

Medicare Plan Enrollment/Election Periods Job Aid for Agents

ELECTION PERIOD	DESCRIPTION OF THE ENROLLMENT/ELECTION PERIOD	ELECTION TYPE CODE	SunFire Blaze Connect /Field Agent Option	ENROLLMENT WINDOW																																							
<p>IEP - Medical Coverage</p> <p>Initial Coverage Election Period - gaining Medicare A & B usually at the same time. Sometimes they are months apart this will still be IEP</p>	<p>ICEP is for Medical-only coverage (<u>MA-only</u>), not MAPD or PDP. The total enrollment period is seven (7) months beginning three (3) months before the individual's entitlement to Medicare Part A or enrollment into Medicare Part B, includes the month Medicare begins, and continues for three (3) additional months. If enrollment is during the three (3) months before the Medicare effective date, the plan effective date will be the same effective date as Medicare; otherwise, Effective date must be the 1st of next month or delayed up to three months</p>	<p>IEP</p> <p>7-month period to enroll into a MA ONLY</p>	<p>I'm new to Medicare</p>	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr style="background-color: red; color: white;"> <th style="width: 20%;">Birth month Or A & B effective dates</th> <th style="width: 80%;">Enrollment Window</th> </tr> </thead> <tbody> <tr><td>January</td><td>October 1 - April 30</td></tr> <tr><td>February</td><td>November 1 - May 31</td></tr> <tr><td>March</td><td>December 1 - June 30</td></tr> <tr><td>April</td><td>January 1 - July 31</td></tr> <tr><td>May</td><td>February 1 - August 31</td></tr> <tr><td>June</td><td>March 1 - September 30</td></tr> <tr><td>July</td><td>April 1 - October 31</td></tr> <tr><td>August</td><td>May 1 - November 30</td></tr> <tr><td>September</td><td>June 1 - December 31</td></tr> <tr><td>October</td><td>July 1 - January 31</td></tr> <tr><td>November</td><td>August 1 - February 29</td></tr> <tr><td>December</td><td>September 1 - March 31</td></tr> </tbody> </table>	Birth month Or A & B effective dates	Enrollment Window	January	October 1 - April 30	February	November 1 - May 31	March	December 1 - June 30	April	January 1 - July 31	May	February 1 - August 31	June	March 1 - September 30	July	April 1 - October 31	August	May 1 - November 30	September	June 1 - December 31	October	July 1 - January 31	November	August 1 - February 29	December	September 1 - March 31													
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<p>ICEP</p> <p>Delayed Part B while already has Part A</p>	<p>If a person has Medicare Part A and opted out of Medicare Part B when first eligible and then later enrolled in Part B, the ICEP would occur during the three (3) months prior to the effective date for Part B.</p>	<p>ICEP</p> <p>3-month period to enroll into a <small>MA/MAPD</small></p> <p>NOT for PDP.</p>	<p>I already have Hospital (Part A) and recently signed up for Medical (Part B). I want to join a Medicare Advantage Plan.</p>	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr style="background-color: red; color: white;"> <th style="width: 20%;">Part B Effective Date</th> <th style="width: 50%;">Enrollment Window</th> <th style="width: 30%;">Plan Effective Date</th> </tr> </thead> <tbody> <tr><td>January 1</td><td>October 1 - December 31</td><td>January 1</td></tr> <tr><td>February 1</td><td>November 1 - January 31</td><td>February 1</td></tr> <tr><td>March 1</td><td>December 1 - February 28/29</td><td>March 1</td></tr> <tr><td>April 1</td><td>January 1 - March 31</td><td>April 1</td></tr> <tr><td>May 1</td><td>February 1 - April 30</td><td>May 1</td></tr> <tr><td>June 1</td><td>March 1 - May 31</td><td>June 1</td></tr> <tr><td>July 1</td><td>April 1 - June 30</td><td>July 1</td></tr> <tr><td>August 1</td><td>May 1 - July 31</td><td>August 1</td></tr> <tr><td>September 1</td><td>June 1 - August 31</td><td>September 1</td></tr> <tr><td>October 1</td><td>July 1 - September 30</td><td>October 1</td></tr> <tr><td>November 1</td><td>August 1 - October 31</td><td>November 1</td></tr> <tr><td>December 1</td><td>September 1 - November 30</td><td>December 1</td></tr> </tbody> </table>	Part B Effective Date	Enrollment Window	Plan Effective Date	January 1	October 1 - December 31	January 1	February 1	November 1 - January 31	February 1	March 1	December 1 - February 28/29	March 1	April 1	January 1 - March 31	April 1	May 1	February 1 - April 30	May 1	June 1	March 1 - May 31	June 1	July 1	April 1 - June 30	July 1	August 1	May 1 - July 31	August 1	September 1	June 1 - August 31	September 1	October 1	July 1 - September 30	October 1	November 1	August 1 - October 31	November 1	December 1	September 1 - November 30	December 1
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<p>IEP - Prescription Coverage</p> <p>New to Medicare</p> <p>Initial Election Period - gaining Medicare A & B at the same time</p>	<p>This enrollment period is for Part D coverage (MAPD or PDP), not MA-only. The total enrollment period is seven (7) months beginning three (3) months before the effective date of Medicare Part A and B, includes the month Medicare begins, and continues for three (3) additional months.</p>	<p>IEP</p> <p>7-month period to enroll into a MAPD or PDP</p> <p>For Delayed Part B Refer to ICEP</p>	<p>I'm new to Medicare</p>	<table border="1"> <thead> <tr> <th>Birth month Or A & B effective dates</th> <th>Enrollment Window</th> </tr> </thead> <tbody> <tr><td>January</td><td>October 1 - April 30</td></tr> <tr><td>February</td><td>November 1 - May 31</td></tr> <tr><td>March</td><td>December 1 - June 30</td></tr> <tr><td>April</td><td>January 1 - July 31</td></tr> <tr><td>May</td><td>February 1 - August 31</td></tr> <tr><td>June</td><td>March 1 - September 30</td></tr> <tr><td>July</td><td>April 1 - October 31</td></tr> <tr><td>August</td><td>May 1 - November 30</td></tr> <tr><td>September</td><td>June 1 - December 31</td></tr> <tr><td>October</td><td>July 1 - January 31</td></tr> <tr><td>November</td><td>August 1 - February 29</td></tr> <tr><td>December</td><td>September 1 - March 31</td></tr> </tbody> </table>	Birth month Or A & B effective dates	Enrollment Window	January	October 1 - April 30	February	November 1 - May 31	March	December 1 - June 30	April	January 1 - July 31	May	February 1 - August 31	June	March 1 - September 30	July	April 1 - October 31	August	May 1 - November 30	September	June 1 - December 31	October	July 1 - January 31	November	August 1 - February 29	December	September 1 - March 31
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<p>AEP - Annual Enrollment Period 10/15 - 12/07 annually</p>	<p>During AEP, beneficiaries may choose how they receive their Medicare benefits for the upcoming year. The last election made, determined by the application date, will be the plan that takes effect on January 1.</p> <p>The Annual Enrollment Period is open for all plan types: MA, MAPD and PDP, but <u>excludes Medicare Supplements.</u></p>	<p>AEP</p> <p>Enroll into a MA MAPD or PDP with a Jan. 1 plan effective date</p>	<p>AEP: Annual election period</p>	<p>Enrollment Period:</p> <p>The enrollment period is from October 15 to December 7.</p>																										
<p>(MA) OEP</p> <p>Open Enrollment Period 01/01 - 03/31 annually</p>	<p>Beneficiaries already enrolled in a Medicare Advantage plan (MA/MAPD) may make one plan change during the first three (3) months of each year (1/1-3/31) to enroll in another Medicare Advantage plan OR to disenroll to obtain Original Medicare (and get a PDP). The effective date will be the first day of the month following receipt of the enrollment or disenrollment request. MA/MAPD members NOT required to have made an election during AEP.</p> <p>NOT permitted to have Original Medicare to enroll in MA/MAPD or change PDP</p>	<p>OEP</p> <p>Enroll into a different MA MAPD from a MA MAPD</p>	<p>I'm in a Medicare Advantage Plan and want to make a change (before 4/1) or I've had Medicare for less than 3 months and I want to make a change (after 4/1).</p>	<p>Enrollment Period:</p> <p>The enrollment period is from January 1 to March 31.</p>																										

