



**MEDICARE DRUG AND HEALTH PLAN CONTRACT ADMINISTRATION GROUP**

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**DATE:** September 10, 2009

**TO:** All Medicare Advantage Organizations (MAO), Prescription Drug Plan (PDP) Sponsors, and Section 1876 Cost Plans

**FROM:** Teresa DeCaro, RN, M.S. /s/  
Acting Director

**SUBJECT: REVISED -** Release of the CMS 2010 Pilot Agent and Broker Training and Testing Module, and Technical Guidance on HPMS Report

As we relayed in our June 23, 2009, HPMS memorandum, CMS has developed an online training and testing module to be released as a pilot for CY 2010 and expanded for CY 2011. The CMS 2010 Pilot Agent and Broker Training and Testing Module was released to volunteer Medicare Advantage (MA) organizations and PDP sponsors on July 31, 2009. The pilot began on July 31, 2009, and will run through September 30, 2009. Although the pilot itself will conclude on September 30, 2009, the online tool will remain available to volunteer organizations beyond September 30, 2009, in order to facilitate continued training and testing for the sale of 2010 products. We remind all organizations and sponsors that they must recognize the certification received by agents and brokers through the CMS pilot regardless of whether they have elected to participate in the pilot.

The content of the training slides is accessible to all organizations and sponsors. CMS has posted the content of the training slides on the CMS website at [http://www.cms.hhs.gov/ManagedCareMarketing/09\\_MarketngModelsStandardDocumentsandEducationalMaterial.asp#TopOfPage](http://www.cms.hhs.gov/ManagedCareMarketing/09_MarketngModelsStandardDocumentsandEducationalMaterial.asp#TopOfPage).

In addition, on August 18, 2009, CMS released a new Status Details Report in HPMS to enable all organizations and sponsors to verify agent and broker testing certification results. This report is available at: HPMS Homepage > Monitoring > Agent/Broker Reports.

The Status Details Report contains data on the agents and brokers that have registered for the training and testing module and their current status in the module. The report will provide the following data elements:

- Agent/Broker Name
- NIPR Number
- License Number
- Plan Organization (based on parent organization name)
- Status (Complete or Incomplete)

- Status Date
- Score (%)
- Pass/Fail
- Certification Number

In addition, organizations and sponsors will be able to filter the report using the following criteria:

- Certification Number
- NIPR Number
- Plan Organization (based on parent organization name)
- License Number
- Status (Pass, Fail, and N/A)

When filtering by the plan organization field, a plan or sponsor user will only be able to select from a list of the parent organizations associated with the contracts assigned to the individual's CMS user ID.

For technical questions on accessing the new Status Details Report in HPMS, plan organizations should contact the HPMS Help Desk at either [hpms@cms.hhs.gov](mailto:hpms@cms.hhs.gov) or 1-800-220-2028.

We thank the organizations and sponsors that volunteered to be a part of the CMS pilot. We thank all organizations and 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.