



HealthSherpa Agent Platform Training

Prepared for HealthSherpa's Carrier Agents

Agenda

1. [What is EDE?](#)
2. [Agent Platform](#)
3. [Quoting](#)
4. [EDE Application](#)
5. [Post Enrollment Tools](#)
6. [Client Self Enrollment \(Marketing link\)](#)
7. [Resources](#)

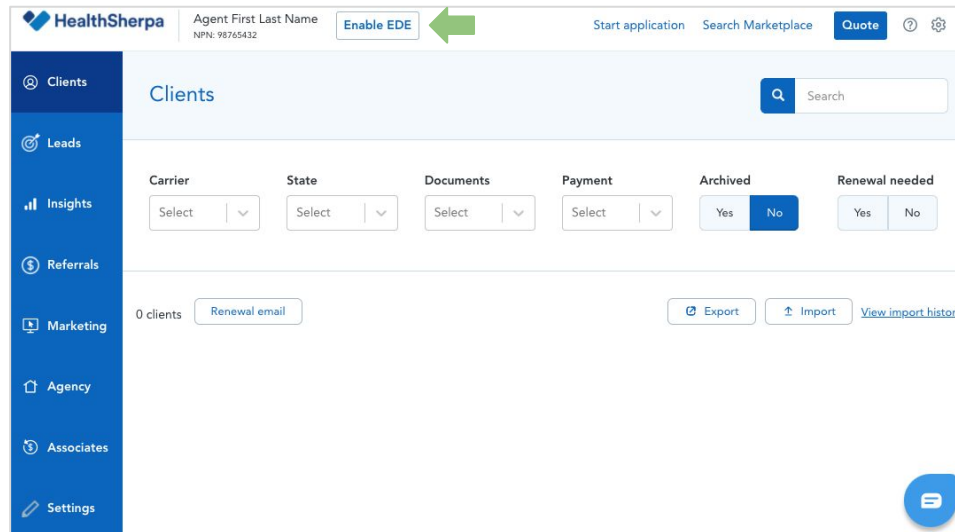


EDE-enable Everyone!

Enable EDE to get the most out of your HealthSherpa platform and maximize your ACA production

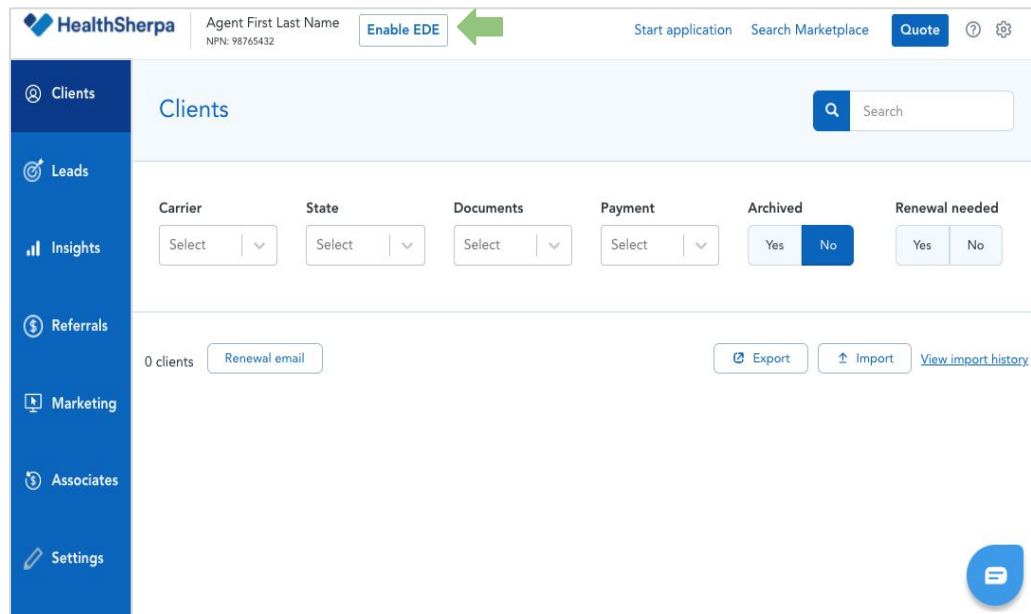
What is Enhanced Direct Enrollment (EDE)?

- EDE is a CMS technology - [read their FAQ](#)
- EDE allows HealthSherpa to fully integrate with HealthCare.gov to submit applications without being redirected to HealthCare.gov.
- With EDE, you'll get a dynamic and streamlined application **allowing you to complete an application in 9 mins compared to 30 min on HC.gov**
- With HealthSherpa's faster and easier alternative to Healthcare.gov, you'll have the leading-edge technology you need to maximize your Marketplace experience.



With EDE, you can:

- Complete applications directly on HealthSherpa
- Improve client effectuation:
 - Document management
 - Direct payment links
- Save time with pre-filled renewals
- View real time status updates and required Marketplace documents
- View and print
 - 1095 A forms
 - Eligibility letters
 - Marketplace notices



3 Phases of EDE

All EDE implementations are not created equally:

Entities have the option to implement phase III of EDE



Live Today

PHASE I

% of Cases Covered

~60%

HH Circumstances Covered

Simple Cases only

PHASE II

% of Cases Covered

~95%

HH Circumstances Covered

Phase I + Students, Naturalized & Non US Citizens, Pregnant applicants, step children, grandchildren, foster care

PHASE III

% of Cases Covered

100%

HH Circumstances Covered


Phase I + Phase II + Rare tax circumstances: Not filing, married, but not filing jointly, child not on tax return, dependents over 25



Platform Overview


Start Application


- Start, search or continue an application from the 'Start Application'.





Agent Name
NPN: 17169718


[Start application](#)
[Search Marketplace](#)
[Quote](#)
?
⚙️


 Clients


 Leads

 Insights

 Referrals

 Marketing

 Associates

 Settings

Clients

Carrier

State

Documents

Payment

Archived

Renewal needed

Select

Select

Select

Select

Yes No

Yes No

60 clients
[Renewal email](#)



[Export](#)
[Import](#)
[View import histor](#)

<input type="checkbox"/>	Client	Plan	Gross premium	Net premium	Effective	Created	Documents	Payment	Actions
<input type="checkbox"/>	Dwayne Curtis Email	Ambetter Essential Care 1 (2020)	\$356.39	\$356.39	4/1/20	3/12/20	🔴 Action needed 🔄 As of 3/12/2020	🔴 Action needed 🔄 As of 3/12/2020	View
<input type="checkbox"/>	Mickey Mouse Email	AdvanceHealth HMO 6500 73AV	\$422.90	\$181.90	4/1/20	2/14/20	🔴 Action needed 🔄 As of 2/14/2020	🔴 Action needed 🔄 As of 2/14/2020	View

Search Marketplace

- With EDE, you'll have the ability to search any Marketplace client.
- Quickly import any existing Marketplace application to your HealthSherpa dashboard.

[Start application](#) [Search Marketplace](#) [Quote](#) [?](#) [⚙️](#)

  [Español](#)

Search for an application

Add any existing Marketplace application to your dashboard

First name

Last name

Date of birth

Coverage state ⓘ

Select state

▼

☐ I've received permission from this consumer to work on their behalf.

[Search](#)

With EDE, working with apps is easy!

Search for any Marketplace app and add it to your dashboard. From your dashboard you can:

- See enrollments and follow-up status
- Make payments & report changes
- Changes & renew plans

You can also search in Healthcare.gov. ⓘ

Select your client's state

Select client state

▼


[Search at HealthCare.gov](#)

By selecting a result, you attest that you are speaking to and have permission from the consumer to access their information.

[Add to clients](#)


Clients Tab


- Displays all your successfully enrolled applications. This tab give you access to book of business reporting, bulk renewal emails and overview of your clients statuses.
- Click on a client's name to view their details page.





