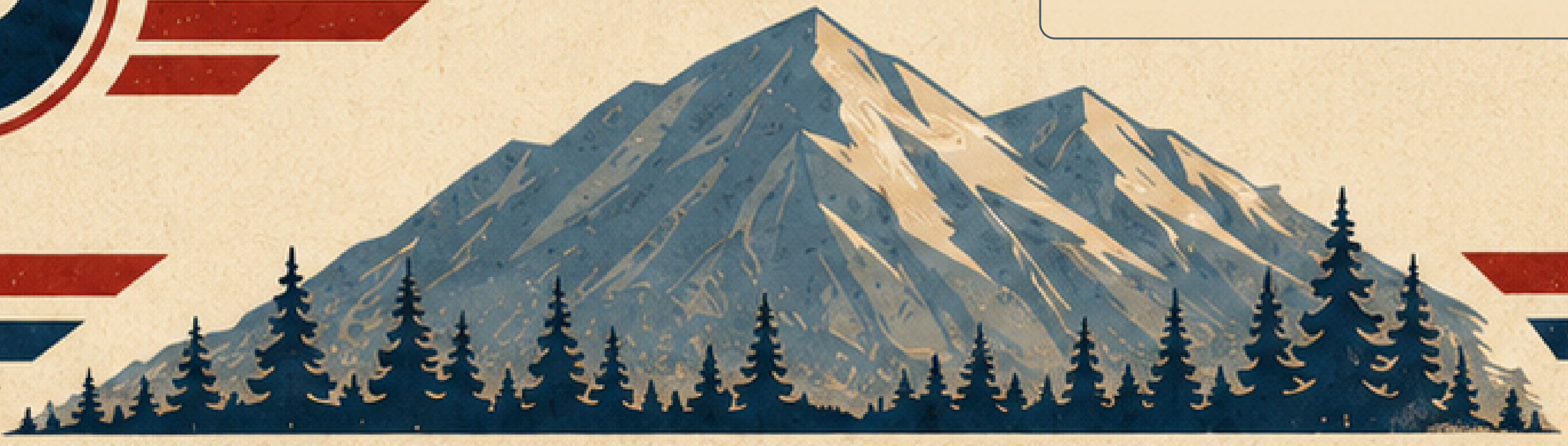
DOWNLOADABLE AGENT RESOURCE

AEP Ready

A PRACTICAL CHECKLIST FOR INDEPENDENT MEDICARE AGENTS

A pre-season planning guide to help Medicare agents organize their business, client book, and workflow before AEP begins.

PSMBrokerage
An AMERILIFE Company



OVERVIEW

AEP Ready

AEP REWARDS PREPARATION.

The goal is not just to be busy. The goal is to be **ready**, organized, compliant, and service-focused before the phones start ringing.

★ 1 ★

STAY ORGANIZED

Build the systems before client volume increases.

★ 2 ★

PRIORITIZE THE BOOK

Identify which clients need reviews, drug checks, provider confirmations, or extra service.

★ 3 ★

PREPARE OUTREACH

Map your communication plan before the season gets crowded.

★ 4 ★

PROTECT RETENTION

Build a smoother follow-up process after enrollment.

“ PREPARATION CREATES CAPACITY. ”

CHECKLIST

The AEP readiness map

Use these workstreams as the backbone of your pre-season prep.

Certifications Core pre-season workstream	**Contracting** Core pre-season workstream	**Carrier Updates** Core pre-season workstream
CRM Cleanup Core pre-season workstream	**Segmentation** Core pre-season workstream	**Marketing Calendar** Core pre-season workstream
Compliance Core pre-season workstream	**Appointments** Core pre-season workstream	**Follow-Up** Core pre-season workstream

SECTION 1

Ready-to-sell foundation

Confirm the basics before the season begins.

