

SCOPE OF APPOINTMENT BASICS

When do you need a Scope of Appointment (SOA)?

- Prior to any personal/individual marketing appointment when MA, MAPD or PDP plans are to be presented, including:
 - Scheduled or Walk-in, one on one or in-person appointments regardless of location
 - Scheduled telephonic/virtual presentations
- A Scope of Appointment must be collected for each beneficiary being presented, for example, if presenting to a couple living in the same residence, a SOA must be collected for both.
- A Scope of Appointment must be collected prior to future appointments set after an educational event, formal or informal sales event.
- A Scope of Appointment is not required when conducting educational events, since marketing and plan presentations are not allowed at these event types.

EFFECTIVE SEPTEMBER 30, 2023

CMS requires 48 hours between the execution of a SOA and an agent conducting a marketing appointment with a beneficiary.

48 Hour Exceptions:

- 4 days prior to the end of an election period (AEP, IEP, OEP, and SEP) or beneficiary-initiated walk-in.
 - Walk-in includes agent's office, a kiosk, a plan's office or any other walk-in.
- Inbound telephone calls

HOW LONG IS A SOA VALID?

Effective September 30, 2023, a signed SOA is valid for 12 months.