

SHOP & ENROLL Phaseout Frequently Asked Questions



Please review the selection of questions and answers below to learn more about Ritter's migration from Shop & Enroll to Integrity's PlanEnroll. Then, [please complete this form](#).

General

Why is Shop & Enroll being phased out?

As partners of Integrity, we want to lead with them, not compete with them.. As we bring all the best insurance technology resources together and work in unison, we've chosen to put our full development support behind the Integrity Suite of Technology, including the MedicareCENTER client relationship manager and the PlanEnroll quoting and enrollment platform.

When is the last day I can collect enrollments through my Shop & Enroll site?

You can collect enrollments on Shop & Enroll through August 31, 2024.

Will I lose historical data for enrollments completed on Shop & Enroll?

No. Enrollments you've collected through Shop & Enroll will remain within our secure database and available to you through your [Submissions](#) tab in the Ritter Platform.

Will I still have access to the Ritter Platform?

Yes. We are still maintaining the Platform.

You'll retain Platform access for things like [quoting](#), [contracts](#), and [commissions](#), as well as read-only access to the [Clients CRM \(client relationship manager\)](#). You will also still be able to access [Docs](#), the [Certification Center](#), [First Looks](#), and more. In short, you'll still have insight into everything your Ritter login gets you today.

Please note the **Submissions** tab will only show insight into business submitted prior to September 1, 2024.

Will all carriers that currently offer online enrollment on Shop & Enroll still exist on PlanEnroll?

We are in discussions with all carriers currently on Shop & Enroll to facilitate enrollment availability on PlanEnroll. We expect the same carriers will be available for 2025 enrollments.

Will Ritter still process paper apps?

No. August 31, 2024, is the last day Ritter will accept paper applications for processing.

Can I submit paper apps directly to the carrier?

Instructions for sending paper applications directly to carriers are available on [Ritter Docs carrier pages](#).

Next Steps to Using MedicareCENTER

Do I need to take action, or will Ritter automatically set me up with a MedicareCENTER account?

If you've created a client record in the Platform since 2022 or have a Shop & Enroll page, Ritter has already set up your MedicareCENTER account for you. Follow the instructions below to set your new password.

Do I need to take action, or will Ritter automatically set me up with a PlanEnroll Personal Agent Website?

If you've created a client record in the Platform since 2022 or have a Shop & Enroll page, Ritter has already set up your PlanEnroll Personal Agent Website for you. [Read below to learn about your site.](#)

When will I have access to MedicareCENTER?

You have access to your MedicareCENTER account and PlanEnroll site today. We will be migrating data from the Platform to MedicareCENTER between now and September 1 and will notify you when that data migration is complete.

How do I log in to MedicareCENTER?

Can I use my RitterIM/Platform credentials?

Your NPN will be your username for all Integrity applications.

Follow these steps to set your new password and access these tools.

1. Visit **Integrity.com**
2. Click **Login**
3. Select **Forgot Password?**
4. Enter your NPN
5. You'll receive a password reset email from Integrity.
Click the **Reset Now** link in this email.
6. Set your MedicareCENTER password

Your RitterIM/Platform credentials will **not** work to access Integrity tools.

I already have a MedicareCENTER account.

Do I need to worry about merging accounts?

No. Integrity uses NPN as a unique identifier, so you can only have one account. We have only set up MedicareCENTER accounts for qualifying agents who did not have one before.

How can I learn more about Integrity's tools?

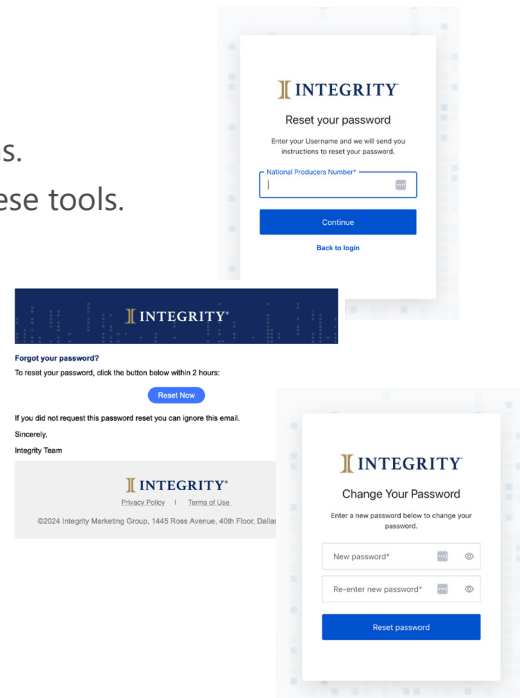
We've modified our recurring Sales Technology webinar schedule to highlight Integrity tools including MedicareCENTER, PlanEnroll, LeadCENTER, and more. Check out available trainings at RitterIM.com/events.

Additionally, within MedicareCENTER, you can access Integrity's Learning Center, featuring documentation for New and Returning Users, as well as Integrity's Training Schedule, plus much more.

Will I need to recontract within MedicareCENTER?

No. Our data team has ensured all of your current contracts and ready-to-sell statuses are recognized by Integrity's applications.

