



HealthSherpa Carrier Agent Platform Training

Prepared for HealthSherpa's Carrier Agents

Agenda

1. [What is EDE?](#)
2. [Agent Dashboard](#)
3. [Quoting](#)
4. [Application](#)
5. [Post Enrollment Tools](#)
6. [Consumer Self Enrollment](#)
7. [Resources](#)

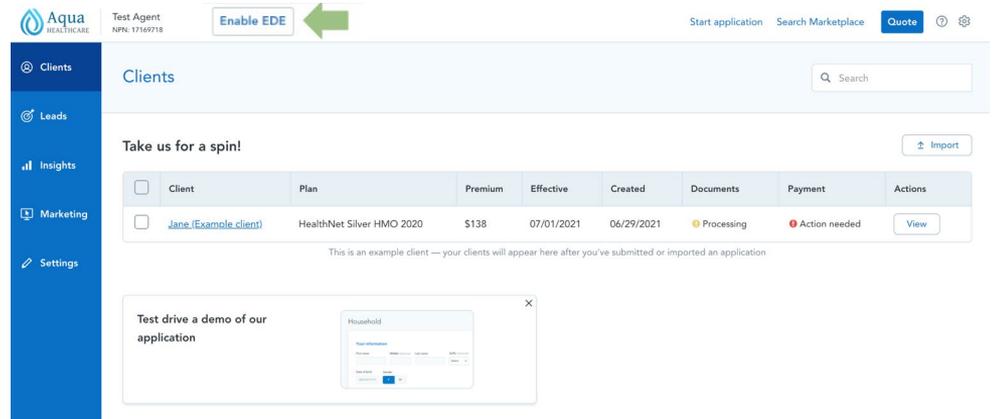


EDE-enable Everyone!

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.



The screenshot shows the HealthSherpa web application interface. At the top, there is a navigation bar with the Aqua Healthcare logo, a 'Test Agent' section with NPN: 17169718, and an 'Enable EDE' button with a green arrow pointing to it. To the right are links for 'Start application', 'Search Marketplace', and a 'Quote' button. A search bar is located in the top right corner.

The main content area is titled 'Clients' and features a sidebar with navigation options: Clients, Leads, Insights, Marketing, and Settings. Below the title, there is a section 'Take us for a spin!' with an 'Import' button. A table lists client information:

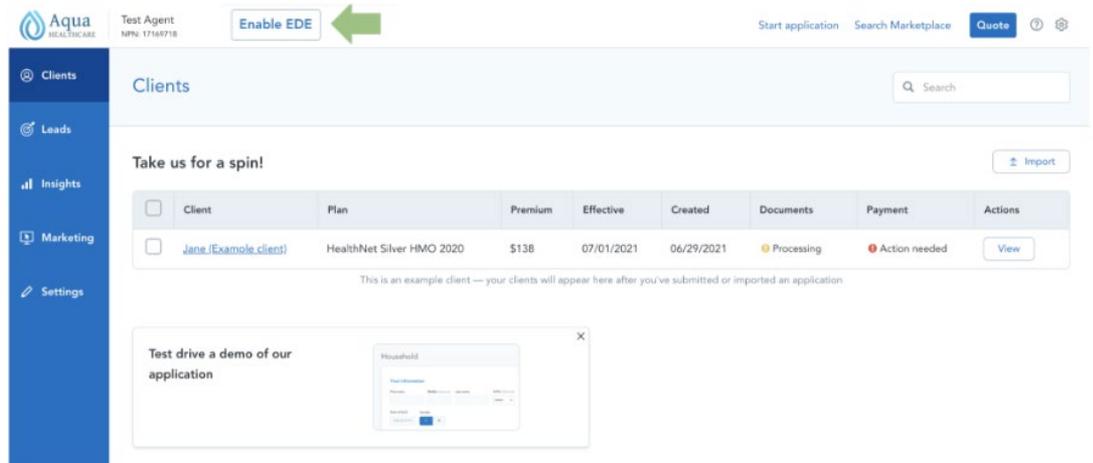
Client	Plan	Premium	Effective	Created	Documents	Payment	Actions	
<input type="checkbox"/>	Jane (Example client)	HealthNet Silver HMO 2020	\$138	07/01/2021	06/29/2021	Processing	Action needed	View

Below the table, a note states: 'This is an example client — your clients will appear here after you've submitted or imported an application.'

At the bottom, there is a promotional box titled 'Test drive a demo of our application' with a 'Household' form preview.

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



Aqua HEALTHCARE

Test Agent
MPN: 1718718

Enable EDE

Start application Search Marketplace Quote

Clients

Take us for a spin! Import

Client	Plan	Premium	Effective	Created	Documents	Payment	Actions
<input type="checkbox"/> Jane (Example client)	HealthNet Silver HMO 2020	\$138	07/01/2021	06/29/2021	Processing	Action needed	View

This is an example client — your clients will appear here after you've submitted or imported an application.

Test drive a demo of our application

Household

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'.

HealthSherpa | Agent Name: NPN: 17169718

Start application Search Marketplace Quote ? ⚙️

Clients

Search

Carrier: Select | State: Select | Documents: Select | Payment: Select | Archived: Yes No | Renewal needed: 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.



Search for an application

Add any existing Marketplace application to your dashboard

First name

Last name

Date of birth

Coverage state 

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

[Or search by SSN](#)

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

Search results

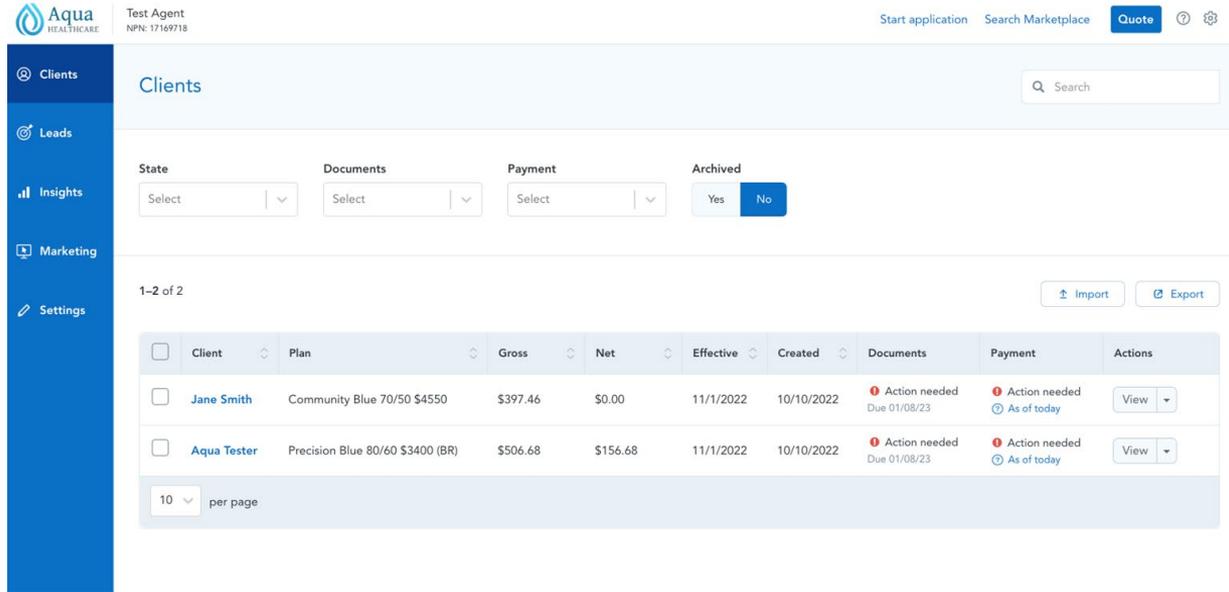
By selecting a result, you attest that you are speaking to and have permission from the consumer to access their information.

Applicant	Address	Application
mickey mouse DOB: 1980-01-01	1234 TEST STREE PHOENIX, AZ 85001	2020 ID: 12901170 <input type="button" value="Add to clients"/>

Not the results you were expecting? [Create a new application.](#)

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.



The screenshot shows the HealthSherpa interface for the 'Clients' tab. At the top, there is a header with the 'Aqua HEALTHCARE' logo, 'Test Agent NPN: 17169718', and navigation links for 'Start application', 'Search Marketplace', and a 'Quote' button. A search bar is located in the top right corner.

On the left, a blue sidebar contains navigation options: 'Clients' (selected), 'Leads', 'Insights', 'Marketing', and 'Settings'.

The main content area is titled 'Clients' and features several filter dropdowns: 'State', 'Documents', 'Payment', and 'Archived' (with 'Yes' and 'No' buttons). Below the filters, it indicates '1-2 of 2' results and provides 'Import' and 'Export' buttons.

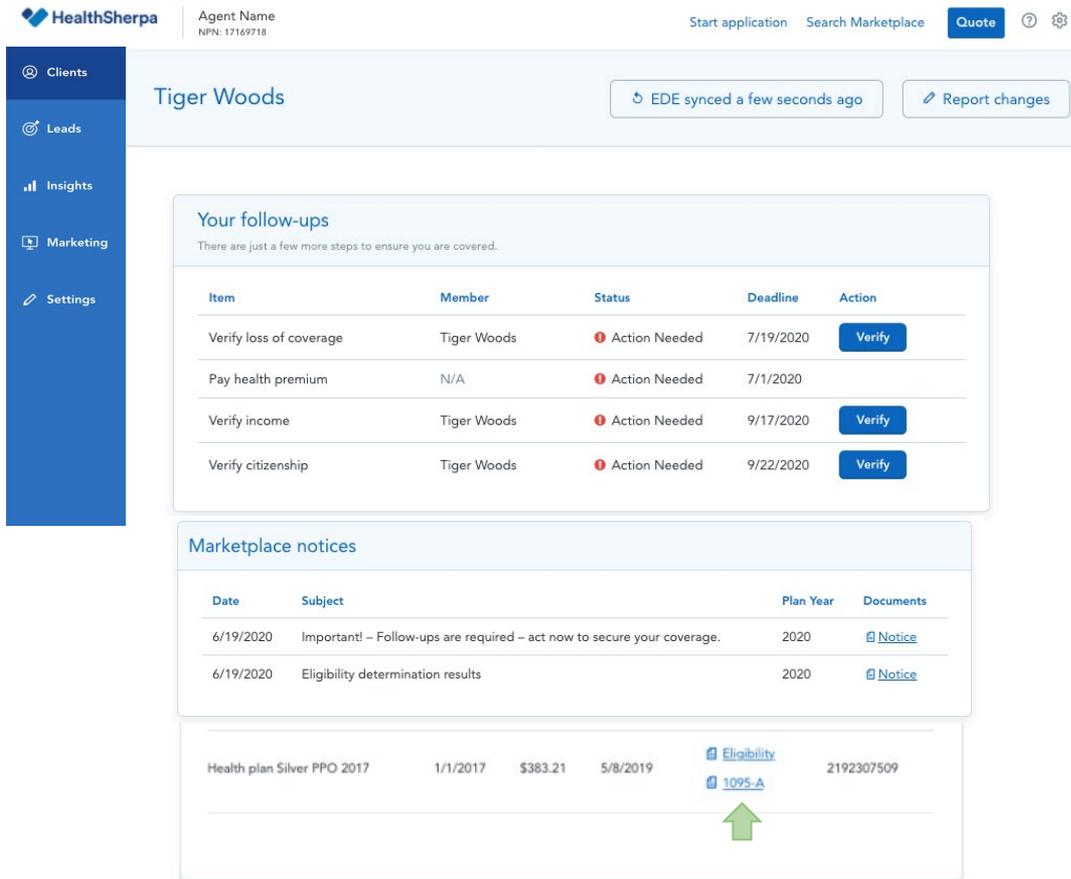
The data is presented in a table with the following columns: Client, Plan, Gross, Net, Effective, Created, Documents, Payment, and Actions. Two clients are listed:

Client	Plan	Gross	Net	Effective	Created	Documents	Payment	Actions
Jane Smith	Community Blue 70/50 \$4550	\$397.46	\$0.00	11/1/2022	10/10/2022	Action needed Due 01/08/23	Action needed As of today	View
Aqua Tester	Precision Blue 80/60 \$3400 (BR)	\$506.68	\$156.68	11/1/2022	10/10/2022	Action needed Due 01/08/23	Action needed As of today	View

At the bottom of the table, there is a pagination control showing '10 per page'.

