

Telephonic SOA & Enrollment Process for Brokers

Introduction: This job aid explains the steps for a Broker to engage Molina to perform a telephonic enrollment with a beneficiary, as an alternative to using the DRX Electronic Enrollment tool. When the Broker cannot meet with the beneficiary, he/she may use this process to enroll the beneficiary in a Molina Medicare plan. At the end of this document are Frequently Asked Questions (FAQs).

Steps for Telephonic Scope of Appointment (SOA)

Note: Only use this if you have not secured an SOA using another means.



Contact the Broker Support Unit

1. While on the phone with the beneficiary, perform a 3-way call with the Molina Broker Support Unit (866-440-9788), option 5, **6 AM – 6 PM Mountain Standard Time, Monday – Friday** tell the coordinator you want to record a telephonic scope of appointment
2. Broker Support Unit completes the recorded SOA
3. A confirmation email will be sent to the broker

Steps for Telephonic Enrollment

Login to Callidus

1. Open an internet browser and enter this URL address: <https://molina.callidusinsurance.net/ICM/>
2. Enter your Callidus user name and password and press **Login**. **This must be an agent login (cannot use an agency login).**
 - a. The User id is the agent's writing number (less any alpha characters) ex: 1234567
 - b. Click **Forgot Password** if needed to recover password. Email will be sent to the email on file for the agent.
3. Select **Telephonic Enrollment** on the left navigation bar to open that menu

Upload the Completed Enrollment form

4. Upload the completed Telephonic Enrollment Form



1. Select **File Upload**



2. Click 

3. Click **Upload File**



4. Click  or 

5. Navigate to and select the saved file, click **Open**

6. Click 

i. The selected file will be displayed on the screen when the upload is complete. This may take a few seconds.

Connect Beneficiary with Telephonic Enrollment

5. Now that the application is in the queue perform a 3-way call with the beneficiary and the Molina Telephonic Enrollment team (866-714-8996) 6:00 AM-6:00 PM Mountain Standard Time and stay on the line while they complete the enrollment.

Confirmation email is sent

6. A confirmation email will be sent to the Broker informing them of the completed enrollment.


How to Download and Use the Enrollment Form Template

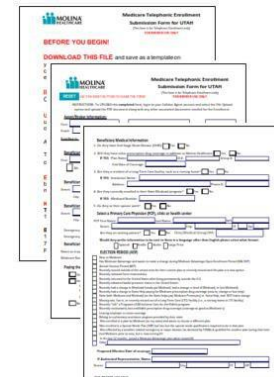
Download and edit the Enrollment file from Callidus

Before you begin, you must have a downloaded copy of the Telephonic Enrollment form for the beneficiary's state on your PC. PDF file edits will **not** be saved until downloaded to our local machine. Save as a template on your local machine before filling it out. Edits can be saved before uploading a final copy for each client.

1. After logging on to Callidus, Select **Telephonic Enrollment** from the left navigation pane
2. Select the desired Enrollment Form template for the beneficiary's state



3. Click  to download the document to the PC to save the form template to your PC
 - a. Once stored, this can be used as a template for all enrollments for that state
4. Open the downloaded Enrollment form and complete all fields in the fillable PDF form (using Adobe Reader or another PDF editor).
5. Click **File > Save As**
 - a. Store on the PC with a name that refers to the beneficiary (ex: "Jones, Susan 6-1-2020 Telephonic Enrollment form)



Note: PDF Files with fillable field edits will **not** be saved if edited within a browser window. It must be edited within Adobe Reader or another PDF editor.

Frequently Asked Questions (FAQ)

1. What happens during the Enrollment call by Molina Telephonic Enrollment team?

- The Molina Telephonic Team member will call the beneficiary on a recorded line. They will:
 - verify the information provided
 - read necessary CMS disclosures
 - record the beneficiary's approval to enroll

2. How long does the enrollment take?

- This typically takes between 10 and 20 minutes.

3. What are the hours of the Molina Telephonic Enrollment team?

- 6:00 AM – 6:00 PM Mountain Standard Time, M-F.
- Phone number: 866-714-8996

4. Why am I unable to upload the file in Callidus?

- If an Agency account was used to login to Callidus, the system will display an error when trying to save the file. The user must login using an agent account and try again.

5. How do I locate my Callidus user name?

- The Molina writing number is your Callidus user ID. If you cannot remember your writing number, call the Broker Support Unit (866-440-9788) for assistance.

6. What are all my options for submitting an enrollment to Molina?

- DRX (Electronic Enrollment) in person or email
- Paper enrollment US postal mail or fax
- Telephonic Enrollment (see the instructions above)

7. What are all my options for completing a Scope of Appointment (SOA)?

- DRX in person or email
- Paper SOA, mailed or scanned and stored into DRX
- Telephonic SOA (see the instructions above)

8. Can I use the Telephonic SOA with a paper application or DRX submitted application?

- Yes, the Telephonic SOA can be used in conjunction with any of our enrollment methods. We recommend the broker keep a copy of the Telephonic SOA confirmation email for their records.