



LEAN Voice Signature

Job Aid



Table of Contents

LEAN Voice Signature	3
<i>Overview.....</i>	<i>3</i>
<i>Conference Call / 3-Way Call.....</i>	<i>3</i>
<i>Voice Signature Enrollment Application.....</i>	<i>5</i>



LEAN Voice Signature

Overview

For those consumers who do not want to meet in person or have limited internet access, you can use LEAN's Voice Signature to complete the enrollment application by telephone. Unlike remote signature, the consumer is not required to have an email address.

You must have a Scope of Appointment (SOA) in accordance with the CMS 48-hour rule for all marketing and sales appointments. If you do not have an SOA in compliance with the 48-hour rule, the SOA can no longer be taken verbally in LEAN except for:

- The last four days during a valid election period for the consumer.
- Inbound consumer-initiated calls.

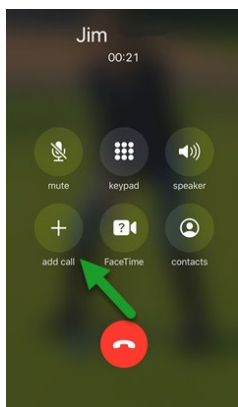
Note: See your Agent Guide (starting at page 56) or the Sales Policy Scope of Appointment job aid for more information on SOA rules.

Conference Call / 3-Way Call

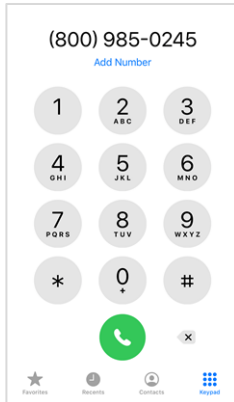
Before you start, make sure you can do a conference call or 3-way call with the consumer and phone recording system. You and the consumer must have clear lines and be easily heard in the recording.

Below is an example of how to set up a conference call or 3-way call with the consumer and phone recording system using an Apple iPhone, that is on the ATT system. While your device and carrier may appear slightly different, the process is similar between devices and carriers that offer conference or 3-way calling.

1. Call the consumer. Once you have the consumer on the line and have completed the needs assessment, verified all physicians, specialists, medications, and all other pre-enrollment steps, it's time to initiate the call to the Voice Signature process. With the consumer still on the call, press **add call**.

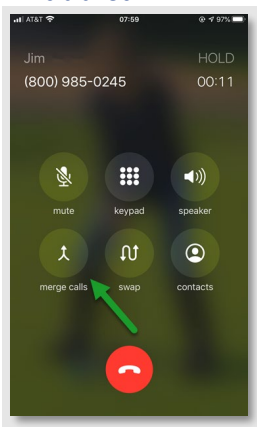


2. On the keypad, dial **800-985-0245** and wait for the system to answer your call.

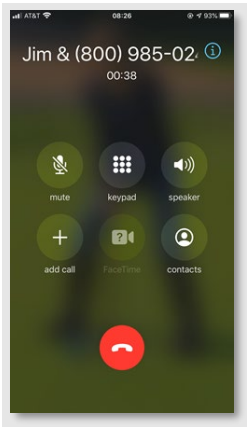


3. When the Voice Signature system answers the call, you'll hear the introductory welcome message and directions to enter your writing ID and press #. If your writing ID includes letters, omit those letters when keying in your writing ID and input the numbers only. Once you press #, the system will begin recording.

4. With the consumer on HOLD, press **merge calls**. This icon is in the same location as **add call**.



5. Once you've pressed **merge calls**, both you and the consumer will be able to communicate with the Voice Signature recording system.



