



## **Kaiser Permanente Oversight Requirements**

Kaiser Permanente requires field agent sales monitoring and oversight.

An affiliate who is contracted with Kaiser Permanente will be required to monitor or have an agency in their hierarchy monitor a minimum of 1 agent per market, per quarter.

The affiliate shall utilize the Kaiser Permanente evaluation form and complete the FMO Quarterly Monitoring Log report. Non-compliant items noted on the evaluation form will require a remediation plan which includes the compliance element(s) that was missed, as well as a summary of the corrective action taken. (i.e., increased monitoring, manager coaching, etc.) and must include the date when the corrective action was completed.

All reports are due to AmeriLife's Compliance department at  
[KaiserCompliance@AmeriLife.com](mailto:KaiserCompliance@AmeriLife.com)