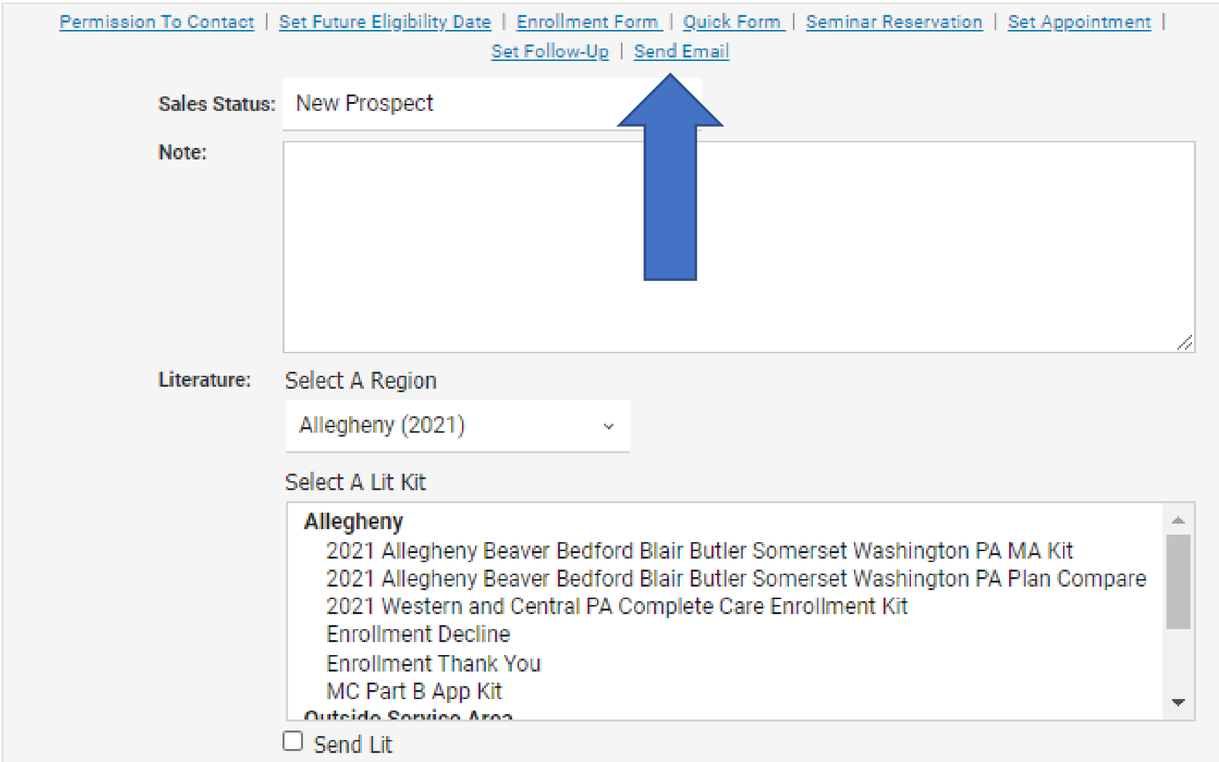
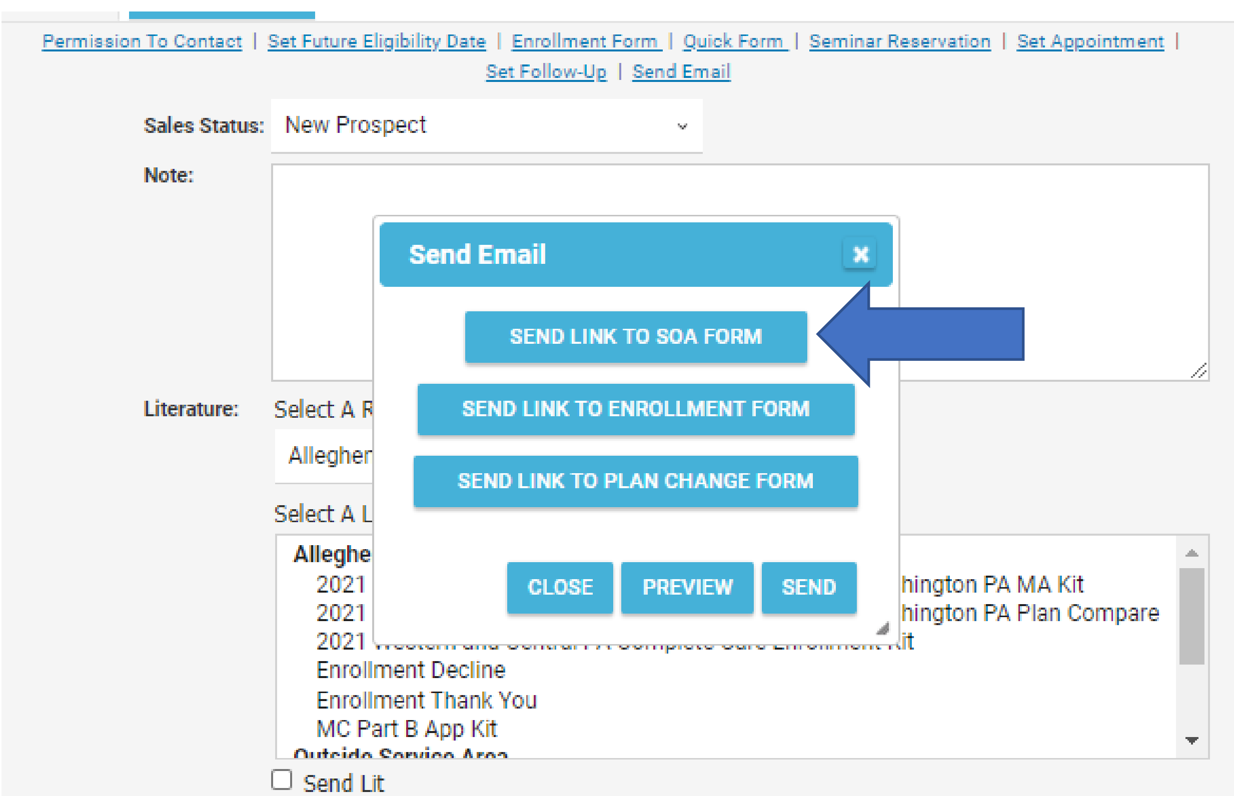
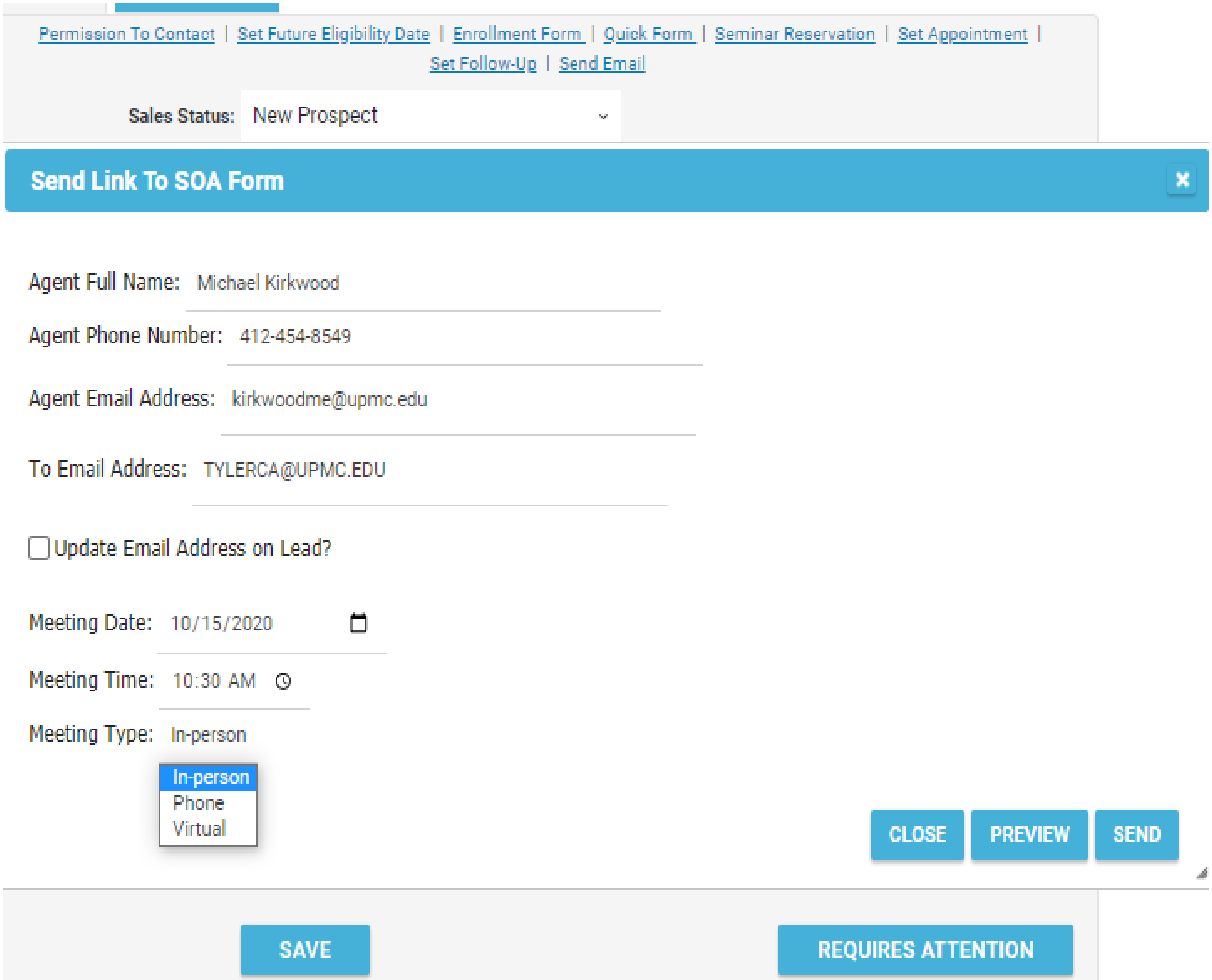
1. Open your client's lead record in Cavulus. Make sure that your client's lead record is assigned to you. To send a Scope of Appointment (SOA), click **Send Email** link:



