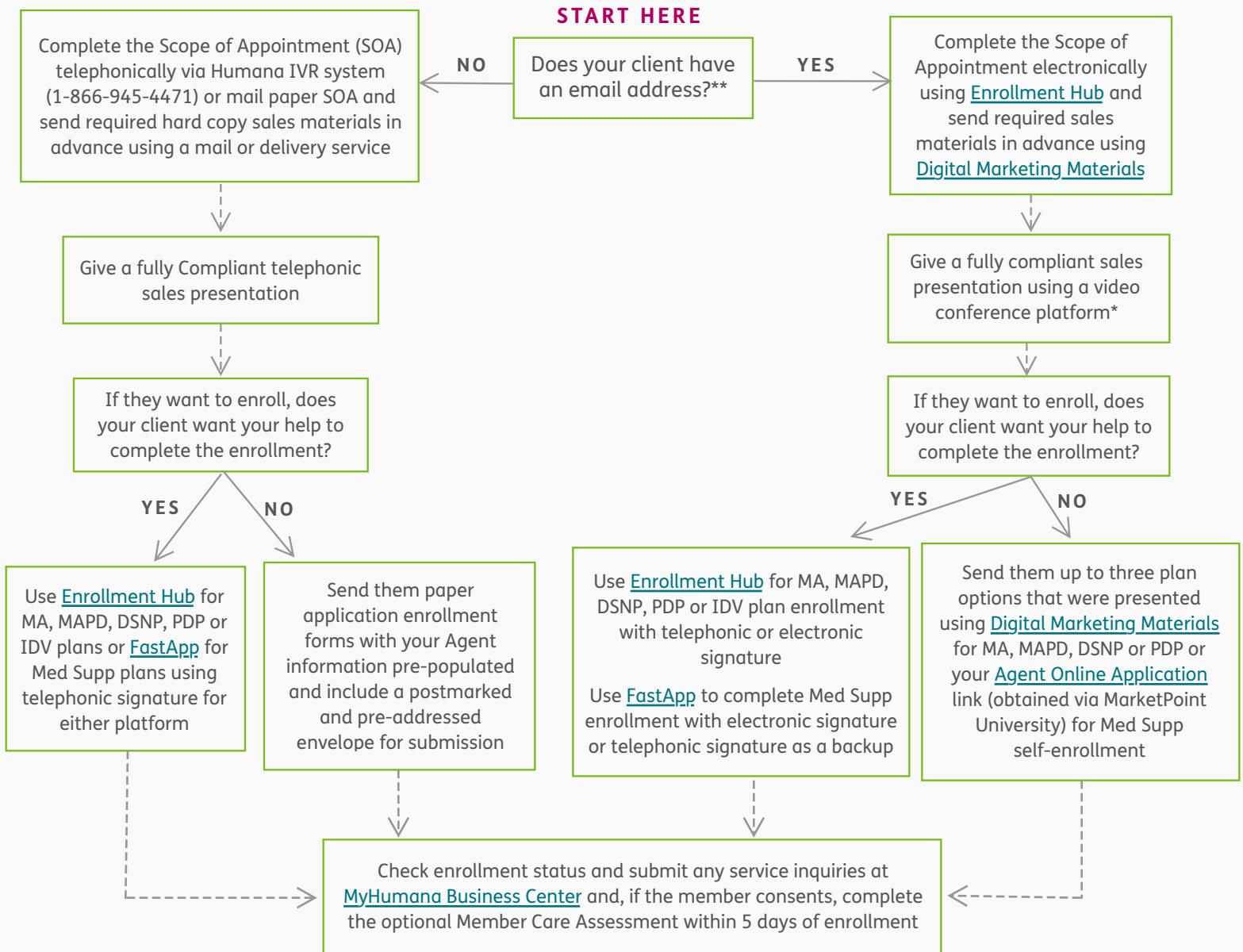# Help Clients Pick a Telephonic or Virtual Meeting and the Right Enrollment Method

Need help deciding which enrollment method to use and which tool to use when? We've got you covered with this handy decision tree. Use it to determine when to conduct a telephonic or video conference with a client aswell as when to use what tool at every step of the enrollment process. Confirm your client feels comfortable with the selected method; this is their decision and their health. You're here to help make it easier and more caring. Be sure you've reviewed Humana's policies on telephonic sales and virtual events beforehand.

