



Can They Do That?

The following chart outlines acceptable (**Okay**) and unacceptable (**Not Okay**) Part C and Part D Plan practices that may be seen by beneficiaries at education events.

- **Education** is informing a beneficiary in an unbiased way about Original Medicare, Medicare Advantage plans, Part D plans, and Medicare Advantage plan products. Education is considered different from marketing.
 - *Marketing* is steering, or attempting to steer, a potential enrollee towards a plan or limited number of plans.

Education Events for Medicare Part C and Part D	
<p>Okay:</p> <ul style="list-style-type: none"> ✓ Provision of a meal valued at \$15 or less at an event that is for general Medicare education purposes where no marketing occurs. ✓ Providing a beneficiary with one or more salesperson business cards at an educational event and responding to questions <i>if asked</i>, as long as business cards are free of marketing or benefit information. ✓ Offering promotional activities or items that are of “nominal” value. <i>Nominal value</i> is currently defined as worth \$15 or less based on the retail value of the item or activity and is not in the form of cash or rebates. ✓ A beneficiary has reviewed advertising or attended an educational event and gives permission to be contacted by the plan. 	<p>Not Okay:</p> <ul style="list-style-type: none"> ∅ The plan salesperson cannot market in the same building where an education event is taking place (or just took place). This would be considered back-to-back education and marketing, which is prohibited. ∅ Collecting beneficiary contact information at an education event. Examples of violations: <ul style="list-style-type: none"> ○ Asking all participants to provide personal identifying information as part of a general “sign in” sheet ○ Asking for contact information to participate in a drawing for a prize ∅ Agents or brokers may NOT solicit individual appointments under the premise that the appointment is only for educational purposes. ∅ Displaying business cards or attaching them to educational materials. <ul style="list-style-type: none"> ○ Agents or brokers may NOT request Social Security numbers, bank, or credit card information
<p>Call Your Senior Medicare Patrol (SMP): 1-800-247-4422</p>	