

# ICBN

NEXT  LEVEL

WHAT COMES NEXT:

## **AHIP 2026 + Carrier Certification**

What Every Medicare Agent Must Know

*These materials are intended solely for Medicare Insurance Broker training purposes and are not designed for use with clients.*



# What's on the **Agenda**

## **Get certified. Get informed. Get ahead.**

- Cut through the clutter—focus on what matters now
- Timeline-driven checklist to stay ahead of AEP
- Learn to leverage carriers, certifications & plan launches
- Get Ready-to-Sell early and build a stronger pipeline

# Why Agents Fall Behind **& How to Avoid It**

## **Waiting Too Long = Missed Opportunity**

- Delayed certification = lost marketing & selling time
- Plans & benefits shift—agents unaware = uninformed recommendations
- Carrier support, co-op, and events require active RTS status

## **Early Action = Informed & Empowered**

- Build pipeline before Oct 1st
- Strategize plan recommendations now
- Be “present” when opportunities appear



## Key Dates

- **AHIP Certification Launched:** *June 23, 2025*
- **Carrier Certifications Begin:** *July–August 2025*
  - *Aetna, Devoted Health, Humana, & United Healthcare are open*
- **Ready-to-Sell (RTS) Status Deadline:** *ASAP – August/early Sept*

## What to Do Now

- Complete AHIP NOW
- Tackle top carrier certifications first
- Track RTS status with each carrier
- Plan carrier event registrations NOW



# Understanding **“First Looks”** (Aug - Sept)

## **What Are First Looks?**

- Early, non-consumer-facing previews of 2026 plans
- High-level updates: new markets, product types, major changes

## **What They’re NOT:**

- Not detailed benefit info
- Not final or fully approved
- Not actionable for consumers

## **What to Do with Them:**

- Spot sales opportunities (new plan types, withdrawals)
- Begin targeting audience segments based on big shifts



Carrier **Roll-Out Meetings**  
(Sept – Oct)

**Roll-Out Meetings Matter**

- Launch events with finalized plan benefits
- Learn selling angles, compliance reminders, and marketing rules

**What to Expect:**

- Mid–Late September: Specific benefit details revealed
- Order enrollment kits and sales materials
- Confirm co-op and event sponsorships

**Action:**

- Register early for carrier events
- Understand informal vs. formal events; what's required
- Ask about support for your own events



## Unlocking Carrier Partnerships + **Co-op Dollars**

### **Being RTS = Being Eligible**

- Must be certified to receive support
- Carriers often prioritize active agents for lead programs

### **Co-Op Support Includes:**

- Event funding
- Lead generation reimbursement
- Marketing materials
- Local rep support

**Tip:** PROACTIVELY ASK carriers what they'll support—  
DON'T WAIT to be offered!

# **Sell To** or **Against New Plans**

## **Do Your Homework:**

- Look up 2026 benefits as soon as available
- Attend Carrier roll-out meetings
- Compare against last year's offerings
- Identify competitive differentiators

## **Build Your Talking Points:**

- What's better about this plan vs. others?
- Where does it fall short—and who should avoid it?

## **Positioning = Confidence in Sales**





# Build Your Sales Pipeline **Before October 1st**

## **Can't Market MA Plans Yet? No Problem.**

- Obtain Permission to Contact (PTC forms) & Scope of Appointments (SOA); both are valid for a full year
- Prequalify clients
- Educate on Medicare basics
- Schedule October appointments
- Segment book for plan switch opportunities

## **Tactical Prep:**

- Build CRM workflows now
- Update your leads & referral lists
- Use compliant Medicare 101 events



# Tactical Checklist: **What You Should Be Doing NOW**

- ✓ Complete AHIP
- ✓ Finish carrier certifications
- ✓ Check & verify your RTS status
- ✓ Map “First Look” insights to target market
- ✓ Sign up for carrier roll-out meetings
- ✓ Order enrollment kits
- ✓ Confirm co-op support from top carriers
- ✓ **Pre-book client appointments for October**



## Final **Thoughts**

### **Be the Agent Clients Remember**

- When you're certified early, you're available early
- When you're informed, your clients trust your guidance
- When you're strategic, your business grows sustainably

**Get certified. Get visible. Get in front of opportunity.**



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# Thank You!