

Agent Name:	Date:		
Company:			
Venue:			
Event	Setup		
		Yes	No
Sales agent arrived 30 minutes prior to the event.			
Informed event personnel of their arrival.			
Was the event easy to access and location clearly	marked?		
Table display was visually professional			
Distributed material:			
a. Business cards			
b. Business reply cards			
c. Tri-folds			
d. Sales material			
e. Scope of Appointment form			
Consumer l	nteraction		
Agent identified themselves as a sales agent.			
Agent was prepared to speak with consumer.			
Agent was respectful to the consumer.			
Agent used the correct material, per CMS guideli	nes		
Agent stayed the designated amount of time.			
Comments:			
Reviewed by:	Date:		
Rev. 1/14 Agent:	Date:		

Event Guidelines - Not Allowed			
Did the agent?	Yes	No	
Advertise the event as educational?			
Provide meals?			
Provide gift cards, gift certificates or cash as giveaways?			
Request or accept a referral's name and/or contact information?*			
*Agent may provide contact information			
Solicit consumers for an individual appointment stating the			
appointment was for educational purposes?			
Conduct health screenings?			
Discuss or have available non-health related information?			
Adhere to only the product(s) advertised?			
Comments			