Medicare AEP Effectuation Scorecard

Use one column per delivery-week, source and territory group. Compare early activity at the same lead age and active coverage at the same interval after the expected effective date.

Group A: _____ Group B: _____

Lead age at early check: _____ Expected effective date: _____ Active-status check: _____

Metric	Group A	Group B
Lead spend		
Unique leads delivered		
Unique two-way contacts		
Reviews held		
Unique applications submitted		
Carrier receipt verified		
Pending / not yet verified active		
Closed without activation		
Confirmed active at review date		
Lead spend ÷ submitted applications		
Confirmed active ÷ submitted applications		
Lead spend ÷ confirmed active enrollments		

Carrier receipt is a checkpoint, not a final status. Count each submitted application once across pending/unverified, closed without activation, or confirmed active as of the review date. If the denominator is zero, mark the rate or cost N/A. Use aggregate data here, not beneficiary identifiers.

Where did the numbers first diverge?

Stage and reason: _____

Next action: _____ Owner: _____ Due: _____