

Guidance on Recording Sales Appointments

Clover is aware of, and has confirmed, CMS' ruling with regard to the recording of telephonic and/or virtual Medicare sales appointments and applications.

As always, Clover encourages in-person appointments as a best practice for sales presentations to Medicare beneficiaries.

If a telephonic or virtual (eg - Zoom) appointment is unavoidable, it is Clover's position that the secure recording, storage, retention (10 years), and provision to Clover or CMS upon request is the responsibility of the agent.

Additionally, information provided as part of the sales appointment and application is considered PHI and must be stored securely. Any occasion in which a recorded appointment and application is requested to be shared with Clover or CMS must also utilize secure transmission of recording.

