Oscar's Broker Checklist to Ensure a Successful OEP

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In June 2025, CMS finalized its Program Integrity Rule. The rule focuses on preventing fraud, waste, and abuse in the individual market.

Brokers must understand these new rules to ensure compliance and accurately advise their members. Changes to OEP, eligibility checks, and renewal processes will require brokers to adapt their practices and proactively help members prepare to enroll. Stay ahead of the curve by visiting our Resource Hub – your go-to destination for all things broker education.

To best prepare for a successful OEP, brokers can start now by using this checklist to keep new and existing members organized and ready to enroll:

Broker checklist for existing members

- [ ] Reach out to members prior to the beginning of OEP and start the conversation early
- [ ] Let your members know all of the potential documentation to pull together ahead of time
    - [ ] **Income verification:** List of potential income verification documents from CMS
    - [ ] **Citizenship or Immigration:** List of potential confirmation documents from CMS
    - [ ] **Tax filings:** Remind members to file taxes for each year they received APTC

Broker checklist for new members

- [ ] Ask your prospective member to gather a list of documents so that you can ensure the smoothest enrollment possible
- [ ] Inform prospective members of all the potential documentation to pull together ahead of time
    - [ ] **Income verification:** List of potential income verification documents from CMS
    - [ ] **Citizenship or Immigration:** List of potential confirmation documents from CMS
    - [ ] **Tax filings:** Remind members to file taxes for each year they received APTC

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