

Guidelines for Planning and Working an Event

ALL sales events must be submitted to SCAN. Our process requires that you work through your contracted broker agency who will submit events on your behalf.

	EDUCATIONAL EVENTS	FORMAL & INFORMAL MARKETING & SALES (M&S) EVENTS
Definition	Any event that is advertised as Educational and does NOT include a sales presentation or other M&S activities.	ANY event that includes a sales presentation or M&S activities.
What are M&S Activities?	Giving any type of sales presentation. Handing out or mentioning plan-specific benefits info and advertising materials. Discussing premiums or copay amounts. Handing out or collecting applications.	
Report to SCAN?	Not required. CMS may secret shop these events.	YES. CMS secret shops these events. All events must be submitted on the approved CMS template to SCAN (SeminarSubmission@SCANHealthPlan.com) for broker agents.
Important to Note	Advertisements must display this disclaimer: "This event is only for educational purposes and no plan-specific benefits or details will be shared."	All products to be discussed must be announced at the start of any formal presentation.
Meals & Gifts?	Both are permitted: Up to a total of \$15 per attendee (retail value). Promo items may have SCAN's name, website & toll-free number. All advertising and explanatory material promoting free gifts must include "There is no obligation to enroll" verbiage.	Light snacks only and no-obligation gifts permitted up to a total of \$15 per attendee (retail value). Promo items may have SCAN's name, website & toll-free number. All advertising and explanatory material promoting free gifts must include "There is no obligation to enroll" verbiage.
Hand-Outs?	Any defined by CMS as Educational, but no plan-specific info or bias toward one plan type over another.	All plan brochures and pre-enrollment advertising materials including enrollment forms, Business Reply Cards, and lead cards. Scope of Appointment forms are required if subsequent meeting is requested. Additionally, a CMS-approved sales presentation is available for use at scan.cmpsystem.com
Business Cards?	Permitted ONLY on request. May not be attached to educational materials.	Permitted.

Your Sales Event Submission Process

Make sure you have exact information on the location of your event! SCAN Compliance Assessors must be able to locate you.

Work directly with your agency’s designated coordinator who will process your Event Submission request. They will complete the “SCAN Broker Sales Event Template” and submit your request to **SeminarSubmission@SCANHealthPlan.com** 10 business days in advance of the event or the event’s advertisement. NOTE: We are closed weekends and holidays.

Wait for SCAN’s approval before marketing or conducting your sales event. Sales Operations will respond within two business days of receipt of your request. If accepted, you will receive a confirmation email. If rejected, your agency will be asked to make corrections and resubmit.

Now you are ready to advertise and/or conduct your sales event!

	EDUCATIONAL EVENTS	FORMAL & INFORMAL MARKETING & SALES (M&S) EVENTS
What CAN I Do?	<ul style="list-style-type: none"> Host in a public venue. Include communication activities and distribute communication materials. Answer beneficiary-initiated questions. Set up a future marketing appointment. Hand out business cards and contact information to beneficiaries. Display a banner with SCAN's name and logo. 	<ul style="list-style-type: none"> Accept applications, enroll beneficiaries, set up one-on-one sales appointments (requires an SOA), and request permission to call the attendee. Compare SCAN plans to other Plan/Part D sponsors (using statistical data). Use sign-in sheets that must be clearly labeled as “optional.” If the event is informal, you must wait to be approached before discussing our products.
What CAN'T I Do?	<ul style="list-style-type: none"> Include marketing or sales activities. Distribute marketing materials or enrollment forms. Discuss or distribute plan-specific benefits or materials. 	<ul style="list-style-type: none"> Conduct “cherry-picking” activities such as health screenings. Require attendees to provide contact information before or during the event. Use contact information collected for a raffle/drawing for ANY other purpose. Serve meals or provide gifts that may be turned into cash. Solicit enrollment prior to the start of AEP (October 15 - December 7).

Sales Event Modifications and Cancellations

In the event that you need to modify or cancel a scheduled sales event, notify your agency coordinator immediately.

To Cancel or Modify Your Submission

Communicate all cancellations and modifications to your agency coordinator no less than 72 hours prior to the scheduled date. SCAN will send an email confirmation of the cancellation/modification to your agency coordinator.

A. If cancelled within 48 hours of scheduled date:

- Post a sign stating that the event was cancelled and include notice of alternate event opportunities
- You must appear at the site at the scheduled time and stay 15 additional minutes, unless event was cancelled due to weather
- Advise attendees of the cancellation and possible alternate events
- Event cancellations must also be submitted to SCAN

B. If cancelled more than 48 hours prior to the scheduled date:

- Notify beneficiaries in the same way you advertised the event, (e.g., phone call, newspaper announcement)
- If unable to attest that you reached attendees, follow the method stated in A

C. If cancelled due to non-attendance, follow the method stated in A.

D. If beneficiary sent an RSVP, personally call them and advise of cancelled event.

- Ensure you have permission to call (PTC)

E. Keep documentation of your cancellation. Include the list of beneficiary names, phone numbers, and the date and time you notified them.

““ I’ve had many health plans, but SCAN has been the most amazing. They care about wellness and prevention. ””

– Adrelia W.