

Beneficiary Contacts

Use the Beneficiary Contact Form (BCF) or Beneficiary Additional Sessions (BAS) form to document each contact between a properly trained, screened, and state-certified team member and a beneficiary or their representative when Medicare or program information is exchanged.

BCF



BAS

Same team member, same day, same issue

Different day, same team member, same issue

Same day, same issue, different team member

Same team member, different day, different issue

Same issue, different day, different team member

An “issue,” in terms of beneficiary contacts, is the reason the person required your assistance. So, meeting about enrollment in 2022, dual eligible special needs plans, and enrollment in 2024 are all different issues. When in doubt about what form to complete, complete a BCF.