Agent Name
NPN: 17169718


[Start application](#)
[Search Marketplace](#)
[Quote](#)
?
⚙️


 Clients


 Leads

 Insights

 Referrals

 Marketing

 Associates

 Settings

Clients

Carrier

State

Documents

Payment

Archived

Renewal needed

Select

Select

Select

Select





Yes No

Yes No

60 clients

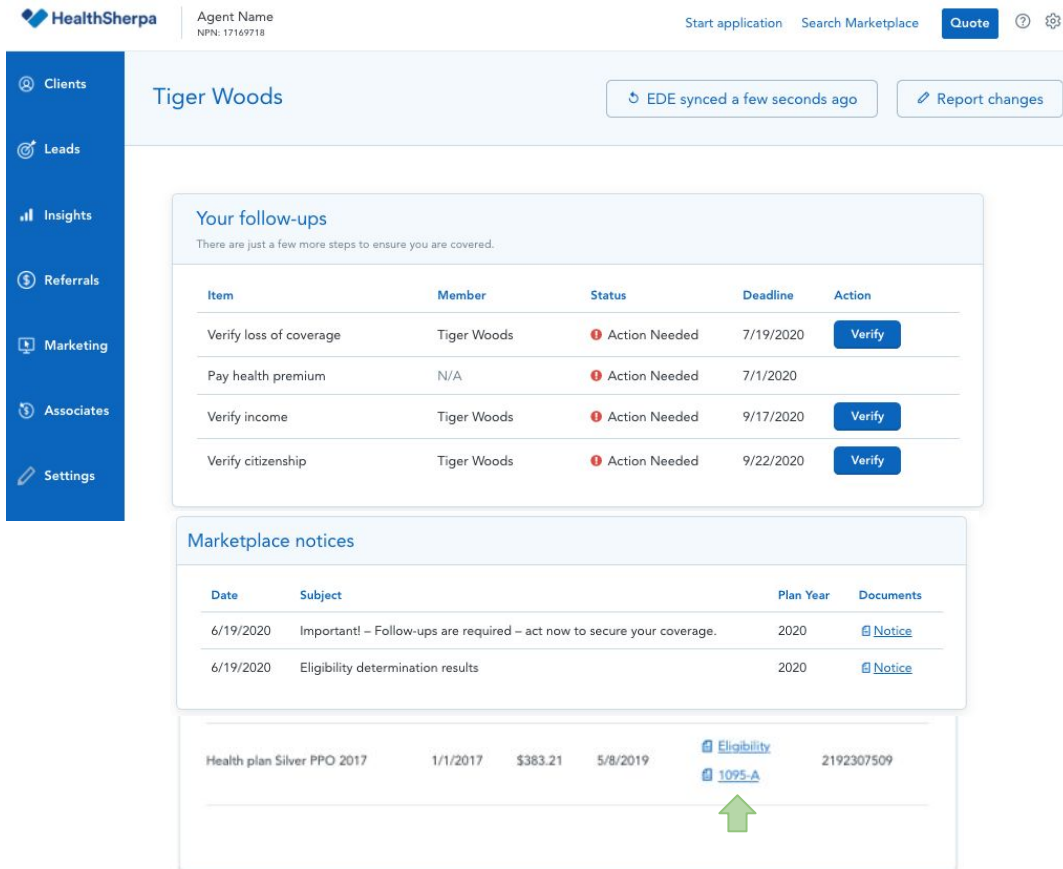
[Renewal email](#)

[Export](#)
[Import](#)
[View import histor](#)

<input type="checkbox"/>	Client	Plan	Gross premium	Net premium	Effective	Created	Documents	Payment	Actions
<input type="checkbox"/>	Dwayne Curtis Email	Ambetter Essential Care 1 (2020)	\$356.39	\$356.39	4/1/20	3/12/20	 Action needed As of 3/12/2020	 Action needed As of 3/12/2020	View
<input type="checkbox"/>	Mickey Mouse Email	AdvanceHealth HMO 6500 73AV	\$422.90	\$181.90	4/1/20	2/14/20	 Action needed As of 2/14/2020	 Action needed As of 2/14/2020	View

Client Details Include:

- Effectuation to-do list
 - Upload required documents
 - Ability to make first binder payment
- Quick action buttons
 - Renew
 - Report a change
 - Term/cancel a policy
- Agent of record visibility
- Eligibility letters and 1095As
- Marketplace notices
- Much more!



The screenshot shows the HealthSherpa interface for a client named Tiger Woods. The top navigation bar includes the HealthSherpa logo, Agent Name (NPN: 17169718), and links for 'Start application', 'Search Marketplace', and a 'Quote' button. A sidebar on the left contains navigation links: Clients, Leads, Insights, Referrals, Marketing, Associates, and Settings. The main content area displays the client's name 'Tiger Woods' and a status 'EDE synced a few seconds ago' with a 'Report changes' link. Below this, there are two main sections: 'Your follow-ups' and 'Marketplace notices'.

Your follow-ups

There are just a few more steps to ensure you are covered.

Item	Member	Status	Deadline	Action
Verify loss of coverage	Tiger Woods	Action Needed	7/19/2020	Verify
Pay health premium	N/A	Action Needed	7/1/2020	
Verify income	Tiger Woods	Action Needed	9/17/2020	Verify
Verify citizenship	Tiger Woods	Action Needed	9/22/2020	Verify

Marketplace notices

Date	Subject	Plan Year	Documents
6/19/2020	Important! – Follow-ups are required – act now to secure your coverage.	2020	Notice
6/19/2020	Eligibility determination results	2020	Notice

Below the marketplace notices, there is a table showing plan details:

Health plan	Effective Date	Monthly Premium	Termination Date	Documents	Plan ID
Health plan Silver PPO 2017	1/1/2017	\$383.21	5/8/2019	Eligibility 1095-A	2192307509


A green arrow points to the '1095-A' link in the table above.








Leads Tab

Displays all leads that have begun quoting, shopping or applying, but have not yet submitted an application.

Additional features

- Filters
- Resume lead
- Dynamic search
- Contact information
- Chosen plan
- Notes


Agent Name
NPN: 17169718
Start application Search Marketplace **Quote** ⓘ ⚙️

 Clients
  **Leads**
 Insights
  Referrals
  Marketing
  Associates
  Settings

Leads

Carrier

Select... ▼

State

Select... ▼

Status

Shopping

Applying

Confirming

Archived

Yes

No

Showing 1 - 10 of 43 [View import history](#) [Import](#) [Export](#)

Lead	Plan	Gross premium	Net premium	Last active	Status	Actions
Peter Rabbit Email (123) 456-7890	-	-	-	2/14/2020	Shopping	Resume ▼

Lead

[View application](#)
[Report changes](#)

Applicant	Gender	Tobacco	Date of birth	SSN	Eligibility
Bill Gates	Male	No	1/1/1980	-	Subsidy and 73% CSR

Contact

Email: email_test@email.com
 Phone: (480) 125-6666
 Address: 123 test street, Phoenix, AZ, 85005

Current quote

Cost Sharing Reduction: 73%
Gross premium: \$360.06
Subsidy: \$241
Net premium: \$119.06