<p>(MA) OEP-New - Open Enrollment Period The month of Medicare entitlement and for 2 additional months following IEP/ICEP enrollment into MA/MAPD</p>	<p>OEP is available to new Medicare Advantage enrollees following IEP/ICEP with their Medicare entitlement. The one-time election begins the month of entitlement (effective date) to Part A and Part B and for two additional months. NOTE: Beneficiaries who wait to use their IEP/ICEP until the month of their Medicare effective date or later during that initial seven-month window will reduce or even forfeit their OEP. NOT permitted to have Original Medicare to enroll in MA/MAPD or change PDP.</p>	<p>OEP New Enroll in a different MA/MAPD from MA/MAPD</p>	<p>I'm in a Medicare Advantage Plan and want to make a change (before 4/1) or I've had Medicare for less than 3 months and I want to make a change (after 4/1).</p>	<p>Enrollment Window: The month of Medicare entitlement and for 2 additional months following IEP/ICEP enrollment into MA/MAPD</p>																										
<p>LT2 Open Enrollment Institutional When moving into, residing in for MA/MAPD</p>	<p>This is an open and unlimited use enrollment period for Medicare beneficiaries residing in an institution. An "institution" is defined as a skilled nursing facility, nursing home, intermediate care facility for the mentally disabled, psychiatric hospital, rehabilitation hospital or long term care hospital (it does NOT include assisted living facilities or residential homes).</p>	<p>LT2 Enroll into a MA or MAPD SEP is NOT for PDP.</p>	<p>I live in a long-term care facility, like a nursing home or a rehabilitation hospital</p>	<p>Open and unlimited use enrollment period Valid as long as the beneficiary resides in the long-term facility</p>																										
<p>SEP: MOV New Move Permanent Move out of service area</p>	<p>SEP available for permanent change of residence. Can complete application the month prior to the permanent move and up to 2 months after the move. The effective date may NOT be earlier than the date of permanent move. May enroll in any plan for which the beneficiary is eligible in the new service area, regardless of coverage in former service area. Individuals who move and have new Medicare health or Part D plans available to them as a result of the move, but continue to reside in the current plan service area, may use this SEP to enroll in a different plan. Zip code or county must change.</p>	<p>SEP: MOV Enroll into MA MAPD or PDP</p>	<p>I recently moved outside of the service area for my current plan or I recently moved and this plan is a new option for me.</p>	<table border="1"> <thead> <tr> <th>Month of Move</th> <th>Enrollment Window</th> </tr> </thead> <tbody> <tr> <td>January</td> <td>December 1 - March 31</td> </tr> <tr> <td>February</td> <td>January 1 - April 30</td> </tr> <tr> <td>March</td> <td>February 1 - May 31</td> </tr> <tr> <td>April</td> <td>March 1 - June 30</td> </tr> <tr> <td>May</td> <td>April 1 - July 31</td> </tr> <tr> <td>June</td> <td>May 1 - August 31</td> </tr> <tr> <td>July</td> <td>June 1 - September 30</td> </tr> <tr> <td>August</td> <td>July 1 - October 31</td> </tr> <tr> <td>September</td> <td>August 1 - November 30</td> </tr> <tr> <td>October</td> <td>September 1 - December 31</td> </tr> <tr> <td>November</td> <td>October 1 - January 31</td> </tr> <tr> <td>December</td> <td>November 1 - February 28</td> </tr> </tbody> </table>	Month of Move	Enrollment Window	January	December 1 - March 31	February	January 1 - April 30	March	February 1 - May 31	April	March 1 - June 30	May	April 1 - July 31	June	May 1 - August 31	July	June 1 - September 30	August	July 1 - October 31	September	August 1 - November 30	October	September 1 - December 31	November	October 1 - January 31	December	November 1 - February 28
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SEP: RUS Individual had moved out of the U.S. and now moved back	Individuals who were not eligible for a MA or PDP because they had been out of the U.S. and have now moved back The SEP begins on the actual date of the move or with the date the individual provides notification of such move and continues for two additional calendar months.	SEP: RUS Enroll into MA MAPD or PDP	I recently returned to the United States after living permanently outside the U.S.	<table border="1"> <thead> <tr> <th>Month of move</th> <th>Enrollment Window</th> </tr> </thead> <tbody> <tr><td>January</td><td>January 1 - March 31</td></tr> <tr><td>February</td><td>February 1 - April 30</td></tr> <tr><td>March</td><td>March 1 - May 31</td></tr> <tr><td>April</td><td>April 1 - June 30</td></tr> <tr><td>May</td><td>May 1 - July 31</td></tr> <tr><td>June</td><td>June 1 - August 31</td></tr> <tr><td>July</td><td>July 1 - September 30</td></tr> <tr><td>August</td><td>August 1 - October 31</td></tr> <tr><td>September</td><td>September 1 - November 30</td></tr> <tr><td>October</td><td>October 1 - December 31</td></tr> <tr><td>November</td><td>November 1 - January 31</td></tr> <tr><td>December</td><td>December 1 - February 28</td></tr> </tbody> </table>	Month of move	Enrollment Window	January	January 1 - March 31	February	February 1 - April 30	March	March 1 - May 31	April	April 1 - June 30	May	May 1 - July 31	June	June 1 - August 31	July	July 1 - September 30	August	August 1 - October 31	September	September 1 - November 30	October	October 1 - December 31	November	November 1 - January 31	December	December 1 - February 28
