

UPMC *for Life* Telephonic Scope of Appointment

The telephonic Scope of Appointment (SOA) form can be completed by calling the Broker Resource Center toll-free at **1-855-289-3197**. We're available October 1 – December 31 seven days a week from 8 a.m. to 8 p.m. and January 1 – September 30 Monday through Friday from 8 a.m. to 8 p.m. and Saturday 9 a.m. to 3 p.m.

Instructions: To document the SOA, both you and your client will need to be on the line at the same time.

1. After receiving your client's agreement to a home visit or one-on-one appointment, advise your client that Medicare requires you to document the appointment with UPMC Health Plan. You can do this in two ways:

Calling the Broker Resource Center together	Calling the Broker Resource Center and conference calling beneficiary
Use the three-way calling function on your phone to call your client first and then the Broker Resource Center.	Call the Broker Resource Center and advise the representative you need to complete a telephonic SOA. Ask the representative to use their three-way calling function to call the beneficiary.

2. A customer service representative will greet you and ask your client to confirm the following:
 - Spelling of name
 - Address
 - Phone number
3. The customer service representative will read the SOA script and ask the beneficiary to agree.
4. Upon confirmation, you are permitted to conduct your home visit or one-on-one appointment.

If you have any questions, please contact your broker manager.

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UPMC Health Plan Medicare Program