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 status bar indicates 'EDE synced a few seconds ago' and a 'Report changes' button.

A left-hand navigation menu contains links for Clients, Leads, Insights, Marketing, and Settings.

The main content area is titled 'Your follow-ups' and contains a table with the following data:

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

Below this is a 'Marketplace notices' section with a table:

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

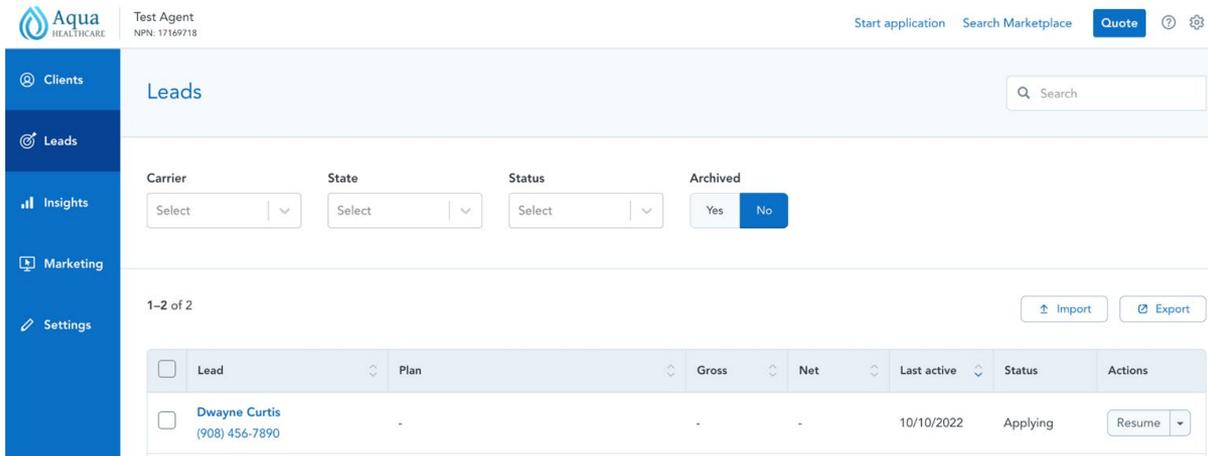
At the bottom, a summary row for 'Health plan Silver PPO 2017' is shown with details: 1/1/2017, \$383.21, 5/8/2019, and ID 2192307509. It includes links for 'Eligibility' and '1095-A', with a green arrow pointing to the 1095-A link.

Leads Tab

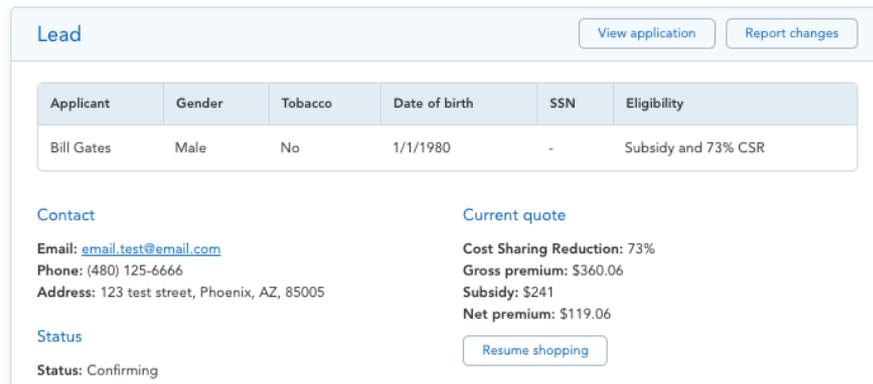
Displays all leads that have begun quoting, shopping or applying, but have not yet submitted an application.

Additional features

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



The screenshot shows the 'Leads' tab in the HealthSherpa interface. At the top, there's a navigation bar with 'Aqua HEALTHCARE' logo, 'Test Agent NPN: 17169718', and buttons for 'Start application', 'Search Marketplace', and 'Quote'. A search bar is located in the top right. A left sidebar contains navigation options: 'Clients', 'Leads' (selected), 'Insights', 'Marketing', and 'Settings'. Below the navigation, there are filter dropdowns for 'Carrier', 'State', and 'Status', and an 'Archived' toggle set to 'No'. A table below shows 1-2 of 2 leads. The table has columns for 'Lead', 'Plan', 'Gross', 'Net', 'Last active', 'Status', and 'Actions'. One lead is visible: 'Dwayne Curtis (908) 456-7890' with a status of 'Applying' and a 'Resume' button.



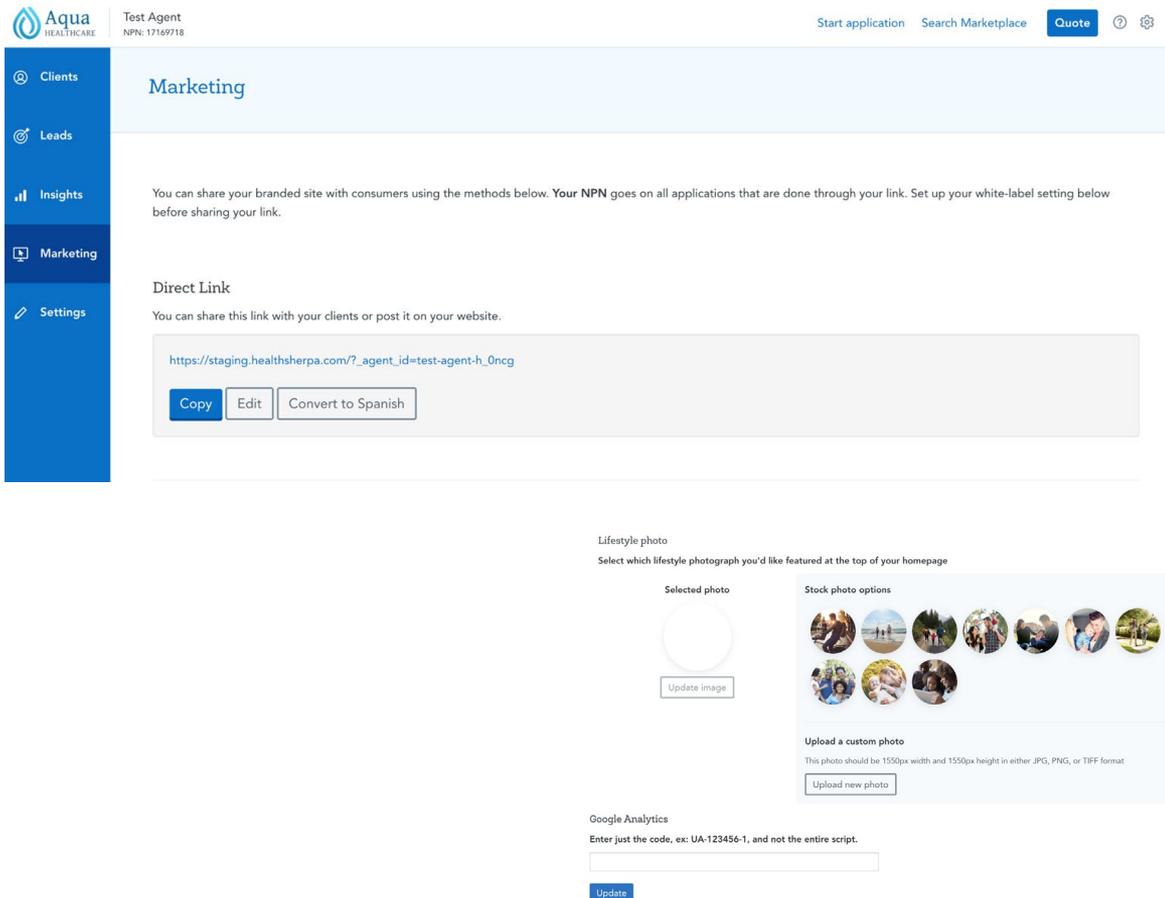
The screenshot shows the 'Lead' detail view. At the top, there are buttons for 'View application' and 'Report changes'. Below is a table with columns: 'Applicant', 'Gender', 'Tobacco', 'Date of birth', 'SSN', and 'Eligibility'. The data row shows: 'Bill Gates', 'Male', 'No', '1/1/1980', '-', and 'Subsidy and 73% CSR'. Below the table, there are sections for 'Contact' and 'Current quote'. The 'Contact' section includes: 'Email: email.test@email.com', 'Phone: (480) 125-6666', and 'Address: 123 test street, Phoenix, AZ, 85005'. The 'Current quote' section includes: 'Cost Sharing Reduction: 73%', 'Gross premium: \$360.06', 'Subsidy: \$241', and 'Net premium: \$119.06'. A 'Resume shopping' button is located at the bottom right.

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 shows the HealthSherpa Marketing tab interface. At the top, the user is identified as 'Test Agent' with NPN: 17169718. The interface includes a navigation sidebar with options: Clients, Leads, Insights, Marketing (selected), and Settings. The main content area is titled 'Marketing' and contains the following sections:

- Direct Link:** A text box containing the URL `https://staging.healthsherpa.com/?_agent_id=test-agent-h_0ncg`. Below the text box are buttons for 'Copy', 'Edit', and 'Convert to Spanish'.
- Lifestyle photo:** A section titled 'Lifestyle photo' with the instruction 'Select which lifestyle photograph you'd like featured at the top of your homepage'. It features a 'Selected photo' placeholder with an 'Update image' button and a 'Stock photo options' gallery of 12 circular images.
- Upload a custom photo:** A section with the instruction 'This photo should be 1550px width and 1550px height in either JPG, PNG, or TIFF format' and an 'Upload new photo' button.
- Google Analytics:** A section titled 'Google Analytics' with the instruction 'Enter just the code, ex: UA-123456-1, and not the entire script.' and an 'Update' button.

Servicing with Issuer Service Accounts (ISAs)

Product

- Accounts for internal agents that will allow users to enroll new consumers, or service consumers with an existing AOR without changing the NPN on record

Benefit

- Internal agents will be able to assist ANY consumers that call in
- Maintain good broker relationships while still assisting consumers
- Use ISAs to complete effectuation outreach and don't worry about erasing the AOR, just help the consumer get effectuated and take care of any outstanding follow ups

Start application

[Use our Healthcare.gov redirect](#)

Start by searching the Marketplace for an existing application. If we find a matching application, we'll load it for you to update. If not, you can start a new one.

First name	Last name
<input type="text" value="Dwayne"/>	<input type="text" value="Curtis"/>
Date of birth	Coverage state
<input type="text" value="03/17/1986"/>	<input type="text" value="Arizona"/>
<input checked="" type="checkbox"/> I've received permission from this consumer to work on their behalf.	

