

MEDICARE SALES CALL RECORDING FAQ

Who does the call recording requirement apply to?

The requirement applies to all organizations and individuals that fall under the definition of TPMO*. **This includes independent agents and brokers** involved in lead generation, marketing, sales, and enrollment functions.

When should I record the call with a beneficiary/client?

Agents **must record** all calls pertaining within **the scope of the chain of enrollment.**

Are Zoom calls and conversations through other virtual platforms required to be recorded?

Yes. Zoom calls and other calls using virtual presence technology between a Medicare beneficiary and an organization or individual who meets the definition of a TPMO* must be recorded.

Does the requirement to record calls apply to in-person interactions?

No. CMS does not require recording of in-person interactions.

What if my client refuses for the call to be recorded?

There are **no** exceptions to this requirement. If a beneficiary declines to be recorded, the call must end.

Does the requirement to record calls apply only to call centers?

No, it applies to all organizations and individuals that fall under the definition of TPMO*.

Can an agent complete a sale over the phone if the enrollee declines to be recorded?

No. If a beneficiary declines to have their call with a TPMO* recorded, the sales agent must end the call.

What technology or mechanism should agents use to record calls with beneficiaries?

We offer our contracted agents an all-in-one enrollment platform called **Health Plan Cart**. This platform includes a call recording feature. For more info visit

<https://insurancepros.com/medicare-shop-compare/>

How can I obtain a call recording?

Send an email request to **Connecture@iprosteam.com** with the name of your client and iPros will retrieve the audio file.

What happens if I fail to record a sales call?

You are at **risk** for a potential sales allegation, which may **impact your ability to sell Medicare products** in the future.

Bonus Tip

It is recommended that you use the disclaimer below upon starting a benefit-related call:

"I do not offer every plan available in your area. Any information I provide is limited to those plans I offer in your area. Please contact Medicare.gov or 1-800 MEDICARE to get information on all of your options."