

Seminar reporting template instructions

You're to report to us the bulk of your *educational events* and *formal and informal marketing/sales seminars* by the **18th of each month**. This is for events scheduled for the following month.

Your events must be reported *prior to the event being advertised or ten calendar days prior* to an event's scheduled date, *whichever is earlier*. We reserve the right to reject event submissions not meeting CMS or our requirements.

All of your *event changes* and *cancellations* (i.e., changes of room, date, address, agent holding event) must also be reported to us. You'll need to report them, *whenever possible*, at least 48 hours *before* their scheduled dates and times. Or, report them *immediately upon your knowledge*. Follow the same process to report event revisions and cancellations that you use when reporting your events.

How to report events

You'll report them on one of our Seminar Reporting Templates.

Where do I find a template

Contact your local Aetna Medicare broker manager to get the correct template. Templates vary slightly by each market.

- To find your local broker manager, go to *Aetna's Producer World* (path: Individual Medicare, Contacts, then select Contact your local broker manager).
- If you sell only Part D products NOT within an Aetna MA/MAPD service area, you can email MedicareSemi@aetna.com for assistance.

We maintain all events in our database. CMS will contact us for event listings to audit or secret shop.

- If you're a **licensed agent within one of our local markets**, you'll report your events directly to your market or upline.
- If you're a **licensed Part D agent not within one of our local markets**, you'll submit your events directly to Agent Oversight's mailbox at MedicareSemi@aetna.com.

Seminar reporting template – CMS & Aetna* required information

The below *required* information must be included when submitting events on our reporting templates. Information must be in the *exact* format listed. You'll find some fields have drop-down boxes for selection choices.

- **MCE ID** (*multi-contract entity number assigned by CMS*) - each MCE ID uses a separate template
Use: **Y0001** for **Aetna/Coventry events**
Use: **Y0123** for **Innovation Health events** – Use: **Y0130** for **Allina Health events**
- **Territory*** - select from drop-down correct territory
- **Contract Number** - Hxxxx (for MA/MAPD plans), Sxxxx (for PDP plans); see drop-down
*If an event covers multiple contract numbers, all contract numbers must be listed for the event, and separated by a comma - **only plan numbers uploaded for an event can be discussed***
- **Presentation Language** - select one from drop-down: English, Spanish, Chinese, Korean, Armenian, Russian, Other
- **Presentation Language, if Other** - list in no more than 50 characters – *fill in only if "other" is selected above*
- **Event Type** - select from drop-down either *Educational, Formal* or *Informal* – ***all educational, formal and informal events must be reported to us***

- **Advertised Event*** - select from drop-down *True* or *False*
- **Event Name** - list in no more than 100 characters
- **Event Date** - mm/dd/yyyy - *cannot show year with 2 digits, must list full year*
- **Event Start Time** - hh:mm AM/PM - list **event's actual start time only** (ex: 1:30 time, list as 01:30 PM)
- **Event End Time*** - hh:mm AM/PM - list **event's anticipated end time only** (ex: 1:30 time, list as 01:30 PM)
- **Brokerage Firm/Agency** - list in no more than 100 characters
- **Facility Type** - select from drop-down one of the following: Health Fair/State Fair/County Fair; Doctor's office; Internet; Retail Store/Store Front/Grocery Store; Health Plan/Insurance Business Office or Facility; Hospital Clinic/Conference Room/Business Office; Hotel/Motel; Library; Mall kiosk; Senior Apartments/Senior Centers/ Assisted Living; Recreational/Community Center; Nursing Home/Skilled Nursing Facility/Rehab Facility; Religious Facility (Church/Temple/Mosque); Restaurant/Coffee Shop; Food bank; Recreational Vehicle/RV Park; School; Other
- **Facility Type if Other** - list in no more than 50 characters - *fill in only if "other" is selected from above*
- **Handicap Accessible*** - select from drop-down either *True* or *False*
- **Agent National Producers Number** - list alpha numeric text in no more than 50 characters - *this is **not** the agent's AWN assigned by Coventry*
- **Seminar Agent Name** - list only one person's name (first & last) in no more than 100 characters
- **Venue Name** - list in no more than 100 characters
- **Venue Phone** - use format: 999-999-9999; *list phone number of venue **where event is conducted***
- **Venue Address1** - list in no more than 50 characters
- **Venue Address2** - list in no more than 50 characters; *leave field blank if no additional info*
- **Venue City** - list in no more than 50 characters; should be text field
- **Venue State** - select from drop-down official state abbreviation - **in caps only** (e.g., MD, FL, PA)
- **Venue Zip Code** - list as 99999 format
- **Event Contact** - list first & last name; *list only one name of **contact person at the venue** (not agent's name)*
- **Contact Phone** - use format: 999-999-9999; *list phone number of **contact person at the venue** (not agent's number)*
- **Venue County*** - list county for event
- **Venue Capacity*** - list capacity number for attendees
- **Agent Type*** - select from drop-down either *Internal* or *External*
- **Target Audience*** - select from drop-down either *Member* or *Prospect*
- **Lead Brand*** - select from drop-down either AET or CVTY; **main brand to be presented at event**

Additional instructions

You can't modify template fields. A slight revision will cause your submission to reject. And, you can't use these four characters (< > ; &) on templates. Your file won't upload if they're used.

