



Compliant Event Types

Educational Event



Educational events are designed to inform Medicare consumers about Original Medicare, Medicare Advantage (MA), Prescription Drug Plan (PDP), or other Medicare-related plans that do not include marketing.

The purpose of an educational event is to provide objective information about the Medicare program and/or health improvement and wellness. The plan sponsor or an outside entity may host an educational event.

COMPLIANCE RULES

Event not filed

Future appointments must not be scheduled and SOA forms must not be displayed or distributed

Scope of Appointment (SOA) must not be collected during Educational Events

BEST PRACTICES

Discuss the event in advance with your business consultant for additional guidance & topic ideas.



Marketing/Sales Event

Formal and Informal

Marketing/sales events are designed to steer or attempt to steer members or consumers toward a specific plan or a limited set of plans or for plan retention activities. Plan materials can only be distributed during eligible marketing periods and enrollment applications can only be collected during eligible election periods.

COMPLIANCE RULES

Must be filed no less than 7 calendar days prior to date of event for formal and informal not 1:1 appointments

Marketing events are prohibited from taking place within 12 hours of an educational event, in the same location (i.e., the entire building or adjacent buildings)

Change and cancellation request rules apply.

BEST PRACTICES

Allow 14 calendar days minimum before event for processing and issue resolution to meet 7-day requirement



Formal Event

Community Meetings (Online or In-Person)

Formal marketing/sales events typically structured in an audience/presenter style with an agent formally providing specific plan sponsor information via a presentation on the products being offered either online or in-person. In either setting, the agent usually presents to an audience that was previously invited to attend. Consumer materials for online meetings may be provided electronically if PTC allows for email use. If email is not allowed or available, materials may be mailed or provided in-person.

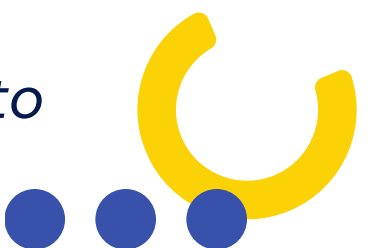
COMPLIANCE RULES

No enrollments can be conducted during online marketing/sales events.

An agent will need to schedule an in-person or over the phone 1:1 marketing appointment with consumer to complete a needs assessment, validate providers, validate medications, recommend a plan, and complete the enrollment.

BEST PRACTICES

Using MedicareCENTER for the 1:1 marketing appointment gives you an opportunity to review the benefit checklist and confirm provider, pharmacy & prescription details to find the "best fit plan."



Informal Event

Booth, Kiosk, RV or Table

Informal marketing/sales events are conducted with a less structured presentation and/or in a less formal environment and are intended for a passerby type of audience. The consumer is going to the location for another purpose such as a retail store and may see the kiosk or table and choose to approach the agent. They are typically manned by an agent who can discuss the merits of the plan's products.

COMPLIANCE RULES

Local markets determine what plans are featured on a shopping sheet (i.e., agent cannot pick and choose)

Each event must be reported separately with a start and end time

BEST PRACTICES

Shopping sheets are useful in markets where consumers have a choice and want a side-by-side comparison. MedicareCENTER also gives agents an easy way to conduct a comparison of 3 plans side-by-side.



Informal Event

Open Houses, Resource Centers, and Enrollment Centers

Informal marketing/sales events conducted in a more structured environment and consumers are driven via advertising to attend for the purpose of gaining assistance from the agent(s). May be staffed by multiple agents and is not a passerby audience.

COMPLIANCE RULES

Local markets determine what plans are featured on a shopping sheet (i.e., agent cannot pick and choose)

Each event must be reported separately with a start and end time

BEST PRACTICES

Shopping sheets are useful in markets where consumers have a choice and want a side-by-side comparison. MedicareCENTER also gives agents an easy way to conduct a comparison of 3 plans side-by-side.



Marketing/Sales Appointments

In-Person 1:1 Appointments

Typically take place in the Medicare consumer's residence; however, they may take place in other venues such as a coffee shop or over the phone. All individual appointments between an agent and a consumer/member are considered marketing/ sales appointment regardless of the content discussed.

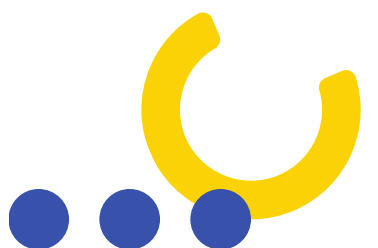
COMPLIANCE RULES

All personal/individual marketing appointments, in-person or online, whether or not an enrollment results, require a Scope of Appointment (SOA) agreement and all SOA guidelines apply

An SOA must be obtained at least 48-hours prior to the scheduled 1:1 marketing appointment

BEST PRACTICES

MedicareCENTER makes the SOA, quoting, and enrollment process simple, secure, and compliant.



Marketing/Sales Appointments

Online 1:1 Appointments

You are permitted to conduct on-line 1:1 (personal/individual) marketing appointments.

COMPLIANCE RULES

Ensure your virtual meeting service providers and other video chat devices or applications are secured with a password to join, or a unique link is created for the event

Agents are responsible for ensuring that a consumer's PHI/PII is protected and secure

An SOA must be obtained at least 48-hours prior to the scheduled 1:1 marketing appointment

BEST PRACTICES

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