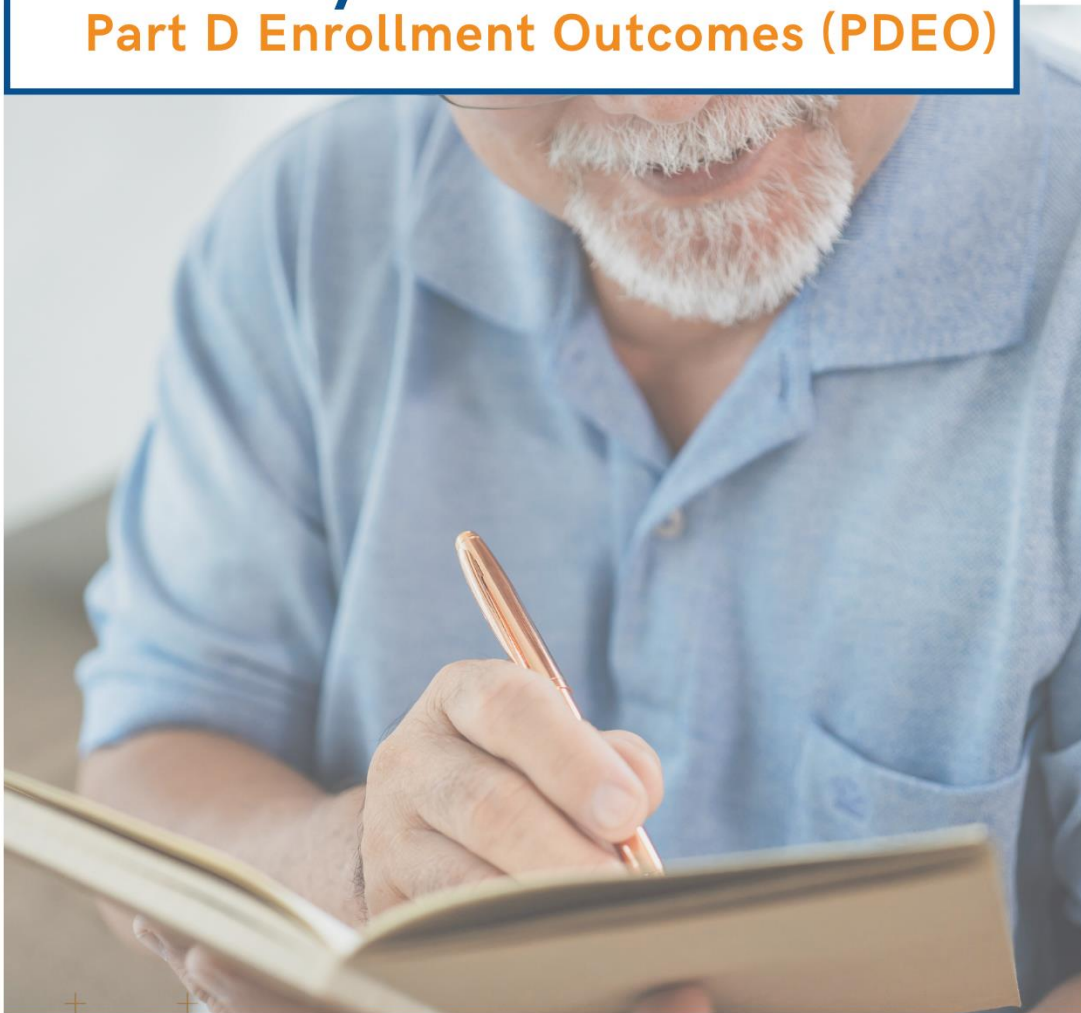




Data Entry Checklists

Part D Enrollment Outcomes (PDEO)



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Introduction

About This Resource

These checklists are companion tools to the STARS Manual, *Chapter 7A – Part D Enrollment Outcomes: Data Entry*. That resource outlines the four-step process for tracking Part D Enrollment Outcomes (PDEO):

1. Collect PDP/MA-PD cost comparison data
2. Assist beneficiary with enrollment
3. Enter enrollment data in STARS
4. Attach verification

This resource supports you in reviewing your work and ensuring that all required steps of the PDEO data entry process are completed. It provides a brief overview of Part D Prescription Drug Plans and Medicare Advantage plans with Prescription Drug coverage (PDP/MA-PD) enrollment scenarios, along with checklists for the required steps for each scenario.

