

AEP 2021

Text to Sign a Scope of Appointment



Engage seniors by offering the flexibility of completing a SOA on their phone

Available for agents to:

Stay Compliant

The electronic Scope of Appointment is a CMS requirement that protects seniors by ensuring agents only discuss products seniors have approved in advance to discuss. Easily document appointments to review those Medicare products approved by seniors.

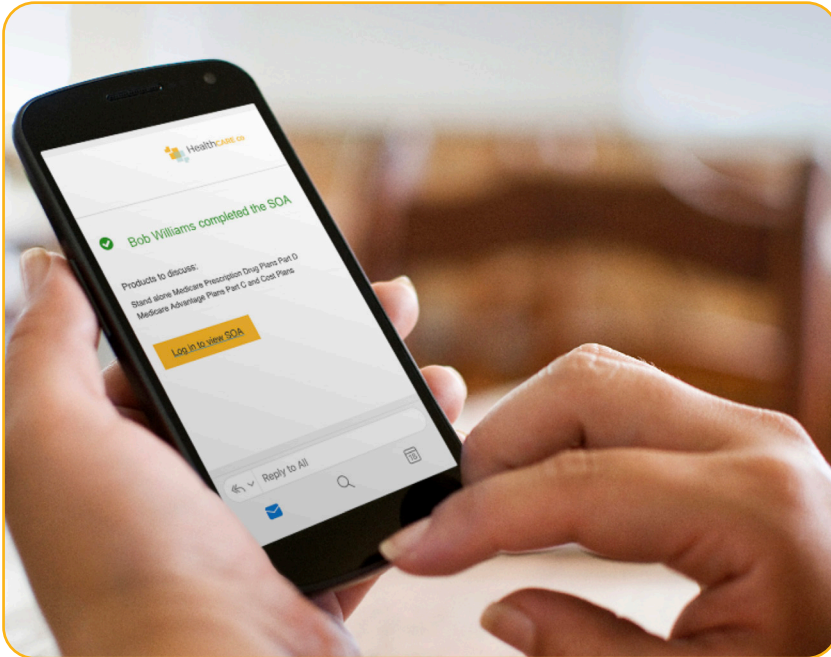
Connect with seniors wherever you are, at any time

Let your customers decide how they want to access their Scope of Appointment. Send a link via text or email for seniors to complete and sign their SOA.

Send link via text for seniors to complete their Scope of Appointment.



TIP: Download completed PDFs to print. Add or upload SOAs and store completed forms on the beneficiary profile to retrieve in the future.



Agent receives confirmation that beneficiary has signed their SOA.

This lets the agent know they can now complete their portion of the SOA.

Beneficiary receives confirmation SOA has been submitted.

