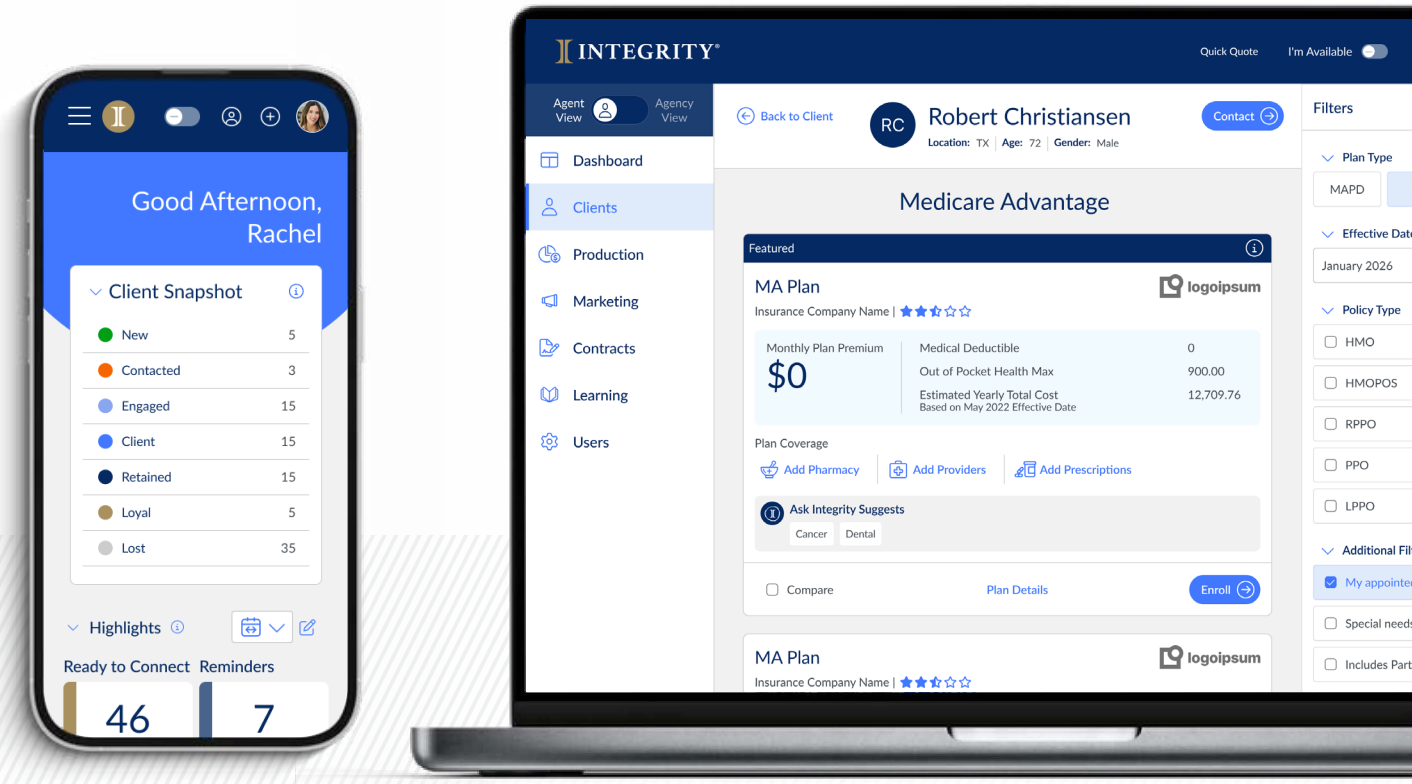
INTEGRITY®
CONNECT



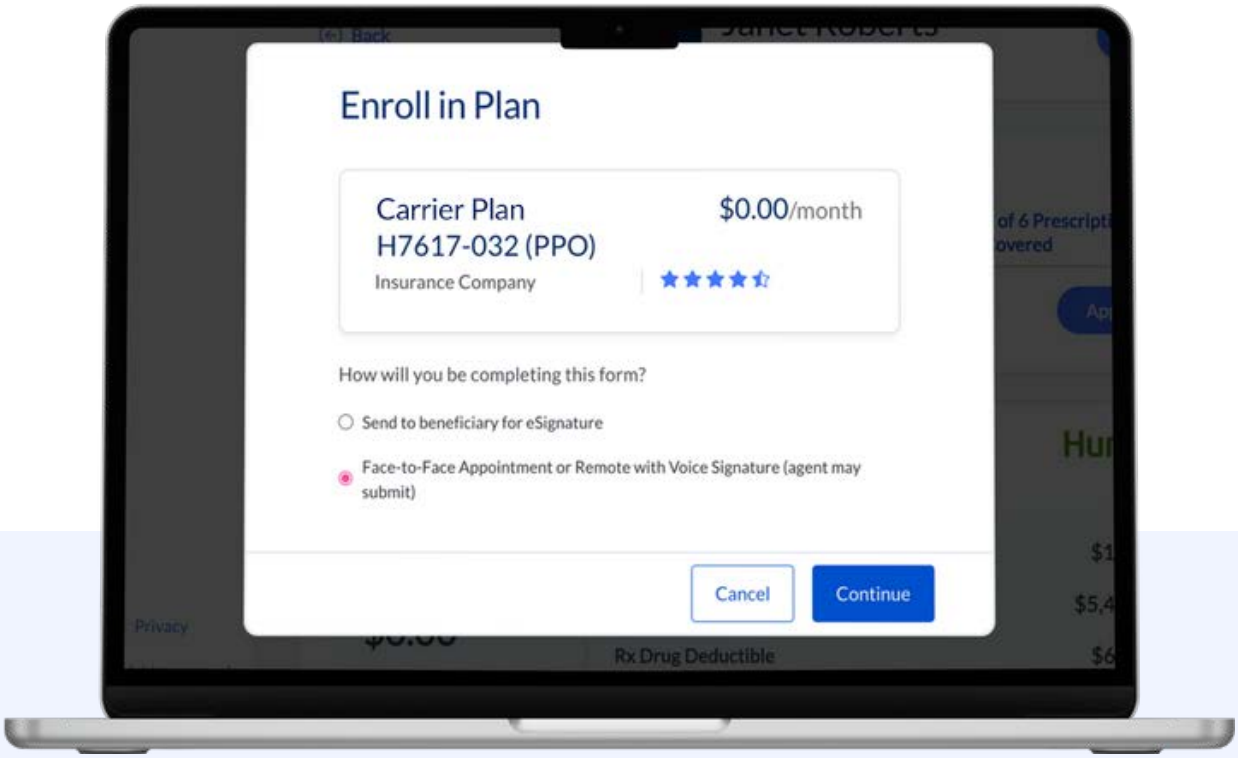
Voice Signature Guide

Voice Signature Guide

Enrolling in Plan

1. Click “Apply”, then choose one of the following signature options:
    a. Send to Beneficiary for eSignature – *Use this if the client will sign via* ***email or text only****.*
    b. Face-to-Face Appointment or Remote with Voice Signature – *Use this if you are* ***meeting the client face-to-face or plan to use a voice signature over a virtual appointment or phone call.*** *– In this case, the agent may submit the application.*

Important:
Make sure to select the correct option, as there are different prompts for each option. Use your Integrity Personalized Business Phone Number for free call recording. Recorded calls are stored for 10 years to be compliant with CMS requirements. This recording will not be sent to the carrier, but is stored and available for reference in case the carrier requests it. IntegrityCONNECT will also save a PDF of the application in the Activity section of the client profile.



Voice Signature Guide

Recording Permission Prompt

Recording Permission Prompt: The first question you'll see is: *"Do I have permission to record this enrollment?"*

