

Molina Healthcare Enrollment Options



Disclaimers

Agents must be ready to sell, means certified, contracted, licensed in the applicable states and appointed by Molina Healthcare, Inc. in accordance with state law prior to engaging in the sale of Molina Healthcare products.

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Enrollment Options

1 Paper Enrollments

2 DRX Enrollments

3 Telephonic Enrollment-Broker Support

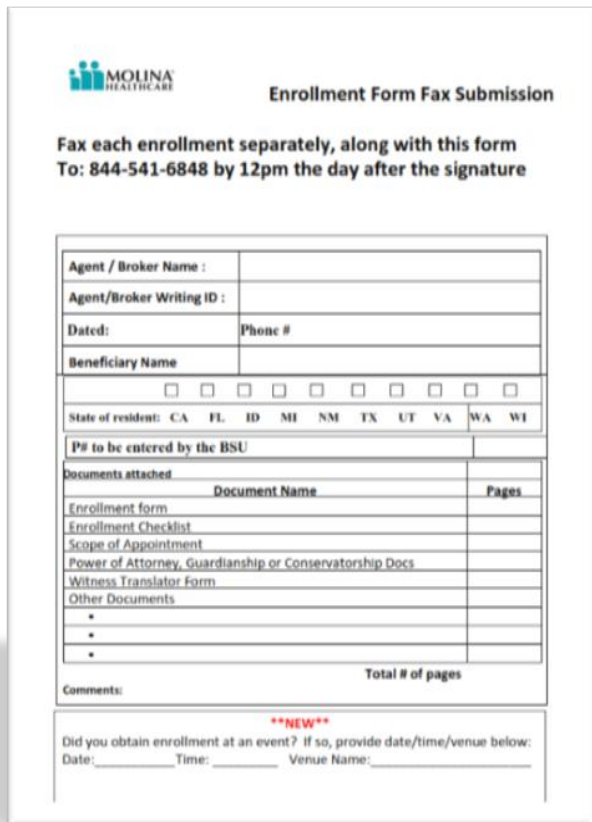
Paper Enrollments

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



Paper Enrollments (1 of 2)

- **First Step**: Submit the [Enrollment Fax Cover Sheet](#) as shown below.



MOLINA HEALTHCARE

Enrollment Form Fax Submission

Fax each enrollment separately, along with this form
To: 844-541-6848 by 12pm the day after the signature

Agent / Broker Name :	
Agent/Broker Writing ID :	
Dated:	Phone #
Beneficiary Name	
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	
State of resident:	CA FL ID MI NM TX UT VA WA WI
P# to be entered by the BSU	
Documents attached	
Document Name	Pages
Enrollment form	
Enrollment Checklist	
Scope of Appointment	
Power of Attorney, Guardianship or Conservatorship Docs	
Witness Translator Form	
Other Documents	
•	
•	
•	
Total # of pages	
Comments:	
NEW	
Did you obtain enrollment at an event? If so, provide date/time/venue below:	
Date: _____ Time: _____ Venue Name: _____	

Question

Where can I locate the paper Enrollment Form?

Where do I fax the paper Enrollment Form?

Response

The Broker can find the paper Enrollment Form in the back of the Enrollment Kit.

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



Enrollment Form

Please contact Molina Healthcare if you need information in another language or format (Braille).

To Enroll in Molina Medicare Complete Care, Please Provide the Following Information

You will be enrolling in:			
<input type="checkbox"/> WA H5823-006 HMO SNP \$0 to \$32.60 per month			
LAST Name:	FIRST Name:	Middle Initial:	<input type="checkbox"/> Mrs. <input type="checkbox"/> Mr. <input type="checkbox"/> Ms.
Birth Date: (MM/DD/YYYY)	Sex: <input type="checkbox"/> M <input type="checkbox"/> F	Home Phone Number: ()	Alternate Phone Number: ()
Permanent Residence Street Address (P.O. Box is not allowed):			
City:	County:	State:	ZIP Code:
Mailing Address (only if different from your Permanent Residence Address):			
Street Address:		City:	State: ZIP Code:
Emergency Contact:			
Phone Number:		Relationship to You:	
E-mail Address:			
Please Provide Your Medicare Insurance Information			
Please take out your red, white and blue Medicare card to complete this section.		Name (as it appears on your Medicare card):	
• Fill out this information as it appears on your Medicare card. – OR –		Medicare Number: _____	
• Attach a copy of your Medicare card or your letter from Social Security or the Railroad Retirement Board.		Is Entitled To HOSPITAL (Part A) _____ MEDICAL (Part B) _____ Effective Date: (MM/DD/YYYY) _____	
		You must have Medicare Part A and Part B to join a Medicare Advantage plan.	



