

Scope of Appointment Form

St. Luke's Health Plan Medicare Advantage

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

Please indicate the type of product(s) you want the Broker/Agent to discuss:☐ Medicare Advantage Plans HMO (Part C)**Beneficiary Information**

Beneficiary First Name:

Beneficiary Last Name:

Person Completing this Form

Your Name:

Your relationship to the beneficiary:

☐ Self☐ Authorized Representative☐ Other (please specify):

Signature:

This Section to be Completed by Broker

Broker/Agent Name:

Broker ID:

Broker Email:

Date enrollment form taken by Broker/Agent:

Enrollment performed via:

☐ Telephone/Teleconference☐ In-person

Beneficiary Address:

Street:

City:

State:

Zip:

Date appointment completed:

Plans discussed at this meeting:

Disclaimer

By signing this form, you agree to a meeting with a sales agent or broker to discuss the product(s) you selected on page 1. Please note, the person who will discuss the products is either employed or contracted by a Medicare plan. The person does 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 enrollment, or enroll you in a Medicare plan.

MEDICARE ADVANTAGE PLANS (PART C)

Medicare Health Maintenance Organization (HMO) Plan: A Medicare Advantage plan that provides all Original Medicare Part A and Part B health coverage and sometimes covers Part D prescription drug coverage. In most HMOs, you can only get your care from doctors or hospitals in the plan's network (except in emergencies).

Medicare Preferred Provider Organization (PPO) Plan: A Medicare Advantage plan that provides all Original Medicare Part A and Part B health coverage and sometimes covers Part D prescription drug coverage. PPOs have network doctors and hospitals, but you can also use out-of-network providers, usually at a higher cost.

Medicare Special Needs Plan (SNP): A special type of Medicare Advantage Plan available 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. There are plans available to anyone who has both Medical Assistance from the State and Medicare, plans for people with diabetes, and plans for anyone with Medicare living in an assisted living facility (ALF) or living at home but has complex health issues which require comprehensive care.

Scope of Appointment documentation is subject to CMS record retention requirements and must be saved for at least 10 years and provided to St. Luke's Health Plan upon request. Agents must ensure correct Scope of Appointment form is selected for beneficiary's plan enrollment change.