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SEP: INC Individuals who were incarcerated and now have been released	The SEP begins on the actual date of the release from incarceration or with the date the individual provides notification of such move and continues for two additional calendar months	SEP: INC Enroll into MA MAPD or PDP	I recently was released from incarceration.	<table border="1"> <thead> <tr> <th>Month Released</th> <th>Enrollment Window</th> </tr> </thead> <tbody> <tr><td>January</td><td>January 1 - March 31</td></tr> <tr><td>February</td><td>February 1 - April 30</td></tr> <tr><td>March</td><td>March 1 - May 31</td></tr> <tr><td>April</td><td>April 1 - June 30</td></tr> <tr><td>May</td><td>May 1 - July 31</td></tr> <tr><td>June</td><td>June 1 - August 31</td></tr> <tr><td>July</td><td>July 1 - September 30</td></tr> <tr><td>August</td><td>August 1 - October 31</td></tr> <tr><td>September</td><td>September 1 - November 30</td></tr> <tr><td>October</td><td>October 1 - December 31</td></tr> <tr><td>November</td><td>November 1 - January 31</td></tr> <tr><td>December</td><td>December 1 - February 28</td></tr> </tbody> </table>	Month Released	Enrollment Window	January	January 1 - March 31	February	February 1 - April 30	March	March 1 - May 31	April	April 1 - June 30	May	May 1 - July 31	June	June 1 - August 31	July	July 1 - September 30	August	August 1 - October 31	September	September 1 - November 30	October	October 1 - December 31	November	November 1 - January 31	December	December 1 - February 28
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SEP: LEC Loss of employer group or union coverage	This SEP is for individuals who are losing group health coverage (including COBRA). Losses include the individual opting out of the Company/Group coverage during the employer's annual benefit selection season, changes due to life events and discontinuation of employment or the Company/Group ceases to offer group health coverage. SEP is the month prior, month of and 2 additional months	SEP: LEC Enroll into MA MAPD or PDP	I'm leaving employer or union coverage	<table border="1"> <thead> <tr> <th>Month Lost employer coverage</th> <th>Enrollment Window</th> </tr> </thead> <tbody> <tr><td>January</td><td>December 1 - March 31</td></tr> <tr><td>February</td><td>January 1 - April 30</td></tr> <tr><td>March</td><td>February 1 - May 31</td></tr> <tr><td>April</td><td>March 1 - June 30</td></tr> <tr><td>May</td><td>April 1 - July 31</td></tr> <tr><td>June</td><td>May 1 - August 31</td></tr> <tr><td>July</td><td>June 1 - September 30</td></tr> <tr><td>August</td><td>July 1 - October 31</td></tr> <tr><td>September</td><td>August 1 - November 30</td></tr> <tr><td>October</td><td>September 1 - December 31</td></tr> <tr><td>November</td><td>October 1 - January 31</td></tr> <tr><td>December</td><td>November 1 - February 28</td></tr> </tbody> </table>	Month Lost employer coverage	Enrollment Window	January	December 1 - March 31	February	January 1 - April 30	March	February 1 - May 31	April	March 1 - June 30	May	April 1 - July 31	June	May 1 - August 31	July	June 1 - September 30	August	July 1 - October 31	September	August 1 - November 30	October	September 1 - December 31	November	October 1 - January 31	December	November 1 - February 28
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<p>SEP: LCC</p> <p>Involuntary Loss of Creditable Prescription Drug Coverage</p>	<p>Involuntary loss of creditable coverage, including a reduction in the level of coverage so that it is no longer creditable, NOT including any loss or reduction due to a failure to pay premiums.</p> <p>The SEP permits enrollment in a MAPD/PDP and begins with Month of notification and 2 additional months</p>	<p>SEP: LCC</p> <p>Enroll into MAPD or PDP</p>	<p>I recently involuntarily lost my creditable prescription drug coverage</p>	<table border="1"> <thead> <tr> <th>Month of Notification</th> <th>Enrollment Window</th> </tr> </thead> <tbody> <tr><td>January</td><td>January 1 - March 31</td></tr> <tr><td>February</td><td>February 1 - April 30</td></tr> <tr><td>March</td><td>March 1 - May 31</td></tr> <tr><td>April</td><td>April 1 - June 30</td></tr> <tr><td>May</td><td>May 1 - July 31</td></tr> <tr><td>June</td><td>June 1 - August 31</td></tr> <tr><td>July</td><td>July 1 - September 30</td></tr> <tr><td>August</td><td>August 1 - October 31</td></tr> <tr><td>September</td><td>September 1 - November 30</td></tr> <tr><td>October</td><td>October 1 - December 31</td></tr> <tr><td>November</td><td>November 1 - January 31</td></tr> <tr><td>December</td><td>December 1 - February 28</td></tr> </tbody> </table>	Month of Notification	Enrollment Window	January	January 1 - March 31	February	February 1 - April 30	March	March 1 - May 31	April	April 1 - June 30	May	May 1 - July 31	June	June 1 - August 31	July	July 1 - September 30	August	August 1 - October 31	September	September 1 - November 30	October	October 1 - December 31	November	November 1 - January 31	December	December 1 - February 28
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<p>SEP: 12J</p> <p>Enrolled in a MA/MAPD during the IEP/ICEP at 65th birthday and dropping it within 1st 12 months to choose PDP</p>	<p>12J - Enrolled in MAPD coverage surrounding 65th birthday and would like to return to Original Medicare and enroll in a PDP (PDP only)</p>	<p>SEP: 12J</p> <p>Enroll into PDP only</p>	<p>In the last 12 months, I joined a Medicare Advantage plan with prescription drug coverage when I turned 65.</p>	<p>12 months after ICEP/IEP enrollment</p>																										
<p>SEP: 12G</p> <p>Trial Period: Individuals who dropped a Medicare Supplement plan after enrolling in a MA/MAPD for the First Time</p>	<p>This SEP is for individuals who dropped a Medicare Supplement (Medigap) plan after enrolling in an MA/MAPD for the first time, and who are still within 12 calendar months of that first MA/MAPD enrollment, i.e., Trial Period. During this Trial Period SEP, the individual can elect to disenroll from the MA/MAPD, return to Original Medicare (with or without a PDP).</p>	<p>SEP: 12G</p> <p>Enroll into PDP only</p>	<p>I dropped a Medicare Supplement plan after enrolling in a MA/MAPD for the first time within the last 12-months (36-months for Maine)</p>	<p>12 months after disenrolling from Medicare Supplement Plan and enrolling in an MA/MAPD plan</p>																										

