STAYING COMPLIANT

DURING THE OPEN ENROLLMENT PERIOD

WHAT YOU NEED TO KNOW ABOUT THE OEP

When is the OEP?	January 1 through March 31 each year. For newly MA-eligible individuals, the OEP starts the month of entitlement to both Part A and Part B and continues through the last day of the third month of entitlement. This is known as the Initial Coverage Election Period (ICEP)
Who can use the MA OEP?	Beneficiaries who are enrolled in an MAPD plan or MA- only plan
What can be changed during the MA OEP?	• **Individuals enrolled in an MAPD plan -** can use the OEP to get a different MAPD plan, an MA-only plan or Original Medicare (with or without PDP) • **Individuals enrolled in an MA-only plan -** can use the OEP to switch toa different MA-only plan, an MAPD plan, or Original Medicare (with or without a PDP)
What can't be changed during the MA OEP?	Individuals enrolled in Original Medicare can't use the OEP to join an MA or MAPD plan, add a PDP or change their PDP. The OEP is not available to those enrolled in a Medicare Savings Account or other Medicare health plan types, like cost plans or PACE
When do MA OEP plan election go into effect?	The effective date for an MA OEP plan election is the first of the month following the receipt of the enrollment request
How many plan elections can be made during OEP?	Only one

DURING OEP, DO:	DURING OEP, DON'T:
Do target Medicare Advantage age-ins who have yet to make their enrollment decision.	Do not send unsolicited materials advertising or referencing OEP directly to your customers.
Do send over marketing materials if a customer requests information.	Do not purchase mailing lists or other identifying information to specifically target customers during OEP.
Do conduct one-on-one meetings if a customer requests it.	Do not engage in or promote activities intended to target OEP as an opportunity to make further sales.
Do provide information about OEP if a customer asks about it.	Do not call or contact any customers who selected a new plan during AEP.
Do market to dual-eligible and Low-Income Subsidy (LIS) beneficiaries, who typically can enroll in a standalone Part D plan on a monthly basis.	

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