

## Informal Marketing/Sales Events with an Introductory Presentation

Events are a great way to connect with consumers. The Centers for Medicare & Medicaid Services (CMS) allows two types of events:

- Educational
- Marketing/Sales (Note: educational content may be provided at a marketing/sales event)

As agents, you may conduct informal marketing/sales events that begin with an introductory presentation that contains educational content. This communication is designed to ensure that you report and conduct these types of informal marketing/sales events compliantly!

Below are guidelines for this type of event:

An agent may begin an informal marketing/sales event **with a short introduction, which may include:**

- An introduction of the agent, the carrier(s) the agent represents, and plan types (e.g., Medicare Advantage Plans, Prescription Drug Plans, and Medicare Supplement Insurance Plans) the agent is authorized to offer; the introduction should not include a presentation of a particular plan, including any plan benefits or costs
- Educational content such as Medicare eligibility requirements, election periods, Medicare insurance options and enrollment eligibility
- Educational content delivered by an external speaker (e.g., provider, pharmacist, American Cancer Society representative)

If the agent conducts an introductory presentation with educational content certain parameters must be followed, including but not limited to:

- Educational materials such as, UnitedHealthcare's "Medicare Made Clear" materials may be used. Agents can find these materials on the Agent Toolkit.
- **Agents must not present plan-specific** benefits and costs (e.g., premiums, copayments).
- **Agents must not attach personal plan/agent contact information** or business cards to educational materials.

**AFTER** the introductory presentation of educational information, the agent may use a table, booth, or kiosk to facilitate the consumer interaction. All rules related to conducting an informal marketing/sales event apply. Some rules related to conducting an informal marketing/sales event include:

- Light refreshments (e.g., cookies and coffee) may be offered, but meals must not be offered
- Promotional items may be offered. Note: Retail value of refreshments and promotional items must not exceed, in totality, more than \$15 per person
- The consumer **must** approach and engage the agent. The agent **must not** proactively engage the consumer.
- Marketing materials, including Enrollment Guides, plan benefit brochures, lead/business reply cards, invitations to future marketing/sales events, Scope of Appointment forms, and business cards, may be displayed and distributed.

Refer to Section 6 of the Agent Guide for additional rules related to informal marketing/sales events. Please note, health screenings are not allowed at marketing/sales events.

### **Reporting Informal Marketing/Sales Events that include an Introductory Presentation**

These events are considered informal marketing/sales events. Whether you report your events directly in bConnected or use the Event Request Form, report them as:

- Formal/Informal: **Informal**
- Event Type: **Resource Center\***

\* Note: Using "Resource Center" to report these events will enable UnitedHealthcare and its event evaluation vendor to identify informal marketing/sales events that may begin with an introductory presentation. (Continue to use event type "Kiosk" when a regular informal marketing/sales event will be conducted.)

**Remember**, marketing/sales events may include educational content. However, if any portion of an event will involve marketing to consumers or lead generation activities, the event **must be** reported and conducted as a marketing/sales event.

Do not confuse an educational event with educational content. According to CMS regulations and UnitedHealthcare policy, agents are **prohibited from conducting a marketing/sales event immediately following an educational event**. There must be at least one hour separating the conclusion of an educational events and the beginning of a marketing/sales event.

### **Advertising Informal Marketing/Sales Events**

**If advertised**, this event format **must** be promoted as a marketing/sales event (**not** as an educational event) with all applicable disclaimers included (e.g., "A sales person will be present with information and applications.") Materials to market informal marketing/sales events will be available on the Agent Toolkit – watch for more communication.

### **Contact**

Submit questions related to reporting or conducting marketing/sales events to [Compliance\\_Questions@uhc.com](mailto:Compliance_Questions@uhc.com).