

Get Ready to Sell & Take Flight with Your AEP Checklist

Maximize AEP success by preparing early, navigating complexities with precision, and ensuring all bases are covered to serve clients effectively.

CONTRACTING

☐ June – Early July

- Secure contracts with all relevant carriers.
- Ensure all necessary paperwork is completed accurately and submitted on time.
- Use an easy online contracting and recruiting options.

AHIP COURSES

☐ Starting June 24

- Enroll in and complete the AHIP courses required for certification.
- Verify the deadline for completing AHIP courses and ensure compliance to maintain certification.

(RE) CERTIFICATION

☐ July

- Certify or recertify with all healthcare insurance carriers you represent.
- Stay updated on certification requirements for each carrier.

PRODUCT TRAININGS

☐ Suggested by August 31

- Attend carrier product trainings to familiarize yourself with plan offerings, benefits and updates.
- Take advantage of online or in-person training sessions. See our web-based Medicare training curriculum today.

MARKETING STRATEGY

☐ July – August

- Develop a comprehensive marketing strategy.
- Plan and schedule marketing campaigns, events, and outreach activities to maximize visibility and engagement.
- Access our compliant and customizable marketing pieces.
- Pre-order materials with carriers.

*Minimum contract requirements needed.

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MN License #20195635 | OK License #0100151962 | TX License #1641424

ORDER SUPPLIES

☐ August

- Assess your inventory of supplies.
- Place orders for additional supplies with specific carriers to ensure you have adequate AEP materials.

COMPLIANCE REVIEW

☐ September

- Review compliance guidelines and regulations set forth by CMS and other regulatory bodies.
- Ensure adherence to all compliance requirements during AEP activities and client interactions.
- Confirm Ready to Sell (RTS) status with each carrier you plan to market or renew plans through.

TECHNOLOGY READINESS

☐ September

- Ensure technology tools and systems are updated and functional.
- Familiarize yourself with any new carrier enrollment/sales software or digital platforms.
- Use free online consumer-facing enrollment platforms (MAPD provider and Rx drug finder), and a Med Supp quoting and enrollment tool.*

CLIENT COMMUNICATION

☐ September – October

- Proactively schedule meetings to review plan options, and address any client questions or concerns.
- Access a free electronic scope-of-appointment tool to keep yourself organized and focused.*



Got Warner Pacific supporting you every step of the way?
Check! If not, contact us today.

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(800) 801-2300