

# Automating The **48-Hour Rule**

*Get Compliant*



AgentMethods®

With each passing year, the arrival of the Medicare Annual Enrollment Period (AEP) ushers in a fresh array of challenges for insurance agents. Just like clockwork, this year's AEP brings with it a new set of hurdles agents like yourself must clear to remain in compliance. More specifically, the 48-hour Scope of Appointment rule.

## UNDERSTANDING THE SCOPE OF APPOINTMENT

Implemented in the fall of 2023, the new 48-hour rule was implemented to prevent misleading marketing tactics and protect beneficiaries. The rule mandates that agents provide beneficiaries with a Scope of Appointment (SOA) form at least two days before a scheduled appointment.

The SOA must then be signed by the beneficiary at least 48 hours in advance of your appointment. The only exceptions include walk-in appointments and appointments that fall within 4 days of the end of the enrollment period. Scope of Appointment forms are then only valid for up to twelve months after the beneficiary's signing.

**(Note:** The Center for Medicare and Medicaid has not provided any guidance with respect to digital appointments such as phone-ins, chatbots, social media inquiries, and other means. We recommend requesting an SOA in these circumstances as well.)

For you, the insurance agent, the requirement to obtain an SOA creates yet one more step in an already complex process to enroll Medicare beneficiaries. And this is on top of attempting to retain and grow your book of business. The solution? Automation!



## AUTOMATING THE PROCESS

Your value as an insurance agent comes from your depth of knowledge and years of experience; not from following mundane processes. Therefore, it is important to automate any routine steps that do not require your personal input, including the collection of the Scope of Appointment.

This is where AgentMethods can help insurance agents just like. With a suite of tools developed by insurance agents for insurance agents, we help agents navigate the complexities of the enrollment period before, during, and after the AEP. More importantly, we help you retain your current clients, round out customer accounts with additional products, and attract new clients.



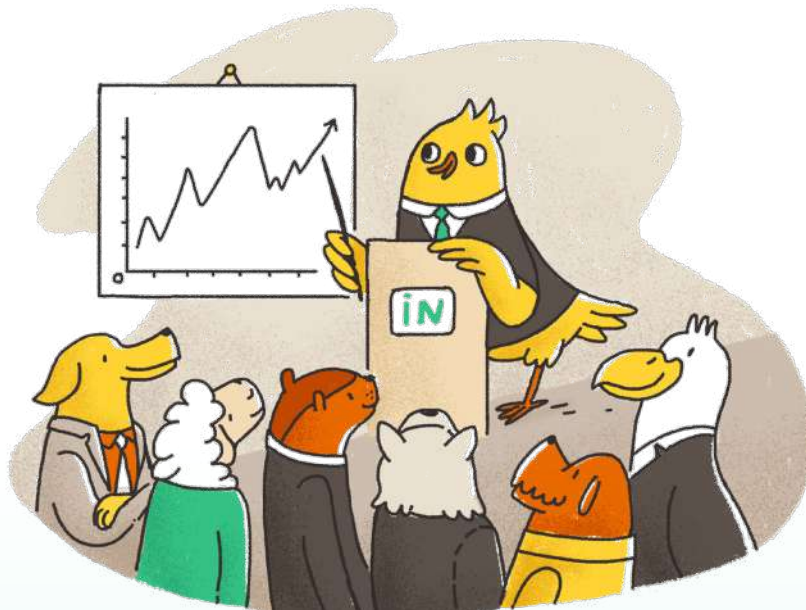
The time parameters associated with the new 48-hour SOA rule make it a particularly challenging process to adhere to. Not only is sending and tracking each SOA time consuming, doing so is prone to human error. It is critical insurance agents find a way to automate the entire scheduling process, from setting up appointment availability to sending reminders and collecting necessary documents such as the SOA form.

**Start Automating Insurance Sales**

## LEVERAGING TECHNOLOGY

Technology is moving at a blistering pace. It is common for insurance agents to either chase the newest shiny object or to remain frozen in time from analysis paralysis. But to remain competitive, retain renewals, acquire new clients, and round out accounts, insurance agents must adopt technology to automate their business. After all, time is money, and the more time technology can give back to you as an agent, the more money you will be able to earn.

