

**SCOPE OF SALES APPOINTMENT
CONFIRMATION FORM**



Thank you for agreeing to meet with a licensed insurance agent who is either employed by or contracted with Baylor Scott & White Health Plan. During your meeting, you are not required to enroll in a plan. The sales agent will not automatically enroll you in any plan you may discuss. Your current or future Medicare enrollment status will not be impacted.

Please initial below which type of product(s) you want the agent to discuss.	
<input type="checkbox"/>	Medicare Advantage Plans with Part D Prescription Drug Plans
<input type="checkbox"/>	Medicare Advantage Plans without Part D Prescription Drug Plans

Beneficiary or Authorized Representative signature, phone number and signature date:

_____ (_____) _____		
Signature	Phone Number	Signature Date

If you are the authorized representative, please sign above and print below:

_____	_____
Representative's Name (<i>printed</i>)	Your Relationship to the Beneficiary

To be completed by Agent:

If the form is signed by the beneficiary at time of appointment, provide an explanation why SOA was not signed prior to meeting.

_____	_____
Beneficiary Name	Beneficiary Phone

Beneficiary Address

Initial Method of Contact (indicate if beneficiary was a walk-in)

Where the walk-in took place (i.e., agent's office)

Plan(s) the agent represented during this meeting

_____	_____
Agent Name	Agent Phone

_____	_____
Date Appointment Completed	Agent Writing # or NPN

Agent Signature

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Plan Descriptions

Medicare Advantage Plans with Part D Prescription Drug Plans

- **Medicare Health Maintenance Organization (HMO) Plan** — A Medicare Advantage plan that provides all Original Medicare Part A and Part B health coverage and includes Part D prescription drug coverage. Except for emergency and urgent care situations, you can only get your care from doctors or hospitals in the plan's network.
- **Health Maintenance Organization (HMO) with added Point of Service (POS) benefits Plan** — An HMO plan that offers an additional, mandatory supplemental benefit, that allows the enrollee the option of receiving specified services outside of the plan's provider network.
- **Medicare Preferred Provider Organization (PPO) Plan** — A Medicare Advantage plan that provides all Original Medicare Part A and Part B health coverage and includes 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 Advantage Plans without Part D Prescription Drug Plans

- **Medicare Health Maintenance Organization (HMO) Plan** — A Medicare Advantage plan that provides all Original Medicare Part A and Part B health coverage but does not include Part D prescription drug coverage. Except in emergencies, you can only get your care from doctors or hospitals in the plan's network.
- **Health Maintenance Organization (HMO) with added Point of Service (POS) benefits Plan** - An HMO plan that offers an additional, mandatory supplemental benefit, that allows the enrollee the option of receiving specified services outside of the plan's provider network.

Agent Reminders:

The Scope of Appointment (SOA) is valid for 12 months following the date of beneficiary's signature date or the date of the beneficiary's initial request for information.

The SOA should be completed and agreed upon with the beneficiary at least 48 hours prior to the scheduled personal marketing, except for:

- SOAs that are completed during the last four days of a valid election period for the beneficiary.
- Unscheduled in person meetings (walk-ins) initiated by the beneficiary.

SOA distribution is prohibited at educational events.

SOA documentation is subject to CMS record retention requirements of 10 years.