



# Do's & Don'ts of OEP Marketing

Before finalizing your marketing for the first quarter of 2022, make sure you understand the marketing rules during the Medicare OEP. During this time (Jan 1- Mar 31), there are restrictions on what kinds of marketing activities you can compliantly use for marketing to clients or prospects.



## During OEP, Agents **Cannot**...

- Host marketing activities that use OEP to gain additional sales
- Encourage beneficiaries to change their enrollment by using OEP in any unsolicited marketing such as email, print, social media, etc.
- Solicit beneficiaries who enrolled in a plan in the most recent AEP
- Target beneficiaries who enrolled in the most recent AEP through purchased mailing lists or personal information



## During OEP, Agents **Can**...

- Distribute marketing materials to clients who request information
- Meet with clients who have requested a meeting to evaluate their options during the OEP
- Promote 5-star plans with continuous enrollment SEP
- Market to the T-65 crowd who have not yet enrolled in Medicare