2027 AGENT GUIDE

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This Guide is intended for agent use only.

This guide is a living document and may be updated as information evolves. Details, processes, and recommendations can change at any time, so please check back periodically for the latest updates.

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OUR MISSION

KEEPING SENIORS HEALTHY AND INDEPENDENT

SCAN®, headquartered in Long Beach, California, is a Medicare Advantage Prescription Drug plan serving the needs of **455,000+ members.** Founded in 1977, SCAN employs over 1,400 employees who work diligently to help our members stay **healthy and independent.**

Today SCAN is the **2nd largest not-for-profit** Medicare Advantage plan in California. After a record breaking AEP in 2026, our service area includes 3 counties in Arizona, 19 counties in California, 2 counties in Nevada, 4 counties in Texas, and 3 counties in Washington. See Page 18 for the entire list of counties that make up our service area.

WHY SELL SCAN?

scan™

WHY SELL SCAN?

- SCAN is the second largest not-for-profit MAPD plan in CA – also the third largest in the nation.
- For over 49 years, we've only served people on Medicare.
- Your clients are supported by expert Member Service Advocates who specialize in your local market. And with no call time limits, every caller receives personalized, uninterrupted support.
- SCAN offers a broad portfolio of products for your eligible clients.
- We have competitive plans with rich benefits that can be sold year-round.
- Our voluntary disenrollment rates are lower than average - that means that during AEP you can concentrate on new business, not retention.
- Our Network Management team works to ensure that we have a full range of quality physicians and other respected providers to meet your clients' needs.
- SCAN's Member Service team regularly receives National recognition for the excellent service they provide.

455,000+ **Members, 6 States, 33 Counties**

STAR RATINGS

When you put your clients in plans that are 4 Stars and above, you keep your members healthy, independent and HAPPY to refer you.

What you should know...

The Five-Star Quality Rating System for Medicare Advantage Plans is overseen by the Centers for Medicare and Medicaid Services (CMS). The rating was developed to help consumers understand how well each Medicare Advantage plan:

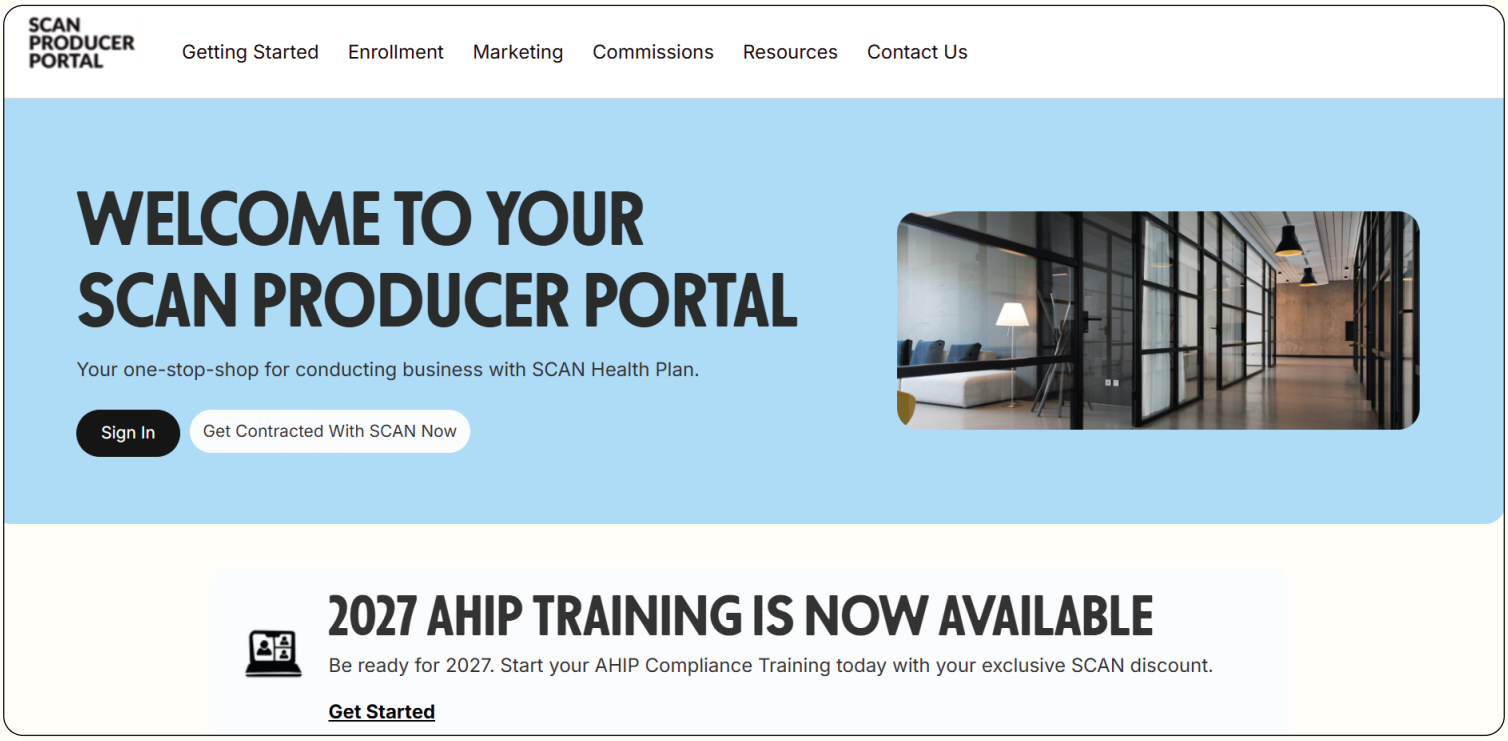
- Helps members stay healthy via preventive services such as screenings and vaccines
- Manages their members' chronic conditions
- Is rated for plan responsiveness and care
- Handles complaints, appeals, and voluntary disenrollment
- Provides telephone customer service
- Accurately explaining plan benefits
- Increasing SCAN member satisfaction by being professional and setting expectations at the time of enrollment
- Educating your clients about SCAN's ancillary benefits and how to access them.

Data to support these star ratings come from surveys, observation, administrative (claims) data, and medical records. Based on criteria established by CMS, each plan's rates and scores are calculated and stars are awarded and published annually prior to the Annual Enrollment Period (AEP).

Improve your member's health care and SCAN Star measures at the same time...

- Educate your client at time of enrollment
- Perform follow-up calls 30, 60 and 90 days after enrollment
- Ensure smooth member on-boarding
- Remind your client about:
  - PCP ASAP--within 90 days
  - Medication Adherence /
  - 3-month supply = 100 days Flu Shots and Medical Screenings

SCAN PRODUCER PORTAL



Check out how easy it is to use our SCAN Producer Portal

To access SCANProducerPortal.com, you'll first need to be contracted with SCAN. Once contracted, you'll have full access to all the tools and resources you need.
(If you are not yet contracted, simply click "Get Contracted with SCAN Now" on the Home Page.)

Each section of the portal is designed to support you in managing and growing your book of business. Depending on our relationship with your agency, you may have access to some—or all—of the following features:

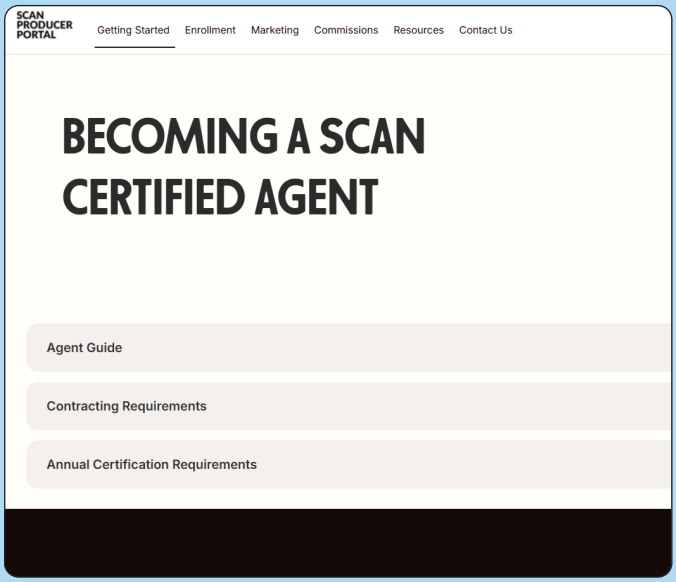
- **Electronic Enrollment** – Complete enrollments online.
- **Application Status** – Track all submitted applications.
- **Book of Business** – View member details, PCP/medical group, and contact info.
- **Commissions** – View statements and enroll in direct deposit.
- **Member Services** – Download ID cards, submit address updates, and make PCP/medical group changes.
- **Marketing Storefront** – Order SCAN marketing materials.
- **Training Tools** – Access resources and register for classes.
- **HRA Access** – Complete and submit Health Risk Assessments.
- **Lookup Tools** – Search providers, specialties, and formularies.
- **Sales Agent Guide** – View or print the latest guide.