Accurate data entry and documentation are essential, but represent only one part of the PDEO process. To reduce your SHIP's error rate and pass quality assurance, you must complete every step carefully. For comprehensive guidance on all steps, review Chapter 7A of the STARS Manual.

Note: For simplicity, the checklists do not include rounding costs or account for enrollment assistance provided outside the Medicare Plan Finder (MPF); however, these activities are still permitted.

How to Use This Resource

To begin, identify the enrollment scenario that matches the assistance you are providing. Then navigate to the corresponding checklist in this document.

Use the checklist to verify that you have completed all required data entry steps in STARS. This includes entering cost information, checking relevant boxes in STARS, and uploading appropriate documentation. These checklists assume you are following the best practice of attaching cost verification and enrollment documentation directly in STARS. While storing verification outside of STARS is allowed, all documentation must be readily accessible for PDEO quality assurance reviews.

You can print and reuse these checklists. Use a pencil to track your progress or revisit the page later if needed. You may wish to print the full checklist set and store it in a binder, making it easy to remove individual pages or copy them as needed.

These checklists are based on the use of the Medicare Plan Finder. If enrollment assistance was provided using another method, refer to Chapter 7A of the STARS Manual for documentation instructions.

For additional support or clarification, visit the **PDEO Toolbox** in the password-protected section of www.shiphelp.org or consult the STARS Manual.

PDP/MA-PD Enrollment Scenarios Overview

Switching PDP/MA-PD

This enrollment scenario applies in the following instances:

- a) The beneficiary is currently enrolled in a PDP/MA-PD plan and enrolls in a new PDP/MA-PD plan with your assistance, or
- b) The beneficiary was automatically enrolled (also known as facilitated enrollment) into a plan previously, and you assist with enrollment into a different plan.

New to Medicare PDP/MA-PD

This enrollment scenario applies when:

- a) A person has no previous PDP/MA-PD coverage, or
- b) Has previous non-Medicare drug coverage, or
- c) A beneficiary's plan is no longer available on the MPF due to plan termination, sanction, or moving to a new area/state/territory.

New to Medicare PDP/MA-PD (this year) and Switching PDP/MA-PD (next year)

This enrollment scenario occurs during Medicare's Open Enrollment Period when you assist a beneficiary with a new to Medicare PDP/MA-PD enrollment for the current year and a switching PDP/MA-PD enrollment for the upcoming year.

Switching PDP/MA-PD Checklists

With Prescriptions on a 30-Day Refill Schedule

Task	✓
Saved Original Plan Details	
Saved New Plan Details	
Collected the Original PDP/MA-PD Cost from the “Total drug + premium cost” for the beneficiary’s preferred pharmacy on the Original Plan Details	
Collected the New PDP/MA-PD Cost from the “Total drug + premium cost” for the beneficiary’s preferred pharmacy on the New Plan Details	
Saved the Enrollment Request Received page or the notice to the beneficiary’s Medicare Message Center	
Entered the Original PDP/MA-PD Cost and New PDP/MA-PD Cost in STARS	
Attached Original Plan Details	
Attached New Plan Details	
Checked the Enrollment topic in either the “Medicare Advantage (MA and MA-PD)” or “Medicare Part D” sub-category	
Attached the enrollment Request Received page or the notice to the beneficiary’s Medicare Message Center for enrollment verification	

Final Check 🔍

- The Original PDP/MA-PD Cost in STARS matches the “Total drug + premium cost” for the beneficiary’s preferred pharmacy on the Original Plan Details
- The New PDP/MA-PD Cost in STARS matches the “Total drug + premium cost” for the beneficiary’s preferred pharmacy on the New Plan Details
- All Plan Details are available and show the plan names
- Enrollment verification is available

New to Medicare PDP/MA-PD Checklists

With Prescriptions on a 30-Day Refill Schedule

Task	✓
Saved Plan Details	
Calculated the Original PDP/MA-PD Cost by finding the “Monthly Totals” under the “Retail cost” column for the beneficiary’s preferred pharmacy and multiplied by the number of coverage months	
Collected the New PDP/MA-PD Cost from the “Total drug + premium cost” for the beneficiary’s preferred pharmacy on the Plan Details	
Saved the Enrollment Request Received page or the notice to the beneficiary’s Medicare Message Center	
Entered the Original PDP/MA-PD Cost and New PDP/MA-PD Cost in STARS	
Attached Plan Details	
Checked <i>New to Medicare</i> under Additional Topic Details in STARS	
Checked the Enrollment topic in either the “Medicare Advantage (MA and MA-PD)” or “Medicare Part D” sub-category	
Attached the enrollment Request Received page or the notice to the beneficiary’s Medicare Message Center for enrollment verification	