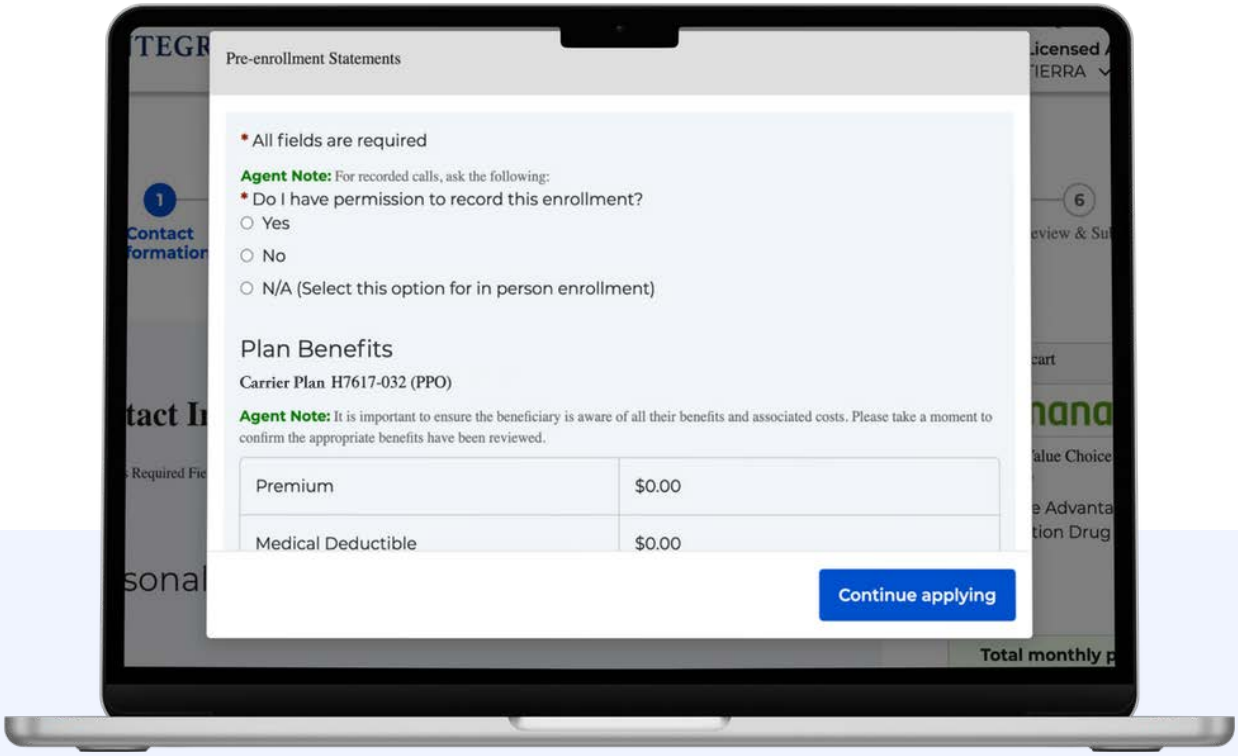
When to Ask for Permission

Phone Application: Let the client know that the call will be securely recorded to follow Medicare rules. Confirm they are comfortable with the call being recorded before proceeding.

In-Person Application: *You do not need to record. Select the "N/A" option to move forward.*

Plan Benefits

Next you'll be guided through the Plan Benefit Breakdown. Review each section with the applicant to ensure they understand the coverage and benefits. This is a requirement by CMS.



Voice Signature Guide

CMS Requirements: Reviewing Disclosures

Review of All Plan Benefits

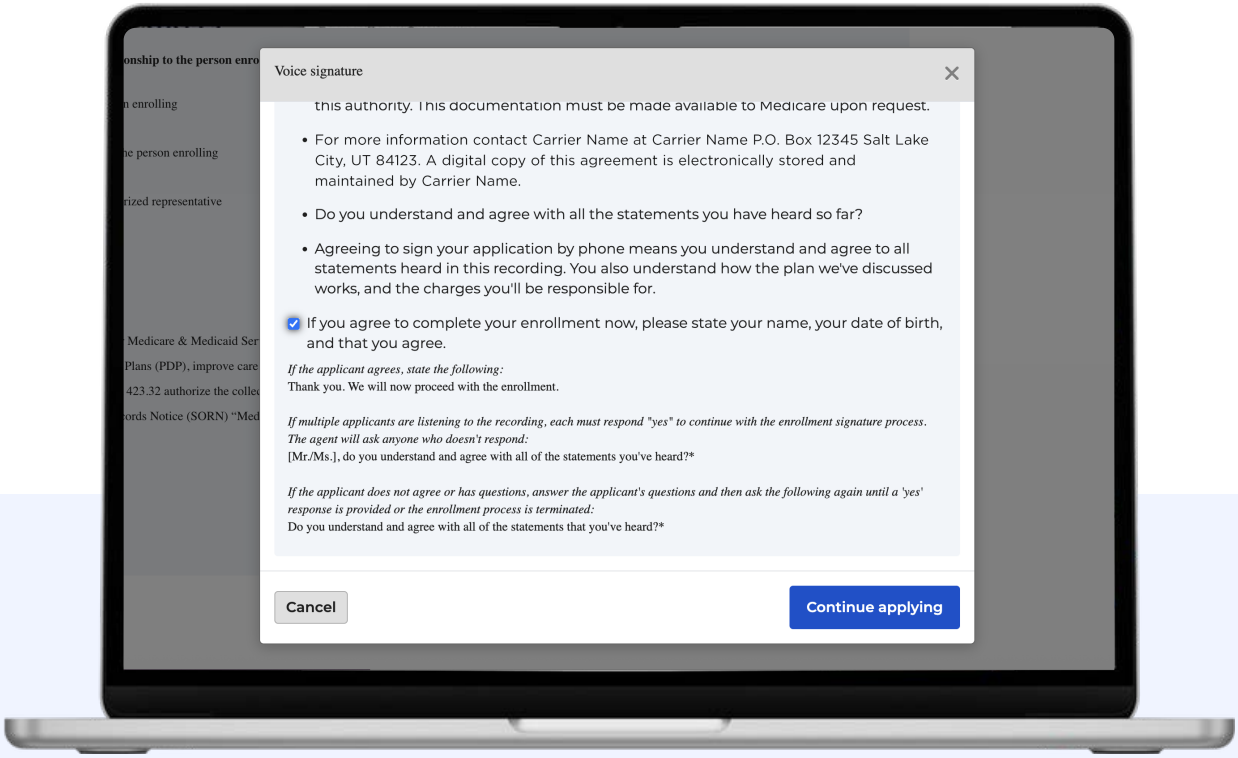
- Take the time to go over all plan benefits with your client – CMS requires this.
- Once you've completed the review, check the box confirming that you've done so.