Imagine eliminating the time typically involved from the back-and-forth communication of scheduling a client meeting. Then, having appointment reminders and compliance documentation automatically send to your contact without lifting a finger. Lastly, a way to remain in contact with your client by providing valuable and engaging information while enjoying your summer vacation.



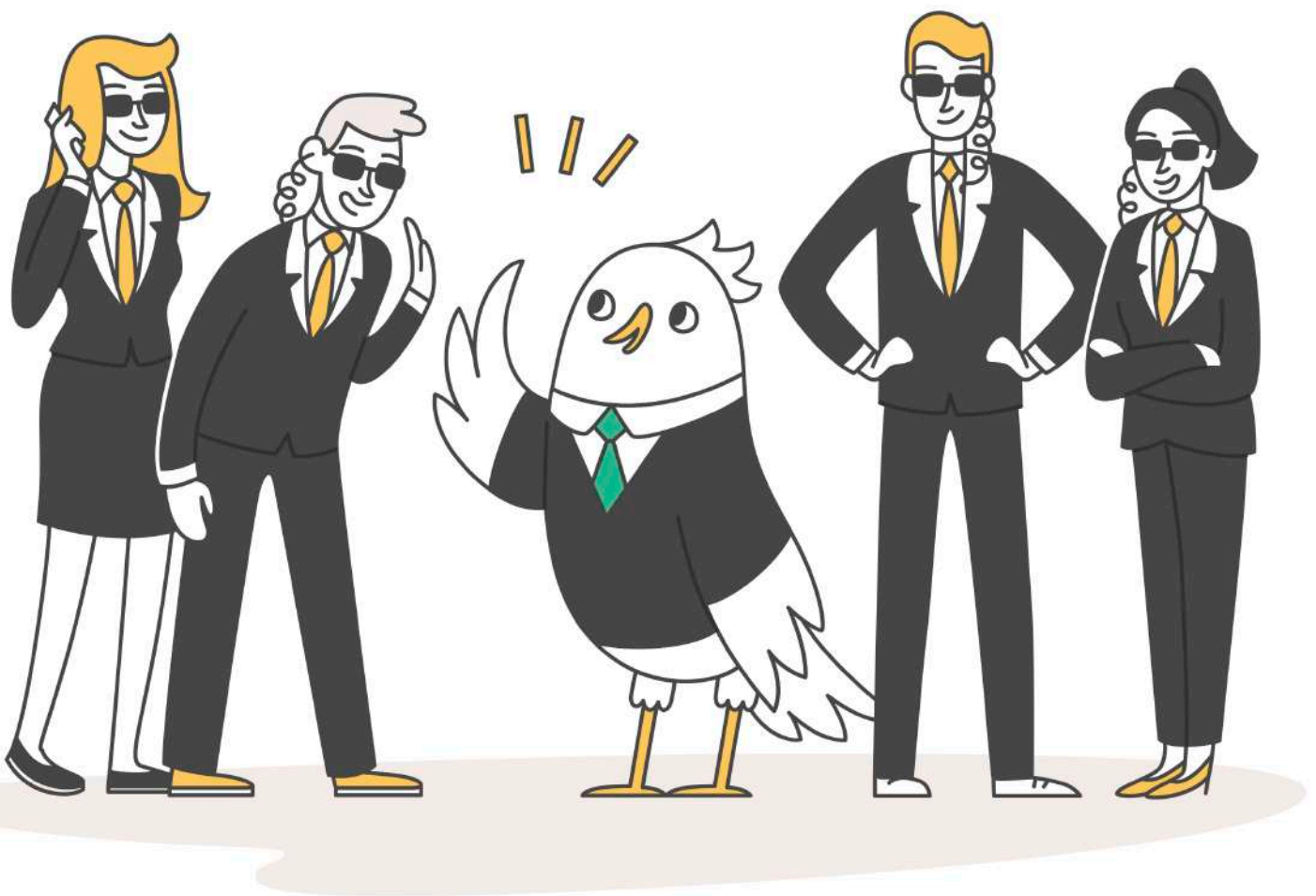
All of this is available today. However, the technology you choose must be deployed strategically. Just because an agent purchases a new tech solution doesn't automatically mean better efficiency will be achieved. Instead, agents should seek solutions with the ability to address many routine processes and automations simultaneously.

