

## SilverScript Electronic Scope of Appointment (eSOA)

Remember, CMS Marketing Guidelines state: all Plan/Part D Sponsor one-on-one appointments with beneficiaries, regardless of the venue (e.g., in home, conference call, library), are considered sales/marketing events and must follow the scope of appointment guidance. CMS has eliminated the requirement to document the scope of the appointment 48 hours prior to the appointment.

### **Obtain a completed and signed SOA in less than three minutes with the SilverScript eSOA.**

- The SilverScript eSOA process is quick and easy for both the agent and the client. it's only two steps: The agent starts the process. The client finishes the process.
- Here's how it works:
  - Agents log into the SilverScript Agent Portal and select "Electronic SOA" from along the links on the left side of the screen. Once the eSOA form is open, scroll down to the part of the eSOA that you normally fill in, to the section called "To be completed by Agent." Enter your client's information there, type your signature into the Agent Signature box, then enter your client's email address and click "Send Email."
  - Your client will receive an email asking for review and signature of the eSOA. It will contain a link. When your client clicks the link, the eSOA you filled out will be visible. Your client only needs to initial next to the products to discuss, type a signature, and then click "Return to Agent."
- By email, the agent will receive a PDF copy of the eSOA complete with digital signatures. The eSOA will also be available on the SilverScript Agent Portal for downloading later, if needed.
- Agents can even track the progress of the eSOA. In the SilverScript Agent Portal, you can see your "eSOA History" - which shows clients to whom you sent eSOAs, along with whether or not those eSOAs were viewed and signed.

eSOA information continues on next slide

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- Here are some Good to Know items about the SilverScript eSOA:
  - For privacy, the eSOA is only valid for 14 days. If your client did not click on the link to view and sign the eSOA within two weeks of when you sent it, then the link expired and will no longer work. If that happens and the client still needs an eSOA, you can send the eSOA again.
  - The eSOA is personal and specific to a single client, just like a paper SOA. You will fill in your client's name and information before you send the eSOA. If you need to get two eSOAs from both a husband and a wife for a single joint meeting - even if they share a single email address - it's no problem. Just send two eSOAs, one for each client to see and to sign.
  - The eSOA will not be sent automatically to SilverScript's enrollment verification@cvscaremark.com email box. The reason is simple - not every eSOA will result in a SilverScript application. The eSOA tool puts the eSOA into YOUR hands, and into YOUR files. When the time comes that you have an application and need to submit the eSOA, you have it. Just submit the PDF produced by the eSOA process in the usual manner, along with the application or other supporting documents.
  - Be sure to note the distinction between a "phone appointment" and a "telephonic enrollment." The eSOA is to facilitate phone appointments for agents working with their clients and prospects. The eSOA has nothing to do with telephonic enrollments, which may be taken only by agents who work in call centers under specific SilverScript contract terms, fielding inbound calls only and with sophisticated recording equipment.
- Additional information including an eSOA video tutorial and user guide are available on the SilverScript Agent Portal.