Molina Healthcare Enrollment Options

Disclaimers

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Enrollment Options

1   **Paper Enrollments**

2   **DRX Enrollments**

3   **Telephonic Enrollment-Broker Support**

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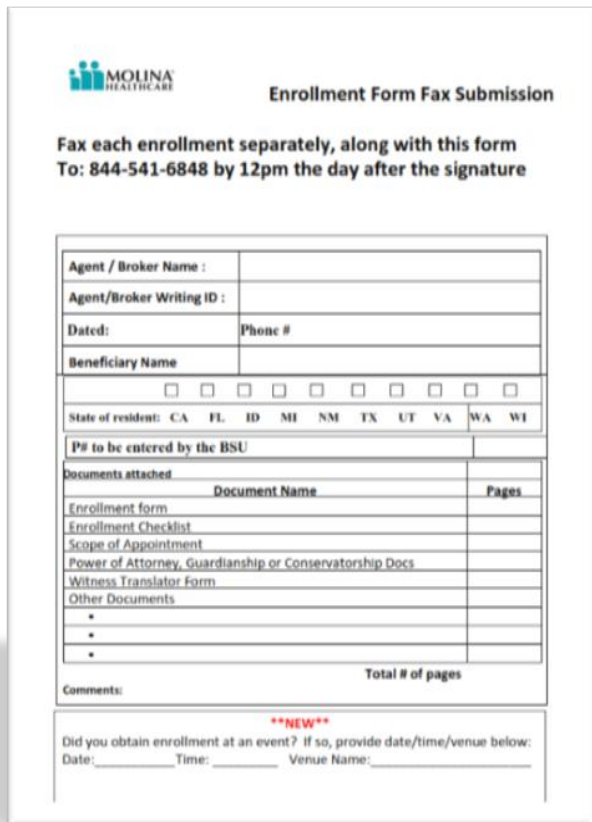# Paper Enrollments

This section of the presentation will review Frequently Asked Questions and best practices.

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Paper Enrollments (1 of 2)

- **First Step**: Submit the Enrollment Fax Cover Sheet as shown below.

Question	Response
Where can I locate the paper Enrollment Form?	The Broker can find the paper Enrollment Form in the back of the Enrollment Kit.
Where do I fax the paper Enrollment Form?	All paper Enrollment Forms can be faxed to: (844) 541-6848

Paper Enrollments (2 of 2)

- Fax Cover Sheet
- Enrollment Forms
- SCOPE
- Power of Attorney
- Authorized Rep form
- Proof of SLMB, Q1, Medicaid if SEP

DRX Enrollments

2024 DRX User Training Guide

This section of the presentation will cover Frequently Asked Questions.

DRX Electronic Enrollment FAQs (1 of 4)

Question	Response
When we send the access site (link) and an applicant enrolls themselves, do we receive credit for the enrollment?	If the Broker sends the applicant a link to self-enroll, the Broker will receive credit for that specific enrollment.
If the applicant enrolls online, do I need to complete a paper Enrollment Form?	No, the online enrollment replaces the need for the paper Enrollment Form. You can print a confirmation for the applicant using the Print Option. If you provided the applicant's email address, DRX can email a confirmation to the applicant as well.
Aside from the confirmation page received upon enrollment, will we receive a confirmation email?	In DRX, you can view the new member's plan information. If you wish, you can also download a copy of the completed application from the new member's profile page for your records.

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DRX Electronic Enrollment FAQs (2 of 4)

Question	Response
How do I link the SOA to the enrollment within the DRX SOA tab?	1) Email/Text the SOA to the applicant via DRX. 2) Complete SOA form in-person via DRX. 3) Use the Print Consumer Form SOA process when meeting with the applicant. 4) Upload a scanned copy of the SOA.
Are we allowed to do paper enrollments versus electronic enrollments?	Yes, you can do either, however, completing the enrollment electronically is much easier. By choosing to do the enrollment electronically, there is no need to complete a paper Enrollment Form. **One enrollment method is sufficient.**
Does the applicant need a valid email address in order to process their enrollment?	No, email address is not required for any of the enrollment options available.

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DRX Electronic Enrollment FAQs (3 of 4)

Question	Response
I would like to practice submitting an application to DRX. How can I do this?	Brokers and Field Agents can use the Staging environment to practice using DRX. We recommend that you use your own email address for the applicant so that you can view the details a member would receive upon enrollment. Please follow the details below: **Link for 2024 Plans:** https://molina2.staging.destinationrx.com/PC/Agent **At the initial login page**: Username: Molina_client Password: Molina123! **At the DRX login page**: Username: CNX_testagent Password: testagent

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DRX Electronic Enrollment FAQs (4 of 4)

Question	Response
The applicant does not have a valid email address. Can they still receive their materials electronically?	Yes. Each member receives a set of instructions on how they can retrieve their documents electronically.
In DRX, where can I set the applicant's subsidy level?	In the Preferences section of DRX. Be sure to set the preferences *before* you begin a quote so that premium calculations are accurate.
When should Call Recording feature be used?	In situations where broker cannot physically meet with beneficiary, telephonic enrollment option is available. All sales calls with beneficiaries are to be recorded in their entirety, up through the enrollment.