It is here where AgentMethods excels. Beginning with a professional website, our technology begins by engaging individuals from the moment they become an interested prospect. From there appointments are scheduled with ease, alerts are automatically set, and the required documentation sent. This type of automation not only saves you valuable time, but also enhances the client experience by providing a seamless and convenient scheduling process.

## COMPLIANCE MADE EASY

As a licensed agent, you are aware of the importance of staying compliant with Medicare regulations. The rules are complex and require insurance agents to keep up with CMS guidelines. Automating the AEP process significantly increases the receipt of signed SOA forms on time while decreasing the chance of future violations.

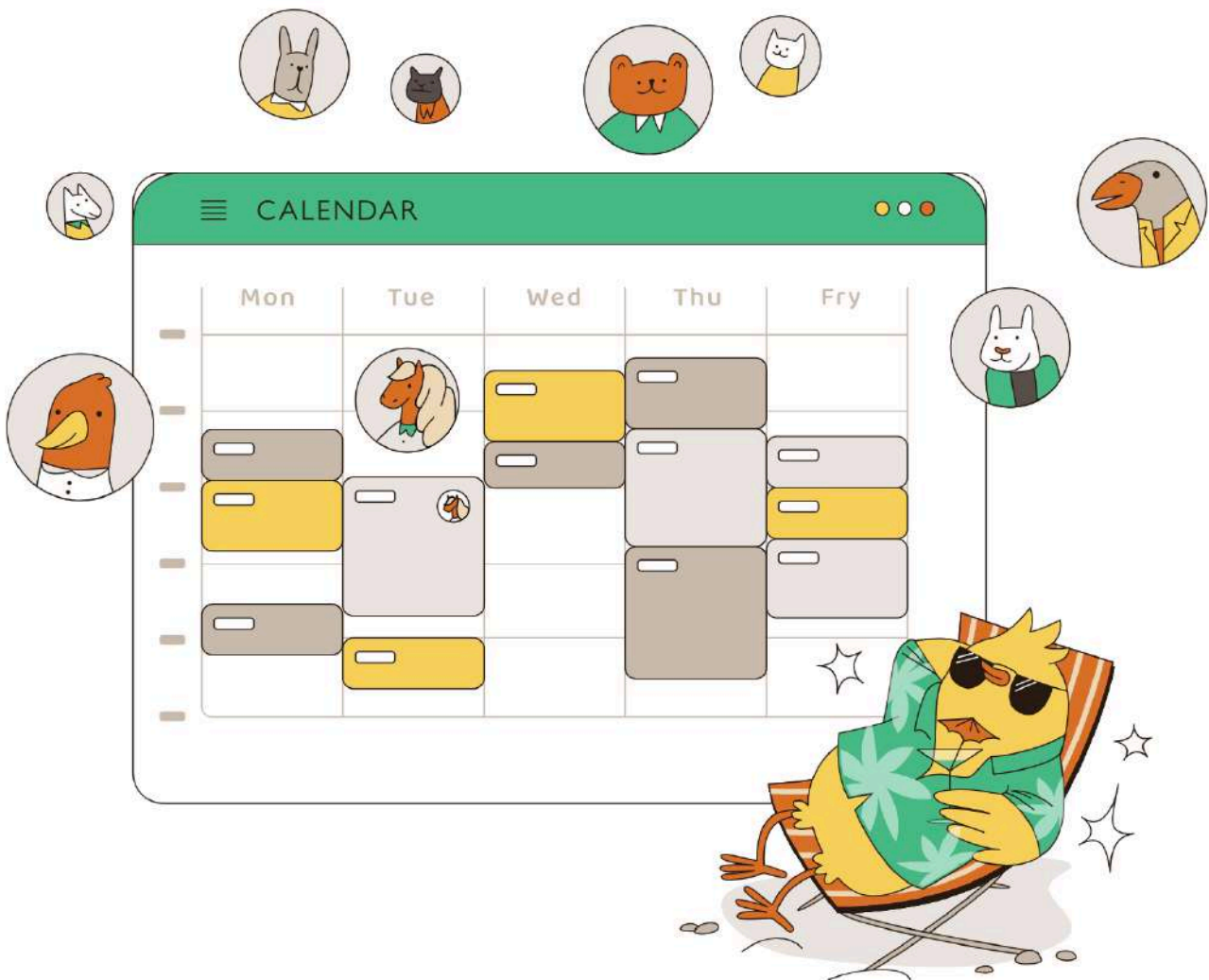
With AgentMethods, adhering to the new 48-hour SOA couldn't be easier. When clients book an appointment online, they are automatically prompted to e-sign the SOA form. Without any action by you or your staff, you'll be in compliance within minutes of the new strict regulation while making it nearly effortless for your clients.



