



Complete Health Advisors

The Insurance You've Been Looking For

SVS TEXT TEMPLATES / AGENT REMINDERS

Marketplace/DashDoc LookUp Template

DASHDOC LOOK-UP

NAME:

DOB: MM/DD/YYYY

STATE:

Finish Enrollment Text:

Hi XXX, this is XXX with Complete Health Advisors, the agent you just spoke with. My direct line is XXXX. Please call back to complete your enrollment, thank you!

Disconnection Text:

Hello XXX, this is XXX with Complete Health Advisors. We somehow got disconnected. Please give me a call back on my direct line XXX to continue with your application. Thank you!

Spanish Text:

Hola XXX, soy XXX, con Complete Health Advisors. Seré su nuevo Agente de Registro. Mi número de NPN es XXX y mi línea directa es XXX, gracias.

Questions/Concerns Text:

Hello XXX, this is XXX, your licensed agent with Complete Health Advisors. My NPN number is XXX, our customer service number is (888) 949-2753, and our website is www.completehealthadvisors.com. Please do not hesitate to contact us for any questions or concerns.

Customer Service text:

Hello XXX, this is XXX, your licensed agent with Complete Health Advisors. Please reach out to our customer service team and they will get back to you. Their number is (888) 949-2753 and our website is www.completehealthadvisors.com. Please do not hesitate to contact us for any questions or concerns.

SSN Capture Request Template

SVS ASSISTANCE REQUEST:

NEED: SSN Capture

LID:

AGENT Reminders:

Always tag the agent

FFM Imigration reminder:

Hello @xxx, Your FFM integration is due soon or already past due. Failure to integrate in a timely fashion may result in temporary access to TLD being revoked. You must let me know the FFM is integrated by replying to this message, then you will be removed from the list. The verifiers cannot submit your apps without it so please do it ASAP.

CB NCO's and CHUB's:

Hey @XXX, Just a reminder to make sure we are calling back the NCO's and CHUB's as soon as we can. We don't want to miss these opportunities. You've got this!

MARX Checks:

First name:

Last Name:

DOB:

SSN:

TLD Notes:

Agent hung up before/during/after [XXX] Agent called/didn't CB, Approved/Unapproved- SVS initials