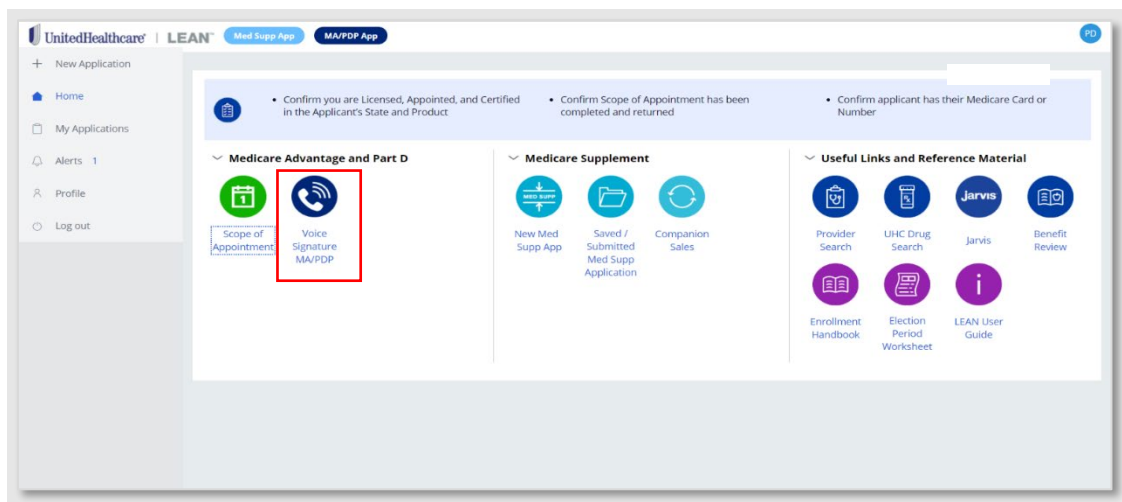
When the enrollment is complete, the Voice Signature recording will end, and the Voice Signature recording system will disconnect. You will still be connected to the consumer.

For more information on how to set up a conference call or 3-way call on a Samsung device, please click [here](#).

For more information on how to set up a conference call or 3-way call on an Apple device, please click [here](#).

Voice Signature Enrollment Application

1. To start the Voice Signature Application, click **Voice Signature MA/PDP** on the LEAN home page.



A Voice Signature call must be completed in its entirety. If a call is interrupted, a new call will need to be made and a new enrollment filled out.

IMPORTANT: Call into the provided toll-free number prior to starting the enrollment application. Failure to do so will result in an incomplete application. For assistance with setting up a three-way call with your consumer, follow the previous instructions outlined in the Conference Call/ 3-Way Call section of this guide. If you require additional assistance, please contact your carrier for device/carrier specific details.

2. Once the Voice Signature instructions populate, click on the **New Application** option in the bottom right.



Voice Signature Instructions

Please note:
Confirm you are Licensed, Appointed, and Certified in the Applicant's State and Product
Please confirm you obtained a Scope of Appointment, at least 48 hours in advance unless an exception applies, prior to recording this enrollment.
For more information on the 48-hour waiting period, please see the Agent Guide in the Knowledge Center on Jarvis.

Voice Signature Instructions:
Be sure the applicant is on the line with you before calling and has agreed to have this application voice recorded.

1. Call this toll-free number: 1-800-985-0245
2. Enter your Writing ID (numbers only) and press "#". The voice recording will begin after you enter your Writing ID.
 - a. **This is NOT a training or testing environment. Please DO NOT initiate a voice recording unless you intend to submit an application.**
 - b. **Any voice recording initiated will be submitted as an active application.**
3. Click "New Application" button if you are ready to begin the application. You are expected to read the enrollment contents to the applicant.
4. When you have completed the enrollment press "#" and you will receive a confirmation number. Enter that number on the Signature page of the enrollment before you submit the Voice Signature enrollment.

Viewing Submitted Voice Signature Enrollments:
If you want to view any Enrollments submitted via Voice Signature you will need to look in the Submitted tab of the My Applications page.

Close New Application

NOTE: *There is no practice environment for the Voice Signature process. Any voice recording initiated will be submitted as an active application so don't start the Voice Signature process until you are ready to submit a live application.*

3. **There is not a script to follow. All questions and disclaimers displayed on the screen must be read word-for-word to the consumer during the recording. Agent Notes do not need to be read to the consumer.**

Continue answering the questions and providing the required information. All items with asterisks must be answered to complete the application and the appropriate check box marked. Continue clicking on the button at the bottom of each page to advance to the next screen.

If a consumer does not provide their permission to record this enrollment, you must stop the process and enroll the member by another means.

