

AEP PREPARATION CHECKLIST

1. Certification and Training

- Complete AHIP certification before the AEP begins.
- Attend any additional required carrier-specific training sessions.
- Review updates on Medicare regulations and changes for the coming year.

2. Marketing Materials and Compliance

- Update all marketing materials (brochures, flyers, mailers) to reflect the latest plan benefits and regulations.
- Ensure all marketing efforts comply with CMS guidelines.
- Stock up on necessary printed materials and promotional items.

3. Technology Setup

- Update CRM systems with new features or necessary patches.
- Ensure mobile apps and other software tools are up-to-date and fully functional.
- Test all technology tools to confirm they are operating smoothly for client interactions and data management.

4. Plan Information and Updates

- Review all plan changes, new offerings, and discontinued plans for the upcoming year.
- Prepare comparison charts and quick reference guides for different Medicare plans.
- Familiarize yourself with any changes in premiums, benefits, or network providers.

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5. Client Communication

- Schedule and send pre-AEP communications to current clients reminding them of upcoming dates and offering pre-enrollment reviews.
- Develop an email campaign to educate potential clients about AEP and the importance of plan reviews.
- Create a calendar for follow-ups and consultations during AEP.

6. Training and Support

- Schedule internal team meetings to go over AEP strategies and roles.
- Set up a support system for handling increased client inquiries during AEP.
- Organize or attend refresher courses on customer service and sales tactics.

7. Legal and Ethical Compliance

- Review all applicable CMS regulations to ensure full compliance during AEP.
- Check that all client interactions and record-keeping practices meet ethical standards.
- Update and verify all disclosures and privacy notices as required by law.

Using this checklist, Medicare agents can systematically prepare for the AEP, ensuring they provide optimal service to their clients while adhering to all necessary guidelines and regulations. This preparation will not only enhance client satisfaction but also help maximize enrollments and business growth during AEP.

