

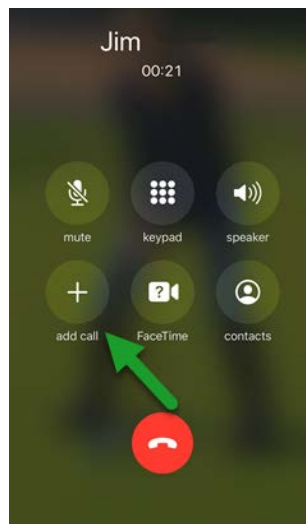
For those consumers who do not want to meet in person or have limited internet access, you can use LEAN's Voice Signature to complete the enrollment application by telephone. Unlike remote signature, the consumer is not required to have an email address.

Before you start, make sure:

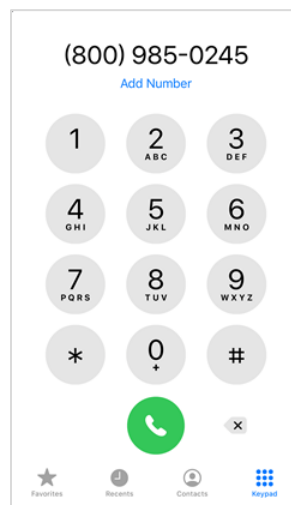
- You have completed a Scope of Appointment (SOA) prior to the appointment. Rules for obtaining a SOA have not changed. See your Agent Guide or the Sales Policy Scope of Appointment job aid for more information on SOA rules.
- You can do a conference call or 3-way call with the consumer and phone recording 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.

Step 1 – Call the consumer. Once you have the consumer on the line and have completed the needs assessment, verified all physicians, 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**.

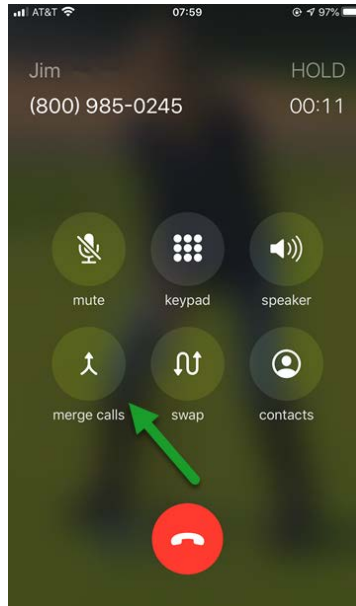


Step 2: On the keypad, dial **800-985-0245** and wait for the system to answer your call.

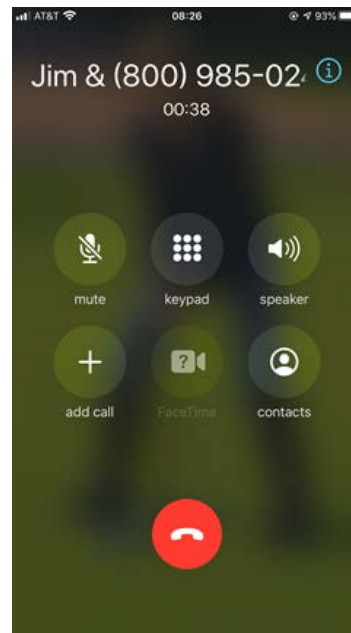


Step 3 – When the Voice Signature system answers the call, you'll hear the introductory welcome message and directions to enter your writing ID and press #. If your writing ID includes letters, do not enter those letters. Once you press #, the system will begin recording.

Step 4 With the consumer on HOLD, press **merge calls**. This icon is in the same location as **add call**.



Step 5– Once you've pressed **merge calls**, both you and the consumer will be able to communicate with the Voice Signature recording system.



