JarvisEnroll Voice Signature

This job aid walks you through the steps to follow when using the Voice Signature option in JarvisEnroll. For consumers who do not want to meet in person or with limited internet access, you can use Voice Signature to complete the enrollment application by telephone. Unlike email remote signature, the consumer is not required to have an email address.

A Scope of Appointment (SOA) can only be taken verbally in JarvisEnroll when an exception to the 48-hour rule applies:

- The last four days of a consumer's valid election period
- Consumer-initiated inbound call

When a 48-hour exception does not apply, you must have obtained the SOA at least 48 hours prior to the one-on-one marketing appointment.

Note: *See your Agent Guide or the Sales Policy Scope of Appointment job aid for more information on SOA rules.*

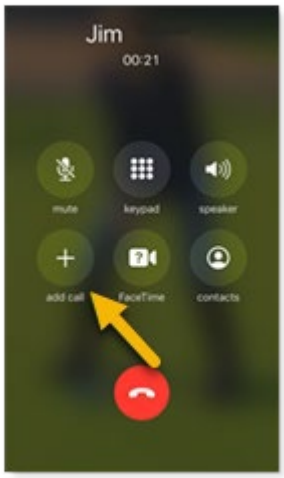
Conference Call / 3-Way Call

Before you start the voice signature process, 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

Dial the consumer. Once you have the consumer on the line and have completed the needs assessment, verified all providers, 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**.



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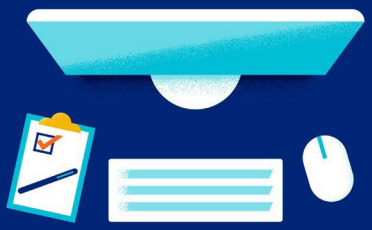
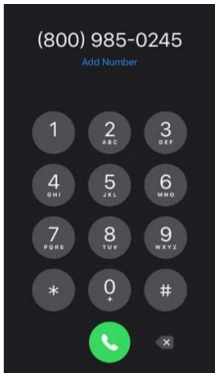


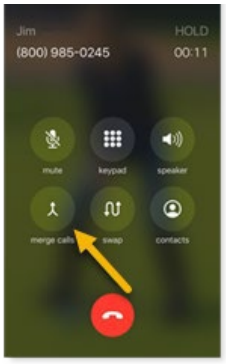
2 Call the Voice Signature System

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



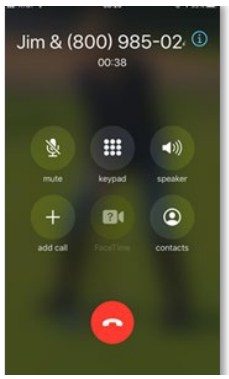
3 Merge the Calls

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



4 Complete the Call

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



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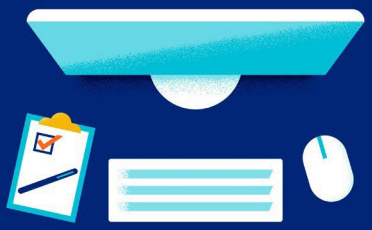


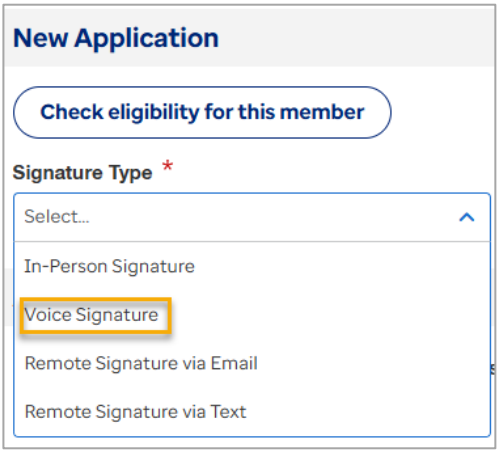
Voice Signature Enrollment Application

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.

1 Start the Application

To begin, select **Voice Signature** from the dropdown.



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

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.

