

## Guidance Comparison Between Marketing/Sales and Educational Events

The purpose of this document is to provide a reference summary of key event guidelines, highlighting the difference between Education and Marketing/Sales Events. Use it to ensure you are scheduling and conducting the appropriate event type. The list of guidelines is not exhaustive and additional information about the parameters of what is required and allowed for each activity can be found in the most current agent guides or compliance guidelines. Guidance is subject to change. Effective September 2018

Marketing Guidance	Marketing/Sales Event	Educational Event
Report and/or cancel event according to carrier policy	Required	Required
Host the event at a public venue	Required	Required
Advertise as an Educational Event	Not Allowed	Required
Include disclaimer(s) on event advertising	Required	Required
Expect secret shoppers	Allowed	Allowed
Invite a provider to speak on general health topics	Allowed	Allowed
Conduct health screening or genetic testing	Not Allowed	Not Allowed
Provide meals (Maximum \$15 combined nominal retail value)	Not Allowed	Allowed
Serve light snacks/refreshment within combined \$15 nominal value. *No snack or refreshments allowed at Venue Management kiosks.	Allowed *	Allowed
Provide gift cards, gift certificates, or cash giveaways	Not Allowed	Not Allowed
Provide giveaways with agent contact information	Allowed	Allowed
Provide plan giveaways containing logo, toll-free number and/or carrier website	Allowed	Allowed
Conduct lead generating activities	Allowed	Allowed
Request or accept a referral	Not Allowed	Not Allowed
Post an approved carrier sign-in sheet, labeled "Optional"	Allowed	Allowed
Collect or accept lead cards/business reply cards	Allowed	Allowed
Attach a business card to materials with a single staple or piece of tape. *Note, at Educational Events, only educational materials may be distributed.	Allowed	Allowed *
Provide a business card if consumer requests one	Allowed	Allowed
Provide a business card to attendees, regardless if asked	Allowed	Allowed
Discuss specific carrier plans/products/benefits	Allowed	Not Allowed
Respond beyond a specific question a consumer asks	Allowed	Not Allowed
Provide educational materials on health care topics	Allowed	Allowed
Distribute plan materials	Allowed	Not Allowed
Distribute or collect enrollment Applications	Allowed	Not Allowed
Schedule a follow-up in-home or one-on-one appointment with consumer	Allowed	Allowed
Obtain compliant Permission to Contact that is method-specific and event-specific	Allowed	Allowed
Obtain a Scope of Appointment for a future appointment	Allowed	Allowed