

March 31, 2020

MAPD/PDP Verbal Scope of Appointment Authorizations

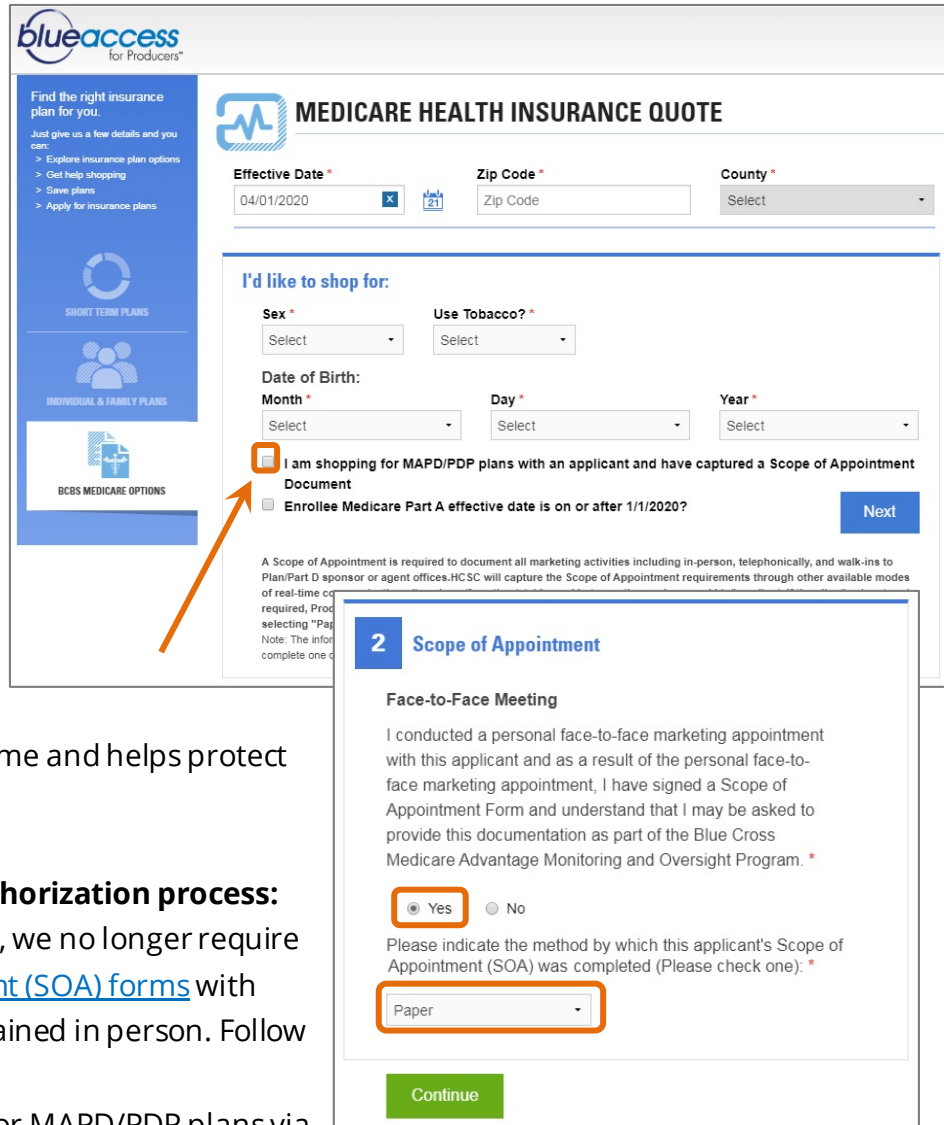
Online enrollment

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 ProducersSM](#) account. Online enrollment allows you to submit applications from home and helps protect you and your clients.

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.



The image shows two screenshots from the Blue Access for Producers website. The top screenshot is the 'MEDICARE HEALTH INSURANCE QUOTE' form. It includes fields for 'Effective Date' (04/01/2020), 'Zip Code', and 'County'. Below these are sections for 'I'd like to shop for:' with dropdowns for 'Sex' and 'Use Tobacco?'. There is also a 'Date of Birth' section with dropdowns for 'Month', 'Day', and 'Year'. A checkbox is highlighted with an orange box and an arrow, containing the text: 'I am shopping for MAPD/PDP plans with an applicant and have captured a Scope of Appointment Document'. Below this is another checkbox: 'Enrollee Medicare Part A effective date is on or after 1/1/2020?'. A 'Next' button is at the bottom right. The bottom screenshot is the '2 Scope of Appointment' form. It has a section titled 'Face-to-Face Meeting' with a text area for a statement. Below this are radio buttons for 'Yes' (selected) and 'No'. Another text area asks to 'Please indicate the method by which this applicant's Scope of Appointment (SOA) was completed (Please check one):'. A dropdown menu is highlighted with an orange box, showing 'Paper' selected. A 'Continue' button is at the bottom.