

## Guidance for hosting virtual sales and educational events with tools like WebEx, Skype and Zoom

### Do...

- ✓ You must report virtual sales and educational events to us in advance, the same way you report in-person events. *You will need to provide the URL, call-in number and meeting codes for your events.*
- ✓ You must report your virtual events either before advertising them, or 10 days before the event's scheduled date, whichever is earlier.
- ✓ Submit your virtual events to us using the Aetna Medicare seminar reporting template spreadsheet. Contact your local [Aetna Medicare Broker Manager](#) if you need a copy. *In the Address column, provide URL, call-in number and meeting codes for your event.*
- ✓ Present a CMS-approved sales presentation - You can find Aetna's sales presentation on [Producer World](#) in video format and as a PDF presentation.
- ✓ Present the plan Summary of Benefits. Plan documents can be found on [AetnaMedicare.com](#) or downloaded from the Ascend Virtual Sales Office app.
- ✓ Before sending plan benefit information or an e-kit, to a prospect, you must get a Scope of Appointment.
- ✓ Answer prospects' questions.
- ✓ Instruct prospects how to complete a Scope of Appointment for a follow-up telephonic meeting.

Aetna is the brand name used for products and services provided by one or more of the Aetna group of subsidiary companies, including Aetna Life Insurance and its affiliates (Aetna).

Prior to engaging in the sale of Aetna Medicare products, producers must be ready to sell, which means certified, contracted, licensed in the applicable states, and appointed by Aetna in accordance with state law. As permitted in certain states, Aetna will order appointments after the first sale.

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### Don't...

- × Don't require prospects to provide additional information beyond their name to register or join a virtual event.
- × Don't complete enrollments virtually. Instead, after you collect a Scope of Appointment, you can send your clients an e-kit so they can enroll online, or you can enroll them telephonically using the RATE tool.
- × Don't ask prospect questions during events that reveal protected health information (PHI).
- × Don't ask for referrals during virtual events.
- × Don't require prospects to complete a Scope of Appointment to join an event.
- × Don't use absolute or qualified superlatives (i.e., "This plan is the best.")
- × Don't claim Aetna is recommended or endorsed by CMS, Medicare of the Department of Health and Human Services.