



## Scope of Sales Appointment Form

The Centers for Medicare & Medicaid Services (CMS) requires agents to document the scope of appointment prior to any one-on-one sales meeting to ensure understanding of what will be discussed between the agent and the Medicare beneficiary (or his/her authorized representative). All information provided on this form is confidential and should be completed by each person with Medicare in attendance (or his/her authorized representative).

**Please check the box(es) for the BCBST available product(s) to be presented.**

- |   |  |
|---|--|
| <input type="checkbox"/> Medicare Advantage (MA-PD) | <input type="checkbox"/> BlueEssential HMO SNP           |
| <input type="checkbox"/> BlueCare Plus (D-SNP)      | <input type="checkbox"/> BlueCare Plus Choice (FIDE-SNP) |

<b>Sections below are required and <u>MUST</u> be completed by the Agent:</b>	
Appointment Date:	Beneficiary Name:
Agent Name and Agent ID:	Beneficiary Phone:
Agent's Phone:	Beneficiary Complete Address:
Agent's Signature:	
Initial Method of Contact:	

Signing this form does not obligate you to enroll, affect your current enrollment or future Medicare enrollment will not be impacted, and automatic enrollment will not occur. Your signature also does not obligate you to meet with the agent. You may notify the agent if you need to reschedule or cancel this appointment. The person that will be discussing plan options with you is either employed by or contracted with a Medicare health plan or Prescription Drug plan. **By selecting a plan you are confirming this form has been completed prior to the discussion of these benefits.**

**Beneficiary or Authorized Representative:**

Name: \_\_\_\_\_ Relationship: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

*BlueCross BlueShield of Tennessee, Inc. and BlueCare Plus Tennessee are Independent Licensees of the BlueCross BlueShield Association*

*BlueAdvantage is a PPO plan and BlueEssential is an HMO SNP plan with a Medicare contracts. BlueCare Plus is an HMO SNP plan with a Medicare contract and a contract with the Tennessee Medicaid program.*

*Enrollment in BlueAdvantage or BlueCare Plus Tennessee depends on contract renewal.*