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 demonstrate compliance with the applicable state licensure and/or appointment laws by ensuring Managed Care Plans register and maintain the status of their marketing agents.

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)
Q = Quarterly	Two digits for quarter of data being reported (01, 02, 03, 04)

This report is due on the 15th of the month following the end of the reporting quarter. ~~within forty-five (45) calendar days after the end of the reporting quarter. A variable report is required within fifteen (15) days after a new marketing agent's appointment to the Plan, when there are any changes to the information provided at the time the Managed Care Plan registered the marketing agent with the Agency, or when an agent's appointment with the Managed Care Plan is terminated.~~ When any marketing agent violates any requirements of the Contract, a variable report is required within fifteen (15) days of knowledge of such violation.

REPORT CODE & SUBMISSION:

Report Code	0157

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

- ➢ The completed marketing agent status template, which must be submitted as an XLSX file and named using the file naming convention as described in Chapter 2 of this guide.
- ➢ A report attestation as described in Chapter 2.

INSTRUCTIONS:

1. The Managed Care Plan must complete the quarterly Marketing Agent Status Report as specified on the instructions tab of the report template using the appropriate report template provided on the Agency website.

2. The Managed Care Plan is required quarterly to submit status information for all marketing agents employed by the Plan.

3. The Managed Care Plan must only use the permissible drop down options for any column that has a drop down menu.

~~3.~~4. The Quarterly Marketing Agent Status Report must include all new marketing agents, terminated marketing agents, changes in marketing agent license or appointment information, and name and address changes from the reporting quarter.

~~4.~~5. After a marketing agent has been reported to the Agency as being terminated, then they are to be omitted from the next quarterly report.

~~5.~~6. The Managed Care Plan must submit a blank report template even if no marketing agents are employed. This type of submittal must also include an attestation.

~~6. A variable Marketing Agent Status Report is due within fifteen (15) days after a new marketing agent's appointment to the Plan, or when there are any changes to the information provided at the time the Managed Care Plan registered the marketing agent with the Agency (i.e., last name change, renewal of license), or when an agent's appointment with the Managed Care Plan is terminated.~~

VARIATIONS BY MANAGED CARE PLAN TYPE:
No variations.

REPORT TEMPLATE:
The Agency's template consists of the following:

- A workbook with two (2) worksheet tabs which include the following:

    1. Instructions – explains how to complete the template.

    2. Marketing Agent Status – contains marketing agent information.

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

AMENDMENT HISTORY:

PLAN COMMUNICATION	DATE	RECAP OF CHANGE(S)
RCN 2021-07	**03/19/2021**	• Change in submission requirements for this report; report now due 15 days after reporting quarter (had been due 45 days after reporting quarter). • Update in report template's instruction's tab to reflect change in report's due date.
None	**None**	No change(s) from the SMMC Report Guide 9/1/2019.

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