**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

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| **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, labled "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 |

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