

Your guide to Call Recording in MedicareCENTER

MedicareCENTER now provides free, compliant call recording and storage for Agents!

Why do agents need call recording?

CMS requires all Agents to record all their Medicare Advantage sales calls and store them for 10 years, beginning in AEP for Plan Year 2023.

How does the Call Recording feature work in MedicareCENTER?

As a MedicareCENTER Agent you will be assigned a free, unique, permanent MedicareCENTER Agent Phone Number. Calls made to and from your MedicareCENTER Agent Phone Number are routed through your device (cellphone, tablet, landline, VoIP).

Welcome, John!

MedicareCENTER now provides free, compliant, and automatic call recording and storage - per CMS requirements - for all your sales calls using your unique MedicareCENTER Agent Phone Number!

Your unique MedicareCENTER Agent Phone Number is

385-489-1670

All calls made TO and FROM your unique MedicareCENTER Agent Phone Number are:

- Recorded
- Accessible only to you
- Attached to your Contacts in Contact Management
- Stored by MedicareCENTER for 10 years per CMS regulation
- Downloadable to your personal device

Learn how to use your MedicareCENTER Agent Phone Number.

[Learn more](#)

Find your MedicareCENTER Agent Phone Number at any time in your MedicareCENTER Account

[View Account](#)

[Get Started](#)

The MedicareCENTER platform acts as a virtual operator, connecting the call between you and your Contact and recording the call in the background. When the call is over, the recording will be available in the MedicareCENTER Dashboard and/or the Contact Activity Stream.

Incoming Call: CALLER ID [Call Script](#) [Link to Contact](#)

Good Afternoon, Rachel

Confirmed Applications
20 Applied

Range: Current Month to Date [v](#)

*Includes applications from MedicareCENTER Medicare APP, and Medicare LINK.

Recent Activity

Date	Name	Activity	
04/26	801-867-5309	Incoming Call	Link to Contact Download ...
04/26	Robert Zimmerman	Call Recorded	Download ...
06/15	Paul Heusen	Reminder Added	...

Audra Victors

Client | Created Date 01/12/22

Stage

SOA Signed

Call Script

Email (Primary)

audralovesdogs@petsmart.com

Phone

(888) 467-1398

Address

900078 Washburn Ln, Cincinnati, OH, 41073

Overview
Details
Scope Of Appointments
Preferences

Add State/Zip to view plans

Reminders

+ Add New

Activity

+ Add New

Date	Activity	
09/07	Incoming Call Recorded	Download
01/12	Contact Created Contact Bulk Upload	

Incoming calls

When a Contact calls your MedicareCENTER Agent Phone Number, the MedicareCENTER Operator Number (254-271-0085) calls the phone number you provided on your account. Your phone will ring, and your caller ID will display the MedicareCENTER Operator Number. When you answer, you'll be connected to the Contact.

MedicareCENTER

Dashboard
Contacts
Learning Center
John Smith

Account

MedicareCENTER Agent Phone Number

385-489-1670

Personal Information

First Name

John

Last Name

Smith

National Producer Number (NPN)

400033

Email Address

first.lastname@fakeemail.com

Phone Number

555-555-5555

Save

00:45
254-271-0085

slide to answer

You'll see an incoming call notification in MedicareCENTER, no matter where you are in the site. This notification shows you the Contact's phone number and provides a link to a call script with the CMS-required disclaimers for you to read to the Contact.

The screenshot shows the MedicareCENTER dashboard. At the top, there's a navigation bar with 'Dashboard', 'Contacts', 'Learning Center', and 'John Smith'. Below this, a header bar indicates an 'Incoming Call: (555) 765-4321' with links for 'Call Script' and 'Link to contact'. The main section is titled 'Recent Activity' and contains a table with columns 'Date', 'Name', and 'Activity'. The table has two rows: one for '09/07' with name '(555) 123-4567' and activity 'Inbound Call', and another for '09/08' with name '(555) 765-4321' and activity 'Incoming Call'. Each row has 'Link to Contact' and 'Download' links. The 'Inbound Call' text in the first row is circled in red.

Date	Name	Activity		
09/07	(555) 123-4567	Inbound Call	Link to Contact	Download
09/08	(555) 765-4321	Incoming Call	Link to Contact	Download

You can easily link your incoming call to a new or existing Contact from the notification. You only need the Contact's first name, last name and phone number *or* email address to save a Contact, but the outbound call feature requires a phone number on the Contact record. Linking the call to a Contact closes the incoming call notification and makes the recording available in that Contact's Activity Stream.

This screenshot is similar to the previous one, but a mouse cursor is clicking the 'Link to contact' button in the header bar. The button is circled in red.

