

Scope of Sales Appointment Confirmation Form

The Centers for Medicare and Medicaid Services requires agents to document the scope of a marketing appointment prior to any face-to-face sales meeting to ensure understanding of what will be discussed between the agent and the Medicare beneficiary (or their authorized representative). All information provided on this form is confidential and should be completed by each person with Medicare or his/her authorized representative.

Please initial below beside the type of product you want the agent to discuss.

_____ **Tribute Advantage Dual Eligible (Medicare and Medicaid) Plan**

_____ **Tribute Select Institutional Special Needs Plan**

By signing this form, you agree to a meeting with a sales agent to discuss the types of products you initiated above. Please note, the person who will discuss the products is employed or contracted by a Medicare plan. They do not work directly for the Federal government. This individual may also be paid based on your enrollment in a plan. Signing this form does NOT obligate you to enroll in a plan, affect your current or future enrollment status, or automatically enroll you in the plan(s) discussed.

Beneficiary or Authorized Representative Signature and Signature Date:

Signature

Signature Date:

If you are the authorized representative, please sign above and print below:

Name

Relationship

Agent Name

Agent Phone

Beneficiary Name

Beneficiary Phone (Optional)

Beneficiary Address (Optional)

Initial Method of Contact (Indicate here if beneficiary was a walk-in)

Agent's Signature

Plan the Agent Represented During this Meeting

Date Appointment Completed:

Plan Use Only:

Agent, if the form was signed by the beneficiary at time of appointment provide explanation why SOA was not documented prior to appointment: _____

Scope of Appointment documentation is subject to CMS record retention requirements.

Medicare Advantage Plans (Part C) and Cost Plans

Medicare Advantage - Prescription Drug Plan (MAPD) - A Medicare Advantage Plan that provides Medicare health and drug benefits to Medicare Beneficiaries.

Medicare Institutional Special Needs Plan (I-SNP) - A Medicare Advantage Plan that is available to anyone with Medicare who meets the Skilled Nursing Facility (SNF) level of care and resides in a nursing home.

Medicare Dual Special Needs Plan (D-SNP) - A Medicare Advantage Plan that is available to anyone who has both Medical Assistance from the State and Medicare.

Tribute Select (HMO-POS I-SNP) is a health plan with a Medicare contract. Enrollment in Tribute Select depends on contract renewal.

Tribute Advantage (HMO-POS D-SNP) is a health plan with a Medicare Contract and a contract with the State Medicaid Program. Enrollment in Tribute Advantage depends on contract renewal.