[Search the Marketplace](#)

[Or search by SSN](#)

Search results

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

Applicant	Application (Year)		
dwayne curtis SSN: ***-**-1410 DOB: 1986-03-17 450 RIVERCHASE PARKWAY EAST HOOVER, AL 35226	17182665 2021	Sale	Service
	16627909 2021	Sale	Service
	16894742 2021	Sale	Service
	17911471 2021	Sale	Service
	15950546 2021	Sale	Service

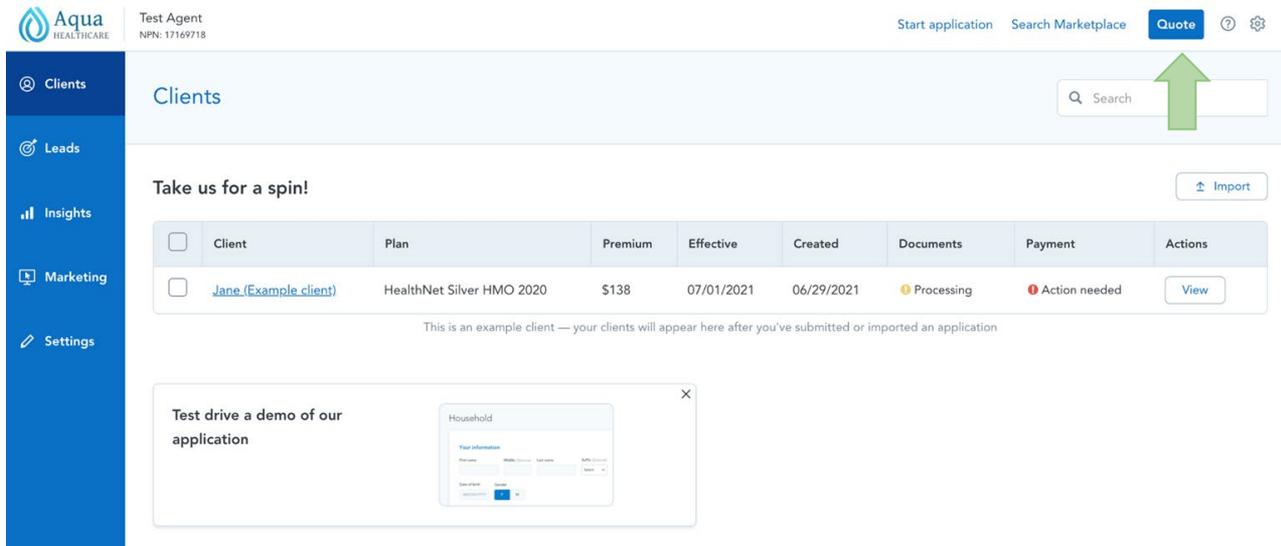




Broker Quoting

Broker Quoting

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



The screenshot displays the Aqua Healthcare interface. At the top, it shows the user's role as 'Test Agent' with NPN: 17169718. Navigation options include 'Start application', 'Search Marketplace', and a prominent 'Quote' button. A search bar is also present. The left sidebar contains menu items: Clients, Leads, Insights, Marketing, and Settings. The main content area is titled 'Clients' and features a table with the heading 'Take us for a spin!' and an 'Import' button. The table lists a client named 'Jane (Example client)' with details on plan, premium, effective date, creation date, and status. A modal window at the bottom offers a 'Test drive a demo of our application' with a preview of the application form.

Aqua HEALTHCARE Test Agent NPN: 17169718 Start application Search Marketplace Quote ? ⚙

Clients

Take us for a spin! Import

<input type="checkbox"/>	Client	Plan	Premium	Effective	Created	Documents	Payment	Actions
<input type="checkbox"/>	Jane (Example client)	HealthNet Silver HMO 2020	\$138	07/01/2021	06/29/2021	Processing	Action needed	View

This is an example client — your clients will appear here after you've submitted or imported an application

Test drive a demo of our application

Household

Your information

First Name: [input] Middle Name: [input] Last Name: [input] Birth Date: [input]

Sex of child: [input] Gender: [input] [Submit]

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

Your details

Zip code

66103

Household members

2

Who needs coverage?

Age

35

Gender

M

F

 Tobacco user Parent of child under 19 Pregnant Eligible for other coverage

Delete

Close

Household income

\$

60000

Eligibility

Savings

\$627/mo

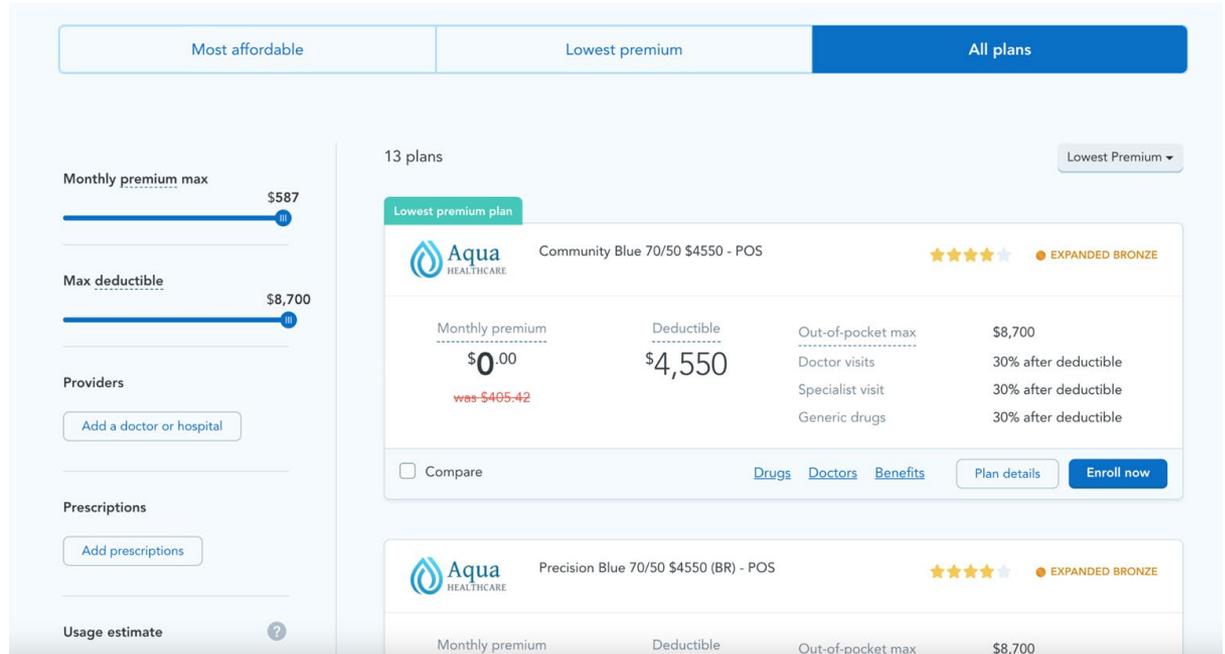
Broker Quoting

Quickly quote and search for QHPs

Additional features

Filters

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



The screenshot displays the HealthSherpa broker quoting interface. At the top, there are three tabs: "Most affordable", "Lowest premium", and "All plans" (which is selected). Below the tabs, the interface is divided into a left sidebar with filters and a main content area showing search results.

Filters (Left Sidebar):

- Monthly premium max:** A slider set to \$587.
- Max deductible:** A slider set to \$8,700.
- Providers:** A button labeled "Add a doctor or hospital".
- Prescriptions:** A button labeled "Add prescriptions".
- Usage estimate:** A button with a question mark icon.

Search Results (Main Content Area):

13 plans (Lowest Premium)

Lowest premium plan: Aqua Healthcare Community Blue 70/50 \$4550 - POS (EXPANDED BRONZE)

Monthly premium	Deductible	Out-of-pocket max	
\$0.00 <small>was \$405.42</small>	\$4,550	\$8,700	
		Doctor visits	30% after deductible
		Specialist visit	30% after deductible
		Generic drugs	30% after deductible

Buttons: Compare, Drugs, Doctors, Benefits, Plan details, Enroll now

Second Plan: Aqua Healthcare Precision Blue 70/50 \$4550 (BR) - POS (EXPANDED BRONZE)

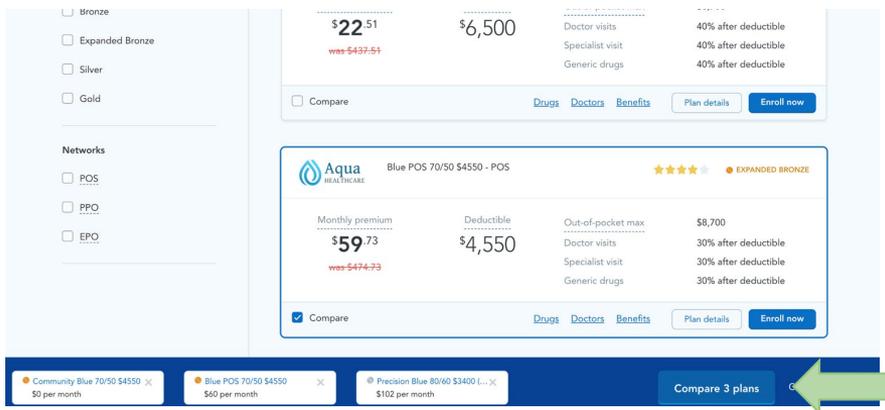
Monthly premium	Deductible	Out-of-pocket max	
		\$8,700	

Broker Quoting

Compare up to 5 plans side by side.

Additional features

- Plan Comparison
- Email to client



Bronze
 Expanded Bronze
 Silver
 Gold

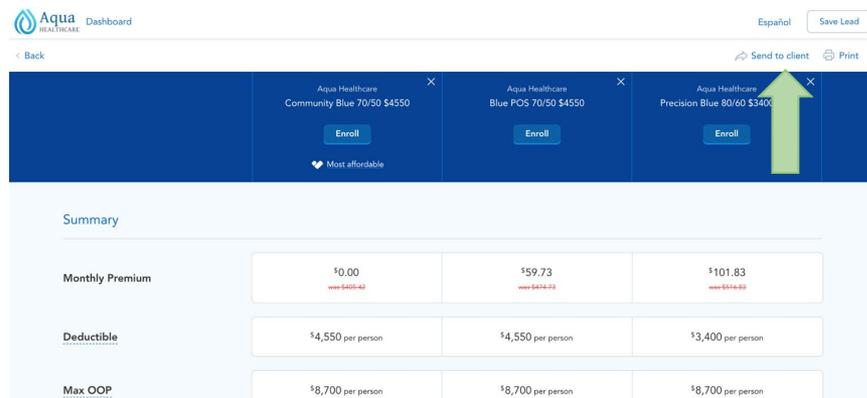
Compare [Drugs](#) [Doctors](#) [Benefits](#) [Plan details](#) [Enroll now](#)

Aqua HEALTHCARE Blue POS 70/50 \$4550 - POS ★★★★☆ EXPANDED BRONZE

Monthly premium	Deductible	Out-of-pocket max	\$8,700
\$22.51 <small>was \$437.51</small>	\$6,500	Doctor visits	40% after deductible
		Specialist visit	40% after deductible
		Generic drugs	40% after deductible

Compare [Drugs](#) [Doctors](#) [Benefits](#) [Plan details](#) [Enroll now](#)

Community Blue 70/50 \$4550 \$0 per month Blue POS 70/50 \$4550 \$60 per month Precision Blue 80/60 \$3400 L... \$102 per month [Compare 3 plans](#)



Aqua Healthcare Dashboard Español [Save Lead](#)

[Back](#) [Send to client](#) [Print](#)

	Aqua Healthcare Community Blue 70/50 \$4550 Enroll Most affordable	Aqua Healthcare Blue POS 70/50 \$4550 Enroll	Aqua Healthcare Precision Blue 80/60 \$3400 Enroll
--	---------------------------------------------------------------------------------------------	--------------------------------------------------------------------	--------------------------------------------------------------------------

Summary

Monthly Premium	\$0.00 <small>was \$400.00</small>	\$59.73 <small>was \$614.63</small>	\$101.83 <small>was \$114.63</small>
Deductible	\$4,550 per person	\$4,550 per person	\$3,400 per person
Max OOP	\$8,700 per person	\$8,700 per person	\$8,700 per person

