

OEP Marketing Guidelines



You CAN discuss OEP with the beneficiary if they:

- Proactively approach you as part of your usual conversations to determine eligibility
- Openly express dissatisfaction regarding enrollment into a plan they feel does not suit them and request assistance in finding a new plan
EX: They may not have sat with a professional to review their existing MA/MAPD, or made their AEP election online and did not fully understand the plan details
- Unknowingly changed plans during AEP and have requested a solution from you
- Express the cost of their newly joined plan is too high and they would like other options
- Feel they have made a poor decision because they were pressed for time during AEP and request assistance
- Have been prescribed a different medication that is not covered under their new plan and ask for help

You CANNOT discuss OEP with the beneficiary by:

- Knowingly targeting individuals who are eligible for an OEP and/or SEP election
- Utilizing the OEP period as an additional opportunity to make commissions
- Mentioning the OEP period to members who switched carriers during AEP, unless the beneficiary approaches you
- Posting flyers and/or distribute materials concerning OEP at events
- Probing and asking the beneficiary if they are happy with their health plan
- Asking if the beneficiary would consider switching to WellCare and then explaining OEP
- Outreach to existing clientele with the intention of educating them on the OEP