

TIPS FOR TELEPHONIC ENROLLMENT



Many Medicare insurance carriers have made it easier to sell their products telephonically. Here are a few tips and tools to help you continue to conduct business as usual.

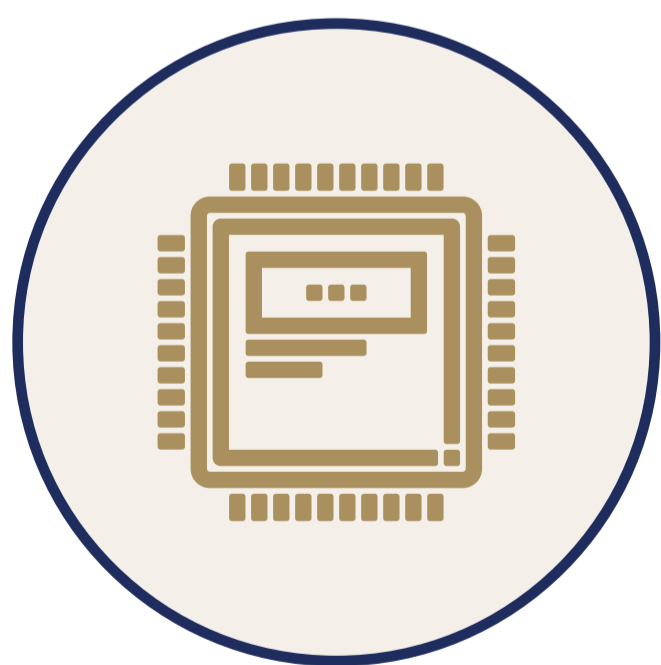


USE ONLINE QUOTING AND ENROLLMENT TOOLS

Many Medicare Advantage and Prescription Drug Plan carriers offer approved online enrollment tools, making it easy to export quotes as PDFs or share quote information directly with clients.

CONTRACT WITH CARRIERS SUPPORTING TELEPHONIC ENROLLMENTS

Some Medicare Advantage, PDP and Medicare Supplement carriers currently allow for telephonic enrollments, and others who typically don't are starting to make exceptions. For an up-to-date list or to become contracted with carriers that allow for telephonic enrollments, please contact your marketer.



UTILIZE TECHNOLOGY

Screen sharing technology is a great way to present information to clients when you can't be there in person. Here are a few screen sharing tools to consider:

- **Screenleap:** From \$15 per month
- **Zoom:** From \$13.33 per month, free option
- **Skype:** Included with Office 365
- **GoTo Meeting:** From \$14 per month
- **Google Meet:** From \$6 per month, free option

Federal and state privacy and telemarketing laws continue to remain in effect. Outbound calls or texts must comply with federal, state and local restrictions and guidelines, including CMS requirements for 1:1 consent. Calls and texts are prohibited to any numbers on state and federal do-not-call lists, and telemarketers must record, maintain and honor internal do-not-call lists. The use of auto-dialers to call or text must be limited to recipients who provided prior express written consent to be contacted about the products. Telemarketers are not allowed to make unsolicited calls to any person under a declared state of emergency. Callers must disclose the identity of the seller, inform that the purpose is to sell goods or services, and explain the nature of the goods or services being offered.