4. The screens on the Voice Signature process are like the screens you are used to seeing on the LEAN MA/PDP Application. On the Medicare Information screen, you will need to ask the consumer to state their Medicare Beneficiary Identifier (MBI) one time during this recorded process.



1. Medicare info 2. Applicant 3. Product / Plan 4. Questionnaire 5. Payment 6. Signature

MEDICARE HEALTH INSURANCE CARD INFORMATION

First name * Middle name Last name *

First name Middle name Last name

Medicare number (MBI) * Sex *

Ex: 1EG4TE5MK72 Select... ▾

Customer is entitled to

Hospital (Part A) effective date Medical (Part B) effective date

-- ▾ 1 ▾ -- ▾ -- ▾ 1 ▾ -- ▾

Save Continue

Continue speaking to the consumer and providing the required information on the LEAN pages. A **Yes** answer may open other fields that need to be completed. While not a required field, please enter the consumer's primary phone number in the Contact Information.

Take note on the **Applicant Page** that the email will be a required field, but the consumer can opt-out if they do not want to receive email correspondence or if they do not have an email address. To opt-out, select the box for the consumer to receive hard copies of required materials.

Contact information

Primary phone Alternate phone E-mail address *

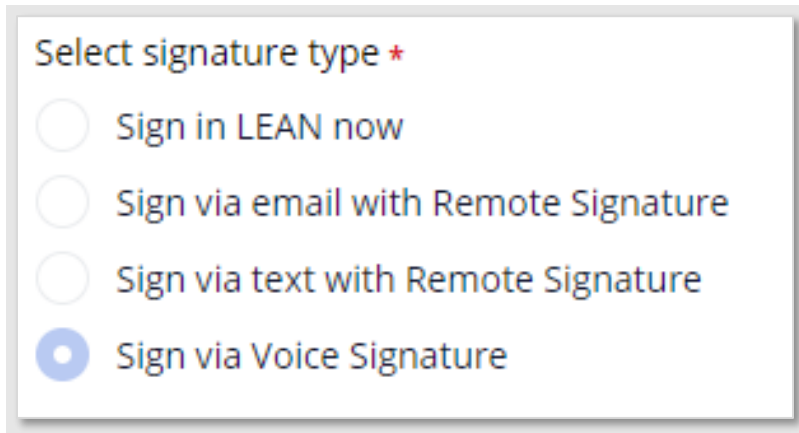
0000000000 0000000000 myname@email.com

Providing the email address above enrolls you in paperless delivery for some of your plan communications.
 You will get many of your required plan communications delivered electronically. We will send you an email when new communications (For example: Explanation of Benefits or the Annual Notice of Changes) are available online. You can access these communications through any device such as a computer, tablet, or mobile phone.

If you would rather have hard copies of required materials mailed to you, please check here.
 Instead of paperless delivery, we will mail you hard copies of required materials. Please note that some communications are very large and may not fit in all mailboxes. You can change your preference for delivery at any time.



The last page of the Voice Signature application is the Signature page. The signature type will default to **Sign via Voice Signature** which will be the correct and only option available.

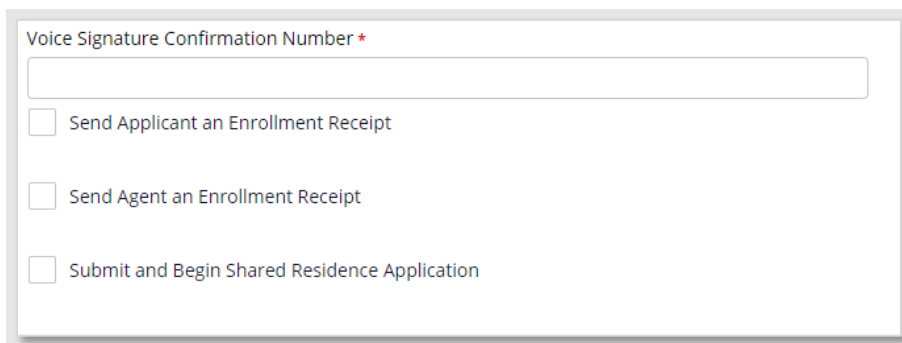


Select signature type *

- Sign in LEAN now
- Sign via email with Remote Signature
- Sign via text with Remote Signature
- Sign via Voice Signature

Once you read each of the Statement of Understanding statements to the consumer, ask ***Do you understand and agree to the information we've discussed during the enrollment today?*** If the Consumer replies Yes on the signature page, press # on your phone keypad.

