



Scope of Appointment Policy and Procedure for Care Improvement Plus Certified Selling Agents

Certified selling agents must obtain an agreement from prospects regarding the products they intend to discuss during any personal / individual sales appointments. Care Improvement Plus has implemented the Scope of Sales Appointment Confirmation Form that should be used to document this agreement.

Sales presentations to groups of beneficiaries do not require a Scope of Sales Appointment Confirmation Form be completed because they are not personal / individual events. A beneficiary may sign a form at a group sales presentation for a follow-up appointment (which can be held immediately following the sales presentation). The Scope of Appointment must be agreed upon and documented either in writing with the prospect's signature or by recorded phone conversation.

Care Improvement Plus requires you follow this process for obtaining and submitting the "Scope of Sales Appointment Confirmation Form" or recorded phone conversation:

1. Obtain Scope of Appointment agreement from a prospect prior to the sales appointment either:
 - a. Signed Scope of Sales Appointment Confirmation Form
 - b. Recorded phone conversation
2. Attend the sales appointment.
3. If the prospect decides to enroll in a Care Improvement Plus plan, the enrollment application must be completed and submitted along with a signed copy of the Scope of Sales Appointment Confirmation Form.

Submit the completed form along with the enrollment application or fax it to the Care Improvement Plus Enrollment Department at 1-866-686-2508.*

If an agent chooses to submit a digital recording, the recorded telephone conversation must include all mandatory elements from the form. All recorded phone conversations **must be received within 14 days** of receipt of enrollment application. Recordings should be named in the following format: lastname_firstname_SOA and may be submitted via:

- A password protected .wav file (file and password must be e-mailed to Care Improvement Plus separately) or
- Other digital formats such as CD or audio cassette.

Password protected .wav files emailed to: enrollment-support@careimprovementplus.com

Digital recordings should be mailed to:

Care Improvement Plus • P.O. Box 592689 • San Antonio, TX 78259 • Attn: Enrollment Dept.

Regardless if the prospect enrolls in Care Improvement Plus, you must keep a record of the Scope of Appointment for 10 years. Make sure to keep a copy for your records.

If you have any questions or concerns, please contact the Agent Hotline at 1-866-447-3608.

***If you enroll a prospect through the online enrollment application, the Scope of Appointment must be submitted separately (via fax, e-mail or mail).**

Note: we will accept any Scope of Sales Appointment Confirmation Form.