Required Disclosures

The "Required Disclosures" section *must be read out loud* to your client.

- As you read each statement, check the corresponding box to confirm it was reviewed. This step is also a CMS requirement and must not be skipped.
- After completing both the Plan Benefits and Required Disclosures, click "Continue Applying" to move forward.

Important for Phone Appointments:
If this appointment is being conducted over the phone, *you must be on a recorded line before proceeding.*



Voice Signature Guide

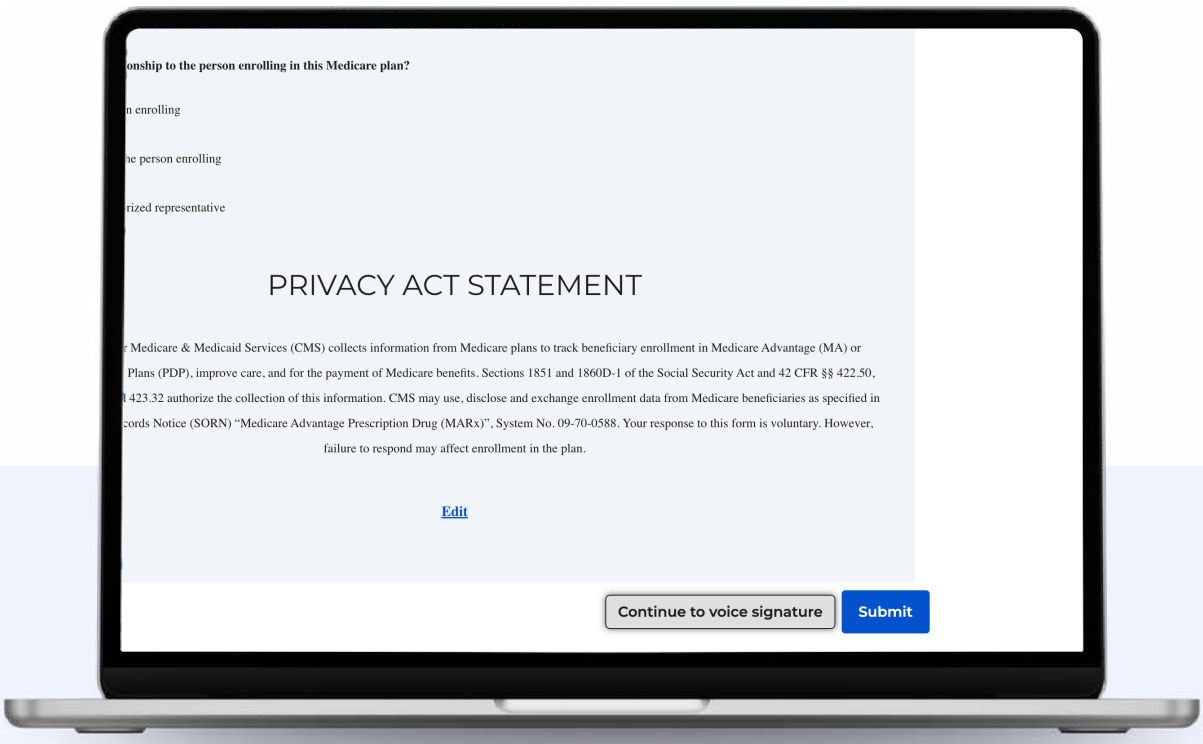
Submitting Voice Signature

Continue to Voice Signature

- Use this option only if the appointment is conducted over the phone (or a virtual appointment such as a video call).
- This step allows the client to complete the application using a voice signature.

Submit

