

# Examiner Checklist / National Brokerage U-Direct



lead and innovate

**This is a U-Direct Account and requires that the examiner bring an application packet to the appointment for obtaining signatures. This is a valuable customer and it is easy to complete every exam correctly by utilizing this checklist during your National Brokerage exams.**

## 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 to confirm the preset appointment. Go to the exam even if you can't reach the client to confirm the preset
- If any questions or concerns regarding this account, 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 signature pages that 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.
- Do not attempt to answer insurance related questions, direct the applicant to call (800) 377-6344 with any questions regarding the insurance policy or signature pages.
- Have applicant read and sign the HIV Consent form, if required for carrier and/or state. Then complete exam 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 with their application. Accept and include it with the application packet and follow mailing instructions.
- Collect the application signature pages and review for signatures. Circle yes or no in the box below for each of the questions and have the applicant sign.
- Occasionally you will need to verify applicant signature on Auto Draft Payment Documents in the Application Packet. If not signed and applicant refused; circle yes or no in the boxes below and have applicant sign.

### Circle One For Each Question

YES NO Application Signature Page(s) was picked up

YES NO Live check was picked up

YES NO Auto Draft Payment signed

**Applicant Signature**

Comment:

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

- Copies of the application signature pages, exam paperwork and this checklist need to be ECHO faxed, or provided to your branch with in 24 hours of completion. **Never place application packet in the kit.**
- Original application packet, exam paperwork and this checklist must be sent regular mail to Partners Plus at:  
**EMSI ATTN: Kimberli Hyché 8300 Central Park Dr – Waco, TX 76712**

Note: NC and Ohio 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.