Status

Status: Confirming

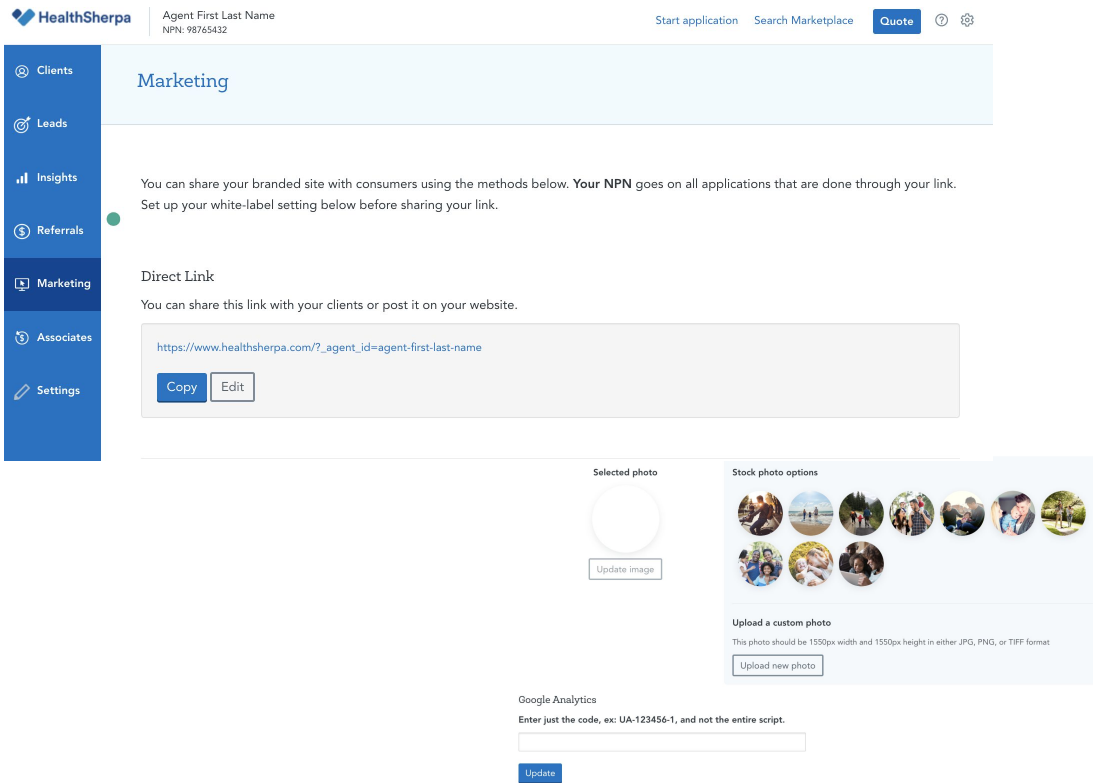
[Resume shopping](#)

Marketing Tab

Contains a unique agent link for consumers to self quote and self enroll retaining the broker's NPN on the application!

Additional features

- Site customization
- Promote on social media pages / personal broker site
- Generates a record in your leads tab
- Retains broker NPN
- Google Analytics functionality



The screenshot displays the HealthSherpa Marketing tab interface. At the top, the HealthSherpa logo is on the left, and the user's name and NPN (98765432) are on the right. Navigation links for 'Start application', 'Search Marketplace', and 'Quote' are also present. A left sidebar contains icons for Clients, Leads, Insights, Referrals, Marketing (selected), Associates, and Settings. The main content area is titled 'Marketing' and includes instructions on sharing the branded site using a unique link. Below this, a 'Direct Link' section shows a URL template: `https://www.healthsherpa.com/?_agent_id=agent-first-last-name`, with 'Copy' and 'Edit' buttons. Further down, there's a 'Selected photo' section with a placeholder and an 'Update image' button, alongside 'Stock photo options' showing a grid of circular images. Below the stock photos is an 'Upload a custom photo' section with a note about image dimensions and an 'Upload new photo' button. At the bottom, a 'Google Analytics' section prompts the user to enter a tracking code and provides an 'Update' button.

HealthSherpa | Agent First Last Name
NPN: 98765432

Start application Search Marketplace Quote ⓘ ⚙️

Marketing

You can share your branded site with consumers using the methods below. **Your NPN** goes on all applications that are done through your link. Set up your white-label setting below before sharing your link.

Direct Link
You can share this link with your clients or post it on your website.

`https://www.healthsherpa.com/?_agent_id=agent-first-last-name`

Copy Edit

Selected photo

Update image

Stock photo options

Upload a custom photo
This photo should be 1550px width and 1550px height in either JPG, PNG, or TIFF format

Upload new photo

Google Analytics
Enter just the code, ex: UA-123456-1, and not the entire script.

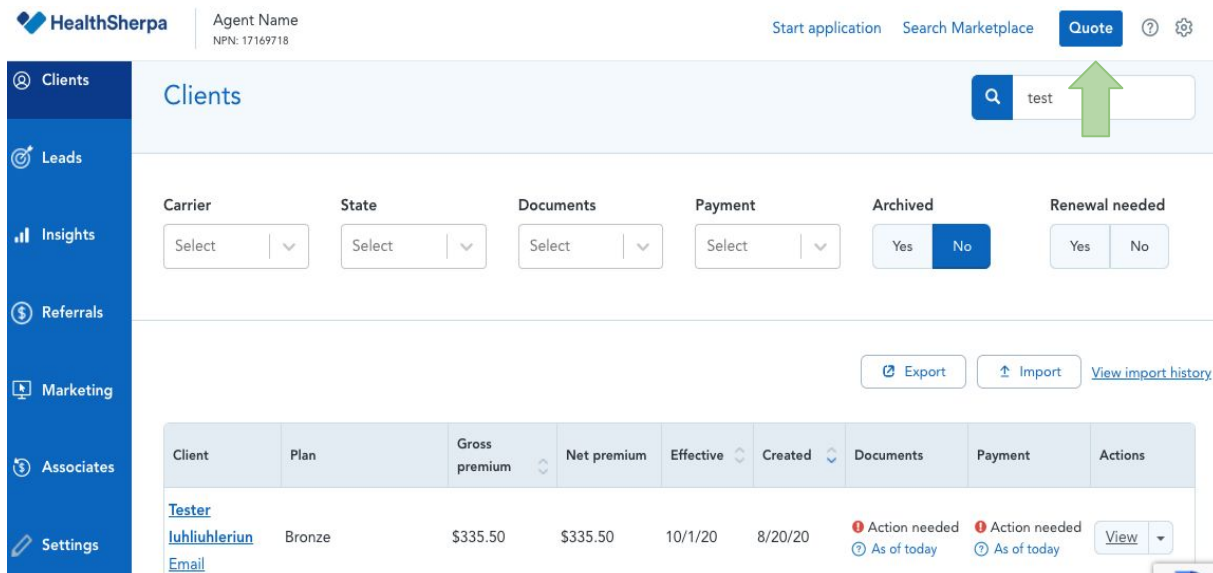
Update



Broker Quoting

Broker Quoting

- Quickly quote and shop for plans in matter of seconds!



HealthSherpa Agent Name
NPN: 17169718

Start application Search Marketplace **Quote** ? ⚙️

Clients

Carrier State Documents Payment Archived Renewal needed

Select Select Select Select Yes No Yes No

Export Import [View import history](#)


Client	Plan	Gross premium	Net premium	Effective	Created	Documents	Payment	Actions
Tester luhliuhlerium Email	Bronze	\$335.50	\$335.50	10/1/20	8/20/20	🔴 Action needed 🕒 As of today	🔴 Action needed 🕒 As of today	View


Broker Quoting

“Household Members” includes ALL members included on tax returns, regardless if they are applying for coverage or not.

Additional features

- Dynamic and streamlined approach
- Basic screening information
- Eligibility determination
- Save lead
- Email quote to client

 **HealthSherpa**

 Agent Name
NPN 12345678

Save lead

Close

Print Share

Your details

Zip code

66103

Household members

2

Who needs coverage?