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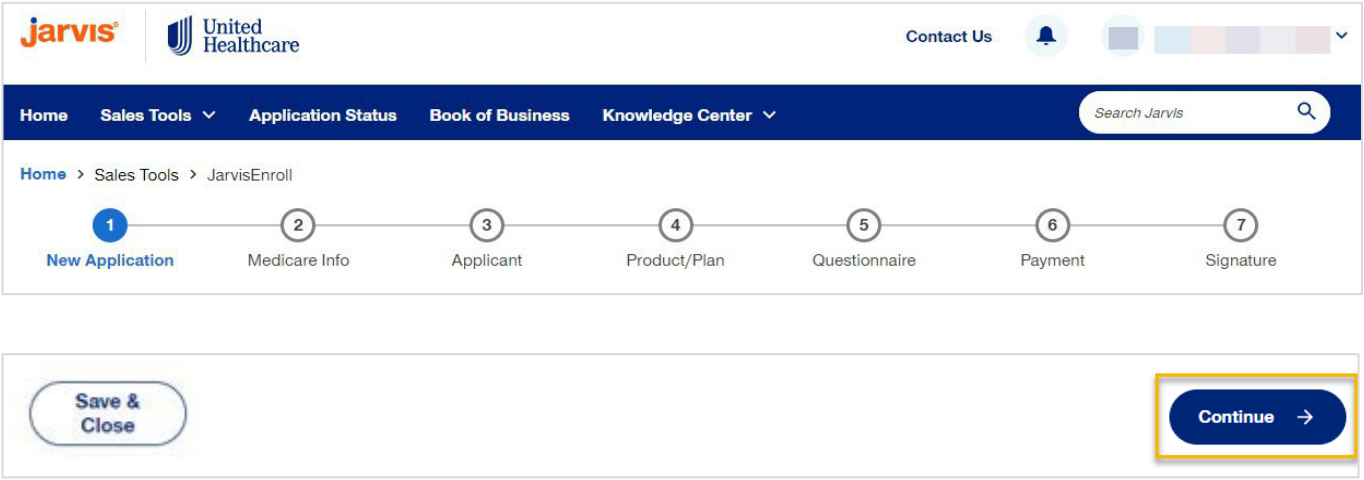
2 Completing the Application

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 on each page. All items with asterisks must be answered to complete the application and appropriate boxes checked. Note: The Part A and/or B dates do not have an asterisk but are required.

Click the **Continue** button at the bottom of each page to advance to the next screen.



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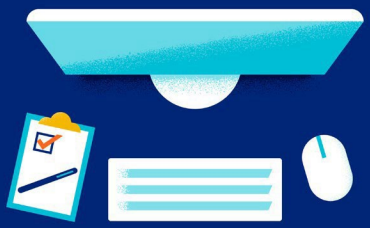
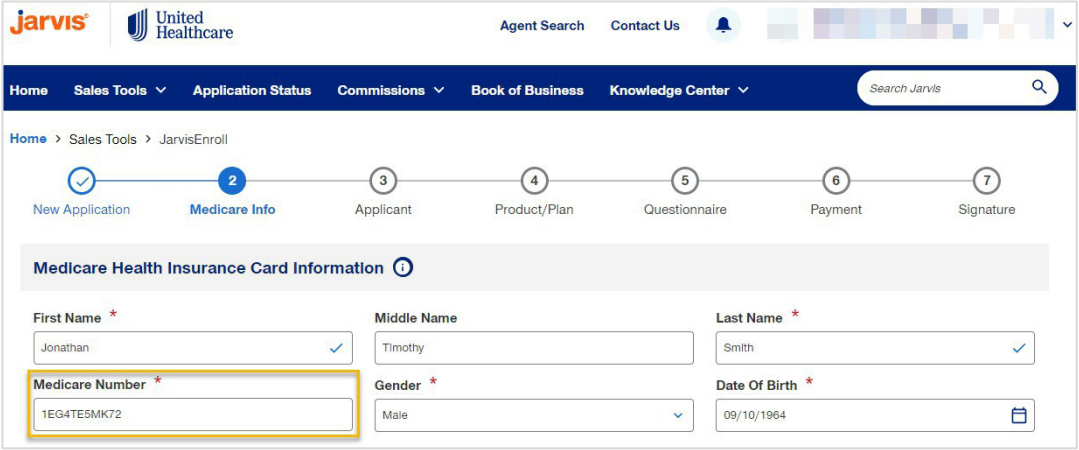