## ONLINE SCHEDULING

Of all the tasks agents tackle, getting appointments booked on their calendar quickly has often been the sharpest thorn in their side. Instead of all the back-and-forth, let your prospects and clients pick a time that is convenient for them directly from your online calendar. Then, make sure they receive automated reminders to ensure they are prepared for the meeting.

AgentMethods makes the entire process simple by connecting your calendars to avoid double-booking. Additionally, virtual meetings can seamlessly be integrated with your favorite platforms such as Zoom, GoToMeeting, Google Meet, and Microsoft Teams. You will have a single location to see all your meetings and e-signed SOA's, streamlining and keeping you organized throughout the sales process.



**Automating Scheduling and Save Time**



## INCREASE RENEWALS WITH AUTOMATED MARKETING CAMPAIGNS

The AEP is a highly competitive period and agents must work hard to keep retention numbers as high as possible. The key to successful retention is by staying on top of your clients' minds, especially as AEP approaches.

At AgentMethods, we understand how critical client retention is for agent survival. This is why we've created one of the industry's most robust, automated pre-written marketing campaigns available. With just a few clicks, agents are able to nurture leads and engage with their audience consistently with high-value content. Automated email campaigns, ready-to-publish blog posts, and other marketing tools ensure a consistent and effective presence throughout the AEP.

## ONLINE SCHEDULING

The new 48-hour SOA rule will have its challenges. Keeping organized, cross referencing different lists, and manually checking to see if you have the client's SOA on file will be time consuming. You're going to have to chase customers and manage extra scheduling when an appointment falls through. The result is time lost and more busy work. And who needs more busy work?

AgentMethods has the solution to help you stay ahead and stay organized. Our automated scheduling system will collect the SOA when the appointment is made. The scheduling dashboard keeps track of the status whether they are ready for the appointment, at risk, or who need to reschedule because they didn't complete the form 48-hours before.

Your Upcoming Appointments [Download SOA](#) [Your Past Appointments](#)

ATTENDEE		STARTS AT ▲	JOINING INFO	STATUS	CAMPAIGN	APPOINTMENTS
Miles Davis Pam Davis	✔ SOA on file 🚫 No SOA on file	18 Jul 2023 13:30 (America/Los_Angeles)	Phone - i'll call you	🚫 48 hour rule	Turning 65 - Medicare Enrollment	RESCHEDULE   CANCEL
Count Basie Judie Basie		18 Jul 2023 15:00 (America/Los_Angeles)	Phone - i'll call you	Confirmed	Let's Review Your Insurance Options	RESCHEDULE   CANCEL
John Coltrane Alice Coltrane	✔ SOA on file ✔ SOA on file	25 Jul 2023 13:30 (America/Los_Angeles)	Phone - i'll call you	🕒 48 hour rule	Turning 65 - Medicare Enrollment	RESCHEDULE   CANCEL
Duke Ellington Martha Ellington	✔ SOA on file ⚠ No SOA on file	25 Jul 2023 14:00 (America/Los_Angeles)	Phone - i'll call you	⚠ 48 hour rule	Turning 65 - Medicare Enrollment	RESCHEDULE   CANCEL

Having an automated system handle the busy work is the best way to stay compliant and save time. The agents armed with new tools and who embrace technology will have a leg up this year. Instead of chasing SOA forms or trying to pin down times on their calendar, their calendars will automatically fill up with prospects.

If you want to make this your best AEP yet, let's talk!

**[Schedule a 1-on-1 demo here.](#)**

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