



HealthSherpa UHC White Label Broker Platform Training

Overview

UHC ACA IFP Tools

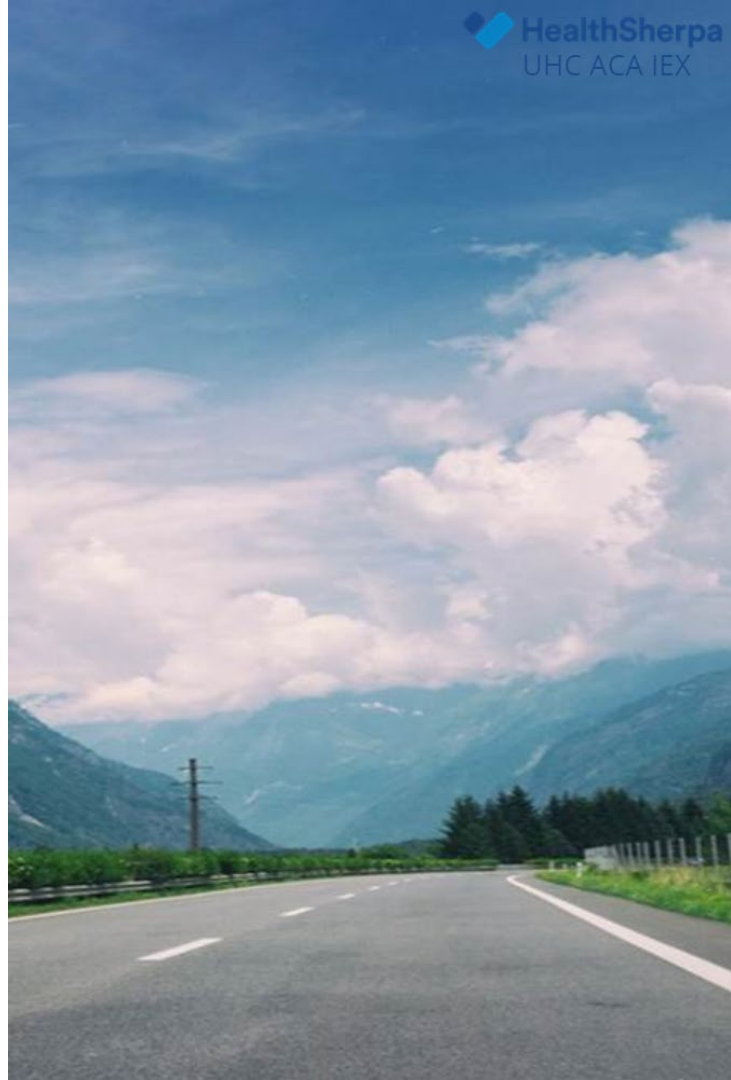
HealthSherpa is used to quote and enroll Customers in our UHC ACA plans.

UHC ACA Plans

Use HealthSherpa to view the UHC ACA plans, plan details, costs, benefits as well as search doctors/hospitals and prescriptions

Enhanced Direct Enrollment (EDE)

