

The Essential Post-AEP Operational Assessment Checklist

Optimize, Improve, & Grow After AEP

The Annual Enrollment Period (AEP) has ended, but the opportunity to optimize operations and improve member retention starts now. A post-AEP assessment helps health plans refine strategies, streamline workflows, and enhance member satisfaction for the year ahead. Beyond evaluating enrollment performance, proactive retention efforts are essential to keeping members engaged, reducing churn, and ensuring long-term loyalty. Use this checklist to assess key areas and take strategic action for sustained success.

1. Data Collection and Analysis

- Gather Enrollment Data: Compile data on new enrollments, renewals, and disenrollments.
- Analyze Demographic Trends: Understand who your new enrollees are and their specific needs.
- Examine Retention Dynamics: Evaluate factors influencing member retention and disenrollment to inform future engagement strategies.
- Review Marketing Effectiveness: Assess which marketing channels yielded the best enrollment results.

2. Compliance Review

- Check CMS Guidelines Adherence: Ensure all processes align with CMS regulations specific to Medicare plans.
- Audit Member Communications: Review the accuracy and clarity of all communications sent to members.
- Validate Data Reporting: Ensure timely and accurate reporting of data to CMS for Medicare compliance.

3. Operational Efficiency Assessment

- Evaluate Internal Processes: Assess the efficiency of internal operations during AEP.
- Identify Bottlenecks: Look for any delays or issues in the enrollment process.
- Review Staffing Levels and Training: Ensure adequate staffing and training were in place to handle AEP volumes.

4. Member Experience and Satisfaction

- Gather Member Feedback: Conduct surveys or focus groups to get feedback from members.
- Assess Member Onboarding: Evaluate the effectiveness of your onboarding process.
- Analyze Member Service Interactions: Review call center data and other member service touchpoints.

5. Technology and Systems Audit

- Assess System Performance:** Check if IT systems handled the enrollment period efficiently.
- Review Security Measures:** Ensure member data was securely handled and stored.
- Evaluate Automation and AI Use:** Determine if technology solutions adequately supported the AEP process.

6. Financial Performance Analysis

- Calculate Cost Per Acquisition:** Understand the cost effectiveness of acquiring new members.
- Review Budget Utilization:** Assess how well the AEP budget was managed and allocated.
- Analyze ROI of Marketing Spend:** Evaluate the return on investment for different marketing channels.

7. Plan Improvement Strategy

- Develop Action Plan:** Create a plan to address identified issues and opportunities.
- Set Goals for Next AEP:** Establish clear, measurable goals for the next enrollment period.
- Schedule Follow-Up Assessments:** Plan for ongoing assessments to track improvements and compliance.

Enhance Your Post-AEP Operations with HealthAxis

At HealthAxis, we help healthcare payers optimize operations, improve member engagement, and reduce churn. Our BPaaS and BPO solutions streamline workflows, enhance outreach, and drive efficiency—ensuring long-term retention and success.

By leveraging our expertise, healthcare payers can:

- **Uncover data-driven insights** to refine future enrollment strategies.
- **Enhance member retention** through proactive engagement.
- **Optimize workflows** with automation and efficiency improvements.
- **Scale with confidence** using tailored BPaaS and BPO support.

Retention is key to sustainable growth. HealthAxis helps you engage members early, reduce disenrollment, and create seamless experiences that foster long-term loyalty.

Ready to strengthen retention and optimize post-enrollment operations? Contact HealthAxis today to learn more.

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