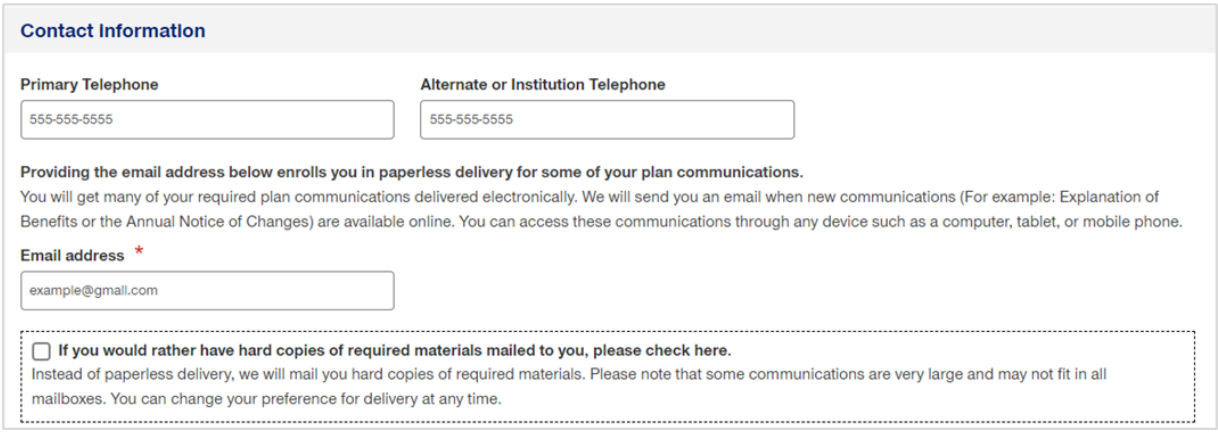
3 Medicare Information

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.



Continue speaking to the consumer and providing the required information on the JarvisEnroll pages. A **Yes** answer may open other fields that need to be completed.

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.



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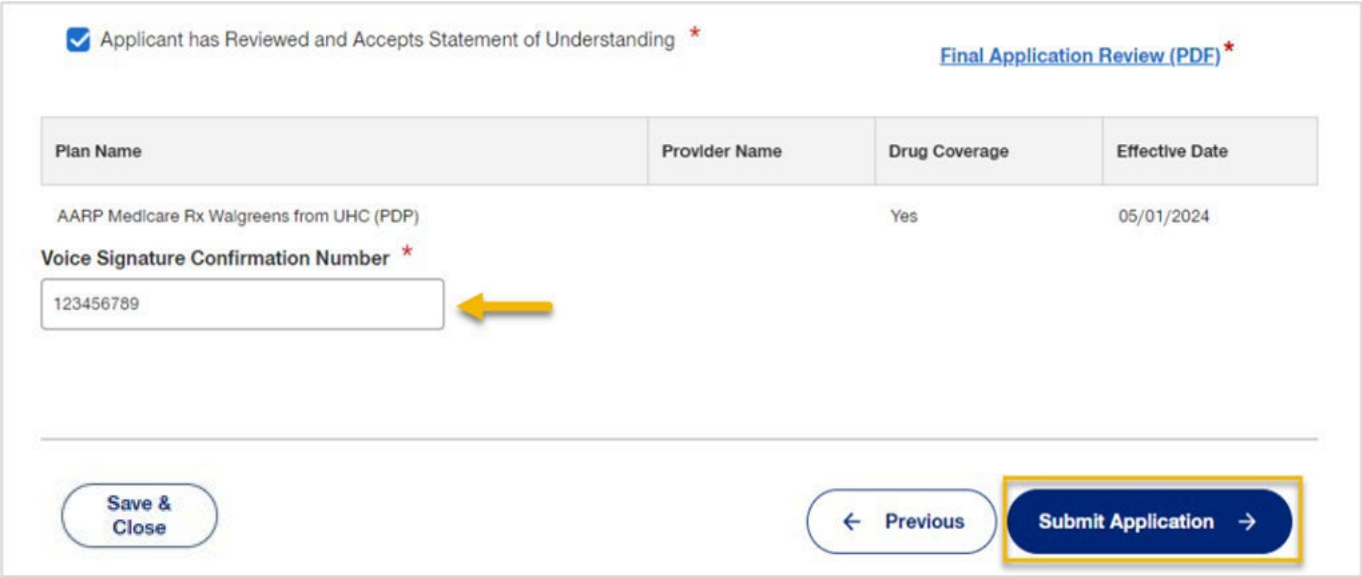
4 Voice Signature Confirmation

