Educational event checklist for agents

This checklist is designed to help Medicare sales agents plan and execute compliant educational events by providing a clear timeline for preparation, execution and follow-up. Educational events are intended to inform beneficiaries about Medicare programs in a neutral, non-sales setting. **To stay compliant with CMS guidelines, keep the following in mind:**

- Must: Clearly label the event as educational, use public venues and include required disclaimers in all materials.
- Must Not: Discuss plan-specific benefits, distribute marketing materials, collect Scope of Appointment forms or schedule future marketing meetings.
- May: Answer general questions, provide educational materials and offer light snacks, a small meal or giveaways (under $15).

Important: Agents must be licensed and certified before conducting any sales or educational events. This includes completing the Events Basics module available on the Certifications Page in ***Learning Lab***.

Additional guidance can be found in the ***Agent Guide*** on Jarvis, in the Events Basics study guide and through the ***"Conducting Successful Events" webinar***. There are other event-related resources in Learning Lab as well.

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6 Weeks Before the Event

Confirm event dates, time, and purpose

- Confirm venue booking and accessibility for consumers
- Ensure the event is open to all consumers and free of charge

Reminder: If the educational event is held within a larger event (e.g., a community expo or state fair), it is acceptable for attendees to pay a general admission or "gate fee" to enter the larger event, as long as your specific session remains free.

Order Materials and Supplies from the UHC Agent Toolkit

- Order/download approved and compliant event materials
  - Medicare Made Clear Presentation
  - Medicare Made Clear Guides
  - Meeting Invitation/Postcard
  - Meeting Flyer
  - Sign-in Sheets and Lead Cards
  - Meeting Signage
  - Business cards
  - Name tags
- Ensure all materials are for the applicable plan year and clearly state the event is for educational purposes only

  Reminder: Any material promoting an educational event must include a disclaimer that the event is for educational purposes only. Without this, the event may be considered a marketing/sales event and subject to additional CMS rules.
- Order giveaway supplies, which in combination with any refreshment items, must not exceed $15 on a per person basis

  Reminder: Giveaways cannot include cash, gift cards, or other unapproved items and cannot exceed $15 per person, including the retail value of refreshments.

Event Promotion and outreach

- Post Meeting Invites on social media (if applicable)

  Reminder: Only use pre-approved content from the UHC Agent Toolkit when posting on social media. Do not create your own posts that include any UnitedHealthcare branding, such as the name or logo. For full guidance, refer to the "Agent Created Websites and Social Media Guidelines" job aid available on Jarvis.
- Invite your Market Growth Manager
- Clearly state that giveaways are available with no obligation to enroll

4 Weeks Before the Event

Venue and Logistics

- Confirm venue booking and accessibility for consumers
- Confirm audio-visual (AV) needs and venue point of contact
- Arrange for any necessary accommodations
- Note any needs for directional signage and ask the venue contact if prior approval is required to display
- Confirm seating is available, as well as tables if needed

Call Campaign

- Call current members and invite them to the event and encourage them to invite their friends or bring a friend with them to the event

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3 Weeks Before the Event

Refreshments and Giveaways

- Plan for light snacks/beverages (if allowed by the venue). A meal may be served at educational events

  Reminder: Meal cannot exceed the $15 nominal value threshold
- Ensure giveaways do not include cash, gift cards, or other unapproved items and do not exceed $15 per person, including the retail value of refreshments

Send Invites/Distribute Flyers

- Create an "event" on Facebook or other platforms to inform prospects of upcoming meeting details
- Confirm flyers are prepared and begin gathering a list of places to post flyers

  Reminder: You may reference the Agent Website and Social Media Guidelines Job Aid found in Jarvis for more guidance.

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2 Weeks Before the Event

Event Promotion

- Promote the event through approved channels
- Post flyers in the local community and at/near the venue
- Submit your event details to community-based or local event listing websites that offer free calendar postings
- Advise venue personnel of your event so they can direct consumers

1 Week Before the Event

- [ ] **Final Preparations**
  - [ ] Confirm all logistics, including venue details (timing, location, refreshments, seating, etc.) and online event platform (if applicable)
  - [ ] Confirm arrival time and location to connect with venue contact
  - [ ] Ensure all materials and supplies are ready and compliant
  - [ ] Review presentation and rehearse speaking points (consider printing copies for all attendees)
  - [ ] Mail reminders to guests
  - [ ] Boost posts or post new event reminders on social media
- [ ] **Consumer Contact Information**
  - [ ] Prepare approved sign-in sheets and lead cards
- [ ] **Guest Participants**
  - [ ] Remind Market Growth Manager of the event

Day of the Event

- [ ] **Event Execution**
  - [ ] Arrive Early (at least 60 minutes)
    - [ ] Meet with venue contact and AV support
    - [ ] Confirm seating arrangements
    - [ ] Click through presentation and confirm AV is functioning properly
    - [ ] Review speaking points
    - [ ] Confirm refreshments are staged (if applicable)
    - [ ] Set up directional signage
    - [ ] Set out any giveaways and handouts
    - [ ] Prepare name tags and sign in sheet
    - [ ] Get water, use the restroom, and get ready to greet consumers
  - [ ] Start the event on time
  - [ ] For informal events, be present for the entire promoted time and post signage if you momentarily step away
  - [ ] Remember to leave time for Q & A
  - [ ] Ensure any item containing consumer PHI/PII is secure

Post-Event

Follow-Up

- [ ] Review the event's success and note any areas for improvement
- [ ] Submit any feedback and/or required reports to UnitedHealthcare
- [ ] Securely store any consumer contact information collected
- [ ] Send follow up thank you emails to those who provided their emails
- [ ] Follow up on lead cards

For Medicare education resources to support your conversations, search "MMC" in the Agent Toolkit or visit ***MedicareMadeClear.com***.

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