

Compliant Sales Presentations - Remote Selling Tools



50.3 – Personal/Individual Marketing Appointments

42 CFR §§ 422.2268(b)(3-5),(11), 423.2268(b)(3-5) and (11)

SOA parameters (and documentation) are required for all one-on-one appointments, regardless of venue (e.g., home, telephone). During these appointments, discussions may only concern previously agreed upon plan products documented in the SOA, and may only market health-related products, and not, for example, annuities or life insurance. Individuals may not solicit/accept enrollment applications for a January 1 effective date until October 15 of the preceding calendar year, unless the beneficiary is entitled under another enrollment period.

Scope of Appointment



CMS approved Sales Presentation



Summary of Benefits



Current Star Ratings







Use the Presentation Materials

Send the SOA

Send the Quote

Available Resources

Search 

 <p>Presentation Materials</p> <p>View Resources</p>	 <p>Agent Guidelines</p> <p>View Resources</p>	 <p>Other</p> <p>View Resources</p>
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Email a Quote



Email/Text Electronic Scope of Appointment



Ascend - SOA



Send the SOA

Welcome Coleen

What would you like to do today?

Enroll A Client In Person	Year Over Year Plan Change Tool	2019/2020 Aetna Medicare Producer Guide
Email a Quote	Email/Text Electronic Scope of Appointment	Prescription Lookup
Benefits Checkup	Find A 2019 DRx Enrollment	Find A 2019 Enrollment
Find A 2020 Enrollment	Find A 2020 SilverScript Enrollment	Find A Client



Scope of Appointment

Which kind of Scope of Appointment do you want to create?


Electronic Form

Send the SOA

[EXTERNAL] Scope Of Appointment Acceptance Email

 Scope Of Appointment Acceptance Email <agent@ten>
To  Coyne, Coleen M Mon 3/16/2020 7:37 AM

[Reply](#) [Reply All](#) [Forward](#) [...](#)

 [Click here to download pictures.](#) To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

[Action Items](#) [+ Get more add-ins](#)

**** External Email - Use Caution ****

[Click here to review your Scope of Appointment.](#) Please approve or reject the Scope of Appointment. It must be approved before you can discuss the specified health plans with the agent named in the form.

Coyne, Cody

Age-in Prospect | Mar 12, 2020 | Self Generated

[Contact Lead](#) [Start a Meeting](#)

Upcoming Appointments

Appointment Type	Start Date	Start Time	Status
Scope of Appointment	Mar 16, 2020	12:00 AM	Accepted >

[Create Scope of Appointment](#)

Ascend - Quote



Send the Quote

Welcome Coleen

What would you like to do today?

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♥ aetna™

Explore plans

Enter your ZIP code below to find plans Aetna offers and review rates.

ZIP code

View plans

Ascend - Quote



Send the Quote

2020 Medicare Plans

View Plans and Compare

Below are the plans that are available in ZIP code **44130** in Cuyahoga County, Ohio:

Send Quote

Send Quote ✕

First Name *	Last Name *
<input type="text" value="First Name"/>	<input type="text" value="Last Name"/>
Email Address *	Phone *
<input type="text" value="Email Address"/>	<input type="text" value="Phone"/>

Application only - select 1 plan Text verification code - select 1+ plans

▼ Medicare Advantage 0 selected

Add a custom message

Send

^ Medicare Advantage 1 selected

Select All [Clear All](#)

- Aetna Medicare Premier (HMO) - H0628
- Aetna Medicare Advantra Silver (PPO) - H1608
- Aetna Medicare Value Plan (HMO) - H3931
- Aetna Medicare Assure (HMO D-SNP) - H5337
- Aetna Medicare Premier 2 (PPO) - H5521
- Aetna Medicare Value Plan (PPO) - H5521
- Aetna Medicare Premier 1 (PPO) - H5521
- Aetna Medicare Premier Plus 1 (Regional PPO) - R6694
- Aetna Medicare Premier Plus 2 (Regional PPO) - R6694

Add a custom message

Email sent. The verification code is 2078709427. The code was sent to the beneficiary's phone.



Send the Quote



Aetna <donotreply@quotes.isf.io>

To Coyne, Coleen M

**** External Email - Use Caution ****

Greetings Cody Coyne,

Thank you for your interest in our healthcare plan(s). Below you will find your quote as well as quick access to additional information about the plan. If you are ready, you may enroll in the plan now.

Agent's Message : Hi Cody, thank you for your interest in Aetna.

Aetna Medicare Premier (HMO)

Monthly Premium \$0.00

Enroll in this Plan

Additional Information

Medicare plans can be complicated. You may have been provided with additional documents detailing how the plan works. These documents can be found below.

1. [Summary of Benefits](#)
2. [Resumen de Beneficios \(Español\)](#)
3. [Formulary](#)
4. [Formulario \(Español\)](#)
5. [Prior Authorization Information](#)
6. [Step Therapy Information](#)
7. [Evidence of Coverage](#)
8. [Evidencia de Cobertura \(Español\)](#)
9. [Low Income Subsidy Information](#)
10. [Subsidio de Bajos Ingresos \(Español\)](#)
11. [Order Information Kit](#)
12. [Solicite un Kit de información \(Español\)](#)
13. [Star Ratings](#)
14. [Clasificación Por Estrellas \(Español\)](#)