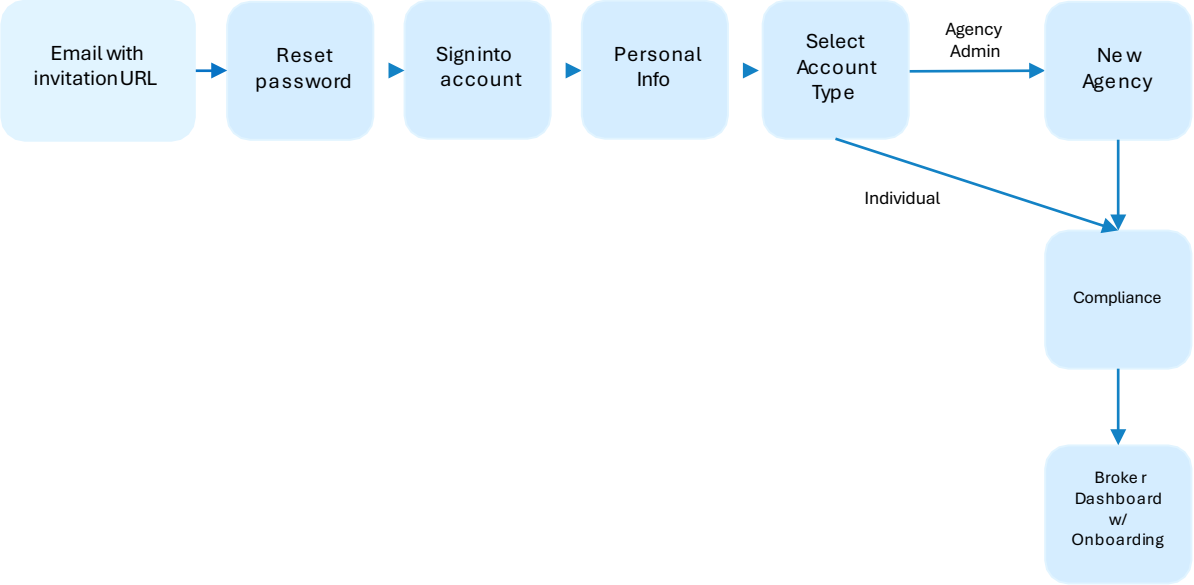
EDE is a technology that allows HealthSherpa (and others) to connect to HealthCare.gov efficiently with less interaction/questions.





Broker Onboarding

Onboarding Process:



Email with invitation URL:

- HealthSherpa can send an email invitation to each broker
 - A unique link is provided for the broker to set up their account on the white-label platform
 - This unique link can also be provided to the carrier to setup
- The text of the email is customizable but at this time , we do not support complex graphics or formats

Reset password:

Reset Password

Enter your new password to finish the password reset process.

EMAIL ADDRESS

PASSWORD

PASSWORD CONFIRMATION

Set Password



United
Healthcare

Espeñ

(844) 437-2482

Sign into your account

EMAIL ADDRESS

PASSWORD

Sign in

[Forgot your password?](#)

[Privacy Notice and Terms & Conditions](#)

Attention: This website is operated by UnitedHealthcare and its affiliates. This website does not display all Qualified Health Plans available through [StateCares.org](#). To see all available Qualified Health Plan options, go to the Health Insurance Marketplace website.



HealthSherpa

Sign into your account

EMAIL ADDRESS

PASSWORD

Sign in

Forgot your password?

Privacy Notice and Terms & Conditions

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[Statement of non-discrimination](#)

[Do not sell my personal information](#)

