

## On-Exchange Application/Enrollment Steps

1. Read CMS Consent before searching Marketplace/Exchange (**Compliance**; customer must agree to proceed)
2. Complete application restating/confirming data entered.
3. Play On-Exchange Disclaimer recording before E-Signature and customer must state full name, today's date and they agree/yes (**Compliance**)
4. Ask customer if OK to E-sign and submit application.
5. Retrieve Eligibility notice going over any documents required and how to submit.
6. Review plan name(s), premium(s) and effective date.
7. Read second, shorter CMS Consent and customer must state full name, today's date and they agree/yes (**Compliance**)
8. Tell the customer that you are enrolling them and click "Enrollment" button.
9. Ask if they want to make payment (if allowed). If making payment, play the Payment Disclaimer recording and customer must state full name, today's date and agree/yes prior to taking payment (**Compliance**).

## Off-Exchange Application/Enrollment Steps

Note: CMS Consent is not needed. This is direct enrollment.

1. Complete application restating/confirming data entered.
2. Play Off-Exchange Disclaimer before E-Signature and customer must state full name, today's date and they agree/yes (**Compliance**).
3. Ask customer if OK to E-sign and submit application.
4. Review plan name(s), premium(s) and effective date.
5. Tell the customer that you are enrolling them and click "Enrollment" button.
6. Ask if they want to make payment (if allowed). If making payment, play the Payment Disclaimer recording and customer must state full name, today's date and agree/yes prior to taking payment (**Compliance**).

## Hold vs Mute

- **Hold** – Use this to play music while asking questions avoiding total silence or customer possibly overhearing conversations.
- **Mute** – Use this while playing Disclaimers.
- Do not mute while searching for information. Keep the conversation going by explaining to the customer what you are working on.