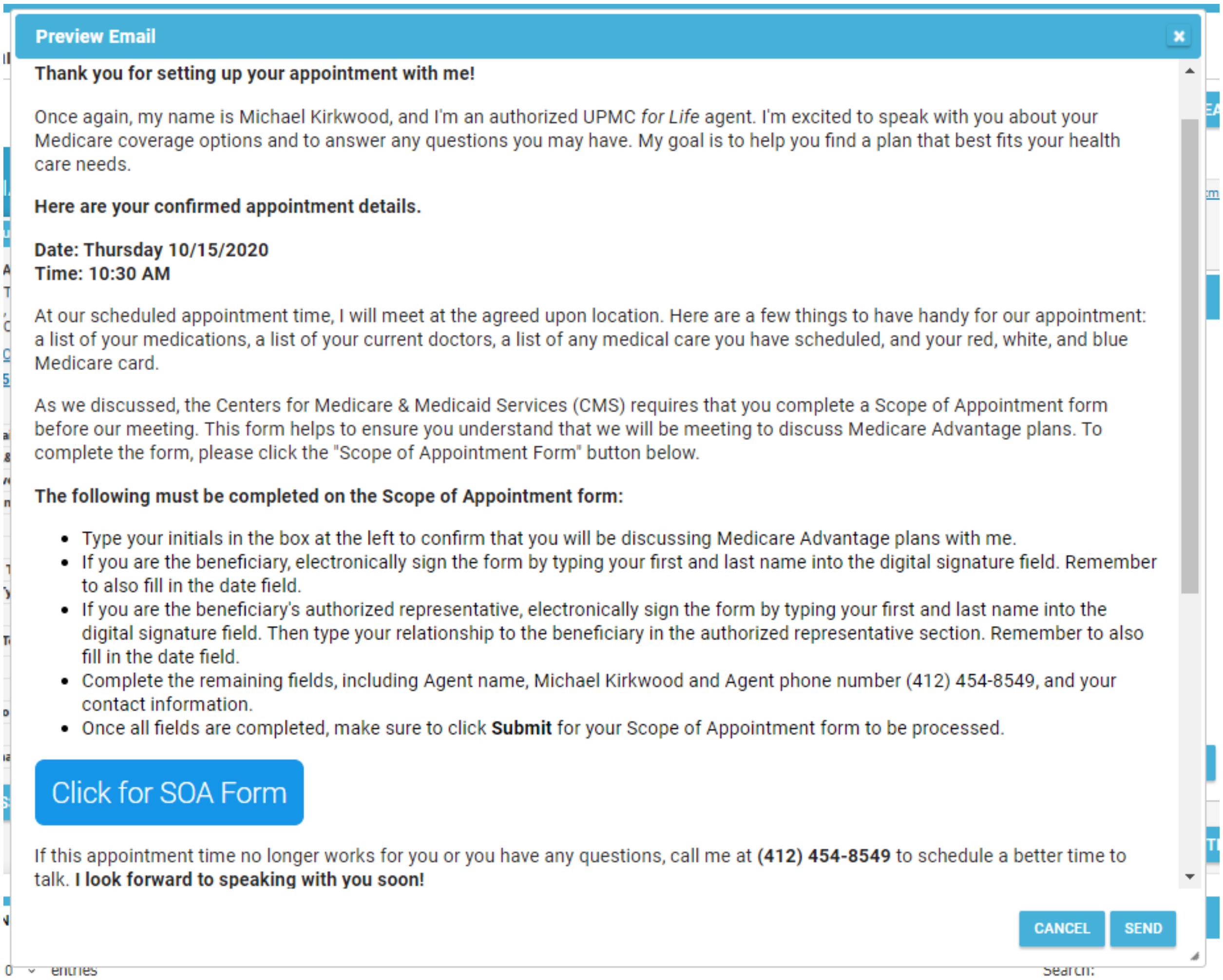
2. Click **Send Link to SOA Form**:



