

SCAN Telephonic Confirmation of Prospect Intent to Enroll

SCAN's Sales Leadership worked with our Enrollment Department to find a NEW way for you to enroll clients during the temporary COVID-19 health crisis. We've created a telephonic process that includes a recorded confirmation of your clients intention to enroll in a SCAN plan. Carefully read the attached instructions. Your NEW paper enrollment process is called:

SCAN's Telephonic Confirmation of Prospect Intent to Enroll

This enrollment option allows an agent to complete an enrollment without a “wet” signature from their client by calling a recorded phone line and having their client confirm their intention to enroll. This option is only available when enrolling a prospective member who has no access to a face-to-face or on-line, electronic alternative.

Overview of Process:

- Agent is not able to meet face-to-face with prospect and client has no access to electronic option
- Agent verbally captures SOA and conducts compliant sales presentation over the phone
- Agent completes a paper enrollment with prospect on the phone line
- At point of sale when prospect consents to finalizing enrollment, agent initiates a 3-way call with SCAN's recorded phone line
- Agent connects prospect with SCAN's Telephonic Confirmation representative and stays on the line
- Telephonic Confirmation representative utilizes recorded phone line and confirms SOA and prospects intent to enroll
- Telephonic Confirmation representative provides “code” which agent enters on the enrollee signature line of enrollment form and the Scope of Appointment (SOA)
- Agent submits completed enrollment form to SCAN's enrollment department

SCAN's Telephonic Confirmation Representatives are available to take calls
Monday–Friday from 8:00 am–5:00 pm (PST).

Note: All calls are recorded.
Call **855-662-7226** to get started.

What is Telephonic Confirmation of Prospect Intent to Enroll?

A phone confirmation is a phone interview that agents and applicants must complete together in order for SCAN to process their enrollment application and insure that the submitting agent is credited for the application. The phone confirmation acts as an electronic signature and verifies the prospective members' intent to enroll with SCAN Health Plan.

During the phone verification, the agent will receive a confirmation number that must be included on the signature line of the paper application and on the SOA in lieu of a “wet” signature before submitting.

How to Complete a Telephonic Confirmation of Prospect Intent to Enroll

1. If your client is unable or un-willing to meet face to face and has no on-line ability to enroll, speak with them over the phone
 - a. Complete the sales presentation as usual.
 - b. Fill out the paper application while speaking with your client.
2. Conduct a Phone Confirmation
 - a. While still on the phone with your client, use your cell phone to conference in and call SCAN's NEW Telephonic Confirmation of Intent to Enroll phone line at 855-662-7226.
 - b. Both you and your prospect will be asked a series of questions. Once all questions are answered you will be given a confirmation code which **MUST** be written on the enrollee signature line of the paper application.
3. Submit the Application
 - a. Paper Application (**preferred method**)
 - i. Ensure the confirmation code is written on the signature line or the application will be considered incomplete.
 - ii. Fax or Mail completed applications to the SCAN enrollment department as usual (24-hour time period applies).

Enrollment Fax Numbers:

866 951 6318
 866 951 0712
 562 308 3626
 866 951 0713
 562 308 3627

Mailing Address:

SCAN Health Plan
 Enrollment Department
 3800 Kilroy Airport Way, Suite 100
 Long Beach, CA 90806

b. Electronic Enrollment

- i. If you choose to submit your application through SCAN Cubed Electronic Enrollment, you must follow the instructions below. *Reminder: submit paper applications to SCAN with the confirmation code written on the applicants signature line within 24 hours and retain a copy for yourself.*

How was this application completed?
 * Required

Telephonic Enrollment

Face to Face Paper Enrollment

Face to Face Electronic Enrollment

NOTE: If your enrollment was processed by calling the Telephonic Confirmation of Prospect Intent to Enroll phone line, you **MUST** select Telephonic Enrollment radio dial button at the end of the Electronic Enrollment process.

c. Please follow your agency's instructions for submitting the application to SCAN Health Plan.

Phone Confirmation Questions you and your client will be asked:

- Broker
 - Broker Name
 - NPN (National Producer Number)
 - Client Name
 - MBI# (Medicare Beneficiary Identifier)
 - SCAN Plan, County, Effective Date and Premium
- Prospect
 - Intent to enroll with SCAN
 - Confirm SCAN Plan, County, Effective Date and Premium

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

Electronic Signature Enrollment Script

SCAN Rep: Thank you for calling SCAN Health Plan my name is _____ to whom do I have the pleasure of speaking?

Broker: My name is _____ and I would like to confirm my clients' intent to enroll with SCAN.

SCAN Rep: Great! This call should only take a few minutes. I have a few questions for you and your client. Are you ready?

- a. Is your client on the phone today?
 - I. No – Please call back with your client on the call so I can confirm their intent to enroll with SCAN. This is required for enrollment purposes.
 - II. Yes- Continue with the questions below.
- b. What is your Broker Agent National Producer Number (NPN)?
- c. The spelling of your name?
- d. Did you review the Scope of Appointment (SOA) with your client?
 - I. No – Please call back with your client after reviewing the SOA.
 - II. Yes – Continue with the questions below.
- e. Please say and spell your clients name?
- f. Their Member Beneficiary Identifier Number (MBI)?
- g. The name of the SCAN Plan and County you are enrolling them in?
- h. Effective Date?
- i. And finally the premium of their new plan?

SCAN Rep: Thank you, May I speak with your client?

Broker: Yes – Continue with the questions below.

SCAN Rep: Hello Mrs./Mr. _____, my name is _____ and I will be confirming your desire to enroll with SCAN. I will be asking you a few questions that I will need you to confirm. Are you ready for me to proceed?

- a. Did your agent read and explain the Scope of Appointment form for you and get your permission to present SCAN's Medicare Advantage plans?
- b. Mrs./Mr. _____ today you are acknowledging that you would like to enroll into
 - I. The SCAN _____ plan in _____ County.
 - II. Your coverage will begin on _____.
 - III. And your monthly premium will be _____.
 - IV. Is this information correct?
- c. Client: Yes/No

SCAN Rep: Thank your Mrs./Mr. _____ we look forward to getting you enrolled with SCAN! I will now be providing your sales representative a confirmation number.

SCAN Rep: _____, you will now enter a confirmation number onto the signature line of the enrollment form. Are you ready for me to provide that number now?

Broker:

- I. No – wait for the agent to grab a pen and paper.
- II. Yes – read below...

SCAN Rep:

Your Confirmation # is _____ (initials, date, time).

- Would you repeat that confirmation number please?
- Please enter this confirmation number onto the signature line of the paper application and the SOA.
- Forward the application to your Agency in the same manner you usually utilize.
- Your agency will fax the enrollment application to SCAN's enrollment department.

SCAN Rep: Thank you for enrolling with SCAN Health Plan, have a Great Day!