SEP: PAC

Program of All-inclusive Care for the Elderly (PACE)

Individuals who disenroll from PACE have a SEP for up to two calendar months after the effective date of the PACE disenrollment to enroll in a MA, MAPD or PDP.

SEP: 2 months after PACE disenrollment

Individuals may disenroll from MA/MAPD/PDP at any time to enroll in Program of All-inclusive Care for the Elderly (PACE).

SEP: PAC

Enroll into MA MAPD or PDP

I recently 'left' a Programs of All-Inclusive Care for the Elderly program

PACE Disenrollment	Enrollment Period
January	January 1 - March 31
February	February 1 - April 30
March	March 1 - May 31
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SEP: PAP

Qualified State Pharmaceutical Assistance Program (SPAP) Members

Individuals who belong to a qualified SPAP are eligible for an SEP to make one enrollment request at any time once per year.

SPAP members may use this SEP to enroll in a Part D plan outside of existing enrollment opportunities, allowing them, for example, to join a Part D plan upon becoming a member of an SPAP or to switch to another Part D plan.

SEP: PAP

Enroll into MAPD or PDP

NOT MA only

I belong to a pharmacy assistance program provided by my state, or I am losing or recently lost participation in such a program

Enrollment Period:

Members can enroll once during the calendar year.

SEP:RET

Retroactive Entitlement

For an individual who has not been provided the opportunity to enroll in a plan during their ICEP/IEP, perhaps due to administrative delays.

These individuals will have a SEP to enroll in a plan that begins the month the individual receives the notice of the Medicare entitlement retroactive determination and continues for two (2) additional months after the month the notice is provided.

Effective date must be the 1st of next month.