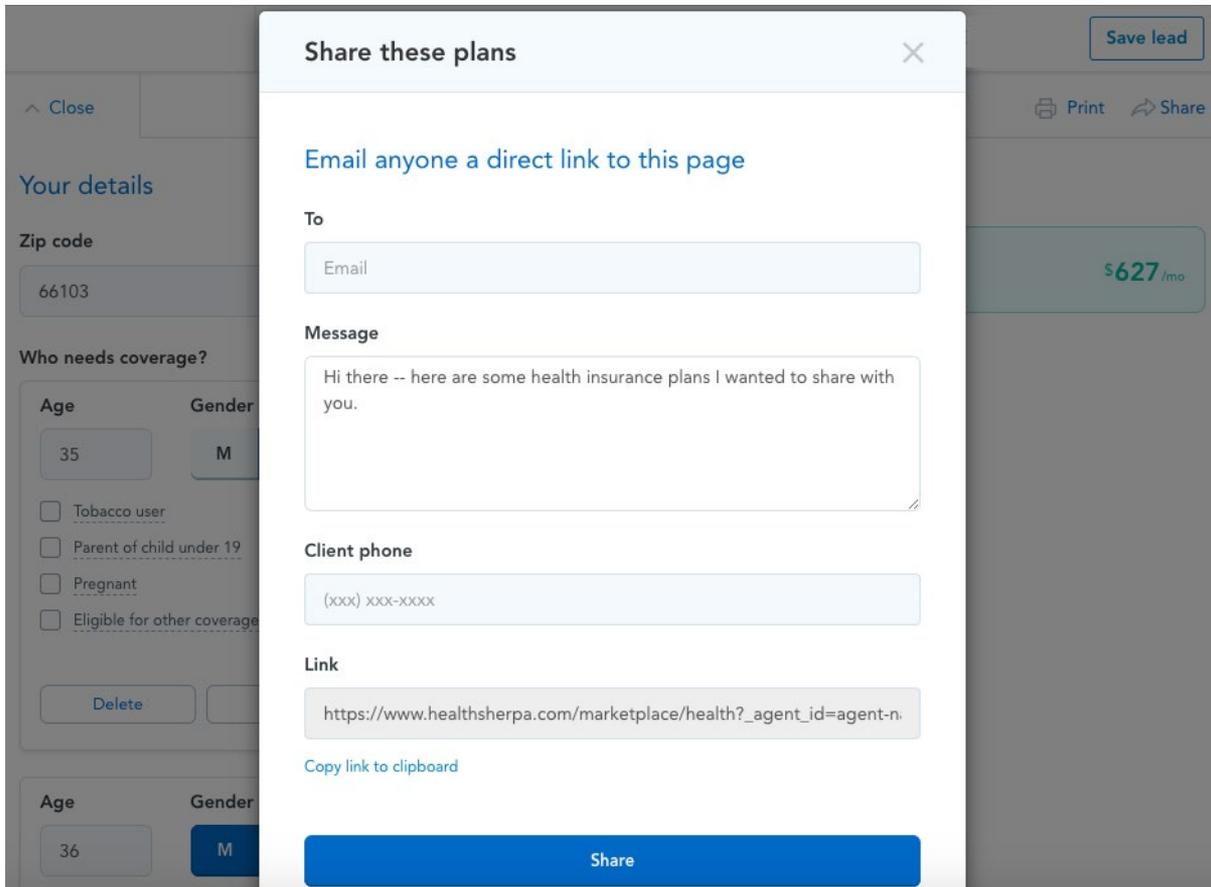
Broker Quoting

→ 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 quote form. The modal has a close button (X) in the top right corner. Below the title, there is a heading 'Email anyone a direct link to this page'. The form 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' option. At the bottom of the modal is a large blue 'Share' button. The background shows a quote form with fields for 'Zip code' (66103), 'Who needs coverage?' (checkboxes for Tobacco user, Parent of child under 19, Pregnant, Eligible for other coverage), and 'Age' (35) and 'Gender' (M) fields.

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

Close

Your details

Zip code

66103

Who needs coverage?

Age Gender

35 M

Tobacco user

Parent of child under 19

Pregnant

Eligible for other coverage

Delete

Age Gender

36 M

Save lead

Print Share

\$627 /mo

Broker Quoting

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

 Precision Blue 70/50 \$4550 (BR) - POS ★★★★☆ ● EXPANDED BRONZE

Monthly premium	Deductible	Out-of-pocket max	
\$16.54 <small>was \$431.54</small>	\$4,550	Doctor visits	\$8,700
		Specialist visit	30% after deductible
		Generic drugs	30% after deductible

Compare [Drugs](#) [Doctors](#) [Benefits](#)

 Blue POS 60/40 \$6500 - POS ★★★★☆ ● BRONZE

Monthly premium	Deductible	Out-of-pocket max	
\$22.51 <small>was \$437.51</small>	\$6,500	Doctor visits	\$8,700
		Specialist visit	40% after deductible
		Generic drugs	40% after deductible

Compare [Drugs](#) [Doctors](#) [Benefits](#)



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

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.

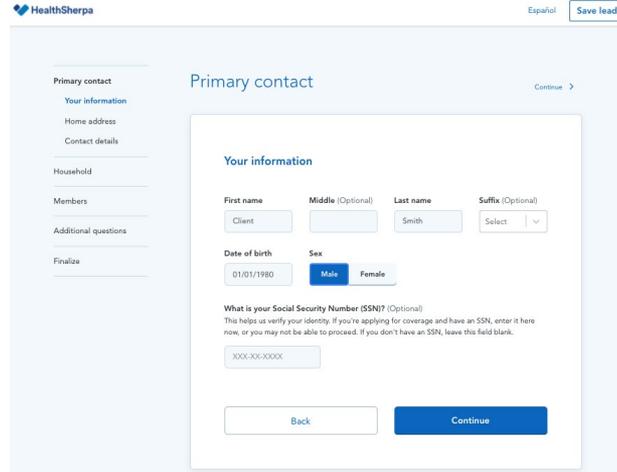
Back

Continue

Primary contact information

Additional Information

- Entire application is dynamic and streamlined.



HealthSherpa Español Save lead

Primary contact Continue >

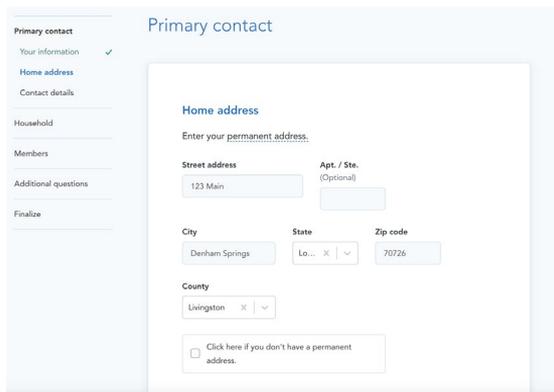
Your information

First name: Client Middle (Optional): Sex: Smith Suffix (Optional): Select

Date of birth: 01/01/1980 Sex: 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



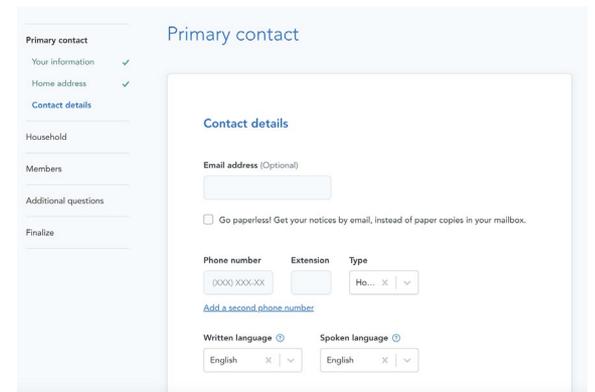
Primary contact Continue >

Home address

Enter your permanent address.

Street address: 123 Main Apt. / Ste. (Optional): City: Denham Springs State: La... Zip code: 70726 County: Livingston

Click here if you don't have a permanent address.



Primary contact Continue >

Contact details

Email address (Optional):

Go paperless! Get your notices by email, instead of paper copies in your mailbox.

Phone number: (XXX) XXX-XX Extension: Type: Ho...

[Add a second phone number](#)

Written language: English Spoken language: English

*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

Household

Who's applying?

Residence

Tax household

Members

Additional questions

Finalize

Who's applying for coverage?

Is Aqua Tester applying for coverage?

Yes No

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

Note: The new American Rescue Plan Act may qualify high income households for savings.

Yes No

Who else is applying for coverage? ⓘ

*Note: Application steps vary by household

Tax Household Additional Information

Additional Information

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

Primary contact ✓ Household

Household

Who's applying? ✓

Residence ✓

Tax household

Additional information

Members

Income

Additional questions

Finalize

Your tax information

Are you married? ⓪

Yes No

Do you plan to file a federal income tax return for 2022?
You don't have to file taxes to apply for coverage, but you'll need to file next year if you want to get a premium tax credit to help pay for coverage now.

Yes No

Are you claiming any dependents on your taxes for 2022?

Yes No

Will you be claimed as a tax dependent by someone else for 2022?

Yes No

Primary contact ✓

Household ✓

Additional information

Other family relationships

Members

Income

Additional questions

Finalize

Additional Relationship Information

Other relationships for Aqua Tester

Does Aqua Tester live with someone under the age of 19?

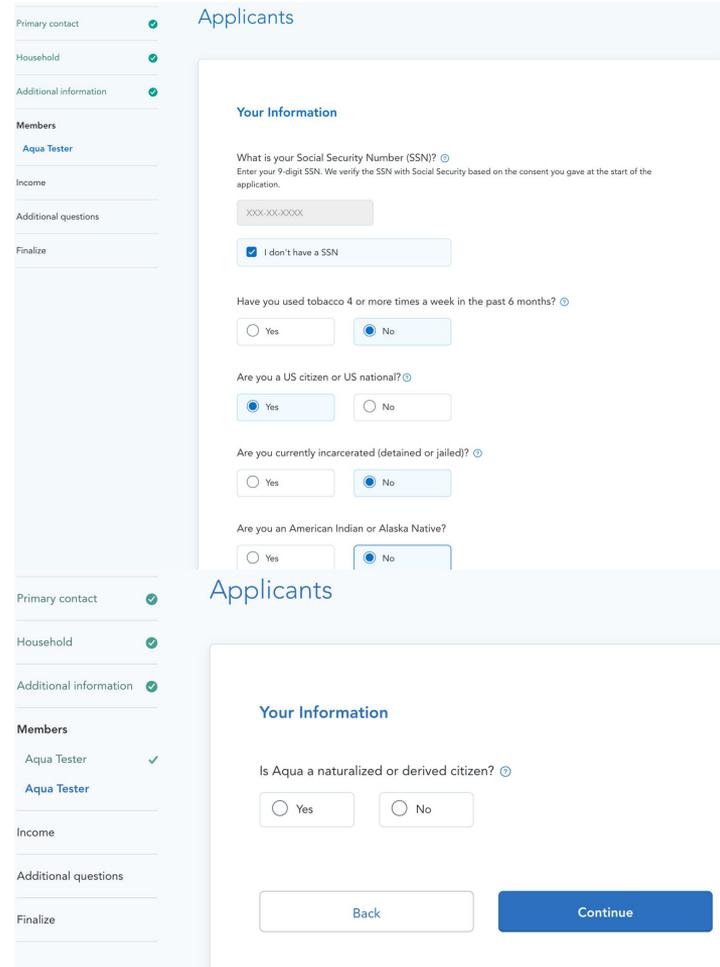
Yes No

*Note: Application steps vary by household

Member Information

Additional Information

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



Primary contact

Household

Additional information

Members

Aqua Tester

Income

Additional questions

Finalize

Applicants

Your Information

What is your Social Security Number (SSN)? ⓘ
Enter your 9-digit SSN. We verify the SSN with Social Security based on the consent you gave at the start of the application.

XXXX-XX-XXXX

I don't have a SSN

Have you used tobacco 4 or more times a week in the past 6 months? ⓘ

Yes No

Are you a US citizen or US national? ⓘ

Yes No

Are you currently incarcerated (detained or jailed)? ⓘ

Yes No

Are you an American Indian or Alaska Native?

Yes No

Primary contact

Household

Additional information

Members

Aqua Tester

Aqua Tester

Income

Additional questions

Finalize

Applicants

Your Information

Is Aqua a naturalized or derived citizen? ⓘ

Yes No

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

Aqua Tester

Additional questions

Finalize

Income information

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 Aqua Tester

Does Aqua currently get any income?

Yes No

Tell us about any income Aqua will have this month.

Type	How much	<input type="button" value="Remove all"/>
Job / Hydration (5031236655)	\$1,500.00 every two weeks	<input type="button" value="Edit"/> <input type="button" value="Remove"/>

Deductions for Aqua Tester

Additional Questions

- Extra Help
- Additional Coverage

Primary contact

Household

Additional information

Members

Income

Additional questions

Extra help

Coverage

Employer coverage

Additional questions

Finalize

Additional questions

Extra help

Do any of these people have a disability or mental health condition that limits their ability to work, attend school, or take care of their daily needs? (Optional) ⓘ

Aqua Tester

Do any of these people need help with daily activities (like dressing or using the bathroom), or live in a medical facility or nursing home? (Optional) ⓘ

Aqua Tester

Additional coverage questions

Did any of these people have Medicaid or Children's Health Insurance Program (CHIP) coverage that will end soon or that recently ended because of a change in eligibility?

