Telephonic SOA & Enrollment Support 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 (Monday-Friday 6 am-6pm Mountain Standard Time), 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 Intake Form

Log in to Callidus

1. Open an internet browser and enter this URL address:
   https://molina.callidusinsurance.net/ICM/
2. Enter your Callidus username and password and press "**Sign In**". *This must be an agent login, not an agency login.*
   a. The User ID is the agent's writing number (less any alpha characters, i.e., 1234567)
   b. If need to recover password, click **Forgot Password.** An email will be sent to the email address on file for the agent.

3. Once in your Broker portal select **Telephonic Enrollment** from the left navigation bar.

4. Select the **State Enrollment Forms** to download and complete the form.
   - In the drop down select the state you are enrolling the beneficiary into.
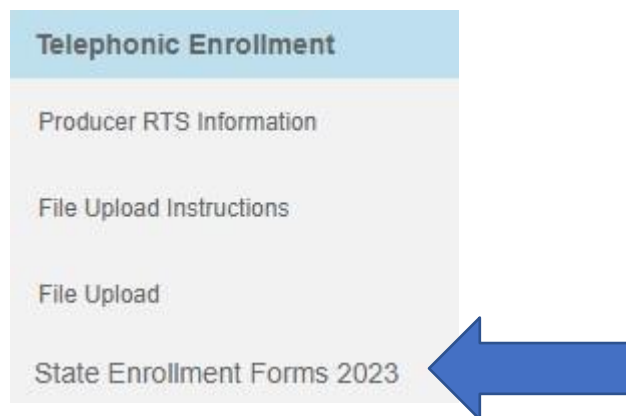
5. DOWNLOAD THIS FILE and save as a template on your local machine before filling it out so that changes can be saved before uploading a final copy for each client.
   - IMPORTANT: Do not fill out this form while in Callidus or in a browser window or it won't save

6. After completion of the form with the beneficiary you will save the document to your computer as a PDF (**Note:** Recommended naming convention of the document is: i.e., "Edward Johnson 01-20-2023 Telephonic Enrollment.pdf").

   - All uploads must be in PDF file format

7. Once the file is saved click on File Upload

   Reports

   History

   Telephonic Enrollment

   Producer RTS Information

   File Upload Instructions

   File Upload

8. Click on Upload a File

   File Upload

Name:			Mime Type:	
User Name:			Identifier:	

   Search   Clear   Upload a File

9. In the File Attachment screen click on Choose File

   Choose File | No file chosen

10. Once the File you have chosen is uploaded click Save.

    Save   New   Delete   Close

11. You are now ready to call the Telephonic Enrollment Support team.

- You will make a 3-way call with the beneficiary and the Molina Telephonic Enrollment Support team (866-714-8996) 6:00 AM – 6:00 PM Mountain Standard Time. You will stay on the line while they complete and the confirm the enrollment.

12. **Confirmation Email** – A confirmation email will be sent to the Broker informing them of the completed enrollment.

Frequently Asked Questions (FAQ)

1. **What happens during the 3-way Telephonic Enrollment to the Molina Telephonic Enrollment Support team?**
   - The Molina Telephonic Support Team member will be on a recorded line.
     They will:
     - verify the information provided.
     - read necessary CMS disclosures.
     - records the beneficiary's approval to enroll.
   - We recommend you prepare the beneficiary for the 3-way call with the Molina Telephonic Enrollment team.

2. **How long does the enrollment take?**
   - This typically takes approximately 20 minutes.

3. **What could prevent the enrollment from being completed?**
   - If the beneficiary refuses to complete the enrollment.
   - If the Broker is not Ready to Sell (RTS) in that state.
   - If the Broker uploads the forms and does not call in to do the 3- way call.

4. **What are the hours of the Molina Telephonic Enrollment team?**
   - 6:00 AM – 6:00 PM Mountain Time, M-F.
   - Phone number: 866-714-8996

5. **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 log in using an agent account and try again.
   - If the naming convention is too long or has symbols in the name

6. **When is the month-end cut off for uploading enrollment forms?**
   - Enrollment forms will be accepted up to, **noon pacific time on the last business day of the month** to allow enough time to complete the Telephonic Enrollment.

7. **How do I locate my Callidus username?**
   - 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.

8. **What are my options for submitting an enrollment to Molina?**
   - DRX (Electronic Enrollment) in person or email
   - Paper enrollment US postal mail or fax 844-541-6848
   - Telephonic Enrollment (see the instructions above)

9. **What are 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)

10. **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 the enrollment methods. It is recommended the broker keep a copy of the Telephonic SOA confirmation email for their records.