

Delegated Agent – Telephonic Enrollment Process
Hours (EST): 8:30am-5:00pm Monday – Saturday
Phone Number: 800-351-7798

Prior to Telephonic Enrollment Call

1. Complete sales presentation.
2. Use the Telephonic Enrollment Worksheet as a checklist to verify the customer has the information that will be required at the time of enrollment. This is the same information that is required to complete a paper application. The intent is not for you to write the information on the checklist, but to simply verify that the customer has the necessary information.
3. Explain the Telephonic Enrollment Process to the customer.

Telephonic Enrollment Call

1. Call the 800-351-7798. Introduce yourself as a Delegated Agent and notify the Humana representative of the number of customers you would like to enroll.
2. Confirm with the Humana representative that the customer is ready for telephonic enrollment.
3. Inform the Humana representative of which plan the customer has selected to enroll in.
4. At this time the Humana representative will complete the application. Either hand the phone to the customer so they can provide the Humana representative with their information or stay on the phone if you will be providing the information for the customer.
5. If the customer is providing their application information to the Humana representative, once the Humana representative has all of the customer's information they will ask to speak to you.
6. You need to provide your name, social security number and agency name (if applicable).
7. The Humana representative will ask to speak to the customer(s) again and will conference the customer(s) into the voice log.
 - If there are two or more customers, they must be on the line together in order to complete one voice log. Otherwise, a voice log per customer will be completed.
8. The Humana representative will start the voice log and the prerecorded questions.
 - If customer disagrees to the voice log disclosures the Humana representative will ask to speak to you. At this point the signature can not be completed and the call is discontinued with application unsigned.
 - If the customer agrees to the voice log disclosures the Humana representative will ask three final questions.
 1. Do you understand the benefits and conditions of enrollment as they have been explained for the <Plan Name>?
 2. Do you understand that we will release information to Medicare and other plans as is necessary for treatment, payment and health care operations?
 3. Do you understand that you are enrolling in Humana <Plan Name> for a premium of no more than <premium amount stated on application>?

If the customer has questions unrelated to the voice log, the Humana representative will refer the customer to you.
9. Upon gaining agreement to these last three questions, the Humana representative will give the customer the customer service number (for future needs), the voice log ID number and the application ID number.
10. The Humana representative will ask to speak with you to provide the voice log ID and the application ID number. This information should be recorded on the Temporary Proof of Membership. A receipt book of 25 can be ordered by contacting the Delegated Agent Support Unit at 800-309-3163.
11. If the product is an MA or MAPD, you will be transferred to the verification team to complete the verification.