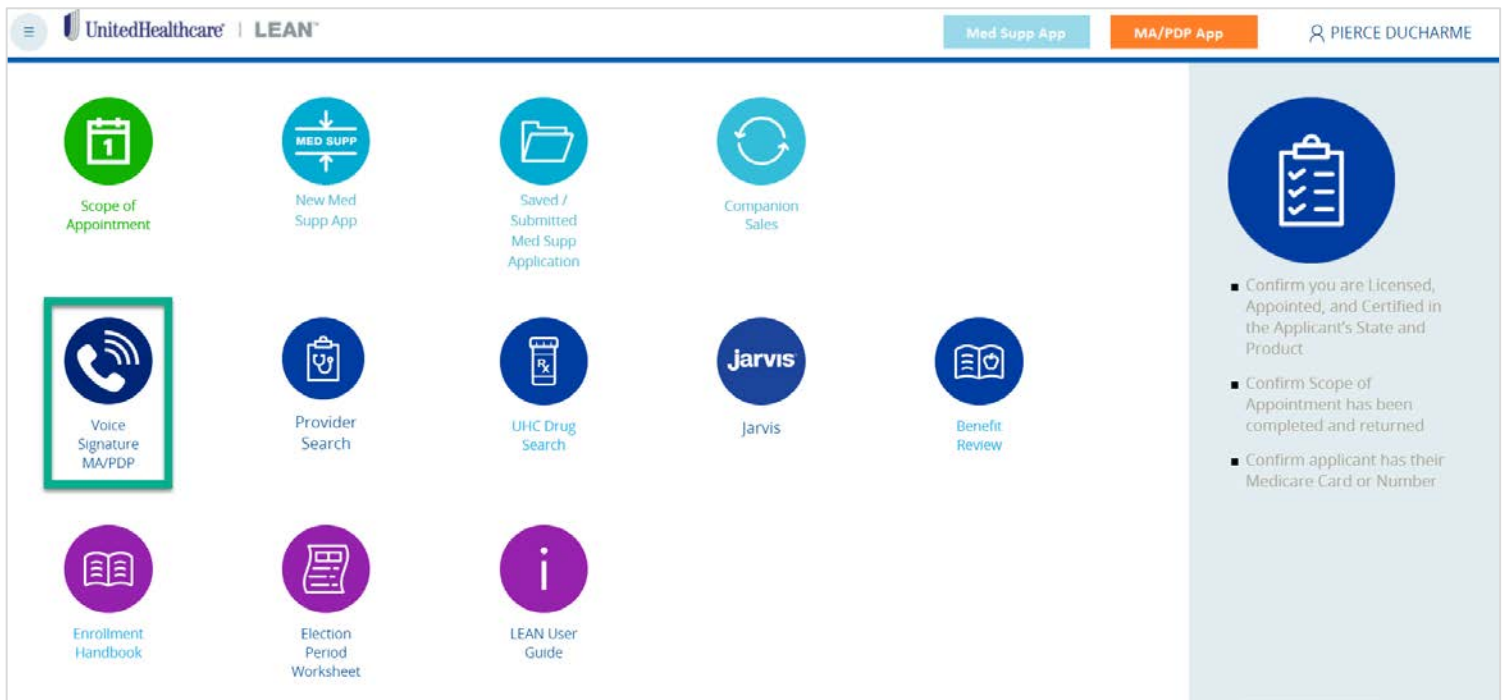
When the enrollment is complete, the Voice Signature recording will end, and the Voice Signature recording system will disconnect. You will still be connected to the consumer.

For more information on how to set up a conference call or 3-way call on a Samsung device, please click [here](#).

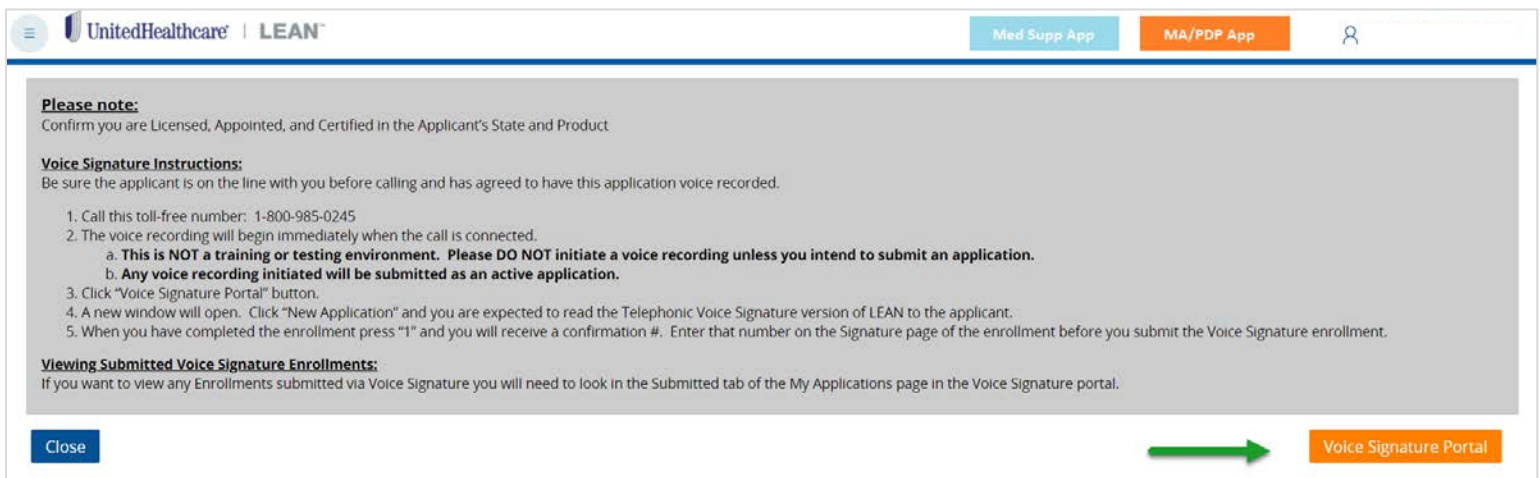
For more information on how to set up a conference call or 3-way call on an Apple device, please click [here](#).