AgeGender

35M **F**

☐ Tobacco user

☐ Parent of child under 19

☐ Pregnant

☐ Eligible for other coverage

DeleteClose

Household income

\$ 60000

Eligibility

Savings

\$627/mo

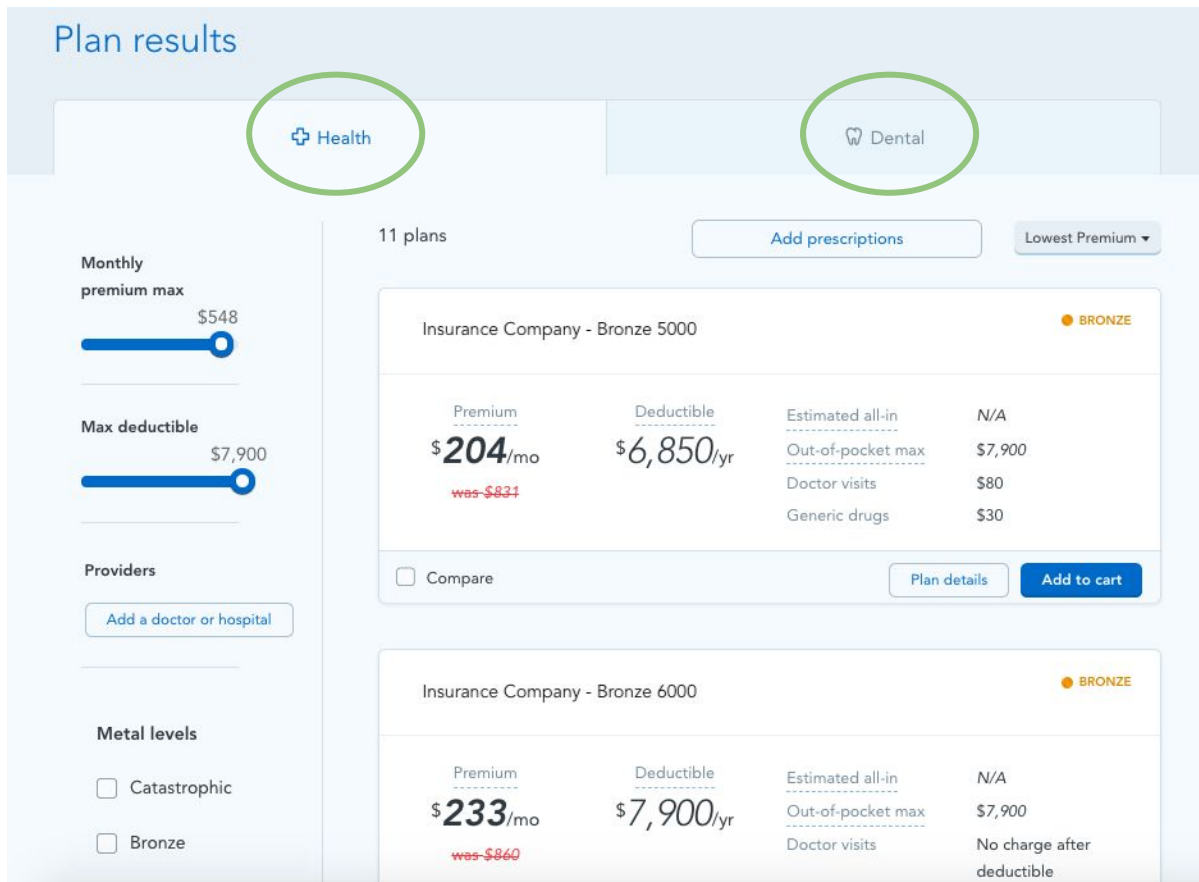
Broker Quoting

Quickly quote and search for Marketplace and on-exchange Dental Plans*.

Additional features

Filters

- Premium
- Deductible
- Prescription
- Provider
- Metal level
- Network



Plan results

Health Dental

11 plans [Add prescriptions](#) [Lowest Premium ▾](#)

Monthly premium max \$548

Max deductible \$7,900

Providers [Add a doctor or hospital](#)

Metal levels

☐ Catastrophic

☐ Bronze

Insurance Company - Bronze 5000 BRONZE

Premium	Deductible	Estimated all-in	N/A
\$204/mo was \$231	\$6,850/yr	Out-of-pocket max	\$7,900
		Doctor visits	\$80
		Generic drugs	\$30

☐ Compare [Plan details](#) [Add to cart](#)

Insurance Company - Bronze 6000 BRONZE

Premium	Deductible	Estimated all-in	N/A
\$233/mo was \$260	\$7,900/yr	Out-of-pocket max	\$7,900
		Doctor visits	No charge after deductible

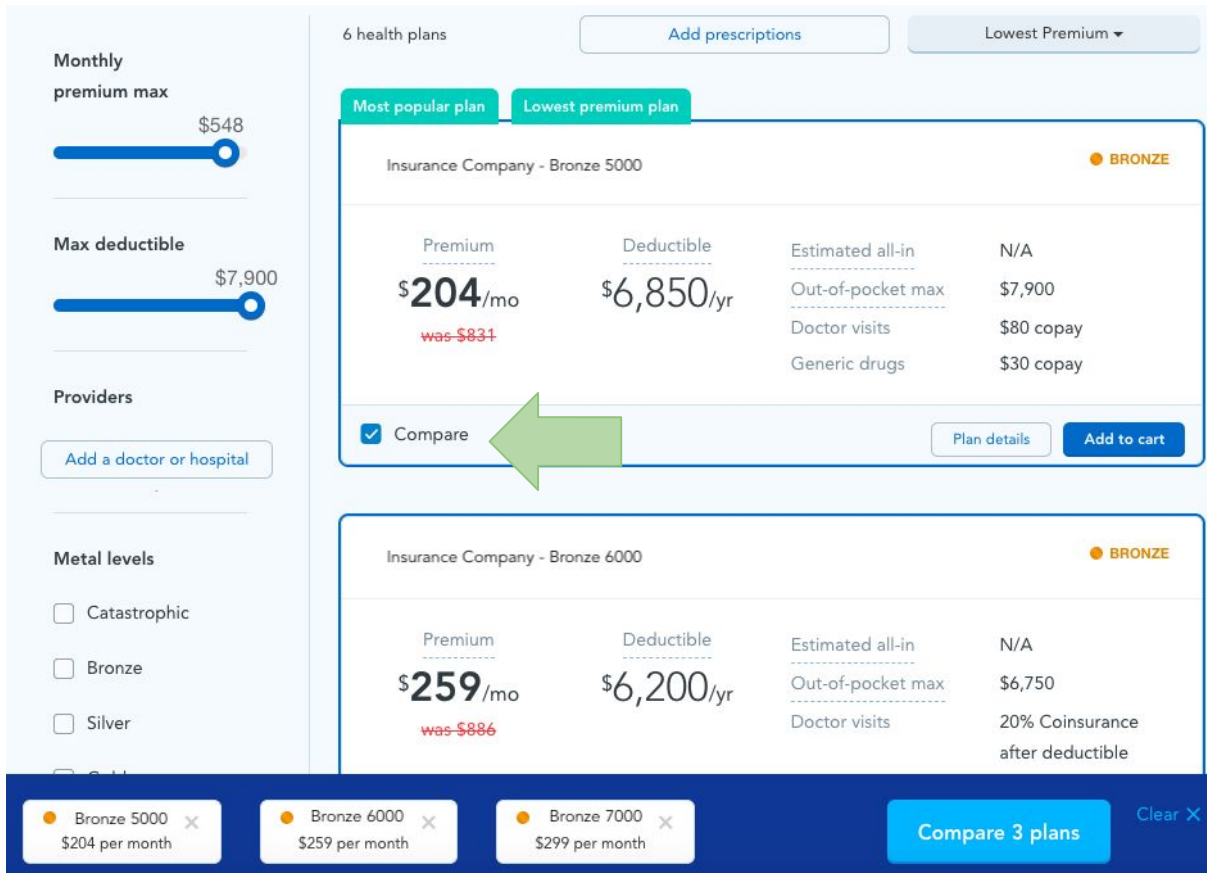
* Stand-alone dental plans require that an applicant also have a Marketplace health plan

Broker Quoting

Compare up to 5 plans side by side.

