**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)***:** | | | | | | |
|  | | | | | | |
| |  | | --- | | **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  MAO / PDP SponsorOnline Enrollment Center Medicare.gov CMS Medicare 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 Medicare.gov CMS Medicare OEC Enrollment – CMS appended date and timestamp MUST be included.* | | | | | | |

Revised 06/2023