



**MEDICARE ENROLLMENT & APPEALS GROUP**

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**DATE:** August 25, 2026

**TO:** All Medicare Advantage Organizations, Prescription Drug Plans, Cost Plans, Medicare-Medicaid Plans (MMPs), and PACE Organizations

**FROM:** Jennifer Smith  
Acting Director, Medicare Enrollment and Appeals Group  
Center for Medicare

**SUBJECT: Medicare Advantage and Part D Enrollment and Disenrollment Guidance**

This memo announces the release of the Medicare Advantage and Part D Enrollment and Disenrollment Guidance for CY 2027. Updates have been indicated in red font in the attached guidance documents and are summarized below.

MA and Part D guidance updates include:

- Updated citations throughout the guidance manual to reflect current regulatory references
- **Section 10:**
  - Revised definition of “lawfully present individual” – Section 1899C of the Act, which limits Medicare coverage to U.S. citizens or nationals and the following categories of eligible noncitizens: lawfully admitted permanent residents, Cuban and Haitian entrants, and Compact of Free Association residents. Additional guidance will be provided.
- **Section 30:**
  - Revised the discussion of enrollment capacity limits.
  - Corrected an error in IEP timeline example
  - Clarifying edits about the ICEP window, based on recent inquiries
  - Updates to SEPs that require prior CMS approval, based on codifications in CMS-4212-F
  - Correction to eligibility window for the SEP for individuals whose plan or contract is terminated/modified by mutual consent
- **Section 40:**
  - Added details about the required availability of paper enrollment forms under CMS marketing requirements
  - Revised passive enrollment requirements based on continued access to integrated care
- **Section 50:**
  - Revised discussion of enrollment capacity limit guidance
- **Section 60:**

- Added explanation of the start date of deemed continued eligibility
- Revised guidance about deemed continued eligibility for D-SNPs and cancellation of ineligible enrollments
- Added details about the notice of intent to request disenrollment for disruptive behavior

MA and Part D model exhibits and appendices updates include:

- **MA and Part D model enrollment form:** Updated expiration date to February 28, 2029
- **MA Exhibit 7 (Model Notice for MA Organization Denial of Enrollment):** Added denial reasons related to enrollment capacity limits and plans closed for new enrollments
- **MA Exhibit 24 (Model Notice for Medigap Rights Per Special Election Period):** Added Medigap plan types that individuals can buy with federal Medigap guaranteed issue rights
- **MA Exhibit 32 (Model Notice for Loss of Dual-Special Needs Status [Deeming Notice]):** Revised model notice
- **MA Exhibit 33 (Model Notice for Loss of D-SNP Status - Notification of Involuntary Disenrollment):** Revised model notice
- **MA Exhibit 39 (Model Notice to Confirm Default Enrollment):** Revised model notice for default enrollment
- **MA Exhibit 40 (Model Notice for Gaining D-SNP to Send to Individuals CMS Passively Enrolls from One Integrated D-SNP to Another Integrated D-SNP per 42 CFR 422.60(g) – 60 day notice):** Added new model notice
- **MA Exhibit 41 (Model Notice for Gaining D-SNP to Send to Individuals CMS Passively Enrolls from One Integrated D-SNP to Another Integrated D-SNP per 42 CFR 422.60(g) – 30 day notice):** Added new model notice

The final versions of the guidance chapters are attached. MA and Part D model forms, exhibits, and appendices are also attached.

The guidance and model forms, exhibits, and appendices will also be available on our webpages.

MA: <https://www.cms.gov/medicare/enrollment-renewal/managed-care-eligibility-enrollment>

Part D: <https://www.cms.gov/medicare/enrollment-renewal/part-d-plans>

LMI Mailbox: <https://enrollment.lmi.org/deepmailbox>

This release is intended to replace our existing enrollment guidance documents. This guidance is effective January 1, 2027.