SEP: RET

Enroll into MAPD MA PDP

I'm new to Medicare, and I was notified about getting Medicare after my Part A and/or Part B coverage started

Month of Notification	Enrollment Window
January	January 1 - March 31
February	February 1 - April 30
March	March 1 - May 31
April	April 1 - June 30
May	May 1 - July 31
June	June 1 - August 31
July	July 1 - September 30
August	August 1 - October 31
September	September 1 - November 30
October	October 1 - December 31
November	November 1 - January 31
December	December 1 - February 28

<p>SEP: OCC</p> <p>Individuals who disenroll from Part D to enroll in or maintain other creditable coverage</p>	<p>Individuals enrolled in a PDP or MAPD may disenroll to enroll or maintain other creditable drug coverage such as TriCare or VA coverage by using this SEP to enroll in a MA-only plan.</p> <p>OCC- Disenrolling from PDP OR MAPD to enroll in or maintain other creditable coverage (MA only)</p>	<p>SEP: OCC</p> <p>Enroll into MA-only</p>	<p>I want to enroll in a Medical only plan to maintain other creditable coverage</p>	<p>Individual in a PDP/MAPD may use this to enroll in an MA only plan and a TriCare/VA plan</p> <p>will have <u>two</u> months following disenrollment of MAPD/PDP to select a MA-only plan.</p>
<p>SEP: NON/MYT</p> <p>Contract Not Renewed</p> <p>MA/MAPD /PDP Contract non-renewal of plan effective Jan. 1</p>	<p>For members of a MA/MAPD/PDP plan that will be affected by contract non-renewal (PLEX - Plan Exit) or service area reduction (plan no longer available in zip or county) for the upcoming plan year. The SEP begins December 8 and ends on the last day of February with effective date the first day of the upcoming month following enrollment.</p> <p>NOTE: Approved plan consolidations (also known as plan cross-walk or migration) are NOT plan exits, terminations or non-renewals, thus NOT eligible for the SEP for non-renewal. Humana (NON)</p>	<p>SEP: NON/MYT</p> <p>Enroll into MA MAPD or PDP For use 12/8 - end of Feb</p>	<p>I lost my coverage because Medicare ended its contract with my plan. I got a letter from Medicare saying I could join another plan.</p>	<p>For use 12/8 - end of Feb.</p>

**SEP:
IEP 2**

2nd IEP for
beneficiaries
who have
Medicare due to
disability upon
turning age 65

For beneficiaries who were entitled to Medicare prior to 65th birthday who want to enroll in an MA, MAPD or PDP plan surrounding their 65th birthday
2nd IEP

2nd IEP (MA,MAPD and PDP)

**SEP:
IEP 2**

Enroll into MA MAPD PDP

I had Medicare prior to now, but I'm now turning 65

Birth month	Enrollment Window
January	October 1 - April 30
February	November 1 - May 31
March	December 1 - June 30
April	January 1 - July 31
May	February 1 - August 31
June	March 1 - September 30
July	April 1 - October 31
August	May 1 - November 30
September	June 1 - December 31
October	July 1 - January 31
November	August 1 - February 29
December	September 1 - March 31

**SEP:
SNP**

Loss of Special Needs Status

"CMS provides a SEP for individuals enrolled in a SNP who are no longer eligible for the SNP because they no longer meet the specific special needs status."

SEP: Month of notification and 3 additional months

**SEP:
SNP**

Enroll into MA, MAPD or PDP

I lost my Special Needs Plan because I no longer have a condition required for that plan

Month of Notification	Enrollment Window
January	January 1 - April 30
February	February 1 - May 31
March	March 1 - June 30
April	April 1 - July 31
May	May 1 - August 31
June	June 1 - September 30
July	July 1 - October 31
August	August 1 - November 30
September	September 1 - December 31
October	October 1 - January 31
November	November 1 - February 28
December	December 1 - March 31

**SEP:
CSN**

Chronic Condition Enrollment into a Chronic Care SNP

This SEP is for those individuals with severe or disabling chronic conditions to enroll in a CC-SNP designed to serve individuals with those conditions. This SEP will apply as long as the individual has the qualifying condition and will end once they enroll in a CC-SNP. Once the SEP ends, they may make enrollment changes only during AEP or other eligible election periods.

**SEP:
CSN**

Enroll into CC-SNP

I want to join a Special Needs Plan that tailors its benefits to my chronic condition.

Valid as long as the beneficiary has a qualifying chronic condition (may be used once)

**SEP:
MDE**

Dual-Eligible Individuals Medicare & Medicaid and Other LIS Eligible

Individuals who have Medicare A and B and receive any type of Federal or State assistance from Medicaid or Low Income Subsidy (LIS) Extra Help (due to financial reasons), including Full Benefit Dual Eligible (FBDE), QMB, QMB+, SLMB, SLMB+, QI, the Medicare Savings Program, or are only eligible for LIS have a one time per calendar quarter SEP between January through September.

This SEP may NOT be used during the fourth quarter of the year (Oct-Dec).

**SEP:
MDE**

Enroll into MA, MAPD or PDP

I have both Medicare and Medicaid (or my state helps pay for my Medicare premiums) or I get Extra Help paying for my Medicare prescription drug coverage, but I haven't had a change. Note: This SEP is only valid once per calendar quarter from January 1 through September 30.

Members can enroll one time during each of these quarters:

- **January–March**
- **April–June**
- **July–September**

Jan 1st - Sept. 30th, may be used once per quarter

**SEP:
MCD**

Who Gain, Lose or Have a Change in their Medicaid Status

Individuals who Gain, Lose or Have a Change in their Medicaid (Dual Eligible) Status have a SEP which includes those who:

- Become eligible for any type of assistance from the Title XIX program (including “partial duals” who receive cost sharing assistance under Medicaid); or
- Lose eligibility for any type of assistance; or
- Have a change in the level of assistance they receive (e.g., stop receiving Medicaid benefits, but still qualify for LIS, those who have a change in cost sharing).

Use of this SEP does NOT count towards the once per calendar quarter limitation,

**SEP:
MCD**

Enroll into MA, MAPD or PDP

I recently had a change in my Medicaid (newly got Medicaid, had a change in level of Medicaid assistance, or lost Medicaid).

Month of Medicaid Change	Enrollment Period
January	January 1 - March 31
February	February 1 - April 30
March	March 1 - May 31
April	April 1 - June 30
May	May 1 - July 31
June	June 1 - August 31
July	July 1 - September 30
August	August 1 - October 31
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November	November 1 - January 31
December	December 1 - February 28

**SEP:
INV**

Disenrolled from MAPD due to loss of Part B

Individuals who are involuntarily disenrolled from a MAPD plan due to loss of Part B (failure to pay part B premium), but who continue to be entitled to Part A have a SEP to enroll in a PDP.

