



IMPERIAL INSURANCE COMPANIES

Scope of Appointment Confirmation (SOA)

First Name _____ Last Name _____ MI _____

Phone # _____ Mobile # _____ MBI Number _____

The Centers for Medicare and Medicaid Services requires agents to document the scope of a marketing appointment (SOA) prior to any face-to-face or telephonic sales meeting to ensure understanding of what will be discussed with the Agent and the beneficiary (or their authorized representative). Imperial Insurance Companies (HMO) (HMO SNP) requires agents to submit a complete signed SOA copy the enrollment application.

Please circle the product you want the agent to discuss with you during your appointment (circle one):

Imperial Insurance Company Traditional (HMO)-003 Imperial Insurance Value (HMO C-SNP)-005 Imperial Insurance Traditional Plus (HMO)-007	Imperial Insurance Company Dual Plan (HMO D-SNP)-004
TX: Bexar, Collin, Comal, Dallas, Denton, El Paso, Fort Bend, Harris, Hays, Montgomery, Nueces, Tarrant, Travis, Williamson, Wise	TX: Bexar, Collin, Comal, Dallas, Denton, El Paso, Fort Bend, Harris, Hays, Montgomery, Nueces, Tarrant, Travis, Williamson, Wise
NV: Clark	
AZ: Coconino, Maricopa, Pima, Pinal and Yavapai	

Medicare Health Maintenance Organization (HMO) is a Medicare Advantage Plan that provides all Original Medicare Part A and Part B health coverage and sometimes covers Part D prescription drug coverage. In most HMO's, you can get your care from doctors or hospitals in the plan's network except in emergency situations.

Beneficiary or Authorized Representative Name, Signature and Signature Date:

Name _____ Signature _____ Date _____

Beneficiaries are not obligated to enroll in the plan. Current or future Medicare enrollment status will not be impacted, and you will not automatically be enrolled in the plan(s) discussed.

To be completed by Agent:

Date of Application _____ Agent Name _____ Phone # _____

Initial Method of Contact _____

Agent's Signature _____

Circle the plan(s) the agent represented during this meeting:

Imperial Insurance Company Traditional (HMO)-003	Imperial Insurance Value (HMO C-SNP)- 005	Imperial Insurance Traditional Plus (HMO)- 007	Imperial Insurance Company Dual (HMO D- SNP)-004
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****Scope of Appointment document is subject to CMS record retention requirements****