



Let's gear up for AEP!

The Annual Enrollment Period (AEP) runs from October 15th through December 7th



AEP is almost here—are you ready? Whether you're focusing on your current Book of Business or bringing in new enrollees, UnitedHealthcare has your back every step of the way. Use the checklist below to help prepare for a successful AEP.

Certification and Licensing

- ☐ Complete UnitedHealthcare Certifications: Medicare Basics, Ethics & Compliance, AARP Course, and D-SNP/C-SNP (required before Events Basics) if applicable
- ☐ Confirm you're properly appointed in all licensed states

Product Knowledge

- ☐ Attend a local product overview meeting to learn about the UnitedHealthcare portfolio
- ☐ Review enrollment materials, drug formularies, and the AEP Resources page on Jarvis
- ☐ Use the Medicare Product Portal to compare Medicare Advantage (MA) plans

Marketing and Events

- ☐ Develop a marketing plan with target areas, demographics, and lead strategies
- ☐ Ensure you have all appropriate materials: business cards, brochures, flyers, etc.
- ☐ Connect with providers and pharmacies to share 2026 updates*
- ☐ Create a calendar and confirm dates/times for hosted events
- ☐ Prepare and practice your sales presentations, including a strong, directive close

Technology and Tools

- ☐ Pre-order Enrollment Guides for MA and PDP plans and order Enrollment Kits for Medicare Supplement plans (always available) via the Sales Materials Portal
- ☐ Download the Jarvis app and learn to use tools on Jarvis (e.g., JarvisEnroll, Find a Doctor, Drug Cost Estimator)

Training and Support

- ☐ Attend local and national webinars via Jarvis, including AEP Retention Planning
- ☐ Contact PHD for any additional help, e.g. navigating Jarvis, ordering materials, etc.
- ☐ Reach out to local leadership for assistance with AEP planning

**2026 MA plan benefits cannot be discussed till 10/1*

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Client Engagement*

- ☐ Reconnect with members to reassess health and medication needs
- ☐ Offer needs assessments to ensure plans still meet their goals
- ☐ Explain plan costs, deductibles, and drug tiers*
- ☐ Encourage early health appointment scheduling and app usage with push notifications
- ☐ Promote Reward and Discount Programs*
- ☐ Ask for referrals from satisfied clients

Follow-Up and Retention

- ☐ Review and manage pending applications in Jarvis regularly
- ☐ Send post-AEP thank-you cards and prepare birthday cards for the year
- ☐ Schedule January new member meetings and block time for outreach and follow-ups

Medicare Advantage Prep*

- ☐ Schedule in-person or virtual Annual Notice of Change (ANOC) meetings for existing clients and file them as Sales/Marketing Events to allow plan changes or new enrollments
- ☐ Organize meetings by type: ANOC, Service Area Reduction (SAR) impacts, and new market plans—follow up with leads from your pipeline
- ☐ Emphasize the value of a strong relationship with their PCP for coordinated care
- ☐ Use the Medicare Product Portal to compare UnitedHealthcare Medicare Advantage plans in your market

AARP® Medicare Supplement Insurance Plans from UnitedHealthcare® Prep

- ☐ Watch the Medicare Supplement 101 video and review job aids in Learning Lab to understand plan benefits and why AARP Medicare Supplement Plans may be a good fit for clients
- ☐ Remind members their plan renews automatically if premiums are paid
- ☐ Encourage members to create an account at myAARPMedicare.com
- ☐ Search “MS Member” on the UHC Agent Toolkit for member-facing materials
- ☐ On the Sales Materials Portal, download the state-specific Producer Handbook for plan details, ratings, and discounts. Order Leave Behind materials to help clients understand plan benefits

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Now's the time to strengthen your strategy, sharpen your focus, and ensure every move you make is intentional and impactful. Thank you for your continued support in making us a provider of Medicare plans!



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