This SEP begins when the individual is advised of the loss of Part B continues for two (2) additional calendar months

**SEP:
INV**

Enroll into PDP Only

I lost my Medicare Advantage Plan with drug coverage because I lost Medical (Part B) coverage. I want to join a Medicare drug plan.

Month of Losing Part B	Enrollment Period
January	January 1 - March 31
February	February 1 - April 30
March	March 1 - May 31
April	April 1 - June 30
May	May 1 - July 31
June	June 1 - August 31
July	July 1 - September 30
August	August 1 - October 31
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**SEP:
MRD**

2nd IEP Age-in for beneficiaries who have Medicare due to disability upon turning 65

An individual eligible for an additional Part D IEP, such as an individual currently entitled to Medicare due to a disability and who is attaining age 65.

The SEP may be used to enroll in a MAPD or PDP.

The SEP begins three months before month of 65th birthday, continues through birth month and for three additional months (7 month enrollment period).

This SEP is for use one time only per beneficiary.

Humana MRD is for MA only. IEP SEP, IEP2 EP will convert to MRD sepCode

**SEP:
MRD**

To enroll in MAPD or PDP

FOR MA only use IEP in blaze

I had Medicare before, but I'm now turning 65.

Birth month	Enrollment Window
January	October 1 - April 30
February	November 1 - May 31
March	December 1 - June 30
April	January 1 - July 31
May	February 1 - August 31
June	March 1 - September 30
July	April 1 - October 31
August	May 1 - November 30
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**SEP:
NLS**

Who Gain, Lose or Have a Change in their LIS Status

Individuals who Gain, Lose or Have a Change in their LIS-Eligible Status

NOTE: Use of this SEP does NOT count towards the once per calendar quarter limitation

SEP lasts for three months after the member is notified of their loss of LIS/extra help.

**SEP:
NLS**

Enroll into MA, MAPD or PDP

I recently had a change in my Extra Help paying for Medicare prescription drug coverage (new got Extra Help, had a change in the level of Extra Help, or lost Extra Help).

Month of LIS Change	Enrollment Window
January	January 1 - April 30
February	February 1 - May 31
March	March 1 - June 30
April	April 1 - July 31
May	May 1 - August 31
June	June 1 - September 30
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**SEP:
DIF**

For CMS and State Initiated Enrollments

(Passive Enrollments, etc.)

Individuals who are enrolled into a plan by CMS or a State and want to choose a different plan

SEP is within three months of effective date of CMS or State assignment

**SEP:
DIF**

Enroll into MA, MAPD or PDP

I was enrolled in a plan by Medicare (or my state) and I want to choose a different plan

Within three months of effective date of CMS or State assignment

OEP**Open Enrollment Period**

Beneficiaries already enrolled in a Medicare Advantage plan (MA/MAPD) may make one plan change during the first three (3) months of each year (1/1-3/31)

OR to disenroll to obtain Original Medicare (and get a PDP)

in a Medicare Advantage Plan and want to make a change (before 4/1) or had Medicare for less than 3 months and want to make a change (after 4/1).

OEP**Enroll into MA MAPD PDP**

I'm in a Medicare Advantage Plan and want to make a change (before 4/1) or I've had Medicare for less than 3 months and I want to make a change (after 4/1).

Jan 1st - March 31st**SEP: LTC****Institutionalized Individuals**

(Assisted Living Facilities are NOT considered Institutions)

Beneficiary has recently left institutional living (Nursing facility, Intermediate Care Facility)

SEP: Two months after moving out of long-term facility

SEP: LTC**Enroll into MA/ MAPD****NOT for PDP**

I am moving into, live in, or recently moved out of a long-term care facility (for example, a nursing home or long term care facility).

Month Left Institution	Enrollment Window
January	January 1 - March 31
February	February 1 - April 30
March	March 1 - May 31
April	April 1 - June 30
May	May 1 - July 31
June	June 1 - August 31
July	July 1 - September 30
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December	December 1 - February 28

SEP: LAW**Non-U.S. Citizens who become Lawfully Present**

CMS provides a SEP for non-U.S. citizens who become lawfully present in the United States.

Applicants are NOT required to provide evidence of U.S. citizenship or lawful presence with the enrollment request and plans are NOT permitted to request/require such documentation.

SEP: Month of lawful presence and two addt months

Effective date must be the 1st of next month or delayed up to three months

SEP: LAW**Enroll into MA, MAPD PDP**

I recently obtained lawful presence status in the United States.

Month of Lawful Presence	Enrollment Window
January	January 1 - March 31
February	February 1 - April 30
March	March 1 - May 31
April	April 1 - June 30
May	May 1 - July 31
June	June 1 - August 31
July	July 1 - September 30
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December	December 1 - February 28

