

Telephonic Assisted Enrollment

Clover Health's Telephonic Assisted Enrollment (TAE) process is intended to be used to capture a client's voice signature attesting to commitment to enroll when an agent is unable to meet face-to-face with a client and/or client has no access to electronic enrollment options.

Overview of Process

1. Agent verbally captures Scope of Appointment (SOA) confirmation, conducts compliant sales presentation and completes, to the point of client signature, a paper or online enrollment with client over the phone.
2. At the point in the process of capturing a client's signature to finalize enrollment, the agent initiates a 3-way call with Clover Health's Telephonic Assisted Enrollment team.
Agent must remain on the line with the TAE representative and client.
3. TAE representative utilizes recorded phone line and asks a series of questions (see *Appendix* for questions) of both agent and client, including confirmation of SOA and client's intent to enroll in Clover Health plan.
4. TAE representative provides a voice signature code (format will be rep's initials/date/time, eg: ar/092921/3:32) that the agent enters on the client signature line of the SOA and the enrollment application in lieu of client's 'wet' or electronic signature.
5. Agent submits completed enrollment application - paper or online - to Clover Health.

When all required information is submitted properly, the agent completing and submitting the application gets credit for the enrollment.

Clover Health's Telephonic Assisted Enrollment Representatives are available to take calls

Monday - Sunday

8am - 8pm in all time zones

855-993-5636

Note: All calls are recorded.

APPENDIX: Telephonic Assisted Enrollment Confirmation Questions

To Agent of Record:

- ❖ Is your client on the phone with you today? (If the answer is 'no', must disconnect and return the call with the client on the phone.)
- ❖ What is your name (please spell)?
- ❖ What is your NPN (National Producer Number)?
- ❖ Did you review the SOA with your client? (If the answer is 'no', must disconnect and return the call once reviewed.)
- ❖ Please say and spell your client's name.
- ❖ Please provide client's Medicare number (MBI/Medicare Beneficiary Identifier - located on their red, white and blue Medicare card)
- ❖ Please advise of the Clover Health plan in which you're enrolling your client today.
- ❖ Please provide County, Effective Date and Premium of plan.

To Client:

- ❖ Did your agent read and explain the SOA and get your permission to present Clover Health Medicare Advantage plans with you today?
- ❖ Please confirm your intent to enroll with Clover Health plan _____ in _____ county, effective on _____ date with a monthly premium of \$_____. Is this correct?

TAE rep will then provide a voice signature code (format will be rep's initials/date/time, eg: ar/092921/3:32) to be used in client signature fields of SOA and enrollment application.