LICENSURE

ALC

KRCLN

FRANCIS

SAATCHI

VITAL

TRIP

CHEMIST

ELITE

ELITE

FOCUS

PORTUGAL

FYDOSH

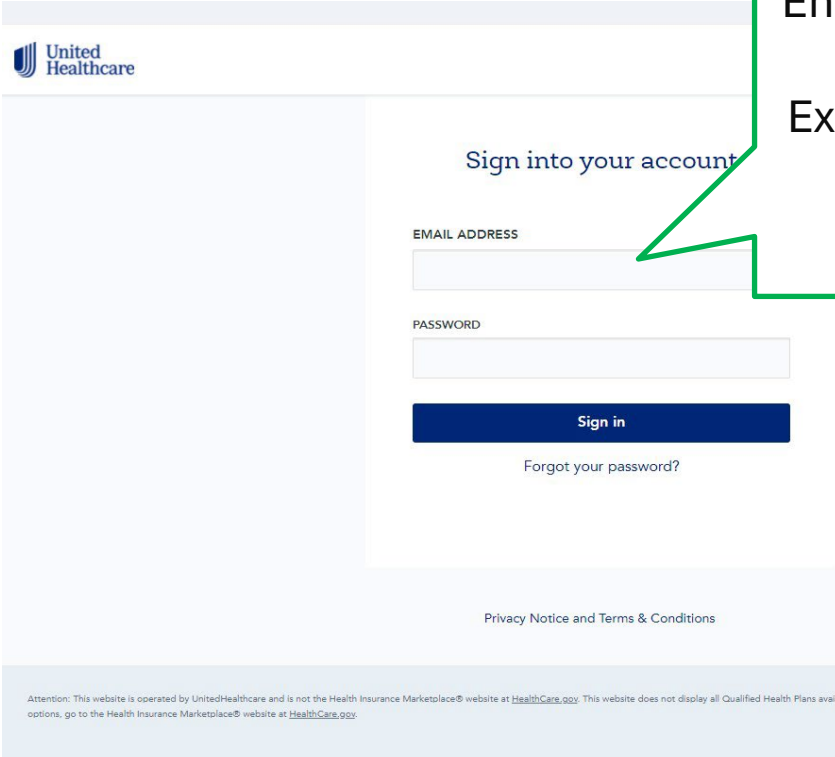
EMERALD

TAMARCO

THINKJET

<https://shop.uhcexchange.com/sessions/new>

Sign into UHC whitelabel platform:



The image shows a screenshot of the United Healthcare sign-in page. At the top left is the United Healthcare logo. The main heading is "Sign into your account". Below this are two input fields: "EMAIL ADDRESS" and "PASSWORD". A green callout box with a pointer directed at the email address field contains the following text: "Enter your work email address with **+uhc**
Ex: Firstname.lastname+uhc@uhc.com
This will be your login". Below the input fields is a dark blue "Sign in" button. Underneath the button is a link that says "Forgot your password?". At the bottom of the sign-in area is a link for "Privacy Notice and Terms & Conditions". At the very bottom of the page is a small disclaimer: "Attention: This website is operated by UnitedHealthcare and is not the Health Insurance Marketplace® website at [HealthCare.gov](https://www.healthcare.gov). This website does not display all Qualified Health Plans available through [HealthCare.gov](https://www.healthcare.gov). To see all available Qualified Health Plan options, go to the Health Insurance Marketplace® website at [HealthCare.gov](https://www.healthcare.gov)."

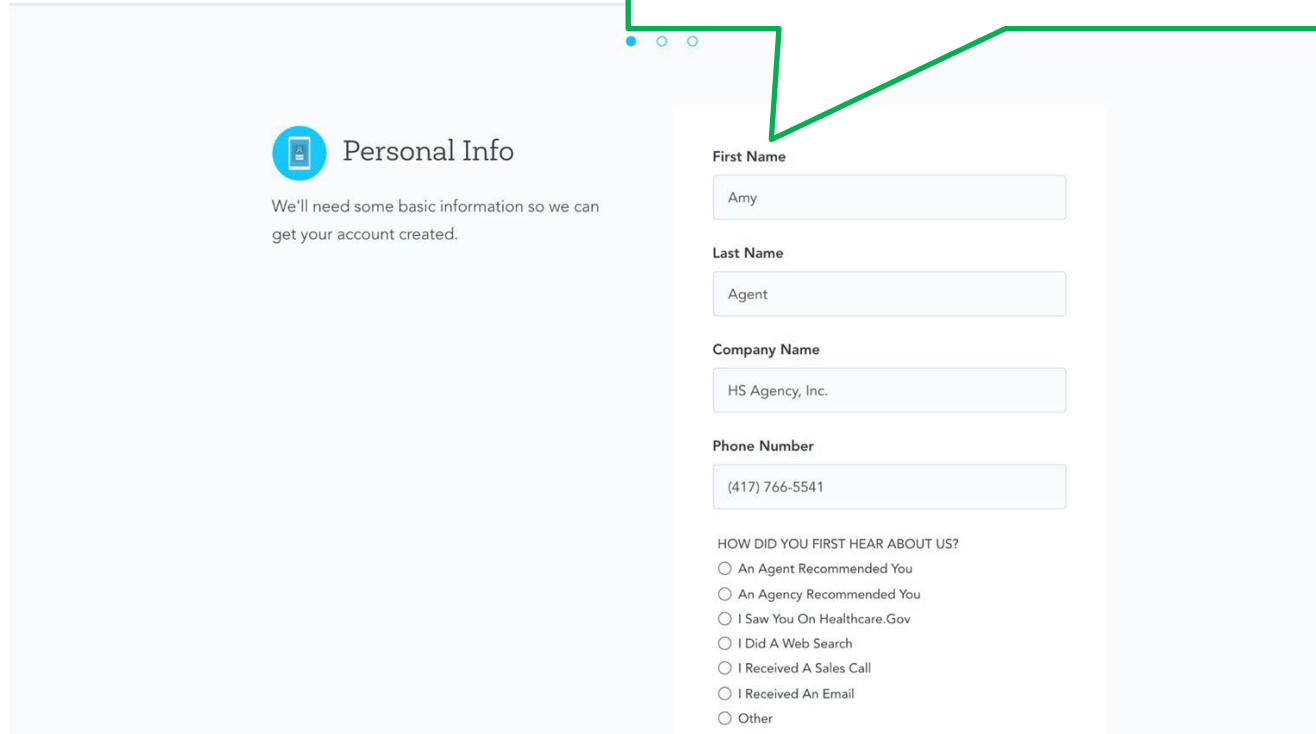
Enter your work email address with **+uhc**