3. On this page, you will enter your contact info. If the lead already has an email address provided, it will be pre-populated. If not, you can add an email address and check **Update Email Address on Lead**, which will save the email address into the lead. From here, you will add the meeting date, time, and type. Once you've entered the information, you will want to hit **Preview** to view the email that will be sent to the beneficiary.



4. Preview for In-person meeting:



Preview Email

Thank you for setting up your appointment with me!

Once again, my name is Michael Kirkwood, and I'm an authorized UPMC *for Life* agent. I'm excited to speak with you about your Medicare coverage options and to answer any questions you may have. My goal is to help you find a plan that best fits your health care needs.

Here are your confirmed appointment details.

Date: Thursday 10/15/2020
Time: 10:30 AM

At our scheduled appointment time, I will meet at the agreed upon location. Here are a few things to have handy for our appointment: a list of your medications, a list of your current doctors, a list of any medical care you have scheduled, and your red, white, and blue Medicare card.

As we discussed, the Centers for Medicare & Medicaid Services (CMS) requires that you complete a Scope of Appointment form before our meeting. This form helps to ensure you understand that we will be meeting to discuss Medicare Advantage plans. To complete the form, please click the "Scope of Appointment Form" button below.

The following must be completed on the Scope of Appointment form:

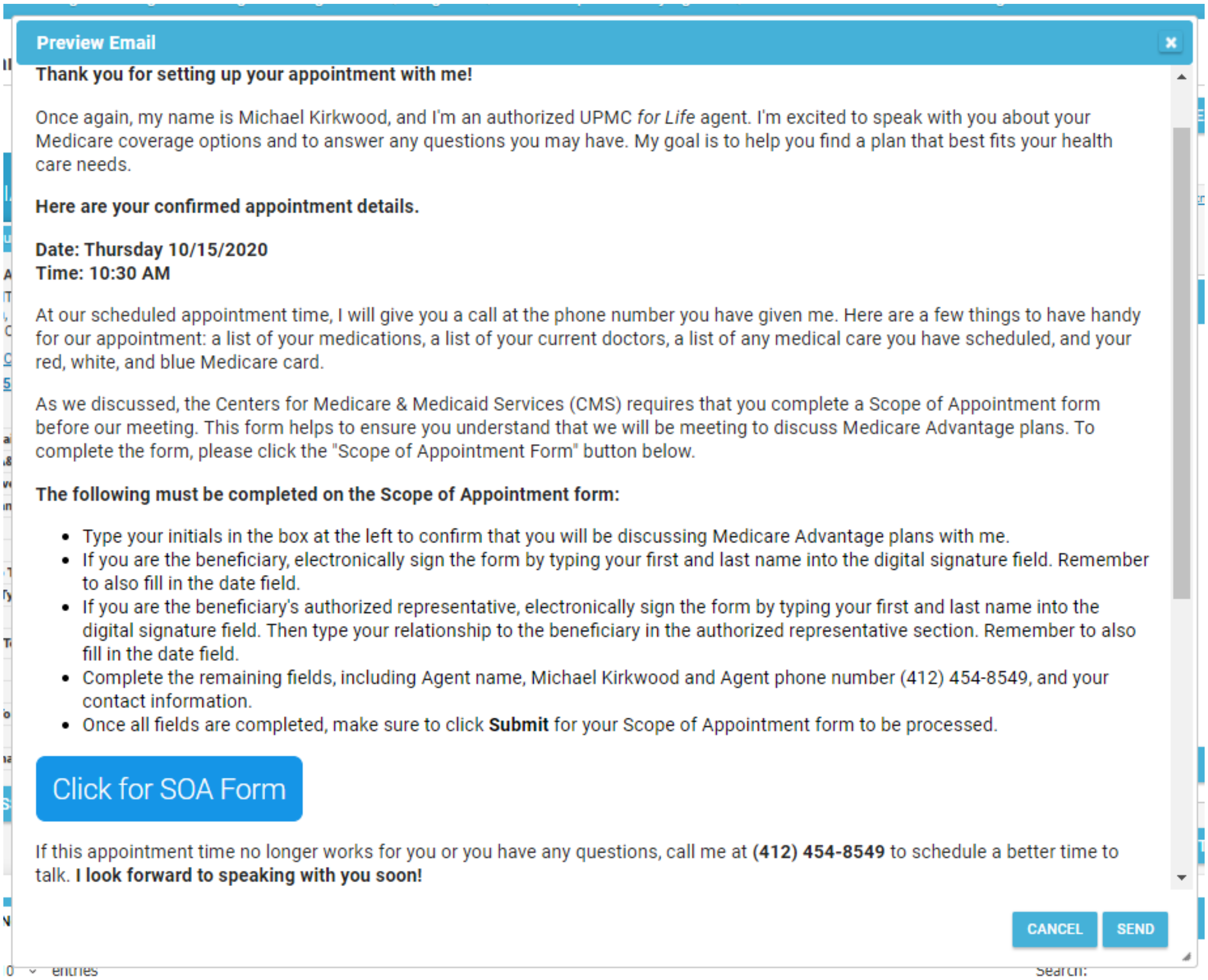
- Type your initials in the box at the left to confirm that you will be discussing Medicare Advantage plans with me.
- If you are the beneficiary, electronically sign the form by typing your first and last name into the digital signature field. Remember to also fill in the date field.
- If you are the beneficiary's authorized representative, electronically sign the form by typing your first and last name into the digital signature field. Then type your relationship to the beneficiary in the authorized representative section. Remember to also fill in the date field.
- Complete the remaining fields, including Agent name, Michael Kirkwood and Agent phone number (412) 454-8549, and your contact information.
- Once all fields are completed, make sure to click **Submit** for your Scope of Appointment form to be processed.

Click for SOA Form

If this appointment time no longer works for you or you have any questions, call me at **(412) 454-8549** to schedule a better time to talk. **I look forward to speaking with you soon!**

CANCEL SEND

5. Preview for Phone meeting:



Preview Email

Thank you for setting up your appointment with me!

Once again, my name is Michael Kirkwood, and I'm an authorized UPMC *for Life* agent. I'm excited to speak with you about your Medicare coverage options and to answer any questions you may have. My goal is to help you find a plan that best fits your health care needs.

Here are your confirmed appointment details.

