Field Communication

Telephonic Enrollment Process

Products Impacted:

- **AdvantraFreedom (PFFS)**
- **AdvantraRx (PDP)**
- **Advantra (MAPD)**

In an effort to provide sales agents with convenient ways to accurately enroll beneficiaries, we are pleased to provide this Step-by-Step instruction on our Telephonic Enrollment Process.

This will also help you meet the requirement of submitting the enrollment application to us for processing within 48 hours!

If you have any questions, please contact the Broker Services Unit at 1-866-714-9301 Monday – Friday 8:00 a.m. – 8:00 p.m. ET

Instructions

1. Once you have completed the sales presentation and obtain the beneficiary's agreement and desire to enroll in one of Coventry's Medicare products you may begin the telephonic enrollment process.
2. Although no signature is required on the application for telephonic enrollment, we do encourage that each beneficiary or authorized representative complete the application so that all of the information is readily available when speaking on the phone with a call center representative.
3. The beneficiary or authorized representative will then dial the dedicated telephonic enrollment line:

1-866-520-4959

4. The telephone representative will speak only with the beneficiary or member's authorized representative to complete the application.
5. The broker/agent shall not intervene or participate in the recorded portion of the telephonic enrollment.

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Telephonic Enrollment Process continued

6. Once the telephone call center representative obtains permission to record the call, he/she will speak with the beneficiary or authorized representative, verify that the beneficiary or authorized representative has initiated the telephone call and complete the enrollment application.
7. Once the application is complete, the call center representative will read all required terms, conditions and disclosures of enrollment to the beneficiary or authorized representative **verbatim** - specific to each product.
8. The beneficiary will be asked to acknowledge with a clear "Yes" that they understand the terms of enrollment.
9. The call center representative will then ask the beneficiary or authorized representative for their place of birth as verification of his/her identity.
10. Finally, the call center representative will ask for the broker's ID and payee ID to give credit to the correct agent/broker for commission purposes.
11. Please note the function of the telephone representative (non-licensed) is to gather the information necessary to complete the enrollment application and is not allowed to discuss features or benefits of the program or to answer questions about the program.

Reminder:

- Payment of commission for telephonic enrollments is contingent upon verification of the agent's completed in-person sales presentation. Verification is obtained during the telephonic enrollment process.