You will still utilize the [Platform's Contract Now](#) feature to add new contracts.



Does MedicareCENTER have an administrative login that allows unlicensed office staff to assist agents with various administrative needs?

No. This feature does not exist on MedicareCENTER.

The PlanEnroll page includes information for final expense. Do I need to take any action?

Final expense quoting is included on all PlanEnroll sites, even if you're not ready-to-sell with final expense plans. We highly recommend getting contracted with a final expense plan to make the most of this product feature. [Please contact your sales rep](#) to learn about our recommended final expense contracts.

PlanEnroll Marketing & AEP Preparation


Will Ritter redirect my Shop & Enroll URL (ex. ShopandEnroll.com/greatagent) to my new PlanEnroll URL?

Yes. Your old Shop & Enroll URL will redirect to your new PlanEnroll URL on September 1.

Note: Your "agent slug," known on PlanEnroll as a personal URL (PURL), **will not** remain the same. You can copy your PlanEnroll PURL link within your [MedicareCENTER dashboard](#).

Agent Website

Send your personalized link to the client to get them started with shopping for plans. Don't worry, you will get credit if the consumer enrolls in any of these plans.

Copy Link 

I have multiple Shop & Enroll sites. Will Ritter set up sites and redirects for each of these slugs?

No. Agents can only have a single PlanEnroll site. We will redirect all Shop & Enroll sites to your single PlanEnroll site on September 1.

Will my CallVault phone number be rerouted to my Integrity Call Recording number?

CallVault phone numbers are part of our data migration to MedicareCENTER.

1. *If we set up your MedicareCENTER account for you, you'll retain your CallVault phone number for call recording in MedicareCENTER.*
2. *If you have set up a MedicareCENTER account on your own, our sales technology team will reach out to you to determine which phone number you'd prefer we keep for call recording.*

Until we migrate your client data ([see below](#)), recordings for all inbound calls and any outbound calls initiated through the Ritter Platform will be stored in the Platform. Any outbound call initiated from a MedicareCENTER contact, the recording will be in MedicareCENTER.

Following the data migration, previous call recordings will still be accessible via the Platform. All future call recordings will be available in MedicareCENTER.

Are there marketing materials available to promote my new PlanEnroll site?

You can create PlanEnroll direct mail postcards to [market your site through LeadCENTER](#).

Campaigns through [LeadCENTER](#) can also direct real-time beneficiary leads in your area to you.

Additionally, your PlanEnroll Personal Agent Website features an integrated Learning Center for beneficiaries to learn about the parts of Medicare and their options. You can link to any of these resources in communications with leads, prospects, and clients.

Will Ritter reimburse me for previously purchased Shop & Enroll materials from ShopRitterIM?

Yes. Ritter will provide reimbursement in the form of LeadCENTER vouchers for the dollar amount you spent on Shop & Enroll materials from ShopRitterIM from April 1, 2024, to July 1, 2024. Please [contact Ritter's sales technology team](#) to receive your LeadCENTER voucher if you qualify..

Orders for Shop & Enroll materials on ShopRitterIM.com will be rejected as of July 1, 2024.

Scope Management

What should I do with my Shop & Enroll eScopes?

Shop & Enroll eScopes collected before September 1 will remain available to you to sign in your Platform CRM.

How do I attach paper scopes to a client on MedicareCENTER?

Paper or generic Scopes cannot be attached to a client record within MedicareCENTER. You'll need to securely retain these documents for yourself. Over the next few weeks, we'll notify you of our recommended scope storage methods.

Data Migration

What data will be migrated from the Platform's Client CRM to MedicareCENTER?

It's our goal to migrate as much of your existing client data as possible, though we're still exploring how each piece fits within MedicareCENTER's structure.

Notes on client records within the Platform will be consolidated into a single note on MedicareCENTER. Attachments to client records will **not** be migrated.

When will the data migration take place?

We will migrate this data between now and September 1. We'll inform you when this job is complete so you can begin using MedicareCENTER and PlanEnroll to their fullest.

If I already have Contact data in MedicareCENTER, will it be overwritten?

No. We will not overwrite existing data. We will, however, attempt to load data for clients who do not exist in your MedicareCENTER account now.

Will I be able to access Ritter Platform data after September 1?

We will keep your data, including notes, in a read-only status in the **Clients** tab of the Platform. After September 1, you'll no longer be able to edit client data on the Platform.

Will my PlanEnroll submissions and commissions populate in the Ritter Platform?

Submissions completed through PlanEnroll will **not** populate within the **Submissions** tab of the Ritter Platform.

Commissions for all business paid out by Ritter will still be visible in the **Commissions** tab of the Ritter Platform.

I have shared clients with downlines in the Platform. Will I retain access to this data on MedicareCENTER?

No. You will lose access to client data on MedicareCENTER that is not assigned solely to your NPN.

There is no concept of sharing contacts in MedicareCENTER. Based on our interpretations of the Final Rule's regulations about express consent, we don't expect to build this feature into MedicareCENTER.

We hope these answers help you understand why and how we're moving to PlanEnroll. Please complete our feedback form so we can provide you with personal assistance with this transition before AEP.

[**Give Us Your Feedback**](#)