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DRX Telephonic Enrollment FAQs (1 of 2)

Question	Response
What scripting should be followed when completing Telephonic Enrollment?	Brokers are to provide the below disclaimer verbally: ***"We do not offer every plan available in your area. Currently we represent** [insert number of organizations] **organizations which offer** [insert number of plans] **products in your area. Please contact Medicare.gov, 1-800-MEDICARE, or your local State Health Insurance Program (SHIP) to get information on all of your options."*** Provide this disclaimer within the first minute of the call. The disclaimer cannot be at the end with all the other disclaimers. Telephonic Enrollment Scripting is required when sales agent is submitting enrollment over the phone. All script in red print is required. 2024 Medicare Telephonic Enrollment Call Guide

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DRX Telephonic Enrollment FAQs (2 of 2)

Question	Response
How should Beneficiary Signature section be completed for a Telephonic Enrollment?	For Telephonic Enrollments, check box "Due to physical limitations…" and type in "Telephonic Enrollment"

Telephonic Enrollment Broker Support

Job Aid: Telephonic SOA & Enrollment Support Process for Brokers

This section of the presentation will cover guidelines, step-by-step instructions, and Frequently Asked Questions.

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Telephonic SOA Guidelines

3-way Call with Client and BSU

Broker Support Completes Telephonic SOA (3-5 minutes)

A confirmation email will be sent to the broker.

While on the phone with the beneficiary, perform a 3-way call with the Molina Broker Support Unit (866-440-9788), option 5, between the hours of

6 AM – 6 PM Mountain Standard Time, Monday – Friday

Inform the Coordinator you would like to record a telephonic scope of appointment.

Broker Support Unit completes the SOA on a recorded line with you and the beneficiary on the line.

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

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Telephonic Enrollment PDF Template Form Instructions

1) Before you begin, you **must** have a downloaded copy of the Telephonic Enrollment form for the beneficiary's state saved on your PC.

2) Open the downloaded Enrollment form and complete all fields in the fillable PDF form (using Adobe Reader or another PDF editor).

3) Click **File** > **Save As**

4) Save the file on your PC using a similar format: *Susan Jones 6-1-2022 Telephonic Enrollment Form*

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

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Telephonic Enrollment Instructions (1 of 2)

1) Open a web browser and type the following URL address: **https://molina.callidusinsurance.net/ICM/**

2) Enter your **Callidus username and password** and press **Login.** Keep mind, this must be an agent login (cannot use an agency login).

3) Select **Telephonic Enrollment** on the left navigation bar to open that *Telephonic Enrollment* menu.

4) Upload **Completed Telephonic Enrollment Form**.

Telephonic Enrollment Instructions (2 of 2)

5) Now that the application is in the queue perform a 3-way call with the beneficiary and Molina Telephonic Enrollment team at (866)714-8996, between the hours of 6 AM and 6 PM Mountain Standard Time, Monday – Friday. You will stay on the line while they complete the enrollment.

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

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Telephonic Enrollment FAQs (1 of 2)

Question	Response
What number do I call to perform a Telephonic SOA with my applicant?	Call Broker Services at (844) 885-3948 between the hours of 6 AM and 6 PM Mountain Standard Time, Monday – Friday.
How long does it take to complete a Telephonic SOA?	Roughly 3-5 minutes.
Where can I locate the Telephonic Enrollment Form?	In the Callidus portal: 1) Select the applicant's state's form template and download. 2) You only need to download this once, then edit for the applicant and save as another name.
Can I edit the Telephonic Enrollment Form within the browser window?	No, it will not save the edits. It is recommended that you download the file and edit using a PDF editor and then save it to your PC.

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Telephonic Enrollment FAQs (2 of 2)

Question	Response
What is the contact information for the Molina Telephonic Enrollment Support Team?	They are available Monday – Friday from 6 AM – 6 PM Mountain Time Telephone #: (866) 714-8996
What occurs during the call with the Molina Telephonic Enrollment Support Team?	• Verify the information provided • Review necessary CMS disclosures • Record the beneficiary's approval to enroll
How long does the Telephonic Enrollment call take?	Approximately 20 minutes.

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Thank you!

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