Additional features

- Plan Comparison
- Email to client



The screenshot displays the HealthSherpa broker quoting interface. On the left, there are filters for 'Monthly premium max' (set to \$548), 'Max deductible' (set to \$7,900), 'Providers' (with an 'Add a doctor or hospital' button), and 'Metal levels' (with checkboxes for Catastrophic, Bronze, Silver, and Gold). The main area shows '6 health plans' with tabs for 'Most popular plan' and 'Lowest premium plan'. Two plan cards are visible, both labeled 'BRONZE'. The first card is for 'Insurance Company - Bronze 5000' with a premium of \$204/mo (was \$831), a deductible of \$6,850/yr, and various out-of-pocket details. The second card is for 'Insurance Company - Bronze 6000' with a premium of \$259/mo (was \$886), a deductible of \$6,200/yr, and similar out-of-pocket details. A green arrow points to the 'Compare' checkbox on the first plan card. At the bottom, a summary bar shows three selected plans: Bronze 5000 (\$204 per month), Bronze 6000 (\$259 per month), and Bronze 7000 (\$299 per month), with a 'Compare 3 plans' button and a 'Clear' link.

Monthly premium max \$548

Max deductible \$7,900

Providers
Add a doctor or hospital

Metal levels
☐ Catastrophic
☐ Bronze
☐ Silver
☐ Gold

6 health plans
Add prescriptions
Lowest Premium ▾

Most popular plan
Lowest premium plan

Insurance Company - Bronze 5000 **BRONZE**

Premium	Deductible	Estimated all-in	
\$204/mo was \$831	\$6,850/yr	Out-of-pocket max	N/A
		Doctor visits	\$7,900
		Generic drugs	\$80 copay
			\$30 copay

☒ Compare **Plan details** **Add to cart**

Insurance Company - Bronze 6000 **BRONZE**

Premium	Deductible	Estimated all-in	
\$259/mo was \$886	\$6,200/yr	Out-of-pocket max	N/A
		Doctor visits	\$6,750
			20% Coinsurance after deductible


BRONZE 5000 × \$204 per month
BRONZE 6000 × \$259 per month
BRONZE 7000 × \$299 per month
Compare 3 plans Clear ×

Broker Quoting

Compare plans side by side

Additional features

- Compare plans
- Email to client

 **HealthSherpa**

Agent Name
NPN 12345678

Save lead

< Back to all plans

Share

	Bronze 5000	Bronze 6000	Bronze 7000
	Add to cart	Add to cart	Add to cart

Summary

Monthly Premium	\$204 for household was \$224	\$259 for household was \$284	\$299 for household was \$324
Deductible	\$6,850 per person	\$6,200 per person	\$3,100 per person
Max OOP	\$7,900 per person	\$6,750 per person	\$6,750 per person
Estimated All-in			
Network	EPO	EPO	EPO

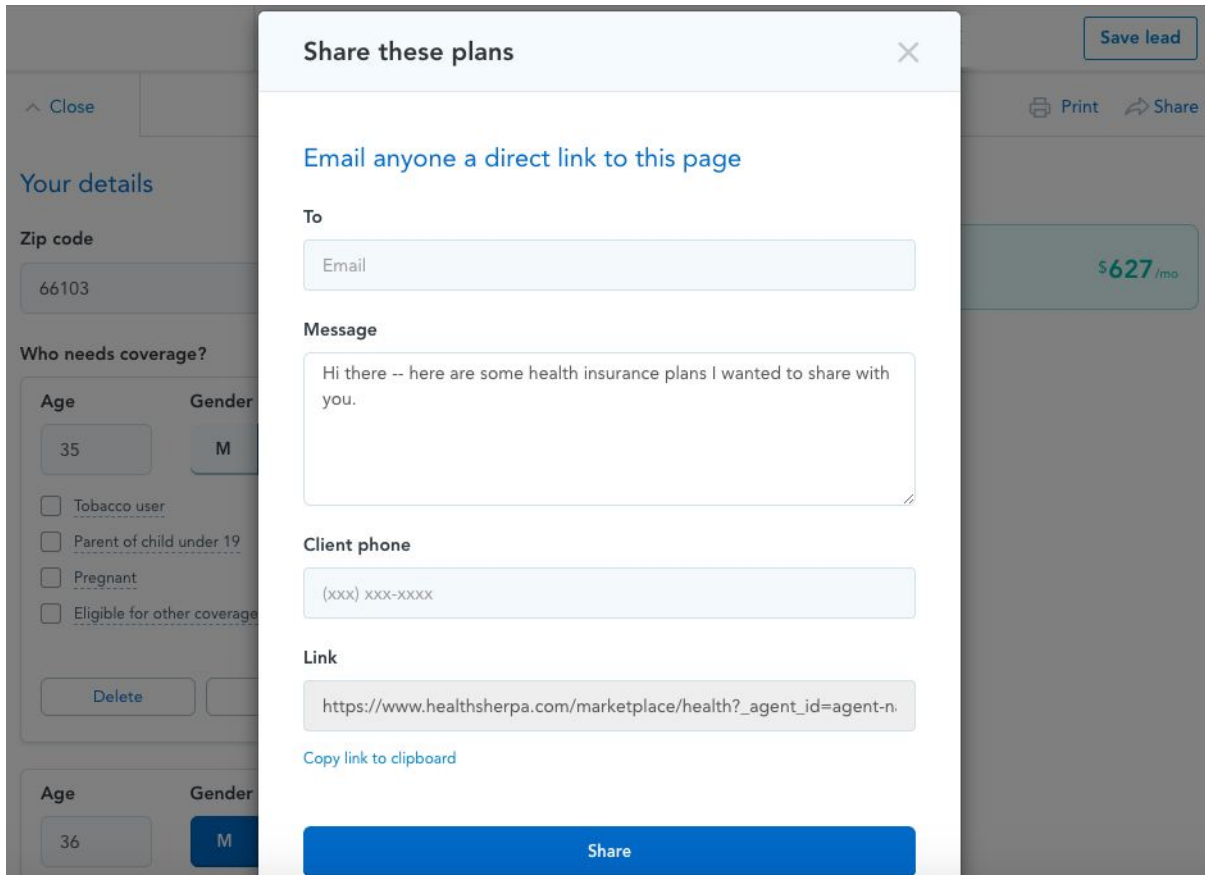
Broker Quoting

→ Send to client

Begin quote and email to client.

Additional features

- Add custom message
- Includes resume link



The screenshot shows a 'Share these plans' modal window overlaid on a background form. The modal has a title bar with a close button (X). Below the title, there is a heading 'Email anyone a direct link to this page'. The form inside the modal includes a 'To' field with a placeholder 'Email', a 'Message' field with a pre-filled text 'Hi there -- here are some health insurance plans I wanted to share with you.', a 'Client phone' field with a placeholder '(xxx) xxx-xxxx', and a 'Link' field with a pre-filled URL 'https://www.healthsherpa.com/marketplace/health?_agent_id=agent-n.'. Below the link field is a 'Copy link to clipboard' link. At the bottom of the modal is a large blue 'Share' button. The background form is partially visible, showing fields for 'Zip code' (66103), 'Who needs coverage?' (Tobacco user, Parent of child under 19, Pregnant, Eligible for other coverage), and 'Age' (35, 36) and 'Gender' (M) fields. There is also a 'Delete' button and a 'Save lead' button in the top right corner of the background form.

Share these plans

Email anyone a direct link to this page

To

Email

Message

Hi there -- here are some health insurance plans I wanted to share with you.

Client phone

(xxx) xxx-xxxx

Link

[https://www.healthsherpa.com/marketplace/health?_agent_id=agent-n.](https://www.healthsherpa.com/marketplace/health?_agent_id=agent-n)

[Copy link to clipboard](#)

Share

Broker Quoting

→ Add to Cart

Select the health plan your client would like to enroll in and click “Add to cart”.

