



### **Stay Compliant During OEP OEP Do's and Don'ts**

**Please review these important reminders to help you stay compliant during OEP.**

The annual open enrollment period (OEP) for Medicare Advantage (MA) has officially started. OEP takes place from January 1 to March 31. During this time, individuals enrolled in an MA plan can make a one-time election to switch to another MA plan (with or without Part D coverage) or return to Original Medicare (with or without Part D coverage).

It's important to know what to do and what not to do during OEP. To view the full Code of Federal Regulations, [click here](#).

#### **OEP Do's and Don'ts:**

<b>During OEP, you CAN</b>	<b>During OEP, you CANNOT</b>
<b>Market to age-ins who have not yet made an enrollment decision.</b>	Send unsolicited materials advertising or referencing OEP directly to your clientele.
<b>Send marketing materials when a client requests information.</b>	Purchase mailing lists or other identifying information to

	specifically target clientele during OEP.
<b>Conduct one-on-one meetings at the client's request.</b>	Engage in or promote activities intended to target OEP as an opportunity to make further sales.
<b>Provide information about OEP through the call center if a client asks.</b>	Call or otherwise contact clientele who selected a new plan during AEP.
<b>Market to dual-eligible and LIS beneficiaries who, in general, may enroll in a standalone Part D plan once a month.</b>	

**Please be sure to distribute this compliance bulletin to all agents in your hierarchy.**

**IMPORTANT NOTICE:** This compliance bulletin is intended strictly for licensed agent use only. Do not distribute to clients, prospects, or any unauthorized individuals.

