



How to Use Humana's IVR

Scope of Appointment Line

External & Direct Independent Agents

PURPOSE: Give External & Direct Independent Agents everything they need to complete the Pre- and Post-Appointment requirements for a Scope of Appointment using Humana's IVR system

PRE-APPOINTMENT STEPS:

- Agent and beneficiary must call the SOA IVR line **together**
- The IVR will prompt the agent and beneficiary through the call.
- **If the agent cannot push buttons during the three way call, check the following settings in the phone:**
 - In Cellular, open Enable LTE setting and set it to DATA ONLY
 - If the agent is still unable to push buttons, turn Wi-Fi off for duration of call

External & Direct Independent Agents - Scope of Appointment IVR phone number 866-945-4471

- 1 Press 1 for English or listen to Spanish instructions.
- 2 **Enter your 7-digit SAN.** Make sure it is correct when read back or you will not be able to access the SOA at a later date.
- 3 Select from options to disclose **when** the appointment is taking place.
- 4 Listen to product selections carefully and select **the product(s) agreed upon** between you and beneficiary.
- 5 Agent or the beneficiary must **enter their 10-digit phone number.** This phone number MUST be the same one the beneficiary uses when they enroll in the plan.
- 6 Agent or the beneficiary must **enter the last 4 digits of the beneficiary's SSN.** This is an important step as it helps when matching the SOA data to the prospect data and enables Humana to take multiple SOAs from the same phone number.
- 7 Select from options to explain how **initial contact** with the beneficiary was made.
- 8 The beneficiary must confirm the appointment. The **beneficiary** must state their **name, appointment time, appointment date, and products** to be discussed in the appointment.
- 9 **Capture the SOA telephonic signature.** In order to make this a valid scope of appointment, the beneficiary must verbally agree to the meeting to discuss the products they are interested in.
- 10 Make sure **the beneficiary listens to and agrees to the disclaimer.**
- 11 Listen for and **write down your 8-digit confirmation number.**