IMPORTANT: Call into the provided toll-free number prior to starting the application. Failure to do so will result in an incomplete application. For assistance with setting up a three-way call with your consumer, please contact your carrier for device/carrier specific details.

Step 6– Click **Voice Signature MA/PDP** on the LEAN home page.

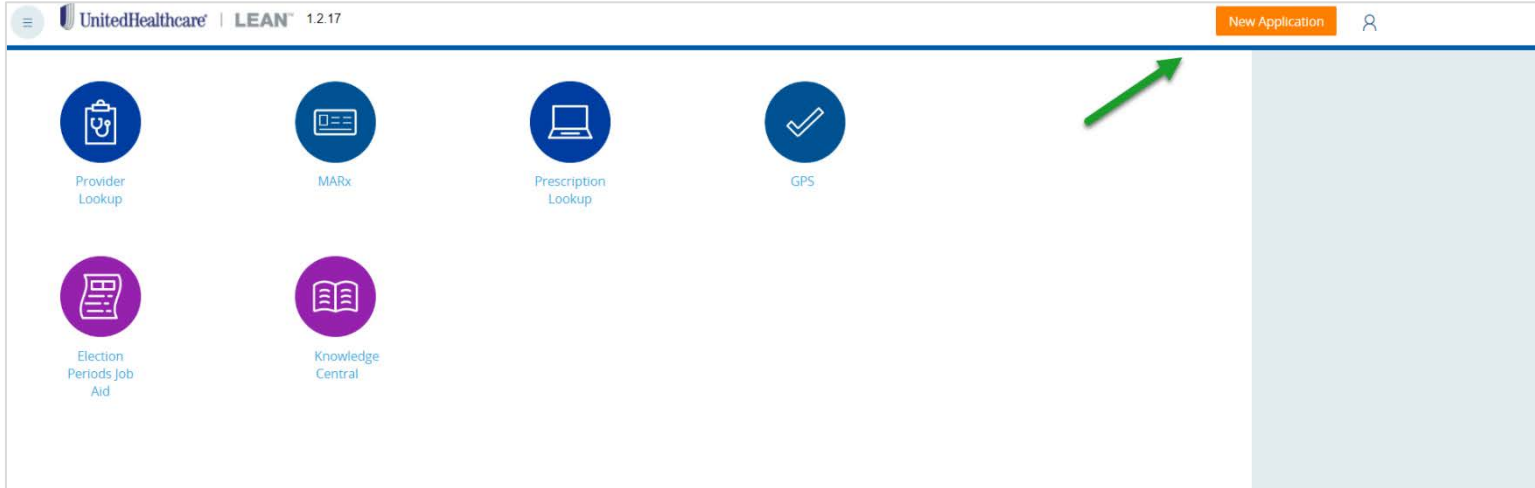


Step 7 - Once the welcome message is complete, click **Voice Signature Portal** under the directions.

