

March 31, 2020

# MAPD/PDP Verbal Scope of Appointment Authorizations

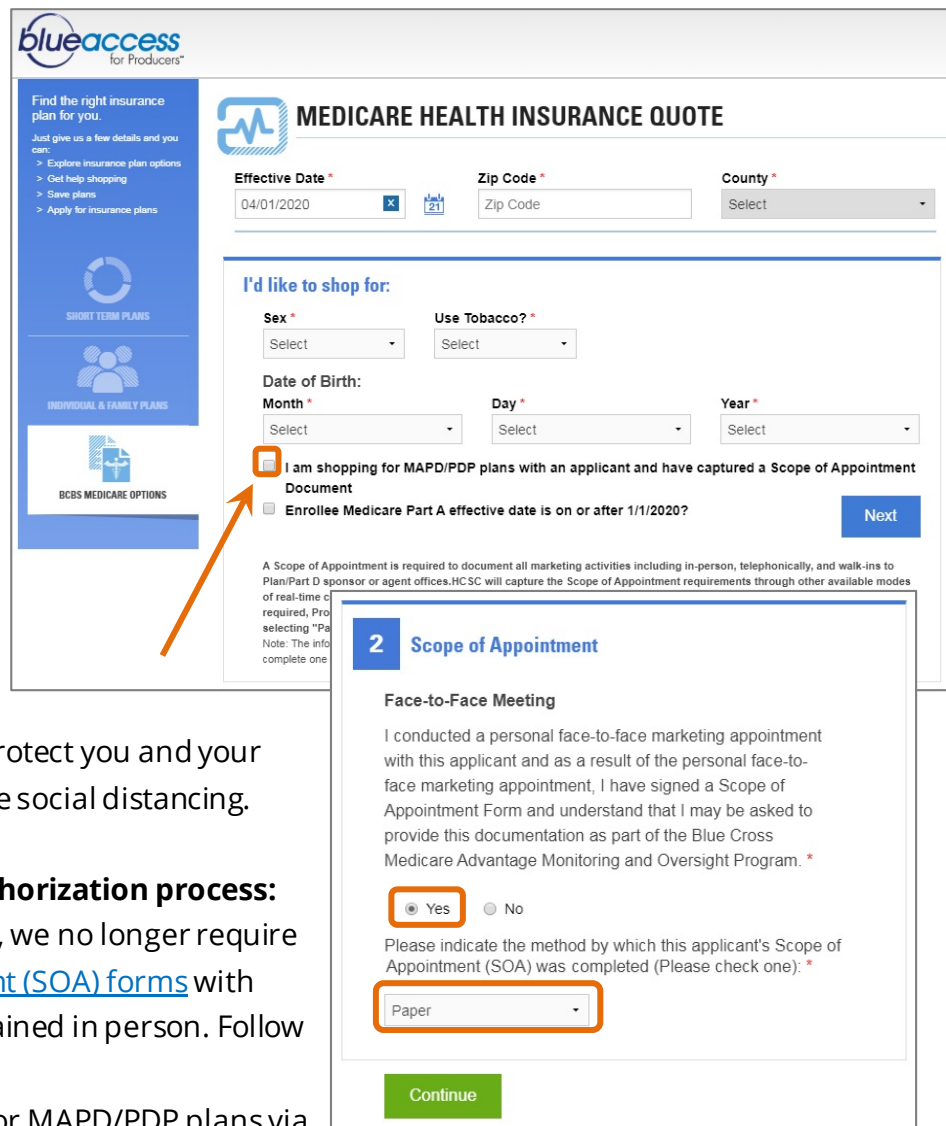
## Online enrollment

**is safer:** You can complete and submit applications online for Medicare Advantage with Prescription Drug (MAPD) and stand-alone Prescription Drug Plan (PDP) coverage via your [Blue Access for Producers<sup>SM</sup>](#) account. Online enrollment allows you to submit applications from home, which helps protect you and your clients as you practice social distancing.

## New verbal SOA authorization process:

As an additional step, we no longer require [Scope of Appointment \(SOA\) forms](#) with client signatures obtained in person. Follow these new steps:

1. When shopping for MAPD/PDP plans via [Blue Access for Producers](#), make sure you check the box that you have a SOA (top image).
2. Complete the SOA form for your client.
3. Instead of obtaining your client's signature in person, you can get authorization over the phone or over video chat and video conferencing applications.
4. Write "verbal authorization" on the form, sign and date it, and retain it for your records.
5. When you come to the Scope of Appointment screen (shown at right) during the online enrollment process, choose "Yes" and then select "Paper" as the method. Proceed through the application steps as normal.



**blueaccess**  
for Producers<sup>SM</sup>

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SHORT TERM PLANS  
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### MEDICARE HEALTH INSURANCE QUOTE

Effective Date \* 04/01/2020  
Zip Code \* Zip Code  
County \* Select

I'd like to shop for:

Sex \* Select  
Use Tobacco? \* Select

Date of Birth:  
Month \* Select Day \* Select Year \* Select

I am shopping for MAPD/PDP plans with an applicant and have captured a Scope of Appointment Document  
 Enrollee Medicare Part A effective date is on or after 1/1/2020

Next

A Scope of Appointment is required to document all marketing activities including in-person, telephonically, and walk-ins to Plan/Part D sponsor or agent offices. HCSC will capture the Scope of Appointment requirements through other available modes of real-time capture if required. Producers must select "Paper" as the method of completion.  
Note: The information must be complete one day before the effective date.

## 2 Scope of Appointment

### Face-to-Face Meeting

I conducted a personal face-to-face marketing appointment with this applicant and as a result of the personal face-to-face marketing appointment, I have signed a Scope of Appointment Form and understand that I may be asked to provide this documentation as part of the Blue Cross Medicare Advantage Monitoring and Oversight Program. \*

Yes  No

Please indicate the method by which this applicant's Scope of Appointment (SOA) was completed (Please check one): \*

Paper

Continue