Plan results

Health

Dental

Monthly premium max

\$548

Max deductible

\$7,900

Providers

Add a doctor or hospital

Metal levels

☐ Catastrophic

☐ Bronze

11 plans

Add prescriptions

Lowest Premium ▾

Insurance Company - Bronze 5000

BRONZE

Premium	Deductible	Estimated all-in	N/A
\$204/mo	\$6,850/yr	Out-of-pocket max	\$7,900
was \$831		Doctor visits	\$80
		Generic drugs	\$30

☐ Compare

Plan details

Add to cart

Insurance Company - Bronze 6000

BRONZE

Premium	Deductible	Estimated all-in	N/A
\$233/mo	\$7,900/yr	Out-of-pocket max	\$7,900
was \$860		Doctor visits	No charge after deductible

Broker Quoting

→ Add to Cart

From here you can jump into the health application by clicking “Start Application”.

You can also help your client find a Stand-Alone Dental plan by clicking “Shop Dental” or “continue shopping”.

Plan results

Monthly premium max

\$548

Max deductible

\$7,900

Providers

Add a doctor or hospital

Metal levels

☐ Catastrophic

☐ Bronze

Cart

X Bronze 5000 ~~\$623 /mo~~ \$309 /mo

Total premium **\$309 /mo**

Add a dental plan

Most plans include free cleanings and X-rays

Shop dental

Continue shopping

Start application



Application Flow

Experience how quick and easy it is to submit an application on HealthSherpa

Privacy and use of information

With Enhanced Direct Enrollment the application is completed on HealthSherpa.

Additional Information

- Renewals are prefilled

*Note: Application steps vary by household

Privacy and the use of your information

Social Security, the Department of Homeland Security (DHS), and/or a consumer reporting agency. They need this information to check your eligibility for coverage and help paying for coverage if you want it and to give you the best service possible. The Marketplace may also check your information at a later time to make sure your information is up to date. The Marketplace will notify you if they find something has changed.

[Learn more about your data](#), or view the [Privacy Act Statement](#).

By continuing, you (the consumer) grant HealthSherpa permission to access your Marketplace application.

To continue, you must agree and check each of the following statements:

☐ I agree to have my information used and retrieved from data sources for this application. I have consent for all people I'll list on the application for their information to be retrieved and used from data sources.

☐ I understand that I'm required to provide true answers and that I may be asked to provide additional information, including proof of my eligibility for a Special Enrollment Period if I qualify. If I don't, I may face penalties, including the risk of losing my eligibility for coverage.

[Back](#)

[Continue](#)

Primary contact information

Additional Information

- Entire application is dynamic and streamlined.

Primary contact

Your information

Home address

Contact details

Household

Members

Additional questions

Finalize

Primary contact

Continue >

Your information

First name

Middle (Optional)

Last name

Suffix (Optional)

Client

Smith

Select | v

Date of birth

Sex

01/01/1980

Male

Female

What is your Social Security Number (SSN)? (Optional)

This helps us verify your identity. If you're applying for coverage and have an SSN, enter it here now, or you may not be able to proceed. If you don't have an SSN, leave this field blank.

XXX-XX-XXXX

Back


Continue

*Note: Application steps vary by household

Household Information

Additional Information

- Know exactly where you're at in the application process with completed indicator.

Primary contact 

Household

Who's applying?

Residence

Members

Additional questions

Finalize

Household

Who's applying for coverage?

Is Client Smith applying for coverage?


☐ Yes

☐ No

Do you want to see if you are eligible for cost savings?

☐ Yes

☐ No

Who else is applying for coverage? 

+ Add spouse

+ Add another person

Back

Continue

*Note: Application steps vary by household

Income

Additional Information

- Quick and easy to add income sources.

Primary contact ✓

Household ✓

Additional information ✓

Members ✓

Income

Client Smith

Additional questions

Finalize

Income information

Continue >

To determine if you're eligible for savings, we need to ask about your income. Click to view a list of acceptable types. [View list](#) ▾

Current income for Client Smith

Does Client currently get any income?

☒ Yes ☐ No

Tell us about any income Client will have this month. ⓘ

Type	How much	
Job / HealthSherpa (8185566611)	\$25,000.00 per year	<div>Remove all</div> <div>Edit Remove</div>

Add new income source

*Note: Application steps vary by household



Additional Questions -ICHRA

We now support ICHRA Enrollments!

- Anyone who is offered an ICHRA through an employer you may now enroll them through HealthSherpa.

Primary contact ✓

Household ✓

Additional information ✓

Members ✓

Income ✓

Additional questions ✓

Extra help ✓

Coverage

Employer coverage

Additional questions

Finalize

Need help?

Our team of experts can help you finalize your enrollment.

[\(855\) 772-2663](tel:(855)772-2663)

6:00am-4:00pm PST • Mon-Fri
Closed • Sat
Closed • Sun

Additional questions

Existing coverage information

Is test test currently enrolled in health coverage?
Select "No" if you're currently enrolled but know your coverage will end on or before 10/9/2020. ⓘ

☐ Yes

☒ No

Before you start this section, gather HRA information.

You'll need any information about Health Reimbursement Arrangements (HRAs) that the people on this application may have gotten from an employer.

Do any of these people have an individual coverage HRA through their job, or through the job of another person like a spouse or parent? ⓘ

[Learn more](#)

☐ test test

Have any of these people been offered an individual coverage HRA they haven't yet accepted through their job, or through the job of another person, like a spouse or parent? ⓘ

Only select a person's name if the person will be able to use their individual coverage HRA on 10/9/2020.

☐ test test

Back

Continue

*Note: Application steps vary by household

Additional Questions - Special Enrollment

Additional Information

- Qualifying Life Events.

Primary contact ✓

Household ✓

Additional information ✓

Members ✓

Income ✓

Additional questions

Extra help ✓

Coverage ✓

Employer coverage ✓

Additional questions

Finalize

Additional questions

Upcoming changes

Will anyone lose qualifying health coverage before 12/7/2020?

You may need to submit documents to confirm that you recently lost coverage before your new coverage can start.

☐ Client Smith

Recent changes

Select any of the life changes that apply to any of the applicants. This must have taken place within the last 60 days (since 8/9/2020)

You may attest to a loss of qualifying health coverage as late as **January 1, 2020** if you previously qualified for a loss of coverage but missed your enrollment deadline due to COVID-19.

☐ Lost qualifying health coverage

☐ Got married

☐ Changed primary place of living

☐ Released from incarceration (detention or jail)

Finalize the Application

Additional Information

- Ability to edit the application by section rather than going through all the questions again!

Primary contact ✓

Household ✓

Additional information ✓

Members ✓

Income ✓

Additional questions ✓

Finalize

Review

Agreements

Tax attestation

Sign and submit

Finalize

Print

Take a few minutes to review the information you gave us and make any changes, if necessary.

Primary contact

Edit

Full name: Client Smith

Address: 1111 Client Street , Phoenix, AZ 85005

Phone number: (818) 225-5889

Email: client10999@email.com

Get updates by email: No

Preferred written language: English

Preferred spoken language: English

Household members

Edit

Name	DOB	SSN	Relationship	Sex	Applying
Client Smith	1980-01-01		Self	Male	Yes

Household income

Edit

*Note: Application steps vary by household

Agreements and Tax attestation

Additional Information

- Quickly complete agreements and electronically sign an application.

Primary contact ✓

Household ✓

Additional information ✓

Members ✓

Income ✓

Additional questions ✓

Finalize

Review ✓

Agreements

Tax attestation

Sign and submit

Finalize

Agreements

Please read the attestations below and select a response for each statement.

Renewal of coverage

To make it easier to determine my eligibility for help paying for coverage in future years, I agree to allow the Marketplace to use my income data, including information from tax returns, for the next 5 years. The Marketplace will send me a notice, let me make any changes, and I can opt out at any time. ⓘ

☐ I agree

☐ I disagree

Tax filer attestation

Did Client reconcile premium tax credits on their tax return for any past years?
(Optional)
[Learn more about reconciling premium tax credits.](#)

Check the box below if all these apply to you:

- You got premium tax credits to help pay for Marketplace coverage.
- The tax filer(s) on your application filed a federal income tax return for the same year you used tax credits. For example, in 2018, you got help paying for coverage, then and you also filed a tax return for the same year.

