



## Website Monitoring Checklist

**Agent Name:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Upline:** \_\_\_\_\_

**Website:** \_\_\_\_\_

**Reviewer:** \_\_\_\_\_

### Standard Guidelines:

	Yes	No	N/A
Font is equivalent to/ larger than a 12 point Times New Roman			
Medicare/Medicaid information included link to Medicare.gov			
Were misleading statements/symbols regarding CMS, Medicare, Medicaid or any other government agency posted?			
Did the website provide numbers, facts and/or figures? If yes, were sources and dates cited?			
Were plan materials or proprietary plan information posted?			
Were foreign drug sales' information or links posted?			

### Consumer Facing Guidelines

Was an electronic business reply card included on the website? If yes, was the appropriate disclaimer noted?			
Were benefits promoted? If yes, was the appropriate disclaimer noted?			

### Agent Facing Guidelines

Were Carrier-specific marketing tools, material or proprietary materials included on the website?			
Was the appropriate agent facing disclaimer provided?			

### Social Media

Was a Company/Carrier announcement made?			
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### Corrective Action

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### Event Guidelines - Not Allowed

<i>Did the agent?</i>	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?*		
<i>*Agent may provide contact information</i>		
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

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