SCAN PRODUCER PORTAL

Here's a closer look at the tools you'll find on **SCANProducerPortal.com**

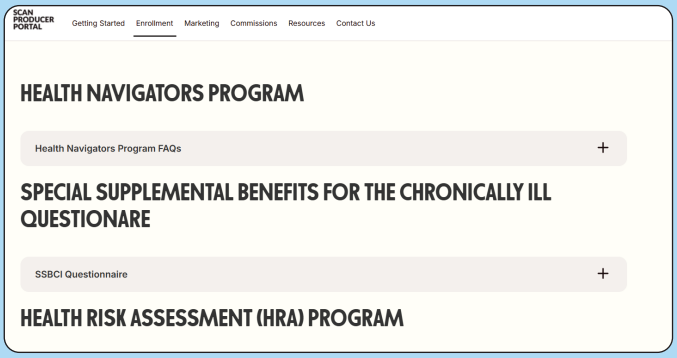
Getting Started

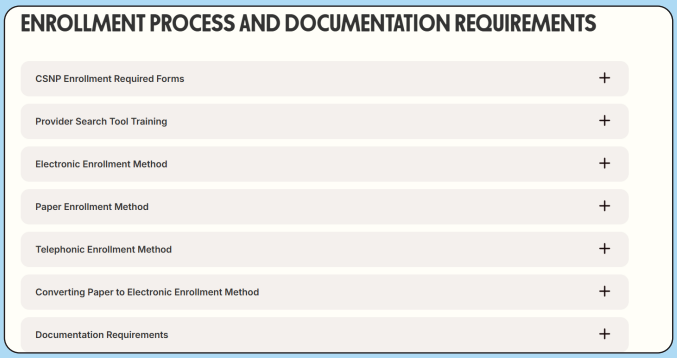
Getting Started is the perfect place to begin for new agents interested in selling SCAN. Here you'll find SCAN's contracting and training requirements.



Enrollment

This tab details each of the available methods for submitting your enrollment applications to SCAN. Additionally, you'll find SCAN resources such as the list of ancillary documentation required to accompany your submissions, our Electronic Scope of Appointment (SOA), and HRA Form.





SCAN PRODUCER PORTAL

Marketing

Select the Marketing tab to gain access to SCAN Marketing Storefront where you'll find all you need to know about your sales and marketing materials; how to order them, how to create your own personalized versions, and how to stay SCAN-compliant when conducting sales events.

SCAN PRODUCER PORTAL | Getting Started | Enrollment | Marketing | Commissions | Resources | Contact Us

MARKETING MATERIALS

How to order SCAN Materials Online −

When ordering online:
1. Log into the SCAN Agent Portal - Marketing Storefront
2. Select the county, materials, and language you wish to order
3. View your basket, review your shipping information and place your order.

An email confirmation will be sent after your order is placed. A UPS tracking number will be sent once your order is shipped.
Sign up for UPS My Choice Delivery

Broker Submission of Marketing Materials +

FREQUENTLY ASKED QUESTIONS FOR THE STOREFRONT

Commissions

Click Commission Guide to check out the Frequently Asked Questions (FAQ) section which will answer many of your payment-related questions. Print the Successor Agent Planning form to determine if you meet the minimum requirements that qualify you for our Successor Agent Program.

SCAN PRODUCER PORTAL | Getting Started | Enrollment | Marketing | Commissions | Resources | Contact Us

COMMISSIONS

COMMISSION GUIDE — Go

SUCCESSOR AGENT PLANNING FORM — Go

SCAN ASSIGNMENT UPON DEATH FORM — Go

Resources

Click on the Resources tab to access the SCAN Plan Finder and the Provider, Formulary, and Hospital Lookups all in one convenient spot. Importantly, in Contact Us, we provide a list of email addresses and phone numbers for each team member here at SCAN. We're committed to do all we can to support you and your success.

SCAN Resource Links

- SCAN Plan Finder
- Provider Lookup
- Formulary Drug Lookup
- Health Facility Lookup
- Plan Materials and Additional Forms
- Report Fraud, Waste and Abuse

Government Resource Links

- CMS / Centers for Medicare & Medicaid Services
- HHS / U.S. Dept. of Health and Human Services
- Social Security
- Medicare
- Medicare and You Handbook
- Medi-Cal
- CA Department of Health Care Services

SCAN AGENT PORTAL FAQ

What browsers does SCAN Agent Portal support?

SCAN Agent Portal supports a variety of browsers, but it is recommended to use Google Chrome for optimal performance.

PRODUCER PORTAL RESOURCES

1. Certification Training:

Get certified to sell SCAN Health Plan products by completing your certification training which includes:

- AHIP
- Certification Video
- Attestation of Policies and Procedures, Code of Conduct, and Sales Agent Guide
- Certification Test (Must score over 85% to complete certification)

2. Agent Self-Paced Training Courses:

These online courses allow brokers to learn independently, conveniently, at the comfort of their own home/office, and at their own pace.

3. Newly Developed How-To PDF Job Aids:

A few examples include:

- Order Member ID Cards
- Address Change Request
- PCP/Medical Group Request
- Provider Search Tools
- Pharmacy/Formulary Look-up
- Marketing Store Front

4. SEP & Medicare Compliance Reference Guides:

These innovative search tools are designed to support our brokers on-the-go faster and more efficient than ever. Brokers can find answers to common SEP questions and compliance scenarios.

SCAN QR code to access SCAN Producer Portal:

FOR NEW SCAN AGENTS

scan™

BECOMING A SCAN CERTIFIED AGENT

Becoming a SCAN-certified agent is simple and can be completed in just a few steps

1. Complete Contracting Requirements

To become authorized to sell SCAN products, you must hold an active insurance license and complete all required certifications.

To begin the contracting process, click **"Get Contracted with SCAN Now"** on the home page of this website and complete the request form. Once submitted, you will receive an email with a link to the Producer Portal, where you can complete your onboarding requirements.
You may contact the Broker Contracting team directly at **SCANBrokerContracting@SCANHealthPlan.com** for assistance.

Onboarding Process Includes:

- Agent contact verification
- Agent Agreement
- Training

Licensing

To sell SCAN plans, you must have current Accident & Health licenses that will not expire within 45 days of contracting.

Errors & Omissions (E&O)

Agents must sign the Errors and Omissions Attestation of Coverage (must not expire within 45 days of contracting). Your minimum E&O policy must be written for $1,000,000 per occurrence and $1,000,000 aggregate limit. After onboarding, agents are required to continue to maintain active E&O coverage. Evidence of coverage MUST be available upon request.

BECOMING A SCAN CERTIFIED AGENT

2. Next, Complete your Training

AHIP (Required)*

> Training curriculum includes modules on Medicare Marketing and Fraud, Waste and Abuse

> Completing this training also satisfies the CMS requirement for General Compliance training

> You must complete AHIP with a passing score of 90%

Online Certification Video & Exam (Required)

> Watch the ENTIRE online training video

> Attest to reading SCAN's P&Ps, Code of Conduct and Sales Agent Guide

> Complete the exam with a minimum passing score of 85%

BENEFIT ROLLOUT TRAINING (Strongly recommended)

> Attend one of the offered trainings for an in-depth understanding of our rich plans

- Live Webinar Training
- Face-to-Face Training

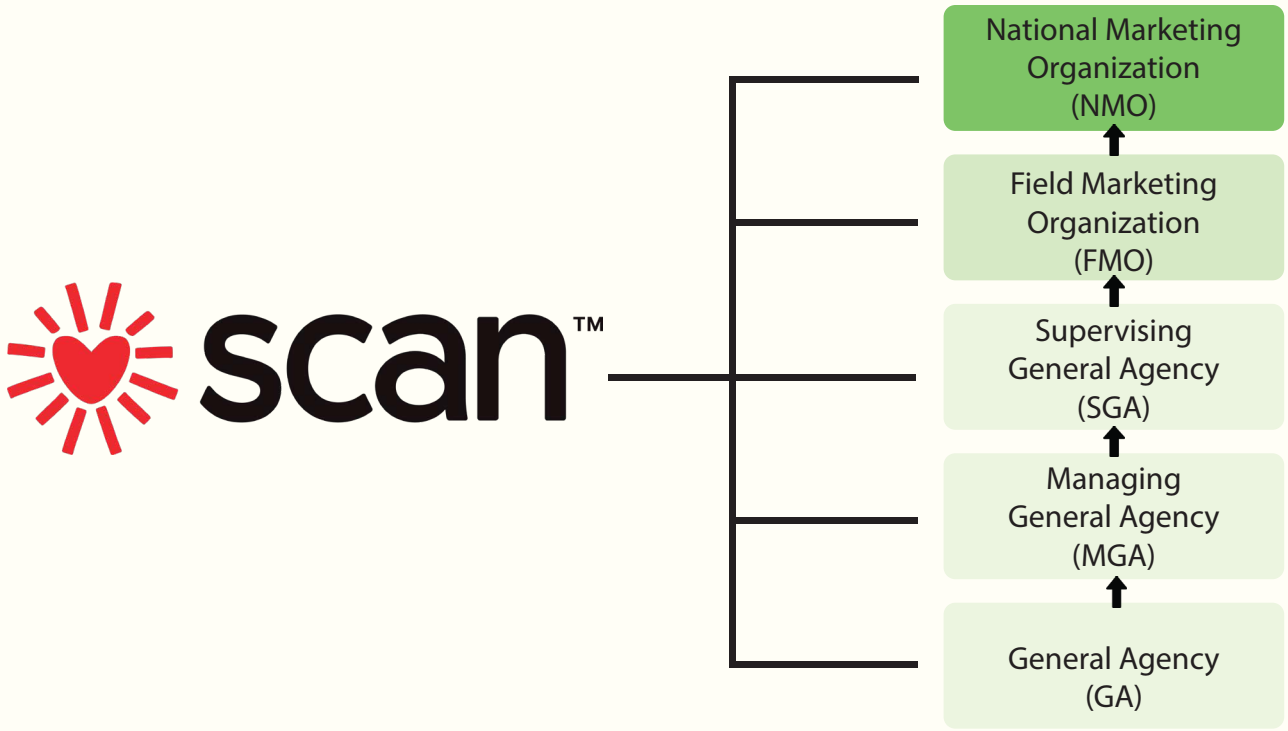
*** SAVE $50 off your AHIP Certification Fee through SCAN Producer Portal**

Agents are encouraged to access and complete their AHIP training.

The AHIP certification fee through SCAN is $125 and payment is conveniently made through our Portal.

AGENCY/AGENT HIERARCHY

SCAN contracts with agencies at multiple levels within its hierarchy. National Marketing Organizations (NMOs) represent the highest level of the hierarchy and are responsible for providing oversight, support, and compliance management for the various agency types within their downline.