Date: Thursday 10/15/2020
Time: 10:30 AM

At our scheduled appointment time, I will give you a call at the phone number you have given me. Here are a few things to have handy for our appointment: a list of your medications, a list of your current doctors, a list of any medical care you have scheduled, and your red, white, and blue Medicare card.

As we discussed, the Centers for Medicare & Medicaid Services (CMS) requires that you complete a Scope of Appointment form before our meeting. This form helps to ensure you understand that we will be meeting to discuss Medicare Advantage plans. To complete the form, please click the "Scope of Appointment Form" button below.

The following must be completed on the Scope of Appointment form:

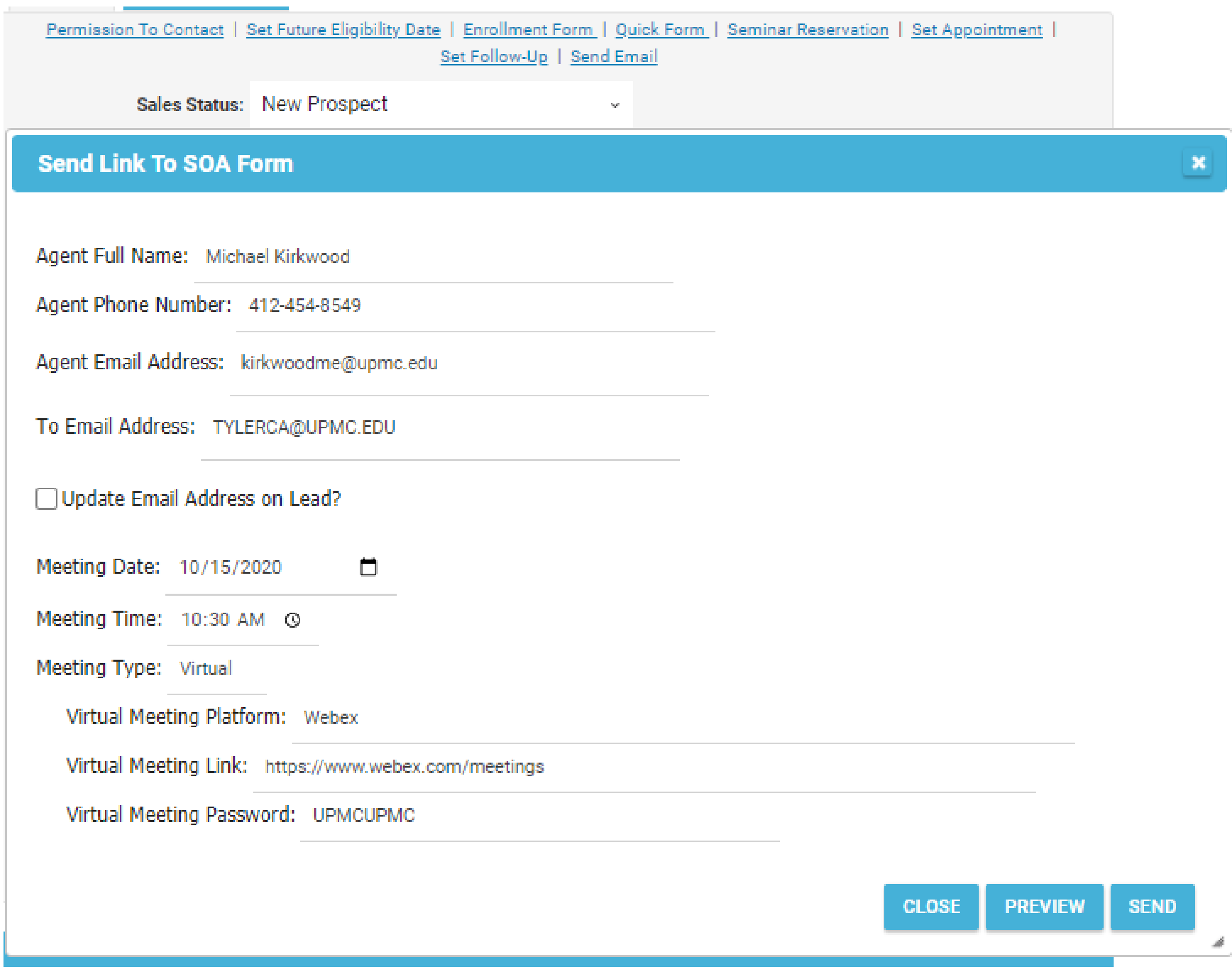
- Type your initials in the box at the left to confirm that you will be discussing Medicare Advantage plans with me.
- If you are the beneficiary, electronically sign the form by typing your first and last name into the digital signature field. Remember to also fill in the date field.
- If you are the beneficiary's authorized representative, electronically sign the form by typing your first and last name into the digital signature field. Then type your relationship to the beneficiary in the authorized representative section. Remember to also fill in the date field.
- Complete the remaining fields, including Agent name, Michael Kirkwood and Agent phone number (412) 454-8549, and your contact information.
- Once all fields are completed, make sure to click **Submit** for your Scope of Appointment form to be processed.

