



Medicare Marketing and Sales Presentation Reporting Requirements

Producers are reminded that you must report all planned sales events by using a CMS-approved Sales Presentation Reporting Form.

Background:

In June, 2007, the Centers for Medicare & Medicaid Services (CMS) provided guidance to ensure organizations provide information for all planned monthly marketing and sales events.

Effective August 7, 2009, producers must submit a Sales Presentation Reporting Form for each public marketing or sales meeting event (such as health fairs, senior center presentations, etc.) that includes **any** CIGNA Medicare product.

These products include:

- **CIGNA Medicare Access® (PFFS)** – a Medicare Advantage Private Fee-for-Service plan¹
- **CIGNA Medicare Select Plus Rx®** (HMO) – a Medicare Advantage HMO plan with prescription drug benefits²
- **CIGNA Medicare Rx®** (PDP) – a Medicare Prescription Drug Plan³

Following is the link to CIGNA's Sales Presentation Reporting Form:

http://www.cigna.com/sites/cignamedicare/pdf/Sales_Presentation_Reporting_Form.pdf

This form is to be completed and submitted directly to CIGNA via email (CIGNASalesMeeting@CIGNA.com) OR by fax to 1-866-540-8335 by the 20th of the month prior to the event.

Amendments to **any** marketing/sales event including cancellations, updates and edits, must be updated at least 48 hours prior to the scheduled event.

- If the sales event is cancelled **within** 48 hours of its originally scheduled date and time, a representative must be present at the site of the cancelled event and at the time that the event was scheduled to occur to inform attendees of cancellation and distribute information about the plan. The representative must remain for at least fifteen (15) minutes after the scheduled start time before leaving and must include signage stating that the event was cancelled.
- If the sales event is cancelled **more than** 48 hours of its originally scheduled date and time, beneficiaries are to be notified of the cancellation by the same means as used to advertise the event; i.e. newspaper, personal call, etc.

Please contact us at BrokerCompliance@CIGNA.com if you have any questions relating to this topic.

¹ Available in select counties in AL, AR, CA, CO, FL, GA, HI, IL, IN, LA, MA, ME, MO, NC, NH, NM, NY, OH, OR, PA, SC, TN, TX, VA, VT, WA, WV

² Available in select counties in AZ

³ Available in all 50 states and the District of Columbia