Aqua Tester

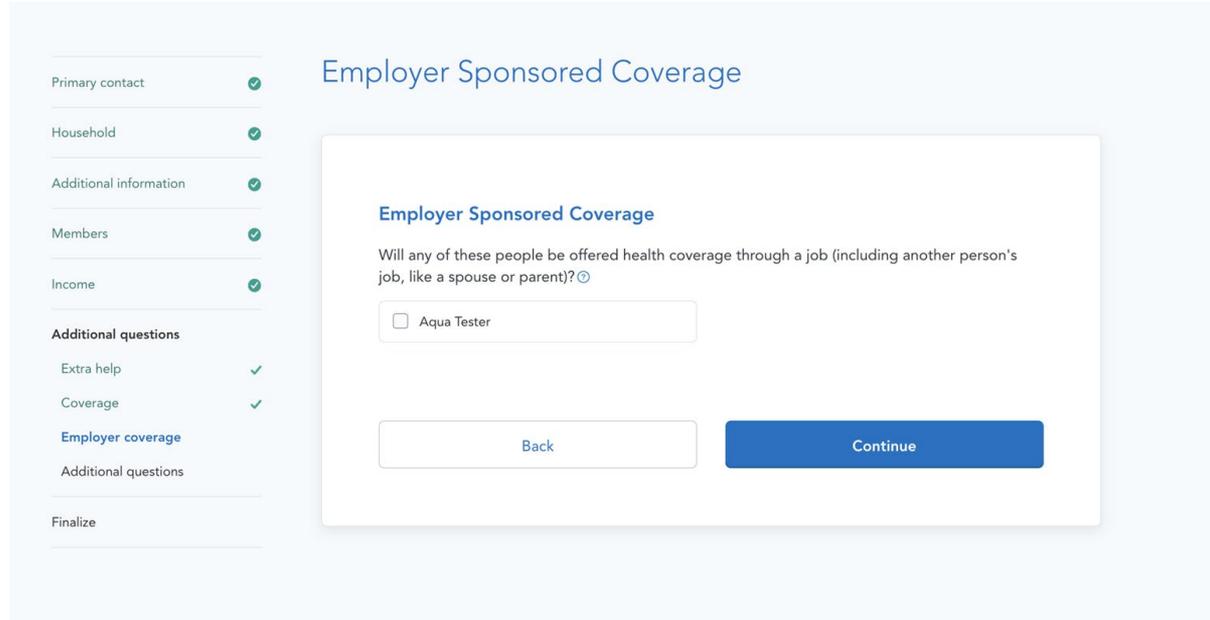
Were any of these people found not eligible for Medicaid or Children's Health Insurance Program (CHIP) in the past 90 days? ⓘ

Aqua Tester

*Note: Application steps vary by household

Additional Questions

- Employer sponsored coverage



Primary contact ✓

Household ✓

Additional information ✓

Members ✓

Income ✓

Additional questions

Extra help ✓

Coverage ✓

Employer coverage

Additional questions

Finalize

Employer Sponsored Coverage

Employer Sponsored Coverage

Will any of these people be offered health coverage through a job (including another person's job, like a spouse or parent)? ⓘ

Aqua Tester

Back Continue

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 12/9/2022?

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

Aqua Tester

Recent changes

Select any of the life changes that apply to any of the applicants. If no life changes apply, and you missed OEP due to Covid-19, you may still be able to enroll by calling the [Marketplace](#).

Lost qualifying health coverage

Got married

Changed primary place of living

Select all that apply

Aqua Tester

When did Aqua Tester move?

10/01/2000

Check here if Aqua Tester moved from a foreign country or U.S. territory.

Previous ZIP code: 85001

Previous county: Maricopa

Previous state: Arizona

You must have moved to a different ZIP code or county, or moved to the U.S. from a foreign country or a U.S. territory to be eligible for a Special Enrollment Period because you moved.

*Note: Application steps vary by household

Finalize the Application

Additional Information

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

Finalize

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

[Print](#)

- Primary contact ✓
- Household ✓
- Additional information ✓
- Members ✓
- Income ✓
- Additional questions ✓

Finalize

[Review](#)

Agreements

Tax attestation

Sign and submit

Primary contact

[Edit](#)

Full name: Aqua Tester
Address: 123 Main , Denham Springs, LA 70726
Phone number: (503) 123-1234
Email:
Get updates by email: No
Preferred written language: English
Preferred spoken language: English

Household members

[Edit](#)

Name	DOB	SSN	Relationship	Sex	Applying
Aqua Tester	1989-10-10		Self	Male	Yes

Household income

[Edit](#)

Name	Type	Amount
Aqua Tester	Job	\$38,970.00

Household deductions

[Edit](#)

*Note: Application steps vary by household

Agreements

Additional Information

- Quickly complete agreements and electronically sign an application.

Finalize

- Primary contact ✓
- Household ✓
- Additional information ✓
- Members ✓
- Income ✓
- Additional questions ✓

Finalize

- Review ✓
- Agreements**
- Tax attestation
- Sign and submit

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 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

Tax attestation

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

I understand that I'm not eligible for a premium tax credit if I'm found eligible for other qualifying health coverage, like Medicaid, Children's Health Insurance Program (CHIP), or a job-based health plan. I also understand that if I become eligible for other qualifying health coverage, I must contact the Marketplace to end my Marketplace coverage and premium tax credit. If I don't, the person who files taxes in my household may need to pay back my premium tax credit.

Yes No

I understand that because the premium tax credit will be paid on my behalf to reduce the cost of health coverage for myself and/or my dependents:

- I must file a federal income tax return for the 2022 tax year.
- If I'm married at the end of 2022, I must file a joint income tax return with my spouse.

I also expect that:

- No one else will be able to claim me as a dependent on their 2022 federal income tax return.
- I'll claim a personal exemption deduction on my 2022 federal income tax return for any individual listed on this application as my dependent who is enrolled in coverage through this Marketplace, and whose premium for coverage is paid in whole or in part by advance payments of the premium tax credit.

If any of the above changes:

- I understand that it may impact my ability to get the premium tax credit.
- I also understand that when I file my 2022 federal income tax return, the Internal Revenue Service (IRS) will compare the income on my tax return with the income on my application. I understand that if the income on my tax return is lower than the amount of income on my application, I may be eligible to get an additional premium tax credit amount. On the other hand, if the income on my tax return is higher than the amount of income on my application, I may owe additional federal income tax.

Yes No

Sign and Submit

Additional Information

- Quickly complete agreements and electronically sign an application.

Finalize

- Primary contact ✓
- Household ✓
- Additional information ✓
- Members ✓
- Income ✓
- Additional questions ✓
- Finalize**
- Review ✓
- Agreements ✓
- Tax attestation ✓
- Sign and submit**

Sign and submit

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

I know that I must tell the program I'll be enrolled in if information I listed on this application changes. I know I can make changes in myMarketplace account or by calling Marketplace Call Center at 1-800-318-2596 (TTY: 1-855-889-4325). I know a change in my information could affect eligibility for member(s) of my household. ⓘ

Agree Disagree

If anyone on your application is enrolled in Marketplace coverage and is later found to have other qualifying health coverage (like Medicare, Medicaid, or Children's Health Insurance Program (CHIP)), the Marketplace will automatically end their Marketplace plan coverage. This will help make sure that anyone who's found to have other qualifying coverage won't stay enrolled in Marketplace coverage and have to pay full cost.

I agree to allow the Marketplace to end the Marketplace coverage of the people on my application in this situation.

I don't give the Marketplace permission to end Marketplace coverage in this situation. I understand that the affected people on my application will no longer be eligible for financial help and must pay full cost for their Marketplace plan.

Sign

I'm signing this application under penalty of perjury, which means I've provided true answers to all of the questions to the best of my knowledge. I know I may be subject to penalties under federal law if I intentionally provide false information.

Agree Disagree

Aqua Tester, type your full name below to sign electronically.

*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.

Eligibility Results

Name	Eligibility
 Aqua Tester	Eligible to enroll in a Marketplace plan, due to a Special Enrollment Period (loss of coverage) Eligible for a tax credit Follow-ups required: Verify loss of coverage Verify income by 1/8/2023 Verify citizenship by 1/13/2023

Your household qualifies for a **total monthly tax credit of \$350.**

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.

Review plan

Not ready to enroll?

[Edit application](#)

Confirm plan selection

- Make changes to plan selection if necessary

Confirm your plan

Based on your eligibility results, here's what your plan will look like.

Plan summary

 Aqua HEALTHCARE	Precision Blue 80/60 \$3400 (BR) - POS	SILVER
<u>Premium</u> \$ 156.68 / mo <small>\$506.68 first price</small>	<u>Deductible</u> \$3,400 / yr	<u>Out of pocket</u> \$8,700 / yr

Savings

Your household qualifies for a \$350 per month savings on your premium.

I want to apply all of my savings

Eligibility summary

Name	Covered by this plan	Next step
<input checked="" type="checkbox"/> Aqua Tester	Yes	Enroll

Enroll in this plan

Not ready to enroll?

[Edit application](#)

[Change plans](#)

Confirmation Page

Additional Information

- Review effectuation documents and return to the clients details page to submit necessary documents and make payment.

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:**
 - Aqua Tester
Verify loss of coverage by 11/9/2022

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. Log into your dashboard to pay your premium of **\$156.68** by 10/31/2022. You will not be able to pay until you verify your eligibility.

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.



Precision Blue 80/60 \$3400 (BR)

\$156.68/mo



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.

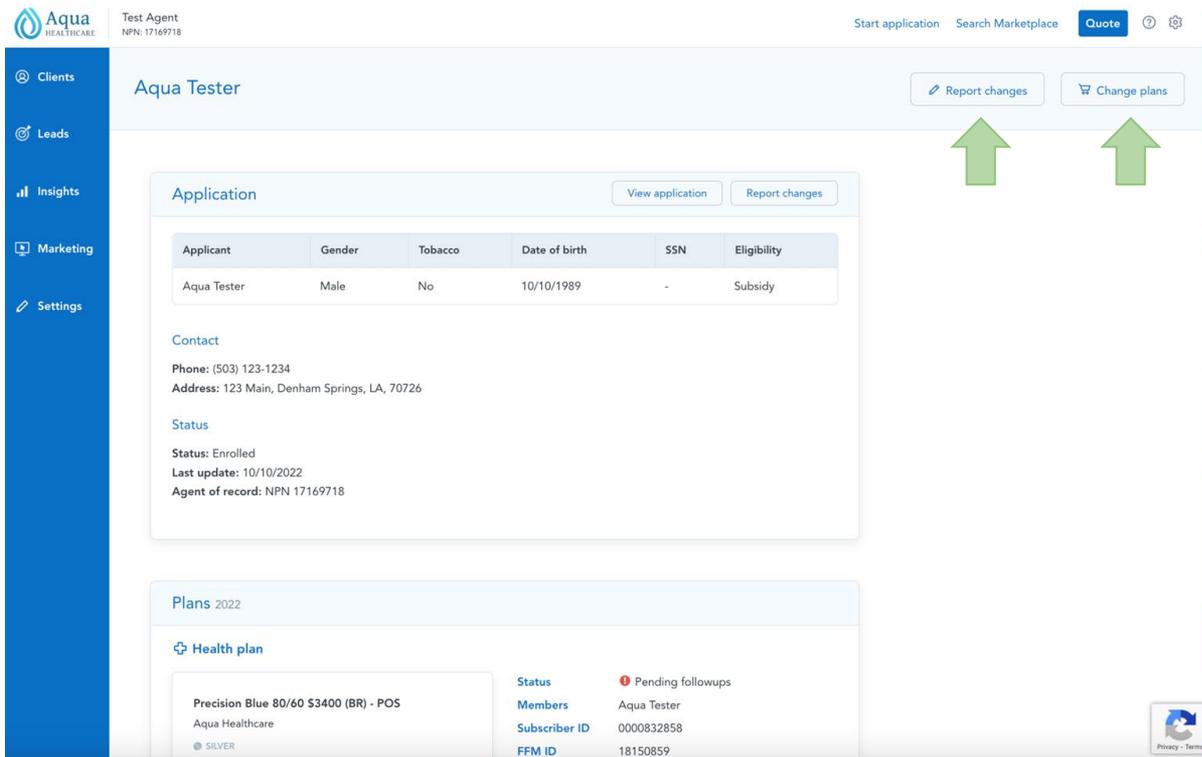
1. Verify Loss of coverage for Christopher Client by **3/12/2019**.

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.



