

SHOP & ENROLL

Remote Enrollment Cheat Sheet

Compliance

Please note, failure to follow the rules below may result in termination of your Shop & Enroll page, among other penalties. If you have questions, please reach out to complianceofficer@ritterim.com or support@shopandenroll.com.

All applications done through Shop & Enroll require a Scope of Appointment.

A full plan presentation must be done for **all** Shop & Enroll enrollments.

An agent may **never** sign an application or Scope of Appointment on behalf of a beneficiary.

Scopes of Appointment (SOAs)

Beneficiary Signature

1. Log in to the Platform at App.RitterIM.com, then go to the **Clients** tab.
2. Find the client's record within your client list. If the client doesn't have a record, you will need to create one.
3. Make sure the client either has an email address or a mobile number confirmed for texting.
4. Send out the SOA by clicking **Request** under the **eScopes** column. Your client will receive an email or text with a link to a prefilled SOA.
5. The beneficiary will need to review the information, enter their name twice, and click **Submit** to sign the SOA.

Agent Signature

1. Log in to the Platform at App.RitterIM.com, then go to the **Clients** tab.
2. Find the client's record within your client list and click their name to open their record.
3. Click on the **eScopes** tab at the top of the page.
4. Click **Sign** to complete your portion of the SOA.

FastTrack Prefilled Enrollment Applications

FastTrack enrollments allow agents to prefill an application before an appointment, in person or remote. The agent can complete the entire application, except the attestation and signature, which must be completed by the beneficiary.

Preparing the Client

1. Make sure your client has an SOA. If they do not, follow the steps under Scopes of Appointment.
2. Log in to the Platform at App.RitterIM.com, then go to the **Clients** tab.
3. Find the client's record within your client list. If the client doesn't have a record, you will need to create one. Click on the client's name to open their record.
4. Fill out the **General** tab. For remote enrollment, a client record needs either an email address or a verified mobile number, a date of birth, and their Medicare Beneficiary Identifier.

Accessing & Prefilling the Application

1. Log in to the Platform at App.RitterIM.com, then go to the **Clients** tab and find your client.
2. Search for plans by running a quote for the beneficiary. To do this, click the **Calculator** button to the left of the client's name on the main view of the **Clients** tab or click the orange **Calculator** button in the upper-right hand corner of the client's record.
3. Confirm you're quoting the correct effective date, zip code, and product type at the top of the screen.
4. Navigate to the correct plan and click the small **Pencil** icon to the left of the plan name. Click **Yes** to confirm that you want to start the enrollment. This button will only appear if the plan is able to be sold through Shop & Enroll and the agent is contracted and ready-to-sell through Ritter.
5. Fill out the application entirely. Clicking **Save** in the bottom left-hand corner saves any updates and displays what still needs completed on the right-hand side of the screen.
6. Once saved, the agent can leave the application and return to it later, if needed, via the **Submissions** tab. Once the application has been filled out completely, the agent can move to the signature steps.

Signing the Application

1. At the bottom of the application in **Key Entry** mode, click **Publish to Email** or **Publish to Text**.
2. Your client will receive either an email or text with a link to their Shop & Enroll application. Have your client open that link.
3. The client needs to enter their last name, date of birth, and Medicare Beneficiary Identifier to access the application.
4. Once the client reviews the application and answers any remaining questions, they must check the attestation, sign their name by typing it twice at the bottom of the application, and click **Submit**.
5. The application will be processed by Ritter, and you and your client will receive the standard confirmations.