

**EXAMPLE ONLY: DO NOT DISTRIBUTE**

## Complete This Form When a Call Recording is Missing

*All agencies and brokers selling Medicare Advantage and/or Part D plans must complete and submit the Missing Call Recording form when there is a failure to record or a failure to locate the recording for a call.*

***All agencies and brokers selling Medicare Advantage and/or Part D plans must complete and submit the Missing Call Recording form when there is a failure to record or a failure to locate the recording for a call.***

As a reminder, beginning October 1, 2022, you were required by CMS to record **all** calls with potential Medicare beneficiaries (prospects) and Medicare beneficiaries (current clients) in their entirety for January 1, 2023 policy effective dates. This includes calls that are part of the chain of enrollment into a Medicare Advantage or Part D Plan (the steps taken by a beneficiary from becoming aware of a Medicare plan or plans to making an enrollment decision), as well as post-enrollment telephonic discussions. CMS recently clarified that **ALL** calls with enrollees must be recorded, even calls that are outside the scope of the chain of enrollment, both inbound and outbound, and includes phone as well as calls made via Zoom or any other virtual call platforms.

You may be asked to provide the recording of a specific call. Common reasons a recording will be requested is for Sales Allegations, reporting recording system outage/failure and Audit of TPMO requirements. Note: This is not an all-inclusive list of reasons. When a call recording is missing or not found, you must have submitted the Missing Call Recording Form.

**Complete the form as soon as you are aware there is a missing call recording, or you have neglected to record the call.** This form does not need to be completed when the prospect/member declines to be recorded.

You can view and/or download the Missing Call Recording form by clicking [here](#). The form includes instructions for submission.

Please return this form with the Agent Response Form to [SalesComplaint@anthem.com](mailto:SalesComplaint@anthem.com) if related to a Sales Allegation. **Always** email the completed form to [ma\\_sales\\_compliance\\_request\\_and\\_questions@anthem.com](mailto:ma_sales_compliance_request_and_questions@anthem.com) mailbox for review.