



2012 Election Period Booklet

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2012 Election Periods Available to Medicare Consumers

Newly Eligible Consumers & Annual Election Period

When consumers first become eligible for Original Medicare, they have the ability to enroll into a Prescription Drug Plan (PDP) or Medicare Advantage (MA) plan. This period is for all consumers becoming eligible for Medicare whether it is due to turning 65 or by becoming eligible due to a qualifying disability. The Annual Election Period (AEP), which runs from October 15 to December 7, enables consumers to change or add Prescription Drug Plans (PDPs), change Medicare Advantage plans, return to Original Medicare, or enroll in a Medicare Advantage plan for the first time.

Medicare Advantage Disenrollment Period

The Medicare Advantage Disenrollment Period (MADP), which occurs between January 1 and February 14, gives consumers an annual opportunity to disenroll from their Medicare Advantage plan and return to Original Medicare. Regardless of whether the Medicare Advantage plan included Part D drug coverage, consumers using the MADP to disenroll from their plan are eligible for a coordinating Part D SEP (See Page 26, #18) which allows them to enroll in a PDP during the same timeframe.

Special Election Periods

Special Election Periods (SEP) allow consumers to make an enrollment change in accordance with applicable requirements anytime during the year, including during the period outside of AEP. The SEPs vary in the qualifications to use them as well as the types of elections allowed. Situations such as dual-eligible status and institutionalization provide the ability to switch plans at any time during the year. The Centers for Medicare & Medicaid Services (CMS) has also established a SEP that enables consumers to enroll in a 5-star plan anytime during the year (Note: this SEP currently does not apply to UnitedHealthcare – please do not use this SEP for a UnitedHealthcare plan.) All SEPs are determined and announced by CMS.

Submitting Enrollment Applications

For all Enrollment Applications, an appropriate and applicable election period must be selected. If an election period is missing or incorrect, this can cause delays or denials of enrollment.

It is recommended that agents submit Enrollment Applications to the Enrollment Team the same day that they are received. Completed Enrollment Applications received by the end of the month will be processed for enrollment eligibility for the first of the following month. Incomplete Enrollment Applications will be pended to obtain additional information and could result in denial if information is not received.

NOTE: *Members of MA only coordinated care plans (HMO, POS, PPO) cannot also enroll in a stand-alone PDP. If they enroll in a stand alone PDP, they will be disenrolled from their MA only coordinated care plan.*

2012 Enrollment Elections Timeline

	JAN	FEB	MAR	APR	MAY	JUNE	JULY	AUG	SEPT	OCT	NOV	DEC
Annual Election Period (AEP)	During the AEP, consumer can make a new plan choice. Any type of plan can be selected.										AEP 10/15/11- 12/07/11	
Medicare Advantage Disenrollment Period (MADP)	MADP 1/1/12- 2/14/12		<p>During this time period, consumers can disenroll from their MA/MA-PD plan and return to Original Medicare. A consumer can also elect to enroll in a PDP plan during this period if they elect to disenroll from their MA/MA-PD* plan.</p> <p><i>*Note:</i></p> <ul style="list-style-type: none"> ▪ MA-Only PFFS members who want to enroll in a PDP plan during the MADP need to first submit a disenrollment request to their plan. After that, they can submit an application for a PDP plan using the SEP-ADP. ▪ MA/MA-PD members would be automatically disenrolled from their current plan when the PDP application is processed and do not need to submit a disenrollment request to their plan. 									
Remain with last plan choice	2/15/12 – 12/31/12											
	Consumer must remain with their last plan choice. Changes generally allowed only for Special Election Periods.											
Make changes any time	SPECIAL ELECTION PERIODS (SEP), NEWLY ELIGIBLE (ICEP/IEP), & INSTITUTIONALIZED 1/1/12 - 12/31/12											
	Qualifying members can make changes outside of the AEP timeframe in accordance with applicable requirements.											

Initial Election Period Examples

Following are examples of the IEP/ICEP (Initial Enrollment Period/Initial Coverage Election Period) and the IEP2 (election period for age-ins who were eligible for Medicare prior to age 65) to help you better understand the timeframes for these scenarios.

IEP/ICEP Example

Antonio is turning 65 in April and decides to enroll in both Medicare parts A and B at this time.

January	February	March	April	May	June	July
From January through March, Antonio can enroll with an effective date of April 1.			In April, Antonio turns 65. He is eligible for Part A and Part B.			
			From April through July, Antonio can enroll with an effective date that is the 1 st of the month following the month of election.			

Antonio can enroll in an MA-Only plan any time in this 7-month time frame using the ICEP or Antonio can enroll in an MA-PD or PDP plan any time during this timeframe and use the IEP:

- If he enrolls between January 1 and March his effective date will be April 1.
- If he enrolls between April 1 and July 31 his effective date will be the 1st day of the month following the month the election was made.

IEP2 Example

Sally was eligible for Medicare Parts A and B due to a disability at age 50.

January	February	March	April	May	June	July
From January through March, Sally can enroll in or change MA-PD or PDP plans with an effective date of April 1.			At age 50, Sally was eligible for Part A and Part B due to a disability. In April, Sally turns 65.			
			From April through July, Sally can enroll with an effective date that is the 1 st of the month following the month of election.			

Sally can enroll in or change an MA-PD or PDP plan any time in this 7-month time frame using the IEP2:

- If she enrolls between January 1 and March 31 her effective date will be April 1.
- If she enrolls between April 1 and July 31 her effective date will be the 1st day of the month following the month the election was made.

Election Period Coding – “Cheat Sheet”

Paper Application & iEnroll Coding

For all Enrollment Applications, an appropriate and applicable election period must be selected. If an election period is missing or incorrect, this can cause delays or denials of enrollment.

