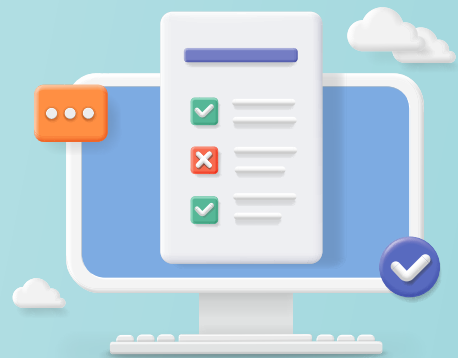


7-Point Compliance Checklist for Medicare Sales and Marketing



Between the complexity of TCPA compliance and increasingly stringent CMS guidelines maintaining compliant outreach needs to be top-of-mind all year round for professionals selling Medicare and health insurance.

Use this handy checklist to bolster your compliance support, help protect your business, and improve your sales process along the way.

1

Review the Updated CMS Guidelines for Marketers

The 2022 edition of **Medicare Communications and Marketing Guidelines (MCMG)** from the Center for Medicare and Medicaid Service (CMS) is essential reading to understand the latest binding rules for which types of outreach are allowed.

2

Conduct a Compliance Risk Assessment

With so many aspects of compliance to worry about, enlist the help of expert counsel to assess and address areas of risk on a regular, quarterly basis to keep up with changing regulations.

3

Train Your Team

Compliance best practices can't be kept as "need to know" information. Schedule regular meetings to update teams, including outbound sales agents, on changes to rules and regulations, and work with your counsel and QA teams to implement and enforce.

4 Build a Foundation of Consent

For TCPA and CMS compliance, consumer consent should be at the heart of everything you do. Improve your compliance support by offering a wide variety of ways to capture consent to contact. This can include online forms, apps, web portals, recorded phone calls, text messages, inbound calls, and more.

5 Know How to Handle Revocation of Consent

Ensure that you efficiently (and automatically) maintain your internal Do Not Call list and can account for reassigned phone numbers.

6 Integrate Compliance Solutions and Automation

Integrate **outbound contact center compliance tools** like DNC scrubbing, **dynamic scripting**, and more to support your team's compliance efforts.

7 Assess and Manage Your Vendors

Assess your network and get to know the businesses you're working with as part of your regular audits. Evaluate and discuss your contract terms to ensure that you both abide by the same compliance standards—and that partners understand their liability obligations.



Convoso adapts really well to a growing business, it gives you all the tools necessary to manage that growth in a sustainable way, without sacrificing your quality, without sacrificing compliance.”

**Diego C., Call Center
Operations Manager
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