Click for SOA Form

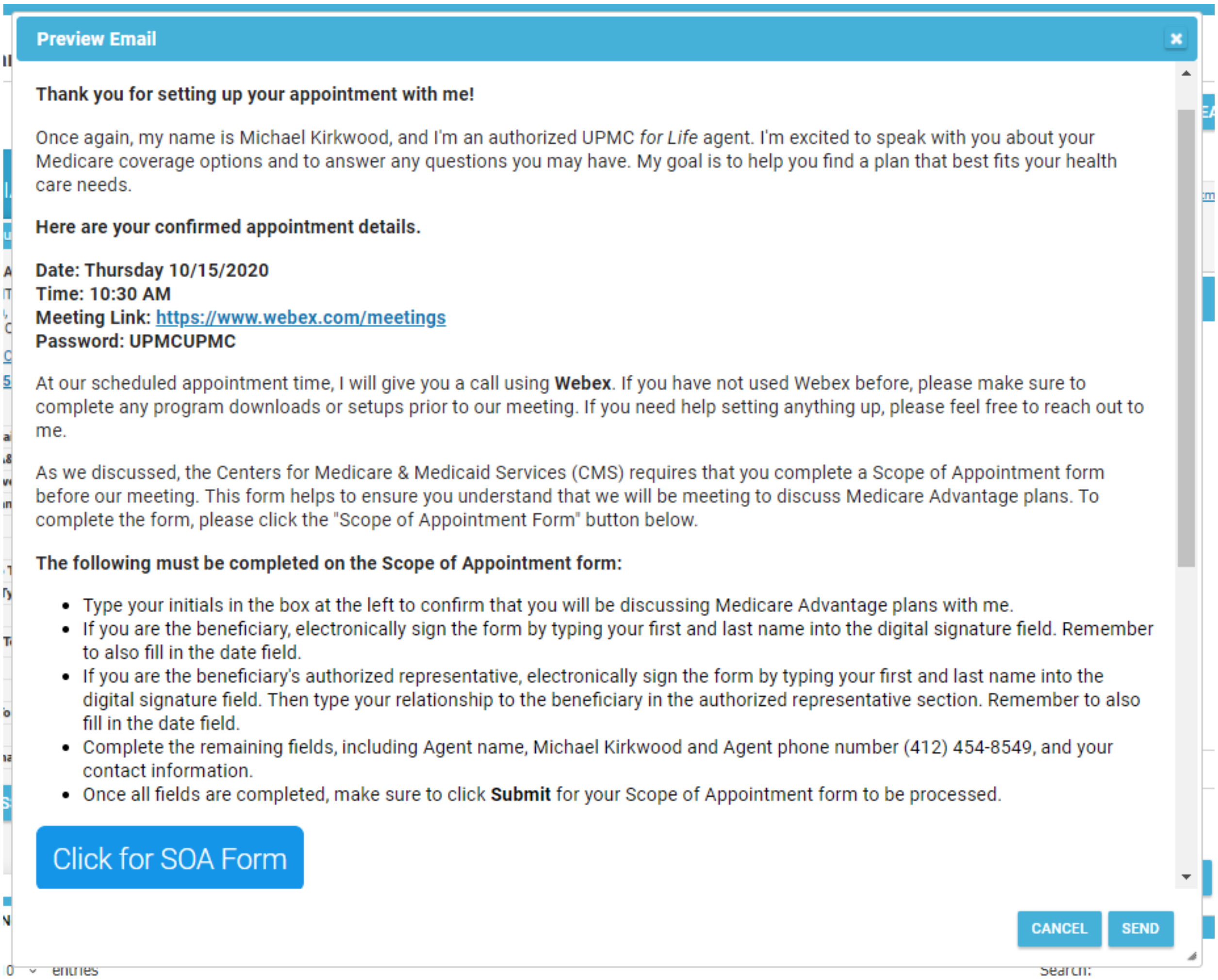
If this appointment time no longer works for you or you have any questions, call me at **(412) 454-8549** to schedule a better time to talk. **I look forward to speaking with you soon!**

