

## Medicare Scope of Appointment (SOA) Confirmation Call Script

- A. Script** 1. “Thank you for your interest in the MetroPlus Health Plan. This call is to confirm that you would like to schedule an <<**in person / telephonic**>> appointment with a Medicare Licensed Representative to learn more about this plan.”
2. “The Centers for Medicare and Medicaid Services (CMS) requires Medicare Licensed Representatives to document the scope of a marketing appointment prior to any face-to-face or telephonic sales meeting to ensure understanding of what will be discussed between the Representative and the Medicare beneficiary or their authorized representative. This call serves as the documentation to allow a Licensed Representative to <<**meet with you on <<insert appointment date>> / speak with you over the phone today**>>.”
3. “There are three types of MetroPlus products the Medicare Licensed Representative can discuss with you:
- a. MetroPlus Platinum Plan (HMO)** – 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. MetroPlus Advantage Plan (HMO D-SNP)** – 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.
  - c. MetroPlus UltraCare (HMO D-SNP)**: A Medicare Advantage Plan that has a benefit package designed for people with special health care needs. A MAP plan is a type of integrated Dual-Eligible Special Needs Plan (D-SNP) combined with a type of Medicaid Managed Long-Term Care (MLTC) plan designed for people who have both Medicare and full Medicaid and who need a certain amount of health and community based long-term care services like home care and personal
4. From our discussion it seems that you may qualify for (insert plan name) The presentation you receive today will have the details of that plan.
5. “Please know that you are agreeing to a sales meeting with a Medicare Licensed Representative to discuss the specific type of product a Medicare beneficiary may be eligible to enroll into. Please note that the person who will discuss the product is either employed or contracted by a Medicare plan who does not work directly for the Federal government. The individual may also be compensated based on your enrollment in a plan.”
6. “Accepting this meeting does not obligate you to enroll in a plan, affect your current enrollment nor enroll you in a Medicare Advantage Plan, Prescription Drug Plan, or other Medicare plan.”
7. “Do you have any questions?”