1 CERTIFICATIONS

- Complete annual Medicare training
- Finish AHIP or NABIP if required
- Complete carrier certifications

2 CONTRACTING

- Confirm active carrier contracts
- Verify state appointments
- Check writing numbers and portal access

3 CARRIER & MARKET PREP

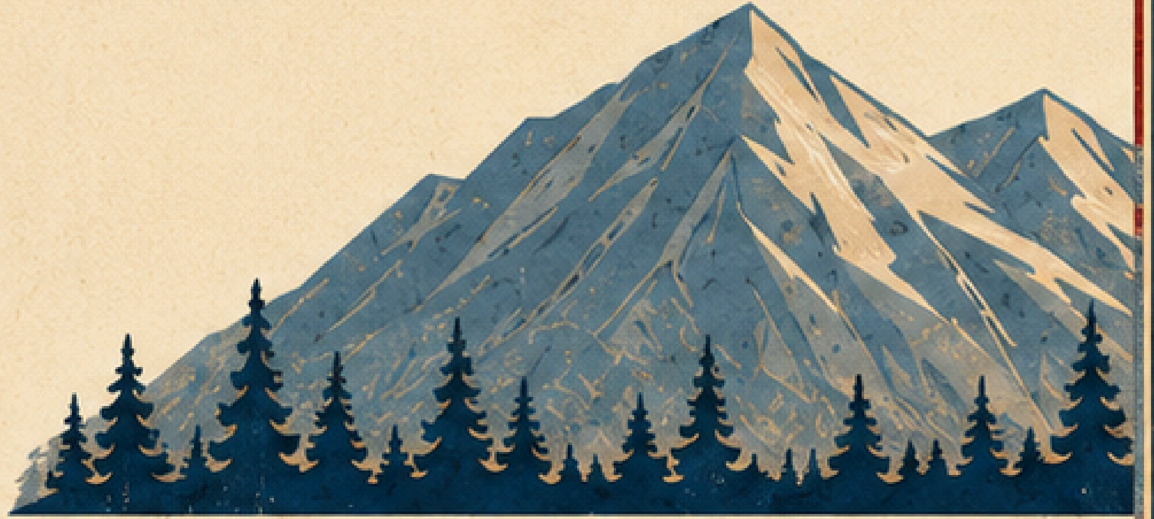
- Review plan changes
- Study network and formulary shifts
- Build county and market notes

DO NOT ASSUME

LAST YEAR'S SETUP CARRIES FORWARD.

SECTION 2

CRM cleanup & client segmentation



AEP gets harder when the data is messy. Start with the right list.

CRM CLEANUP

- Remove duplicates
- Update phone numbers, emails, and addresses
- Add current plan and birthdate details
- Tag MA, PDP, Med Supp, and ancillary clients

SEGMENTATION PRIORITIES

- Medicare Advantage clients
- PDP clients
- Clients with provider concerns
- Prospects who did not enroll last year

Relevant outreach starts with the right list.

SECTION 3

MARKETING CALENDAR & COMPLIANCE

AEP Ready

Start education and scheduling before the season gets crowded.

1

8–10 WEEKS OUT

Prep systems and materials

2

4–6 WEEKS OUT

Start educational outreach

3

DURING AEP

Execute reviews and follow-up

4

AFTER AEP

Shift to retention

COMPLIANCE REVIEW

- Use approved materials when required
- Include required disclaimers
- Follow permission-to-contact rules
- Use SOAs when required

★ Keep outreach educational and service-focused. ★

PSMBrokerage
An AMERILIFE® Company

SECTION 4

APPOINTMENT PREP & CLIENT WORKFLOW

Create one repeatable process before the season begins.

APPOINTMENT PREP

- Confirm current plan
- Collect doctors and specialists
- Review prescriptions and pharmacy
- Note budget or travel concerns

CLIENT WORKFLOW

1 BEFORE	2 REVIEW	3 ENROLLMENT	4 AFTER AEP
Confirm the appointment and what the client should have ready	Document notes and next steps	Confirm submission and explain what happens next	Check ID cards, service issues, and early questions

SECTION 5

FINISH STRONG

Retention and review matter after enrollment.

POST-AEP RETENTION

- Confirm effective dates
- Make sure ID cards arrived
- Help resolve service issues
- Schedule Q1 outreach
- Ask satisfied clients for referrals

QUICK SCORECARD

	COMPLETE	IN PROGRESS	NEEDS ATTENTION
CERTIFICATIONS			
CONTRACTING			
CRM			
MARKETING			
COMPLIANCE			
FOLLOW-UP			

AEP Ready

READY TO GROW WITH PSM BROKERAGE?

PSM Brokerage helps independent Medicare agents prepare for AEP with support across contracting, marketing, compliance, CRM strategy, and business planning.

800-998-7715
www.psmbrokerage.com

DOWNLOADABLE RESOURCE • AEP READY

PSMBrokerage
An AMERILIFE® Company