**Compass MED D - Request to Change Enrollment Effective Date**

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**Description:** This document provides the CCR with information on how to handle a beneficiary or legal representative’s request to change the effective date of enrollment.

| **General Information** |
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The Effective Date of Enrollment is the date that a beneficiary can utilize their benefits. This date is determined by the enrollment period use on the application and when application was submitted.

In most scenarios, **a beneficiary is not able to change their benefit effective date.** This date is determined by the date the application, as received by the plan sponsor and the enrollment period used for the application.

 **NEJE members with a TRC 118 designation** who wish to change their effective date must submit a new enrollment application.

There are three types of enrollment/election periods that a beneficiary can use to enroll in a MED D Prescription Drug Plan or Medicare Advantage Prescription Drug Plan (MAPD):

* Initial Enrollment Period (IEP)
* Annual Enrollment Period (AEP)
* Special Enrollment Period (SEP)

However, there may be exceptions where a beneficiary can change their effective date. The most common scenarios are:

* Beneficiary is eligible for two different election/enrollment periods
* Beneficiary is enrolling into Employer/Union Group Health Plan (EGHP)
* Beneficiary is eligible for an SEP due to Involuntary Loss of Creditable Coverage

Possible effective date change scenarios are not limited to the above. For further information on the effective date of enrollment and election periods. Refer to [MED D - Election Periods for Enrollment and Disenrollment (AEP, IEP, SEP)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=23d6bdd2-b914-4dd9-bf92-05f5d0f1088a).

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| **Effective Date Change** |

 Access to MARx and FAZAL may be required to research and complete an effective date change.

Perform the following:

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| **Step** | **Action** | |
| **1** | From the **Medicare D Member Details** panel on theMedicare D Landing Page, review the **Coverage** field for the effective date of coverage. Provide that date to the beneficiary.  A screenshot of a medical form  AI-generated content may be incorrect.  Does the beneficiary want to request a change in their Benefit Effective date?  **Note:** Requests can only be submitted if prior to the Benefit Effective Date in Compass. | |
| **If...** | **Then...** |
| Yes | Proceed to the next step. |
| No | Address any other issues. |
| **2** | Confirm the following information with the caller:   * The **effective date** requested for the beneficiary * The **enrollment period/SEP** used on the current application * The **reason** the change for the requested change * **Cell phone** **number** or readily accessible home phone number for the caller   Proceed to the next step. | |
| **3** | In most scenarios,**a beneficiary is not able to change their benefit effective date.**   * There may be exceptions where a beneficiary can change their effective date. The most common scenarios are: * Beneficiary is eligible for two different election/enrollment periods * Beneficiary is enrolling into Employer/Union Group Health Plan (EGHP) * Beneficiary is eligible for an SEP due to Involuntary Loss of Creditable Coverage   From the Medicare D Landing Page, click the **Create Support Task** button. Refer to [Compass - Create a Support Task](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=64f18e5a-4d56-4175-ba8e-e7d094e501d6) as needed.  Create a new task with the following:   * **Task Type:** Enrollment - Effective Date Change * **Contact Name:** pre-populated * **Contact Phone Number:** * **Medicare D Plan:** Yes or No * **Issue Information (Med D):** Enter information in the required fields   + **MBI:** pre-populated   + **State:**   + **Contract Type:** Facilitated – SSI; or Facilitated NEJE   + **Earlier Effective Date:**   + **Medicare D Contract ID:** S5601; or S2893 (NEJE)   + **Verbal Attestation:** Yes   + **PBP ID:**   A screenshot of a computer  AI-generated content may be incorrect.  A screenshot of a computer  AI-generated content may be incorrect.  Proceed to the next step. | |
| **4** | **Enter** the following in the **Notes** section of the Support task **using the following** **template**:  <Caller> contacted the plan on <date> requesting an Effective Date Change for <beneficiary name>. The beneficiary is requesting this change because <why>. The beneficiary requests an effective date of <date>. The <beneficiary/POA/authorized representative> can be contacted at <phone number>.  CCRs **MUST** obtain a valid phone number. Member Services needs to contact the beneficiary to confirm the required information. It is **STRONGLY** recommended that the beneficiary provide a cell phone number, if available.  Proceed to the next step. | |
| **5** | I have submitted a request to our member services team to review the requested change. This team will contact you within 4 days to verify the information provided. Please be advised that if we are unable to confirm the information, your request will be denied. | |

