

Medicare Advantage: Sales

Do

- Submit all formal and informal sales events so they can be reported to CMS in accordance to Plan policy
- Notify beneficiaries of an event cancellation by the same means that was used to advertise the event if you cancelled an event more than 48 hours before the scheduled date and time
- Return a beneficiary's phone calls or messages as these are not unsolicited
- Obtain a Scope of Appointment (SOA) for existing clients/members as well as new members if the beneficiary is interested in changing plans
- Keep all SOA documentation for at least 10 years, plus the current year
- Ensure all required documents are provided in the enrollment kit and discussed during a marketing event
- Announce all plan types that will be covered during the presentation (e.g., CareSource Advantage HMO and CareSource Advantage Plus HMO)
- Verbally discuss prescription drug benefit information, including copayments, coinsurance, costs, coverage gap or "donut hole," and formulary
- Respond to questions asked at an educational event within the scope of the question
- Provide her/his contact information (i.e. business card) if an individual would like to refer a friend or relative to the representative

Don't

- Use qualified or absolute superlatives
- Hold applications any longer than 24 hours
- Fail to modify and/or appropriately cancel a sales event in accordance with Plan policy (at least 48 hours or more in advance)
- Conduct a Sales event that has not been reported to CMS
- Provide or otherwise subsidize meals during a marketing/sales event
- Require the completion of or pressure event attendees to fill out a sign-in sheet or business reply card
- Offer a gift over \$15 based on the retail value of the item
- Use old lists or old consent forms to contact beneficiaries
- Begin discussing MA or PDP plans prior to the beneficiary signing the SOA form
- Contact or follow up with an individual if that person comments, likes or follows you on social media; this does not constitute agreement to receive any communication outside of the public forum