Scope of Appointment Form

The Centers for Medicare and Medicaid Services requires agents to document the scope of a marketing appointment prior to any face-to-face sales meeting to ensure understanding of what will be discussed between the agent and the Medicare beneficiary (or their authorized representative). All information provided on this form is confidential and should be completed by each person with Medicare or his/her authorized representative.

Please initial below beside the type of product you are discussing with the agent.
(Refer to page 2 for product type descriptions)

☐ Medicare Advantage Prescription Drug Plans (Part C)

By signing this form, you agree to a meeting with a sales agent to discuss the types of products you initialed above. Please note, the person who will discuss the products is either employed or contracted by a Medicare plan. They do not work directly for the Federal government. This individual may also be paid based on your enrollment in a plan.

Signing this form does NOT obligate you to enroll in a plan, affect your current enrollment, or enroll you in a Medicare plan.

Please select the statement below that best describes your relationship to the person with Medicare listed on this Scope of Appointment form: *

- ☐ I am the person listed on this Scope of Appointment form.
- ☐ I am the person authorized to act on behalf of the individual listed on this Scope of Appointment form under the State where the individual resides.

☐ I understand that my submission (or submission of the person authorized to act on my behalf under the laws of the State where I live) of this Scope of Appointment means that I have read and understand the contents of this Scope of Appointment, and that I confirm that the information I have provided is accurate. If submitted by an authorized individual (as described above), this submission certifies that 1) this person is authorized under State law to complete this Scope of Appointment, and 2) documentation of this authority is available upon request by Medicare.

DRX Enrollments

2024 DRX User Training Guide

*This section of the presentation will cover
Frequently Asked Questions.*



DRX Electronic Enrollment FAQs (1 of 4)

<u>Question</u>	<u>Response</u>
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.

DRX Electronic Enrollment FAQs (2 of 4)

<u>Question</u>	<u>Response</u>
How do I link the SOA to the enrollment within the DRX SOA tab?	<ol style="list-style-type: none">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?	<p>Yes, you can do either, however, completing the enrollment electronically is much easier.</p> <p>By choosing to do the enrollment electronically, there is no need to complete a paper Enrollment Form. One enrollment method is sufficient.</p>
Does the applicant need a valid email address in order to process their enrollment?	<p>No, email address is not required for any of the enrollment options available.</p>

DRX Electronic Enrollment FAQs (3 of 4)

<u>Question</u>	<u>Response</u>
I would like to practice submitting an application to DRX. How can I do this?	<p>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:</p> <p><u>Link for 2024 Plans:</u> https://molina2.staging.destinationrx.com/PC/Agent</p> <p><u>At the initial login page:</u> Username: Molina_client Password: Molina123!</p> <p><u>At the DRX login page:</u> Username: CNX_testagent Password: testagent</p>

DRX Electronic Enrollment FAQs (4 of 4)

<u>Question</u>	<u>Response</u>
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 <i>before</i> 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.

DRX Telephonic Enrollment FAQs (1 of 2)

<u>Question</u>	<u>Response</u>
What scripting should be followed when completing Telephonic Enrollment?	<p>Brokers are to provide the below disclaimer verbally:</p> <p><i>"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."</i></p> <p>Provide this disclaimer within the first minute of the call. The disclaimer cannot be at the end with all the other disclaimers.</p> <p>Telephonic Enrollment Scripting is required when sales agent is submitting enrollment over the phone. All script in red print is required.</p> <p><u>2024 Medicare Telephonic Enrollment Call Guide</u></p>

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”

Beneficiary Signature

☐ Due to physical limitations, I am unable to sign my name

NOTE: if you are a broker entering a paper application in your possession, please check here and type 'paper application' in the name box that will appear

*Sign your name below using a stylus, mouse, or your finger.

For Telephonic Enrollments, check box "Due to physical limitations..." & type "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.*



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.

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

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.

Telephonic Enrollment FAQs (1 of 2)

<u>Question</u>	<u>Response</u>
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: <ol style="list-style-type: none">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.

Telephonic Enrollment FAQs (2 of 2)

<u>Question</u>	<u>Response</u>
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?	<ul style="list-style-type: none">• 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.

Thank you!