Hierarchy Transfer Requests

SCAN allows active agents to change their agency hierarchy once per calendar year.

To request a hierarchy transfer, please email: SCANBrokerContracting@SCANHealthPlan.com and submit the following:

- Completed Adobe Sign Hierarchy Transfer Form
- New W-9 Form (required only if there are payable changes)

Please note:

- All required forms must be received by the 15th of the month for the transfer to become effective on the 1st of the following month.
- Hierarchy transfers are not processed between October 1 and December 31.
- Agents who terminate their contract after September 15 will not be eligible to re-contract until the next calendar year.

If you have any questions regarding the transfer process, please contact the Broker Contracting team.

TRAINING WITH SCAN

Select the Training tab on SCANProducerPortal.com to connect to the SCAN Training Website.
There you can enroll in required training classes, view recorded sales trainings and more.

Certification Trainings

> **Annual SCAN Certification Training**
> **One-time Connections Certification Training**
(Plan available only in Southern California: Los Angeles, Riverside, San Bernardino, and San Diego counties)

Completed 2027 Product Training

To be eligible to sell the Connections plan, agents must:

1. First complete the one-time Connections certification mandated by California and SCAN with a passing score of at least 85%.
2. Complete the Annual SCAN Certification Training every year.

NOTE: Once Broker Contracting informs you that your Connections certification is complete, have your Connections Certified Agent badge available whenever you discuss and/or present this plan.

SCAN Medicare Learning Academy (SMLA)

This live training program is designed to be a vital resource, delivering crucial information on the development journey for newcomers while also offering a comprehensive review for seasoned sales professionals. By deepening their knowledge and skill set, agents will be better equipped to assist clients with greater confidence, professionalism, and expertise.

Through this training, agents will:

> Deepen Understanding of the Medicare Program and processes
> Improve Technical and Interpersonal Skill Sets
> Apply Essential Tools and Resources Effectively
> Enhance Understanding of SCAN Plans & Key Benefits

- Medicare 101 Basics
- Seasonal Training- ex. MA OEP
- Benefit Trainings
- Reinforcing
  - SCAN plans
  - Services and Resources
- Industry updates/changes
- Focus on system mastery
- Effective sales skill sets
- Refining presentation skills
- Build your business

Self-Paced Training Courses

All basic training courses are available via the Producer Dashboard (under Educational Training tab)

SCAN'S PHARMACY OVERVIEW

Understanding Part D Stages

Stage 1: Yearly Deductible

Most SCAN Plans do not have a Yearly Deductible.

Stage 2: Initial Coverage

This stage begins when members fill their first prescription of the year. Members will pay the applicable copayments or a coinsurance for each prescription. SCAN pays the rest.

SCAN members stay in this stage until the "Out-Of-Pocket costs" reach $2,100 for the year. When this happens, members move into Castrophic Coverage.

Stage 3 - Catastrophic Coverage

In this stage, members pay $0 for the remainder of the year.

To search for a prescription drug – Select the "Find a Formulary Drug" search tool at

https://www.SCANHealthPlan.com/helpful-tools/formulary-search

To price out your clients medications, go to our new online Rx Calculator tool coming this AEP.

Medicare Prescription Payment Plan (M3P)

Medicare Prescription Payment Plan (M3P) is a new payment option designed for members on high-cost drugs (e.g., $600 or more per single prescription) that allows to spread out their payments through the year. **This payment option might help our members manage their expenses, but it doesn't save money or lower prescription drug costs.**

"Extra Help" from Medicare and medications assistance programs, for those who qualify, are more advantageous than participation in the Medicare Prescription Payment Plan. All members are eligible to participate in this payment option, regardless of their income, but not all are likely to benefit from this payment option.

To learn more about M3P, please visit our website or www.Medicare.gov .

SCAN'S 2026 HEALTH PLANS BY COUNTY

SCAN offers its Classic Plans and Chronic Special Needs Plans all year long to Age-Ins, Move-Ins, and those with other types of Special Elections Periods (SEPs). For any enrollment outside of AEP, always check the SEP's requirements.

To locate the available plans in your area, please reach out to your local BAE or go to
https://www.SCANHealthPlan.com/scan-resources/plan-materials/benefit-highlights

To access SCAN's Supplemental benefits, refer to the Benefit Highlights or go to
https://www.SCANHealthPlan.com/supplemental-benefits

CA

Northern	Central	Southern
San Mateo	Madera	Los Angeles
Alameda	Fresno	Orange
San Francisco	Kings	Riverside
Stanislaus	Tulare	San Bernardino
Santa Clara		San Diego
Placer		Ventura
Yolo		
San Joaquin		
Sacramento		

NV

Clark
Nye

TX

Bexar
Harris
Fort Bend
Montgomery

AZ

Maricopa
Pinal
Pima

WA

Pierce
Spokane
Thurston

CLIENT ELIGIBILITY

Is your client eligible? They are if they:

>Are entitled to Medicare Part A, and enrolled in Part B.

>Live in SCAN's service area.

>Are a U.S. citizen or lawfully present in the United States.

>Understand that they must continue to pay Part B premiums (if not paid for by Medicare or another third party).

ENROLLMENT PERIODS

For those just turning 65

Three months before, the month of,
and three months after their 65th birthday.

Special Enrollment Period (SEP)

All year round

Beggining October 15 (and ending December 7)

Annual Enrollment Period (AEP) - Switch to any plan they wish. Their new plan will go into effect on January 1

OEP Between January 1 and March 31

Beneficiaries have one allowable switch from their MAPD Plan and can either:

- Return to Original Fee-For-Service Medicare plus a Prescription Drug Plan, or
- Select a new MAPD plan.

New to Medicare

For new Medicare beneficiaries who enrolled in an MA/MAPD plan during their ICEP:
During the month of entitlement to Part A and Part B through the last day of the third month of entitlement, they have one allowable switch from their MA/MAPD plan. They can either:

- Return to Original Fee-For-Service Medicare plus a Prescription Drug Plan, or
- Select a new MAPD plan.

WITH SCAN, YOU CAN EVEN SELL DURING LOCK-IN! In addition to Special Enrollment periods, (which may allow applicants to join, switch or drop an MA plan outside the AEP or MA-OEP), we also have products you can sell during lock-in

SPECIAL ENROLLMENT PERIODS (SEP)

Beneficiaries may enroll other times during the year if they:

>Move out of their existing plan's service area

>Are institutionalized

>Have limited income and resources, and qualify for Low Income Subsidy (LIS) (aka Extra Help)

>Are dually eligible for Medicare and Medicaid

>Many other SEP's may be available, and special rules apply. For information on additional election periods please go to Medicare.gov or use the QR code below to access SCAN's SEP Resource Guide

Whenever they enroll in a new Medicare Advantage plan, they are automatically disenrolled from their previous plan.

Scan the QR code to log into the Producer Portal to find the SEP resource guide.

APPLICATION ENROLLMENT PROCESS

Before You Enroll the Client

- **COLLECT** a signed SCOPE OF APPOINTMENT (SOA) PRIOR to presenting any SCAN plan. Keep the SOA in your records for 6 years (Effective 1/1/27). For more information regarding SOA rules, refer to Page 23.
- **CONDUCT** a thorough needs analysis to choose the right plan for their health care needs.
- **COMPLETE** a compliant Sales Presentation on your client's plan choice using SCAN Benefit Highlights and the SCAN Sales kit.

NOTE: To be processed for enrollment eligibility for the first of the following month, all applications must be received by the end of the previous month.

IMPORTANT RULES AND REQUIREMENTS

You're ready to submit the enrollment for your client. Before you do, double-check the information we've provided here to make sure your submission goes smoothly.

Additional Documentation Checklist

Please complete and submit these required documents

Required Forms for All Plans

- ✓ Scope of Appointment
- ✓ Dental Enrollment (for optional Dental coverage

The Provider Chronic Condition Verification Form (to be completed by the Physician) is required for C-SNPs.

- ✓ Chronic SNP Pre-Enrollment Qualification Assessment
- ✓ Permission to Send Health Information

Additional Documentation Checklist

Always provide the beneficiary with:

- A Sales kit which contains:
  - **a)** Summary of Benefits
  - **b)** Multi-language insert
- The Plan Star Rating document

THINGS TO REMEMBER

- Any changes or errors must be initialed by the enrollee
- Just one plan name should be checked
- If a plan has a premium or the prospect owes a Part D late enrollment penalty – a payment option must be chosen
- Include the SCAN-contracted Primary Care Physician's name and Medical Group ID number
- Have the member or Authorized Legal Representative (aka Power of Attorney) sign and date the Enrollment form
- Make certain your enrollment form is legible
- If enrolling electronically, complete the Receipt of Enrollment form and leave with your client as proof of enrollment
- During the enrollment process, agents must clearly communicate the impact of a client's enrollment decision on their existing coverage

RULES FOR SCOPE OF APPOINTMENT AND CONSENT TO CONTACT

Before You Enroll the Client

SCAN Certified Agents have access to Scope of Appointment (SOA) and Consent to Contact (C2C) forms on the SCAN Marketing Storefront. SOA is also available electronically on our Electronic Enrollment Platform.

SCOPE OF APPOINTMENT (SOA) forms are valid 12 months from the date they were signed by the beneficiary. It's possible that you may need to get more than one SOA form signed prior to completing the client's enrollment application.

CONSENT TO CONTACT (C2C) forms and **BUSINESS REPLY CARDS (BRCs,** also known as **Lead Cards**), are valid for 12 months from the date the beneficiary signed it or requested additional information. For example, a C2C or BRC signed on March 2nd allows you to contact prospects until March 1st of the following year

NOTE: Brokers and Agencies must keep SOA/C2C records for 10 yrs. SCAN may request proof of SOA/C2C at any time for audit purposes. Do not send to SCAN unless requested.