You will receive a confirmation number verbally from the recording. Enter that number into the **Voice Signature Confirmation Number** field.



Voice Signature Confirmation Number *

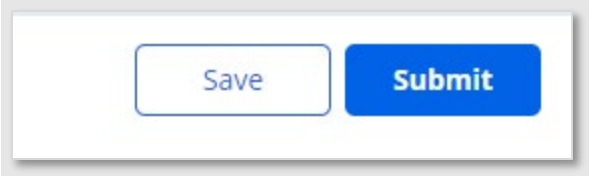
 Send Applicant an Enrollment Receipt
 Send Agent an Enrollment Receipt
 Submit and Begin Shared Residence Application

If you need the number repeated, you can press 1 on your keypad to have the Confirmation number repeated up to three times. If you do not press 1 to have the number repeated, the call will end.

You should make note of the confirmation number on a log or paper Scope of Appointment making sure to capture the name of the consumer, the date and time, the consumer's address and phone number, and the date of the appointment.

Lastly, click **Submit** at the bottom right of the page.

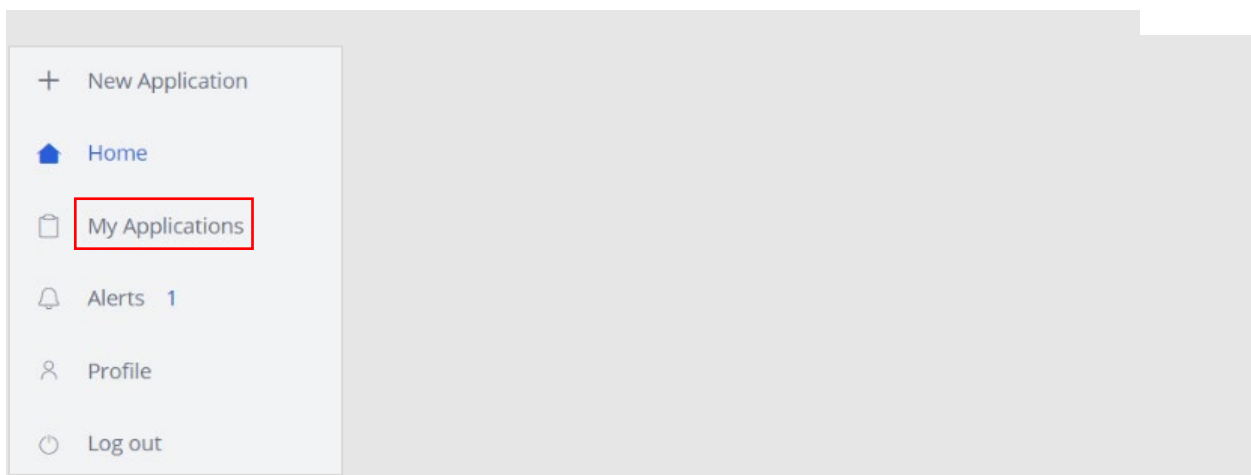




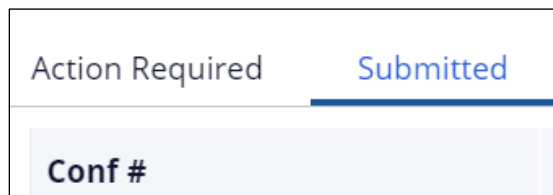
Click **Start HA** to immediately begin a Health Assessment (HA) or you can start the HA from the **My Applications** page of LEAN. The Health Assessment will not be recorded.

For more information on completing the Health Assessment, please see the Health Assessment in LEAN job aid in Learning Lab > Content Library > Health Assessment.

To find your completed Voice Signature applications, click on **My Applications** in LEAN.



Completed applications will be under the Submitted tab.



If you have questions, please call the Producer Help Desk (PHD) at 888-381-8581.