



Scope of Sales Appointment Confirmation Form

The Centers for Medicare and Medicaid Services (CMS) requires agents to document the scope of a marketing appointment prior to any individual sales meeting to ensure understanding of what will be discussed between the agent and the Medicare beneficiary (or their authorized representative). All information provided on this form is confidential and should be completed by each person with Medicare or his/her authorized representative.

Please check the box(es) below, beside the type of product(s) you want the agent to discuss.

A description of each product can be found on next page.

- Farm Bureau Health Plans Medicare Supplement (Medigap) Products
- Farm Bureau Advantage Plan HMO (Part C)
- Farm Bureau Health Plans Stand-alone Medicare Prescription Drug Plans (Part D)
- Farm Bureau Health Plans Dental/Vision Products

By signing this form, you agree to a meeting with a sales agent to discuss the types of products you initialed. Please note, the person who will discuss the product(s) is either employed or contracted by Farm Bureau Health Plans. They do not work directly for the Federal government. This individual may also be paid based on your enrollment in a plan.

Signing this form does NOT obligate you to enroll in a plan, affect your current or future enrollment status, or enroll you in a Medicare plan. Signing this form does NOT obligate you to enroll in a plan, affect your current or future enrollment or enroll you in a Medicare plan.

Beneficiary or Authorized Representative Signature

Date

**If you are the authorized representative, please sign above and print below:*

Print Authorized Representative's Name

Your Relationship to the Beneficiary

Product Descriptions

Stand-alone Medicare Prescription Drug Plans

Medicare Prescription Drug Plan (PDP) - A stand-alone drug plan that adds prescription drug coverage to Original Medicare, some Medicare Cost Plans, and some Medicare Private-Fee-For-Service Plans, and Medicare Medical Savings Account Plans..

Dental/Vision Products

Dental/Vision Products - Stand-alone plans offering additional benefits for consumers who are looking to cover needs for dental and/or vision. These plans are not affiliated with Medicare.

Medicare Supplement (Medigap) Products

Medicare Supplement (Medigap) Products - Plans to supplement Original Medicare, sold by private companies, that help pay some of the health care costs Original Medicare does not cover, like coinsurance and deductibles.

Medicare Supplement (Medigap) Products

Medicare Health Maintenance Organization (HMO) - A Medicare Advantage Plan that provides all Original Medicare Part A and Part B health coverages and sometimes covers Part D prescription drug coverage. You generally must get your care and services from doctors, other health care providers, or hospitals in the plan's network (except emergency care, out-of-area urgent care, or out-of-area dialysis).

This section to be completed by Farm Bureau Health Plans

Agent Name:

Agent Phone:

Beneficiary Name:

Beneficiary Phone (Optional):

Beneficiary Address Email Address:

Initial Method of Contact (Indicate here if beneficiary was a walk-in.)

Date of Appointment:

Agent Signature:

Farm Bureau Health Plans is prescription drug plan with a Medicare contract. Enrollment in Farm Bureau Health Plans depends on contract renewal.

S2668_FBTNMK23300_C Updated 09/01/2022