The screenshot shows the 'Link to contact' modal. At the top, it says 'Link to contact' and has a 'Call Script' button. Below this, the phone number '(555) 765-4321' is displayed. There's a 'Create New Contact' button. Under the heading 'Add to Existing Contact', there's a search input field with 'Al' entered. A dropdown list shows several names: 'Alaina Smith', 'Jane Donaldson', 'Randy Pearsall', 'Walter Black', 'Costella Albert', and 'Ralph Buchanan'.

If the call ends before you've linked it to a Contact, the incoming call notification will close and the call log will be added to the top of the Dashboard Activity stream in the Dashboard. You can link it to a contact from there.

Recent Activity				
Date	Name	Activity		
09/07	(555) 123-4567	Inbound Call	Link to Contact	Download
09/08	(555) 765-4321	Inbound Call	Link to Contact	Download
09/08	Alaina Smith	Outbound Call Recorded		Download

Outbound calls

Once you've saved a Contact in Contact Management, you can click their phone number in their Contact record to place a recorded call to them at any time. Clicking their phone number tells the MedicareCENTER Operator Number to connect a call between you and your Contact. MedicareCENTER's Operator Number will make the call to your phone first. Your caller ID will show your MedicareCENTER Agent Number. When you answer, the MedicareCENTER Operator Number will place a call to the Contact — also using your MedicareCENTER Agent Phone Number for the caller ID — and then connect you when they answer. The required call disclaimers will automatically be displayed in MedicareCENTER for you to read to the Contact.

MedicareCENTER

Dashboard | Contacts | Learning Center | John Smith

Alaina Smith
Prospect | Created Date 09/08/22

Stage: New

Call Script

Email: N/A

Phone (Primary): (555) 765-4321

Address

Overview Reminders + Add New

MedicareCENTER

Dashboard | Contacts | Learning Center | John Smith

Alaina Smith
Prospect | Created Date 09/08/22

Stage: New

Call Script

Email: N/A

Phone (Primary): (555) 765-4321

Address

Overview Reminders + Add New

Recorded Call Script

To be in compliance with CMS guidelines, please read this script before every call

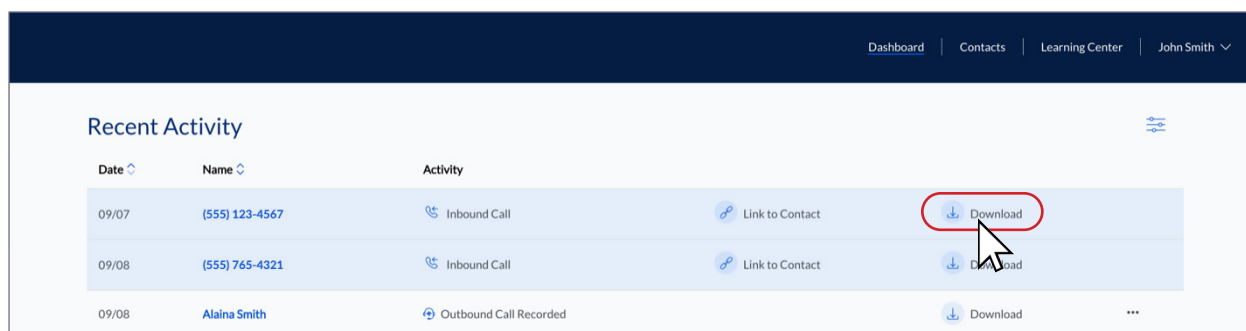
This call may be recorded for quality assurance or training purposes. We do not offer every plan available in your area. Any information we provide is limited to those plans we do offer in your area. Please contact Medicare.gov or 1-800-MEDICARE to get information on all of your options.

