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Compliance FAQs for Doctors, Clinics, and Medical Centers

1. Since the Medical Center is the one who called the patient, and they were not calling for “insurance” purposes, is it ok for them to give the patients name to the agent, or must the potential beneficiary call the agent?
 - a. The Medical Center would not be permitted to give the patient’s name/contact information to the agent. The potential beneficiary would need to make the initial contact with the agent. The Medical Center can provide the potential beneficiary with contact information of the agent.
2. If an allegation were to come in, what information would we need/want from the medical center?
 - a. This would not be applicable if the consumer is the one who initiates the contact with the agent.
3. What else should we clarify or need to know?
 - a. Providers and Medical Centers are not permitted to conduct any marketing activities on behalf of an agent; however, they are permitted to provide contact information for agents and agencies who can assist the consumer with finding an insurance plan.