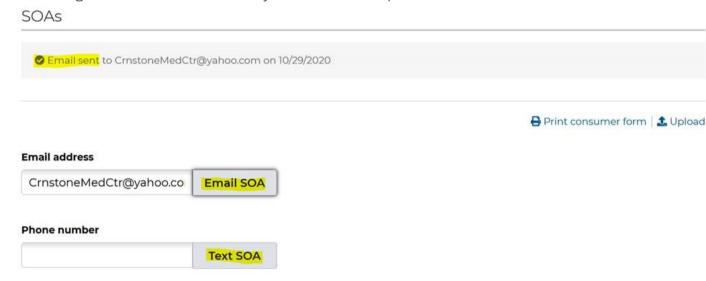
# Medicare CENTER



### 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



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.

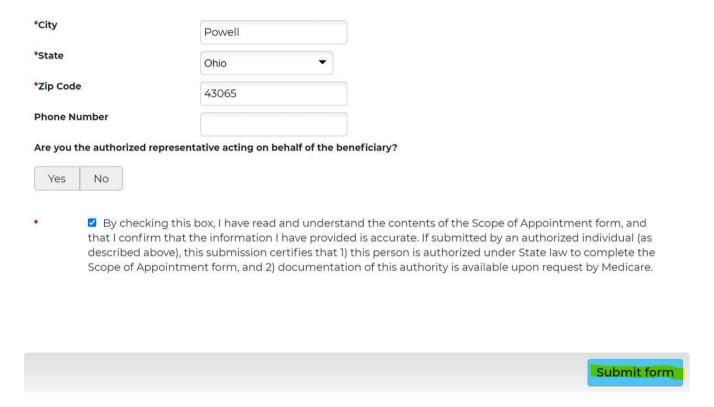
Complete "Scope of Appointment" form

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

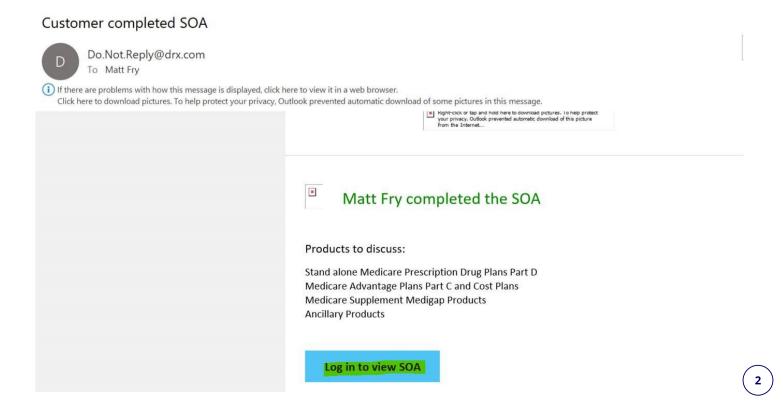


### Scope of Appointment

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.



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.





### Scope of Appointment

Complete form

- 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'

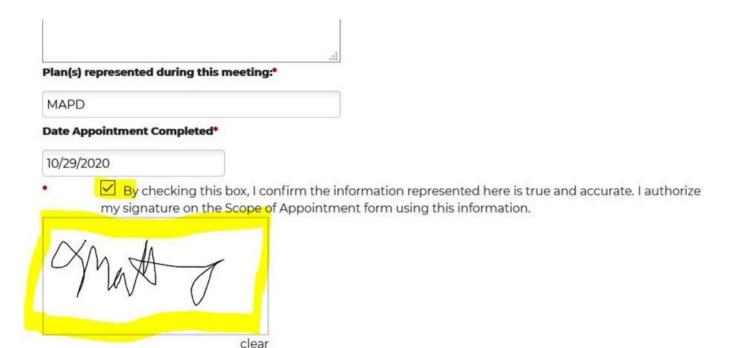
#### Scope of Appointment

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

SOAs

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

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'.





## Scope of Appointment

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.

#### Scope of Appointment

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

#### SOAs

Ompleted 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



