There are four fields required before you can begin the Agent Assisted Electronic Application.

Please ensure you are prepared in advance with the following **required fields**:

- Agent ID
- Appointment ID – this ID is generated from either a call to the Appointment Verification Line (AVL) or through the Mobile Scope of Appointment (SOA) Application
- Zip Code
- Street Address – this field is for ONLY the numbers in the street address. (Ex: If the address is 123 Main Street, enter 123)
Access the Agent Assisted E-App

**Step One:** Access the Agent Assisted Application and enter the required fields.

*Your appointment ID is generated from the mobile scope of appointment or AVL call.*
Step Two: Select the desired effective date and plan from the dropdown boxes. Note: DSNP plans will ONLY display as available options if an SPOP verification has been completed.
Step Three: Enter the Enrollment Application by selecting the “Continue Enrollment Application” button.
**Step Four:** Confirm that the beneficiary meets all requirements for enrollment, and select “Enroll Now”.

![Screen Shot of Enrollment Process](image-url)
Step Five: Select the correct Enrollment Period, then select Next.
Enter Personal Information

**Step Six:** Complete the required *Personal Information* fields, including contact information and Medicare number and Part A & B effective dates.
Step Seven: Complete all required questions with the beneficiary including plan premium options, End Stage Renal Disease (ESRD) disclosure and Primary Care Physician (PCP) selection.
Step Eight: Review the Statements of Understanding with the beneficiary and indicate whether the beneficiary is enrolling themselves or is being enrolled/assisted by a legal representative.
Step Nine: If the beneficiary agrees and is ready to continue, instruct them to complete the electronic signature. This must be completed by the beneficiary or their legal representative.
Step Ten: Review all information on the review page for accuracy.
Submit the Electronic Application

Step Eleven: Once you’ve confirmed all information on the application is correct, select “I Agree” to complete the application.