



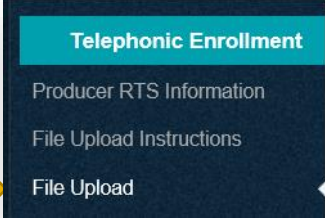

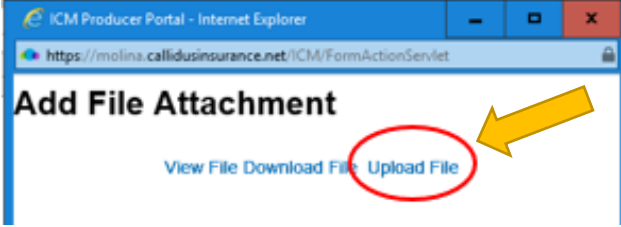

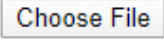
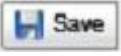
# Telephonic SOA & Enrollment Process for Brokers

**Introduction:** This job aid explains the steps for a Broker to engage Molina to perform a telephonic enrollment with a beneficiary, as an alternative to using the DRX Electronic Enrollment tool. When the Broker cannot meet with the beneficiary, he/she may use this process to enroll the beneficiary in a Molina Medicare plan. At the end of this document are Frequently Asked Questions (FAQs).

Steps for Telephonic Scope of Appointment (SOA)	
<b>Contact the Broker Support Unit</b>	<p><b>Note:</b> Only use this if you have not secured an SOA using another means.</p> <ol style="list-style-type: none"> <li>1. While on the phone with the beneficiary, perform a 3-way call with the Molina Broker Support Unit (844-885-3948), tell the coordinator you want to record a telephonic scope of appointment</li> <li>2. Broker Support Unit completes the recorded SOA</li> <li>3. A confirmation email will be sent to the broker.</li> </ol>

Steps for Telephonic Enrollment	
<b>Login to Callidus</b>	<ol style="list-style-type: none"> <li>1. Open an internet browser and enter this URL address: <a href="https://molina.callidusinsurance.net/ICM/">https://molina.callidusinsurance.net/ICM/</a></li> <li>2. Enter your Callidus user name and password and press <b>Login</b>. <b>This must be an agent login (cannot use an agency login).</b> <ol style="list-style-type: none"> <li>a. The User id is the agent's writing number (less any alpha characters) ex: 1234567</li> <li>b. Click <b>Forgot Password</b> if needed to recover password. Email will be sent to the email on file for the agent.</li> </ol> </li> <li>3. Select <b>Telephonic Enrollment</b> on the left navigation bar to open that menu</li> </ol>

<p><b>Upload the Completed Enrollment form</b></p>	<p>4. Upload the completed Telephonic Enrollment Form</p>	
	<p>1. Select <b>File Upload</b></p>	
	<p>2. Click </p>	
	<p>3. Click <b>Upload File</b></p>	
	<p>4. Click  or </p>	
	<p>5. Navigate to and select the file saved, click <b>Open</b></p>	
	<p>6. Click </p>	
	<p>i. The selected file will be displayed on the screen when the upload is complete. This may take a few seconds.</p>	
<p><b>Connect Beneficiary with Telephonic Enrollment</b></p>	<p>5. Now that the application is in the queue you have two options (<b>choose one</b>):</p> <p>a. <b>Option #1</b>- 3-way call with the beneficiary and the Molina Telephonic Enrollment team (866-714-8996) 8:00 AM-5:00 PM Pacific Time and stay on the line while they complete the enrollment.</p> <p><b>OR</b></p> <p>b. <b>Option #2</b> – Molina’s Telephonic Enrollment team will contact the beneficiary and complete the enrollment on behalf of the Broker.</p>	
<p><b>Confirmation email is sent</b></p>	<p>6. A confirmation email will be sent to the Broker informing them of the completed enrollment.</p>	


