## HCSC CONNECTURE CALL RECORDING JOB AID 1.0

September 2022

ADVANCINGOUR PURPOSE

## **BCBS Call Recording – Job Aid 1.0**



Log into your Blue Access for Producer Portal @ www.bcbsxx.com/producer

- · Navigate to the "Medicare" icon and click to enter
- Click "Products & Forms"

MEDICA	RE PRODUCTS &	FORMS	Jung tu: 🕌 🛓		
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Step 2

Log into the Connecture platform using your NPN & Password

Note – First time users will be prompted to reset password



Step	3

Update your user profile if necessary and create beneficiary profiles from your dashboard

	_			
	8	Agent training	materials	
have no tasks for	this category			
1	have no tasks for	have no tasks for this category	have no tasks for this category	have no tasks for this category



Complete beneficiary profile and "Save". Note once the profile is saved, you will be able to search & find prospects from your dashboard

Personal information			Notes	Beneficiary Profile
*ZIP code 79912 County El Paso, TX			profile Add note	must include:
* First name	* Last name	Date of birth		1
Sample		10/01/1957	Tasks	1.Zip Code
Email address	Phone number		You have no tasks for this profile	
email@email.com	(915) 999-9999		O Add task	2 First Name
MBI	Hospital (Part A) effective date	Medical (Part B) effective date		
Show	Month 🛩 🛛 Year 🛩	Month 🖌 Vear 🛩		3.Last Name
Home address				4.Phone number
Address 1	Address 2			
City	State			
	¥			
Sales information				1
is the sales contact different beneficiary?	from the			
Yes	No			1

## **BCBS Call Recording – Job Aid 1.0**

Profile   Profile   Step   Director   Step   Click "Call beneficiary" (6a). Once beneficiary answers call, then read disclaimer to caller (6b) and click "Continue". See Steps 7.   Record your call   Start a recording for Sample Client   Named a drama dr	Click "Start call recording"	to begin the record	ling. See Step 6.	Step 7a	Record Call Only - Ensure recording This allows the conversation to be complete, click "End call". COMPLI	recorded. Once your call is
Profile  Personal information  Votes	HealthCARE co	🙆 Dashboard 🔍 Search profile	e ✔ 🖾 New profile ✔ 💄 Sample2 ✔		complete, click End call . COMPLI	EIE
Personal information Virgination of the service of		Profile	J Start call recording			
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Simple2 with determine the province number in the beneficiary coordine. 1929-9559 all beneficiary of coordine. 1929-9559 1929-9	El Paso, TX		O Add note			
This allows the conversation to be recorded. Once your enrollment is complete, click "Continue at apply". See Step 8. Click "Call beneficiary" (6a). Once beneficiary answers call, then read disclaimer to caller (6b) and click "Continue". See Steps 7. Record your call tast a recording for Sample Client read the following statement to the beneficiary searchy as it appears below <sup>4</sup> . This call will be recorded interest and read to other new provide read disclaimer to caller (6b) and click "Continue". See Steps 7. Step tast a recording for Sample Client read to following statement to the beneficiary searchy as it appears below <sup>4</sup> . This call will be recorded interest on the provide in the beneficiary searchy as it appears below <sup>4</sup> . This call will be recorded interest on the provide on table to get ormation on all of your options <sup>4</sup> . Your phone number will display as: (505) 551-3817 * and yugate the phone number in the beneficiary's profile. Step 8 Conce your call is complete, click "End call". COMPLETE *Note IL, OK, MT will display an 888 number. Call beneficiary Call in progress X end call Out of the recorded call". Completer			Taska	Step		-
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Start a recording for Sample Client Please read the following statement to the beneficiary exactly as it appears below <sup>®</sup> . This call will be recorded for quality and training purposes. I do not offer every plan available in your area. Any information we provide is limited to those plans I do offer in your area. Please contact Medicare gov or 1-800-MEDICARE to get information on all of your options. Your phone number will display as: (505) 551-3817 * Call the beneficiary's profile. (915) 929-9559 Call beneficiary (Gall beneficiary) (Gall beneficiary)	Click "Call beneficiary" (6		-			
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