

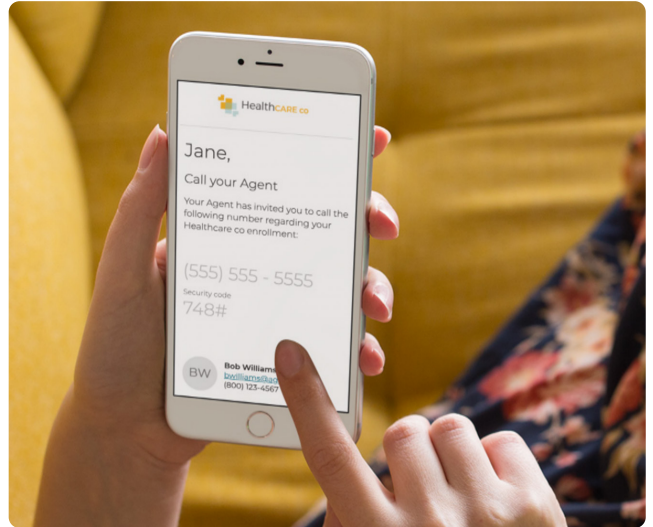
# Agent Call Recording

Use Agent Call Recording to record the **Shopping experience, Plan comparisons, Scope of Appointments AND Enrollments.**

Agents can initiate a recorded call through PlanCompare ONE. Alternatively, for enrollment-only appointments, an agent can send the beneficiary an email or text invite to call the agent to complete the enrollment.

Once connected, agents can proceed as they normally would with their customer. 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

**For Shopping, Plan Comparisons and SOA:** Agent can call the beneficiary for their scheduled appointment.

**For Enrollment ONLY interactions:** Agent sends link via text or email to the beneficiary from the broker module to initiate a call.

2

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

3

Agent takes beneficiary through Scope of Appointment, Shopping and Enrollment. Recordings are linked with beneficiary profile for ADMIN to retrieve and review.

Reach out today to schedule a demo.