

FAQs about the new scope of appointment (SOA) process



CMS's **NEW 48-hour rule** for SOAs went into effect on October 1.

Here's what you need to know

What am I responsible for?

You're responsible for complying with all CMS requirements and maintaining your own records, including SOAs.

When does the 48-hour rule apply?

You must secure a scope of appointment (SOA) at least 48 hours before the scheduled personal marketing appointment with a prospect. This includes any outbound call you're making when responding to a business reply card (BRC).

Do I really have to wait 48 hours, or is 2 days the general rule?

Yes, you really have to wait the full 48 hours. If you collect an SOA from a prospect at 3pm on Monday, the appointment must be scheduled after 3pm on Wednesday.

What can I do during the 48 hours before meeting with the prospect?

Send them materials to review before your appointment.

When does the 48-hour rule not apply?

- During the last 4 days of a valid enrollment period
- Walk-in appointments (e.g., sales events)
- Inbound calls made by a prospect to conduct a telephonic presentation or enrollment

How does the new SOA regulation impact educational events?

Starting October 1, you can't collect SOAs at an educational event or hold sales events after an educational event.

Can I call a prospect in response to a BRC?

Yes, you can call a prospect to set up an appointment and complete an SOA, but the appointment must be set up at least 48 hours from completion of the SOA. DO NOT use the prospect-initiated call as a loop-hole to get around the 48-hour rule.

What if I'm speaking with a prospect (e.g., at an educational event or the grocery store) and they really want to have the appointment right away because they're traveling?

No, not unless the scenario falls into one of the exceptions provided above.

What about prospects who attend a sales event? Do I need to wait 48 hours to talk with them?

At the event, you can meet with prospects and collect SOAs in person as well as collect enrollment forms, as is currently permitted at sales events. If you want to meet after the event, you will need to collect an SOA and schedule the meeting 48 hours after collecting that SOA.

Can I fill out SOAs electronically?

You can easily complete SOAs inside of MedicareCENTER via SMS text or email.

How long is an SOA good for?

12 months.

Important reminder about record retention

Sales agents/agencies are required to keep and maintain any records, in accordance with their contract and CMS requirements.