Aqua HEALTHCARE Test Agent
NPN: 17169718

Start application Search Marketplace **Quote** ⓘ ⚙️

Aqua Tester [Report changes](#) [Change plans](#)

Application

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

Applicant	Gender	Tobacco	Date of birth	SSN	Eligibility
Aqua Tester	Male	No	10/10/1989	-	Subsidy

Contact

Phone: (503) 123-1234
Address: 123 Main, Denham Springs, LA, 70726

Status

Status: Enrolled
Last update: 10/10/2022
Agent of record: NPN 17169718

Plans 2022

Health plan

Precision Blue 80/60 \$3400 (BR) - POS Aqua Healthcare ● SILVER	Status ● Pending followups Members Aqua Tester Subscriber ID 0000832858 FFM ID 18150859
------------------------------------------------------------------------------	---------------------------------------------------------------------------------------------------------------------------------------------------------------

[Privacy - Terms](#)

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.

Plans 2022

Health plan

Precision Blue 80/60 \$3400 (BR) - POS
Aqua Healthcare

SILVER

\$156.68 Premium Was \$506.68	\$3,400 Deductible	\$8,700 Out of pocket max
-------------------------------------	-----------------------	------------------------------

[View plan details](#)

Status 🔴 Pending followups

Members Aqua Tester

Subscriber ID 0000832858

FFM ID 18150859

Effective 11/1/2022

Expiration 12/31/2022

Documents [Summary of benefits](#)

Carrier phone: (555) 555-5555

Payment phone (555) 555-5555

[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

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](#)

DISCLAIMER: By submitting your information you agree that



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

[Add my spouse](#)

[Add a dependent](#)

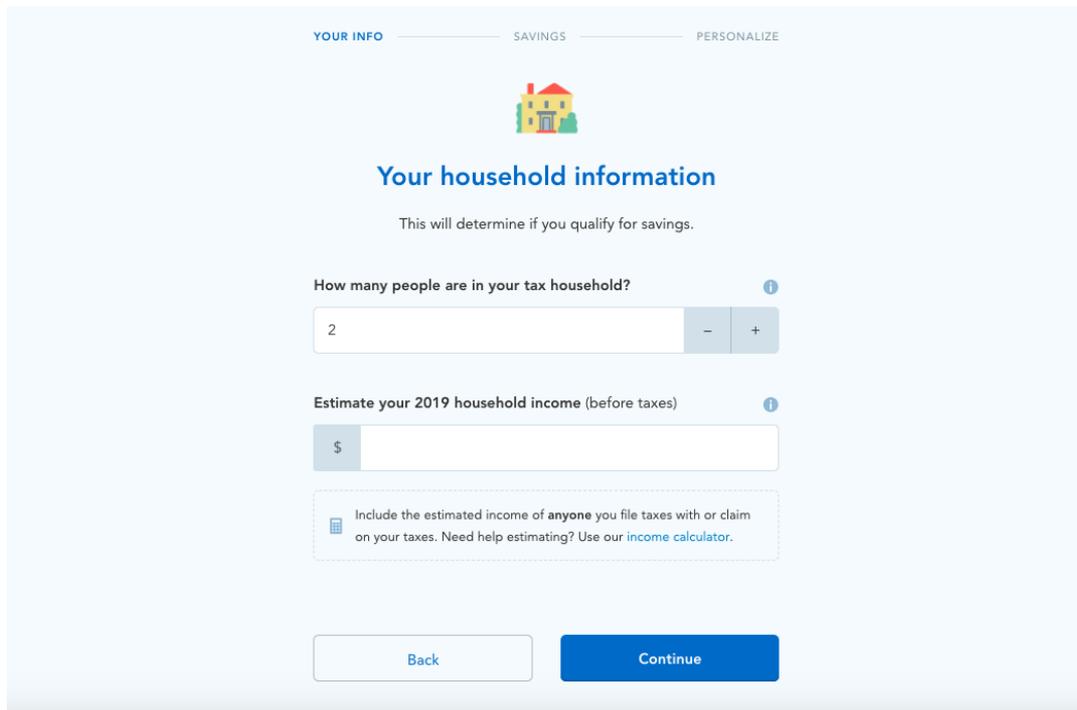
[Back](#) [Continue](#)

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](#).

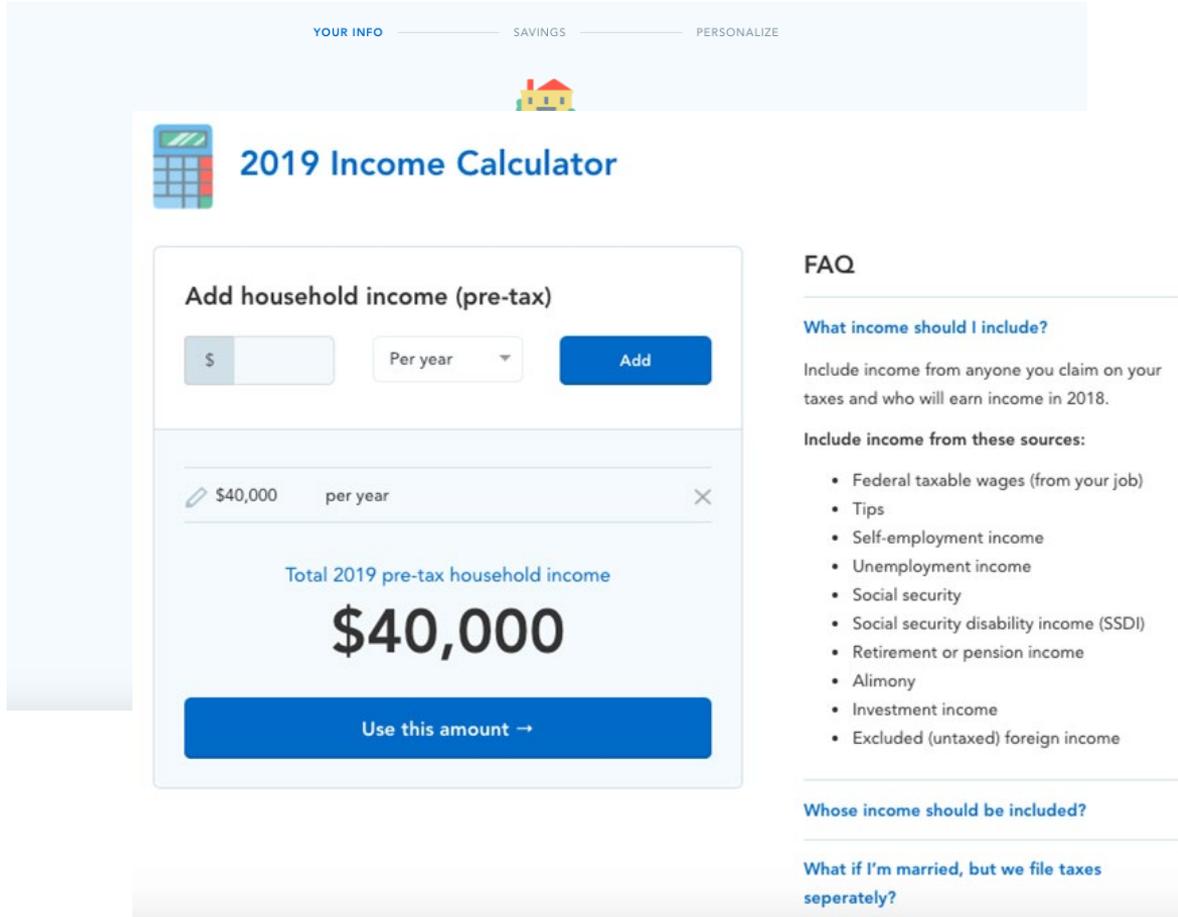
[Back](#) [Continue](#)

Client Self Enrollment

Income Calculator

Calculate income

- Annual
- Monthly
- Weekly
- Per Project



The screenshot shows the HealthSherpa website's "2019 Income Calculator" interface. At the top, there are navigation links for "YOUR INFO", "SAVINGS", and "PERSONALIZE". Below these is a house icon. The main heading is "2019 Income Calculator" with a calculator icon. The primary input section is titled "Add household income (pre-tax)" and includes a currency selector set to "\$", a frequency dropdown set to "Per year", and an "Add" button. Below this, a summary box shows "Total 2019 pre-tax household income" as "\$40,000" with a "Use this amount →" button. To the right, there is an "FAQ" section with questions like "What income should I include?" and "Whose income should be included?".

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:

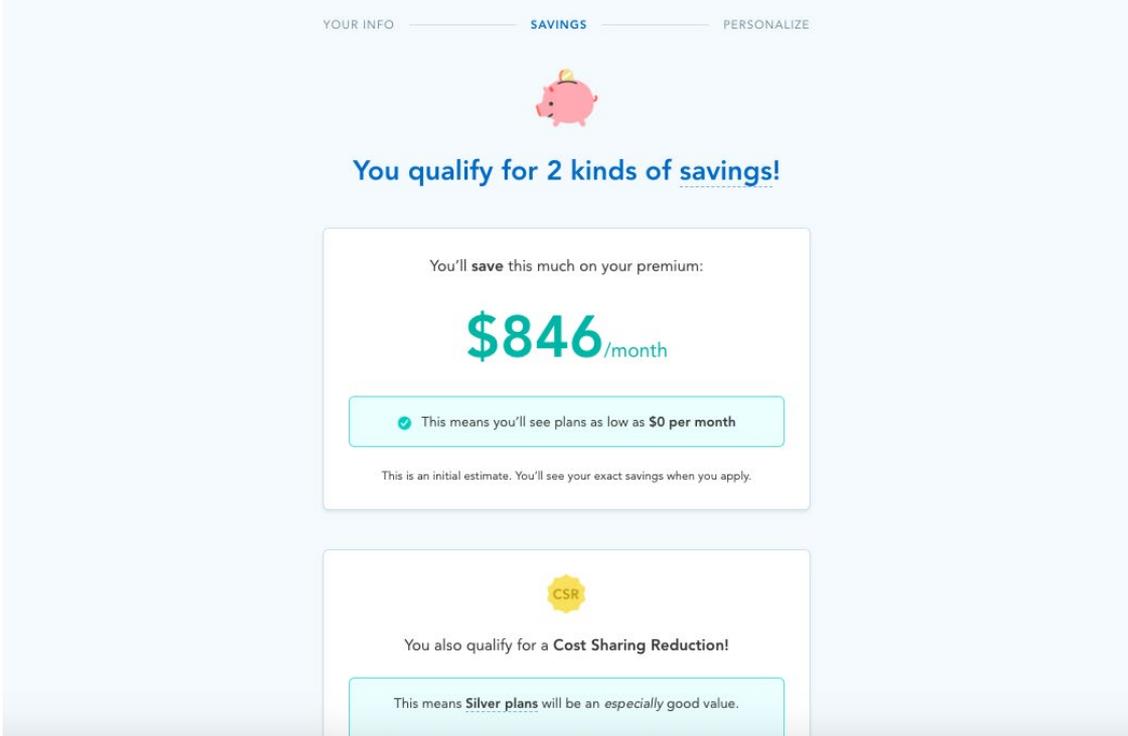
- Federal taxable wages (from your job)
- Tips
- Self-employment income
- Unemployment income
- Social security
- Social security disability income (SSDI)
- Retirement or pension income
- Alimony
- Investment income
- Excluded (untaxed) foreign income

[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.



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 [i](#)
- Change in household size [i](#)
- Change in primary place of living [i](#)
- Change in eligibility [i](#)
- Enrollment / plan error [i](#)
- Other situations [i](#)
- None of the above

Personalized Quoting

How much healthcare do you think you'll use in 2022?

A guess is fine—this will not affect your prices and will not limit how much you can use.

I expect to use a **Low** amount of healthcare services:

- doctor visit
- lab or test
- specialist visit
- hospital visit
- prescription drug
- emergency room visit

I expect to use a **Medium** amount of healthcare services:

- doctor visit
- lab or test
- specialist visit
- hospital visit
- prescription drugs
- emergency room visit

I expect to use a **High** amount of healthcare services:

- doctor visits
- labs or tests
- specialist visits
- hospital visit
- prescription drugs
- emergency room visit

Why do we ask for this?

