



Agent Month by Month Preparation for AEP

1st Quarter

January

- Ensure your MAPD client's drugs and doctors are still in network – OEP appointment
- Verify that all applications were received during AEP
- MACRA goes into effect

February

- Re-evaluate contracts held
- Verify that your contracts are set up as a Corporation

March

- Purchase ticket for National Senior Sales Summit
- Solidify Networking Partners
- Send out Spring Newsletter
- OEP Ends

2nd Quarter

April

- Test out new marketing systems/strategies (you want to test effectiveness prior to AEP)
- Decide what trips and incentives you may want to work towards

May

- Create AEP marketing pieces to give time for compliance to look them over
- Create your AEP office systems and processes
- Attend the Senior Marketing Specialists National Sales Summit

June

- Carrier Sneak Peeks can come out
- Certifications open
- Get to know your local MAPD carrier reps
- Recruit, hire, and train extra staff for AEP
- Cross-selling campaign
- Start securing places to hold events/kiosks for AEP
- Send out Summer Newsletter



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3rd Quarter

July

- Carrier Rollout Meetings
- More carrier certifications open
- Part B GEP enrollments

August

- Carrier roll outs and product launch meetings
- Supply requests can be taken for AEP
- Certifications are fully available for all MA/PDP carriers
- Make sure all of your new MA/PDP carriers are on Enrollment Express
- Attend AEP Bootcamps

September

- ANOC letters go out
- Continue to certify
- Register any event locations with carriers
- Client appreciation event
- AEP letters prepared
- Research plans in your area
- Supply requests for AEP
- AEP Staff training
 - Take advantage of Senior Marketing Specialist's Virtual Admin Training
- MA/PDP landscapes available (9-24-2020)
 - <https://www.cms.gov/Medicare/Prescription-Drug-Coverage/PrescriptionDrugCovGenIn/>
- Cancer Awareness Month
- Download landscapes to your devices
- Request drug lists
- Send out Fall Newsletter



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4th Quarter

October

- Cost of Living Adjustments (COLA) announced (10-11-2020)
 - https://www.ssa.gov/cola/?fbclid=IwAR0D4kGrXfFbXi0xcosVR10yP3OQRnFO9KAM1_2G77ZhoGnKi2CJ-2mJeGA
- AEP starts!
 - begin marketing 10-1-2020
 - begin taking apps 10-15-2020
- Star Ratings come out (10-14-2020)
 - <https://www.cms.gov/Medicare/Prescription-Drug-Coverage/PrescriptionDrugCovGenIn/PerformanceData.html>
 - <https://www.cms.gov/Medicare/Prescription-Drug-Coverage/PrescriptionDrugCovGenIn/Downloads/2020-Star-Ratings-Fact-Sheet-Oct-10-2019.pdf>
- Medicare and You books mailed to 65+ year old's
- National Health and Education Week
- Breast Cancer Awareness Month

November

- New Medicare costs may be available in November
- DSNP preparation
 - Most are written in December for a January 1 enrollment (full commissions)
- ACA enrollment starts Nov 1st
- U65 Group Reviews
- COPD Awareness / Diabetes Awareness / Caregiver Awareness
- Evaluate your standings with carrier trip, contests, and incentives

December

- Double check to ensure all AEP clients are enrolled
- AEP ends on Dec 7th
- SAR enrollments start Dec 8th
- ACA enrollment ends Dec 15th
- OEP preparation - OEP starts in January
- Supply orders for Medicare Supplements with rate increases in January
- Medicare Supplement enrollments after AEP
- Crohns and Colitis Awareness / Handwashing Awareness
- Set next year's goals
- Send out Winter Newsletter