

Scope of Sales Appointment Confirmation Form

The Centers for Medicare and Medicaid Services requires agents to document the scope of a marketing appointment prior to any individual sales meeting to ensure clear understanding of what will be discussed between the agent and the Medicare beneficiary (or their authorized representative). All information provided on this form is confidential and should be completed by each person with Medicare or his/her authorized representative.

Please initial below beside the type of product(s) you want the agent to discuss.
(Refer to page 2 for product type descriptions.)

<input type="checkbox"/>	Medicare Advantage Plans (Part C) and Cost Plans
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By signing this form, you agree to a meeting with a sales agent to discuss the types of products you initialed above. Please note, the person who will discuss the products is either employed or contracted by a Medicare plan. They do not work directly for the Federal government. This individual may also be paid based on your enrollment in a plan. Signing this form does NOT obligate you to enroll in a plan, affect your current or future enrollment, or automatically enroll you in a Medicare plan.

Beneficiary or Authorized Representatives Signature Date:	
Signature:	Signature Date:
If you are the authorized representative, please sign above and print below:	
Signature:	Your Relationship to the Beneficiary:
To be completed by Agent:	
Agent Name:	Agent Phone:
Beneficiary Name:	Beneficiary Phone:
Beneficiary Address:	
Initial Method of Contact: (Indicate here if beneficiary was a walk-in.)	

Agent's Signature:	
Plan(s) the agent represented during this meeting:	Date of Appointment::
For Plan Use Only:	
Agent, if the form was signed by the beneficiary at the time of appointment, provide reason why SOA was not documented prior to meeting:	
Medicare Advantage Plans (Part C) and Cost Plans	
<p>Medicare Health Maintenance Organization (HMO): A Medicare Advantage Plan that provides all Original Medicare Part A and Part B health coverage and sometimes covers Part D prescription drug coverage. In most HMOs, you can only get your care from doctors or hospitals in the plan's network (except in emergencies).</p>	
<p>Medicare Preferred Provider Organization (PPO) Plan: A Medicare Advantage Plan that provides all Original Medicare Part A and Part B health coverage and sometimes covers Part D prescription drug coverage. PPOs have network doctors and hospitals, but you can also use out-of-network providers, usually at a higher cost.</p>	

Scope of Appointment documentation is subject to CMS record retention requirements. eternalHealth is a HMO, PPO plan with a Medicare contract. Enrollment in our plans depends on contract renewal.