*Note: Application steps vary by household

Eligibility Results

Additional Information

- Real time statuses and information from HC.gov.

Review eligibility results

Before completing your enrollment, please do a final review of your eligibility results.

Applicants

Name	Eligibility
✓ Client Smith	<p>Eligible to enroll in a Marketplace plan, due to a Special Enrollment Period (loss of coverage)</p> <p>Eligible for a tax credit</p> <p>Eligible for lower deductibles, out of pocket limits and copays on Silver plans</p> <p>Followups required:</p> <p>Verify income by 1/6/2021</p> <p>Verify citizenship by 1/11/2021</p> <p>Verify loss of coverage</p>

Your household qualifies for a **total monthly tax credit of \$265.**

For more details on your eligibility, download the official letter here. **You must download this document to finish your enrollment.**

✓ Your download has begun, you may continue.

Confirmation Page

Additional Information

- Review effectuation documents and return to the clients details page to effectuate the policy.

You've chosen a plan.

You can start using your health coverage after you submit documents and the Marketplace confirms you're eligible to enroll through a Special Enrollment Period. The sooner you submit documents, the sooner your coverage can become active. See below for more information about next steps.

What should I do now?

1 You must submit documents to the Marketplace for:

- Client Smith
Verify loss of coverage by 11/7/2020

Log into your dashboard to submit these documents.

2 Watch for a notice with the results of the Marketplace's review of your documents. You may access your Marketplace notices by logging into your dashboard.

3 Pay your premium after your eligibility is confirmed. You'll receive another notice when it's time to take this step. You may pay your premium **\$157.90** by 10/31/2020

Note: Remember that you can't start using your coverage until the Marketplace reviews your documents and confirms your information, and you pay your premium.

Log into your dashboard to complete these last few steps:

[Go to my dashboard](#)



AdvanceHealth HMO 6500 73AV -
MaricopaFocus Network

\$157.90/mo

*Note: Application steps vary by household



Post Enrollment Tools


Quickly effectuate plans all within your HealthSherpa Platform

Document Management and Binder Payment

- Identify required documents
- Upload documents
- Ability to make first binder payment
- Alerts and updates

Your follow-ups
There are just a few more steps to ensure you are covered.

Item	Member	Status	Deadline	Action
Verify loss of coverage	Client Smith	❗ Action Needed	11/7/2020	Verify
Pay health premium	N/A	❗ Action Needed	11/1/2020	Pay now
Verify income	Client Smith	❗ Action Needed	1/6/2021	Verify
Verify citizenship	Client Smith	❗ Action Needed	1/11/2021	Verify



Submit followup documents
Once you submit your documents, the Marketplace will review and verify them. Make sure to check back periodically for updates.

1. Verify Loss of coverage for Christopher Client by 3/12/2019.

Select document type ▼

Select file

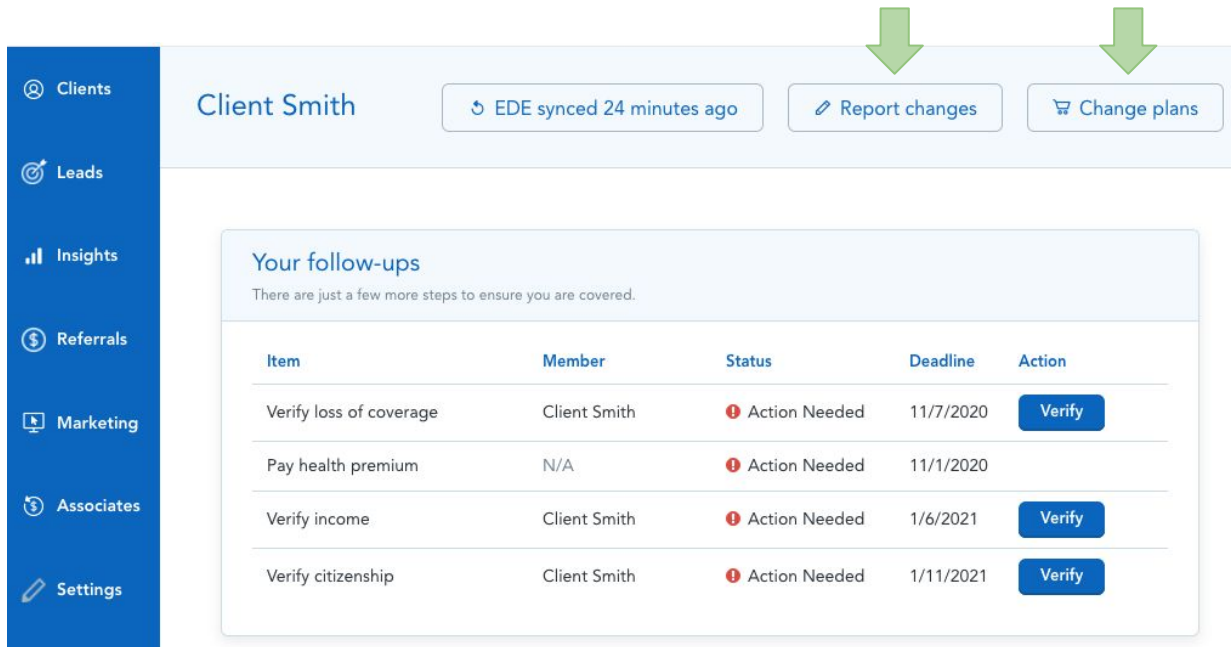
[Upload](#)

Document	Type	Submitted	Status
EligibilityResultsNotice_(11).pdf	Letter from an employer	2/14/2019	Action Needed

Acceptable document types are images (jpg, gif, png, etc.) and PDFs.

Reporting a Change

- Easily update applications and report changes within the clients detail page.



Client Smith

↻ EDE synced 24 minutes ago

✎ Report changes

🛒 Change plans

Your follow-ups

There are just a few more steps to ensure you are covered.

Item	Member	Status	Deadline	Action
Verify loss of coverage	Client Smith	❗ Action Needed	11/7/2020	Verify
Pay health premium	N/A	❗ Action Needed	11/1/2020	
Verify income	Client Smith	❗ Action Needed	1/6/2021	Verify
Verify citizenship	Client Smith	❗ Action Needed	1/11/2021	Verify

Marketplace Documents

- Easily view and print client documents
 - 1095-A Tax Form
 - Eligibility Letters
 - Marketplace Notices

Application history					
Plan	Effective	Subsidy	Documents	FFM ID	Submitted
Insurance Company - Bronze 5000	1/1/2019	\$2,049.00	Eligibility		11/9/2018
Insurance Company - Bronze 4000	1/1/2018	\$1,784.00	Eligibility IRS 1095 A Initial Form		11/9/2017



Cancel / Terminate Plan

- You can now easily cancel a plan within your HealthSherpa platform.

Coverage 2020

Health plan

[AdvanceHealth HMO 6500 73AV - MaricopaFocus Network - HMO](#)

[Blue Cross Blue Shield of Arizona, Inc.](#)

SILVER + CSR

\$4,000

Deductible

\$6,500

Out of pocket max

\$157.90

Premium

Was \$422.90

[View plan details](#)

Status

Members

Subscriber ID

FFM ID

Effective:

Documents

Carrier phone:

Payment phone:

Agent of record:

Pending followups

Client Smith

0000332429

13391898

11/1/2020

[Summary of benefits](#)

(555) 555-5555

(602) 864-4115

NPN 17169718

Change plan

Cancel plan

Cancel or terminate

By cancelling or terminating this policy, any other active health or dental policies you may have will be terminated as well.

Effective date:

Back

Cancel or terminate your policy



Client Self Enrollment Flow

Understand your client's shopping experience

Client Self Enrollment

- Quote using zip code and email.

Additional detail

Email is optional, when used, it creates a generates a lead in your leads tab.

Easily find an affordable
health plan

Enter your info to compare plans



See plans and prices




Client Self Enrollment

- Spouse
- Dependents

YOUR INFO

SAVINGS

PERSONALIZE



Who needs health coverage?

