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Keeping your wind in the final AEP laps

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Medicare plans are mid-way through the process of creating Annual Election Period (AEP) materials that are due to members by the end of September. At this stage of the game, tension is running high and time is running out.



Preparing AEP materials can be a time-consuming, labor-intensive process wrought with compliance risk. By now, many health plans have likely discovered that the way they were planning on creating the documents won't work, have encountered issues with vendors, or any other number of challenges that put tasks and timelines into a tailspin.

Here's how to push through bottlenecks, solve last-minute challenges and get compliant AEP materials out accurately and on time.

1. Address Critical Timeline Challenges Immediately

If any tasks on your timeline are slipping, focus on addressing the critical missed deadlines as quickly as possible. If your team was having meetings once a week, now is the time to increase meeting frequency to twice a week, or as often as necessary.

In those meetings, emphasize the need to escalate resolution of missed deadlines, and build a support network and assign accountability to ensure these tasks are completed. Create a project team comprised of one person from each department to help resolve any issues impeding progress of those critical tasks. There is no time to let tasks that have slipped into the "red" stay there.

In addition, the marketing communications team should communicate daily, keep management abreast of the status of projects, and stay alert for possible roadblocks that may delay progress.

2. Effectively Manage Subject Matter Experts

A health plan's internal subject matter experts – those in the medical management, pharmacy, product and compliance departments – play a significant role in the AEP materials production timeline. For marketing communications directors, difficulties with obtaining quality information in a timely manner from SMEs can be a serious challenge. It's not uncommon for these challenges to result in pushing the timeline to "red."

When working with SMEs, marketing communications directors should clearly express their needs and anticipate what would be helpful for SMEs to know in advance. For example, educating SMEs on potential compliance issues that may arise while they are preparing content for the documents will help increase the

likelihood that they provide usable content the first time around. If you are using model documents provided by CMS, make it clear that this language cannot be modified, even if there is a grammatical error.

Give SMEs explicit deadlines when you request information. In fact, it's not a bad idea to set SMEs' deadlines a few days in advance of your actual deadlines, to add some cushion to your timeline for unforeseen circumstances. You should also send SMEs reminders prior to their deadlines to ensure they are on schedule. Also, develop a productive relationship with your SMEs. Chances are, stress levels will peak during the process of preparing AEP materials; do your best to remain calm and helpful. For example, rather than simply saying that something can't be done because it's not CMS compliant, be proactive and offer alternative solutions.

3. Keep Notes to Document the Good, Bad and Ugly

Inevitably, you will have moments during the AEP materials creation process when you have ideas for how to do things differently next year. Even though it may be difficult when you're in the midst of high stress and long hours, try to keep notes about what's working and what's not working that you can reference later, with the ultimate goal being to make your life easier the next time around.

After the AEP season concludes, debrief with your team, getting enterprise-wide input. Review your notes, identify your weak spots, and consider what tools and resources may be worthwhile to tap into next year to improve the AEP materials creation process for 2016.

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