This will help us select your **Recommended Plan**

[Back](#)[Continue](#)

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



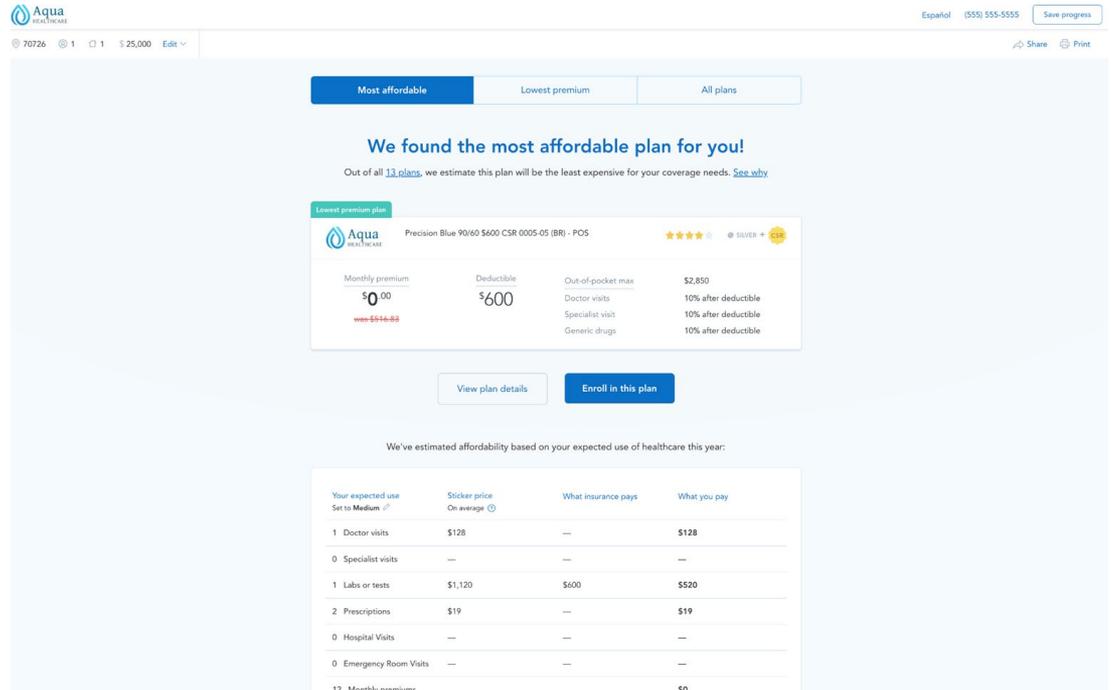
Do you take any prescription drugs?

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 Recommendation



Aqua at work

70726 1 1 \$ 25,000 Edit

Español (555) 555-5555 Save progress

Share Print

Most affordable | Lowest premium | All plans

We found the most affordable plan for you!

Out of all [13 plans](#), we estimate this plan will be the least expensive for your coverage needs. [See why](#)

Lowest premium plan

Aqua at work Precision Blue 90/60 \$600 CSR 0005-05 (BR) - POS ★★★★★ SILVER + CSR

Monthly premium	Deductible	Out-of-pocket max	\$2,850
\$0.00 www.\$544.88	\$600	Doctor visits: 10% after deductible Specialist visit: 10% after deductible Generic drugs: 10% after deductible	

View plan details | Enroll in this plan

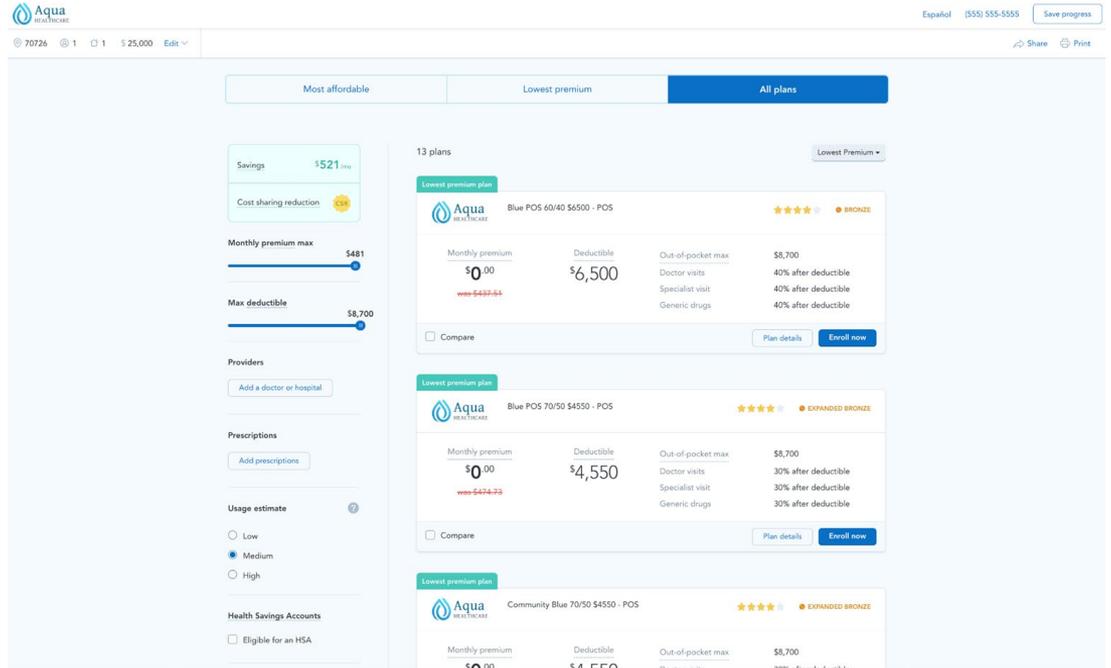
We've estimated affordability based on your expected use of healthcare this year:

Your expected use	Sicker price	What insurance pays	What you pay
Set to Medium	On average		
1 Doctor visits	\$128	—	\$128
0 Specialist visits	—	—	—
1 Labs or tests	\$1,120	\$600	\$520
2 Prescriptions	\$19	—	\$19
0 Hospital Visits	—	—	—
0 Emergency Room Visits	—	—	—
12 Monthly premiums			\$0

Client Self Enrollment

Additional filters

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



The screenshot displays the HealthSherpa client self-enrollment interface. At the top, the Aqua logo and contact information (Español, (555) 555-5555, Save progress) are visible. The main navigation bar includes 'Most affordable', 'Lowest premium', and 'All plans' (selected). The left sidebar contains filters for Savings (\$521/mo), Cost sharing reduction (50%), Monthly premium max (\$481), Max deductible (\$8,700), Providers (Add a doctor or hospital), Prescriptions (Add prescriptions), Usage estimate (Low, Medium, High), and Health Savings Accounts (Eligible for an HSA).

The main content area shows 13 plans, with the 'Lowest Premium' filter selected. Three plan cards are visible:

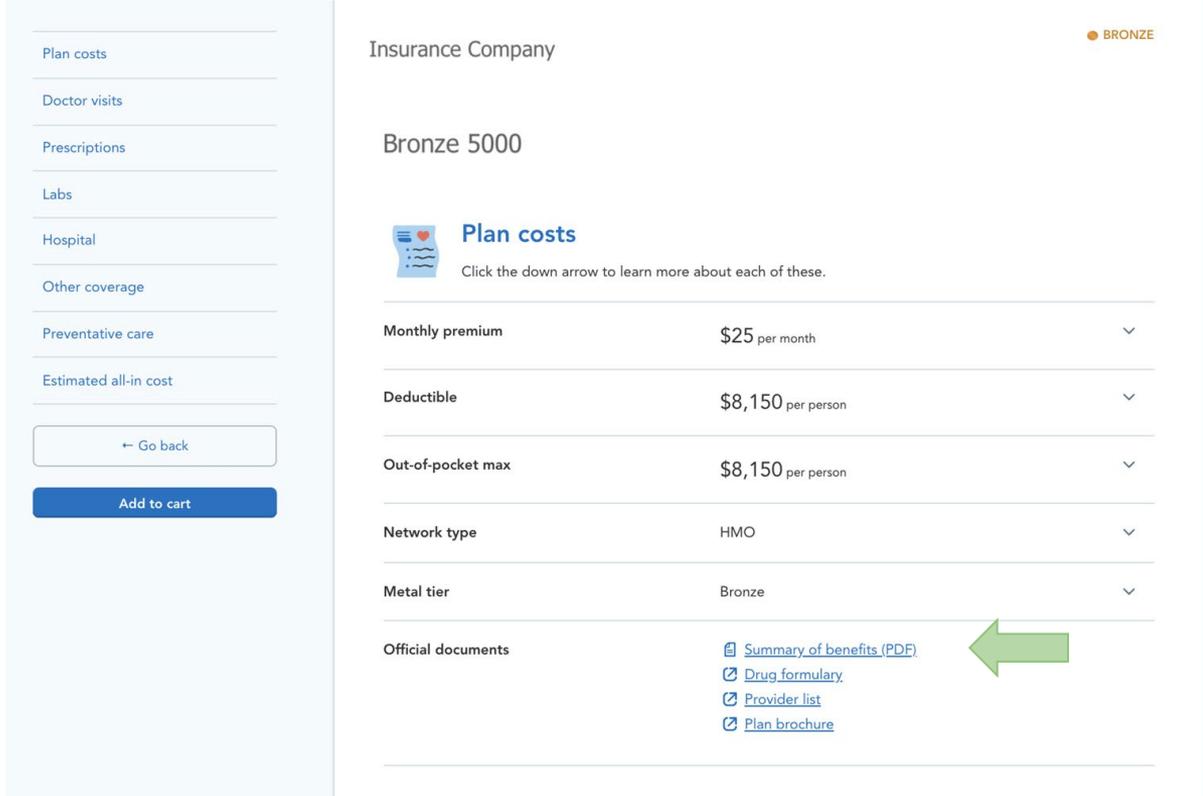
- Blue POS 60/40 \$4500 - POS** (BRONZE): Monthly premium \$0.00, Deductible \$6,500, Out-of-pocket max \$8,700. Doctor visits: 40% after deductible; Specialist visit: 40% after deductible; Generic drugs: 40% after deductible.
- Blue POS 70/50 \$4550 - POS** (EXPANDED BRONZE): Monthly premium \$0.00, Deductible \$4,550, Out-of-pocket max \$8,700. Doctor visits: 30% after deductible; Specialist visit: 30% after deductible; Generic drugs: 30% after deductible.
- Community Blue 70/50 \$4550 - POS** (EXPANDED BRONZE): Monthly premium \$0.00, Deductible \$4,550, Out-of-pocket max \$8,700. Doctor visits: 30% after deductible.

Client Self Enrollment

- Plan details page

Additional Information

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



The screenshot displays the 'Plan costs' section of a client self-enrollment page. On the left, a vertical sidebar contains a list of navigation options: Plan costs, Doctor visits, Prescriptions, Labs, Hospital, Other coverage, Preventative care, and Estimated all-in cost. Below this list are two buttons: 'Go back' and 'Add to cart'. The main content area shows the 'Insurance Company' as 'Bronze 5000' with a 'BRONZE' tier indicator. A 'Plan costs' section includes a sub-header 'Click the down arrow to learn more about each of these.' followed by a table of plan details. The table lists 'Monthly premium' (\$25 per month), 'Deductible' (\$8,150 per person), 'Out-of-pocket max' (\$8,150 per person), 'Network type' (HMO), and 'Metal tier' (Bronze). Below the table, under 'Official documents', there are four links: 'Summary of benefits (PDF)', 'Drug formulary', 'Provider list', and 'Plan brochure'. A green arrow points to the 'Summary of benefits (PDF)' link.