- Use this option only if the appointment is held face-to-face (in person) — in this case you are collecting a physical signature and do not need a voice signature.
- In this case, you can submit the application directly without recording a voice signature.



Voice Signature Guide

Voice Signature Option

Read the Disclosure Statements

A set of disclosures will appear on your screen. Read each line in full to your client on a recorded line.

> » You cannot skip or paraphrase — every word must be read exactly as shown. If a carrier reviews your recorded call, they check that you read the disclaimers as shown.

Confirm Client Agreement

After reading all disclosures, select the option to confirm that the client agrees to the application.

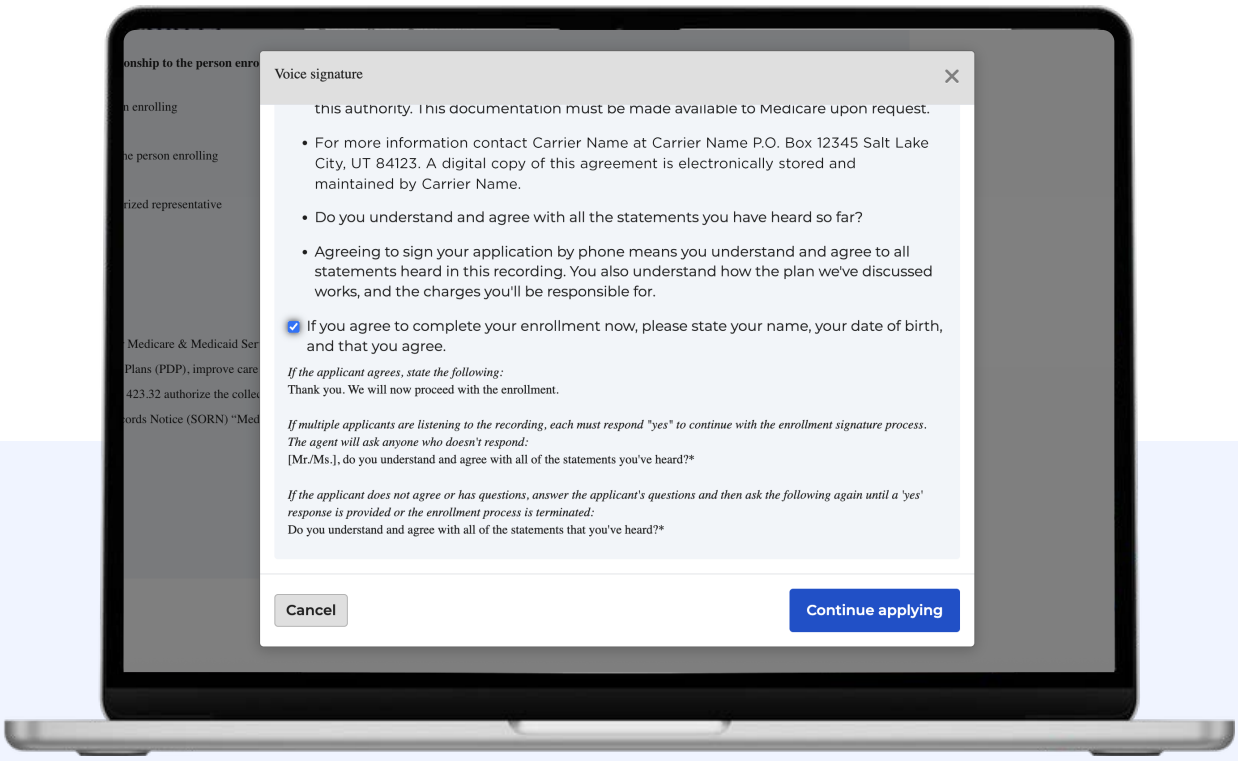
Client Verbal Confirmation

On the recorded line, the client must clearly state:

