

Phone Health Interview Procedures:

How can I make this process quick and to the point?

You can contact *Resource Brokerage, LTC* and we will “hand hold” the process for you. We do this in several ways. We can conference call the client directly with the vendor. We can contact the client as an extension of you and facilitate the process through to a successful interview. Let us take this off your plate so you can focus on your sales.

What is a health interview?

It is interview that includes questions about your client’s health, medications, and daily activities. They ask questions pertaining to hobbies, chores, and meal preparation. Every phone health interview is designed to evaluate memory through a cognitive review. This portion is usually conducted at the end of the interview. All results are kept confidential.

Why is an interview needed with long-term care insurance?

There are factors that determine when a telephone or in person-to-person interview is necessary. The answers on the application, the length of time between the last Doctor’s visit, your client’s age, and findings in any medical records are a few items that determine whether a phone interview is needed.

Who performs the interview?

A licensed nurse or person who holds a degree in social work will conduct the interview. Most licensed people are represented by a nationwide network of professional agencies.

When will you be called?

The hours that vendors usually try to contact clients are between 8:00am-8:00pm. Usually the application asks you what time is most convenient. The vendor will make every effort to contact you at the time you designate.

How long with the interview take?

Your client should plan for 20 minutes.

What if my client is having trouble?

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