



How a Large Health Plan Retained 95% of Its Medicare Members with Medicare Retention Suite

Retention Case Study

Challenge

Health Plan customer faced a major challenge when several plans were leaving a service area, requiring beneficiaries to re-enroll in new plans.

Unfortunately, they missed the deadline to submit their crosswalk to CMS (where members are mapped to a new plan automatically when the original plan is no longer available). Given this missed opportunity to facilitate automatic plan enrollment, they were at a significant risk of losing members during plan transitions.

Solution

To address this challenge, the health plan turned to the Medicare Retention Suite. They leveraged key features to simplify the re-enrollment process and keep members informed:

- **Plan Comparison Tool:** Beneficiaries could easily compare their current plan with new plan options side-by-side, making it simpler to understand changes and select a suitable alternative.
- **Multi-Channel Outreach Campaign:** A direct mail and email campaign informed members about the changes and guided them to a secure Retention Management (RM) site for a tailored experience.
- **User-Friendly RM Site:** Members accessed the RM site through a dedicated link (PURLs) and PINs, enabling a secure, seamless re-enrollment process.

Results - The health plan's proactive approach paid off.

- Out of 9,000 affected members, 900 independently re-enrolled using the RM site.
- An impressive 95% retention rate was achieved overall, minimizing member loss and reinforcing trust in the health plan.

Interested in Medicare Retention Suite? Get started in four easy steps:

1. **Add a consumer page** – Set up Retention Suite on your PlanCompare ONE site for members to access
2. **Preload data** – Member eligibility, drugs claim data and personal demographics
3. **Tailored communication** – Guide members based their need:
 - a. Transitioning from U65 group insurance to Medicare
 - b. Seeking alternatives for drugs no longer covered
 - c. Choosing a new plan if their current plan is being sunsetted/terminated
4. **Secure access:** Provide each member with their own secure link (PURL) and PIN to access their personalized plan options, and more.