START HERE

Does your client have an email address?**

NO →

Complete the Scope of Appointment (SOA) telephonically via Humana IVR system (1-866-945-4471) or mail paper SOA and send required hard copy sales materials in advance using a mail or delivery service

↓

Give a fully Compliant telephonic sales presentation

↓

If they want to enroll, does your client want your help to complete the enrollment?

YES / **NO**

YES → Use Enrollment Hub for MA, MAPD, DSNP, PDP or IDV plans or FastApp for Med Supp plans using telephonic signature for either platform

NO → Send them paper application enrollment forms with your Agent information pre-populated and include a postmarked and pre-addressed envelope for submission

YES →

Complete the Scope of Appointment electronically using Enrollment Hub and send required sales materials in advance using Digital Marketing Materials

↓

Give a fully compliant sales presentation using a video conference platform*

↓

If they want to enroll, does your client want your help to complete the enrollment?

YES / **NO**

YES → Use Enrollment Hub for MA, MAPD, DSNP, PDP or IDV plan enrollment with telephonic or electronic signature

Use FastApp to complete Med Supp enrollment with electronic signature or telephonic signature as a backup

NO → Send them up to three plan options that were presented using Digital Marketing Materials for MA, MAPD, DSNP or PDP or your Agent Online Application link (obtained via MarketPoint University) for Med Supp self-enrollment

Check enrollment status and submit any service inquiries at MyHumana Business Center and, if the member consents, complete the optional Member Care Assessment within 5 days of enrollment

*Career Agents may only use WebEx as their video conference platform.
**Ensure you use the appointment format the client prefers. Even if a client has an email address, they may prefer a telephonic presentation.

PRO TIPS

Earn 30 additional Reach Rewards points when you use an online tool to complete your enrollment with the beneficiary's consent. Do not pressure a beneficiary to use online enrollments tools unless they are completely comfortable doing so.
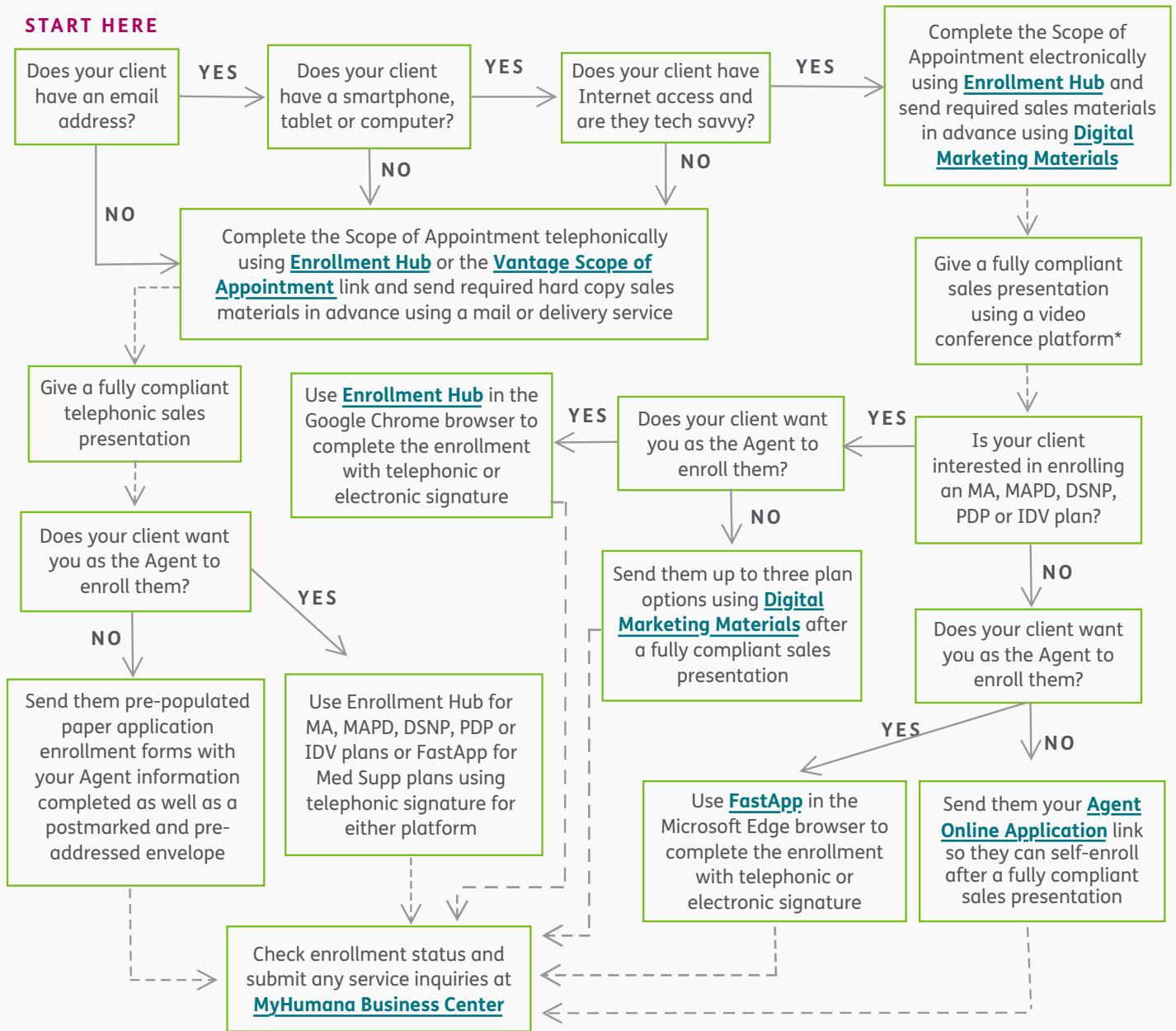
Clients can request alternative format materials in Braille, large-format, audio or a foreign language. Contact your local support team if you need help.

