Recording Scope of Appointment and Telephonic Enrollments with UPMC for Life

As a reminder, the Centers for Medicare & Medicaid Services (CMS) has released guidance that states all calls with your clients must be recorded. The agent must also state the new TPMO disclaimer within the first minute of the recorded phone call: **"We do not offer every plan available in your area. Any information we provide is limited to those plans we do offer in your area. Please contact medicare.gov or 1-800-MEDICARE to get information on all of your options."**

Authorized agents can use various methods to record non-enrollment calls. This could include a recording platform provided by your general agency, UPMC *for Life*, smartphone technology, or elsewhere. Please contact your broker manager if you need UPMC *for Life* to provide you with a call recording solution for non-enrollment calls.

All UPMC for Life telephonic enrollments must be taken by the UPMC for Life Enrollment Line. Telephonic enrollment into a UPMC for Life plan using any other recording platforms, including one provided by a general agency, will not be accepted. Agents are prohibited from completing their own telephonic enrollment calls.

Here's how we can help you complete SOAs and telephonic enrollments with a UPMC for Life representative:

- All authorized agents have access to the UPMC for Life Telephonic Enrollment Line. This allows a UPMC for Life representative to complete a telephonic enrollment for you on a recorded line.
 - o Call toll-free 1-866-400-5067.
 - Hours of operation: Oct. 1 Dec. 31 seven days a week from 7 a.m. to 9 p.m. and Jan. 1 Sept. 30 Monday through Friday from 8 a.m. to 8 p.m. and Saturday from 9 a.m. to 3 p.m.
 - The UPMC *for Life* representative will walk your client through the enrollment process, provide a confirmation number, and advise them of what to expect next as a new UPMC *for Life* member. You can also call into the above phone number with your client on the line and complete the enrollment together.

TIP: The Broker Resource Center is here for you! Call us if you need help completing an SOA, connecting with the UPMC for Life Enrollment Line, or creating a telephonic enrollment note in Cavulus. We can also help you verify eligibility for SNP and upload the necessary documentation to Cavulus.

Call us toll-free: 1-855-289-3197. Hours of operation: Oct. 1 – Dec. 31 seven days a week from 7 a.m. to 9 p.m. and Jan. 1 – Sept. 30 Monday through Friday from 8 a.m. to 8 p.m. and Saturday from 9 a.m. to 3 p.m.



Document your telephonic enrollment in Cavulus to make sure you receive credit for the sale.

- 1. Create or update your client's information in Cavulus with their name, current permanent address, and phone number.
- 2. Add a note and make sure to include the following details:
 - o The plan the client wants to enroll in and applicable premium.
 - The preferred effective date and enrollment period being used. A listing of the enrollment periods with abbreviations are included on the next page.
 - o Your client's 11-digit Medicare number and Part A and Part B effective dates.
 - o The name of your client's PCP (if they have one).
 - o Selected premium payment option.

You can use this template to easily create your note. Copy and paste it into Cavulus and then add your client's information. Cavulus will automatically put these in paragraph form when the note is saved.

Template:

- ***Final TE Note:
- , Requesting enrollment in-
- , Effective Date-
- , Enrollment Period-
- , Medicare Number-
- , Part A Effective Date-
- , Part B Effective Date-

, PCP-

, Payment Method-

Note when completed in Cavulus:

3. If you cannot find the lead in Cavulus or it is not assigned to you and you need to leave a telephonic enrollment note, reach out to your broker manager to request the record reassignment or they can add the telephonic enrollment note on your behalf.

Enrollment period notes for Cavulus

Enrollment Period	Note for Cavulus
I am making my Annual Enrollment Period election (10/15-12/7).	AEP
I am enrolled in a Medicare Advantage plan and want to make a change during the Medicare Advantage Open Enrollment Period.	OEP
I am new to Medicare.	ICEP; IEP; NEW
I am leaving employer or union coverage.	LEC
I have both Medicare and Medicaid (or my state helps pay for my Medicare premiums), or I get Extra Help paying for my Medicare prescription drug coverage, but I haven't had a change.	Medicare/Medicaid; MDE; LIS; Extra Help
I was enrolled in a Special Needs Plan (SNP), but I have lost the special needs qualification required to be in that plan.	Losing Dual; Losing SNP
I no longer qualify for Extra Help paying for my Medicare prescription drugs.	LOSING EXTRA HELP
I belong to a pharmacy assistance program provided by my state.	PACE; PACENET; SPAP
I am disenrolling from a Part D plan to enroll in or maintain other creditable drug coverage.	MCC
I recently lost my creditable prescription drug coverage (coverage as good as Medicare's).	LCC
I recently moved outside of the service area for my current plan, or I recently moved and this plan is a new option for me.	MOV
I recently returned to the United States after living permanently outside of the U.S.	MOV-US
I am moving into, live in, or recently moved out of a long-term care facility.	LTC
In the last 12 months I left a Medigap policy to join a Medicare Advantage plan for the first time.	MGAP ENROLL
I was recently released from incarceration.	RELEASED
I recently obtained lawful presence status in the United States.	LAWFUL PRESENCE
I recently left a PACE program.	CONTRACT ENDING
My plan is ending its contract with Medicare, or Medicare is ending its contract with my plan.	CONTRACT ENDING
I was affected by a weather-related emergency or major disaster (as declared by FEMA). One of the other statements here applied to me, but I was unable to make my enrollment because of the natural disaster.	FEMA

UPMC HEALTH PLAN