

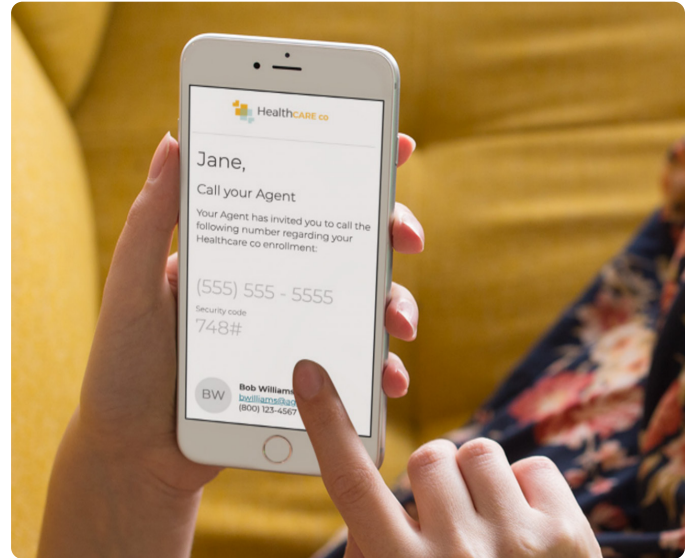
Telephonic Enrollment for Agents

Use telephonic enrollment when face-to-face is not an option. Allow agents to compliantly record calls while submitting enrollments on behalf of beneficiaries.

Telephonic Enrollment provides agents with yet another tool to efficiently submit enrollments.

Agents can choose to record a conversation by sending an email or text invite to the beneficiary.

Once connected, agents can proceed to the enrollment application with the recording in progress. Once the call is finished, the recording is available in the member profile for ADMIN users to access and review.



Here is the seamless process for recording calls:

1

Agents send a text or email invitation to the beneficiary with a phone number unique to the agent, along with a security code

2

Beneficiary will then call the agent, accept the call as being recorded and enter the security code

3

Call recording information is clearly displayed in the sidebar on the right-hand side of the screen