



**Agent Pipeline**  
AN INTEGRITY COMPANY

# GUIDE TO **EVENT REGISTRATION** FOR INSURANCE AGENTS

# GUIDE TO EVENT REGISTRATION



## *Sales Events and Educational Events*

Hosting an event is a great way to establish yourself in your community; however, there is more to hosting your event than selecting your venue and presentation. The first step is to determine which type of event is right for you – a sales event or an educational event. Regardless of the event you choose, you must adhere to all CMS and carrier guidelines.

## *Structuring the Event*

There are two types of events – sales and educational events, and CMS treats each event differently. The kind of event you are having determines how you advertise the event and what you can do at the event.

An educational event is designed to educate attendees on the Medicare program and their options for coverage but cannot include any marketing or sales activities. You may, however, answer beneficiary-initiated questions and schedule future sales appointments.

At sales events, you can conduct marketing activities. You may discuss plan details such as premiums and benefits and enroll beneficiaries into a plan. Presentations must be CMS-approved, but most carriers have pre-approved options for agent use. While you may display a sign-in sheet, it must be labeled as optional.

## *Advertising the Event*

CMS requires that educational events be advertised explicitly as educational. All advertising and invitations to both sales events and educational events must include, verbatim, the following disclaimer:

**"For accommodations of persons with special needs at meetings,  
call <insert phone and TTY number>."**

## *Event Compliance*

CMS provides sales and educational events guidelines, and you must remain compliant with your actions. It is your responsibility to understand the difference between the event types and what event activities you can do at each. Both types of events will be subject to secret shoppers, so it's essential to stay within the parameters of your event. While the Medicare Communications and Marketing Guidelines give a detailed look at what can and cannot be done, the chart on the next page can help you get started.

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Event Activity	Sales Event	Educational Event
Report event according to carrier policy	Required	Required
Cancel event according to carrier policy	Required	Required
Use a public venue to hold the event	Required	Required
Advertise the event as educational	No	Required
Use CMS required disclaimers on all advertising	Required	Required
Display a sign-in sheet that is clearly labeled as optional	Yes	Yes
Conduct health screenings	No	No
Have a guest speaker discuss general health topics	Yes	Yes
Provide meals	No	Yes
Provide snacks	Yes	Yes
Offer gifts or prizes that can be converted to cash	No	No
Offer gifts or prizes containing agent or plan contact info	Yes	Yes
Accept or request referrals	No	No
Conduct lead generating activities	Yes	Yes
Accept business reply cards	Yes	Yes
Distribute business cards to attendees	Yes	Yes
Discuss plan specific details and information	Yes	No
Distribute marketing materials including applications	Yes	No
Collect enrollments applications	Yes	No
Schedule appointments with attendees	Yes	Yes
Obtain a scope of appointment form for scheduled appointments	Yes	Yes
Obtain event specific permission to contact	Yes	Yes

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## *Event Registration*

All sales events must be registered with your appointed carriers; however, not all carriers require the registration of educational events. Each carrier has its own process and timeline for event submissions that must be followed. The following are registration guidelines for some of our carriers.

### **UnitedHealthcare**

Access to a new Sales Event Reporting Form is on Welcome to Jarvis. It is non-compliant to conduct an unreported marketing/sales event.

#### *What type of events need to be reported:*

Sales

#### *Submission Deadlines:*

All events must be received into UHC's event reporting application and no less than seven calendar days before the date of the event.

### **Aetna**

If you're a licensed agent within an Aetna local market, submit your events directly to your market. Contact your local Aetna Medicare broker manager to get the appropriate Seminar Reporting Template. Templates vary slightly by market. To find your local broker manager, go to Aetna's Producer World. If you're a licensed Part D agent NOT within an Aetna local market, submit your seminar events directly to Agent Oversight's [medicaresemi@aetna.com](mailto:medicaresemi@aetna.com) mailbox.

Include agent name, NPN, Agent's phone number, date of the event. For virtual events, use the Aetna Medicare seminar reporting template, and in the address column, provide the URL, call-in number, and meeting codes for the event.

#### *What type of events need to be reported:*

Sales and Educational

#### *Submission Deadlines:*

Before advertising or ten calendar days before the event, whichever is earlier.

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## Cigna

Submit marketing/sales event information to your Cigna manager/broker sales representative (BSR). In addition, ONLY for formal sales presentations: Complete the Sales Event Form and submit each Monday before 9:00 AM for the previous week's events. Email the SEF to: [SalesEvents@healthspring.com](mailto:SalesEvents@healthspring.com).

Sales Event Log Templates and the Sales Event Form are available from the Cigna manager/BSR. Cigna employed agents must contact their manager.

### *What type of events need to be reported:*

Sales

### *Submission Deadlines:*

Only Cigna employed agents are required to report educational events. Submit the Sales Event Log Template before the 15th of the month for the following month's events. If the event is submitted to Cigna after the 15th of the prior month, the event is logged in the Sales Event Master Log at least ten calendar days before the event.

## Humana

### *Reporting template and email address:*

Agents must report all sales/marketing and educational events to the Sales and Marketing Support Executive (SMSE).

### *What type of events need to be reported:*

Sales and Educational

### *Submission Deadlines:*

All formal Sales events must be reported at least 21 days before the event date. For all informal marketing and educational events, report to SMSE at least seven days before the event date.

## Anthem

### *Reporting template and email address:*

Use an online event reporting tool.

### *What type of events need to be reported:*

Sales and educational

### *Submission Deadlines:*

Before advertising or ten calendar days before the event, whichever is earlier.

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## SilverScript

Submit your seminar events directly to Agent Oversight's [medicaresemi@aetna.com](mailto:medicaresemi@aetna.com) mailbox. Include agent name, NPN, Agent's phone number, date of the event. For virtual events, use the Aetna Medicare seminar reporting template, and in the address, the column provides the URL, call-in number, and meeting codes for the event.

### *What type of events need to be reported:*

Sales and Educational

### *Submission Deadlines:*

Before advertising or ten calendar days before the event, whichever is earlier.

## Mutual of Omaha

Email completed form to Debi Burrell-Thiem [Debi.Burrell-Thiem@mutualofomaha.com](mailto:Debi.Burrell-Thiem@mutualofomaha.com)

### *What type of events need to be reported:*

Sales

### *Submission Deadlines:*

At least one week before the event.

## Wellcare

Required to report the event in Salesforce, and an event request form must be completed and submitted to your Wellcare sales office for approval.

### *What type of events need to be reported:*

Sales and Educational

### *Submission Deadlines:*

For Sales events, lead/approval time for advertising: at least ten days for non-advertised events; 30 days for direct mail, and 16 days for print.