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DATE: July 29, 2010

TO: All Medicare Advantage Organizations and Prescription Drug Plan Sponsors

FROM: Danielle R. Moon, J.D., M.P.A.
Director, Medicare Drug & Health Plan Contract Administration Group

SUBJECT: Guidelines for Agent and Broker Training and Testing for CY 2011

The purpose of this memorandum is to provide guidelines for Medicare Advantage organizations (MAOs) and prescription drug plan (PDP) sponsors to use in developing their curricula for training and testing agents and brokers for CY 2011. As we stated in our March 12, 2010 HPMS memorandum, our goal is to ensure that all agents and brokers selling Medicare products have a comprehensive and consistent understanding of Medicare rules in order for plans to fulfill requirements under 42 CFR 422.2274(b) - (c) and 423.2274(b) - (c) to annually train and test all agents and brokers selling Medicare products on Medicare rules, regulations and information on the plan products they intend to sell. These guidelines contain the minimum information that should be included in Medicare agent and broker training and testing programs for CY 2011. In addition to the required elements listed in the attached guidelines, MAOs, PDP sponsors and third-party training and testing vendors are permitted to include other relevant topics in their 2011 agent and broker training and testing programs (e.g., training on plan-specific products and fraud, waste and abuse).

We wish to again thank all MAOs and PDP sponsors for their continued commitment to ensuring that only agents and brokers who successfully complete training and testing and meet all other CMS requirements are permitted to sell Medicare products and provide Medicare beneficiaries with accurate and reliable information.

If you have any questions contact Camille Brown at Camille.Brown@cms.hhs.gov or 410-786-0274.