#	Population	Medicare Advantage	Prescription Drug Plan
1	Newly Eligible (IEP/ICEP) – MA/MA-PD Newly Eligible (IEP)	<ul style="list-style-type: none"> ▪ ICEP (MA Only) ▪ IEP (MA-PD) 	<ul style="list-style-type: none"> ▪ IEP
2	Age-In (Eligible Prior to Age 65)	<ul style="list-style-type: none"> ▪ IEP2 (MA-PD) 	<ul style="list-style-type: none"> ▪ IEP2
3	Enrolling into Part B After Delaying Enrollment	<ul style="list-style-type: none"> ▪ ICEP (due to delayed Part B enrollment) (MA/MA-PD) 	<ul style="list-style-type: none"> ▪ N/A for Prescription Drug Plans
4	Enrolled into Part B during the Part B General Enrollment Period (GEP)	<ul style="list-style-type: none"> ▪ N/A for Medicare Advantage Plans 	<ul style="list-style-type: none"> ▪ SEP-GEP Part B
5	MA/MA-PD/PDP Eligible (2012 Annual Election Period, AEP, 10/15/11 – 12/07/11)	<ul style="list-style-type: none"> ▪ AEP (MA/MA-PD) 	<ul style="list-style-type: none"> ▪ AEP
6	Dual-Eligible (Full Benefit & Partial)	<ul style="list-style-type: none"> ▪ SEP-Dual Eligible Full & Partial (MA/MA-PD) 	<ul style="list-style-type: none"> ▪ SEP-Dual Eligible Full & Partial
7	Dual-Eligible (Loss of Status)	<ul style="list-style-type: none"> ▪ SEP-Dual Eligible (Status Loss) (MA/MA-PD) 	<ul style="list-style-type: none"> ▪ SEP-Dual Eligible (Status Loss)
8	LIS (Non-Medicaid & Maintaining LIS)	<ul style="list-style-type: none"> ▪ SEP- LIS (Newly Eligible) (MA-PD) ▪ SEP-LIS (NonMedicaid/ MntningLIS) (MA-PD) 	<ul style="list-style-type: none"> ▪ SEP- LIS (Newly Eligible) ▪ SEP-LIS (NonMedicaid/ MntningLIS)
9	LIS (Loss of Status)	<ul style="list-style-type: none"> ▪ SEP-LIS (Loss of Status) (MA-PD) 	<ul style="list-style-type: none"> ▪ SEP-LIS (Loss of Status))
10	Institutionalized	<ul style="list-style-type: none"> ▪ OEPI (MA/MA-PD) 	<ul style="list-style-type: none"> ▪ SEP-Institutional
11	Change in Residence	<ul style="list-style-type: none"> ▪ SEP-Change in Residence (MA/MA-PD) 	<ul style="list-style-type: none"> ▪ SEP-Change in Residence
12	Involuntary Loss of Creditable Coverage	<ul style="list-style-type: none"> ▪ SEP-Invol. Loss of Creditable Cvg (MA-PD) 	<ul style="list-style-type: none"> ▪ SEP-Invol. Loss of Creditable Cvg
13	Loss of Employer Group Coverage (Group Retiree, COBRA, & Commercial Coverage)	<ul style="list-style-type: none"> ▪ SEP-Loss of EGHP Coverage (MA/MA-PD) 	<ul style="list-style-type: none"> ▪ SEP-Loss of EGHP Coverage
14	Gain Employer Group Coverage	<ul style="list-style-type: none"> ▪ SEP-Group Retiree (MA/MA-PD) 	<ul style="list-style-type: none"> ▪ SEP-Group Retiree

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#	Population	Medicare Advantage	Prescription Drug Plan
15	Non-Renewing	<ul style="list-style-type: none"> SEP-Termination/non renewal (MA/MA-PD) 	<ul style="list-style-type: none"> SEP-Termination/non renewal
16	Non-Renewing Cost Plan	<ul style="list-style-type: none"> SEP-Cost (MA/MA-PD) 	<ul style="list-style-type: none"> SEP-Cost
17	Termination of Plan Contract	<ul style="list-style-type: none"> SEP-Contract non renewal (MA/MA-PD) 	<ul style="list-style-type: none"> SEP-Contract non renewal
18	Enroll in a PDP during the MADP disenrollment period	<ul style="list-style-type: none"> N/A for Medicare Advantage Plans 	<ul style="list-style-type: none"> SEP-ADP
19	Retro Medicare Determination	<ul style="list-style-type: none"> SEP-Retro Medicare Determination (MA Only) IEP (MA-PD) 	<ul style="list-style-type: none"> IEP
20	Retro ESRD Determination	<ul style="list-style-type: none"> SEP-Retro ESRD Determination ESRD (MA/MA-PD) 	<ul style="list-style-type: none"> N/A for Prescription Drug Plans
21	SPAP Members	<ul style="list-style-type: none"> SEP-SPAP Enrollee (MA-PD) 	<ul style="list-style-type: none"> SEP-SPAP Enrollee
22	SPAP Loss of Eligibility	<ul style="list-style-type: none"> SEP-SPAP Enrollee (MA-PD) 	<ul style="list-style-type: none"> SEP-SPAP Enrollee
23	Chronic Condition	<ul style="list-style-type: none"> SEP-Special Need/Chronic (MA-PD) 	<ul style="list-style-type: none"> N/A for Prescription Drug Plans
24	Special Needs Status Change for Members of SNP	<ul style="list-style-type: none"> SEP-Loss of SNP Status (MA/MA-PD) 	<ul style="list-style-type: none"> SEP-Loss of SNP Status
25	Chronic SNP Non-Eligibility	<ul style="list-style-type: none"> SEP- Chronic Non-Eligible (PFFS MA Only/MA-PD) 	<ul style="list-style-type: none"> SEP- Chronic Non-Eligible
26	PACE	<ul style="list-style-type: none"> SEP-PACE Switcher (MA/MA-PD) 	<ul style="list-style-type: none"> SEP-PACE Switcher
27	Consumers disenrolling from a cost plan and the cost plan's optional supplemental Part D benefit	<ul style="list-style-type: none"> N/A for Medicare Advantage Plans 	<ul style="list-style-type: none"> SEP-Leaving Optional Part D Cost
28	Loss of Part B	<ul style="list-style-type: none"> N/A for Medicare Advantage Plans 	<ul style="list-style-type: none"> SEP-Lost MA-PD and Part B
29	First Time MA Member (Age-In)	<ul style="list-style-type: none"> N/A for Medicare Advantage Plans 	<ul style="list-style-type: none"> SEP-SEP 65
30	Consumers in an MA-PD who drop Medigap and are in Trial period	<ul style="list-style-type: none"> N/A for Medicare Advantage Plans 	<ul style="list-style-type: none"> SEP-Indiv drop Medigap-Trial period
31	Eligible for Other Creditable Coverage	<ul style="list-style-type: none"> SEP-Elgbl for Other Creditable Cov (MA Only) 	<ul style="list-style-type: none"> N/A – Disenrollment election only

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Election Period Details – Medicare Advantage Plans

#	Population	Qualification	Qualification Items <u>you can check</u> <i>Do not submit copies w/ application</i>	Time Frame	Effective Date	# Elections Allowed	Application Coding <i>If SEP, please include reason</i>
Consumers Newly Entitled to Medicare or Medicare Part D							
1	Newly Eligible (IEP/ICEP)	Entitled to and has BOTH Part A and B for the first time*	<p><i>The consumer is not required to submit proof of entitlement. The plan is required to verify Medicare entitlement.</i></p> <ul style="list-style-type: none"> ▪ Medicare Entitlement Letter ▪ Copy of Medicare ID Card or SSA Award Letter 	<p>7 month Election Period Begins 3 months before month of entitlement</p> <p>Includes the birthday month</p> <p>Ends last day of 3rd month after month of the earlier effective date of Part A/B entitlement (usually 65th birthday).</p> <p>NOTE:</p> <ul style="list-style-type: none"> ▪ <i>The end of the ICEP is generally the end of the consumer's initial enrollment period for enrolling into Part B.</i> ▪ <i>The 7-month period is usually centered on the earlier of the Part A date or Part B date.</i> 	<ul style="list-style-type: none"> ▪ Enrollment request made prior to month of eligibility, effective date is first day of the month of eligibility. ▪ Enrollment request made during or after first month of eligibility, effective date is first day of the month following the month of election. ▪ Generally, a consumer with a birth date of the 1st of the month will have an effective date that may be the first day of the previous month. Be sure to check the Medicare card or entitlement letter for eligibility date(s). 	<p>1 Election*</p> <p><i>*Enroll into MA-Only or MA-PD</i></p>	<p>Code: ICEP <i>(if MA-Only election)</i></p> <p>Code: IEP <i>(if MA-PD election)</i></p>

