

OEP Ready-to-Sell Checklist

New Agents



01

CERTIFICATION

August

WHY

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

HOW

Federal Exchange States

Agents and brokers who are **new to the marketplace** this year, or who did not complete the prior plan year's registration and training, are required to take the full Individual Marketplace training for the next plan year.

Agents and brokers can take Individual Marketplace training through the MLMS or the HHS-approved vendor.

State-Based Marketplaces (SBMs)

Agents and brokers selling in SBMs, need to complete state-specific training. Access our **Certification Center** to find the links to these trainings.

Note: You must log in to [Docs.RitterIM.com](https://docs.ritterim.com) to access all certification information.

02

CONTRACT

August – September

HOW

1. Log in to the **Ritter Platform**.
2. Select **Contracts** then **Contract Now.***
3. Select **Under 65 Health** as the product.
4. Select states that you're licensed in.
5. Follow the prompts to submit.

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

Agents newly registered with Ritter must speak with their sales specialist to unlock **Contract Now.*

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

- **U65 Health Product Page**
- **Ritter Blog**
- **Agent Survival Guide Podcast**
- **ACA eBook**
- **Knight School**
- **Events**
- **Surviving OEP Page**

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

- **Help On Demand**
- Retail/**Community-Based Marketing**
- **Social Media**
- 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

- **HealthSherpa**
- A certified enrollment partner's website for **direct enrollment**
- **HealthCare.gov**

SBM Enrollment Platforms

- **Colorado**
- **Georgia**
- **Kentucky**
- **Maryland**
- **New Jersey**
- **New York**
- **Pennsylvania**
- **Virginia**

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. Log in to the [Ritter Platform](#).
2. Select **Contracts** then **Contract Now**.*
3. Select **Under 65 Health** as the product.
4. Select states that you're licensed in.
5. Follow the prompts to submit.

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

*Agents newly registered with Ritter must speak with their sales specialist to unlock **Contract Now**.

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

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.

Agents and brokers can take training through the MLMS or the HHS-approved vendor.

State-Based Marketplaces (SBMs)

Agents and brokers selling in SBMs, need to complete state-specific training. Access our [Certification Center](#) to find the links to these trainings.

Note: You must log in to [Docs.RitterIM.com](#) to access all certification information.

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

- [U65 Health Product Page](#)
- [Ritter Blog](#)
- [Agent Survival Guide Podcast](#)
- [ACA eBook](#)
- [Knight School](#)
- [Events](#)
- [Surviving OEP Page](#)
- U65HealthSupport@RitterIM.com (email)

04

MARKET

October – November

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HOW

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