




# Telephonic Presentation Job Aid


Humana allows career agents to conduct telephonic presentations to facilitate plan-to-plan (P2P) changes for current members only. This job aid describes the process for compliantly performing a telephonic presentation. This training material is intended to provide a general overview of agent conduct and compliance requirements. It does NOT attempt to cover all of the laws, regulations, rules, company policies, or other requirements applicable to you.

STEP	GUIDANCE
<p>1 <input type="checkbox"/></p>  <p>Start</p>	<p>A Humana or CarePlus member notifies their agent that they wish to make a P2P change. The agent offers to handle the presentation in-person or telephonically. The member selects a telephonic presentation.</p> <p>If the person is not a member of the agent’s book of business, then the agent must have express permission to telephonically contact the person. Acceptable methods:</p> <ul style="list-style-type: none"> <li>• Business Reply Card / Request for Future Contact Form</li> <li>• Message left by prospect to call them back to obtain plan information</li> <li>• Web response contact card initiated by the beneficiary/legal representative that specifies the agent may call</li> </ul>
<p>2 <input type="checkbox"/></p>  <p>SOA</p>	<p>An SOA is required for a telephonic presentation. The agent schedules a phone appointment and obtains a Scope of Appointment. SOA methods:</p> <ul style="list-style-type: none"> <li>• Interactive Voice Response (Humana: 866-945-4471; CarePlus: 888-685-8606)</li> <li>• Paper (mail in advance and receive back)</li> </ul>
<p>3 <input type="checkbox"/></p>  <p>Send material</p>	<p>The agent mails or, with prior permission, emails all required sales material. If the beneficiary agrees, the agent may send the materials using the Digital Marketing Materials link. The agent may also email PDF versions of the documents, including but not limited to:</p> <ul style="list-style-type: none"> <li>• <input type="checkbox"/> Link to the Humana or CarePlus sales presentation video, if prospect has indicated they can access internet to view. Viewing the video is OPTIONAL for current Humana members.</li> <li>• <input type="checkbox"/> All-in-One Enrollment Book, which also includes required Privacy policy disclosures</li> <li>• <input type="checkbox"/> Plan STAR rating</li> <li>• <input type="checkbox"/> Summary of Benefits, which also includes required Multi-Language insert</li> </ul> <p>The agent keeps a record of materials mailed/emailed and date. If electronic, retains a copy of all email correspondence and appointment related material.</p>

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<p><b>4</b> <input type="checkbox"/></p>  <p><i>Make the call and give presentation</i></p>	<ul style="list-style-type: none"> <li>• <input type="checkbox"/> Call the plan member at the scheduled time.</li> <li>• <input type="checkbox"/> Identify yourself and the purpose of your call.</li> <li>• <input type="checkbox"/> Ask the person to open the sales material you sent.</li> <li>• <input type="checkbox"/> Give the presentation, following these guidelines:             <ul style="list-style-type: none"> <li>a. <input type="checkbox"/> Video – optional for current Humana members, ask if they’ve watched it and possibly summarize main points</li> <li>b. <input type="checkbox"/> If video not shown, make sure to read required disclaimers (see CPL-006)</li> <li>c. <input type="checkbox"/> All-in-One Enrollment Book – give a guided tour of the information</li> <li>d. <input type="checkbox"/> Star rating – explain the plan’s star rating</li> <li>e. <input type="checkbox"/> Summary of Benefits – explain the booklet’s contents, including full disclosure of every plan benefit</li> <li>f. <input type="checkbox"/> Offer to look up medications</li> <li>g. <input type="checkbox"/> Select a primary care physician and look up others providers as requested</li> </ul> </li> <li>• <input type="checkbox"/> Invite the person to make the plan change.</li> <li>• <input type="checkbox"/> Confirm the beneficiaries primary residence. Agents must hold a license in each state they are selling.</li> </ul>
<p><b>5</b> <input type="checkbox"/></p>  <p><i>Complete an application</i></p>	<ul style="list-style-type: none"> <li>• <input type="checkbox"/> Use of the following enrollment methods after the telephonic presentation:             <ul style="list-style-type: none"> <li>a. <input type="checkbox"/> Invite the person to self-enroll through the ‘Enroll Now’ link in the Digital Materials (this action may <u>only</u> be completed by the beneficiary/legal representative)</li> <li>b. <input type="checkbox"/> FastApp (completed by agent and sent to beneficiary/legal representative for electronic signature)</li> <li>c. <input type="checkbox"/> Email a PDF of the enrollment application (written permission to email required)</li> <li>d. <input type="checkbox"/> Mail a paper application form</li> </ul> </li> <li>• <input type="checkbox"/> Facilitate completion of the enrollment form*             <ul style="list-style-type: none"> <li><input type="checkbox"/> If currently has Optional Supplemental Benefits and wants to keep, make sure to include on new application</li> </ul> </li> </ul>
<p><b>6</b> <input type="checkbox"/></p>  <p><i>Explain what happens next</i></p>	<ul style="list-style-type: none"> <li>• <input type="checkbox"/> Explain what happens next by referring to the corresponding page of the All-in-One Enrollment Book and explaining what will take place for the member</li> <li>• <input type="checkbox"/> Invite the person to complete the Caregiver PHI form and both of the Member Authorization Forms (Humana, Humana Pharmacy) <input type="checkbox"/> Congratulate for decision</li> </ul>

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STEP	GUIDANCE
<p data-bbox="164 304 256 352">7 <input type="checkbox"/></p>  <p data-bbox="131 468 293 535"><i>Update your records</i></p>	<ul data-bbox="386 300 896 405" style="list-style-type: none"><li data-bbox="386 300 896 331">• <input type="checkbox"/> Submit the application, if applicable</li><li data-bbox="386 333 896 365">• <input type="checkbox"/> Document notes and outcome</li><li data-bbox="386 367 896 405">• <input type="checkbox"/> Schedule follow up actions</li></ul>