

DEPARTMENT OF HEALTH & HUMAN SERVICES
Centers for Medicare & Medicaid Services
7500 Security Boulevard
Baltimore, Maryland 21244-1850



CENTER FOR DRUG and HEALTH PLAN CHOICE

TO: All Part D Plan Sponsors

FROM: Cynthia G. Tudor, Ph.D., Director, Medicare Drug Benefit and C & D Data Group
and Thomas Hutchinson, Director, Medicare Plan Payment Group

SUBJECT: Customer Service Representative Scripting Concerning Premium Withhold

DATE: October 23, 2009

In accordance with the provisions of the Machado v. Sebelius settlement agreement, CMS revised our internal scripts for 1-800 MEDICARE customer service representatives (CSRs) related to premium withhold. Previously, Medicare CSRs informed Medicare Part D beneficiaries that it may take up to 90 days from the date premium withhold was elected, or a change in Part D plan was made, for the correct premium amount to be withheld from the beneficiary's Social Security payment. With the revised scripting, the Medicare CSRs provide additional information to beneficiaries who contact 1-800 MEDICARE concerning premium withhold issues.

CSRs now advise beneficiaries to call 1-800 MEDICARE or his/her Part D plan after 90 days have elapsed since the beneficiary's last plan election or premium withhold change date, should they fail to see the desired change. Further, when CMS has the date of the beneficiary action affecting the withhold amount in our system, the CSR informs the beneficiary of the date when 90 days will have passed. When CMS does not have this date in our system, the CSR advises the beneficiary to contact 1-800 MEDICARE or his/her Part D plan after 90 days have elapsed since the beneficiary took the action affecting the withhold amount and recommends the beneficiary contact the plan to ensure the plan has a record of the relevant transaction and has taken appropriate steps to process it.

The purpose of this memorandum is to encourage Part D sponsors to provide similar information to Medicare enrollees who contact the plan regarding premium withhold issues. Specifically, Part D plan CSRs should recommend that beneficiaries call the plan back or contact 1-800 MEDICARE after the 90-day processing period has passed since either the beneficiary's last plan election or premium withhold change date, if the beneficiary fails to see the desired withholding (or termination of withholding) take effect and/or an appropriate refund is issued.

If you have any questions about this memorandum, please contact your Part D account manager.