



CMS COMPLIANCE · PRE-APPOINTMENT

Scope of Appointment

Complete before an individual Medicare sales appointment to document which product categories the beneficiary agrees may be discussed.

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Signing this form does not require enrollment, does not change current or future Medicare enrollment, and does not automatically enroll you in a plan.

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PRODUCTS TO DISCUSS

- ☐ Stand-alone Medicare Prescription Drug Plans
- ☐ Medicare Advantage / Medicare Health Plans
- ☐ Medicare Supplement Products
- ☐ Dental / Vision / Hearing Products
- ☐ Hospital Indemnity Products
- ☐ Other permitted product category (describe below)

Part D

Medigap

OTHER PRODUCT CATEGORY

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BENEFICIARY AUTHORIZATION

By signing below, I agree to meet with a licensed sales agent to discuss only the product categories selected above. If I later request discussion of a different product type, additional Scope of Appointment documentation may be required.

BENEFICIARY / AUTHORIZED REPRESENTATIVE SIGNATURE

SIGNATURE DATE

REPRESENTATIVE NAME (IF APPLICABLE)

RELATIONSHIP



Scope of Appointment

Agent and appointment documentation.

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APPOINTMENT & AGENT INFORMATION

LICENSED AGENT NAME

AGENT PHONE

AGENT NPN / IDENTIFIER

BENEFICIARY NAME

BENEFICIARY PHONE

APPOINTMENT DATE

BENEFICIARY ADDRESS

APPOINTMENT METHOD (IN-PERSON / PHONE / VIDEO)

INITIAL METHOD OF CONTACT (NOTE WALK-IN IF APPLICABLE)

PLAN(S) / ORGANIZATION(S) REPRESENTED DURING MEETING

DATE APPOINTMENT COMPLETED

AGENT SIGNATURE

IF SOA WAS NOT DOCUMENTED PRIOR TO APPOINTMENT, EXPLAIN REASON / EXCEPTION



BENEFICIARY REFERENCE

Product Type Reference

Plain-language summaries for the beneficiary's reference. These descriptions are educational and do not constitute a plan recommendation.

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PRODUCT DEFINITIONS

Prescription Drug Plan

PDP

Stand-alone prescription coverage that can be used with Original Medicare and certain Medicare health-plan arrangements.

Medicare Advantage / Health Plans

Private Medicare plan options that provide Part A and Part B benefits; many also include Part D. Network, referral, and out-of-network rules vary by plan type.

Special Needs Plan

SNP

A Medicare Advantage plan designed for certain groups, such as people with both Medicare and Medicaid, certain chronic conditions, or qualifying institutional needs.

Medicare Supplement

Medigap

Supplemental insurance designed to help pay certain out-of-pocket costs in Original Medicare. It is not Medicare Advantage.

Dental / Vision / Hearing

Separate or supplemental coverage for dental, vision, or hearing services. These products are not Original Medicare.

Hospital Indemnity

Supplemental coverage that may pay fixed benefits based on covered hospital or medical utilization; it is not Medicare.