Need more information about Humana's online enrollment tools or adapting your workflow for a digital landscape?

Head to the Virtualizing Your Sales page on IgniteWithHumana.com.

Humana.

How to Pick the Right Enrollment Method for Clients Every Time

Need help deciding which enrollment tool to use when? We've got you covered with this handy decision tree. Use it to determine when to conduct a telephonic or video conference with a client as well as when to use what tool at every step of the enrollment process. Be sure you've reviewed Humana's policies on telephonic sales and virtual events beforehand.

START HERE

Does your client have an email address? — **YES** →

Does your client have a smartphone, tablet or computer? — **YES** →

Does your client have Internet access and are they tech savvy? — **YES** →

Complete the Scope of Appointment electronically using **Enrollment Hub** and send required sales materials in advance using **Digital Marketing Materials**

NO (from email address) →

Complete the Scope of Appointment telephonically using **Enrollment Hub** or the **Vantage Scope of Appointment** link and send required hard copy sales materials in advance using a mail or delivery service

NO (from smartphone/tablet/computer) ↓ to Complete the Scope of Appointment telephonically...

NO (from Internet access/tech savvy) ↓ to Complete the Scope of Appointment telephonically...

Give a fully compliant telephonic sales presentation

Does your client want you as the Agent to enroll them?

NO → Send them pre-populated paper application enrollment forms with your Agent information completed as well as a postmarked and pre-addressed envelope

YES → Use Enrollment Hub for MA, MAPD, DSNP, PDP or IDV plans or FastApp for Med Supp plans using telephonic signature for either platform

Use **Enrollment Hub** in the Google Chrome browser to complete the enrollment with telephonic or electronic signature

Does your client want you as the Agent to enroll them? — **YES** → (Use Enrollment Hub...)

Give a fully compliant sales presentation using a video conference platform*

Is your client interested in enrolling an MA, MAPD, DSNP, PDP or IDV plan? — **YES** → (Does your client want you as the Agent to enroll them?)

NO (from Does your client want you as the Agent to enroll them?) → Send them up to three plan options using **Digital Marketing Materials** after a fully compliant sales presentation

NO (from Is your client interested in enrolling...) ↓

Does your client want you as the Agent to enroll them?

YES → Use **FastApp** in the Microsoft Edge browser to complete the enrollment with telephonic or electronic signature

NO → Send them your **Agent Online Application** link so they can self-enroll after a fully compliant sales presentation

Check enrollment status and submit any service inquiries at **MyHumana Business Center**

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PRO TIPS

Earn 30 additional **Reach Rewards** points when you use an online tool to complete your enrollment.

Clients can request alternative format materials in Braille, large-format, audio or a foreign language. Contact your **local support team** if you need help.

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