

MEDICARE DRUG AND HEALTH PLAN CONTRACT ADMINISTRATION GROUP

DATE: August 01, 2011

TO: All Medicare Advantage Organizations, Prescription Drug Plan Sponsors and Section 1876 Cost Plans

FROM: Danielle R. Moon, J.D., M.P.A., Director

SUBJECT: Guidelines for Agent and Broker Training and Testing for CY 2012

The purpose of this memorandum is to provide guidelines for Medicare Advantage organizations (MAOs), prescription drug plan (PDP) sponsors and Section 1876 Cost Plans to use in developing their curricula for training and testing agents and brokers for CY 2012. 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 the requirement 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 2012. In addition to the required elements listed in the attached guidelines, MAOs, PDP sponsors, Section 1876 Cost plans, and third-party training and testing vendors are permitted and encouraged to include other relevant topics in their 2012 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, PDP sponsors and Section 1876 Cost plans 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, please contact Melissa Moreno at Melissa.Moreno@cms.hhs.gov or 410-786-4790.