



Easy Choice

Reporting Sales Events

New Special Event/Seminar Matrix Instructions

Please use the **Arial 10pt font** for all Matrixes.

Do not use **any type** of quotation marks, number signs in the Address or Name of the location.

Do not use all capital letters.

Do not add blank lines or spaces.

If you are adding events to your matrix MAKE sure to highlight them in yellow before sending it.

Keep the Freedom and Optimum Matrixes on two separate spreadsheets.

Do not hide any columns or rows.

Do not make any changes to these instructions. This is the format that is being requested from CMS. **If the format does not match the upload will be rejected and no seminars for you areas will be able to be conducted.**

Follow the instructions below COMPLETELY:

Contract Number: Use either H5427 for Freedom events or H5594 for Optimum events.

Event Name: Use FORMAL: MAPD Seminar (for any events where a presentation will be made) or use INFORMAL: MAPD Table (for any tent events or special event where no presentation will be made)

Event Date: Use the MM/DD/YYYY format. Do not add any extra spaces.

Event Time: Use the HH:MM AM/PM format. It is important that you use this exact format. Make sure the space is after the MM.

Brokerage Firm/Agency: Freedom Captive (for Freedom Events) or Optimum Captive (for Optimum Events)

Venue Name: Enter the full Location Name. Do not use any type of quotation marks or number signs.

Venue Phone Number: Use the 000-000-0000 format.

Venue Address 1: Enter the full street address for the event location. Do not abbreviate the name. Do not use any type of quotation marks or number signs.

Venue Address 2: Leave this blank

Venue State: FL (Even though all events are in Florida you still have to write FL)

Venue Zip Code: Use the 00000 format ONLY.

Event Contact: Enter the full name of the agent conducting the seminar or hosting the event. Do not use any quotation marks or number signs.

Contact Phone: Enter the company cell phone for the agent conducting the seminar or hosting the event.

County Name: Enter the county that the event is being held in.

Maximum Capacity: Enter the maximum capacity that the event location can hold.