



AN INTEGRITY COMPANY

Event Marketing Compliance Guidelines

Educational Events

Designed to inform beneficiaries about Medicare Advantage, Prescription Drug programs, and other Medicare programs, but does not include selling or marketing.

You may not discuss any specific plans or benefits, and you may not distribute any enrollment forms or marketing materials.

You are allowed to serve meals and provide nominal gifts under \$15 to all attendees.

vs.

Sales/Marketing Events

Group events that fall under the definition of sales/marketing:

Informal Sales Event

Offering plan information by request only while at a table, booth, kiosk, RV etc.

Formal Sales Event

Presenting plan-specific information and benefits to an audience. You must cover all required presentation points as outlined by each carrier you are presenting.

Permission to Contact

When can I collect it?



Educational Events



- Permission to contact/lead cards can be made available in a central area of the event and collected as filled out.
- You may draw attention to the location of the request cards, but you may not freely distribute them.
- You may not collect Scope of Appointment (SOA) forms or set future appointments at the event.















Sales Events







- Permission to contact/lead cards can be distributed to all attendees
- You may collect lead cards, scope of appointment forms, and set future appointments at the event.

NEXT











Reporting & Advertising	Educational Event	Sales/Marketing Events
Report event to Carriers/CMS		
Advertising the event	Must be advertised explicitly as "educational". Use disclaimers.	Must include applicable sales disclaimers below.
Disclaimers on advertisement	<i>This is an educational event only and no plan-specific benefits will be shared. For accommodations of persons with special needs, please contact [agent's phone number xxx-xxx-xxxx]. By calling this number you will be directed to a licensed agent.</i>	<i>For accommodations of persons with special needs, please contact [agent's phone number xxx-xxx-xxxx]. By calling this number you will be directed to a licensed agent.</i>

Distributed Materials	Educational Event	Sales/Marketing Events
Communication Materials		
Business Card		
Permission to Contact (PTC)/ Lead Cards	 Can be made available in a central location.	
Scope of Appointments (SOA) & Setting up Future Appointments		
Marketing Materials		
Plan Materials		
Enrollment Applications		

Food & Giveaways	Educational Event	Sales/Marketing Events
Meals (including whole pies)	 (\$15 limit, negotiated discounted rates do not apply)	 (\$15 limit, negotiated discounted rates do not apply)
Snacks	 Up to \$15 per person. Cost of any snack shall be combined with any giveaway cost, if applicable, and both costs must not exceed a \$15 nominal retail value.	 Up to \$15 per person. Cost of any snack shall be combined with any giveaway cost, if applicable, and both costs must not exceed a \$15 nominal retail value.
Giveaways	 Up to \$15 per person or \$75 per person aggregate for the year	 Up to \$15 per person or \$75 per person aggregate for the year

\$15 Limit Clarifications -

The \$15 is limited to the cost of the food and beverage and should include sales tax. Gratuity and any room fees or charges do not apply to the cost per person. Negotiated discounted rates do not apply. Any discounted rate used must be available to the public, like a Senior Discount.

Presented Topics	Educational Event	Sales/Marketing Events
Specific carrier/plans/benefits		 (at informal events - you must be asked)
Respond to a question about benefits when asked by a guest		
Respond beyond the scope of the question when asked by a guest		
Conduct health screenings		
Provider Guest Speaker/Partnership	Provider can discuss general health topics	Provider can discuss general health topics