WAYS TO ENROLL YOUR CLIENT

Paper Enrollment

When you're Face-to-Face with your client using a SCAN Sales Kit with paper enrollment forms
Complete the paper enrollment forms and have your client sign and date them to confirm their enrollment.
Then give them the Receipt of Application form (found in the Sales kit). Be sure to capture your client's email ad-dress and have them opt in for text messages. This is the best way to keep them informed.

ENSURE THAT:

– The Medicare Beneficiary Identifier (MBI) is in the correct format and doesn't include the letters "S, L,O, I, B, or Z"

– Any address that includes Apt, Unit, Spc, etc. should be included on "Address Line 2" to ensure members receive their ID cards within a timely manner

– Any changes or errors were initialed by the enrollee

– Just one plan name is checked

– A payment option is chosen if a plan has a premium, or the prospect owes a Part D late enrollment penalty

ENSURE THAT: (CONTINUED)

The Primary Care Physician's name and Medical Group ID number is included and exactly matches what appears in SCANHealthPlan.com

• If a Preferred Provider isn't chosen, an available PCP will be automatically assigned to you

– The member (or Authorized Representative) signs and dates the Enrollment form, and that you submit the paper enrollment within 24 hours following signature

– Your enrollment form is legible

– **You get paid – include your name and National Producer Number (NPN)**

HEALTH RISK ASSESSMENT (HRA)

Follow this process for submitting the HRA with a paper enrollment.

1. Go to https://scanproducerportal.com
2. Click the "Enrollment" tile
3. Click the "plus" icon next to "Health Risk Assessment (HRA) Incentive Program"
4. Select either English or Spanish
5. Complete the HRA and click Submit
6. That's it! The HRA will automatically be sent to BrokerHRA@scanhealthplan.com.

NOW YOU'RE READY TO SUBMIT

SCAN offers a variety of methods for submitting your applications. Please check with your agency for specific guidelines.

Submit all paper applications to SCAN within 24 hours of the beneficiary's signature date. On Page **21**, in the
Additional Documentation Checklist section, you'll find the checklist of forms that you'll need to include with
your enrollment submission. Choose one of these ways to submit your paper application:

Overnight to:

SCAN Headquarters Enrollment, Reconciliation & Premium Billing Department
3800 Kilroy Airport Way, Suite 100 , Long Beach, CA 90806

FAX to (any of these numbers)

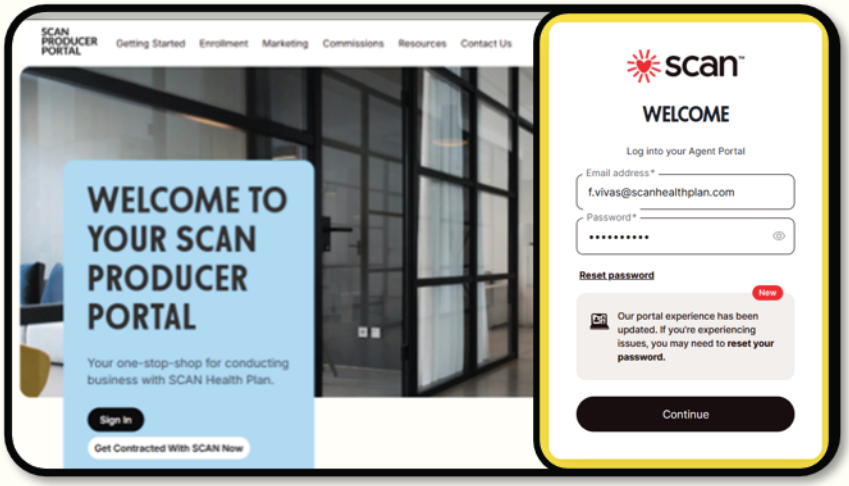
(562) 989-5243 (562) 308-3626
(866) 951-6318 (866) 951-0712

Note: *Each application must be faxed individually. Bulk Fax is not accepted.*

ELECTRONIC ENROLLMENT

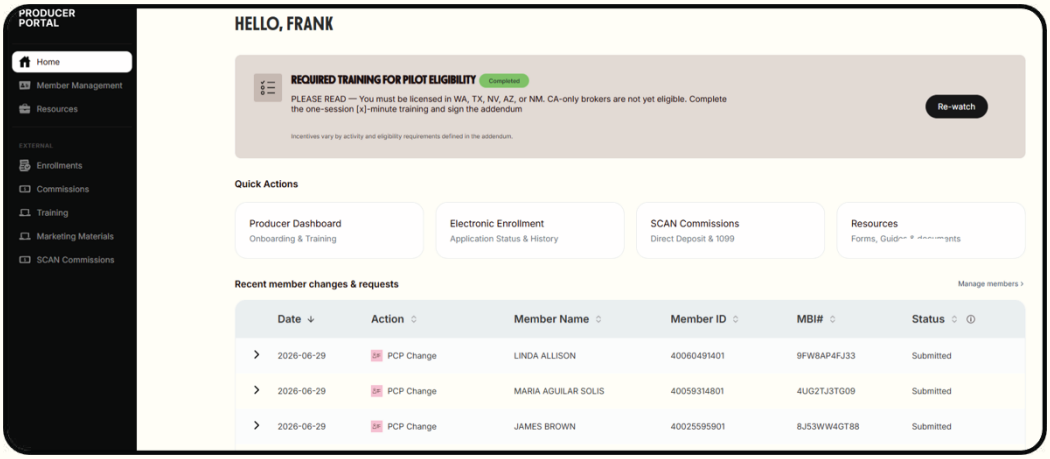
Accessing Connecture, SCAN's Electronic Enrollment Platform.

1. Go to SCAN Producer Portal
   https://www.scanproducerportal.com/



2. Enter your username and password

3. On Quick Actions, click "Electronic Enrollment" tile. The Dashboard loads upon successful login.



Click below to unlock your simple, step-by-step guide to mastering the Connecture Enrollment Platform

Click Here to View

Or view by following the link: https://vimeo.com/1204632128?fl=tl&fe=ec

Before You Leave Your Client

Submit the Electronic Enrollment to SCAN immediately, while you are with the client.

Give them the:

- Receipt of Application (found in the Sales Kit) with the Confirmation Number generated
- Sales Kit which contains the Summary of Benefits, Formulary, Multi-language insert and Plan Star Rating document

Telephonic Confirmation of Intent to Enroll

When you're not able to meet with your client face-to-face, and they don't have access to email, we still have an option for you!

What is Telephonic Confirmation of Intent to Enroll?

It's a 3-way phone interview that agents and applicants must complete together so that SCAN can process the enrollment application while making sure the submitting agent gets credit for the application.

Call SCAN's Telephonic Confirmation Representatives at **(855) 662-7226**
Monday–Friday from 7:00 am – 6:00 pm PST . All calls are recorded.

Overview of Process

- The agent conducts a compliant sales presentation and completes a paper enrollment over the phone
- When the prospect consents to finalizing enrollment, the agent initiates a 3-way call with SCAN and the agent stays on the line
- The Telephonic Confirmation representative validates the prospect's intent to enroll by asking both agent and prospect a series of questions.
- The representative then provides a confirmation code to the agent. Enter this code on the Enrollee Signature line of the Enrollment form.
- The agent enters the code on the enrollee signature line of the enrollment form in lieu of a "wet" signature
- Agents must retain the completed application themselves for 10 years and be able to provide the paper application if CMS requests it at a later date.

Resolving Enrollment Issues

PLEASE UNDERSTAND THAT IT CAN TAKE 7 DAYS TO PROCESS AN APPLICATION AFTER SCAN RECEIVES IT.

Incomplete Enrollments

If you are notified that you submitted an incomplete enrollment, correct and resubmit that enrollment within 21 days of the application date. If you miss that deadline, you will need to submit a new application.

Incomplete Enrollments Based Upon a Special Election Period (SEP)

You need to resolve this enrollment issue within seven days or a new application must be submitted.

PLAN CHANGES

For plan changes, brokers should facilitate the enrollment using an approved electronic enrollment option rather than contacting Member Services to process the plan switch. Brokers and members have several options available:

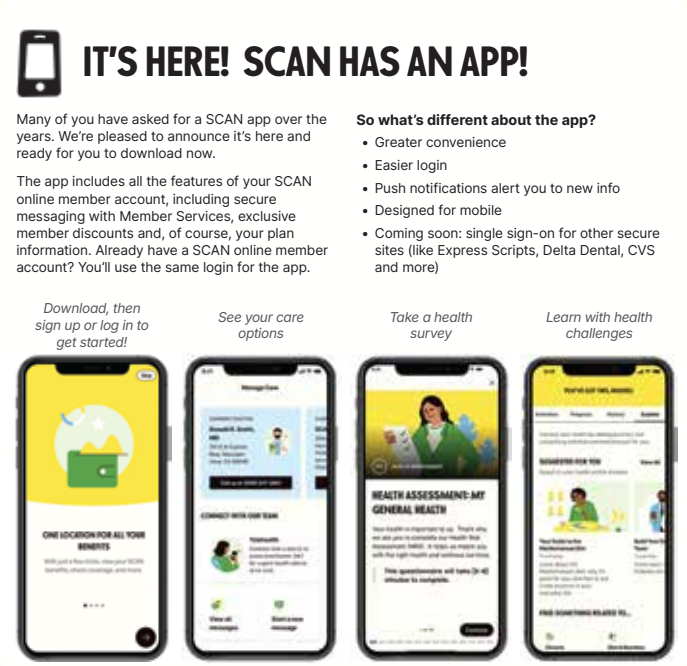
- Broker-Assisted Enrollment: Brokers may complete the plan change using their preferred electronic enrollment platform.
- Member Self-Enrollment: Members who prefer a digital experience may enroll directly through the SCAN Health Plan website at www.scanhealthplan.com.
- SCAN Electronic Enrollment: Through the SCAN Producer Portal, brokers can generate a personalized enrollment link (PURL) and send it to the member by text or email, allowing the member to complete the enrollment digitally.