Activity

09/08	Incoming Call Recorded	Download
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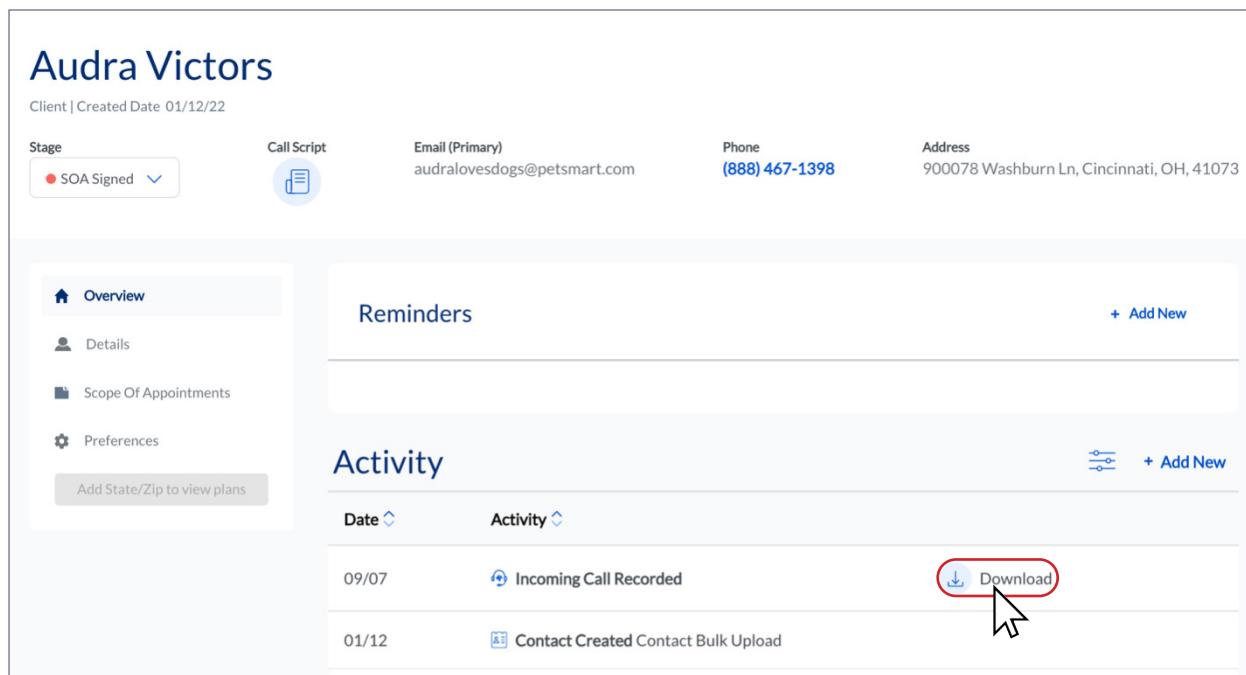
When the call is over, you can find the recording in your Contact's Activity Stream. You can make an outbound call from your MedicareCENTER Agent Phone Number at any time, to any Contact, and it will automatically be recorded. There is no limit to the number of Contacts you can have in Contact Management, and no limit to the number of recorded calls you can receive or place.

Incoming and outbound recorded calls are displayed as Activities, and incoming calls that are not yet linked to Contacts are displayed as a call log. You can download call recordings from here, as well as jump to a Contact's record.



Date	Name	Activity	
09/07	(555) 123-4567	Inbound Call	Link to Contact Download
09/08	(555) 765-4321	Inbound Call	Link to Contact Download
09/08	Alaina Smith	Outbound Call Recorded	Download ...

An activity is created for each recorded call you have with the Contact — inbound or outbound — and you can download the recording from here. You can also click to add notes to the activity.



Audra Victors
Client | Created Date 01/12/22

Stage: SOA Signed | Call Script | Email (Primary): audralovesdogs@petsmart.com | Phone: (888) 467-1398 | Address: 900078 Washburn Ln, Cincinnati, OH, 41073

Overview | Details | Scope Of Appointments | Preferences

Reminders: + Add New

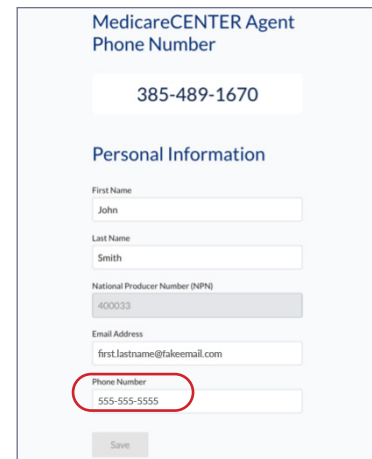
Activity | + Add New

Date	Activity	
09/07	Incoming Call Recorded	Download
01/12	Contact Created Contact Bulk Upload	

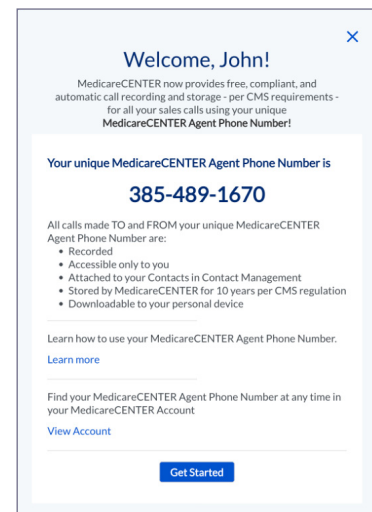
When you registered for your MedicareCENTER account, you provided a phone number. MedicareCENTER will create and assign your Agent Phone Number when you log in for the first time and will attempt to assign a number with an area code that corresponds to the phone number on your account. For example, if your account phone number is area code 801 (UT), you will be assigned a MedicareCENTER Agent Phone Number with area code 801, 435 or 385 — all of which are UT area codes — if there is one available. MedicareCENTER cannot create agent numbers with toll-free area codes. If the number on your account is toll-free, you will not be assigned a MedicareCENTER Agent Number until you update to a non-toll-free number.

