

# Government Required Scope Of Appointment Form

CMS, the Center for Medicare and Medicaid Services, requires that insurance agents providing Medicare Part D Prescription and Medicare Advantage Plans to people on Medicare, first receive from the Medicare beneficiary the attached form.

I can also do a CMS approved teleconference call with you to comply with the government requirement. The call takes only a few minutes for us to complete.

After I receive the form from you either by fax, mail or email, or we complete the phone call, then I can provide you with detailed Medicare Part D prescription, Medicare Advantage Plan information and Medicare Supplement information. Agents that do not complete the process cannot provide you complete information about your choices.

A Medicare beneficiary now has more choices available than in the past.

## **Basically, your choices are these:**

1. Original Medicare Only - this is having Medicare Parts A and B
2. Original Medicare with a Medicare Supplement or Medigap (Medicare Supplement and Medigap are two phrases/words for the same thing)
3. Original Medicare with a Part D Prescription Drug Plan
4. Original Medicare with both Medicare Supplement and Part D Prescription Drug Plan
5. Enrolling in a Medicare Advantage Plan

I would like to provide you with all 5 options. In order to provide that information to you, please fax, mail or email the attached Scope of Appointment form to:

**John K Arnold Insurance**  
**5415 Lake Howell Rd #325**  
**Winter Park, FL 32792**  
**Ph: 407-592-0311**  
**Fax: 407-386-7053**  
**Florida and Medicare Websites**  
**[www.floridahealthinsurance.com](http://www.floridahealthinsurance.com)**  
**[www.my-medicare-plan.com](http://www.my-medicare-plan.com)**  
**Email: [john@my-medicare-plan.com](mailto:john@my-medicare-plan.com)**

**Returning this form does not enroll you in any plan nor is there any obligation on your part.**

## Scope of Sales Appointment Confirmation Form

### To be completed by person with Medicare.

Please initial below in the box beside the plan type that you want the agent to discuss with you. If you do not want the agent to discuss a plan type with you, please leave the box empty. (Please note that an agent may also discuss a Medicare Supplement policy with you.)

<input type="checkbox"/>	<b>Stand-alone Medicare Prescription Drug Plans (Part D)</b>
	<b>Medicare Prescription Drug Plan (PDP)</b> — A stand-alone drug plan that adds prescription drug coverage to the Original Medicare Plan, some Medicare Cost Plans, some Medicare Private-Fee-for-Service Plans, and Medicare Medical Savings Account Plans.
<input type="checkbox"/>	<b>Medicare Advantage (Part C), Medicare Advantage Prescription Drug Plans, and other Medicare Plans</b>
	<b>Medicare Health Maintenance Organization (HMO)</b> — A Medicare Advantage Plan that must cover all Part A and Part B health care. In most HMOs, you can only go to doctors, specialists, or hospitals in the plan's network except in an emergency.
	<b>Medicare Preferred Provider Organization (PPO) Plan</b> — A type of Medicare Advantage Plan available in a local or regional area in which you pay less if you use doctors, hospitals, and providers that belong to the network. You can use doctors, hospitals, and providers outside of the network for an additional cost.
	<b>Medicare Private Fee-For-Service (PFFS) Plan</b> — A type of Medicare Advantage Plan in which you may go to any Medicare-approved doctor or hospital that accepts the plan's payment and terms and conditions.
	<b>Medicare Special Needs Plan (SNP)</b> — A special type of Medicare Advantage Plan 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.
	<b>Medicare Medical Savings Account (MSA) Plan</b> — MSA Plans combine a high deductible Medicare Advantage Plan and a bank account. The plan deposits money from Medicare in the account. You can use it to pay your medical expenses until your deductible is met.
	<b>Medicare Cost Plan</b> — A type of health plan. In a Medicare Cost Plan, if you get services outside of the plan's network without a referral, your Medicare-covered services will be paid for under the Original Medicare Plan (your Cost Plan pays for emergency services, or urgently needed services).

By signing this you are agreeing to a sales meeting with a sales agent to discuss the specific types of products you initialed above. The person that will be discussing plan options with you is either employed or contracted by a Medicare health plan or prescription drug plan that is not the Federal government, and they may be compensated based on your enrollment in a plan.

Signing this does NOT affect your current enrollment, nor will it enroll you in a Medicare Advantage Plan, Prescription Drug Plan, or other Medicare plan.

**Beneficiary Signature:** \_\_\_\_\_

*If you are the authorized representative, you must sign above and provide the following information:*

*Name:* \_\_\_\_\_

*Address:* \_\_\_\_\_

*Phone number:* \_\_\_\_\_

*Relationship to Beneficiary:* \_\_\_\_\_

To be completed by Agent:

Agent Name: <i>JOHN K. Arnold</i>	Agent Phone: <i>407-592-0311</i>
Beneficiary Name:	Beneficiary Phone:
Beneficiary Address:	
Initial Method of Contact: (Indicate here if beneficiary was a walk-in.)	
Agent's Signature:	

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