

Event Types Overview

EVENT TYPE	DESCRIPTION	COMPLIANCE RULES (see Agent Guide for ALL compliance rules) <small>Event Basics Certification must be completed before the event can be reported.</small>	SUGGESTED MATERIALS (SM) and RESOURCES (R)	LOCATION	BEST PRACTICES
Educational Event	Educational events are designed to inform Medicare consumers about Original Medicare, Medicare Advantage (MA), Prescription Drug Plan (PDP), or other Medicare-related plans that do not include marketing. The purpose of an educational event is to provide objective information about the Medicare program and/or health improvement and wellness. The plan sponsor or an outside entity may host an educational event.	Event not filed Clarity Guide/presentation and videos with plan details must not be used	Medicare Made Clear (SM) Agent Guide (R)	Jarvis/Sales & Marketing/Sales Materials/UnitedHealthcare Toolkit Jarvis/Knowledge Center/Guides	Discuss the event in advance with your sales leader for additional guidance.
Marketing/Sales Events: <ul style="list-style-type: none"> • Formal • Informal 	Marketing/sales events are designed to steer or attempt to steer members or consumers toward a specific plan or a limited set of plans or for plan retention activities. Plan materials can only be distributed during eligible marketing periods and enrollment applications can only be collected during eligible election periods.	Must be filed no less than 7 calendar days prior to date of event for formal and informal not 1:1 appointments. Change and cancellation request rules apply. Enrollment Guide is not required to be given to attendees unless the consumer requests one or enrolls in a plan. SOA rules do not apply to formal or informal events.	Agent Guide (R) New Event form (R) Change Event form (R) Cancel Event form (R) Agent Marketing/Sales Event Checklist (R) MA Virtual Meeting Flyer (SM) MA Virtual Visits Member Flyer (SM) Clarity Guide (SM) Product Positioning Sheets (SM)	Jarvis/Knowledge Center/Guides Learning Lab/Content Library/ Conducting Your Event or Jarvis/Sales & Marketing/Meeting Resources/ Events Jarvis/Sales & Marketing /Sales Materials/UnitedHealthcare Toolkit Jarvis/Sales & Marketing/Sales Materials/UnitedHealthcare Toolkit Jarvis/Knowledge Center/Product Overview (MA, Part. D for DSNP) (scroll down, select region/state)	Allow 14 calendar days minimum before event for processing and issue resolution to meet 7-day requirement.

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Formal (Community Meetings online or in-person)	Typically structured in an audience/presenter style with an agent formally providing specific plan sponsor information via a presentation on the products being offered either <i>online or in-person</i> . In either setting, the agent usually presents to an audience that was previously invited to attend. Consumer materials for online meetings may be provided electronically if PTC allows for email use. If email is not allowed or available, materials may be mailed or provided in-person.	<p><i>No enrollments</i> can be conducted during on-line marketing/sales events. Agent will need to schedule an in-person or over the phone 1:1 marketing appointment with consumer to complete:</p> <ul style="list-style-type: none"> • needs assessment • validate providers • validate medications • recommend a plan • and complete enrollment 	Agent Guide (R) Clarity Guide (SM) Benefit Highlights or Summary of Benefits to focus on plan benefits (SM) Product Positioning Sheets (SM)	Jarvis/Knowledge Center/Guides Jarvis/Sales & Marketing/Sales Materials/UnitedHealthcare Toolkit Jarvis/Sales and Marketing/Sales Material Portal <ul style="list-style-type: none"> • Summary of Benefits (Enrollment Guide) • Evidence of Coverage Jarvis/Knowledge Center/Product Overview (MA, Part. D for DSNP) (scroll down, select region/state)	Benefit Highlights is a one-page document.
Informal (i.e. booth, kiosk, RV or table)	<p>Informal marketing/sales events are conducted with a less structured presentation and/or in a less formal environment and are intended for a passerby type of audience. The consumer is going to the location for another purpose such as a retail store and may see the kiosk or table and choose to approach the agent.</p> <p>They are typically manned by an agent who can discuss the merits of the plan's products.</p>	<p>Local markets determine what plans are featured on a shopping sheet (i.e., agent cannot pick and choose).</p> <p>Each event must be reported separately with a start and end time.</p>	Agent Guide (R) Shopping Sheets (SM) Clarity Guide (SM) Plan Search (R) (side by side comparisons)	Jarvis/Knowledge Center/Guides Jarvis/Sales & Marketing/Sales Materials/UnitedHealthcare Toolkit Jarvis/Sales & Marketing/Sales Material/ UnitedHealthcare Toolkit Jarvis/Tools/Plan Search	Shopping sheets are good in markets where consumers have a choice and want a side-by-side comparison.

