

Geisinger Gold Authorized Agent

Scope of Appointment Guidelines




GEISINGER
GOLD®
—
AUTHORIZED AGENT

SCOPE OF APPOINTMENT BASICS

When is a Scope of Appointment required?

A scope of appointment form should be completed by the prospect and returned prior to the appointment. If it is not applicable for the SOA form to be executed prior to the appointment, an agent may have the prospect sign the form at the beginning of the appointment and note the reason.

SOA forms should be obtained for all face-to-face sales appointments or individual appointments with an existing member/client in an office, coffee shop or other similar location.

The Scope of Appointment is required under the following circumstances:

SOA Scenarios	Example
Walk-In	A Medicare-eligible beneficiary walks into an agent's office to request a presentation of Medicare Advantage plans.
Regular Appointment	The beneficiary has contacted you.
At a Sales Seminar	At a sales seminar, one or more of the attendees may request a private appointment to take place immediately after, to further discuss their Medicare Advantage options.
Existing Book of Business (for other types of Insurance, e.g. life, annuities, etc.)	If you represent a client for other lines of business, such as life insurance or annuities, and you contact them to meet and review those types of coverage, and while there, they ask you about Medicare Advantage Plans.

How do I submit a Scope of Appointment with Geisinger Gold?

Signed SOA forms must be submitted with each application. Applications must be submitted within 24 hours after you are in receipt of the application. If a SOA form is not submitted with an application please explain why (e.g. phone enrollment, group meeting, mail, etc.) using the fax cover sheet (found in the Geisinger Gold form library on the broker portal).

How long should I retain a copy of the SOA form?

Agents should retain and store a copy of the SOA form for a minimum of 10 years from the date of the appointment, even if the appointment was cancelled or rescheduled.

Action

Complete a SOA form and document this beneficiary as a "walk-in" in the "Initial Method of Contact" field on the form.

Have them complete a paper SOA form 48 hours before the predetermined appointment date.

Complete a SOA form and document this beneficiary as a "sales seminar" in the "Initial Method of Contact" field on the form.

Complete a SOA form and set an appointment at least 48 hours in the future to meet and discuss Medicare Advantage plans.

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SOA Scenarios	Example
Rescheduled Appointment	The beneficiary contacts you to reschedule an appointment for which you have already received a Scope of Appointment
Unplanned Guest(s)	You arrive at an appointment with a completed SOA form from your prospect. Your prospect, unbeknownst to you, had invited another Medicare-eligible individual to join in the presentation.
Prospect requests to discuss other products	You have a SOA form on file, and waited the appropriate 48 hours. You've arrived at the appointment and the prospect wishes to discuss other Medicare related products previously not predetermined in the original scope.
Follow-up Appointment (finishing an appointment) (Conducting a second presentation)	<p>You have already collected the SOA and presented the plan to your client. Then the prospect requests that her son review the sales materials. The following week, after her son has looked at the materials, she calls back and is now ready to complete the enrollment.</p> <p>You have already collected the SOA and presented the plan to your client. Then the prospect requests that her son review the sales materials. The following week, the prospect calls and requests that you return while her daughter is there, and that you do another sales presentation.</p>

Action

Complete a new SOA form. Whenever an appointment date is changed a new SOA form must be completed.

You must explain the terms of the existing SOA and let the unexpected guest(s) know that you cannot go beyond that scope to discuss any other products.

Then complete a new paper SOA form and document each "guest" of the original prospect in the "Initial Method of Contact" field on the form.

A new SOA form is required if the beneficiary has requested to discuss another product type during the appointment. However, a new appointment is not required.

Complete a new SOA form before the discussion of new Medicare related products begins.

A new SOA would NOT be needed since you are only returning to complete the enrollment process and you are not presenting the products again.

Complete a SOA form and set an appointment at least 48 hours in the future to meet and discuss Medicare Advantage plans.



This guide is not intended for distribution to Medicare beneficiaries. Medicare has neither reviewed nor endorsed this information. Producers must be licensed in the applicable state, appointed by Geisinger Health Plan and certified to sell in their applicable state prior to engaging in any sales or sales/marketing activities related to Geisinger Gold products.