Final Check 🔍

- The Original PDP/MA-PD Cost in STARS is correctly calculated
- The New PDP/MA-PD Cost in STARS matches the “Total drug + premium cost” for the beneficiary’s preferred pharmacy on the Plan Details
- *New to Medicare* is checked in STARS
- All Plan Details are available and show the plan name
- Enrollment verification is available

Prescription Refills on a Consistent Non-30-Day Cycle (New to Medicare PDP/MA-PD) ²

Task



Saved Plan Details	
Calculated the Original PDP/MA-PD Cost by finding the “Monthly Totals” in the “Retail cost” column on the Plan Details for the beneficiary’s preferred pharmacy and multiplying by the number of refills during the coverage period.	
Collected the New PDP/MA-PD Cost from the “Total drug + premium cost” for the beneficiary’s preferred pharmacy on the Plan Details (found in the <i>Estimated total monthly drug cost</i> section at the preferred pharmacy).	
Saved the Enrollment Request Received page or the notice to the beneficiary’s Medicare Message Center	
Entered the Original PDP/MA-PD Cost and New PDP/MA-PD Cost in STARS	
Attached Plan Details	
Checked <i>New to Medicare</i> under Additional Topic Details in STARS	
Checked the Enrollment topic in either the “Medicare Advantage (MA and MA-PD)” or “Medicare Part D” sub-category	
Attached the enrollment Request Received page or the notice to the beneficiary’s Medicare Message Center for enrollment verification	

Final Check

- The Original PDP/MA-PD Cost in STARS is correctly calculated
- The New PDP/MA-PD Cost in STARS is calculated correctly
- New to Medicare is checked in STARS
- All Plan Details are available and show the plan name
- Enrollment verification is available

² In this scenario, medications are all refilled on the same non-30-day schedule.

New to Medicare PDP/MA-PD (This Year) and Switching PDP/MA-PD (Next Year) Checklists

With Prescriptions on a 30-Day Refill Schedule

Task	✓
Saved the New to Medicare PDP/MA-PD Plan Details (Plan Details for the initial Medicare PDP/MA-PD enrollment for the current year)	
Saved the Current PDP/MA-PD Plan Details for Next Year (Plan Details for the Medicare PDP/MA-PD initially enrolled in but reflecting costs for the upcoming year)	
Saved the Switching PDP/MA-PD Plan Details (Plan Details for the Medicare PDP/MA-PD the beneficiary is switching to for the upcoming year)	
Calculated the Original PDP/MA-PD Cost by multiplying the “Monthly Total” in the Retail Cost column (excluding premium) from the New to Medicare PDP/MA-PD Plan Details by the number of coverage months, then adding that to the “Total drug + premium cost” from the Current PDP/MA-PD Plan Details for next year	
Calculated the New PDP/MA-PD Cost by adding the “Total drug + premium cost” from the New to Medicare PDP/MA-PD Plan Details to the “Total drug + premium cost” from the Switching PDP/MA-PD Plan Details for next year	
Saved the Enrollment Request Received pages or the notices to the beneficiary’s Medicare Message Center for both enrollments (this year and next year)	
Entered the Original PDP/MA-PD Cost and New PDP/MA-PD Cost in STARS	
Checked <i>New to Medicare</i> under Additional Topic Details in STARS	
Checked the Enrollment topic in either the “Medicare Advantage (MA and MA-PD)” or “Medicare Part D” sub-category	
Attached New to Medicare PDP/MA-PD Plan Details	
Attached Current PDP/MA-PD Plan Details for Next Year	
Attached Switching PDP/MA-PD Plan Details	
Attached the Enrollment Request Received pages or the notices to the beneficiary’s Medicare Message Center for both enrollments (this year and next year)	

Final Check

- The Original PDP/MA-PD Cost in STARS is correctly calculated
- The New PDP/MA-PD Cost in STARS is correctly calculated
- *New to Medicare* is checked in STARS
- All Plan Details are available and show the plan names
- Enrollment verification is available