**Reed & Associates, CPAs - CMS Retroactive Processing Contractor (RPC)**

**Enrollment Data Validation Review**

**Enrollment Transaction (TTC 61) Documentation Worksheet**

**NOTE: This transaction includes PBP Changes within a single contract**

|  |  |  |  |
| --- | --- | --- | --- |
| **Transaction ID:** |       | **Beneficiary ID:** |       |
| **Beneficiary Name:** |            |
| **POA or Legal Representative (if applicable):** |  |
| **Contract Number:** |       | **Effective Date:** |       |
|  |
| **Reason for Enrollment Transaction** *(Please be as detailed as possible)***:**       |
|  |
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| **General Documentation Guidelines for Enrollment Transactions** |
| **NOTE: Because there are multiple Enrollment and PBP Change types that require differing documentation, please see the “Documentation Requirements Matrix” for other enrollment types and further clarification of documentation requirements** |
| **[ ]**  Auto/Facilitated Enrollment |
| **[ ]**  Beneficiary Elected Enrollment **[ ]** Paper  **[ ]**  Electronic **[ ]** Telephonic  **[ ]** Online Enrollment Center (OEC) |
| **[ ]**  PACE Enrollment  |
| **[ ]**  EGHP Enrollment |
| **[ ]**  PBP Change |
| **[ ]** Passive Enrollment |
| **[ ]** Other |

*For Telephonic Enrollments, Date of call MUST be specified:      .* *For Online, Electronic, Telephonic, & OEC Enrollments, Confirmation # MUST be specified:      .* *For OEC Enrollment – CMS appended date and timestamp MUST be included.* |

Revised 03/2022