Navigator Outbound Call Recording

October 1,2022

Outbound Call Recording is here just in time for the 2023 Medicare AEP! The call recording feature is a part of Navigator and is not yet available in Tracker.

In Navigator, Call Recording can be turned on in the settings menu. Click on Settings, then Navio Dialer. Here you can turn call recording on and off for your account, and you can also see a listing of your last 100 recordings. From the listing, you can either play, download or delete each recording. If you'd like to turn on Call Recording for your appointment setter login, go to Setup/Appointment Setter.

Once Call Recording is turned on, all of your calls will be recorded. Inbound Call Recording is not yet available. You can turn Call Recording off on a call-by- call basis from the Navio Dialer box. If Call Recording is on, when you initiate a call, both you and/or your setter will be notified in the Navio Dialer box that your call is being recorded. For your convenience when making Medicare calls, we've also provided a CMS TPMO popup script for easy reading.

After completing your call, the recording will show in the Navio box below. Here, you can play, download or delete the recording. The recording will also show under Setup/Navio in the list of the 100 recent recordings.

If using the setter login, setters will not have access to turn off recording of their calls, nor will they have access to play, download or delete their recorded calls. Their recordings will be stored with the lead and accessible from the main user login as described above.

Through the end of AEP 2023, there will be no user cost for the call recording feature. We will be monitoring overall use and storage volume, and beginning in 2023, we may begin charging a fee. Early in 2023, you may be asked if you want to continue with Call Recording and you'll have to agree to or decline any applicable charges. Don't worry, your prior call recordings will not be lost.

If you're looking to call your final expense book of business, you will need to export your clients from Tracker in a .csv file and upload it to Navigator. Remember, we limit uploads to 500 records at a time. If you need assistance with this, please email us at support@senioragenttools.com.