

# Scope of Sales Appointment Confirmation Form

To be completed by person with Medicare or Authorized Representative.

Please initial below in the box beside the plan type that you want the agent to discuss with you. If you do not want the agent to discuss a plan type with you, please leave the box empty. (Please note that an agent may also discuss a Medicare Supplement policy with you.)

<input type="checkbox"/>	<b>Stand-alone Medicare Prescription Drug Plans (Part D)</b>
	<i>Medicare Prescription Drug Plan (PDP)</i> – 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.
<input type="checkbox"/>	<b>Medicare Advantage (Part C), Medicare Advantage Prescription Drug Plans, and other Medicare Plans</b>
	<i>Medicare Health Maintenance Organization (HMO)</i> – 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.
	<i>Medicare Preferred Provider Organization (PPO) Plan</i> – 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.
	<i>Medicare Private Fee-For-Service (PFFS) Plan</i> – A type of Medicare Advantage Plan in which you may go to any Medicare-approved doctor or hospital that accepts the Plan’s payment and terms and conditions.
	<i>Medicare Special Needs Plan (SNP)</i> – 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.
	<i>Medicare Medical Savings Account (MSA) Plan</i> – MSA Plans combine a high deductible Medicare Advantage Plan and a bank account. The Plan deposits money from Medicare in the account. You can use it to pay your medical expenses until your deductible is met.
	<i>Medicare Cost Plan</i> – A type of health plan. In a Medicare Cost Plan, if you get services outside of the Plan’s network without a referral, your Medicare-covered services will be paid for under the Original Medicare Plan (your Cost Plan pays for emergency services, or urgently needed services).

By signing this you are agreeing to a sales meeting with a sales agent to discuss the specific types of products you initialed above. The person that will be discussing Plan options with you is not employed by the Federal government but is employed or contracted by a Medicare Health Plan or Prescription Drug Plan, 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 \_\_\_\_\_

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

**PLEASE PRINT**

Name (First\_Last) \_\_\_\_\_

Address \_\_\_\_\_

Phone number \_\_\_\_\_

Relationship to Beneficiary \_\_\_\_\_

**PLEASE PRINT**

*To be completed by Agent*

<b>Agent Name (First_Last)</b>	<b>Agent Phone</b>
<b>Agent ID #</b>	<b>Date of Appointment</b>
<b>Beneficiary Name (First_Last)</b>	<b>Beneficiary Phone</b>
<b>Beneficiary Address</b>	
<b>Agent's Signature</b>	

*To be completed by Agent, if Scope of Appointment was obtained at time of appointment:*

**Reason SOA was not completed prior to Appointment – please check all that apply**

- Unplanned Attendee
- Walk-In
- New SOA required (*consumer requested other Health Product information*)
- Other

If Other, please explain \_\_\_\_\_

**To submit Scope of Appointment documents:**

Send Email To: **scopeappt@uhc.com**; no subject line or body of email required.

Include one PDF per email. Do not attach any other documents.

**OR**

Send Fax To: **877.825.1914**

Plan is insured or covered by UnitedHealthcare Insurance Company or one of its affiliates, a Medicare Advantage organization with a Medicare contract and a Medicare-approved Part D sponsor.