

# 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 Scott and 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
<input type="checkbox"/>	Optional Supplemental Dental Insurance Plan
<input type="checkbox"/>	

**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:**

_____	_____
Beneficiary Name	Beneficiary Phone (optional)

\_\_\_\_\_

Beneficiary Address (optional)

\_\_\_\_\_

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

**Plan Use Only**

**Scope of Appointment (SOA) documentation is subject to CMS record retention requirements.**  
Agent: If the form was signed by the beneficiary at time of appointment, provide explanation why SOA was not documented prior to meeting.

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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 in emergencies, 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 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.

### Optional Supplemental Dental Plan

Plan offers additional benefits for consumers who are looking to cover needs for dental services. This plan is not affiliated or connected to Medicare. It is not a stand-alone dental plan.

Scott and White Health Plan and its subsidiary Insurance Company of Scott and White are Medicare Advantage organizations with Medicare contracts. Scott and White Health Plan offers HMO plans. Insurance Company of Scott and White offers PPO plans. Enrollment in Scott and White Health Plan or Insurance Company of Scott and White depends on contract renewal.

Dental insurance is provided by Metropolitan Life Insurance Company (MetLife). Each insurer has sole financial responsibility for its own products.

ATTENTION: If you speak English, language assistance services, free of charge, are available to you. Call 1-866-334-3141 (TTY: 711). ATENCIÓN: Si habla español, tiene a su disposición servicios gratuitos de asistencia lingüística. Llame al 1-866-334-3141 (TTY: 711). CHÚ Ý: Nếu bạn nói Tiếng Việt, có các dịch vụ hỗ trợ ngôn ngữ miễn phí dành cho bạn. Gọi số 1-866-334-3141 (TTY: 711).

Scott and White Health Plan complies with applicable Federal civil rights laws and does not discriminate on the basis of race, color, national origin, age, disability, or sex. Scott and White Health Plan cumple con las leyes federales de derechos civiles aplicables y no discrimina por motivos de raza, color, nacionalidad, edad, discapacidad o sexo. Scott and White Health Plan tuân thủ luật dân quyền hiện hành của Liên bang và không phân biệt đối xử dựa trên chủng tộc, màu da, nguồn gốc quốc gia, độ tuổi, khuyết tật, hoặc giới tính.