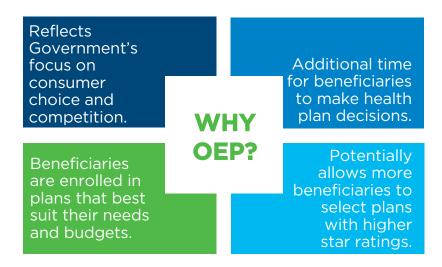
# OPEN ENROLLMENT PERIOD QUICK GUIDE

#### **NAVIGATING SALES AND MARKETING DURING THE NEW OEP**

# OPEN ENROLLMENT PERIOD IS JANUARY 1 TO MARCH 31.

The Federal Government has eliminated the existing MA disenrollment period and replaced it with a new Medicare Advantage open enrollment period (OEP). The new OEP allows individuals enrolled in an MA/MAPD plan, including newly MA-eligible individuals, to make a one-time election to go to another MA/MAPD plan or Original Medicare.



#### Who Can Make a Change?

- Enrollees in an MA or MAPD Plan
- > Newly MA-Eligible Individuals

#### Who May Not Makea Change?

- Beneficiaries Enrolled in Original Medicare.
- Beneficiaries Enrolled in a Medicare Cost Plan.
- Beneficiaries Enrolled in a Standalone Part D Plan.

Together, all the way.



### **MAKING CHANGES DURING OEP**

What Changes Are Allowed?	What Changes Are <u>Not</u> Allowed?
MA-Only to MA-Only	Switching from Original Medicare
MA-Only to MAPD	Addition of Part-D to Original Medicare
MAPD to MA-Only	Enrollment into a Medicare Cost Plan
MAPD to MAPD	Standalone PDP to a different Standalone PDP
MA-Only or MAPD to Original	
Medicare (with or without PDP)	

## **MARKETING DURING OEP**

Permitted	Not Permitted
Send marketing materials when a beneficiary makes a proactive request.	Sending unsolicited materials advertising or referencing the OEP opportunity.
At the beneficiary's request, have one-on-one meetings.	Specifically targeting beneficiaries who are in the OEP by purchasing mailing lists or other means of identification.
At the beneficiary's request, provide information on the OEP.	Engaging in or promoting activities intended to target OEP for further sales.
Market to Age-ins, Duals, Diabetics (C-SNP Plans - AZ and Mid-Atlantic Markets) and LIS Beneficiaries.	Calling or otherwise contacting former enrollees who have selected a new plan during AEP.
Stay in touch with your existing customers.	

