**Allowed Telesales Activities**

Plans/Part D sponsors and their agents/brokers may not make unsolicited telephone calls to prospective enrollees. However, they are permitted to contact their current enrollees to discuss plan business, but cannot market prior to October 1 under the pretense of plan business.

Plans/Part D sponsors, and their agents/brokers, may conduct the following specific telephonic activities:

* Call current enrollees, including those in non-Medicare products, to discuss plan business (examples of this include calls to enrollees aging into Medicare from commercial products offered by the same organization, calls to an organization’s existing Medicaid/MMP plan enrollees to talk about its Medicare products, and calls to current MA enrollees to promote other Medicare plan types or to discuss plan benefits);
* Call beneficiaries who submit enrollment applications to conduct business related to enrollment;
* Call former enrollees after the disenrollment effective date to conduct disenrollment surveys for quality improvement purposes (disenrollment surveys conducted telephonically, email or conventional mail may not include sales or marketing information);
* Under limited circumstances with approval from the CMS Account Manager, call LIS- eligible enrollees that a plan is prospectively losing due to reassignment to encourage them to remain enrolled in their current plan;
* Call individuals who have given permission for a plan or sales agent to contact them (examples of permission include filling out a business reply card, emailing the Plan/Part D sponsor requesting a return call, or asking a customer service representative to have an agent contact them); and,

**Note:** Permission applies only to the entity from which the individual requested contact and for the duration and topic of that transaction.

* Return phone calls or messages from individuals or enrollees, as these are not considered unsolicited contacts.