

## **Tip Sheet : 2023 Part D Enrollment Outcomes (PDEO) Verification Documents**

What do you need to upload in STARS or Save on file in the SHIP office (print or electronic files)?

The 2022 Medicare Open Enrollment (OEP) season for plan year 2023 comes with a few changes due to the Inflation Reduction Act and its savings for beneficiaries who use insulin. Namely, the Medicare Plan Finder will not reflect the \$35 copayment for each covered insulin this OEP or during 2023 calendar year.

These changes do not impact the number of documents SHIP Team Member will need to verify cost changes. It also does not change the procedure for entering PDEO costs into STARS (see Chapter 7 of the STARS manual). The quick tips below should help provide guidance on which documents SHIP Team Members will need when beneficiaries switch Medicare Part D plans or are New to Medicare Part D. Documents will be uploaded into STARS or saved in print or electronic files in the SHIP office.

### **Switching Plans Verification Documents**

Must have three documents: 1. Plan Details for the original plan; 2. Plan Details for the new plan; and 3. Enrollment verification for the new plan.

#### ➤ Plan Details

- Original and new plan names must be listed on the Plan Details.
- Yearly drug & premium costs must be shown to verify cost entered in the Original PDP/MA-PD and New PDP/MA-PD Special Use Fields. This can be found in the Estimated Total Drug + Premium Cost section of the Plan Details.
- If the beneficiary takes insulin, CMS has suggested running the plan comparison twice: initially without the insulin, and again with the insulin medication to verify the plan covers their insulin. For PDEO cost change tracking, save the Plan Details page with the insulin medications.
  - NOTE: No additional math is required for insulin users when reporting PDEO cost changes. Use the costs from the Plan Details with insulin medication. The cost will be slightly inflated but reflect the best information available in Medicare Plan Finder at the time.

#### ➤ Enrollment verification

- The new plan's name must be listed on the enrollment verification. It must also match the name listed on the Plan Details.

#### ➤ Upload the Plan Details for the original and new plans and the Enrollment Verification for the new plan into STARS or save on file (print or electronic) in the SHIP office.

## **New to Medicare Verification Documents**

Must have two documents: 1. Plan Details for the new plan; and 2. Enrollment verification for the new plan.

### ➤ Plan Details

- New plan name must be listed on the Plan Details.
- Monthly totals (Retail cost) must be shown to verify the cost entered in the Original PDP/MA-PD Special Use Field.
- Yearly drug & premium costs must be shown to verify cost entered in the New PDP/MA-PD Special Use Field. This can be found in the Estimated Total Drug + Premium Cost section of the Plan Details.
- If the beneficiary takes insulin, CMS has suggested running the plan comparison twice: initially without the insulin, and again with the insulin medications. Save the Plan Details page that has the insulin medications on it.
  - NOTE: No additional math is required for insulin users when reporting PDEO cost changes. Use the costs from the Plan Details with insulin medication. The cost will be slightly inflated yet reflect the best information available in Medicare Plan Finder at the time.

### ➤ Enrollment verification

- The new plan's name must be listed on the enrollment verification. It must also match the name listed on one of the Plan Details pages.

### ➤ Upload the Plan Details and Enrollment Verification for the new plan into STARS or save on file (print or electronic) in the SHIP office.