## How to Download and Use the Enrollment Form Template

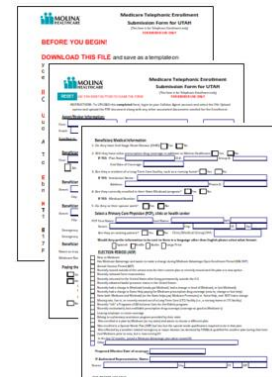
### Download and edit the Enrollment file from Callidus

**Before you begin, you must have a downloaded copy of the Telephonic Enrollment form for the beneficiary's state on your PC.** PDF file edits will **not** be saved until downloaded to our local machine. Save as a template on your local machine before filling it out. Edits can be saved before uploading a final copy for each client.

1. After logging on to Callidus, Select **Telephonic Enrollment** from the left navigation pane
2. Select the desired Enrollment Form template for the beneficiary's state



3. Click  to download the document to the PC to save the form template to your PC
  - a. Once stored, this can be used as a template for all enrollments for that state
4. Open the downloaded Enrollment form and complete all fields in the fillable PDF form (using Adobe Reader or another PDF editor).
5. Click **File > Save As**
  - a. Store on the PC with a name that refers to the beneficiary (ex: "Jones, Susan 6-1-2020 Telephonic Enrollment form)



**Note:** PDF Files with fillable field edits will **not** be saved if edited within a browser window. It must be edited within Adobe Reader or another PDF editor.

## Frequently Asked Questions (FAQ)

### **1. What happens during the Enrollment call by Molina Telephonic Enrollment team?**

- The Molina Telephonic Team member will call the beneficiary on a recorded line. They will:
  - verify the information provided
  - read necessary CMS disclosures
  - record the beneficiary's approval to enroll
- We recommend you prepare the beneficiary for the call from the Molina Telephonic Enrollment team if you do not have a 3-way call with the beneficiary & Molina Telephonic Enrollment team.

### **2. How long does the enrollment take?**

- This typically takes between 10 and 20 minutes.

### **3. What happens if Molina Telephonic Enrollment team cannot reach the Beneficiary, if the broker has chosen that option?**

- The Molina Telephonic Enrollment team will reach out to the beneficiary 3 times. If they fail to reach the beneficiary, the Broker Support Team will reach out to the broker to determine how to proceed.

### **4. What could prevent the enrollment from completing?**

- If the Molina Telephonic Enrollment team was unable to contact the beneficiary.
- If the beneficiary refuses to complete the enrollment.
- If the Broker is not Ready to Sell (RTS) in that state.

*NOTE: The Broker Support Unit will contact the broker to resolve any situation that prohibits the enrollment from being completed.*

### **5. What are the hours of the Molina Telephonic Enrollment team?**

- 8:00 AM – 5:00 PM Pacific Time, M-F.
- Phone number: 866-714-8996

### **6. Why am I unable to upload the file in Callidus?**

- If an Agency account was used to login to Callidus, the system will display an error when trying to save the file. The user must login using an agent account and try again.

**7. When is the month-end cut off for uploading enrollment forms?**

- Enrollment forms will be accepted up to, **noon pacific time of the last business day of the month** to allow enough time to complete the Telephonic Enrollment.

**8. How do I locate my Callidus user name?**

- The Molina writing number is your Callidus user ID. If you cannot remember your writing number, call the Broker Support Unit (866-440-9788) for assistance.

**9. What are all my options for submitting an enrollment to Molina?**

- DRX (Electronic Enrollment) in person or email
- Paper enrollment US postal mail or fax
- Telephonic Enrollment (see the instructions above)

**10. What are all my options for completing a Scope of Appointment (SOA)?**

- DRX in person or email
- Paper SOA, mailed or scanned and stored into DRX
- Telephonic SOA (see the instructions above)

**11. Can I use the Telephonic SOA with a paper application or DRX submitted application?**

- Yes, the Telephonic SOA can be used in conjunction with any of our enrollment methods. We recommend the broker keep a copy of the Telephonic SOA confirmation email for their records.