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2	Age-In (Eligible Prior to Age 65)	<ul style="list-style-type: none"> ▪ Turning 65 -AND- ▪ Was eligible for Medicare prior to age 65 	<p><i>The consumer is not required to submit proof of entitlement. The plan is required to verify Medicare entitlement.</i></p> <ul style="list-style-type: none"> ▪ Copy of Medicare ID Card or SSA Award Letter* 	<p>7 month Election Period Begins 3 months before month of entitlement</p> <p>Includes the birthday month</p> <p>Ends last day of 3rd month after month of the earlier effective date of Part A/B entitlement (usually 65th birthday).</p>	<ul style="list-style-type: none"> ▪ Enrollment request made prior to month of birthday, effective date is first day of the month of birthday. ▪ Enrollment request made during or after first month of birthday, effective date is first day of the month following the month of election. ▪ Generally, a consumer with a birth date of the 1st of the month will have an effective date that may be the first day of the previous month. Be sure to check the Medicare card or entitlement letter for eligibility date(s). 	1 Election* *Enroll into or change MA-PD plan	Code: IEP2
3	Enrolling into Part B After Delaying Enrollment	<ul style="list-style-type: none"> ▪ Entitled to Part A ▪ Newly enrolled in Part B after delaying enrollment more than 3 months after month of entitlement, thereby delaying enrollment into an MA-Only or MA-PD plan. 	<p><i>The consumer is not required to submit proof of entitlement. The plan is required to verify Medicare entitlement.</i></p> <ul style="list-style-type: none"> ▪ Medicare entitlement letter* ▪ Copy of Medicare ID Card or SSA Award Letter 	<p>Begins 3 months before Part B effective date</p> <p>Ends last day of the month before Part B effective date</p>	<p>Must be equal to Part B effective date.</p> <p><i>Note: Application must be received prior to Part B effective date.</i></p>	1 Election* *Enroll into MA-Only or MA-PD	Code: ICEP (due to delayed Part B enrollment)

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4	Enrolled into Part B during the Part B General Enrollment Period (GEP)	Not Applicable for Medicare Advantage Plans					
2012 Annual Election Period (AEP)							
5	Annual Election Period	All Medicare consumers	<ul style="list-style-type: none"> ▪ Member Attestation ▪ Complete Enrollment Application Taken 10/15 or Later 	Begins 10/15/11 Ends 12/07/11	<ul style="list-style-type: none"> ▪ December 31 disenrollment effective date -OR- ▪ January 1 enrollment effective date 	1 Election*	Code: AEP <i>*Enroll into MA Only, MA-PD, or Disenroll into Original Medicare</i> <i>Note: last election made, determined by the application date, will be the election that takes effect.</i>
Low Income Consumers							
6	Dual-Eligible	Medicaid Consumer <i>(Full Benefit & Partial)</i>	<ul style="list-style-type: none"> ▪ Member Attestation ▪ Medicaid # ▪ Medicaid Card ▪ Medicaid Award Letter 	As long as Medicaid eligible or entitled to MSP*	First day of the month following receipt of election.	Continuous*	Code: SEP Reason: Dual Eligible Full & Partial <i>*Enroll into MA-Only, MA-PD, or Disenroll into Original Medicare</i>

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7	Dual-Eligible <i>(Loss of Status)</i>	No longer eligible for Medicaid benefits <i>(Full Benefit & Partial)</i>	<ul style="list-style-type: none"> ▪ Member attestation ▪ State Notice <i>regarding loss of dual eligible status</i> 	<p>Begins month the loss of dual eligibility notification is received and continues two additional months</p> <p>Ends with the date consumer makes an election or the last day of the third month after notification received.</p>	First day of the month following receipt of election.	1 Election* <i>*Enroll into MA-Only, MA-PD, or Disenroll into Original Medicare</i>	<p>Code: SEP</p> <p>Reason: Dual-Eligible (Status Loss)</p>
8	LIS <i>(Non-Medicaid & Maintaining LIS)</i>	Has Part D premium subsidy	<ul style="list-style-type: none"> ▪ Member attestation ▪ Redetermination Letter ▪ SSA or Medicaid Award Letter <i>(if letter shows the actual levels)</i> 	As long as eligible for Part D subsidy	First day of the month following receipt of election.	Continuous* <i>*Enroll into MA-PD</i>	<p>Code: SEP</p> <p>Reason: LIS (Newly Eligible)</p> <p style="text-align: center;">- OR -</p> <p>Code: SEP</p> <p>Reason: LIS (Non Medicaid/Mntning LIS)</p>

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Election Period Details – Medicare Advantage Plans

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9	LIS <i>(Loss of Status)</i>	Has lost the Part D premium subsidy	<ul style="list-style-type: none"> ▪ Member attestation ▪ Redetermination Letter ▪ SSA or Medicaid Award Letter <i>(if letter shows the actual levels)</i> ▪ Termination Notice 	<p>If loss of subsidy occurs at end of calendar year*: Begins January 1 Ends March 31</p> <p>If loss of subsidy occurs mid-year: Begins when notified of the loss Ends two months after notification</p> <p><i>* January 1 effective date is available if loss of subsidy occurs at the end of the calendar year.</i></p>	First day of the month following receipt of election.	1 Election* <i>*Enroll into MA-PD</i>	Code: SEP Reason: LIS (Loss of Status)
Institutionalized Consumers							
10	Institutionalized	Moves into or resides in Skilled Nursing Facility (SNF), nursing facility (NF), intermediate care facility for the mentally retarded, psychiatric hospital, rehabilitation hospital, Long Term Care (LTC) hospital, or swing-bed hospital with an expecting stay of at least 90 days.	<ul style="list-style-type: none"> ▪ Member Attestation ▪ Facility Address & Contact Information* 	<p>Begins first day institutionalized</p> <p>Ends 2 months after discharge</p>	First day of the month following receipt of election.	Continuous* <i>*Enroll into MA-Only, MA-PD, or Disenroll into Original Medicare</i>	Code: OEPI

