



Seminar Kit Checklist

A detailed event planning and compliance checklist for Medicare education seminars and webinars.

Inside:

Timeline, compliance review, attendee experience checklist, day-of run sheet, and follow-up prompt.

Updated for 2026. Prepared for educational use by INS Marketing Systems.

Educational resource only. Not connected with or endorsed by the U.S. government or the federal Medicare program. Benefits, costs, networks, formularies, and enrollment rules vary by plan and area. Always verify current details at [Medicare.gov](https://www.medicare.gov), [CMS.gov](https://www.cms.gov), [SocialSecurity.gov](https://www.socialsecurity.gov), and plan documents before enrolling.

1. Seminar Planning Timeline

A professional checklist for educational Medicare seminars, webinars, and community presentations.

Timeframe	Planning action	Owner
6-8 weeks out	Confirm objective, audience, format, venue, registration process, and compliance review requirements.	Marketing / Compliance
4-6 weeks out	Finalize invitation copy, event description, disclosures, presentation slides, handouts, and registration page.	Marketing
2-3 weeks out	Launch compliant promotion, confirm presenters, test technology, and prepare attendee packets.	Event lead
1 week out	Confirm attendee list, reminder messages, signage, handouts, and day-of roles.	Event lead
Day of event	Run welcome script, provide educational content, capture questions, and document follow-up requests.	Presenter
1-3 days after	Send thank-you message, answer outstanding questions, schedule requested appointments, and file records.	Agent / Staff

2. Compliance and Content Review Checklist

Review item	Confirm before publishing or presenting
Educational positioning	The event description explains that the session is educational and not connected with or endorsed by the U.S. government or federal Medicare program.
No misleading claims	Avoid unsupported savings claims, broad benefit promises, or statements that could confuse Medicare beneficiaries.
No unapproved plan comparisons	Do not rank or compare plans unless the material is current, accurate, plan-approved where required, and supported by official plan documents.
Cost and benefit accuracy	Use only current year costs, plan documents, Medicare.gov, CMS.gov, or carrier-approved materials.
Lead capture and follow-up	Use compliant permission-to-contact practices and maintain event/attendee records according to your organization and carrier rules.

Agent note: When a seminar turns into a personal plan discussion, shift to the appropriate appointment process and use the required scope, permission, and documentation practices for your organization and carriers.

3. Attendee Experience Checklist

Area	Professional standard
Registration	Use a simple registration form, confirmation email, reminder email, and clear location or webinar instructions.
Room setup	Provide visible signage, accessible seating, readable slides, working audio, and printed materials.
Opening script	Set expectations: educational session, no obligation, plan details vary, questions welcome.
Presentation flow	Explain Medicare parts, coverage paths, enrollment periods, prescription review, costs, and questions to ask.
Q&A; handling	Answer general questions publicly; take individual plan or health questions privately after the session.
Follow-up	Send thank-you email, provide resources, and schedule requested one-on-one appointments.

4. Day-of Run Sheet

Time	Task
60 minutes before	Arrive, check room setup, test projector/audio, place sign-in and handout materials.
30 minutes before	Open registration, greet attendees, confirm accessibility needs, and start webinar room if virtual.
Start time	Welcome attendees, introduce presenter, read educational disclaimer, and outline agenda.
Presentation	Cover Medicare basics, enrollment windows, cost questions, drug coverage review, and how to prepare for a plan review.
Q&A;	Answer general questions, avoid public discussion of personal health or plan-specific details.
Close	Invite attendees to request follow-up, provide contact information, and explain next steps.

Post-event follow-up template

Subject: Thank you for attending our Medicare education event

Thank you for joining us. Attached are the general educational resources discussed during the session. If you would like a personal Medicare review, please reply with your preferred appointment times and a list of questions you would like to cover.

Source Notes and Compliance Reminder

This resource was prepared using official Medicare, CMS, and federal regulation references. Because plan availability, costs, formularies, networks, and compliance requirements can change, always verify current details before distribution or enrollment discussions.

Source	URL
Medicare & You 2026	https://www.medicare.gov/publications/10050-medicare-and-you.pdf
42 CFR Part 422 Subpart V - MA Communication Requirements	https://www.ecfr.gov/current/title-42/chapter-IV/subchapter-B/part-422/subpart-V
42 CFR Part 423 Subpart V - Part D Communication Requirements	https://www.ecfr.gov/current/title-42/chapter-IV/subchapter-B/part-423/subpart-V
Your Medicare Benefits	https://www.medicare.gov/publications/10116-your-medicare-benefits.pdf

Educational resource only. Not connected with or endorsed by the U.S. government or the federal Medicare program. Benefits, costs, networks, formularies, and enrollment rules vary by plan and area. Always verify current details at Medicare.gov, CMS.gov, SocialSecurity.gov, and plan documents before enrolling.