



Integrated Telephony for Field Agents



REQUIREMENT

Effective **October 1, 2022** Field Agents will be required to record all beneficiary calls, which includes **pre-enrollment and post-enrollment calls in their entirety**. The recordings must be retained in a **HIPAA compliant** manner for 10 years.

Only in person, face to face appointments are excluded, however **any follow up calls related to sales and completing the enrollment process** must be recorded.

Additionally, a **new disclaimer** must be verbally conveyed within the first minute of a sales phone call.

SUNFIRE IS PROUD TO OFFER OUR BUILT IN-HOUSE TELEPHONY SOLUTION FULLY INTEGRATED WITH YOUR EXISTING WORKFLOW TO ENSURE YOU ARE COVERED FOR THIS AEP.

- DAVID GRAF, CEO



INBOUND & OUTBOUND DIALING

Purchase a virtual phone number and use it directly in SunFire or with conference calling functionality to talk through your personal cell phone.



RECORDING & STORAGE

Record conversations in a safe and HIPAA compliant manner. Various storage options based on call outcome.



REQUIRED DISCLOSURES

Integrated prompts within SunFire to ensure you have the tools you need to meet the requirement.



AND MORE...

Stay tuned for a demo video and webinar coming in **August** and be sure to keep in contact with your agency to have your telephony solution ready to launch for this AEP.

