

# SCOPE OF APPOINTMENT SCENARIOS

## Your Quick-Ref guide

### What's the preferred method to capture ALL Scope of Appointments (SOA's)?

Use the TeleScope Line—it's foolproof! Avoid using a paper SOA unless TeleScope is unavailable or not feasible. A paper SOA has to be filled out completely and correctly, giving you more chances to make a mistake! Whatever you do, **don't make a presentation without a completed SOA.**

**The scenarios that follow don't include every situation. When in doubt, get an SOA. It can't hurt!**



**Use the TeleScope Line.**  
**1-866-398-6055**

### SOA SCENARIOS

	EXAMPLE	ACTION
<b>Regular Appointment/ Phone Presentation (non-Call Center)</b>	The beneficiary called you or you received a lead from a BRC or other source, giving you permission to contact the customer.	Call the Cigna-HealthSpring TeleScope Line* to complete a recorded Scope of Appointment (SOA).
<b>Rescheduled Appointment</b>	A beneficiary contacts you to reschedule an appointment for which you have already received an SOA.	If the products you'll discuss haven't changed, your initial SOA is still valid.

**Together, all the way.<sup>SM</sup>**



## SOA SCENARIOS

### Follow-Up Appointment

› Finishing a presentation

#### EXAMPLE

You have already collected the SOA and presented the plan to the prospect. But then, the prospect requests that his son review the materials. Several days later, the prospect calls back and is now ready to enroll.

#### ACTION

A new SOA would not be needed since you are only returning to finish the enrollment application process — NOT conducting another presentation.

› Conducting a second presentation

You have already collected the SOA and presented the plan to the prospect. But then, the prospect requests that his daughter review the materials. Several days later, he calls and requests that you return so his daughter can hear the presentation before he enrolls.

If the products you'll discuss haven't changed, your initial SOA is still valid. But if the benefits, plan, or plan type are now different, call our TeleScope Line\* to complete a NEW recorded SOA.

### Medicare Review

You conduct an outbound call for other products, or a prospect schedules an appointment for a Medicare Review of all senior products. You go on the appointment and after the presentation, they decide they want to further discuss Cigna-HealthSpring.

Call our TeleScope Line\* to complete a recorded SOA. But you must wait a minimum of 48 hours before presenting.

### Existing Book of Business

Say you represent the beneficiary for other types of insurance (life, annuities, etc.), and you contact them to meet and review their coverages. While you're there, they initiate a discussion about Medicare Advantage or Part D.

Call our TeleScope Line\* to complete a recorded SOA. But you must wait a minimum of 48 hours before presenting Cigna-HealthSpring products.

### Unforeseen Request for Other Products

You've gotten an SOA and waited 48 hours. You arrive at the appointment to discuss MA, MAPD, or PDP. Now the beneficiary wants to discuss another insurance product, like life insurance or Medicare supplements.

Explain the SOA process and that you can only speak about the product previously agreed upon. Offer to return at a later, separate appointment to discuss other types of products.

You arrive at the appointment to discuss MAPD, and now the beneficiary wants to discuss PDP.

You may discuss PDP since it is a Medicare-related product. But since they had not previously selected or agreed to discuss PDP on your SOA, a **NEW** SOA should be completed and signed before the discussion starts.

\* If TeleScope is unavailable or not feasible, have the beneficiary complete and sign a paper SOA and send it back to you.

# What about Unforeseen Situations?

SOA SCENARIOS	EXAMPLE	ACTION
<b>Unplanned Guest</b>	You arrive at an appointment with a completed SOA for your prospect. Unbeknownst to you, they had invited other Medicare-eligible individuals to join in the presentation.	You must explain the terms of the existing SOA and let the guests know that you can't go beyond that scope to discuss other products.
		Then call our TeleScope Line* to complete a recorded SOA for each unplanned guest. If you must use a paper SOA, document each as a "Guest" of the original beneficiary in the "Initial Method of Contact" field on the form.
<b>At a Sales Seminar</b>	At a Sales Seminar, one or more of the attendees request a private appointment to take place immediately after, so they can further discuss their Medicare Advantage options.	Call our TeleScope Line* to complete a recorded SOA. If you must use a paper SOA, document this as "Sales Seminar" in the "Initial Method of Contact" field on the form.
<b>Walk-In</b>	A Medicare-eligible beneficiary walks into an agent's office to request a Medicare Advantage presentation.	Call our TeleScope Line* to complete a recorded SOA. If you must use a paper SOA, document this beneficiary as a "Walk In" in the "Initial Method of Contact" field on the form.
<b>Exceptional Case</b>	The prospect's appointment is at the end of the month and they need a presentation to make the deadline.	Call our TeleScope Line* to complete a recorded SOA. If you must use a paper SOA, document the exceptional situation in the "Initial Method of Contact" section of the form.  <b>PLEASE NOTE:</b> You may be audited if you show a pattern of using exceptional cases, as this could be seen as an attempt to intentionally avoid the SOA rules enacted by CMS.
	Prospect's children need to be involved, but they are limited in availability and need to see the presentation now.	
	Prospect is leaving the area for an extended period of time and needs to see the presentation immediately.	

\* If TeleScope is unavailable or not feasible, have the beneficiary complete and sign a paper SOA and send it back to you.