- Their full name
- Their date of birth
- That they agree to the application

Proceed

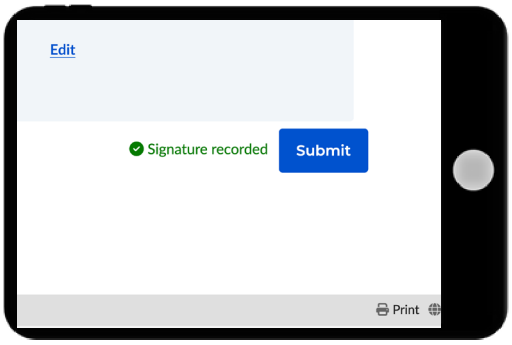
Once the client has provided verbal confirmation, click “Continue Applying” to move forward.



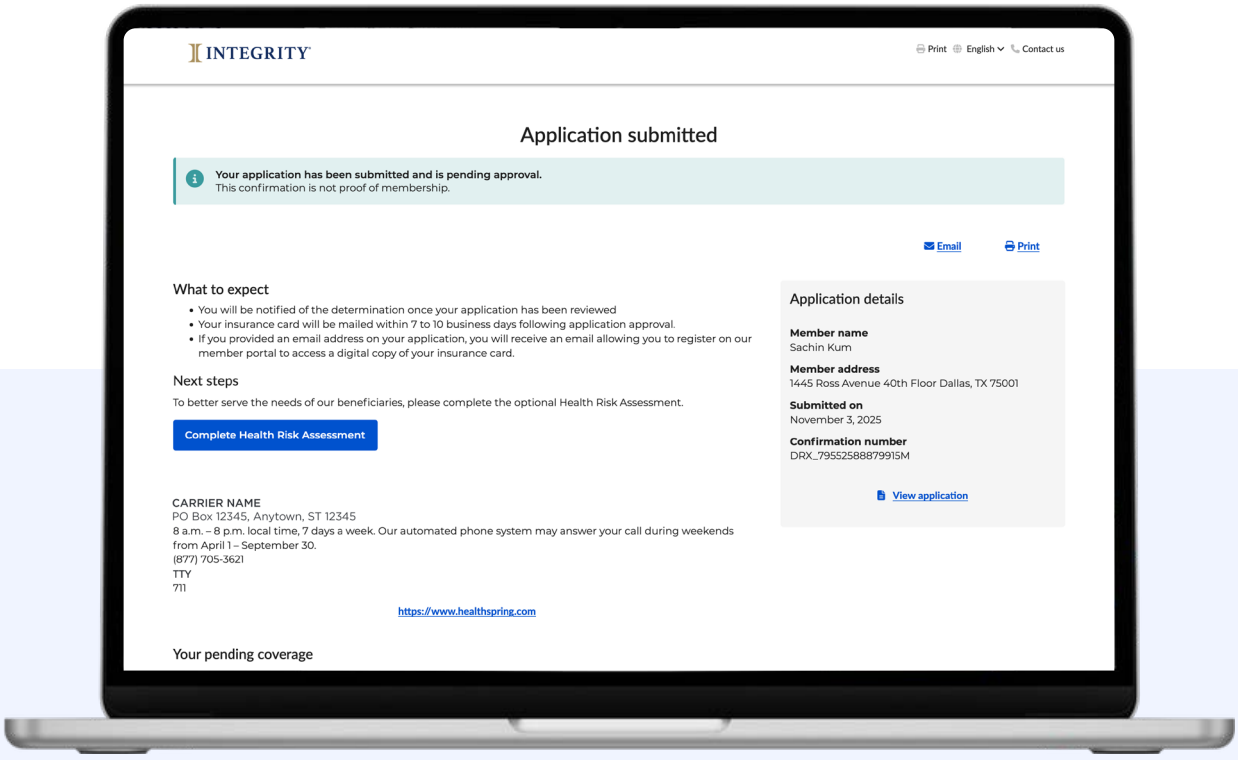
Voice Signature Guide

Confirmation of Application

Once you have completed the Voice Signature option, you will then see the confirmation that the Signature has been recorded. From here you can click on “Submit”.



Once you Submit your application, it will show confirmation of your application being submitted and that it is waiting for carrier approval.



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