**Permission to Contact (PTC)**  
Agents aren’t allowed to call or email prospective clients about MA-PD or Part D unless the client specifically asks to be called. Agents can only call a potential client when the client has given express written permission to contact them. PTC can be obtained by a prospect returning a business reply card that discloses who will contact, what products will be discussed and by what specific method the consumer can expect contact. The following is the recommended disclaimer “By submitting this form, I understand a licensed agent may contact me by telephone or email to discuss Medicare Advantage and Part D Prescription Drug Plans.” Adding this to bottom of the business reply card (postal or electronic) will allow agents to obtain valid permission to contact the prospect that submits the form about Medicare Advantage or Part D Prescription Drug Plans.

Plans/Part D Sponsors may make unsolicited direct contact with potential enrollees using the following methods:

• Conventional mail and other print media (e.g., advertisements, direct mail)

• Email provided all emails contain an opt-out function

Plans/Part D sponsors ***may not***:

• Use door-to-door solicitation, including leaving information such as a leaflet or flyer at a residence;

• Approach potential enrollees in common areas (e.g., parking lots, hallways, lobbies, sidewalks, etc.); or,

• Use telephonic solicitation, including text messages and leaving electronic voicemail messages.

Note: Agents/brokers who have a pre-scheduled appointment with a potential enrollee who is a “no-show” may leave information at that potential enrollee’s residence. If a potential enrollee provides permission to be contacted, the contact must be event- specific, and may not be treated as open-ended permission for future contacts.