Ascend - Quote

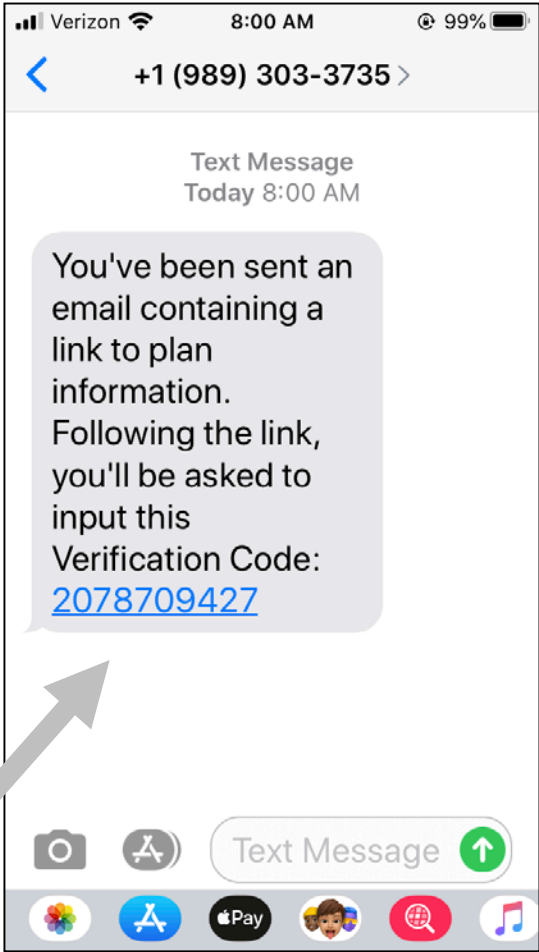


Send the Quote

Verification

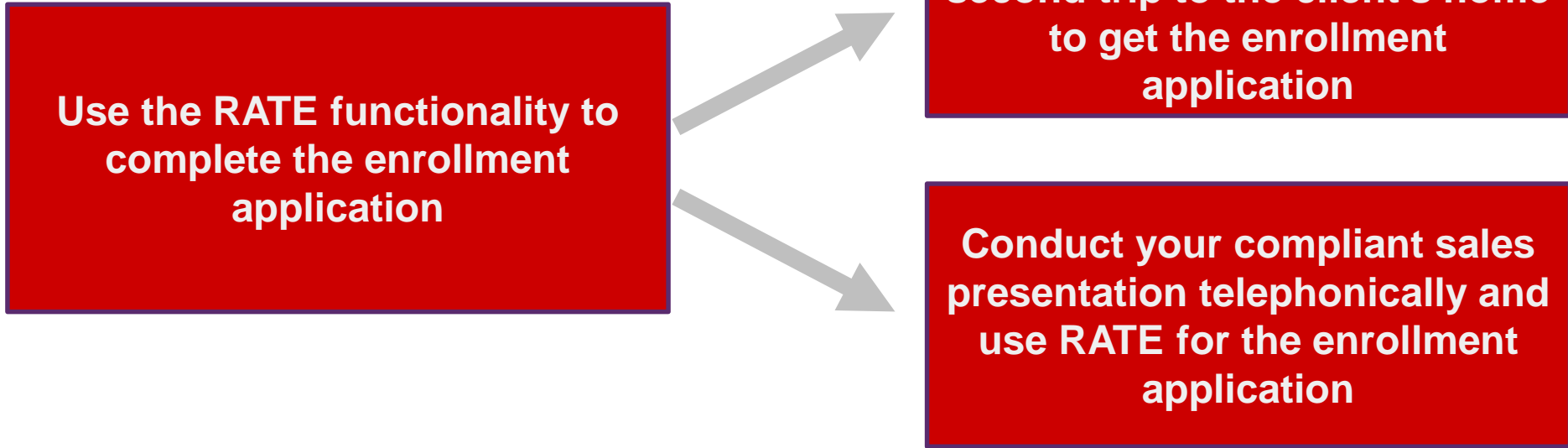
Enter Verification Code

Submit



Your client will enter the verification code they received in text (which will match the code you received when you sent the quote) and the enrollment will reflect you as the agent of record.

Scenarios



All calls into your RATE toll free number are recorded. This recording protects you and will provide documentation that you reviewed all required compliance aspects of the sales presentation and the telephonic enrollment.

Scenarios

Follow up to your original sales appointment – saving you a second trip to the client’s home to get the enrollment application

- You have previously visited with your client and they call you back and are ready to enroll
 - Have your client call you on your RATE phone number
 - Use the enrollment script for RATE while completing the application
- Your client does not have internet access (or is not comfortable using it) for an electronic/eKit enrollment

Conduct your compliant sales presentation telephonically and use RATE for the enrollment application

- You can have your client call you on your RATE line. Conduct the sales presentation and plan information over the phone.
 - Mailed or emailed the scope of appointment which will give you permission to review the plan materials
 - Mailed or send an E-Kit so your client has the required plan details
 - Use the enrollment script for RATE while completing the application

RATE Training

<https://www.brainshark.com/aetnams/vu?pi=zH3zPw8N7zb9idz0>



Questions? We're here to help

If you have any questions, just [contact your local Aetna Medicare broker manager](#). Or you can contact the Aetna Medicare Broker Services Department at 1-866-714-9301 or brokersupport@aetna.com. Normal business hours are 8 AM to 8 PM, Monday - Friday.

 Thank you!

If you are unable to see the message below, [click here to view](#).



Keeping you informed about COVID-19

As we continue monitoring the outbreak of the coronavirus, also known as COVID-19, we remain focused on the health and safety of our members and agents. As an agent, you play an important role in keeping members informed. [We encourage you to check our website](#) frequently for updated information about the virus and tips for staying healthy, and to learn about the ways we're supporting members.

[We encourage you to check our website](#)

Thank you for your time today and for your dedication to your clients and our members!