YourMedicareBot.com

Tips for a Successful and Compliant Telephonic Enrollment

1. Agents should only have **one enrollment browser open at a time** within the YourMedicare Bot system. Closing unnecessary browser windows will ensure that the telephony process runs smoothly.

2. When an enrollment browser is no longer being used the agent should click the red **"Save and Exit"** button at the bottom of the screen to close out the browser.

3. Agents should ensure that the client's contact number is entered into the "Client Phone Number" field before beginning the telephonic process. This will enable the agent to click "Redial Applicant" directly from the screen they are on, should they get disconnected at any time during the enrollment process.

4. The right side of the agent's screen must show "Awaiting client call" in order for the client to connect to the agent using the telephony system.

5. The "Next" button on the bottom of the telephony page will not be activated until the client and the agent connect via the telephony system. Once a successful connection is made, the button will be activated enabling the agent to continue to the enrollment application.

6. In the event that an agent misses the initial call from the client via the telephony system and the right side of the agent's screen shows "Redial Applicant" the agent will need to refresh their telephony availability by toggling the "ready to receive call from client" button off and then on again so it moves back to "Awaiting client call" in order for the client to be able to reach the agent via the telephony system.

7. If at any time during the enrollment process the telephony connection between the agent and client is disconnected, the navigation at the bottom of the screen will be inactivated. The agent will need to click "Redial Applicant" to reestablish telephony connectivity with the client in order to continue.

8. Agents must remain connected to the client via the telephony system throughout the entire enrollment process until the application is submitted and the enrollment confirmation number is provided to the client.