



Insurance focused on you.

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.

_____ **Valor Health Plan HMO SNP Medicare Advantage 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 48 hours prior to appointment: _____

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

Medicare Advantage Plans (Part C) and Cost Plans

Medicare Special Needs Plan (SNP) - A Medicare Advantage Plan that has a benefit package designed for people with special health care needs, including those who live in an institutional setting.

Valor Health Plan HMO SNP is a Health Plan with a Medicare contract. Enrollment in Valor Health Plan HMO SNP depends on contract renewal.