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Consumers Who Move							
11	Change in Residence	<ul style="list-style-type: none"> ▪ Permanently moved inside plan’s service area with new plan options available ▪ Permanently moved outside plan’s service area ▪ Incarcerated individuals who have now been released 	<ul style="list-style-type: none"> ▪ Member Attestation ▪ New Address on Enrollment Form 	<p><u>Before Move</u> Begins month before permanent move</p> <p>Ends 2 months after the move</p> <p><u>After Move</u> Begins month consumer notified current plan of the move or the month the member was terminated by the plan due to residing outside of the service area</p> <p>Ends 2 months after notification of move or after notification of Plan term</p>	First day of the month up to 3 months after receipt of election but not earlier than the day of move.	1 Election* *Enroll into MA-Only or MA-PD	<p>Code: SEP</p> <p>Reason: Change in Residence</p> <p><i>NOTE: Please ensure new address is entered on the application</i></p>
Loss of Coverage							
12	Involuntary Loss of Creditable Coverage	<ul style="list-style-type: none"> ▪ Involuntarily lost creditable coverage ▪ Coverage deemed no longer creditable <p><i>NOTE: Does NOT include loss of coverage due to nonpayment of premium</i></p>	<ul style="list-style-type: none"> ▪ Member Attestation ▪ Letter stating loss of creditable coverage 	<p>Begins either month of notice or month the loss or reduction of coverage occurs, whichever is later</p> <p>Ends 2 months later</p>	First day of the month following receipt of election or if consumer requests, up to 2 months from the end of the SEP.	1 Election* *Enroll into MA-PD (Enrollment into MA-Only not allowed)	<p>Code: SEP</p> <p>Reason: Invol. Loss of Creditable Cvg</p>

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Change in Employer Group Health Plan							
13	Loss of Employer Group Coverage <i>(Group Retiree, COBRA, & Commercial Coverage)</i>	Voluntary/involuntary termination of group coverage	<ul style="list-style-type: none"> ▪ Member Attestation ▪ Term Letter <i>from group or COBRA</i> ▪ Copy of email <i>from group attesting to disenrollment</i> 	<p>Begins month group allows for disenrollment or date COBRA ends</p> <p>Ends 2 months after group coverage ends*</p> <p><i>*Must be enrolled in Part B to elect MA/MA-PD plan</i></p>	Can choose an effective date up to 3 months in advance after receipt of election but not earlier than the first of the month following month in which the request is made.	1 Election* <i>*Enroll into MA-Only, MA-PD, or Disenroll into Original Medicare</i>	Code: SEP Reason: Loss of EGHP Coverage
14	Gain Employer Group Coverage	Gain or enroll into employer group coverage	<ul style="list-style-type: none"> ▪ Member Attestation ▪ Group Letter <i>describing coverage options</i> 	<p>Begins month plan is open for enrollment (or as group allows)</p> <p>Ends 2 months after plan coverage takes effect</p>	Employer Groups can choose an effective date up to 3 months in advance after receipt of election but not earlier than the first of the month following month in which the request is made.	1 Election* <i>*Enroll into MA-Only, MA-PD, or Disenroll into Original Medicare</i>	Code: SEP Reason: Group Retiree
Termination/Non-Renewal							
15	Non-Renewing	Plan no longer offered in area	<ul style="list-style-type: none"> ▪ Member Attestation ▪ Copy of Non-Renewal Notice 	<p>Begins Dec 8 of that year</p> <p>Ends Last day of February of the following year</p>	<ul style="list-style-type: none"> ▪ Enrollment request in December will have a January 1 effective date ▪ Enrollment request in January will have a February 1 effective date ▪ Enrollment request in February will have a March 1 effective date 	1 Election* <i>*Enroll into MA-Only or MA-PD</i>	Code: SEP Reason: Termination/non renewal

Election Period Details – Medicare Advantage Plans

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16	Non-Renewing Cost Plan	Cost Plan no longer offered in area	<ul style="list-style-type: none"> ▪ Member Attestation ▪ Copy of Non-Renewal Notice 	Begins Dec 8 of that year Ends Last day of February of the following year	<ul style="list-style-type: none"> ▪ Enrollment request in December will have a January 1 effective date ▪ Enrollment request in January will have a February 1 effective date ▪ Enrollment request in February will have a March 1 effective date 	1 Election* <i>*Enroll into MA-Only or MA-PD</i>	Code: SEP Reason: Cost
17	Termination of Plan Contract	Contract terminated with/without mutual consent of Medicare	<ul style="list-style-type: none"> ▪ Member Attestation ▪ Copy of Termination Notice 	<u>With mutual consent</u> Begins 2 months before proposed termination date Ends 1 month after effective date of termination <u>Without mutual consent</u> Begins 1 month before termination is effective Ends 2 months after effective date of termination	<u>With Mutual Consent</u> First day of the month after notice received or up to 2 months after the effective date of termination but not earlier than receipt of election. <u>Without Mutual Consent</u> First day of the month after notice received up to 3 months after month of termination but not earlier than receipt of election.	1 Election* <i>*Enroll into MA-Only, MA-PD, or Disenroll into Original Medicare</i>	Code: SEP Reason: Contract non renewal
Other							
18	Medicare Advantage Disenrollment Period (MADP)	Not an applicable election period to enroll in a Medicare Advantage plan					

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Election Period Details – Medicare Advantage Plans

#	Population	Qualification	Qualification Items <u>you can check</u> <i>Do not submit copies w/ application</i>	Time Frame	Effective Date	# Elections Allowed	Application Coding <i>If SEP, please include reason</i>
19	Retro Medicare Determination	Medicare entitlement verification is made retroactively.	<ul style="list-style-type: none"> ▪ Member Attestation ▪ Medicare Entitlement Letter 	<p>Begins month notice of entitlement is received</p> <p>Ends 2 months after month notice is received</p>	First of the month following receipt of the election	1 Election* <i>*Enroll into MA-Only or MA-PD</i>	<p>Code: SEP</p> <p>Reason: Retro Medicare Determination (if MA Only election)</p> <p>Code: IEP (if MA-PD election)</p>
20	Retro ESRD Determination	<p>ESRD status was determined after consumer's ICEP passed. May elect MA if:</p> <ul style="list-style-type: none"> ▪ Were in a health plan offered under the same MA contract # the month before Part A/B entitlement, -AND- ▪ Developed ESRD while a member of that health plan, -AND- ▪ Still enrolled in that health plan -OR- ▪ Had untimely entitlement determination due to an administrative delay 	<ul style="list-style-type: none"> ▪ Member Attestation (if current member) ▪ Physician Statement/Letter 	<p>Begins month received notice of Medicare entitlement</p> <p>Ends 2 months after the month notice is received</p>	First day of the month following receipt of election.	1 Election* <i>*Enroll into MA-Only or MA-PD</i> <i>NOTE: In cases of retro ESRD determination, a consumer is retroactively determined to be eligible for Medicare. The consumer may choose to enroll into a PDP, which would fall under the SEP described in #19 above.</i>	<p>Code: SEP</p> <p>Reason: Retro ESRD Determination ESRD</p>

