

Scope of Medicare Advantage & Part D Sales Appointment Confirmation Form

To be completed by person with Medicare Eligible Beneficiary

Please **place your initials below** in the box beside the plan type(s) that you want the agent to discuss with you.

If you do not want the agent to discuss a particular plan type, please leave the box empty.

(Please note that an agent may also discuss another insurance carrier's Medicare Supplement policy with you.)

Stand-alone Medicare Prescription Drug Plans (Part D)

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

Medicare Advantage (Part C), Medicare Advantage Prescription Drug Plans, and other Medicare Plans

Medicare Health Maintenance Organization (HMO) Plan — A Medicare Advantage Plan that must cover all Part A and Part B health care. In most HMOs, you can only go to doctors, specialists, or hospitals in the plan's network except in an emergency.

Medicare Preferred Provider Organization (PPO) Plan — A type of Medicare Advantage Plan available in a local or regional area in which you pay less if you use doctors, hospitals, and providers that belong to the network. You can use doctors, hospitals, and providers outside of the network for an additional cost.

Medicare Point of Service (POS) Plan — A type of Medicare Advantage Plan available in a local or regional area which combines the best feature of an HMO with an out-of-network benefit. Like the HMO, members are required to designate an in-network physician to be the primary health care provider. You can use doctors, hospitals, and providers outside of the network for an additional cost.

Medicare Special Needs Plan (SNP) — A special type of Medicare Advantage Plan that provides more focused and specialized health care for specific groups of people, such as those who have both Medicare and Medicaid, who reside in a nursing home, or have certain chronic medical conditions.

Dental/Vision/Hearing Products

These plans offer 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

These plans offer additional benefits that are payable to consumers based upon their medical utilization, and are sometimes used to defray copays or coinsurance. These plans are not affiliated or connected to Medicare.

EXCEPTION POLICY

If it is not feasible to obtain the Scope of Appointment prior to the agent scheduling a face-to-face appointment, agent may have beneficiary sign the form at the beginning of the meeting – documentation (see page 2) is required on why it was not feasible to obtain the Scope of Appointment prior to the appointment.

Documentation:

By signing this you are agreeing to a sales meeting with a licensed insurance agent to discuss the specific types of products you initialed above. The person that will be discussing plan options with you is either employed or contracted by a Medicare health plan or prescription drug plan that is not the Federal government, and they may be compensated based on your enrollment in a plan.

Signing this does NOT affect your current enrollment, nor will it enroll you in a Medicare Advantage Plan, Prescription Drug Plan, or other Medicare plan.

Beneficiary Signature: _____ **Date:** _____

*If you are the **authorized representative**, you must sign above and provide the following information:*

Name: _____ *Date:* _____

Address: _____

Phone number: _____

Relationship to 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 Use Only:]	

AO-63c Scope of Appt