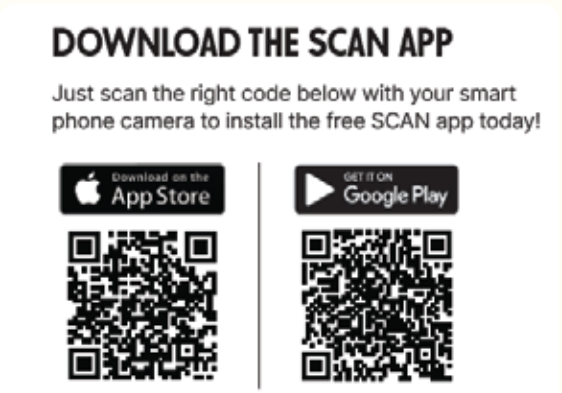
SCAN maintains its AOR Protection Policy. When an existing member changes plans, the original AOR remains protected, including when the member completes the enrollment digitally or is assisted by another broker, provided there is no gap in coverage.

What's Next for Your New Member

After your member's enrollment form is approved, here's what they'll receive:

> Verification letter
> Approval letter
> SCAN member ID card
> Quick Start Guide
> Welcome call
> SCAN Club newsletter
> Note that member can choose to recieve many of their SCAN materials electronically. Be sure they provide their email address on the enrollment form.





Under certain circumstances, they will also get a:

> Letter informing them how to get help with Medicare premiums (if they qualify)
> Health questionnaire
> Call to arrange for health services (if you filled out the Coordination of Care form when you enrolled the client)

* Check your specific plan benefits.

MARKETING

scan™

MARKETING STOREFRONT

Tools to Help You Sell

Materials You Can Order Online

SCAN provides all the sales materials you need to successfully sell our plans. You can order them online or download digital versions anytime.

To access these materials, visit the **Marketing Storefront** at **SCANProducerPortal.com**.

What Can Be Ordered on the Marketing Storefront?

- Enrollment Kits
- Benefit Highlights
- Brochures
- Flyers (Event andNon-Event)
- Postcards
- Provider Directories
- Formularies
- Dental Information
- Enrollment Forms
- Temporary ID Cards
- Lead Card
- C-SNP Pre-Enroll Assessment Form (Ansim Care, Balance, Strive, Walmart Medicare Complete)
- Continuity of Care Form
- C-SNP Permission to Send Health
- Information form
- Scope of Appointment Form
- Plan Rating Sheets
- OTC Catalog
- Drug Listing

MARKETING STOREFRONT

How to Order Materials

1. Select the state, county, and the materials you want to order.

2. Choose **Place Order**, review your selections and quantities, and confirm your shipping address. Then click **Complete Order**.

3. You'll receive an email confirmation once your order is placed, followed by a UPS tracking number when your materials ship. Please allow 2 business days for processing and 2-3 business days for delivery.

4. After placing your order, you'll have access to your **Digital Garage**, where you can download digital copies of the SCAN materials you ordered and use SCAN's searchable website tools.

Material Downloads

SCAN Sales materials are available for electronic download. You can easily package and email current, SCAN plan materials to your clients.

Digital Garage

Access to a personalized, customized microsite where you can store all the SCAN Sales and Marketing materials, plus a customized URL for easy access, and links to SCAN searchable tools.

SUBMITTING MARKETING MATERIALS FOR APPROVAL

The SCAN name, logo and MA promotional materials may only be used with express written consent.

If you would like to use the SCAN logo or any materials that promote SCAN products in print or on your website, you must submit a request to SCAN for our review prior to your use.

1. If the materials contain no benefit information or sales events, they will typically be reviewed and approved within two business days.

2. If your materials contain specific benefits and/or a list of sales events, they must be filed with CMS which typically requires five to seven days.

NOTE: You may not manipulate or alter any PDF's or artwork provided by SCAN. Also, you may not allow outside designers or distributors to edit SCAN materials.

Send your request to use the SCAN logo and materials to:
SCANMarketingSubmissions@SCANHealthPlan.com.

We will reply within two business days with our approval, a request for additional information or the time frame for CMS approval (which is dependent on your material's content).

Do not use or distribute these materials until you have received an approval email from SCAN. Websites must not state that you represent Medicare or any branch of the federal government.

TO ORDER CUSTOMIZED FLYERS FROM THE MARKETING STOREFRONT

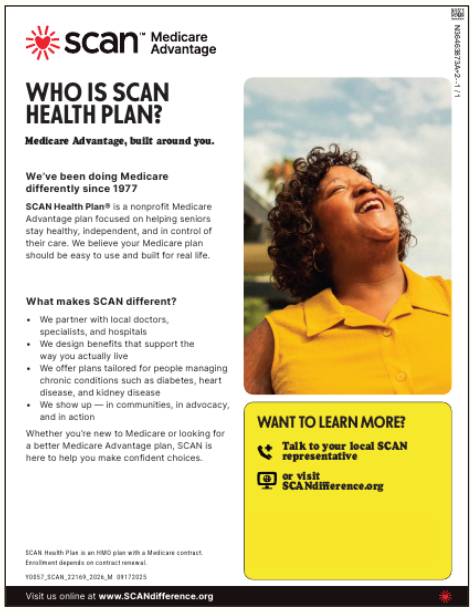
1. For Non-event flyers, select the State and County. Then select the preferred flyer.

2. For Event flyers, you must register your events with SCAN first. Once registered, events will be listed on the left side of the flyer preview screen. You may select between two to eight events per flyer depending on the flyer type.

3. Use the **"Update Preview"** button on the site to review and correct your customized flyer prior to ordering. Ensure that your license number is populated on the flyer preview.

4. Add a quantity to your cart, continue ordering or select "Place Order." Finally review materials and quantities, confirm shipping address, and click **"Click here to Complete Order."**

5. An email confirmation will be sent to you after your order is placed; a UPS tracking


scan™ Medicare Advantage

WHO IS SCAN HEALTH PLAN?

Medicare Advantage, built around you.

We've been doing Medicare differently since 1977

SCAN Health Plan® is a nonprofit Medicare Advantage plan focused on helping seniors stay healthy, independent, and in control of their care. We believe your Medicare plan should be easy to use and built for real life.

What makes SCAN different?

- We partner with local doctors, specialists, and hospitals
- We design benefits that support the way you actually live
- We offer plans tailored for people managing chronic conditions such as diabetes, heart disease, and kidney disease
- We show up — in communities, in advocacy, and in action

Whether you're new to Medicare or looking for a better Medicare Advantage plan, SCAN is here to help you make confident choices.

WANT TO LEARN MORE?

Talk to your local SCAN representative

or visit SCANdifference.org

SCAN Health Plan is an HMO plan with a Medicare contract. Enrollment depends on contract renewal.

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Visit us online at www.SCANdifference.org

MARKETING STOREFRONT FAQ'S

Why can't I access the Storefront?

There may be several reasons. Perhaps you are not yet entered into the system as a new Agent. Typically, it takes two to four days to gain access to the Storefront once you've become active to sell SCAN. Or you may be trying to access the site with an email address that is different from the one you registered with SCAN.

Contact the SCAN Sales Support Team for help at (888) 445-2038.

How do I add sales events to a flyer?

Your sales events must first be submitted by your agency contact to SCAN Seminar Submissions at **SeminarSubmission@SCANHealthPlan.com**. Events must be submitted at least ten business days in advance of the event. Once approved, the events will be uploaded to the Storefront for you to include on any event flyer layout.

PLEASE NOTE: Under no circumstances are you allowed to add events on blank flyer shells that have not been previously submitted to SCAN. You also may not manipulate or add any information to the flyers after they have been customized in the Storefront and delivered to you. Any changes that were not approved by CMS may result in your termination.

My information (name, mailing address, or phone) is incorrect and needs to be changed. How can I update or change my personal information?

Here are two ways:

1. You can update your information on the Storefront by clicking on the "Edit Profile" on the upper right-hand corner of the home page.

2. Contact the SCAN Sales Support Team and provide them with the correct information. It can be corrected in the system typically the same day or sooner.

Can I add my photo or more than one phone number to materials/flyers?

Yes, you may add your photo to your materials--just go to your Storefront account and edit your profile to include your photo. At this time, only one phone number is allowed per Storefront account.
What if I'm trying to order an item on the Storefront and it's out of stock or not available?
Please contact SCAN's Sales Support Team and let them know about the item you wish to order. They will contact SCAN Marketing and provide you with an estimate of when the item will be back in stock. We appreciate your patience.

Questions?

Contact the SCAN Sales Support Team for help at **(888) 445-2038.**

You may also contact your SCAN Broker Account Executive for questions or assistance.

GUIDELINES FOR PLANNING AND WORKING AN EVENT

ALL sales events must be submitted to SCAN. Our process requires that you work through your contracted broker agency who will submit events on your behalf.

