

# GME Producer Checklist



## Suggested Steps for Successful GME Cases

Timing	Action
November-December	<ul style="list-style-type: none"> <li>Send initial communications to residents and fellows who graduate in spring to introduce yourself and the GME Offer, and invite them to upcoming seminars.</li> <li>If you haven't yet, sharpen your eApp skills by asking The Standard for a refresher course.</li> </ul>
January-March	<ul style="list-style-type: none"> <li>Make appointments with residents and fellows. Continue to educate on GME needs and opportunity.</li> </ul>
January-June	<ul style="list-style-type: none"> <li>Send mailings, postcards, emails and other communications. Tell them how easy the process is with eApp.</li> <li>Meet with residents and fellows (and their spouses or partners).</li> </ul>
February-March	<ul style="list-style-type: none"> <li>All residents should now have employment contracts. Follow-up on one-step opportunities.</li> </ul>
May	<ul style="list-style-type: none"> <li>Send follow-up letters and increase notices to enrollees from earlier years. Please note, The Standard sends increase notices approximately 60 days before each option date.</li> <li>Help policyowners complete increase applications.</li> <li>Partner with your institution so you can participate in orientation, discuss financial security, and raise awareness of your program and ease of application.</li> <li>Confirm all new chief residents and program coordinators.</li> </ul>
May-July	<ul style="list-style-type: none"> <li>Attend or participate in department meetings and online conferences to gain visibility and give presentations about your offering.</li> <li>Host informational meetings and webinars for residents and fellows (and their spouses or partners).</li> </ul>

**For producer use only.  
Not for use with consumers.**

*continued on next page*

## Common Steps in Successful GME Cases (continued)

Timing	Action
June	<ul style="list-style-type: none"><li>• Coordinate with administration on enrollment, materials and communications:<ul style="list-style-type: none"><li>— Share materials and communications for feedback.</li><li>— Coordinate communication efforts with them. Ask to be featured in institution communications, such as newsletters or emails.</li><li>— Schedule events and webinars for the spring.</li><li>— Introduce yourself to prospects with a personal communication.</li></ul></li><li>• Send last-chance communications to residents and fellows who are completing their programs.</li><li>• Start taking applications for new residents and new fellows of your program.</li><li>• Finalize placement of applicants.</li><li>• Through Aug. 31, continue to enroll eligible residents and fellows who have finished their programs.</li></ul>
July-August	<ul style="list-style-type: none"><li>• Follow up with recent enrollees to capture their new contact information.</li><li>• Follow up with policyowners who have moved from residency to fellowship. Discuss if they want to increase coverage.</li></ul>
September	<ul style="list-style-type: none"><li>• Prepare for the next year:<ul style="list-style-type: none"><li>— Work with institution administration to collect census data for residents and fellows.</li><li>— Request letter of recommendation or introductory emails to department heads.</li></ul></li></ul>