<p>SEP: 5ST</p> <p>To Enroll in a plan with a Five (5) Star Rating</p>	<p>A Medicare beneficiary may enroll in a MA/MAPD/PDP that has an overall Plan Rating of five (5) Stars. The plan effective date must be during the year in which that plan has the 5-Star rating and the enrollee must meet all other plan eligibility requirements.</p>	<p>SEP: 5ST</p> <p>Enroll into MA/MAPD PDP</p>	<p>I am enrolling in a 5-star Medicare plan.</p>	<p>This SEP is a one-time use per contract year.</p> <p>The enrollment effective date is the first of the month following the month in which the plan receives the enrollment request.</p> <p>Use ONLY between 12/8 - 11/30</p>
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<p>SEP - DST</p> <p>Government Entity Declared Disaster or Other Emergency</p>	<p>Affected by an emergency or major disaster (as declared by the Federal Emergency Management Agency (FEMA) or by a Federal, state or local government entity.</p> <p>SEP Starts as of the date the declaration is made and two additional months.</p> <p>Only valid if the beneficiary didn't use any other election periods during this time</p>	<p>SEP: DST</p> <p>Enroll into MA, MAPD or PDP</p>	<p>I was affected by an emergency or major disaster (as declared by the Federal Emergency Management Agency (FEMA) or by a Federal, state or local government entity. One of the other statements here applied to me, but I was unable to make my enrollment request because of the disaster.</p>	<table border="1"> <thead> <tr> <th>Declaration Month</th> <th>Enrollment Period</th> </tr> </thead> <tbody> <tr><td>January</td><td>January 1 - March 31</td></tr> <tr><td>February</td><td>February 1 - April 30</td></tr> <tr><td>March</td><td>March 1 - May 31</td></tr> <tr><td>April</td><td>April 1 - June 30</td></tr> <tr><td>May</td><td>May 1 - July 31</td></tr> <tr><td>June</td><td>June 1 - August 31</td></tr> <tr><td>July</td><td>July 1 - September 30</td></tr> <tr><td>August</td><td>August 1 - October 31</td></tr> <tr><td>September</td><td>September 1 - November 30</td></tr> <tr><td>October</td><td>October 1 - December 31</td></tr> <tr><td>November</td><td>November 1 - January 31</td></tr> <tr><td>December</td><td>December 1 - February 28</td></tr> </tbody> </table>	Declaration Month	Enrollment Period	January	January 1 - March 31	February	February 1 - April 30	March	March 1 - May 31	April	April 1 - June 30	May	May 1 - July 31	June	June 1 - August 31	July	July 1 - September 30	August	August 1 - October 31	September	September 1 - November 30	October	October 1 - December 31	November	November 1 - January 31	December	December 1 - February 28
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<p>EOC</p> <p>plan is ending its contract with Medicare</p>	<p>Lost coverage because the plan no longer covers the area that I live or it ended its contract with Medicare.</p> <p>SEP is Two months before termination, month of and one month after event date</p>	<p>EOC</p> <p>Enroll into MA, MAPD or PDP</p>	<p>My plan is ending its contract with Medicare.</p>	<table border="1"> <thead> <tr> <th>Termination month</th> <th>Enrollment Window</th> </tr> </thead> <tbody> <tr><td>January</td><td>November 1 - February 28</td></tr> <tr><td>February</td><td>December 1 - March 31</td></tr> <tr><td>March</td><td>January 1 - April 30</td></tr> <tr><td>April</td><td>February 1 - May 31</td></tr> <tr><td>May</td><td>March 1 - June 30</td></tr> <tr><td>June</td><td>April 1 - July 31</td></tr> <tr><td>July</td><td>May 1 - August 31</td></tr> <tr><td>August</td><td>June 1 - September 30</td></tr> <tr><td>September</td><td>July 1 - October 31</td></tr> <tr><td>October</td><td>August 1 - November 30</td></tr> <tr><td>November</td><td>September 1 - December 31</td></tr> <tr><td>December</td><td>October 1 - January 31</td></tr> </tbody> </table>	Termination month	Enrollment Window	January	November 1 - February 28	February	December 1 - March 31	March	January 1 - April 30	April	February 1 - May 31	May	March 1 - June 30	June	April 1 - July 31	July	May 1 - August 31	August	June 1 - September 30	September	July 1 - October 31	October	August 1 - November 30	November	September 1 - December 31	December	October 1 - January 31
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<p>SEP: REC Individuals Enrolled in a Plan Placed in Receivership</p>	<p>SEP exists for individuals enrolled in a plan offered by a MA organization or PDP sponsor that has been placed into receivership by a state or territorial regulatory authority. "</p>	<p>SEP REC Enroll into MA, MAPD or PDP</p>	<p>I'm in a plan that was recently taken over by the state because of financial issues. I want to switch to another plan.</p>	<p>The SEP begins the month the receivership is effective and continues until it is no longer in effect or until the enrollee makes an election, whichever occurs first.</p>																										
<p>SEP: LPI Individuals Enrolled in a Consistently Poor Performing Plan</p>	<p>This SEP is for individuals who are enrolled in a plan that CMS has identified with the low performing icon on Medicare.gov. These individual may have received a letter from CMS encouraging them to consider another plan since their current plan is a consistently poor performing plan. This SEP exists while the individual is enrolled in the low performing Part D plan.</p>	<p>SEP LPI Enroll into MA, MAPD or PDP</p>	<p>I'm in a plan that's had a star rating of less than 3 stars for the last 3 years. I want to join a plan with a star rating of 3 stars or higher.</p>	<p>This SEP exists while the individual is enrolled in the low performing Part D plan</p>																										