DEFINITION	Any event that is advertised as Educational and does NOT include a sales presentation or other M&S activities.	ANY event that includes a sales presentation or M&S activities.
WHAT ARE M&S ACTIVITIES?	Giving any type of sales presentation. Handing out or mentioning plan-specific benefits info and advertising materials. Discussing premiums or copay amounts. Handing out or collecting applications.	
REPORT TO SCAN?	Not required. CMS may secret shop these events.	YES. CMS secret shops these events. All events must be submitted on the approved CMS template to SCAN (SeminarSubmission@SCANHealthPlan.com) for broker agents.
IMPORTANT TO NOTE	Advertisements must display this disclaimer: "This event is only for educational purposes and no plan-specific benefits or details will be shared."	All products to be discussed must be announced at the start of any formal presentation.
MEALS & GIFTS	Both are permitted: Up to a total of $15 per attendee (retail value). Promo items may have SCAN's name, website & toll-free number. All advertising and explanatory material promoting free gifts must include "There is no obligation to enroll" verbiage.	Light snacks only and no-obligation gifts permitted up to a total of $15 per attendee (retail value). Promo items may have SCAN's name, website & toll-free number. All advertising and explanatory material promoting free gifts must include "There is no obligation to enroll" verbiage.
HAND-OUTS	Any defined by CMS as Educational, but no plan-specific info or bias toward one plan type over another.	All plan brochures and pre-enrollment advertising materials including enrollment forms, Business Reply Cards, and lead cards. Scope of Appointment forms are required if subsequent meeting is requested. Additionally, a CMS-approved sales presentation is available for use at scan.cmpsystem.com
BUSINESS CARDS	Permitted ONLY on request. May not be attached to educational materials.	Permitted

YOUR SALES EVENT SUBMISSION PROCESS

Make sure you have exact information on the location of your event! SCAN Compliance Assessors must be able to locate you.

Work directly with your agency's designated coordinator who will process your Event Submission request. They will complete the "SCAN Broker Sales Event Template" and submit your request to **SeminarSubmission@SCANHealthPlan.com** 10 business days in advance of the event or the event's advertisement. NOTE: We are closed weekends and holidays.

Wait for SCAN's approval before marketing or conducting your sales event. Sales Operations will respond within two business days of receipt of your request. If accepted, you will receive a confirmation email. If rejected, your agency will be asked to make corrections and resubmit.

Now you are ready to advertise and/or conduct your sales event!

	EDUCATIONAL EVENTS	FORMAL & INFORMAL MARKETING & SALES (M&S) EVENTS
WHAT CAN I DO?	Host in a public venue. Include communication activities and distribute communication materials. Answer beneficiary-initiated questions. Hand out business cards and contact information to beneficiaries. Display a banner with SCAN's name and logo.	Accept applications, enroll beneficiaries, set up one-on-one sales appointments (requires an SOA), and request permission to call the attendee. Compare SCAN plans to other Plan/Part D sponsors (using statistical data). Use sign-in sheets that must be clearly labeled as "optional." If the event is informal, you must wait to be approached before discussing our products.
WHAT CAN'T I DO?	Include marketing or sales activities. Distribute marketing materials or enrollment forms. Discuss or distribute plan-specific benefits or materials. Set up a future marketing appointment. Effective 1/1/27: Agents are not allowed to distribute or collect SOAs during or directly following an, Educational Event. Educational and Marketing Events must be at least 12 hours apart on the same day or at the same location.	Conduct "cherry-picking" activities such as health screenings. Require attendees to provide contact information before or during the event. Use contact information collected for a raffle/drawing for ANY other purpose. Serve meals or provide gifts that may be turned into cash. Solicit enrollment prior to the start of AEP (October 15 - December 7).

SALES EVENT MODIFICATIONS AND CANCELLATIONS

In the event that you need to modify or cancel a scheduled sales event, notify your agency coordinator immediately.

To Cancel or Modify Your Submission

Communicate all cancellations and modifications to your agency coordinator no less than 72 hours prior to the scheduled date. SCAN will send an email confirmation of the cancellation/modification to your agency coordinator.

A. If cancelled within 48 hours of scheduled date:

- Post a sign stating that the event was cancelled and include notice of alternate event opportunities
- You must appear at the site at the scheduled time and stay 15 additional minutes, unless event was cancelled due to weather
- Advise attendees of the cancellation and possible alternate events
- Event cancellations must also be submitted to SCAN

B. If cancelled more than 48 hours prior to the scheduled date:

- Notify beneficiaries in the same way you advertised the event, (e.g., phone call, newspaper announcement)
- If unable to attest that you reached attendees, follow the method stated in A

C. If cancelled due to non-attendance, follow the method stated in A.

D. If beneficiary sent an RSVP, personally call them and advise of cancelled event.

- Ensure you have permission to call (PTC)

E. Keep documentation of your cancellation. Include the list of beneficiary names, phone numbers, and the date and time you notified them.

COMPLIANCE

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HOW TO STAY COMPLIANT

Follow SCAN's Code of Conduct

You are expected to:

- Represent SCAN honestly and accurately
- Act with integrity
- Treat others with respect
- Commit to report issues that could prevent or jeopardize SCAN's ability to be compliant or to otherwise do the right thing. SCAN maintains a strict policy of non-intimidation and non-retaliation for good faith actions.Commit to report issues that could prevent or jeopardizeSCAN's ability to be compliant or to otherwise do the right thing. SCAN maintains a strict policy of non-intimidation and non-retaliation for good faith actions.

Safeguard Plan and Member Information

It is our responsibility to maintain the security of both company and member information. SCAN's confidential and proprietary information, like our plans and strategies, is nonpublic. Our members' Protected Health Information(PHI) and Personal Information (PI) are highly sensitive and we have an obligation to protect it. Examples of this information: Member name, Social Security number, SCAN ID number, Telephone/Fax number, Addresses (including email) and Birth Date.

Report Fraud, Waste & Abuse (FWA)

Use the EthicsPoint website to anonymously report FWA or issues related to non-compliant, unethical or illegal activities. EthicsPoint Hotline: **(877) 863-3362 or www.ethicspoint.com**

When Reporting Online:
> Enter "SCAN" in the organization name field and click "Submit"
> Follow instructions to submit a report or to check the status of a previously filed issue

Medicare Name and Logo

You are prohibited from using the Medicare name, CMS logo, products or information issued by the Federal Government (including the Medicare card) in a misleading manner. CMS acknowledges that reasons may exist for using the Medicare card image, but it must be authorized by them.

CMS Telephonic Requirements

All agents must now record telephonic and web-based marketing or enrollment calls made to beneficiaries. Also, you need to read the following Third Party Marketing Organizations (TPMOs) Disclaimer in the first minute of the conversation. Keep in mind that all recordings must be made available upon request. (Service calls are not required.)

Effective 1/1/27: "We do not offer every plan available in your area. Currently we represent [insert number of organizations] organizations which offer [insert number of plans] products in your area. Please contact Medicare.gov or 1-800-MEDICARE to get information on all of your options."

BE PREPARED FOR PERFORMANCE AUDITS BY SCAN SALES INTEGRITY

As a SCAN sales agent, you are expected to conduct your sales and marketing efforts in an ethical and compliant manner. This includes complying with established performance standards for selling SCAN to beneficiaries. The purpose of SCAN's sales training program is to ensure you know what constitutes acceptable sales activities and performance in accordance with governing federal and state laws, and SCAN requirements.

SCAN's Sales Integrity Standards for all Agents and Brokers Include the Following Minimum Performance Levels:

> Achieving less than a 10% rate of rapid disenrollments, denials, or withdrawals for new enrollees with the plan
> No late enrollment application submissions
(submit applications to SCAN within 24 hours of beneficiary signature date)
> No deficiencies identified in Sales Integrity field assessments
> No deficiencies identified in CMS Secret Shopper assessments of sales events
> No outbound enrollment calls without documented permission to contact
(Telesales and telephonic brokers)
> Achieve 90% compliance with call script adherence (Telesales and telephonic brokers)
> No substantiated sales allegations
> No deficiencies identified in random broker enrollment audit
> No deficiencies identified in website reviews
> No deficiencies identified in broker advertisement reviews
> No deficiencies identified in Permission to Contact (POC) & Scope of Appointment (SOA) audits
> No deficiencies identified in contracting, licensing, appointment, and certification status assessments
> Attend all sales events filed with SCAN ("approved sales event") unless there is a valid exception
> All telephonic recordings are made available upon request

An unexcused failure to attend an approved sales event will result in a written warning. The second time an unexcused failure to attend an approved sales event occurs in a 12-month time period may result in termination from being able to sell SCAN to beneficiaries through any sales channel.

Failure to consistently meet SCAN's sales compliance standards and expectations will result in disciplinary action. The impact to beneficiaries resulting from non-compliant sales practices as well as prior precedent will be taken into account in determining appropriate disciplinary action. SCAN's progressive disciplinary action includes counseling, performance coaching, additional training, written warning, corrective action, last and final written warning, suspension, and termination.

Here are the components of a compliant Sales Presentation. If you do them all, you will be rewarded with a SCAN Sales Assessor score of 100%.

Things You Should ALWAYS Do

- Show up on time and be where you said you would be
- Clearly identify any sales event venue with signage
- If a sign-in sheet is used at a sales event, it must clearly state "Optional"
- State that you don't represent Medicare or any branch of the Federal Government
- Have Scope of Appointment (SOA) signed prior to beginning presentation (you must keep these forms for 10 years and provide a copy if requested). See that the beneficiary initials the box. (NO check marks)
- Discuss ONLY the products identified on the SOA
- Hand out only CMS-approved materials (carries a CMS code)
- Schedule appointments in Long Term Care facilities (upon beneficiaries request only)
- Conduct sales in common areas like cafeterias, conference or recreational rooms, and pharmacies(but away from counter and waiting areas)

Things You Should NEVER Do

- Not show up to your scheduled sales event that was filed with SCAN
- Approach beneficiaries in common areas
- Conduct door-to-door solicitation, including leaving information such as a leaflet or flyer at a residence or car
- Conduct unsolicited telephonic or electronic solicitation, including leaving electronic voicemail messages or text messaging
- Discuss any product NOT identified on the SOA
- Serve meals – snacks are OK
- Give gifts over $15 retail value
- Require attendees to provide contact information
- Use personal contact information obtained to notify individuals of raffle or drawing winnings for any other purpose
- Have a sign-in sheet that does not state "Optional" and/or insist that sales event attendees sign your sign-in sheet
- Insist that sales event attendees sign your sign-in sheet
- Make any absolute statements ("We are the best!")
- Use high-pressure tactics
- Make inaccurate statements
- Make disparaging remarks about the Federal Government or another MA organization
- Market or discuss the coming year's plans prior to October 1 or enroll a prospect before October 15th*
- Conduct any sales activities whatsoever in hospital patient rooms, waiting rooms, dialysis treatment areas, or at pharmacy counters
- Any marketing unless the names of MA organizations or Part D sponsors being advertised are clearly displayed
- Tell potential enrollees how much they could save by listing costs that Medicare beneficiaries haven't actually had to pay, or by comparing their costs to those of people who don't have insurance or haven't paid their medical bills.

