi-training.com.
- ☐ Call applicant within 24 hrs of receipt and status every 48 hrs until scheduled, or preset is confirmed. If unable to schedule after 5 attempts, notify Partners Plus at 800-872-3674.
- ☐ If a Basic Paramed Exam is ordered, you must bring the paramed form. It will **not** be included in the application packet the applicant gives you.
- ☐ **Call applicant to confirm 24 hours before the appointment. IF the application service is listed on the work order ticket and the applicant does not have it at the time of the appointment, the applicant should note that in the box down below and sign.**

AT THE EXAM

- ☐ Arrive on time and keep preset appointments, even if applicant has not confirmed. If you are running late for any reason, call applicant immediately to inform them.
- ☐ Have applicant read and sign the HIV Consent form, if required for carrier and/or state. Then complete requirements listed on the work order ticket.
- ☐ Take measurements of height and weight with a metal measuring tape and scale. Have the applicant initial next to height and weight on the exam form.
- ☐ Occasionally an applicant may provide a check. Simply forward to branch with the rest of the paperwork.
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IF 'APPLICATION SERVICE' IS ON YOUR TICKET, APPLICANT MUST FILL OUT THIS SECTION
Dear Applicant: AccuQuote cannot start the underwriting process and you will not be able to obtain your free lab results if your signed application is not provided. Contact your agent with questions, or if you have not yet received your packet. Circle whether you are providing the application packet to the examiner: **YES** **NO** **If no, provide reason for refusal:** _____ _____ **Applicant Signature**
Examiner: Circle whether a check was picked up: **YES** **NO**

PAPERWORK Follow the mailing instructions closely. Misdirected paperwork is not tolerated.

- ☐ Application packet (if ordered), exam and this checklist must be imaged w/in 24 hours to avoid deductions. Originals go to your branch. **Never place an application packet in the kit.**
- ☐ Originals go to your branch. If applicant gives you a check, provide to your branch on TOP of the rest of the paperwork. They must see it so they can mail it to the carrier.

Note: Examiners are prohibited from procuring an insurance application, verifying signatures on applications, quoting premiums for insurance, discussing insurance coverages, or otherwise soliciting, negotiating, effecting, procuring, placing, writing, delivering, renewing or bind any insurance policy.