



Call Center AEP Readiness Checklist

Medicare AEP runs Oct 15 to Dec 7. Use this as a quick operational check — the goal is to have staffing, licensing, systems, compliance, and reporting tested before Oct 15.

Agents & Staffing

- ☐ All agents completed AHIP + carrier certifications
- ☐ UHC eAlliance transition and Aetna Call Center Questionnaire completed
- ☐ Agent roster shows Complete, Pending, or Blocked
- ☐ Staffing can handle expected AEP lead and call volume
- ☐ Evening, weekend, PTO, and overflow coverage planned
- ☐ Leads only route to agents licensed/appointed for that market

Leads & Call Center Operations

- ☐ CRM tested at 3–5× normal lead volume
- ☐ Routing tested by state, carrier, licensing, language, availability
- ☐ Overflow and after-hours routing defined
- ☐ Speed-to-lead is tracked
- ☐ Rejected/unworked leads have a clear next step
- ☐ Defined owner for routing exceptions
- ☐ AEP Retention Campaign: opt in by 8/26
- ☐ Plan Exit Campaign: BoB upload 9/7, opt-in 9/25, starts 10/12
- ☐ AI Assistant Disruption Analysis: BoB upload 9/7, delivered early Oct
- ☐ New Plan Enrollment Campaign: opt in by 12/19

Compliance

- ☐ Current CMS/carrier marketing requirements reviewed
- ☐ Marketing materials & scripts submitted for approval (was due 7/31)
- ☐ Required calls are recorded
- ☐ Recordings can be easily retrieved by agent/enrollment
- ☐ Required disclosures are being captured

Compliance Continued

- ☐ SOAs are completed and stored correctly
- ☐ Consent and enrollment documentation are traceable
- ☐ QA process is established before volume increases
- ☐ Compliance exceptions have a named owner
- ☐ IntelligenceX onboarding call scheduled with your Account Manager

Technology

- ☐ CRM/API integrations tested
- ☐ Duplicate lead handling tested
- ☐ User permissions reviewed
- ☐ Manual spreadsheets/re-entry points identified
- ☐ System alerts and compliance flags tested
- ☐ Backup/escalation process exists
- ☐ Blaze transition completed (required by end of August)

Daily AEP Dashboard

Track these every day:

- ☐ Enrollment volume, tracked daily
- ☐ Agent capacity and utilization
- ☐ Conversion by source, lead to enrollment
- ☐ Compliance flag rate, monitored daily
- ☐ Speed to lead, by time of day

Final Go/No-Go Check

- ☐ Every lead reaches the right agent
- ☐ Every enrollment can be traced end to end
- ☐ Leadership can see problems the same day
- ☐ Every exception has a clear owner
- ☐ Workflow tested, not assumed