

## RECORDING SOLUTIONS AND GUIDANCE

Sunfire and MyMedicareBot provide licensed agents with FREE telephonic call recording and storage capabilities in line with CMS's new call recording requirements and available now. Additionally, for agents that don't utilize an online enrollment platform, call recording solution Dialpad is available at a discounted monthly rate. *For more information on these solutions, contact your marketer or IMO.*

01



### Starting a call with an existing or prospective beneficiary

Do I need to **record** the conversation?

**Yes, if the client agrees to be recorded, you must record all calls associated with an enrollment.**

02



### Do I need to provide the call recording to carriers?

**Yes, if requested.**

**How long after the request do I need to provide recordings?**

**It varies from carrier to carrier.** Please note, however, that recordings must be stored for a minimum of 10 years.

03



### Starting a face-to-face meeting with an existing or prospective beneficiary

Do I need to **record** the conversation?

**No, BUT...**

It remains **best practice** to keep accurate records of all existing and prospective beneficiary interactions

**What if the client *does not consent* to being recorded?**

You may remind them that new government regulations **require certain calls with Medicare beneficiaries be recorded** to maintain quality and ensure information relayed is accurate.

**What if they *still do not consent* to being recorded?**

You must politely **end the call.**

**What if they *agree* to being recorded?**

You may **acknowledge the call is being recorded** and proceed with the call.

**Can I use Zoom to record my client calls?**

**Third-party services may be used** so long as all calls are recorded and stored per CMS's requirements. Agents are strongly cautioned, however, that many third-party services may not comply with HIPAA regulations.

# DISCLAIMERS GUIDANCE

01



## Starting a call with an existing or prospective beneficiary

Do I need to provide a disclaimer

**Yes, within 60 seconds of each call**

02



## Emailing an existing or prospective beneficiary

Do I need to provide a disclaimer?

**Yes, prominently on any communication or marketing materials**

03



## Starting a face-to-face meeting with an existing or prospective beneficiary

Do I need to provide a disclaimer?

**No**

### What's the disclaimer?

"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."

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### Questions?

Connect directly with your marketer or email [Info@YourMedicare.com](mailto:Info@YourMedicare.com)

For more AEP guidance, **email inquiry to:** [Info@YourMedicare.com](mailto:Info@YourMedicare.com)