



MEDICARE DRUG & HEALTH PLAN CONTRACT ADMINISTRATION GROUP

DATE: August 21, 2012

TO: 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 Broker Training and Testing for Contract Year 2013

This memorandum provides 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 contract year 2013. Our goal is to ensure that all agents and brokers selling Medicare products have a comprehensive and consistent understanding of Medicare rules. All plans are required to annually train and test that agents and brokers that sell 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 the training and testing programs. In addition to the minimum 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 (e.g., training on plan-specific products and fraud, waste and abuse).

We thank all MAOs, PDP sponsors, and Section 1876 Cost Plans for their continued commitment in ensuring that all agents and brokers complete the required training and testing and meet all other CMS requirements so they provide Medicare beneficiaries with accurate and reliable information.

If you have any questions, please contact your CMS Account Manager.