**Enrollment Appointment Follow-up Call**

**Key Points**

1. Introduce yourself and say what organization you’re with.
* You may need to remind them of what you do and the date you helped them sign-up for health insurance.
1. Ask them how their insurance is going
2. Ask them if they understand how their plan works
3. Ask them if they have a primary care doctor and if they’ve made an appointment for their first yearly check-up
4. Ask them if they need any more help with their insurance
5. Explain to them that you’re making appointments with people so they can learn about their new health insurance and how to get the most out of it, because after all they’re paying for it so they might as well reap all the benefits!
6. If they’re interested, setup an appointment.

**When scheduling an appointment, make sure to tell them:**

* To bring their insurance card
* To bring their Marketplace username and password
* Where we’re located