

DETAIL of TIMELINE

2011

MAY

Social Security LIS and MSP Outreach Notice
(SSA Forms L447 & L448)
Notice from Social Security tells people about Medicare Savings Programs and Extra Help.

LIS Choosers Reminder Notice
(11465)

TAN notice reminds people that they can join a plan for \$0 premium as long as they qualify for Extra Help.

SEPTEMBER

Social Security Notice to Review Eligibility for Extra Help
(SSA Form 1026)

Asks people selected for review to complete and return an enclosed form to see if they still qualify for Extra Help. People must return the form within 30 days or their Extra Help may end.

Plan Annual Notice of Change (ANOC)
Plans send a notice by September 30 outlining formulary, benefit and cost changes for 2012.

Plan LIS Rider
Plans send people who qualify for Extra Help an LIS rider telling them how much help they will get in 2012 towards their Part D premium, deductible, and copayments by September 30.

Notice of Creditable Coverage
Employer/union and other group health plans must tell all Medicare-eligible enrollees whether or not their drug coverage is creditable before September 30.

Loss of Deemed Status Notice
(11198)

GREY notice tells people they no longer automatically qualify for Extra Help next year.

"Medicare & You" 2012 Handbook
Mailed to all Medicare households each fall.

OCTOBER

Plan Marketing Materials
Plans start sending marketing materials on October 1.

Plan Non-Renewal Notice
Plans that are leaving the Medicare Program next year send notices to plan members by October 2.

Change in Extra Help Copayment Notice
(11199)

ORANGE notice tells people they still automatically qualify for Extra Help next year, but their copayment levels will change.

Reassignment Notice
(11208, 11209 & 11443)

BLUE notice from CMS tells people that they will be reassigned to a new drug plan either because their current plan is leaving the Medicare Program, or because their current plan's premiums will no longer be fully covered by the Extra Help.

NOVEMBER

LIS Choosers Notice
(11267)

TAN notice tells people who qualify for Extra Help and chose a plan on their own that their plan's premium is changing, and they will pay a premium in 2012 unless they join a new plan.

CMS Non-Renewal Reminder Notice
(11433 & 11438)

Reminds people whose plan is leaving the Medicare Program that they need to choose a new plan for 2012.

Social Security Part B & Part D Income-Related Adjustment Amount Notice
Notice tells higher-income consumers about income-related premium adjustments. Includes information in December BRI notices.

Social Security LIS Redetermination Decision Notice Begins
Social Security starts mailing notices about whether people still qualify for Extra Help for the coming year.

Social Security LIS and MSP Outreach Notice
(SSA Form L441)

Notifies people who may be eligible for Qualified Disabled and Working Individual (QDWI) about Medicare Savings Programs and Extra Help.

DECEMBER

Social Security Benefit Rate Change (BRI) Notice
Notice tells people about benefit payment changes for 2012 due to cost of living increases, variations in the premiums withheld, etc.

Reassign Formulary Notice
(11475 & 11496)

BLUE notice tells people being reassigned which Part D drugs they take will be covered by their new plan.

2012

JANUARY

CMS Non-Renewal Action Notice
(11452)

Reminds people whose plan is leaving the Medicare Program that they need to choose a new plan for 2012.

ANNUAL CASEWORKER CALENDAR

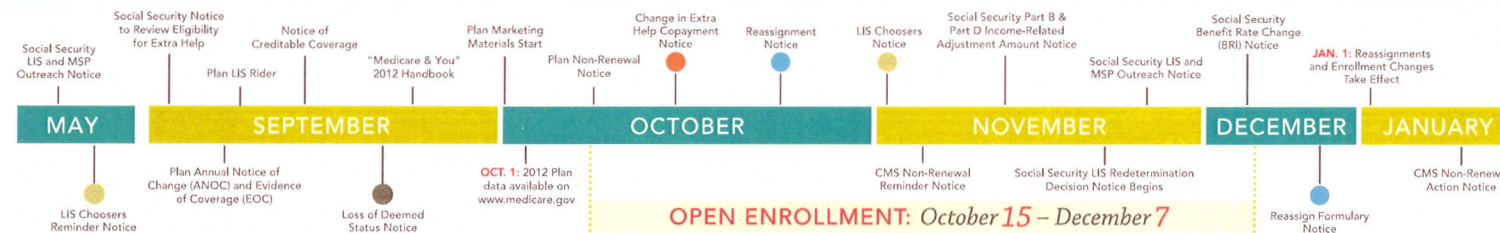


POCKET GUIDE:
Understanding Beneficiary Notices and Options

2011 - 2012



ANNUAL CASEWORKER CALENDAR: *Understanding Beneficiary Notices and Options*



ONGOING NOTICES MAILED DAILY

Deemed Status Notice
(11166)

PURPLE notice tells people they automatically qualify for Extra Help.

Auto-Enrollment Notice
(11154 & 11429)

YELLOW notice tells people with Medicare and Medicaid and people with retroactive Extra Help that they will be automatically enrolled in a drug plan if they don't enroll themselves or decline coverage.

Facilitated Enrollment Notice
(11186 & 11191)

GREEN notice tells people who qualify for Extra Help that they will be automatically enrolled in a drug plan if they don't enroll themselves or decline coverage.

FBDE RDS Notice
(11334)

Tells people with Medicare and Medicaid who already have certain creditable drug coverage from an employer/union that they automatically qualify for Extra Help and can join a Part D plan at no cost to them.

Social Security Initial IRMAA Determination Notice
Tells people with Part B and/or Part D whether any IRMAA amounts apply to them.

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