You can apply for yourself or anyone who lives with you.

You

Age

Gender Identity

Male

Female

Add my spouse

Add a dependent

Back

Continue

Client Self Enrollment

- Household Income


Additional detail

Income calculator tool available to help clients calculate their annual income.

YOUR INFO

SAVINGS

PERSONALIZE



Your household information

This will determine if you qualify for savings.

How many people are in your tax household?


2

-

+

Estimate your 2019 household income (before taxes)

\$

 Include the estimated income of **anyone** you file taxes with or claim on your taxes. Need help estimating? Use our [income calculator](#).

Back

Continue

Client Self Enrollment

Income Calculator


Calculate income


- Annual
- Monthly
- Weekly
- Per Project

YOUR INFO

SAVINGS

PERSONALIZE





2019 Income Calculator

Add household income (pre-tax)


\$

Per year

Add

 \$40,000

per year



Total 2019 pre-tax household income

\$40,000

Use this amount →

FAQ

What income should I include?

Include income from anyone you claim on your taxes and who will earn income in 2018.

Include income from these sources:

- Federal taxable wages (from your job)
- Tips
- Self-employment income
- Unemployment income
- Social security
- Social security disability income (SSDI)
- Retirement or pension income
- Alimony
- Investment income
- Excluded (untaxed) foreign income


Whose income should be included?

What if I'm married, but we file taxes separately?

Client Self Enrollment

- Client will be able to see how much they can save on their monthly premium and whether or not they qualify for a Cost Sharing Reduction.

YOUR INFO — SAVINGS — PERSONALIZE




You qualify for 2 kinds of savings!

You'll **save** this much on your premium:

\$846/month

✔ This means you'll see plans as low as **\$0 per month**

This is an initial estimate. You'll see your exact savings when you apply.

 CSR

You also qualify for a **Cost Sharing Reduction!**

This means **Silver plans** will be an especially good value.

Client Self Enrollment







- SEP Verification (if applicable).

YOUR INFO — SAVINGS — PERSONALIZE

It's currently Special Enrollment


During Special Enrollment, you need a Qualifying Life Event to enroll

Select your Qualifying Life Event

- ☐ Lost or losing health coverage 
- ☐ Change in household size 
- ☐ Change in primary place of living 
- ☐ Change in eligibility 
- ☐ Enrollment / plan error 
- ☐ Other situations 
- ☒ None of the above

Personalized Quoting

YOUR INFO — SAVINGS — **PERSONALIZE**




Do you have any preferred doctors or hospitals?

You'll be able to see which plans they accept.

Back

Skip this step →

YOUR INFO — SAVINGS — **PERSONALIZE**



Do you take any prescription drugs?

You'll be able to see which plans cover your drugs, and how much they'll charge you.

Back

Skip this step →


Client Self Enrollment


Plan Selection

Additional filters

- Premiums
- Deductibles
- Providers
- Prescription
- Network types
- Metal tiers


Plan results

 Health

 Dental

60 plans Lowest Premium ▾

Savings **\$228** /mo


Cost sharing reduction 

Monthly premium max **\$476**

Max deductible **\$8,150**

Providers

[Add a doctor or hospital](#)

Usage estimate 

☐ Low
☒ Medium
☐ High

Lowest premium plan

Insurance Company - Bronze 5000 BRONZE

Premium	Deductible	Your estimated all-in	\$1,769
\$25/mo	\$8,150/yr	Out-of-pocket max	\$8,150
<small>was \$253</small>		Doctor visits	No charge after deductible
		Generic drugs	No charge after deductible

☐ Compare
 [Plan details](#)
[Add to cart](#)

Insurance Company - Bronze 5000 BRONZE

Premium	Deductible	Your estimated all-in	\$1,903
\$34/mo	\$6,800/yr	Out-of-pocket max	\$8,000
<small>was \$262</small>		Doctor visits	\$40 after deductible
		Generic drugs	\$20

Client Self Enrollment

- Plan details page

Additional Information

A client can click into a specific plan to see additional information regarding the plan.

[Plan costs](#)

[Doctor visits](#)

[Prescriptions](#)

[Labs](#)

[Hospital](#)

[Other coverage](#)

[Preventative care](#)


[Estimated all-in cost](#)

[← Go back](#)

[Add to cart](#)

Insurance Company

Bronze 5000

 **Plan costs**
Click the down arrow to learn more about each of these.

Monthly premium	\$25 per month	▼
Deductible	\$8,150 per person	▼
Out-of-pocket max	\$8,150 per person	▼
Network type	HMO	▼
Metal tier	Bronze	▼
Official documents	📄 Summary of benefits (PDF) 📄 Drug formulary 📄 Provider list 📄 Plan brochure	

● BRONZE



Client Self Enrollment

- Save Progress

Additional Information

When a client saves progress, they can pick up where they left off later.

This also creates a lead in the broker dashboard.

Plan costs

Doctor visits

Prescriptions

Labs

Hospital

Other coverage

Preventative care

[← Go back](#)

[Enroll in this plan](#)

Insurance

Bronch

Monthly p

Deductible

Out-of-poc

Network

Save your progress

We'll send you a link so you can pick up where you left off.

Email

Mobile phone number (optional)

[Save progress](#)

By entering a mobile phone number, you agree the number entered is yours. You also agree to receive recurring text messages regarding deadlines for enrollment as well as general enrollment information through an automatic text messaging system. Agreeing to these terms is not a condition of purchase. Msg & data rates may apply. You can opt-out at any time.

EDE Application experience is the same for brokers and consumers.

Note: If client is self enrolling using your enrollment site, there is an ID proofing step for the client.




Settings

Ensure your account is setup correctly and completely

Settings Tab

All the information within the settings tab is captured when the account is created.

To update or make corrections please make sure to hit 'update' in order to save any changes made.



HealthSherpa

Agent Name
NPN: 17169718

Get started

Start application

Search Marketplace

Quote

?

⚙️

Clients

Leads

Insights

Referrals

Marketing

Associates

Settings

Account settings

Login

To change your password, please enter your current password.

EMAIL ADDRESS

hstest@healthsherpa.com

CURRENT PASSWORD

NEW PASSWORD

CONFIRM NEW PASSWORD

Update

FFM Account

These will be transmitted on the eligibility and insurer applications.

FIRST NAME

Agent

LAST NAME

Name

NPN

17169718

FFM USERNAME

WritingAgentUsername

Your FFM Username is the same login you use when logging into [portal.cms.gov](#).

Update



HealthSherpa Resources



Resources

Getting Started

Great resource for any new agent. Provides short videos and recap of this entire training to ensure you're all setup and ready to write your first application!

Help Center

Find answers to all your questions by typing in a keyword, you'll find amazing articles with step by step instructions on what it is you're looking for!

HealthSherpa Agent Name NPN: 17169718

Start application Search Marketplace Quote

Clients

Carrier State Documents Payment Archived

61 clients Renewal email Export Import View import history

	Client	Plan	Gross premium	Net premium	Effective	Created	Documents	Payment	Actions
<input type="checkbox"/>	Client Smith Email	AdvanceHealth HMO 6500 73AV -...	\$422.90	\$157.90	11/1/2020	10/8/2020	Action needed As of today	Action needed As of today	View



HealthSherpa Broker Support

Agent Support Representatives strive to provide top-tier support to HealthSherpa agents, agencies, and health insurance carriers. In the event of feature questions or technical issues, HealthSherpa's broker support is available.

****HealthSherpa now offers Agency Account Managers for our larger agencies.**

Hours of Operation:

January* - October
(Special Enrollment Period)

Mon - Fri
5AM - 5PM PST

November - December*
(Open Enrollment Period)

Mon - Fri
6AM - 5PM PST



PHONE

(888) 684-1373



EMAIL

agent_support@healthsherpa.com



CHAT

Chat from dashboard



Thank you!