

ELECTRONIC SCOPE OF APPOINTMENT



An Electronic Scope of Appointment (SOA) allows brokers to collect the Centers for Medicaid and Medicare Services (CMS) required SOA prior to a Medicare product consultation. Brokers have the ability to collect the SOA using a DocuSign form, which allows the Medicare beneficiary to submit a completed SOA electronically to the broker. The completed SOA can be downloaded and kept on file according to the CMS SOA requirements.

Using Electronic Scope of Appointment

STEP 1

On the electronic SOA homepage, enter the Medicare beneficiary's name and email address, along with the name and email address of the broker requesting the SOA.

PowerForm Signer Information

Fill in the name and email for each signing role listed below. Signers will receive an email inviting them to sign this document.

Please enter your name and email to begin the signing process.

Your Role:
Medicare Beneficiary

Your Name:

Your Email:

Please provide information for any other signers needed for this document.

Your Role:
Broker

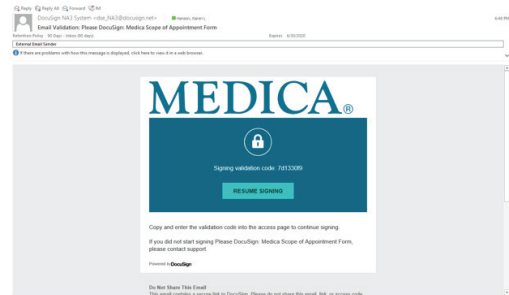
Your Name:

Your Email:

[Begin Signing](#)

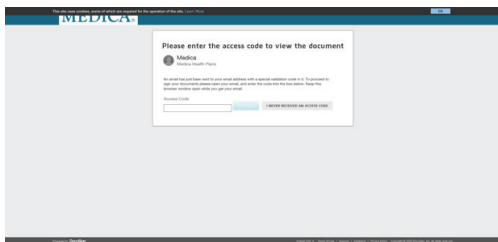
STEP 2

Once the SOA is emailed, the Medicare beneficiary will receive an email from DocuSign with additional instructions.



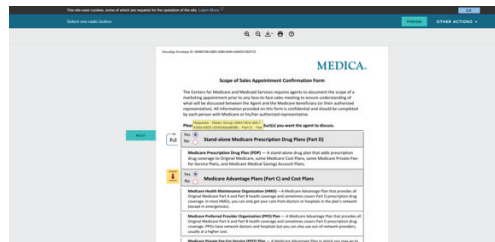
STEP 3

The Medicare beneficiary will need to select *Resume Signing* and enter the verification code to gain access to the SOA document.



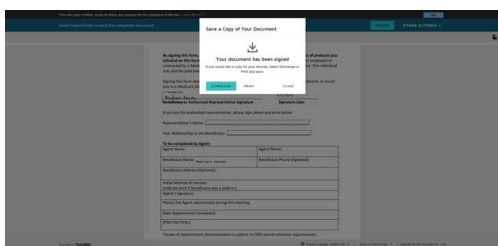
STEP 4

Once the Medicare beneficiary accesses the SOA, they should select *Yes* to the Medicare products they'll be discussing with their broker and initial next to their selection(s).



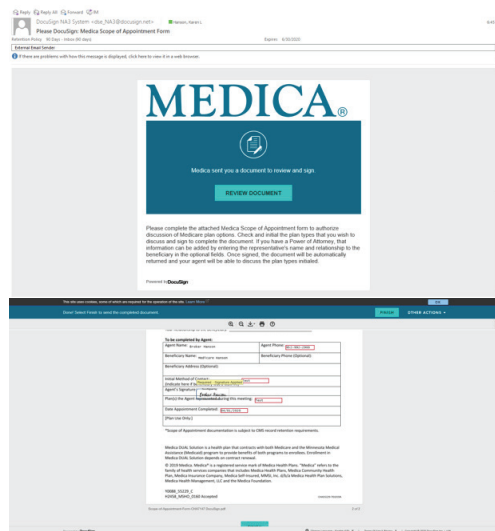
STEP 5

Once the Medicare beneficiary has completed the SOA, they can download or print a copy of the SOA and will also receive a copy via email.



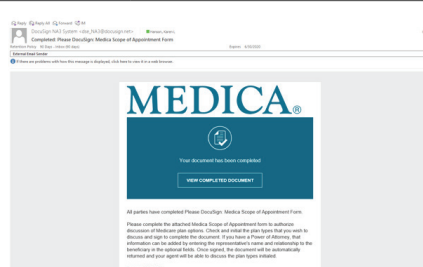
STEP 6

When the Medicare beneficiary completes the SOA, the broker will receive an email confirmation to access the SOA and complete the document by filling in their information and required signature.



STEP 7

Once the review and completion of the SOA is finalized, the broker will receive an email with the final SOA to download and store.



Have a question?

Contact your Sales Relationship Manager (SRM) or Broker Services at **1-866-752-0945** or **BrokerServices@medica.com**.

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