

Part D & MA-PD Beneficiary Cost Savings Checklist

1. Topics Discussed

- Check *Enrollment* in **either** the “Medicare Part D” or “Medicare Advantage (MA and MA-PD)” category depending on what plan beneficiary was enrolled into
- If the beneficiary is new to PDP/MA-PD, select the *New to Medicare* topic in “Additional Topic Details” category

2. Special Use Field: Original PDP/MA-PD Cost

- Enter the *Estimated Yearly Drug Cost & Premium* of the plan the beneficiary’s **current plan** listed on Medicare Plan Finder
- If beneficiary has no current Medicare PDP/MA-PD plan, then enter the *total monthly retail drug costs* displayed for Original Medicare on Medicare Plan Finder

3. New PDP/MA-PD Cost

- Enter the *Estimated Yearly Drug Cost & Premium* of the **new plan** the beneficiary was enrolled in, as listed on the Medicare Plan Finder

4. Cost Verifications

- Upload Application Confirmation
- Upload Cost Changes Verification

*Note:

Make sure that you are screening for MIPPA and sharing the SMP message too! Ensure that both options are selected on the Beneficiary Contact Form along with appropriate qualifying topics selected or the record will be rejected.

