

March 31, 2020

MAPD/PDP Verbal Scope of Appointment Authorizations

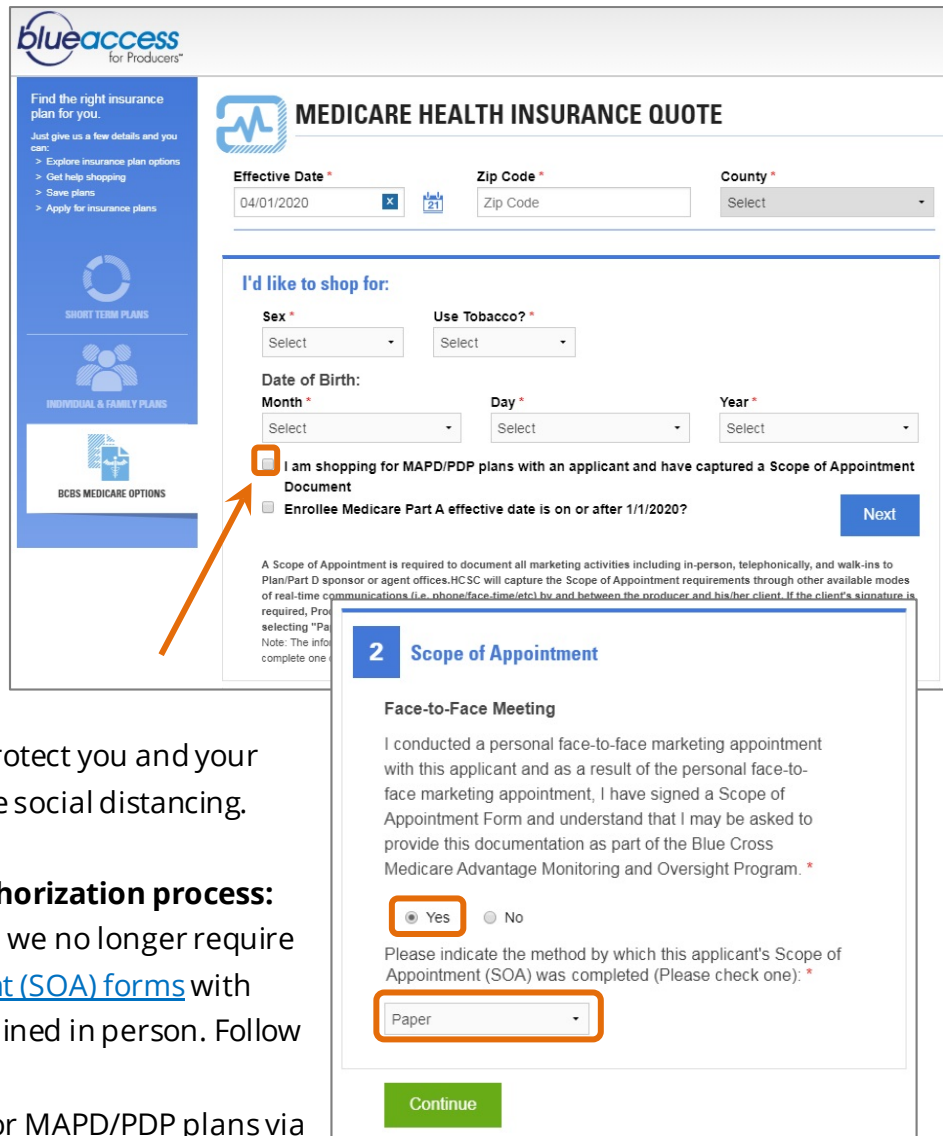
Online enrollment

is safer: You can complete and submit applications online for Medicare Advantage with Prescription Drug (MAPD) and stand-alone Prescription Drug Plan (PDP) coverage via your [Blue Access for ProducersSM](#) account. Online enrollment allows you to submit applications from home, which helps protect you and your clients as you practice social distancing.

New verbal SOA authorization process:

As an additional step, we no longer require [Scope of Appointment \(SOA\) forms](#) with client signatures obtained in person. Follow these new steps:

1. When shopping for MAPD/PDP plans via [Blue Access for Producers](#), make sure you check the box that you have a SOA (top image).
2. Complete the SOA form for your client.
3. Instead of obtaining your client's signature in person, you can get authorization over the phone or over video chat and video conferencing applications.
4. Write "verbal authorization" on the form, sign and date it, and retain it for your records.
5. When you come to the Scope of Appointment screen (shown at right) during the online enrollment process, choose "Yes" and then select "Paper" as the method. Proceed through the application steps as normal.



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for ProducersSM

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MEDICARE HEALTH INSURANCE QUOTE

Effective Date * 04/01/2020
 Zip Code * Zip Code
 County * Select

I'd like to shop for:

Sex * Select
 Use Tobacco? * Select

Date of Birth:
 Month * Select Day * Select Year * Select

I am shopping for MAPD/PDP plans with an applicant and have captured a Scope of Appointment Document
 Enrollee Medicare Part A effective date is on or after 1/1/2020? Next

A Scope of Appointment is required to document all marketing activities including in-person, telephonically, and walk-ins to Plan/Part D sponsor or agent offices. HC SC will capture the Scope of Appointment requirements through other available modes of real-time communications (i.e. phone/face-time/etc) by and between the producer and his/her client. If the client's signature is required, Pro selecting "Pa Note: The info complete one

2 Scope of Appointment

Face-to-Face Meeting

I conducted a personal face-to-face marketing appointment with this applicant and as a result of the personal face-to-face marketing appointment, I have signed a Scope of Appointment Form and understand that I may be asked to provide this documentation as part of the Blue Cross Medicare Advantage Monitoring and Oversight Program. *

Yes No

Please indicate the method by which this applicant's Scope of Appointment (SOA) was completed (Please check one): *

Paper

Continue