Plan costs

Doctor visits

Prescriptions

Labs

Hospital

Other coverage

Preventative care

Estimated all-in cost

← Go back

Add to cart

Insurance Company BRONZE

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](#)

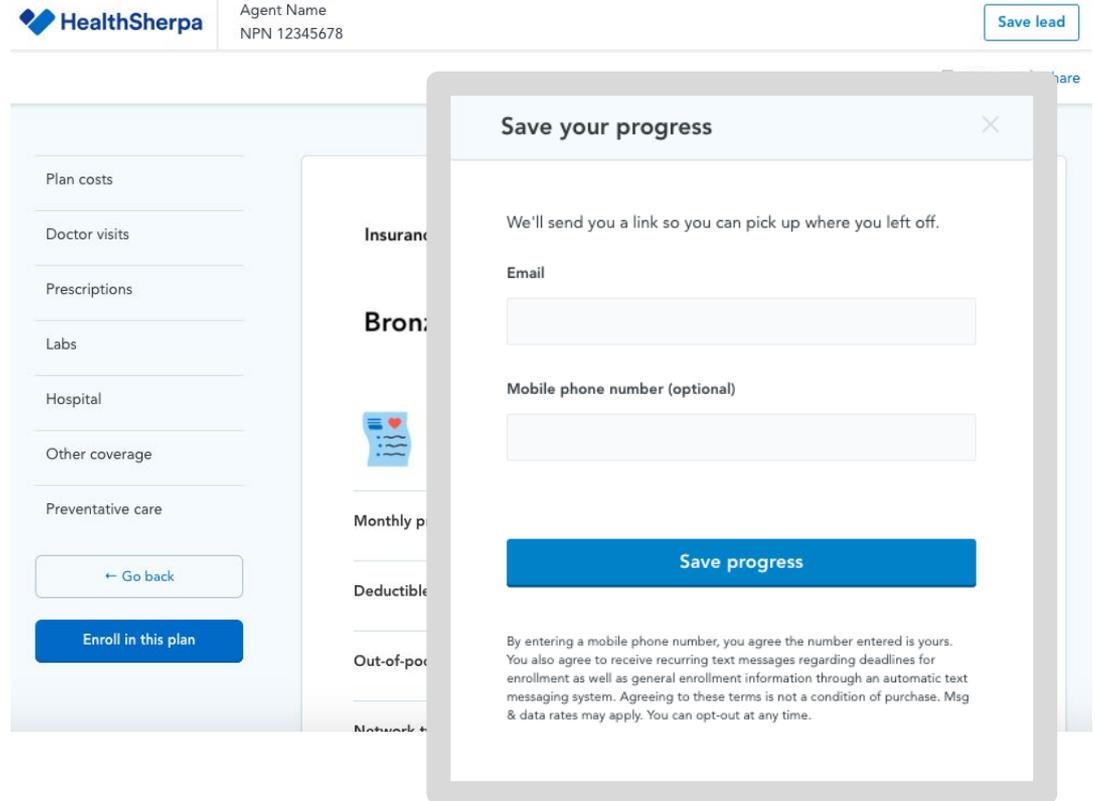
Client Self Enrollment

- Save Progress

Additional Information

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

This also creates a lead in the Carrier lead dashboard.



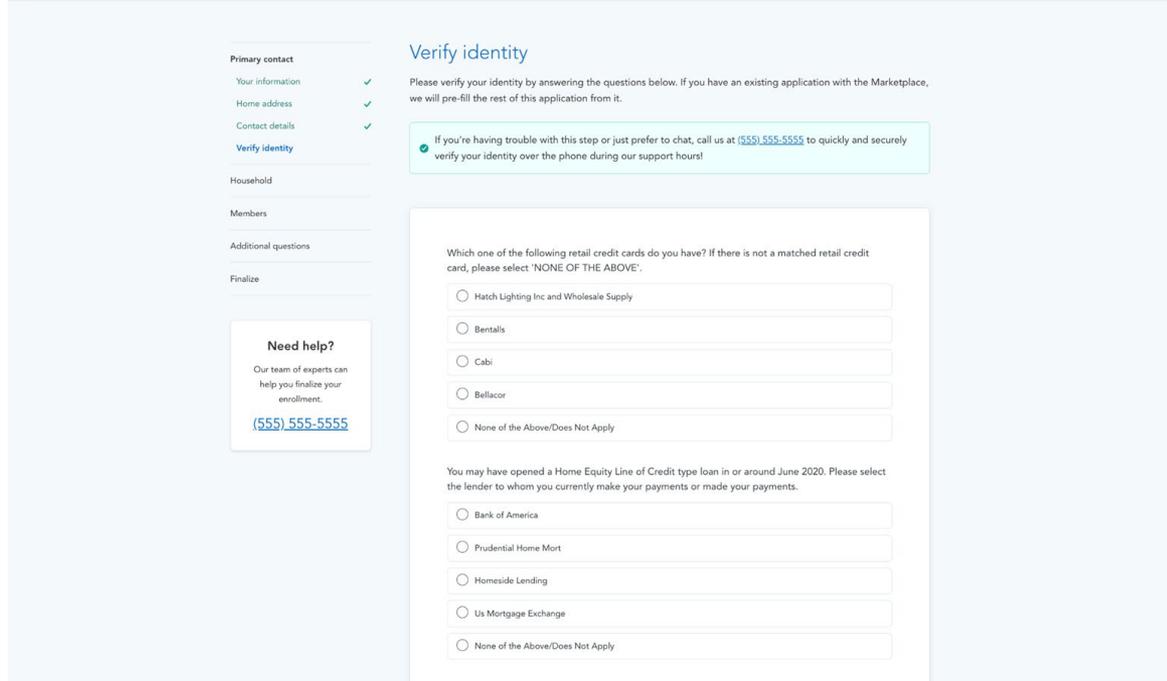
The screenshot displays the HealthSherpa client self-enrollment interface. At the top, the HealthSherpa logo is on the left, and the agent information 'Agent Name NPN 12345678' is on the right, with a 'Save lead' button. The main content area is partially obscured by a modal dialog titled 'Save your progress'. The modal contains the following elements:

- A message: 'We'll send you a link so you can pick up where you left off.'
- An 'Email' field with a text input box.
- A 'Mobile phone number (optional)' field with a text input box.
- A prominent blue 'Save progress' button.
- A disclaimer at the bottom: '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.'

In the background, the enrollment form is visible, showing a sidebar with categories like 'Plan costs', 'Doctor visits', 'Prescriptions', 'Labs', 'Hospital', 'Other coverage', and 'Preventative care'. The main form area includes fields for 'Insurance', 'Bronchodilator', 'Monthly premium', 'Deductible', 'Out-of-pocket', and 'Network type'. A 'Go back' button and an 'Enroll in this plan' button are also visible on the main form.

Consumer Identity Proofing

- Consumers will have to complete ID proofing questions
- Same process is used for healthcare.gov
- Consumers can call the carrier for questions or support



The screenshot shows a web interface for identity proofing. On the left is a progress sidebar with the following items: Primary contact (checked), Your information (checked), Home address (checked), Contact details (checked), Verify identity (active), Household, Members, Additional questions, and Finalize. Below the sidebar is a 'Need help?' box with the text: 'Our team of experts can help you finalize your enrollment. (555) 555-5555'. The main content area is titled 'Verify identity' and contains the instruction: 'Please verify your identity by answering the questions below. If you have an existing application with the Marketplace, we will pre-fill the rest of this application from it.' A light blue callout box states: 'If you're having trouble with this step or just prefer to chat, call us at (555) 555-5555 to quickly and securely verify your identity over the phone during our support hours!'. The first question is: 'Which one of the following retail credit cards do you have? If there is not a matched retail credit card, please select "NONE OF THE ABOVE".' It has five radio button options: 'Hatch Lighting Inc and Wholesale Supply', 'Bentalls', 'Cabi', 'Bellacor', and 'None of the Above/Does Not Apply'. The second question is: 'You may have opened a Home Equity Line of Credit type loan in or around June 2020. Please select the lender to whom you currently make your payments or made your payments.' It has five radio button options: 'Bank of America', 'Prudential Home Mort', 'Homeside Lending', 'Us Mortgage Exchange', and 'None of the Above/Does Not Apply'.

EDE Application experience is the same for brokers and consumers, see slides 23-38.

Consumer Dashboard

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


Español Demo Test 

+
Coverage

Coverage

Follow-ups

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

Item	Member	Status	Deadline	Action
Verify loss of coverage	Demo Test	● Action Needed	3/24/2022	Verify
Verify income	Demo Test	● Action Needed	5/23/2022	Verify
Verify citizenship	Demo Test	● Action Needed	5/28/2022	Verify

Submit followup documents

Demo Test by 5/23/2022.
Acceptable document types are images (jpg, gif, png, etc.) and PDFs.

Select document type ▼

Select file

Upload

Upload history

Check back here for the updates on your uploaded documents.

Document	Type	Submitted	Deadline	Status
screen_shot_2022-10... Show more	1040 tax return	10/10/2022 <small>4:18 PM</small>	5/23/2022	Processing



Agent 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.



 Test Agent
NPN: 17169718

Account settings

Login

To change your password, please enter your current password.

EMAIL ADDRESS

CURRENT PASSWORD

NEW PASSWORD

CONFIRM NEW PASSWORD

Two factor authentication ● Disabled

FFM Account

These will be transmitted on the eligibility and insurer applications.

FIRST NAME

LAST NAME

NPN

FFM USERNAME

Your FFM Username is the same login you use when logging into portal.cms.gov.



HealthSherpa Resources

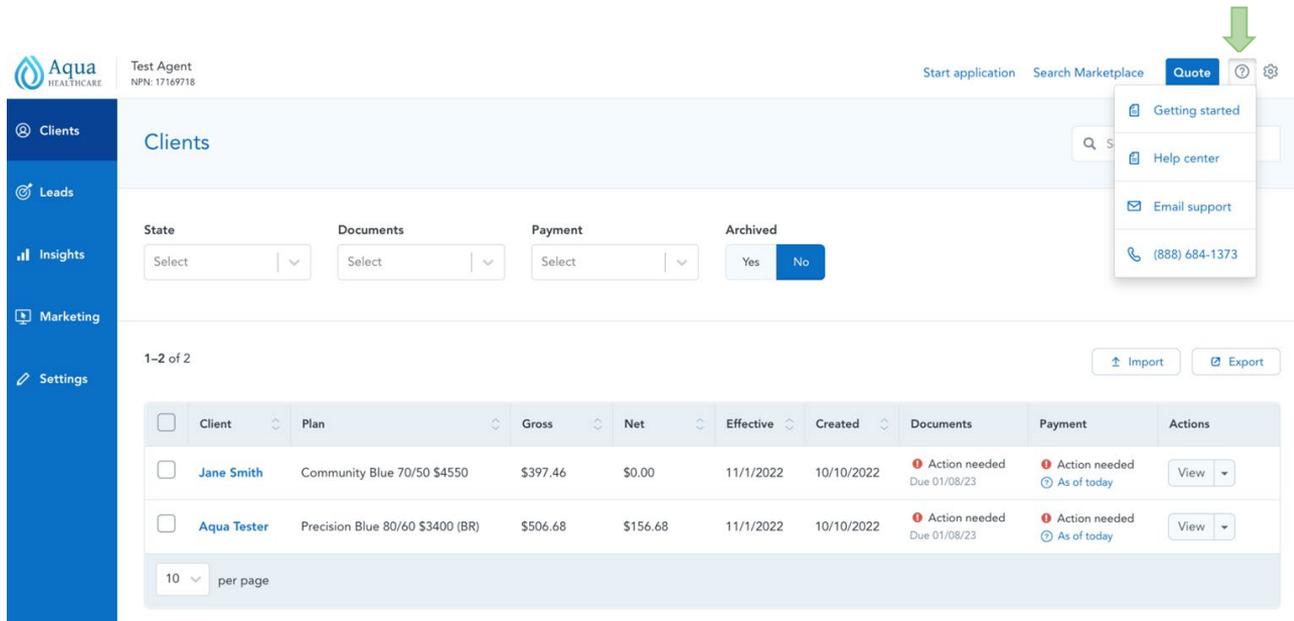
Resources

[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!

[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!



Aqua HEALTHCARE Test Agent
NPN: 17169718

Start application Search Marketplace **Quote** ?

Getting started
Help center
Email support
(888) 684-1373

Clients

State: Select Documents: Select Payment: Select Archived: Yes No

1-2 of 2 Import Export

<input type="checkbox"/>	Client	Plan	Gross	Net	Effective	Created	Documents	Payment	Actions
<input type="checkbox"/>	Jane Smith	Community Blue 70/50 \$4550	\$397.46	\$0.00	11/1/2022	10/10/2022	Action needed Due 01/08/23	Action needed As of today	View
<input type="checkbox"/>	Aqua Tester	Precision Blue 80/60 \$3400 (BR)	\$506.68	\$156.68	11/1/2022	10/10/2022	Action needed Due 01/08/23	Action needed As of today	View

10 per page



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
5AM - 5PM PST



(888) 684-1373

PHONE



agent_support@healthsherpa.com

EMAIL



Chat from dashboard

CHAT



Thank you!