Meeting Summary
MMA Education and Outreach Subcommittee
Advisory Panel on Medicare Education (APME)
Redesign of the Initial Enrollment Period Package (IEP)
Thursday, November 4, 2004 / 1:00 – 3:00 PM (EST)

Attendees

APME Subcommittee
Clayton Fong, David Knutson, Dr. Daniel Lyons, Katherine Metzger, Dr. Keith Mueller, Lee Partridge, Dr. Marlon Priest, Catherine Valenti

CMS
Lynne Johnson (Designated Federal Official), Dwayne Campbell, Michelle DeLisle, Thomas Dudley, Sandy Kappert, Thomas Kickham, Michael McMullan, Regina McPhillips, Danielle Moon, Erin Pressley, Thomas Reilly, Trish Sharp, Jeannie Wilkerson

Welcome and Opening Remarks – Michael McMullan, Deputy Director for Beneficiary Education, CBC, CMS and Dr. Marlon Priest, APME Subcommittee Chair

Ms. McMullan explained the purpose of the meeting and the role of the subcommittee. She informed the members that they would be commenting on the IEP, a somewhat mature product; however, in the future the Agency wants their input on communication materials that are in the formative stage.

Dr. Priest asked the subcommittee about their expectations and outcomes for the meetings. He stated that this is an opportunity to expand the work of APME.

IEP Overview – Erin Pressley, Director, Division of Beneficiary Publication Development, CBC, CMS

Ms. Pressley explained:
- The IEP;
- Purpose of the redesign of the IEP;
- Past research; and
- Timeline for completing the redesign and mailing the package.

Group Discussion - Dr. Marlon Priest, APME Subcommittee Chair

As a result of today's presentation and group discussion, the subcommittee came to a consensus and recommended the following:
- Move the IEP's "Summary of Decisions You Need to Make" (page 18) to the front of the publication. Inform beneficiaries first of what decisions they have to make, and then explain to them how to do it. Also include on this page text that would refer beneficiaries to their State governments if they have low incomes.
- Add a reminder box to the publication that tells the beneficiary to keep all Medicare publications together while informing them that they will receive additional information.

Beneficiaries should receive the next publication within 2 weeks of receiving the IEP publication instead of CMS's 6-week time frame.

- Add text that encourages beneficiaries to take advantage of Part B, stating that Part B is a good benefit at a modest cost.
- The reminder box on page 11 of the IEP includes information about continuing to work and having health coverage from an employer. The box should be moved closer to page 3, which contains similar information.
- In addition, the subcommittee stated that as a result of the MMA, CMS needs to develop an employer strategy.

Conclusion and Next Steps – Michael McMullan and Dr. Marlon Priest

Ms. McMullan explained that the Agency will utilize the subcommittee to review and give input on the redesign of the *Medicare & You* handbook and the medigare.gov website. Future meeting dates will be announced.

Attachment

A. *Welcome to Medicare*, Initial Enrollment Period Publication (DRAFT COPY)