

COMPLIANCE BULLETIN

GUIDANCE FOR UNITED HEALTHCARE AGENTS

GENERIC MARKETING MATERIAL

CB0017-14
May 20, 2014

General Marketing Material

Advertising materials include print materials, websites, and social media. The Compliance Department is working in collaboration with United HealthCare (“UHC”) to ensure all generic marketing materials are compliant with the Centers for Medicare and Medicaid Services’ (“CMS”) and UHC’s guidelines. To help us all stay on track, please submit your generic marketing material to Compliance@NSGAccommunications.com for a review. Your support and cooperation is appreciated.

Quick Tips:

Agency Name:

- Your agency’s name **cannot** include the word Medicare,

Agent Title:

- Cannot include the word Medicare or mislead the consumer; for example, you cannot use titles such as;
 - ✓ Medicare Sales Agent
 - ✓ Medicare Specialist
 - ✓ Senior Advisor

Tips for a Compliant Marketing Piece

- Business Reply Card (BRC)
 - ✓ **Products** - recommended statement: *“Please have a sales agent call me to discuss Medicare Advantage and Prescription Drug Plans and/or Medicare Supplement Insurance Plans.”*
 - ✓ **Contact statement:** *“Please have a sales agent call me...”* or *“By returning this card, a sales agent may contact you by phone, mail or email.”*
 - ✓ You may ask for a client’s age, but cannot ask for their date of birth.
- Use a 12-point font or larger
- Clearly state who is sending the BRC (agency/agent name and contact information)
- Be sure not to include terms such as;
 - ✓ Free
 - ✓ Senior
 - ✓ Entitled
- Product names must be clearly identified;
 - ✓ Medicare Supplement Insurance Plans
 - ✓ Medicare Advantage Plans
 - ✓ Part D Prescription Drug Plans

The source documents for the guidelines listed above include:

- UHC’s External Distribution Channel (EDC) Agent Guide
- Medicare and You Handbook
- Medicare Marketing Guidelines