Election Period Details – Medicare Advantage Plans

#	Population	Qualification	Qualification Items <u>you can check</u> <i>Do not submit copies w/ application</i>	Time Frame	Effective Date	# Elections Allowed	Application Coding <i>If SEP, please include reason</i>
21	SPAP Members	Individuals who belong to a qualified SPAP	<ul style="list-style-type: none"> ▪ Member Attestation ▪ State Facilitation Letter 	One election per calendar year for SPAP members	First day of the month following receipt of election.	1 Election* <i>*Enroll into MA-PD (Enrollment into MA-Only not allowed)</i> <i>*One election is allowed each subsequent calendar year for consumers who remain SPAP members.</i>	Code: SEP Reason: SPAP Enrollee
22	SPAP Loss of Eligibility	Members of qualified SPAPs who lose SPAP eligibility	<ul style="list-style-type: none"> ▪ Member Attestation ▪ Letter <i>attesting to loss of SPAP eligibility</i> 	Begins month the loss of eligibility notification is received Ends 2nd month after month notice is received	First day of the month following receipt of election.	1 Election* <i>*Enroll into MA-PD (Enrollment into MA-Only not allowed, and disenrollment from Part D not allowed)</i>	Code: SEP Reason: SPAP Enrollee

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Election Period Details – Medicare Advantage Plans

#	Population	Qualification	Qualification Items <u>you can check</u> <i>Do not submit copies w/ application</i>	Time Frame	Effective Date	# Elections Allowed	Application Coding <i>If SEP, please include reason</i>
23	Chronic Condition	<ul style="list-style-type: none"> ▪ Consumer has a severe or disabling chronic condition(s) that an appropriate Evercare SNP is designed to serve AND – ▪ Consumer is not currently enrolled in a chronic SNP serving that condition. 	<ul style="list-style-type: none"> ▪ Form – "Authorization for Use or Disclosure of Health Information" (<i>authorization from Evercare allowing contact with physician</i>) ▪ Letter <i>attesting to severe or disabling condition from provider (to expedite the process)</i> 	<p>Begins upon qualification of disabling condition</p> <p>Ends when enrolled in SNP</p>	First day of the month following receipt of election.	1 Election*	<p>Code: SEP</p> <p>Reason: Special Need/ Chronic</p> <p><i>NOTE: MA plan to verify condition with provider before election is considered complete. This could delay access to benefits.</i></p>
24	Special Needs Status Change for Members of SNP	Disenrolled from SNP due to loss of special needs status	<ul style="list-style-type: none"> ▪ Member Attestation ▪ Letter <i>attesting to loss of special needs status</i> 	<p>Begins month of effective date of disenrollment</p> <p>Ends 3 month after the date of involuntary disenrollment.</p>	First day of the month following receipt of election.	1 Election*	<p>Code: SEP</p> <p>Reason: Loss of SNP Status</p> <p><i>*Enroll into MA-Only or MA-PD</i></p>
25	Chronic SNP Non-Eligibility	Consumer enrolled in a chronic SNP who is not verified for enrollment and is disenrolled two months after the effective date	<ul style="list-style-type: none"> ▪ Member Attestation ▪ Letter <i>attesting to non-eligibility for chronic SNP</i> 	<p>Begins upon notification of non-eligibility</p> <p>Ends 2 months after month notice is received</p>	First day of the month following receipt of election	1 Election*	<p>Code: SEP</p> <p>Reason: Chronic Non-Eligible</p> <p><i>*Enroll into MA-PD or PFFS (MA-only) if accompanied by a PDP enrollment. Consumer cannot drop Part D.</i></p>

Election Period Details – Medicare Advantage Plans

#	Population	Qualification	Qualification Items <u>you can check</u> <i>Do not submit copies w/ application</i>	Time Frame	Effective Date	# Elections Allowed	Application Coding <i>If SEP, please include reason</i>
26	PACE	Consumer enrolling or disenrolling from PACE	<ul style="list-style-type: none"> ▪ Member Attestation ▪ PACE Enrollment Letter ▪ PACE Member ID Card 	<p>Begins the effective date of PACE disenrollment.</p> <p>Ends 2 months after effective date of PACE disenrollment to elect MA Only or MA-PD plan.</p> <p>NOTE: <i>May disenroll from plan at any time to enroll in PACE</i></p>	First day of the month following receipt of election.	1 Election* <i>*Enroll into MA-Only or MA-PD</i>	<p>Code: SEP</p> <p>Reason: PACE Switcher</p>
27	Consumers disenrolling from a cost plan and the cost plan's optional supplemental Part D benefit	Not Applicable for Medicare Advantage Plans					
28	Loss of Part B	Not Applicable for Medicare Advantage Plans					
29	First Time MA Member <i>(Age-In)</i>	Not Applicable for Medicare Advantage Plans					
30	Consumers who drop Medigap and are in Trial Period	Not Applicable for Medicare Advantage Plans					
31	Eligible for Other Creditable Coverage	Consumers currently enrolled in MA-PD or stand alone Part D plan are allowed to disenroll from their Part D Plan to obtain or maintain other types of creditable coverage, such as VA or Tricare for Life	<ul style="list-style-type: none"> ▪ Member Attestation ▪ Statement of Proof <i>from Other Coverage</i> 	<p>Begins immediately</p> <p>Ends date elected for disenrollment</p>	First day of the month following receipt of disenrollment request.	1 Election* <i>*Enroll into MA-Only (if leaving an MA-PD) or Disenroll into Original Medicare</i>	<p>Code: SEP</p> <p>Reason: Elgbl for Other Creditable Cov</p>

Election Period Details – Prescription Drug Plans (PDP)

#	Population	Qualification	Qualification Items you can check <i>Do not submit copies w/ application</i>	Time Frame	Effective Date	# Elections Allowed	Application Coding <i>If SEP, please include reason</i>
Consumers Newly Entitled to Medicare or Medicare Part D							
1	<i>Newly Eligible (IEP)</i>	Entitled to and has EITHER A or B for the first time* <i>*For PDP elections, consumer only has to have Part A or Part B to be eligible.</i>	<i>The consumer is not required to submit proof of entitlement. The plan is required to verify Medicare entitlement.</i> <ul style="list-style-type: none"> ▪ Medicare Entitlement Letter ▪ Copy of Medicare ID Card or SSA Award Letter 	7 month Election Period Begins 3 months before month of entitlement Includes the birthday month Ends last day of 3 rd month after month of the earlier effective date of Part A/B entitlement (usually 65 th birthday). NOTE: <ul style="list-style-type: none"> ▪ <i>The 7-month period is usually centered on the earlier of the Part A date or Part B date</i> 	<ul style="list-style-type: none"> ▪ Enrollment request made prior to month of eligibility, effective date is first day of the month of eligibility. ▪ Enrollment request made during or after first month of eligibility, effective date is first day of the month following the month of election. ▪ Generally, a consumer with a birth date of the 1st of the month will have an effective date that may be the first day of the previous month. Be sure to check the Medicare card or entitlement letter for eligibility date(s). 	1 Election* <i>*Enroll into PDP</i>	Code: IEP

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Election Period Details – Prescription Drug Plans (PDP)

