Clever Care Sales and Marketing Events

Quick-reference guidelines for broker-hosted Medicare sales events

Before Your Clever Care Event

1.	**You must be certified and appointed before presenting or conducting a Clever Care Health Plan sales event.**
2.	CMS no longer requires that agents register marketing/sales events or appointments with them (Section 70.4.1 of MMG). • ***However***, Clever Care Health Plan still requires that all events and marketing activities, including virtual and online group meetings, are reported to the plan at least 7 days prior to the event. ○ If you're not able to meet the requirement of 7 days, please contact **eventsubmission@ccmapd.com** to see if the timeframe for your event can be met. • All event requests must be submitted using the **Clever Care Event Registration Form**.
3.	You represent Clever Care Health Plan. Therefore, you agree to follow **CMS Medicare Communications and Marketing Guidelines (MCMG)** and the following Clever Care Health Plan guidelines to ensure that we are always compliant.
4.	If you need to cancel, you must give the Clever Care Sales Team (**eventsubmission@ccmapd.com**) **at least 48 hours' notice**. Arrange coverage in case an emergency or conflict keeps you from attending. **Last-minute cancellations are not allowed unless an unforeseen emergency occurs** within the 48-hour window. • If you cancel with less than 48 hours' notice, you must still attend, **arriving at least 15 minutes before the advertised event time and staying at least 15 minutes after it**.
5.	You must have all needed Clever Care Health Plan materials prior to the event, and, during any Clever Care Health Plan event, **you must *exclusively* market and enroll eligible prospects in Clever Care Health Plan products.** • No competitors' plans may be promoted, nor may there be any marketing materials from Clever Care Health Plan competitors presented or on display in the immediate selling area (for example, materials on the same table or electronic marketing content for virtual meetings).
6.	All advertisements created or written by the agent must be approved by Clever Care Health Plan and CMS. • Only materials prepared or approved by CMS and/or Clever Care may be used to promote and advertise events, such as personalized or editable flyers/brochures or electronic presentations. Please see the Clever Care Health **Broker Marketing Storefront** for approved materials.

Your Clever Care Event

1.	You must arrive and be ready at least 15 minutes earlier than the advertised event time and you must stay at the event for the duration you filed for on the **Clever Care Event Registration Form**, with no exceptions. These rules apply to virtual events as well as in-person events.
2.	Upon arrival at the event, you must introduce yourself to a manager or staff at the facility and make sure the staff acknowledges your presence.
3.	You must be dressed in professional business attire.
4.	You must always have your ID with you.
5.	If you must leave the event prior to the scheduled departure time, you must notify Clever Care Health Plan at **eventsubmission@ccmapd.com**.
6.	All Clever Care Health Plan events are subject to secret shopping, by either Clever Care Health Plan or CMS. You will not be notified if or when secret shopping occurs.

Clever Care Event Team & Resources

Register events using the **Clever Care Event Registration Form**.
Order marketing materials through the Clever Care Health **Broker Marketing Storefront**.

For events-related questions, please use the contact information below.
Email: **eventsubmission@ccmapd.com**

Broker Support: 1-877-525-3837| **broker@ccmapd.com**

For additional information, please visit the following links:
Clever Care Health Plan: **CleverCareHealthPlan.com**
CMS: **Medicare Marketing Guidelines**

Important: This quick-reference guide does not replace current CMS requirements, Clever Care policies, training, or approved event instructions.