<p>SEP: ACC Individuals who Requested Materials in Accessible Formats Equal Time to Make Enrollment Decisions</p>	<p>"CMS will grant a SEP in situations where the organization or CMS was unable to provide required notices or information in an accessible format, as requested by an individual, within the same timeframe that it was able to provide the same information to individuals who did not request an accessible format. "</p>	<p>SEP ACC Enroll into MA MAPD PDP</p>	<p>I was notified that I am eligible to enroll in a new plan because my current plan did not provide required notices or information in an accessible format</p>	<p>"SEP begins at the end of the election period during which the beneficiary was seeking to make an election. The start and length of the SEP, as well as the effective date, are dependent upon the situation, and are at least as long as the time it took for the information to be provided to the individual in an accessible format."</p>																										
<p>SEP: OSD Individual Dropped Cost plan</p>	<p>This SEP is for Individuals dropping their cost plan and switching to original medicare and they want to enroll in a PDP. Enrollment window is the Month of the event and two additional months.</p>	<p>SEP OSD To Enroll into PDP</p>	<p>I dropped my Cost Plan with drug coverage and switched to Original Medicare. I want to join a Medicare drug plan.</p>	<table border="1"> <thead> <tr> <th>Month of dropping Cost Plan</th> <th>Enrollment Period</th> </tr> </thead> <tbody> <tr> <td>January</td> <td>January 1 - March 31</td> </tr> <tr> <td>February</td> <td>February 1 - April 30</td> </tr> <tr> <td>March</td> <td>March 1 - May 31</td> </tr> <tr> <td>April</td> <td>April 1 - June 30</td> </tr> <tr> <td>May</td> <td>May 1 - July 31</td> </tr> <tr> <td>June</td> <td>June 1 - August 31</td> </tr> <tr> <td>July</td> <td>July 1 - September 30</td> </tr> <tr> <td>August</td> <td>August 1 - October 31</td> </tr> <tr> <td>September</td> <td>September 1 - November 30</td> </tr> <tr> <td>October</td> <td>October 1 - December 31</td> </tr> <tr> <td>November</td> <td>November 1 - January 31</td> </tr> <tr> <td>December</td> <td>December 1 - February 28</td> </tr> </tbody> </table>	Month of dropping Cost Plan	Enrollment Period	January	January 1 - March 31	February	February 1 - April 30	March	March 1 - May 31	April	April 1 - June 30	May	May 1 - July 31	June	June 1 - August 31	July	July 1 - September 30	August	August 1 - October 31	September	September 1 - November 30	October	October 1 - December 31	November	November 1 - January 31	December	December 1 - February 28
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SEP: IND	<p>This SEP is for Individuals who live in or within the past 2 months moved out of a long term care facility and they want to join a PDP.</p> <p>Effective date must be the 1st of next month</p> <p>Enrollment Window is the Month of and two additional months</p>	<p>SEP IND</p> <p>To Enroll into PDP</p>	<p>I live in or (within the past 2 months) moved out of a long-term care facility, like a nursing home or a rehabilitation hospital. I want to join a Medicare drug plan</p>	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr style="background-color: red; color: white;"> <th style="text-align: center;">Month of Event</th> <th style="text-align: center;">Enrollment Period</th> </tr> </thead> <tbody> <tr><td>January</td><td>January 1 - March 31</td></tr> <tr><td>February</td><td>February 1 - April 30</td></tr> <tr><td>March</td><td>March 1 - May 31</td></tr> <tr><td>April</td><td>April 1 - June 30</td></tr> <tr><td>May</td><td>May 1 - July 31</td></tr> <tr><td>June</td><td>June 1 - August 31</td></tr> <tr><td>July</td><td>July 1 - September 30</td></tr> <tr><td>August</td><td>August 1 - October 31</td></tr> <tr><td>September</td><td>September 1 - November 30</td></tr> <tr><td>October</td><td>October 1 - December 31</td></tr> <tr><td>November</td><td>November 1 - January 31</td></tr> <tr><td>December</td><td>December 1 - February 28</td></tr> </tbody> </table>	Month of Event	Enrollment Period	January	January 1 - March 31	February	February 1 - April 30	March	March 1 - May 31	April	April 1 - June 30	May	May 1 - July 31	June	June 1 - August 31	July	July 1 - September 30	August	August 1 - October 31	September	September 1 - November 30	October	October 1 - December 31	November	November 1 - January 31	December	December 1 - February 28
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SEP: IIP	<p>This SEP is for individuals living in a long term care facility and they dropped their MA plan to join a PDP plan.</p> <p>Effective date must be the 1st of next month</p> <p>Valid as long as the individual resides in the long-term facility.</p> <p>Enrollment Window is the Month of and two additional months</p>	<p>SEP IIP</p> <p>To enroll into PDP</p>	<p>I live in a long-term care facility, like a nursing home or a rehabilitation hospital. I dropped my MA Plan with drug coverage and I want to join a drug plan.</p>	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr style="background-color: red; color: white;"> <th style="text-align: center;">Month of Event</th> <th style="text-align: center;">Enrollment Period</th> </tr> </thead> <tbody> <tr><td>January</td><td>January 1 - March 31</td></tr> <tr><td>February</td><td>February 1 - April 30</td></tr> <tr><td>March</td><td>March 1 - May 31</td></tr> <tr><td>April</td><td>April 1 - June 30</td></tr> <tr><td>May</td><td>May 1 - July 31</td></tr> <tr><td>June</td><td>June 1 - August 31</td></tr> <tr><td>July</td><td>July 1 - September 30</td></tr> <tr><td>August</td><td>August 1 - October 31</td></tr> <tr><td>September</td><td>September 1 - November 30</td></tr> <tr><td>October</td><td>October 1 - December 31</td></tr> <tr><td>November</td><td>November 1 - January 31</td></tr> <tr><td>December</td><td>December 1 - February 28</td></tr> </tbody> </table>	Month of Event	Enrollment Period	January	January 1 - March 31	February	February 1 - April 30	March	March 1 - May 31	April	April 1 - June 30	May	May 1 - July 31	June	June 1 - August 31	July	July 1 - September 30	August	August 1 - October 31	September	September 1 - November 30	October	October 1 - December 31	November	November 1 - January 31	December	December 1 - February 28
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CMS regulations dictate election period hierarchy choice when two (or more) election periods overlap.

When two (or more) election periods overlap, the election that is the most beneficial for the beneficiary should be chosen.

1. IEP/ICEP
2. (MA) OEP/OEP-New
3. SEP
4. AEP