

Scope of Sales Appointment Confirmation Form



You can complete this Scope of Appointment one of 2 ways:

- Call Us at 1-866-398-6055
- Fax Us using the designated fax number provided by your agent.
Please make sure to include both page 1 and page 2

Beneficiary or authorized representative:

Name: _____ Relationship: _____

Signature: _____ Date: _____

Signing this form does **NOT** obligate you to enroll in a plan, affect your current or future enrollment, or enroll you in a Medicare plan.

<input type="checkbox"/>	STAND-ALONE MEDICARE PRESCRIPTION DRUG PLANS (PART D)	<input type="checkbox"/>	DENTAL/VISION/HEARING PLANS
Initial here		Initial here	
<input type="checkbox"/>	MEDICARE ADVANTAGE PLANS (PART C)	<input type="checkbox"/>	HOSPITAL INDEMNITY PLANS
Initial here		Initial here	
<input type="checkbox"/>	MEDICARE SUPPLEMENT (MEDIGAP) PLANS		
Initial here			

TO BE COMPLETED BY AGENT	
Agent name / Writing ID:	Beneficiary name:
Agent phone:	Beneficiary phone:
Agent's signature:	Beneficiary address:
Agent, if the form was signed by the beneficiary at time of appointment, provide explanation why SOA was not documented prior to meeting: <ul style="list-style-type: none"> <input type="checkbox"/> Immediate appointment requested / walk-in <input type="checkbox"/> Unplanned prospect <input type="checkbox"/> Telescope line closed / after hours <input type="checkbox"/> Children / caregivers have limited time 	Date appointment completed:
	Initial method of contact:
	Plan(s) the agent will represent during the meeting:

IF FAXING, PLEASE FAX THIS PAGE (PAGE 2) AS WELL.

STAND-ALONE MEDICARE PRESCRIPTION DRUG PLANS (PART D)

Medicare Prescription Drug Plan (PDP) - A stand-alone drug plan that adds prescription drug coverage to Original Medicare, some Medicare Cost Plans, some Medicare Private-Fee-for-Service Plans, and Medicare Medical Savings Account Plans.

MEDICARE ADVANTAGE PLANS (PART C) AND COST PLANS

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).

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.

Medicare Special Needs Plan (SNP) - A Medicare Advantage Plan that has a benefit package designed for people with special health care needs. Examples of the specific groups served include people who have both Medicare and Medicaid, people who reside in nursing homes, and people who have certain chronic medical conditions.

OTHER RELATED PRODUCTS

Dental/Vision/Hearing Products - Plans offering additional benefits for consumers who are looking to cover needs for dental, vision, or hearing. These plans are not affiliated or connected to Medicare.

Hospital Indemnity Products - Plans offering additional benefits; payable to consumers based upon their medical utilization; sometimes used to defray co-pays/co-insurance. These plans are not affiliated or connected to Medicare.

Medicare Supplement (Medigap) Products - Insurance plans that help pay some of the out-of-pocket costs not paid by Original Medicare (Parts A and B) such as deductibles and co-insurance amounts for Medicare approved services.

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