

# OEP Ready-to-Sell Checklist

## New Agents



01

### CERTIFICATION

August

#### WHY

Agents and brokers are required to take the Individual Marketplace training for the upcoming plan year based off the states that they want to sell in.

#### HOW

##### **Federal Exchange States**

1. Agents and brokers who are **new to the marketplace** this year, or who did not complete plan year 2022 registration and training, are required to take the full Individual Marketplace training for plan year 2023.
2. New agents and brokers can take Individual Marketplace training through the MLMS or the HHS approved vendor.

##### **State-Based Exchange States**

1. **Pennsylvania**
2. **Maryland**
3. **New Jersey**
4. **Georgia**
5. **Virginia**

\*Georgia and Virginia are on the federal platform for 2023. Final regulatory approval is still pending for their 2024 transition to state-based marketplaces.

02

### CONTRACT

August – September

#### WHY

Agents and brokers must contract with carriers available in their market within the states they have credible lines of authority in.

#### HOW

1. This can be viewed by visiting the **Ritter Platform**
2. Select Contracts
3. Select Contract Now
4. Select "Under 65 Health" as the product
5. Select states that you're licensed in

You can also reach out to your **sales specialist** for assistance and recommendations.

03

### TRAINING & RESOURCES

September – October

#### WHY

Ritter wants you to succeed by offering your clients the best service possible. Reviewing these trainings and resources will help you become familiar with the processes and procedures that go into selling ACA.

#### HOW

1. **U65 Health Product Page**
2. **Ritter Blog**
3. **Agent Survival Guide Podcast**
4. **ACA eBook**
5. **Knight School**
6. **Events**

04

### MARKET

October – November

#### WHY

Increase your sales by utilizing retail marketing and connecting with your local community. Many carriers also have marketing pieces you can use, either carrier-branded or generic, so make sure you are familiar with the carrier portals and available resources.

#### HOW

1. Help On Demand
2. Retail/Community-Based Marketing
3. Social Media
4. Carrier Marketing Materials

05

### QUOTE & ENROLL

November – January

#### WHY

Quote and enroll to help your clients get the coverage they need!

#### HOW

##### **Federal Exchange State Enrollment Platforms**

1. **HealthSherpa**
2. Use a certified enrollment partner's website for **direct enrollment**
3. **HealthCare.gov**

##### **State-Based Exchange State Enrollment Platforms**

1. **Pennsylvania**
2. **Maryland**
3. **New Jersey**
4. **Georgia**
5. **Virginia**

SBM and EDE are available for Georgia

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Remember, Ritter is here to help you succeed! If you have questions or need help with anything, don't hesitate to reach out to us.

# OEP Ready-to-Sell Checklist

## Returning Agents



01

### CONTRACT EARLY

July – August

#### WHY

Agents and brokers must contract with carriers available in their market within the states they have credible lines of authority in. You're able to do this early prior to the upcoming plan year certification becomes available.

#### HOW

1. This can be viewed by visiting the [Ritter Platform](#)
2. Select Contracts
3. Select Contract Now
4. Select "Under 65 Health" as the product
5. Select states that you're licensed in

You can also reach out to your [sales specialist](#) for assistance and recommendations.

02

### RECERTIFY

August | Deadlines – October

#### WHY

Agents and brokers are required to take recertification courses to sell individual marketplace plans for the upcoming plan year.

#### HOW

#### Federal Exchange States

1. Agents and brokers who completed the previous plan year registration and training are eligible to take shorter training.
2. **Returning agents and brokers** will be automatically enrolled in the Marketplace Training for Returning Agents and Brokers, a shorter training that can be completed in approximately 60 minutes.
3. Returning agents and brokers can take training through the MLMS or the HHS approved vendor.

#### State-Based Exchange States

1. [Pennsylvania](#)
2. [Maryland](#)
3. [New Jersey](#)
4. [Georgia](#)
5. [Virginia](#)

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03

### TRAINING & RESOURCES

September – October

#### WHY

Ritter wants you to succeed by offering your clients the best service possible. Reviewing these trainings and resources will help you become familiar with the processes and procedures that go into selling ACA plans.

#### HOW

1. [U65 Health Product Page](#)
2. [Ritter Blog](#)
3. [Agent Survival Guide Podcast](#)
4. [ACA eBook](#)
5. [Knight School](#)
6. [Events](#)
7. U65 Support Email: [U65HealthSupport@RitterIM.com](mailto:U65HealthSupport@RitterIM.com)

04

### MARKET

October – November

#### WHY

Increase your sales by utilizing retail marketing and connecting with your local community. Many carriers also have marketing pieces you can use, either carrier-branded or generic, so make sure you are familiar with the carrier portals and available resources.

#### HOW

1. Help On Demand
2. Retail/Community-Based Marketing
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05

### QUOTE & ENROLL

November – January

#### WHY

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#### HOW

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