Once you reach the **Signature** screen, read each of the Statement of Understanding statements to the consumer and 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. Lastly, click **Submit Application**.



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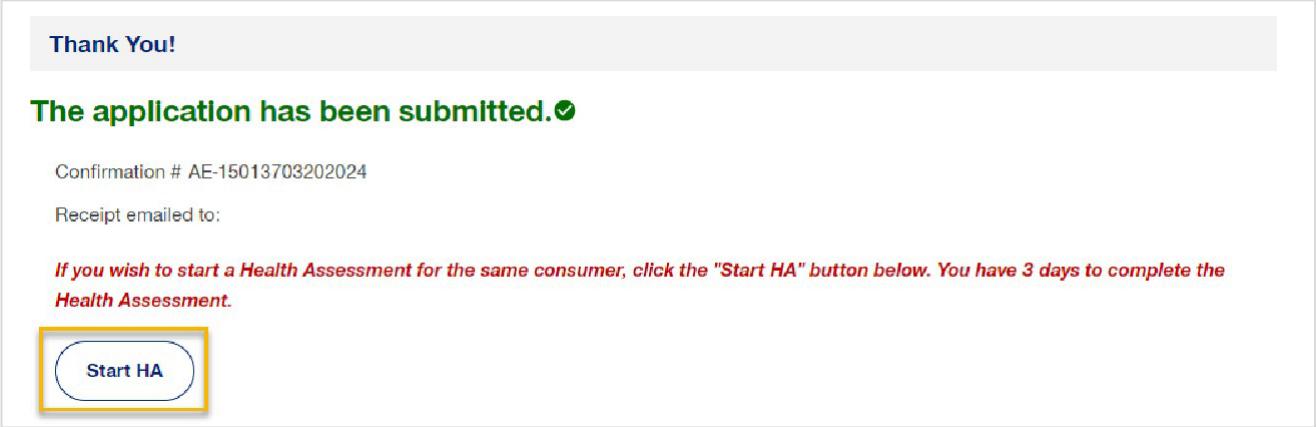
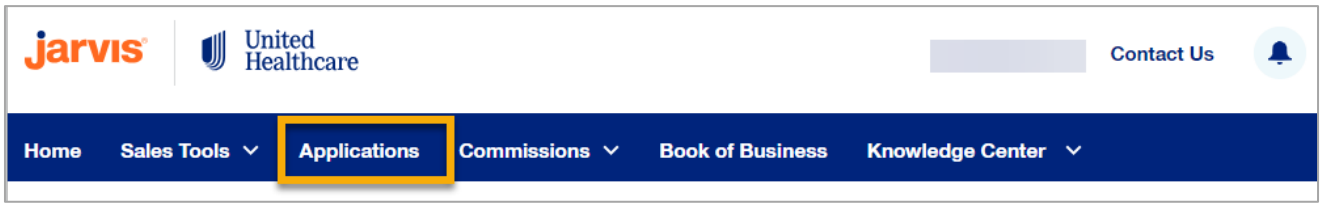
Click **Start HA** to immediately begin a Health Assessment (HA) or you can start the HA from the **Application Status tab** in Jarvis.

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



To find your completed Voice Signature applications, click on the **Applications tab** in Jarvis.



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