

**SMMC Managed Care Plan Report Guide  
Marketing/Public/Educational Events Report Summary**

02/01/2025

**BENEFIT TYPE(S)**

The Managed Care Plan providing the following benefit type(s) must submit this report:

- LTC
- MMA & MMA Specialty
- Dental

**REPORT PURPOSE:**

The purpose of this report is to provide written notice to the Agency of the Managed Care Plan's and the Dental Plan's intent to attend marketing, public, and educational events.

**FREQUENCY & DUE DATES:**

Report Year Type	Report Year Period
C = Calendar	01/01 – 12/31

Report Frequency	Reporting Data Period
V = Variable	Two-digit day of submission date (01-31)
M = Monthly	Two-digit month of data being reported

This report is due no later than the fifteenth (15th) calendar day of the month prior to the event month. Variations to the report originally submitted are due in advance of the scheduled event. If an event is cancelled or the Managed Care Plan and the Dental Plan decides not to attend less than forty-eight (48) hours prior to the event, the Managed Care Plan and the Dental Plan shall immediately (upon notification) submit such changes to the Agency. Any changes to events originally submitted shall be submitted through a variable Marketing/Public/Educational Events Report.

**REPORT CODE & SUBMISSION:**

<b>Report Code</b>	0159 Marketing/Public/Educational Events Report
<b>Report Code</b>	0160 Variable to a reported Event

Using the file naming convention as described in Chapter 2 of this guide, the Managed Care Plan must submit the following to the applicable SFTP site:

- A Marketing/Public/Educational Events Report using the Agency-supplied template. **The month used in the naming convention will represent the month the event will occur.**
- A variable Marketing/Public/Educational Events Report is to be submitted when there is any change to an original reported submittal of a marketing, public, or educational event. The variable event report needs to clearly indicate the change that is being made regarding the event and only contain those events impacted by the change. A comment indicating the reason for the change must be provided for each variable Marketing/Public/Educational Events Report entry. **The month used in the naming convention will be the same month the event was originally scheduled to occur.**
- A report attestation as described in Chapter 2. The month used in the naming convention will represent the month the event will occur.

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- Supplemental documentation for all events reported, including variable Marketing/Public/Educational Events Reports, is also required. Confirmation shall be submitted via any of the following:
  - Event notices/flyers;
  - Invitation letters/emails;
  - Approval notices from any entity whose space is being utilized; and/or
  - Video application service confirmation of virtual event details
  
- Supplemental documentation for all events must contain, at a minimum:
  - Date(s) the event is scheduled to occur
  - Full address of the event (including city, , and suite or unit number, if applicable)
  - Event's scheduled start and end time
  - Video application service, URL, and applicable passcode for virtual events
  
- For variable event reports, the supplemental documentation submitted must clearly indicate the change that is being made from the original event submittal (i.e., change in event time or notice of event cancellation).
  
- For reviewed and/or approved events that are cancelled and rescheduled for a different month, participation in the rescheduled event is granted upon submission of a variable report including the new event details and supplemental documentation confirming the new event date, time, location, and/or virtual event details.
  - The Managed Care Plan and the Dental Plan must not include the rescheduled event on a new month's Monthly Marketing/Public/Educational Events Report.
  
- Supplemental documentation is not required in the event of inclement weather or if the Managed Care Plan or the Dental Plan decides not to attend.
  
- Supplemental documentation must be submitted in a .zip file using the file naming convention of the marketing/public/educational events report. This .zip file may not be password protected. The month used in the naming convention will represent the month the event will occur.

**INSTRUCTIONS:**

1. The Managed Care Plan and the Dental Plan must complete the Marketing/Public/Educational Events Report as specified on the instructions tab of the reporting template using the appropriate report template provided on the Agency website.
  
2. A variable Marketing/Public/Educational Events Report submittal is required when there is any change to an original submittal of a marketing, public, or educational event, including instances where the event is not cancelled but the Managed Care Plan or the Dental Plan decides not to attend. The variable report must include the original event information in the following columns:
  - Event Name,
  - Date of Participation,
  - Start Time,
  - End Time,
  - Physical Location of Event,

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- City,
- County
- Region
- Video Application Service (for virtual events only)
- Event URL (for virtual events only)

The variable event report must clearly indicate the new action(s) taken in the Comments columns and only contain those events where a change or difference has occurred from the original Marketing/Public/Educational Events Report. A comment indicating the reason for the change must be provided for each variable Marketing/Public/Educational Events Report entry.

Note: A variable Marketing/Public/Educational Events Report must not be submitted for changes in participating marketing agent.

Note: A variable event report cannot be used to:

- Submit a new event to the Agency
- Change an event type (i.e. An event originally submitted as public cannot be changed to marketing)

3. The Managed Care Plan and the Dental Plan must only use the permissible drop down options for any column that has a drop down menu.
4. The Managed Care Plan and the Dental Plan must submit a blank report template if there are no planned events to report for the month. This type of submittal must also include an attestation.

**VARIATIONS BY MANAGED CARE PLAN TYPE:**

No variations.

**REPORT TEMPLATE:**

The Agency's template consists of the following:

- ❖ A workbook with three (3) worksheet tabs that include the following:
  - Instructions - explains how to complete the template.
  - Monthly Events Report – contains marketing, public and educational event information.
  - Virtual Events Report – contains virtual marketing, public and educational event information.

The Agency templates can be found using the directions in Chapter 1.

**AMENDMENT HISTORY:**

<b>PLAN COMMUNICATION</b>	<b>DATE</b>	<b>RECAP OF CHANGE(S)</b>
<b>None</b>	<b>None</b>	<b>None</b>