

Scope of Appointment

A Scope of Appointment is required for all sales appointments. Submit the SOA once you have received it from the beneficiary.

1. Sending the SOA to the beneficiary: Email or Text options available

SOAs

✓ Email sent to CrnstoneMedCtr@yahoo.com on 10/29/2020

 Print consumer form |  Upload

Email address

CrnstoneMedCtr@yahoo.co

Email SOA

Phone number

Text SOA

2. Based on the option chosen, either a link or an email is sent to the beneficiary to take action to complete the SOA.

Hi Matt,

I am looking forward to meeting with you...

Please fill out the Scope of Appointment online form. Be sure to select the Medicare health plan options that you are interested in discussing during our visit. It's important that you complete the form prior to our visit since it is required by the Centers for Medicare and Medicaid Services.

[Complete "Scope of Appointment" form](#)

MATT FRY
MATT.FRY@CORNERSTONESENIORMARKETING.COM
(614) 763-2247

3. The beneficiary completes the generic SOA for the products they wish to discuss, adding their personal information, and then clicking SUBMIT FORM, after acknowledging the disclosures.

*City

*State

*Zip Code

Phone Number

Are you the authorized representative acting on behalf of the beneficiary?

- * ☒ By checking this box, I have read and understand the contents of the Scope of Appointment form, and that I confirm that the information I have provided is accurate. If submitted by an authorized individual (as described above), this submission certifies that 1) this person is authorized under State law to complete the Scope of Appointment form, and 2) documentation of this authority is available upon request by Medicare.

Submit form

4. The broker will receive a system generated email when a beneficiary completes their portion of the SOA instructing them to log into the system to complete the agent portion.

Customer completed SOA



Do.Not.Reply@drx.com
To: Matt Fry

If there are problems with how this message is displayed, click here to view it in a web browser.
Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

Right-click or tap and hold here to download pictures. To help protect your privacy, Outlook prevented automatic download of this picture from the Internet...



Matt Fry completed the SOA

Products to discuss:

Stand alone Medicare Prescription Drug Plans Part D
Medicare Advantage Plans Part C and Cost Plans
Medicare Supplement Medigap Products
Ancillary Products

Log in to view SOA

5. To complete the SOA:
 - a. Log into the system
 - b. Retrieve the clients profile
 - c. Navigate to the SOA page
 - d. Click 'Complete form'

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SOAs

☒ Completed by Matt Fry on 10/29/2020

- Ancillary Products
- Medicare Advantage Plans Part C and Cost Plans
- Medicare Supplement Medigap Products
- Stand alone Medicare Prescription Drug Plans Part D


[Complete form](#)

6. Complete all required fields on the form including the signature field and checking the disclosure acknowledgement box, both new for 2021. Click 'Submit broker form'.

Plan(s) represented during this meeting:

Date Appointment Completed*

☒ By checking this box, I confirm the information represented here is true and accurate. I authorize my signature on the Scope of Appointment form using this information.



clear

7. A 'completed' acknowledgement will display confirming the SOA has been successfully completed. Click the 'View' option to access a PDF version of the completed SOA.

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SOAs

 Completed 10/29/2020

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- Medicare Supplement Medigap Products
- Stand alone Medicare Prescription Drug Plans Part D

 View

