



BluesMarketplaceSM

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September 6, 2017

Use updated *Scope of Sales Appointment Confirmation* form starting Oct. 1



What you need to know

To comply with guidelines from the Centers for Medicare & Medicaid Services, agents must complete a *Scope of Sales Appointment Confirmation* form before having marketing activities with Medicare beneficiaries in person or by phone.

We've updated our *Scope of Sales Appointment Confirmation* form, and agents must use this new form as of Oct. 1.

Action item

Blue Cross Blue Shield of Michigan has updated our *Scope of Sales Appointment Confirmation* form. As of Oct. 1, agents must complete the updated form before conducting phone and face-to-face marketing of Medicare Advantage products.

Time frame

Start using the new form as of Oct. 1.

Additional resources

Here are the documents you need to complete or share with your clients when conducting individual marketing appointments with Medicare beneficiaries:

- [Scope of Sales Appointment Confirmation form](#)
- [Meeting confirmation instruction sheet](#)
- [Nondiscrimination document](#)
- [Multi-language document](#)

In addition, please use the [ClearStone PDP \(Basic Blue[®] Rx\) SoA](#) form when discussing ClearStone. If you don't have this form available and only have the Blue Cross *Scope of Sales Appointment Confirmation* form, then list ClearStone as one of the plans represented in the agent section of the form.

These forms will also be available on the Agent Tool Kit on Agent Secured Services at bcbsm.com.

Questions? Contact your Blue Cross sales representative, managing agents or general agent.