

SALES TOOL CUSTOMIZATION CHECKLIST

Prior to using materials in the marketplace, please read through this checklist, and ensure that materials adhere to these instructions.

REVIEWED FOR	
<p><u>IMPORTANT: Materials must not be altered in any way with the exception of the contents in carets < > and/or brackets []. All carets, brackets and fields that are not going to be used must be removed prior to use.</u></p> <ul style="list-style-type: none"> • <Carets> = variable content • [Brackets] = content to stay exactly as is or be removed • [<Brackets and Carets>] = content may vary and/or field can be removed • / = choose between the options (e.g., Thank You Referral Flyer allows you to choose between two salutations Clever Care Member or inserting a Member's Name). Remove the option that you do not choose to use. 	<input type="checkbox"/>
<p>When populating customizable fields within carets, only the content intended for that field may be entered. You can abbreviate as appropriate to fit, but no other information may be entered.</p> <p><i>Example of Event Info:</i></p> <p>[<Date/Time>] Saturday, 10/1 at 12:00 pm</p> <p>[<Location>] Clever Care Health Plan</p> <p>[<Address>] 7711 Center Ave., Suite 100</p> <p>[<City>] Huntington Beach</p> <p><i>Example of Sales Agent/Broker Contact Info:</i></p> <p>[<Agent Name>] Carol Clever</p> <p>[<Agent Phone>] 555-555-5555</p> <p>[<Agent Email>] cclever@ccmapd.com</p>	<input type="checkbox"/>
<p>Fillable fields for in-language versions</p> <p>Placeholders for fillable fields will normally be in English however you may insert translated content that is intended for the fillable field.</p> <p>General Rules for Common Translation Terms</p> <p>Addresses: Do not translate</p> <p>Dates: Translate</p> <p>Days of the Week: Translate</p> <p>Time: Translate</p>	<input type="checkbox"/>
<p>Ensure that in instances where special characters were used in fillable fields of in-language versions that the integrity of the characters has not been compromised before printing and/or using material</p>	<input type="checkbox"/>
<p>Prior to printing and distributing advertising materials, ensure that you have addressed all customizable fields, checked them for accuracy, and removed all carets and brackets.</p> <p>Be sure to review <u>all</u> pages as well as include <u>all</u> pages when printing and distributing.</p>	<input type="checkbox"/>