



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:

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

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

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.