Your MedicareCENTER Agent Phone Number will be displayed when you log in. This message will continue to be displayed each time you click back to the Dashboard page until you click the Get Started button. Your MedicareCENTER Agent Phone Number is also listed on your Account Profile page.

IMPORTANT: If you're using your cellphone, **make sure to add both your MedicareCENTER Agent Phone Number and the MedicareCENTER Operator Number (254-271-0085) to your phone's contacts list.** This will help ensure that your calls are connected correctly and that your Contacts have a good call experience.



The screenshot shows a form titled "MedicareCENTER Agent Phone Number". It displays the assigned number "385-489-1670". Below this is a "Personal Information" section with fields for "First Name" (John), "Last Name" (Smith), "National Producer Number (NPN)" (400033), and "Email Address" (first.lastname@fakeemail.com). The "Phone Number" field, containing "555-555-5555", is highlighted with a red circle. A "Save" button is at the bottom.



The screenshot shows a welcome message titled "Welcome, John!". It states: "MedicareCENTER now provides free, compliant, and automatic call recording and storage - per CMS requirements - for all your sales calls using your unique MedicareCENTER Agent Phone Number!". It then displays "Your unique MedicareCENTER Agent Phone Number is 385-489-1670". Below this, it lists features: "All calls made TO and FROM your unique MedicareCENTER Agent Phone Number are:" followed by a bulleted list: "Recorded", "Accessible only to you", "Attached to your Contacts in Contact Management", "Stored by MedicareCENTER for 10 years per CMS regulation", and "Downloadable to your personal device". There are links for "Learn how to use your MedicareCENTER Agent Phone Number." (Learn more) and "Find your MedicareCENTER Agent Phone Number at any time in your MedicareCENTER Account." (View Account). A "Get Started" button is at the bottom.

Marketing and prospecting with your MedicareCENTER Agent Phone Number

Replace your direct phone number with your MedicareCENTER Agent Phone Number on all your marketing materials — when Consumers call that number, the incoming calls will automatically be recorded and stored.

Make your outbound prospecting calls from your MedicareCENTER Agent Phone Number — when your contacts answer, the calls will automatically be recorded and stored — and when they return your call, it will be recorded and stored, too.

Downloading your recordings

You can download the recording of any call from the Contact's record, or from the activity log.

Recent Activity				
Date	Name	Activity		
09/07	(520) 241-0008	Inbound Call	Link to Contact	Download
09/08	(323) 326-4646	Inbound Call	Link to Contact	Download
09/08	Alaina Smith	Outbound Call Recorded		Download

Audra Victors

Client | Created Date: 01/12/22

Stage
SOA Signed

Call Script

Email (Primary)
audralovesdogs@petsmart.com

Phone
(888) 467-1398

Address
900078 Washburn Ln, Cincinnati, OH, 41073

- Overview
- Details
- Scope Of Appointments
- Preferences

Add State/Zip to view plans

Reminders

+ Add New

Activity

+ Add New

Date	Activity	
09/07	Incoming Call Recorded	Download
01/12	Contact Created Contact Bulk Upload	

The purpose of the Call Recording feature is to provide documentation of your compliant sales process to CMS/Carriers in the event of a Consumer complaint. In that event, you will be responsible for providing the call recording file. You may download any call recording to any of your devices at any time. However, please be aware that by *downloading the recording file to your device, you are assuming responsibility for the secure storage and handling of any of the Consumer's personal health information contained in the call recording.*

Storing your downloaded recordings

MedicareCENTER will store your call recordings for ten years from the date of the call. You do not have to download any of your call recordings unless you've been requested to provide them to CMS/carriers.

Deleting Contacts with recordings

If you delete a Contact record from MedicareCENTER Contact Management, you will remove your access to any call recordings linked to that Contact record. If you need access to a recording for a deleted Contact, you will need to contact MedicareCENTER Support.

Changing the number your MedicareCENTER Agent Phone Number routes to

You can change the phone number that your MedicareCENTER Agent Phone Number rings to (cellphone, tablet, landline, VoIP) by updating that phone number in your MedicareCENTER Account Profile. Changing your account phone number to one with a different area code will NOT change your assigned MedicareCENTER Agent Phone Number.

Getting a different MedicareCENTER Agent Phone Number

If your MedicareCENTER Agent Phone Number area code does not match your sales area, and you have a different forwarding number that does, please submit that information to support@medicarecenter.com.