

# SOLUTIONS FOR THE NEW CMS RECORDING & DISCLAIMER RULES



## RECORDING SOLUTIONS AND GUIDANCE

Sunfire and MyMedicareBot provide licensed agents with **FREE telephonic call recording** and storage capabilities in line with CMS's new call recording requirements and available now. For more information on these solutions, contact your marketer or IMO.

01



**Starting a call with an existing or prospective beneficiary**

Do I need to **record** the conversation?

**Yes, if the client agrees to be recorded**

02



**Do I need to provide the call recording to carriers?**

**Yes, if requested.**

**How long after the request do I need to provide recordings?**

**It varies from carrier to carrier.** Please note, however, that recordings must be stored for a minimum of 10 years.

03



**Starting a face-to-face meeting with an existing or prospective beneficiary**

Do I need to **record** the conversation?

**No, BUT...**

It remains **best practice** to keep accurate records of all existing and prospective beneficiary interactions

**What if the client does not consent to being recorded?**

You may remind them that new government regulations **require certain calls with Medicare beneficiaries be recorded** to maintain quality and ensure information relayed is accurate.

**What if they still do not consent to being recorded?**

You must politely **end the call.**

**What if they agree to being recorded?**

You may **acknowledge the call is being recorded** and proceed with the call.

# DISCLAIMERS GUIDANCE

01



## Starting a call with an existing or prospective beneficiary

Do I need to provide a **disclaimer**?

**Yes, within 60 seconds of each call**

### What's the disclaimer?

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

02



## Emailing an existing or prospective beneficiary

Do I need to provide a **disclaimer**?

**Yes, prominently on any communication or marketing materials**

### What's the disclaimer?

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

03



## Starting a face-to-face meeting with an existing or prospective beneficiary

Do I need to provide a **disclaimer**?

**No**

### Questions?

Connect directly with your marketer or email [Info@YourMedicare.com](mailto:Info@YourMedicare.com)

For more AEP guidance, **email inquiry to:** [Info@YourMedicare.com](mailto:Info@YourMedicare.com)