#	Population	Qualification	Qualification Items <u>you can check</u> <i>Do not submit copies w/ application</i>	Time Frame	Effective Date	# Elections Allowed	Application Coding <i>If SEP, please include reason</i>
2	Age-In <i>(Eligible Prior to Age 65)</i>	<ul style="list-style-type: none"> ▪ Turning 65 -AND- ▪ Was eligible for Medicare prior to age 65 	<p><i>The consumer is not required to submit proof of entitlement. The plan is required to verify Medicare entitlement.</i></p> <ul style="list-style-type: none"> ▪ Copy of Medicare ID Card or SSA Award Letter* 	<p><u>7 month Election Period</u> Begins 3 months before month of entitlement</p> <p>Includes the birthday month</p> <p>Ends last day of 3rd month after month of the earlier effective date of Part A/B entitlement (usually 65th birthday).</p>	<ul style="list-style-type: none"> ▪ Enrollment request made prior to month of birthday, effective date is first day of the month of birthday. ▪ Enrollment request made during or after first month of birthday, effective date is first day of the month following the month of election. ▪ Generally, a consumer with a birth date of the 1st of the month will have an effective date that may be the first day of the previous month. Be sure to check the Medicare card or entitlement letter for eligibility date(s). 	<p>1 Election*</p> <p><i>*Enroll into or change PDP plan</i></p>	<p>Code: IEP2</p>
3	Enrolling into Part B After Delaying Enrollment	Not Applicable for Prescription Drug Plans					

Election Period Details – Prescription Drug Plans (PDP)

#	Population	Qualification	Qualification Items <u>you can check</u> <i>Do not submit copies w/ application</i>	Time Frame	Effective Date	# Elections Allowed	Application Coding <i>If SEP, please include reason</i>
4	Enrolled into Part B during the Part B General Enrollment Period (GEP)	Not entitled to premium-free Part A & enrolled in Part B during the GEP for Part B	<p><i>The consumer is not required to submit proof of entitlement. The plan is required to verify Medicare entitlement.</i></p> <ul style="list-style-type: none"> ▪ Member Attestation ▪ Copy of Medicare ID Card or SSA Award Letter* 	Begins 04/01 Ends 06/30	July 1 (only)	1 Election* *Enroll into PDP	Code: SEP Reason: GEP Part B
2012 Annual Election Period (AEP)							
5	Annual Election Period	All Medicare consumers	<ul style="list-style-type: none"> ▪ Member Attestation ▪ Complete Enrollment Application Taken 10/15 or Later 	Begins 10/15/11 Ends 12/07/11	<ul style="list-style-type: none"> ▪ December 31 disenrollment effective date <li style="text-align: center;">-OR- ▪ January 1 enrollment effective date 	1 Election* *Enroll into PDP or disenroll from PDP <i>Note: last election made, determined by the application date, will be the election that takes effect.</i>	Code: AEP
Low Income Consumers							
6	Dual-Eligible	Medicaid Consumer <i>(Full Benefit & Partial)</i>	<ul style="list-style-type: none"> ▪ Member Attestation ▪ Medicaid # ▪ Medicaid Card ▪ Medicaid Award Letter 	As long as Medicaid eligible or entitled to MSP*	First day of the month following receipt of election.	Continuous* *Enroll into PDP	Code: SEP Reason: Dual Eligible Full & Partial

Election Period Details – Prescription Drug Plans (PDP)

#	Population	Qualification	Qualification Items you can check <i>Do not submit copies w/ application</i>	Time Frame	Effective Date	# Elections Allowed	Application Coding <i>If SEP, please include reason</i>
7	Dual-Eligible <i>(Loss of Status)</i>	No longer eligible for Medicaid benefits <i>(Full Benefit & Partial)</i>	<ul style="list-style-type: none"> ▪ Member Attestation ▪ State Notice <i>regarding loss of dual eligible status</i> 	<p>Begins month the loss of dual eligibility notification is received and continues two additional months</p> <p>Ends with the date consumer makes an election or the last day of the third month after notification received.</p>	First day of the month following receipt of election.	1 Election* *Enroll into PDP	<p>Code: SEP</p> <p>Reason: Dual-Eligible (Status Loss)</p>
8	LIS <i>(Non-Medicaid & Maintaining LIS)</i>	Has Part D premium subsidy	<ul style="list-style-type: none"> ▪ Member Attestation ▪ Redetermination Letter ▪ SSA or Medicaid Award Letter <i>(if letter shows the actual levels)</i> 	As long as eligible for Part D subsidy	First day of the month following receipt of election.	Continuous* *Enroll into PDP	<p>Code: SEP</p> <p>Reason: LIS (Newly Eligible)</p> <p style="text-align: center;">- OR -</p> <p>Code: SEP</p> <p>Reason: LIS (Non Medicaid/Mntning LIS)</p>

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Election Period Details – Prescription Drug Plans (PDP)

#	Population	Qualification	Qualification Items <u>you can check</u> <i>Do not submit copies w/ application</i>	Time Frame	Effective Date	# Elections Allowed	Application Coding <i>If SEP, please include reason</i>
9	LIS <i>(Loss of Status)</i>	Has lost the Part D premium subsidy	<ul style="list-style-type: none"> ▪ Member Attestation ▪ Redetermination Letter ▪ SSA or Medicaid Award Letter <i>(if letter shows the actual levels)</i> ▪ Termination Notice 	<p>If loss of subsidy occurs at <u>end of calendar year</u>*:</p> <p>Begins January 1 Ends March 31</p> <p>If loss of subsidy occurs <u>mid-year</u>:</p> <p>Begins when notified of the loss Ends two months after notification</p> <p><i>* January 1 effective date is available if loss of subsidy occurs at the end of the calendar year.</i></p>	First day of the month following receipt of election.	1 Election* <i>*Enroll into PDP</i>	Code: SEP Reason: LIS (Loss of Status)
Institutionalized Consumers							
10	Institutionalized	Moves into or resides in Skilled Nursing Facility (SNF), nursing facility (NF), intermediate care facility for the mentally retarded, psychiatric hospital, rehabilitation hospital, Long Term Care (LTC) hospital, or swing-bed hospital with an expecting stay of at least 90 days.	<ul style="list-style-type: none"> ▪ Member Attestation ▪ Facility Address & Contact Info 	<p>Begins first day institutionalized</p> <p>Ends 2 months after discharge</p>	First day of the month following receipt of election.	Continuous* <i>*Enroll into PDP</i>	Code: SEP- Institutional

Election Period Details – Prescription Drug Plans (PDP)

