Educational Event Checklist



Before Event	Day of and During Event	After Event
☐ Secure venue for your event. ☐ Market your event prominently as an "Educational Event". ☐ Obtain a compliant Medicare 101 Presentation. ☐ Practice the presentation so you have a conversation with attendees and don't read from the slides. ☐ Order any handouts or promotional materials (cannot include 'marketing' content). ☐ Collect RSVP, call to confirm 1 day prior to event.	☐ Prepare your presentation by testing the technology being used on-site. ☐ Make sure the room is set up to your liking, i.e., tables & chairs. ☐ Set out all promotional materials and handouts. ☐ Stay compliant during presentation and with interactions with beneficiaries. ☐ Make available Permission to Contact (PTC) forms/BRCs. » Beginning 10/1/2026: SOAs can be made available and collected at educational events. ☐ Work the room before and after presentation. ☐ If you are offering a meal, have it served after your presentation so you can talk with the attendees. Note that the value for each individual meal cannot be more than $15.	☐ Set aside time to call all who filled out PTC to obtain a Scope of Appointment (SOA) if one was not collected at the event. Ensure you follow CMS guidelines applicable to the given plan year for completion of the SOA. ☐ Send out a thank-you card with a business card attached. ☐ Be certain to follow up on any beneficiary requests for additional information, provided that you have obtained the proper Permission to Contact (PTC).

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Compliance

Do's

- Use sign-in sheets that clearly indicate providing contact information is optional.
- Provide meals or refreshments with light snacks. (Max $15 combined nominal retail value; when combined with any other gift, must not exceed $15 on a per person basis).
- Invite a provider to speak at the event.
- Make available lead cards and business reply cards.
    - » Beginning 10/1/2026: SOAs can be made available and collected.
- Hand out your business card.
- Call attendees after the event has concluded, as long as they give you written permission at the event.
- Obtain compliant Permission to Contact that is method-specific and event-specific.
- Collect RSVPs with a compliant disclaimer: "Your RSVP acknowledges that we may contact you before the seminar to confirm your attendance."
- Educational event advertisements and invitations must prominently state that the event is EDUCATIONAL and also contain the following disclaimers:
    - » "For accommodations of persons with special needs at meetings call [insert phone and TTY number]."
    - » "This event is only for educational purposes and no plan-specific benefits or details will be shared."

Don'ts

- Discuss specific benefits, premiums or rankings.
- Distribute plan marketing materials.
- Provide or collect enrollment forms.
- Discuss or cross-sell products that are non-health care related (e.g., annuities, life insurance).
- Use RSVP contact information provided by attendees for any other purpose.
- Give away cash, gift cards or other monetary rebates.
- Respond beyond a specific question a consumer asks.

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What if You Have to Cancel Your Event?

First, you should avoid canceling an event at all costs, but we know some things may be out of your control. If you have to cancel an event, ***there are best practices you should be aware of.***

- You should strive to give your attendees at least 48 hours' notice of the cancellation.
- Notify your carrier(s) and your upline as early as possible.
- Notify the venue. Some venues may have specific cancellation policies. (Ask about those policies when you book your event.)
- Contact your attendees in the same way you contacted them initially, if possible, to let them know of the cancellation. If you can't do so, your carriers may require an explanation of why you could not do that.

If you cannot provide at least 48 hours' notice of cancellation:

- Notify your carrier(s) and your upline as early as possible.
- Notify the venue. Some venues may have specific cancellation policies. (Ask about those policies when you book your event.)
- ***Be present or have a rep present at the venue*** at the original event start time and provide relevant educational information. Depending on the circumstances, you or your rep may need to remain there until at least 30 min. after the original start time.

Remember, both CMS and your carriers will sometimes send out "secret shoppers" to your event, to see if you are in compliance with Medicare regulations. As long as you plan it properly and review the regulations involved, you should have no problems.

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