

HPMS E-Mail

Date: July 6, 2022

Subject: Updated Contract Year 2023 Agent Broker Training Testing Guidelines

CMS posted an updated contract year (CY) 2023 Agent Broker Training Testing Guidelines document on: [Marketing Models, Standard Documents, and Educational Material | CMS](#)

The update(s) are under 3. F. Personal/Individual Marketing Appointments. CMS added ii. (requirement to record all individual marketing/sales calls) and iii. (discussion of required disclaimers, including TPMO disclaimer that the agent/broker does not sell all products (if applicable)).

Additionally, we remind Medicare Advantage Organizations, Section 1876 Cost Contractors, Prescription Drug Plans, and Medicare-Medicaid Plans that they must adhere to CMS Compensation requirements. All organizations must notate whether agents/brokers are being used for CY2023, the types (e.g., independent, employed, captive), referral fees (if applicable), and compensation amounts for independent agents. This data must be submitted and attested to CMS by **11:59 p.m. ET, Friday July 29, 2022**.