#	Population	Qualification	Qualification Items <u>you can check</u> <i>Do not submit copies w/ application</i>	Time Frame	Effective Date	# Elections Allowed	Application Coding <i>If SEP, please include reason</i>
Consumers Who Move							
11	Change in Residence	<ul style="list-style-type: none"> ▪ Permanently moved inside plan’s service area with new plan options available ▪ Permanently moved outside plan’s service area ▪ Incarcerated individuals who have now been released 	<ul style="list-style-type: none"> ▪ Member Attestation ▪ New Address on Enrollment Form 	<p>Before Move Begins month before permanent move</p> <p>Ends 2 months after the move</p> <p>After Move Begins month consumer notified current plan of the move or the month the member was termed by the plan due to residing outside of the service area</p> <p>Ends 2 months after notification of move or after notification of Plan term</p>	First day of the month up to 3 months after receipt of election but not earlier than the day of move.	1 Election* *Enroll into PDP	<p>Code: SEP</p> <p>Reason: Change in Residence</p> <p><i>NOTE: Please ensure new address is entered on the application</i></p>
Loss of Coverage							
12	Involuntary Loss of Creditable Coverage	<ul style="list-style-type: none"> ▪ Involuntarily lost creditable coverage ▪ Coverage deemed no longer creditable <p><i>NOTE: Does NOT include loss of coverage due to nonpayment of premium</i></p>	<ul style="list-style-type: none"> ▪ Member Attestation ▪ Letter <i>stating loss of creditable coverage</i> 	<p>Begins either month of notice or month the loss or reduction of coverage occurs, whichever is later</p> <p>Ends 2 months later</p>	First day of the month following receipt of election or if consumer requests, up to 2 months from the end of the SEP.	1 Election* *Enroll into PDP	<p>Code: SEP</p> <p>Reason: Invol. Loss of Creditable Cvg</p>

Election Period Details – Prescription Drug Plans (PDP)

#	Population	Qualification	Qualification Items <u>you can check</u> <i>Do not submit copies w/ application</i>	Time Frame	Effective Date	# Elections Allowed	Application Coding <i>If SEP, please include reason</i>
Change in Employer Group Health Plan							
13	Loss of Employer Group Coverage <i>(Group Retiree, COBRA, & Commercial Coverage)</i>	Voluntary/involuntary termination of group coverage	<ul style="list-style-type: none"> ▪ Member Attestation ▪ Term Letter <i>from group or COBRA</i> ▪ Copy of email <i>from group attesting to disenrollment</i> 	Begins month group allows for disenrollment or date COBRA ends Ends 2 months after group coverage ends	Can choose an effective date up to 3 months in advance after receipt of election but not earlier than the first of the month following month in which the request is made.	1 Election* <i>*Enroll into PDP</i>	Code: SEP Reason: Loss of EGHP Coverage
14	Gain Employer Group Coverage	Gain or enroll into employer group coverage	<ul style="list-style-type: none"> ▪ Member Attestation ▪ Group Letter <i>describing coverage options</i> 	Begins month plan is open for enrollment (or as group allows) Ends 2 months after plan coverage takes effect	Employer Groups can choose an effective date up to 3 months in advance after receipt of election but not earlier than the first of the month following month in which the request is made.	1 Election* <i>*Enroll into PDP</i>	Code: SEP Reason: Group Retiree
Termination/Non-Renewal							
15	Non-Renewing	Plan no longer offered in area	<ul style="list-style-type: none"> ▪ Member Attestation ▪ Copy of Non-Renewal Notice 	Begins Dec 8 of that year Ends Last day of February of the following year	<ul style="list-style-type: none"> ▪ Enrollment request in December will have a January 1 effective date ▪ Enrollment request in January will have a February 1 effective date ▪ Enrollment request in February will have a March 1 effective date 	1 Election* <i>*Enroll into PDP</i>	Code: SEP Reason: Termination/non renewal
16	Non-Renewing Cost Plan	Cost Plan no longer offered in area	<ul style="list-style-type: none"> ▪ Member Attestation ▪ Copy of Non-Renewal Notice 	Begins Dec 8 of that year Ends Last day of February of the following year	<ul style="list-style-type: none"> ▪ Enrollment request in December will have a January 1 effective date ▪ Enrollment request in January will have a February 1 effective date ▪ Enrollment request in February will have a March 1 effective date 	1 Election* <i>*Enroll into PDP</i>	Code: SEP Reason: Cost

Election Period Details – Prescription Drug Plans (PDP)

#	Population	Qualification	Qualification Items <u>you can check</u> <i>Do not submit copies w/ application</i>	Time Frame	Effective Date	# Elections Allowed	Application Coding <i>If SEP, please include reason</i>
17	Termination of Plan Contract	Contract terminated with/without mutual consent of Medicare	<ul style="list-style-type: none"> • Member Attestation ▪ Copy of Termination Notice 	<p><u>With mutual consent</u> Begins 2 months before proposed termination date</p> <p>Ends 1 month after effective date of termination</p> <p><u>Without mutual consent</u> Begins 1 month before termination is effective</p> <p>Ends 2 months after effective date of termination</p>	<p><u>With Mutual Consent</u> First day of the month after notice received or up to 2 months after the effective date of termination but not earlier than receipt of election.</p> <p><u>Without Mutual Consent</u> First day of the month after notice received up to 3 months after month of termination but not earlier than receipt of election.</p>	1 Election* <i>*Enroll into PDP</i>	Code: SEP Reason: Contract non renewal
Other							
18	Enroll in a PDP during the MADP disenrollment period	MA enrollees using the Medicare Advantage Disenrollment Period (MADP) to disenroll from MA/MA-PD may request enrollment in a PDP <i>Note: MA Only PFFS members cannot use this SEP unless they submit a disenrollment request from the MA Only plan first.</i>	<ul style="list-style-type: none"> • Member Attestation • Complete enrollment application taken January 1 or later 	<p>Begins January 1</p> <p>Ends February 14</p>	First day of the month following receipt of election	1 Election* <i>*Enroll into PDP</i>	Code: SEP Reason: ADP
19	Retro Medicare Determination	Medicare entitlement verification is made retroactively	<ul style="list-style-type: none"> • Member Attestation ▪ Medicare Entitlement Letter 	<p>Begins month notice of entitlement is received</p> <p>Ends 3 months after month notice is received</p>	First of the month following receipt of the election	1 Election* <i>*Enroll into PDP</i>	Code: IEP

Election Period Details – Prescription Drug Plans (PDP)