**Compensation will not be paid and disciplinary action may occur for January 1st effectives, if SCAN receives the enrollment prior to October 15th with your Rep Code.*

Find all the new CMS Final Rule requirements at: https://www.federalregister.gov/documents/2026/04/06/2026-06600/medicare-program-contract-year-2027-and-certain-contract-year-2026-policy-and-technical-changes-to

THINGS YOU SHOULD ALWAYS EXPLAIN

> The Plan Star Rating and refer to www.medicare.gov for more info
> Where to find the Multi-Language insert
> Eligibility requirements
> Enrollment, disenrollment and lock-in periods
> Requirement to continue to pay Part B
> The Late Enrollment Penalty (LEP)
> Plan premiums, co-insurance & co-pays
> Possible higher costs or non-payment if a non-network provider is used
> Prior authorization/step therapy/ exception/transition process and quantity limits
> SNP's, eligibility, and the loss of coverage (disenrollment) criteria
> Where to find covered prescription drugs (formulary)
> The cost of covered prescription drugs
> That members must use network pharmacies
> How drug coverage works with SNP's
> The Referral Process
> Compensated for Enrollments
> Sign-In Sheets (Optional)
> New disclaimer
> Medicare Advantage is NOT a Medicare Supplement

Working in a Health Care Setting

Common Areas

Areas designated for agents to conduct sales activities, including sales presentations, the distribution of marketing materials, and the distribution and collection of enrollment forms.

- Common Entryways
- Vestibules
- Waiting Rooms
- Hospitals or Nursing Home Cafeterias
- Community, Recreation, or Conference Room

Restricted Areas

Areas designated where agents are NOT ALLOWED to sell or market. (I.e., sales activities, including sales presentations, the distribution of marketing materials, and the distribution and collection of enrollment forms.

- Exam Rooms
- Hospital Patient Rooms
- Treatment Areas (Where patients interact with a provider and his/her clinical team and receive treatment (including dialysis treatment facilities)
- Pharmacy Counter Areas (Where patients interact with pharmacy providers and obtain medications)

Things Health Care Providers May – and May Not – Do

Health Care Providers must remain neutral in MA enrollment decisions but may engage in discussion if asked for advice.

PROVIDERS - PERMITTED TO DO

- Provide plan names and marketing materials, as long as they do so for ALL their contracted plans
- Display posters and flyers in waiting rooms
- Provide information on LIS
- Offer information sources such as Plan marketing reps, Medicaid & Social Security office info, CMS website and Medicare 800 number
- Include materials in admissions packets (for Long-Term Care facilities) that advise of their plan contractual relationships

PROVIDERS - NOT PERMITTED TO DO

- Offer Scope of Appointments or accept enrollment forms
- Distribute plan materials or applications
- Mail marketing materials on behalf of plan
- Make phone calls or offer anything of value to persuade patients to enroll in a specific plan
- Accept compensation directly or indirectly from plan for enrollments
- Conduct health screenings as a marketing activity
- Provide patient information (i.e., patient lists)

COMMISSIONS

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SALES AGENT COMPENSATION

Compensation Policies and Procedures

To be eligible for payment, you must maintain a current state insurance license and complete your annual training certification. Please refer to the section **"COMMISSION ELIGIBILITY"** in the SCAN Broker Commission Guide for further details.

SCAN pays commissions:

> Only if an enrollment is completed by a broker who was already certified at the time of the enrollment. Additionally, the License and Contract Signature page for each individual state is required

> At the CMS maximum allowable rate based on the Medicare Advantage Prescription Drug (MARx) cycle year data.

> Twice a month so you get paid sooner!

- When SCAN receives your CMS-approved NEW Enrollments
  - By the 4th of the month, we'll issue payment on the 17th
  - By the 19th of the month, we'll issue payment on the 2nd of the following month
- Renewals for Prior Year Enrollments are always issued by the 2nd of the following month

> On Lifetime Renewals if you maintain a current state insurance license and complete your annual training certification. Your eligibility for receiving renewals is dictated by the product and rules of the plan.

> On a monthly basis for renewals (not upfront for the year). Renewal memberships start in January of the following year.

> In a lump sum at the CMS maximum allowable rate for members who are new to Medicare.

> At the CMS maximum allowable pro-rated amount for members who move from an existing MAPD or PDP plan.

> When an existing member changes plans with no gap in coverage, commissions remain with the original Agent of Record (AOR).

NOTE: Direct Deposit can be set up once you receive your first paper check. If an adjustment to compensation is necessary due to changes to MARx data, over/under payments are corrected when the member data is received from CMS.

If an agency fails to recertify annually, commission payments will stop to both the agency and their up-line.

Termed Agents and Agencies must recertify by 12/1/2025 to continue to receive renewals.

NATIONAL PRODUCER NUMBER (NPN) QUESTIONS?

Contact us at:
SalesCompensation@SCANHealthPlan.com or call (562) 637-1220

Change in Payee
When requesting changes to the payee name or Tax ID, you must complete a new electronic W-9. Send your “Payable to” change request to SCANBrokerContracting@SCANHealthPlan.com and an electronic W9 will be sent to you via email.

This will ensure the payments are issued accurately. The change will take effect on the first of the following month, provided that the request was submitted prior to the 15th of the current month. They can submit requests anytime, and can be processed for the 1st of the following month, as long as it's received back to contracting before the 30th. This change will not affect renewal payments and agents will continue to be paid according to the initial payout.

To update your contact profile, send an email with the revised information to SCANBrokerContracting@SCANHealthPlan.com

Questions about commissions? For any issues, email us at SalesCompensation@SCANHealthPlan.com
For complete information, review the SCAN Commission Guide.

SCAN AGENT SUCCESSOR PROGRAM

Good news for you as you plan for the future!

The SCAN Successor Agent program allows those who qualify to have the ability to transfer or sell your book of business to another SCAN contracted agent.

What is an Agent Successor?

A Successor Agent is defined as a qualified agent who will service the members in the book of business being transferred to them, in exchange for renewal commissions for the SCAN members in that book of business.

When does a Successor Agent agreement make sense?
> Exiting the business (e.g., retirement, illness, or sale of business).

SCAN will allow the Original Agent to transfer their book of business to another qualified SCAN sales agent who agrees to service the members in exchange for renewal commissions for that book of business.

Requirements:
> Agents transferring and receiving book of business must be in good standing according to SCAN's contracting requirements.
> Agents transferring and receiving book of business must be certified to receive renewal commissions with SCAN.
> Original Agent transferring book of business must be paid directly by SCAN.
> Original Agent cannot be on Assignment of Commissions (AOC) or have a history of being on Assignment of Commissions.
> Successor Agent must be paid directly by SCAN and cannot be on Assignment of Commissions (AOC)
> Agents must complete Successor Agent Transfer Form before any transfer will take place.
> Inform SCAN whether to keep on file for future use or if ready to transfer now.
> Agent must have at least 3 Active SCAN Members to request a Transfer of Book of Business.
> Agent acknowledges that after executing a transfer or sale of their Book of Business that they will no longer be allowed to sell SCAN plans and/or recontract with SCAN.
> Death of an agent. SCAN requires the Assignment Upon Death form to be completed prior to death.

DEATH OF AN AGENT

SCAN requires the Assignment Upon Death form to be completed prior to death.

Assignment Upon Death Form

Be prepared, plan ahead.

The SCAN Assignment Upon Death Form allows qualified agents to designate a SCANapproved Assignee to receive eligible renewal commissions.

WHO QUALIFIES AS A SCAN-APPROVED ASSIGNEE?
A SCAN-approved Assignee is a qualified agent who will provide services to those members in the book of business being transferred to them, in exchange for renewal commissions for the SCAN members in that book of business.

SCAN allows current SCAN Contracted Agents ("Assignor") who are actively receiving renewals to assign, upon their death, their book of business to another SCAN Contracted Agent ("Assignee") who agrees to service the members in exchange for renewal commissions for that book of business.

