

## Telework Technology Tip

# Stay fully compliant while teleworking with our Electronic Scope of Appointment

**Scope of Appointment is a CMS requirement. An insurance agent must obtain a Scope of Appointment from beneficiaries to discuss only those products agreed upon in advance.**

Completing a SOA online with a beneficiary online is quick and easy.

- Use the Indiana University Health Plans' SOA capabilities to stay fully compliant
- Keep SOAs stored safely online as required by CMS even if an enrollment does not take place

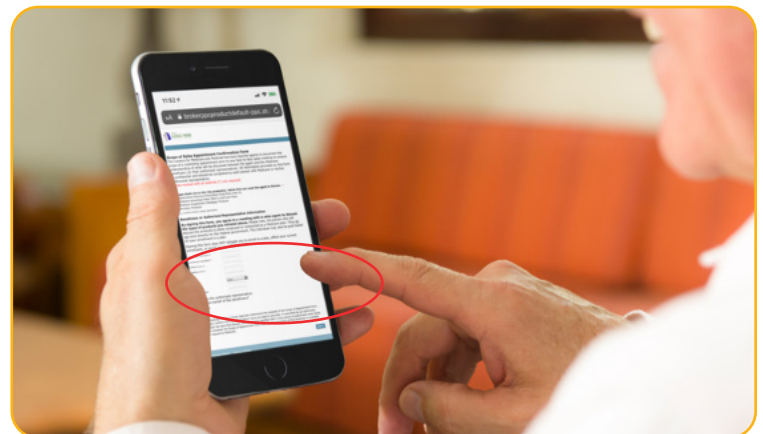
## Easily connect with beneficiaries to complete a SOA



**1. Send email to beneficiaries to complete SOA prior to meeting.**

**2. Each beneficiary will receive an email with a request to complete the SOA on their laptop, phone or tablet.**

The beneficiary will check off the products they want to discuss, such as Medicare Advantage plans and Ancillary Products.



## Then click **SUBMIT**

Beneficiary will receive an acknowledgment that their Scope of Appointment has been sent.

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3. Agent will receive notification of the completed SOA and can log on to view details.

Agent will see those products the beneficiary wants to discuss, along with any updates that might be included for each beneficiary. At this point, the agent also fills out their portion of the SOA form.



PROFILE | **SOA** | HEALTH | SUBSIDY | DRUGS | PHARMACY | COMPARE PLANS

Calculator Add Notes/Task to an active profile

### SCOPE OF APPOINTMENT

A Scope of Appointment is required for all face to face sales appointments. We recommend email as the simplest method. After you complete the sales appointment, you will be able to return to this screen and complete and submit the SOA.

Date Created	Date Submitted	Plan Type	Confirmation Number	Status
04/10/2020	04/10/2020	Stand alone Medicare Prescription Drug Plans Part D Medicare Advantage Plans Part C and Cost Plans Medicare Supplement Medigap Products Ancillary Products	<a href="#">UHQ90151F0Q</a>	Submitted

### UPLOAD FILES

Upload completed Scope of Appointment forms. Click the file name below to view documents. Upload

Upload Date	File Name
Uploaded SOAs	There are no uploaded SOAs for this beneficiary profile.

Select Scope of Appointment Method:

Email  Important

After the agent completes the SOA form, the SOA process is finished. The agent can begin to guide the beneficiary to their best fit Medicare plan.

Stay compliant while working from home with our Electronic Scope of Appointment.

It's that easy!

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