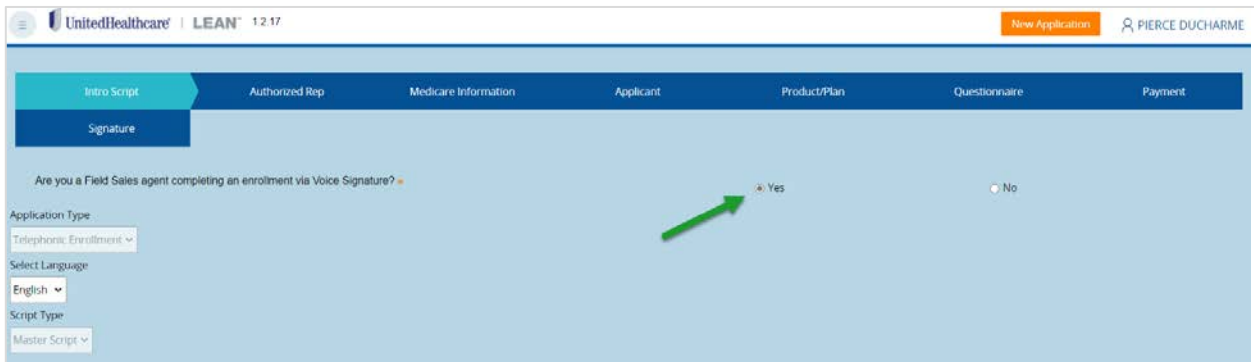


Step 8 - A new window opens. Click **New Application** in the upper right-hand corner to open a new Voice Signature application and read the Telephonic Voice Signature version of LEAN to the applicant.

PLEASE NOTE: 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.



Select **Yes** to **Are you a Field Sales agent completing an enrollment via Voice Signature?** The **Application Type**, **Script Type** and **Individual** fields will populate and cannot be changed.



Step 9 – Continue answering the questions and providing the required information. All items with orange asterisks must be answered to complete the application and the appropriate check box marked. Continue clicking on the orange button at the bottom of each page to advance to the next screen.

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



The screens on the Voice Signature process are like the screens you are used to seeing on LEAN. 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 LEAN pages. A **Yes** answer may open other fields that need to be completed. While not a required field, please enter the consumer's primary phone number in the Contact Information.

Once you have selected a plan, you must read the reminder to the consumer and check the box.

Read each of the payment statements to the consumer.

FOR AGENT USE ONLY - DOES NOT HAVE TO BE READ TO THE CONSUMER

Plan	Plan Premium
IND - Preferred Choice Palm Beach (HMO) (MAPD)	\$0
Total Monthly Premium	\$0.0

- The monthly premium for this plan is \$0 in addition to your Part B Premium, if you have one.
- If you receive any Extra Help, Medicare will pay all or a portion of your drug premiums. We'll bill you for any remainder.
- For information on Extra Help, contact the Social Security Administration.
- If you didn't have creditable prescription drug coverage when you first became eligible for Medicare, you may have a late enrollment penalty. If this applies to you, we'll send you a letter.
- For those with incomes above a certain level, Medicare may apply an extra amount for Part D. If this applies to you, Medicare or the RRB will bill you or withhold it from your Social Security check.

Discard
Continue to SOU Signature >

If the plan has a premium, you will be required to select a payment option.

Plan	Plan Premium
IND - AARP MedicareRx Preferred (PDP) (PDP)	\$79.8
Total Monthly Premium	\$79.8

- The monthly premium for this plan is \$79.8 in addition to your Part B Premium, if you have one.
- If you receive any Extra Help, Medicare will pay all or a portion of your drug premiums. We'll bill you for any remainder.
- For information on Extra Help, contact the Social Security Administration.
- If you didn't have creditable prescription drug coverage when you first became eligible for Medicare, you may have a late enrollment penalty. If this applies to you, we'll send you a letter.
- How would you like to pay your premium?
 - Direct Pay (Monthly Statement)
 - Deduction from Social Security
 - Deduction from Railroad Retirement Board
 - Electronic Funds Transfer (EFT)
- We will bill you directly until the Social Security Administration approves the deduction. Once we notify you of the approval, you may stop making your monthly payment. It could take up to 90 days after the approval for the first deduction to occur and it could be for up to three months of premium.
- For those with incomes above a certain level, Medicare may apply an extra amount for Part D. If this applies to you, Medicare or the RRB will bill you or withhold it from your Social Security check.

Discard
Continue to SOU Signature >



The last page of the Voice Signature application is the Signature page. Once you read each of the Statement of Understanding statements to the consumer, 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 1 on your phone keypad.

You will receive a confirmation number verbally from the recording. Enter that number into the **Voice Signature Confirmation Number** field. If you need the number repeated, you can press 1 on your keypad to have the Confirmation number repeated up to three times. If you do not press 1 to have the number repeated, the call will end.

Click **Submit Application** to submit the application.

Click **Start HA** to immediately begin a Health Assessment (HA) or you can start the HA from the **My Applications** page of this Telephonic Voice Signature version of LEAN. The Health Assessment will not be recorded. For more information on completing the Health Assessment, please see the Health Assessment in LEAN job aid in Learning Lab > Content Library > Health Assessment.

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.

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.