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Informal (i.e. Open Houses, Resource Centers and Enrollment Centers)	<p>Informal marketing/sales events conducted in a more structured environment and consumers are driven via advertising to attend for the purpose of engaging the agent(s).</p> <p>May be staffed by multiple agents and is not a passerby audience.</p>	<p>Local markets determine what plans are featured on a shopping sheet (i.e. agent cannot pick and choose).</p> <p>Each event must be reported separately with a start and end time.</p>	<p>Agent Guide (R)</p> <p>Shopping Sheets (SM)</p> <p>Clarity Guide (SM)</p> <p>Plan Search (R) (side by side comparisons)</p>	<p>Jarvis/Knowledge Center/ Guides</p> <p>Jarvis/Sales & Marketing/Sales Materials/UnitedHealthcare Toolkit</p> <p>Jarvis/Sales & Marketing/Sales Material/ UnitedHealthcare Toolkit</p> <p>Jarvis/Tools/Plan Search</p>	<p>Shopping sheets are good in markets where consumers have a choice and want a side-by-side comparison.</p>
Marketing/Sales Appointments In-person 1:1 appointments	<p>Typically take place in the Medicare consumer's residence; however, they may take place in other venues such as a coffee shop or over the phone. All individual appointments between an agent and a consumer/member are considered marketing/sales appointment regardless of the content discussed.</p>	<p>All personal/individual marketing appointments, in-person or online, whether or not an enrollment results, require a Scope of Appointment (SOA) agreement and all SOA guidelines apply.</p>	<p>Agent Guide (R)</p> <p>SOA Job Aid (R)</p>	<p>Jarvis/Knowledge Center/ Guides</p> <p>Jarvis/Sales & Marketing/ Meeting Resources/ Scope of Appointment (job aid and generic form)</p>	

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Marketing/Sales Appointments Online 1:1 appointments	You are permitted to conduct on-line 1:1 (personal/individual) marketing appointments.	UnitedHealthcare does not promote, endorse, or approve virtual meeting service providers (e.g., Skype, WebEx, FaceTime) and other video chat devices or applications. You are responsible for ensuring that a consumer's PHI/PII is protected and secure.	Agent Guide (R) SOA Job Aid (R)	Jarvis/Knowledge Center/Guides Jarvis/Sales & Marketing/ Meeting Resources/ Scope of Appointment (job aid & generic form)	
COVID-19 In-person event and 1:1 appointment health and safety protocols	For in-person Educational, Marketing/Sales Events and Personal/Individual Appointments: <ul style="list-style-type: none"> • Hand Hygiene • Masking • When Symptoms Detected • Agent Exposure • Contact Tracing • General Expectations 	Centers for Disease Control and Prevention (CDC) guidelines	Agent Guide (R) CDC Guidelines (R) Working Through COVID-19 Safety Protocols (R)	Jarvis/Knowledge Center/ Guides www.cdc.gov Jarvis/Sales & Marketing/ Meeting Resources/Events/ COVID 19 Safety Protocols.	All agents must familiarize themselves with and abide by the COVID-19 protocols. See JarvisWRAP and Agent Communications for updates