

AccuQuote U-Direct Examiner Checklist



For this account the examiner must collect a signed application from the 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.

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 which may include: Basic Paramed Exam, EKG, Blood, HOS, HIV Form, Senior Assessment or Amplified Services (height, weight, BPs, pulse)
- 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 with their application. It is okay to collect the check. Simply include it with the application packet.
- Collect the completed application and review for signatures. Below boxes must be completed.

Applicant Must Fill Out This Section Of The Checklist

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 to the examiner. You may contact your agent with any questions. Circle whether application was provided to the examiner: **YES NO**

If no, provide reason for refusal: _____

_____ **Applicant Signature**

Examiner: Circle whether a live check was picked up? **YES NO**

Follow the proper mailing instructions closely. Notice that ING has unique mailing instructions.

Mailing for all carriers <u>except</u> ING:	Mailing for ING exams <u>only</u> :
<ul style="list-style-type: none"> <input type="checkbox"/> Application, exam & this checklist must be imaged w/in 24 hours to avoid deductions. Originals go to your branch. <u>Never place application in the kit.</u> <input type="checkbox"/> If applicant gives you a live check, provide to your branch on TOP of the rest of the paperwork. They must see it so they can mail it to AccuQuote. 	<ul style="list-style-type: none"> <input type="checkbox"/> Copies of ING application packet, ING exam and this checklist must be imaged within 24 hrs, so provide copies to your branch ASAP. <input type="checkbox"/> Then ING exam paperwork (except for application & checks) are packaged in the kit for delivery to the lab. Exam paperwork in the kit. Checks/packets go to branch.)

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.