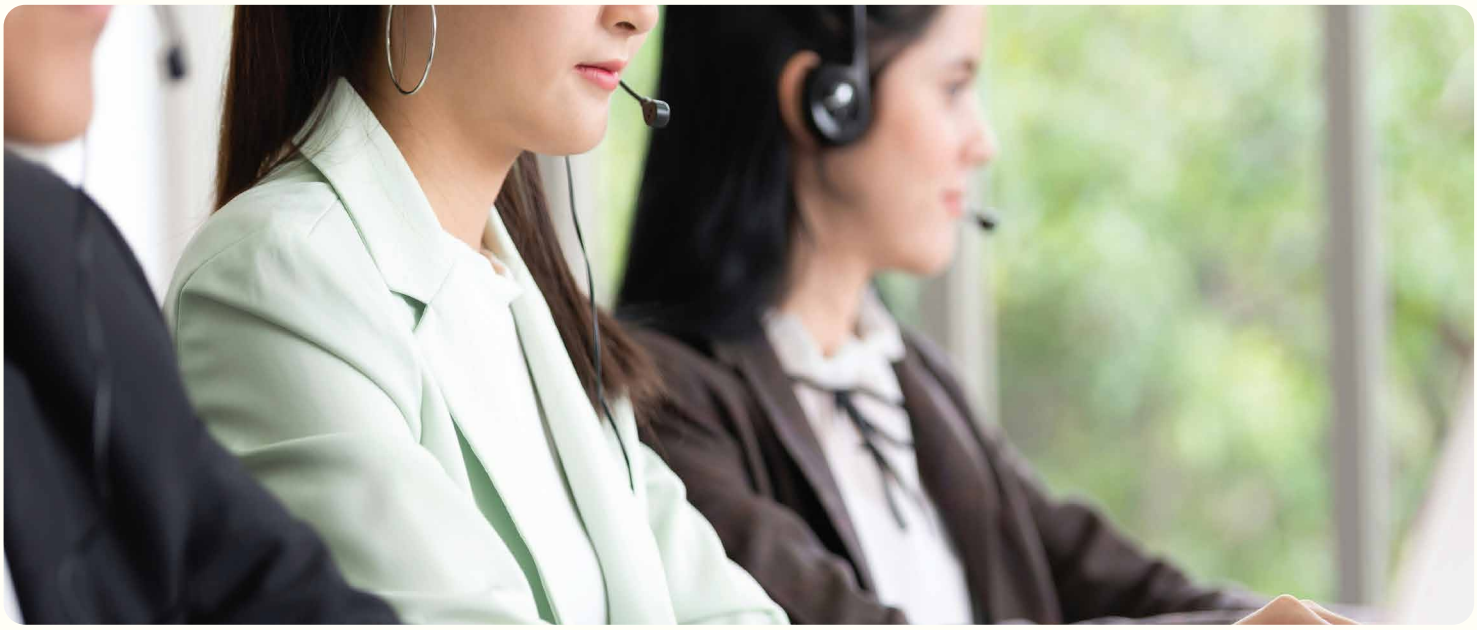
Any designated Assignee who is not an active and certified SCAN Contracted Agent will have 90 days to complete SCAN certification requirements upon the passing of the Assignor.

REQUIREMENTS:
> Assignor must be in good standing according to SCAN's contracting requirements both at the time of assignment and time of death.
> Assignor must be certified to receive renewal commissions with SCAN both at the time of assignment and time of death.
> Assignor must be paid directly by SCAN and cannot be on an Assignment of Commission (AOC).
> A SCAN Beneficiary Assignment Form or SCAN Successor Agreement MUST be on file with SCAN before the death of the Assignor.
> Assignee must notify SCAN within 90 days of the death of the Assignor and provide proof in the form of either an original death certificate or original published obituary. Photocopies will not be accepted.
> The Assignor must have at least 3 active SCAN members before a beneficiary form or transfer of commission will be processed. Commission Transfer will NOT be granted when an Assignor is only assigning renewals for 1-2 members at the time of their death.

Both forms can be found: https://www.scanproducerportal.com/commissions

Questions? Reach out to your local Broker Account Executive (BAE) or email: SalesCompensation@SCANHealthPlan.com

RESOURCES



Contracting
SCANBrokerContracting@scanhealthplan.com
(562) 989-5157

Event Submission
SeminarSubmission@scanhealthplan.com

Marketing Materials
SCANMarketingSubmissions@scanhealthplan.com

Training
SalesTraining@scanhealthplan.com

Sales Compliance
SalesIntegrity@scanhealthplan.com

Sales Support Team
SalesSupportTeam@scanhealthplan.com
(888) 445-2038

All Agency Questions?

Reach out to your local
Broker Account Executive

See page 51.

They are your Concierge Team.

They're in your neighborhood
and there to help.

QUICK SHEET

Member Services
1-800-559-3500 (TTY: 711)

April 1 to September 30
Monday through Friday
8 AM to 8 PM PT

October 1 to March 31
Monday through Sunday
8 AM to 8 PM PT

Messages received on holidays and outside of our business hours will be returned within one business day.

SCAN Health Plan

California	(800) 559-3500
Nevada	(855) 827-7226
Texas	(855) 844-7226
Arizona	(855) 650-7226
Washington	(833) 944-7226
New Mexico	(855) 826-7226

Sutter
(800) 749-9358

Korean Hotline
(855) KOR-SCAN or (855) 567-7226
Monday through Friday, 8 AM to 5 PM PT

Need to Look up a Doctor
www.scanhealthplan.com/en/find-a-doctor

Need to Look up a Medication
www.scanhealthplan.com/en/find-a-drug

Need to Look up a Pharmacy
www.scanhealthplan.com/findapharmacy

Need to Look up a Help Facility
https://www.scanhealthplan.com/en/find-a-health-facility

Paper Enrollments
Mail to: SCAN Headquarters
Enrollment, Reconciliation
& Premium Billing Department

12898 Towne Center Drive
Cerritos, CA 90703

Call Sales Support for Fax numbers

Telephonic Intent to Enroll Line
(855) 662-7226

SST advises that you have the member call Member Services for:

- Complex Member Issues
- Address Changes (may be requested through the producer portal)
- PCP/MG changes (may be requested through the producer portal)
- Pharmacy Issues - Sales Support Team (SST) can provide the BIN/GRP/PCN#
- Billing/Claims Issues
- Disenrollment issues - member received a letter/call from SCAN
- Transportation scheduling/issues

Here's a sample of the questions SST is most frequently asked:

Q: Will the Sales Support Team (SST) be able to answer my Commission questions?

A: Yes, SST is your main point of contact for commission questions. They will handle tier 1 commission support which includes: Pay date information; Help understanding your commission statement; & Setting up direct deposit. Further inquiries will result in an escalation to our commissions team and will be responded to within 24-48 hours.

Q: Can the SST help with member issues?

A: It is recommended to call member services for any member related concerns after their application has been processed / approved.

Q: Will the SST be able to speak to my client on the phone?

A: No. The SST is not allowed to speak directly to clients or members due to CMS regulations.

Q: My client is a SCAN member and I lost their phone contact information. Can the Sales Support Team give me the information?

A: Yes, the Sales Support team is able to provide ALL member information to current Agents of Record. Information includes, but is not limited to the Member's: ID number, Address, Phone number, PCP/MG,Plan name, Medi-cal Number and MBI Number.

Note:
Brokers can change address, PCP, and medical group through www.SCANProducerPortal.com

MEET OUR LEADERSHIP

STANTON SASAKI
VP National Broker Distribution Channel
ssasaki@scanhealthplan.com

QUINGAN ZHOU
VP Growth Strategy & Operations
q.zhou@scanhealthplan.com

ROB MILLHOLLIN
VP Internal Sales & Community Business Development
r.millhollin@scanhealthplan.com

MEET YOUR CLINICAL, EMO, AND DIRECT-TO-SCAN TEAM

NICHOLAS GASDIA
Sr. Director of Sales
ni.gasdia@scanhealthplan.com
(562) 972-2277

EDITH MONGE
Manager Employer Group Sales, EMO
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(562) 989-5106

ANDREW CHITTAPHONG
Project Manager, EMO
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(562) 554-3923

ALEX RODRIGUEZ
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(562) 989-5241

AUDRINA CARDENAS
Broker Account Executive, myPlace Health
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(562) 228-3690

MEET YOUR SOUTHERN CA SUPPORT TEAM

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Regional Sales Director - Southern CA
erapp@scanhealthplan.com
(310) 489-3154

ROBIN BARTLEY
Broker Account Executive - Inland Empire
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(562) 310-9529

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(310) 913-7446

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(714) 305-2710

ED MARTIN
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(818) 849-0096

MEET YOUR NORTHERN CA SUPPORT TEAM

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Regional Sales Director - Northern California
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(510) 820-5200

FRANKIE ROSS
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(510) 918-3947

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Broker Account Executive - San Francisco, San Mateo
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(415) 325-8804

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(916) 291-3581

RYAN SHERMAN
Broker Account Executive - Stanislaus, San Joaquin
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(209) 598-6067

DARALYNN KING
Broker Account Executive - Fresno, Madera, Kings, Tulare
d.king@scanhealthplan.com
(661) 303-7589

MEET YOUR ASIAN COMMUNITY + WASHINGTON SUPPORT TEAM

CONNIE TAM
Regional Sales Director - Asian Communities, WA
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(415) 891-5959

GARY CHUA
Broker Account Executive - Chinese Community
g.chua@scanhealthplan.com
(626) 566-4321

MAYA (DUNG) NGUYEN
Broker Account Executive - Vietnamese Community
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(714) 227-1424

SAM HAN
Broker Account Executive - Korean Community
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(213) 651-3842

LEONELL LADDS
Broker Account Executive - Pierce, Thurston
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(253) 649-3487

SANDY COOK
Broker Account Executive - Spokane
s.cook@scanhealthplan.com
(509) 218-2086

MEET YOUR TEXAS SUPPORT TEAM

JESUS ORTIZ
Regional Sales Director - Texas
j.ortiz@scanhealthplan.com
(214) 707-6260

ERIKA GOMEZ
Broker Account Executive - TX - Bexar
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(210) 897-6882

MINDI BELTRAN
Broker Account Executive - TX - Fort Bend, Harris, Montgomery
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MARIA GONZALES DE ORBEGOSO
Broker Account Executive - TX - Fort Bend, Harris, Montgomery
m.gonzalesdeorbegoso@scanhealthplan.com
(713) 248-0101

MEET YOUR NEVADA & ARIZONA SUPPORT TEAM

KELSEY HALL
Regional Sales Director - Arizona & Nevada
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MEGHAN ADAMS
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SCAN OFFICES

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12898 Towne Center Drive
Cerritos, CA 90703-8546
Main Line: (562) 989-5100

SCAN CENTRAL
1000 N Green Valley Parkway
#720
Henderson, NV 89074

ARIZONA REGIONAL OFFICE
4600 E. Washington St.
Ste. 300
Phoenix, AZ 85034

LEISURE WORLD
1661-C Golden Rain Rd,
Seal Beach, CA 90740

HOUSTON REGIONAL OFFICE
6575 West Loop South
Ste. 527
Bellaire, TX 77401

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