CANCEL SEND

6. When sending out for a Virtual meeting, three additional fields will need to be populated:
   i. Meeting Platform
   ii. Meeting Link
   iii. Meeting Password



7. Preview for Virtual Meeting:



Preview Email

Thank you for setting up your appointment with me!

Once again, my name is Michael Kirkwood, and I'm an authorized UPMC *for Life* agent. I'm excited to speak with you about your Medicare coverage options and to answer any questions you may have. My goal is to help you find a plan that best fits your health care needs.

Here are your confirmed appointment details.

Date: Thursday 10/15/2020
Time: 10:30 AM
Meeting Link: https://www.webex.com/meetings
Password: UPMCUPMC

At our scheduled appointment time, I will give you a call using **Webex**. If you have not used Webex before, please make sure to complete any program downloads or setups prior to our meeting. If you need help setting anything up, please feel free to reach out to me.

As we discussed, the Centers for Medicare & Medicaid Services (CMS) requires that you complete a Scope of Appointment form before our meeting. This form helps to ensure you understand that we will be meeting to discuss Medicare Advantage plans. To complete the form, please click the "Scope of Appointment Form" button below.

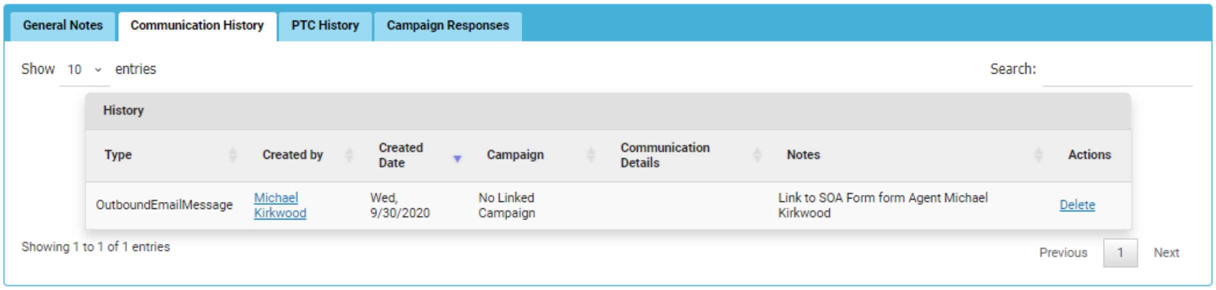
The following must be completed on the Scope of Appointment form:

- Type your initials in the box at the left to confirm that you will be discussing Medicare Advantage plans with me.
- If you are the beneficiary, electronically sign the form by typing your first and last name into the digital signature field. Remember to also fill in the date field.
- If you are the beneficiary's authorized representative, electronically sign the form by typing your first and last name into the digital signature field. Then type your relationship to the beneficiary in the authorized representative section. Remember to also fill in the date field.
- Complete the remaining fields, including Agent name, Michael Kirkwood and Agent phone number (412) 454-8549, and your contact information.
- Once all fields are completed, make sure to click **Submit** for your Scope of Appointment form to be processed.

Click for SOA Form

CANCEL SEND

8. After sending the eSOA, you can view the **Communication History** tab showing when the eSOA was sent out to the beneficiary.



9. Once the beneficiary completes the eSOA, it will be sent right back into your lead, and be viewable under the **Appointment History** tab.