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| **Related Documents** |

* Refer to the “Grievance Standard Verbiage (for use in Discussion with Beneficiary)” section in [Compass MED D - Grievances Index](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=70034f51-77df-49a4-ae97-7d3d63b216b3).

* [MED D Enrollment - FAZAL](https://aetnao365-my.sharepoint.com/personal/janelle_murrell_cvshealth_com/AppData/Local/Microsoft/AppData/Local/Microsoft/AppData/Local/Microsoft/Windows/INetCache/Content.Outlook/AppData/Local/Microsoft/Windows/INetCache/Content.Outlook/2ULSS2XL/CMS-PRD1-078799)
* [Compass MED D - SHIP Counselor Calls For CVS Caremark Part D Plans](https://thesource.cvshealth.com/nuxeo/thesource/" \l "!/view?docid=5507bbf1-230b-45ae-bf6b-923dcd16b4cf)
* [Compass MED D - Appointed Representative Form (AOR) or Power of Attorney (POA)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=64c3fc62-48c3-4ad3-ae83-c736cebd521b)
* [Compass MED D - SilverScript and Blue MedicareRx (NEJE) - Enrollment Related Support Tasks](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=39a75bb6-425d-4eb7-a436-036f5da9d31a)
* [MED D - Election Periods for Enrollment and Disenrollment (AEP, IEP, SEP)](https://aetnao365-my.sharepoint.com/personal/janelle_murrell_cvshealth_com/AppData/Local/Microsoft/AppData/Local/Microsoft/AppData/Local/Microsoft/Windows/INetCache/Content.Outlook/AppData/Local/Microsoft/Windows/INetCache/Content.Outlook/2ULSS2XL/CMS-PCP1-040036)
* [MED D - CMS Passive Enrollment in MMP - Required Voluntary Disenrollment from the PDP, Opt-Out and Disenrollment from the MMP](https://aetnao365-my.sharepoint.com/personal/janelle_murrell_cvshealth_com/AppData/Local/Microsoft/AppData/Local/Microsoft/AppData/Local/Microsoft/Windows/INetCache/Content.Outlook/AppData/Local/Microsoft/Windows/INetCache/Content.Outlook/2ULSS2XL/CMS-PRD1-095080)

**Parent SOP:**

* MEDS-0041: [Medicare Part D Voluntary Disenrollment, CVS Caremark Part D Services, L.L.C., Policy and Procedure](https://policy.corp.cvscaremark.com/pnp/faces/DocRenderer?documentId=MEDS-0041)
* MEDS-0006: [Medicare Part D - Cancellation of Enrollment and Disenrollment Policy and Procedure, CVS Caremark Part D Services, L.L.C.](https://policy.corp.cvscaremark.com/pnp/faces/DocRenderer?documentId=MEDS-0006)
* CALL-0048: [Medicare Part D - Customer Care Call Center Requirements, CVS Caremark Part D Services, L.L.C.](https://policy.corp.cvscaremark.com/pnp/faces/DocRenderer?documentId=CALL-0048)

**Abbreviations/Definitions:**

* [Abbreviations / Definitions](https://aetnao365-my.sharepoint.com/personal/janelle_murrell_cvshealth_com/AppData/Local/Microsoft/AppData/Local/Microsoft/AppData/Local/Microsoft/Windows/INetCache/Content.Outlook/AppData/Local/Microsoft/Windows/INetCache/Content.Outlook/2ULSS2XL/CMS-2-017428)

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