#	Population	Qualification	Qualification Items <u>you can check</u> <i>Do not submit copies w/ application</i>	Time Frame	Effective Date	# Elections Allowed	Application Coding <i>If SEP, please include reason</i>
20	Retro ESRD Determination	Not Applicable for Prescription Drug Plans					
21	SPAP Members	Individuals who belong to a qualified SPAP	<ul style="list-style-type: none"> ▪ Member Attestation ▪ State Facilitation Letter 	One election per calendar year for SPAP members	First day of the month following receipt of election.	1 Election* <i>*Enroll into PDP</i> <i>*One election is allowed each subsequent calendar year for consumers who remain SPAP members.</i>	Code: SEP Reason: SPAP Enrollee
22	SPAP Loss of Eligibility	Members of qualified SPAPs who lose SPAP eligibility	<ul style="list-style-type: none"> ▪ Member Attestation ▪ Letter <i>attesting to loss of SPAP eligibility</i> 	Begins month the loss of eligibility notification is received Ends 2nd month after month notice is received	First day of the month following receipt of election.	1 Election* <i>*Enroll into PDP (Disenrollment from Part D not allowed)</i>	Code: SEP Reason: SPAP Enrollee
23	Chronic Condition	Not Applicable for Prescription Drug Plans					
24	Special Needs Status Change for Members of SNP	Disenrolled from SNP due to loss of special needs status	<ul style="list-style-type: none"> ▪ Member Attestation ▪ Letter <i>attesting to loss of special needs status</i> 	Begins month of effective date of disenrollment Ends 3 month after the date of involuntary disenrollment.	First day of the month following receipt of election.	1 Election* <i>*Enroll into PDP</i>	Code: SEP Reason: Loss of SNP Status
25	Chronic SNP Non-Eligibility	Consumer enrolled in a chronic SNP who is not verified for enrollment and is disenrolled two months after the effective date	<ul style="list-style-type: none"> ▪ Member Attestation ▪ Letter <i>attesting to non-eligibility for chronic SNP</i> 	Begins upon notification of non-eligibility Ends 2 months after month notice is received	First day of the month following receipt of election	1 Election* <i>*Enroll into PDP. Consumer cannot drop Part D.</i>	Code: SEP Reason: Chronic Non-Eligible

Election Period Details – Prescription Drug Plans (PDP)

#	Population	Qualification	Qualification Items <u>you can check</u> <i>Do not submit copies w/ application</i>	Time Frame	Effective Date	# Elections Allowed	Application Coding <i>If SEP, please include reason</i>
26	PACE	Consumer enrolling or disenrolling from PACE	<ul style="list-style-type: none"> ▪ Member Attestation ▪ PACE Enrollment Letter ▪ PACE Member ID Card 	<p>Begins the effective date of PACE disenrollment.</p> <p>Ends 2 months after effective date of PACE disenrollment to elect PDP plan.</p> <p>NOTE:</p> <ul style="list-style-type: none"> ▪ <i>May disenroll from plan at any time to enroll in PACE</i> 	First day of the month following receipt of election.	1 Election* <i>*Enroll into PDP</i>	Code: SEP Reason: PACE Switcher
27	Consumers disenrolling from a cost plan and the cost plan's optional supplemental Part D benefit	Disenrolling from a cost plan and the cost plan's optional supplemental Part D benefit into a Part D plan.	<ul style="list-style-type: none"> ▪ Member Attestation ▪ Letter <i>attesting to disenrollment from a Cost plan</i> 	<p>Begins the month of disenrollment</p> <p>Ends 2 months after disenrollment date</p>	First day of the month following receipt of election.	1 Election* <i>*Enroll into PDP</i>	Code: SEP Reason: Leaving Optional Part D Cost
28	Loss of Part B	Consumers involuntarily disenrolled from an MA-PD plan due to loss of Part B but continue to be entitled to Part A.	<ul style="list-style-type: none"> ▪ Member Attestation ▪ Letter <i>attesting to loss of Part B</i> 	<p>Begins upon notification of loss of Part B</p> <p>Ends 2 months after month notice is received</p>	First day of the month following receipt of election.	1 Election* <i>*Enroll into PDP</i>	Code: SEP Reason: Lost MA-PD and Part B

Election Period Details – Prescription Drug Plans (PDP)

#	Population	Qualification	Qualification Items <u>you can check</u> <i>Do not submit copies w/ application</i>	Time Frame	Effective Date	# Elections Allowed	Application Coding <i>If SEP, please include reason</i>
29	First Time MA Member (Age-In)	Enrolled in Medicare Advantage upon eligibility (age 65)	<p><i>* The consumer is not required to submit proof of entitlement. The plan is required to verify Medicare entitlement. This SEP only applies to consumers who enroll in an MA plan using their IEP at the time of their 65th birthday.</i></p> <ul style="list-style-type: none"> ▪ Member Attestation ▪ Medicare Entitlement Letter* ▪ Copy of Medicare ID Card or SSA Award Letter 	<p>Begins month enrolled in MA for first time</p> <p>Ends 12 months after effective date</p>	First day of the month following receipt of disenrollment request.	<p>1 Election*</p> <p><i>*Enroll into PDP if coming from MA-PD, or Disenroll into Original Medicare</i></p>	<p>Code: SEP</p> <p>Reason: SEP 65</p>
30	Consumers who drop Medigap and are in Trial Period	Consumers who dropped Medigap policy to enroll into an MA-PD plan for the first time and who are still in a "Trial Period"	<ul style="list-style-type: none"> ▪ Member Attestation ▪ Letter from previous Medigap policy <i>attesting to drop</i> 	<p>Begins the month enrolled into the MA-PD plan for the first time and extends for 12 months</p> <p>Ends two months after the MA-PD disenrollment takes effect</p>	First of the month following receipt of election	<p>1 Election*</p> <p><i>* PDP Only</i></p>	<p>Code: SEP</p> <p>Reason: Indiv drop Medigap – Trial Period</p>
31	Eligible for Other Creditable Coverage	Consumers currently enrolled in MA-PD or stand alone Part D plan are allowed to disenroll from their Part D Plan to obtain or maintain other types of creditable coverage, such as VA or Tricare for Life	<ul style="list-style-type: none"> ▪ Member Attestation ▪ Statement of Proof from <i>Other Coverage</i> 	<p>Begins immediately</p> <p>Ends date elected for disenrollment</p>	First day of the month following receipt of disenrollment request.	<p><i>Consumers have 1 election to disenroll into Original Medicare</i></p>	<p>N/A – Disenrollment election only</p>

Acronyms Used in This Booklet

Acronym	What it Stands For	Acronym	What it Stands For
AEP	Annual Election Period	MA-PD	Medicare Advantage-Prescription Drug Plan
CMS	Centers for Medicare & Medicaid Services	MSP	Medicare Savings Programs (<i>such as QMBs, SLMBs, & QIs</i>)
EGHP	Employer Group Health Plan	OEPI	Open Enrollment Period Institutional
ESRD	End-Stage Renal Disease	PACE	Program of All-Inclusive Care for the Elderly
GEP	General Enrollment Period	PDP	Prescription Drug Plan
HMO	Health Maintenance Organization	PFFS	Private Fee-For-Service
ICEP	Initial Coverage Election Period <i>(Consumer is first eligible to enroll in an MA plan)</i>	POS	Point of Service Plan
IEP2	Initial Election Period 2 <i>(Consumer is first eligible to enroll prior to the age of 65)</i>	PPO	Preferred Provider Organization
IEP-Part D	Initial Enrollment Period <i>(Consumer is first eligible to enroll in a Part D plan)</i>	SEP	Special Election Period
LIS	Low Income Subsidy	SNP	Special Needs Program
MADP	Medicare Advantage Disenrollment Period	SPAP	State Pharmaceutical Assistance Program
MA-Only	Medicare Advantage Plan without Prescription Drug coverage		

For more information on Medicare election periods, including those that do not pertain to UnitedHealthcare plans or products, please see www.cms.gov.

QUESTIONS?

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*Courtesy of:
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