



MEDICARE DRUG & HEALTH PLAN CONTRACT ADMINISTRATION GROUP

DATE: July 8, 2013

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 2014

This memorandum provides guidelines for Medicare Advantage organizations (MAOs), prescription drug plans (PDP) sponsors, and Section 1876 Cost Plans to use in developing their curricula for training and testing agents and brokers for contract year (CY) 2014.

MAOs, PDP sponsors and Section 1876 Cost Plans are responsible for ensuring that all agents and brokers that sell Medicare products, including employees, subcontractors, downstream entities, and/or delegated entities, are trained and tested annually.

Agent and broker training and testing is a key component of a successful Medicare health or prescription drug plan. Agents and brokers must possess in-depth knowledge of Medicare health and drug plans, benefits and operations, and CMS regulations in order to ensure that they do not enroll beneficiaries inappropriately or provide misinformation about plan benefits. In order to ensure consistency and quality across all agent and broker training and testing programs, CMS provides guidelines to organizations offering MAO, PDP and Section 1876 Cost Contracts on an annual basis. The attached guidelines, updated for CY 2014, provide a summary of the elements that MAOs and PDP sponsors must include in their 2014 agent and broker training and testing program. In addition to the minimum required elements, 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. 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.