Ex: Firstname.lastname+uhc@uhc.com

This will be your login

Personal info:

Personal information should be pre-filled,
correct as needed then continue



The screenshot shows a web form titled 'Personal Info' with a blue icon of a document. Below the title is a message: 'We'll need some basic information so we can get your account created.' The form contains four text input fields, each with a label above it: 'First Name' (pre-filled with 'Amy'), 'Last Name' (pre-filled with 'Agent'), 'Company Name' (pre-filled with 'HS Agency, Inc.'), and 'Phone Number' (pre-filled with '(417) 766-5541'). Below these fields is a section titled 'HOW DID YOU FIRST HEAR ABOUT US?' with seven radio button options: 'An Agent Recommended You', 'An Agency Recommended You', 'I Saw You On Healthcare.Gov', 'I Did A Web Search', 'I Received A Sales Call', 'I Received An Email', and 'Other'. A green callout box with a pointer to the form contains the text: 'Personal information should be pre-filled, correct as needed then continue'.

Personal Info

We'll need some basic information so we can get your account created.

First Name

Amy

Last Name

Agent

Company Name

HS Agency, Inc.

Phone Number

(417) 766-5541

HOW DID YOU FIRST HEAR ABOUT US?

- ☐ An Agent Recommended You
- ☐ An Agency Recommended You
- ☐ I Saw You On Healthcare.Gov
- ☐ I Did A Web Search
- ☐ I Received A Sales Call
- ☐ I Received An Email
- ☐ Other

Account type:

 Agency

Select the account type that applies to you.
You can always change this later in Settings.

Please select the scenario that applies to you

☐ Create a solo agent account

☐ Create a new agency account
Choose this if you're the agency owner or admin.

☐ Join an existing agency
A join code is required.

Back

Continue

New agency:



Agency

By creating an agency account, you are designated as the Agency Admin on the account. Other agents will be able to join the agency and you'll be able to view everyone who has joined. The agents that join will only see that they are members of this Agency.

The agency admin cannot be changed once the agency is created.

Agency Name

HS Agency, Inc.

Agency Phone

(215) 834-7239

Back

Continue

Note: this page is only surfaced to those that select account type = new agency account

Compliance:



Compliance

This information is needed in order to verify compliance and to make sure the carrier sees you on enrollments from the exchange.

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

FFM Username ([Forgot username?](#))

NPN ([Forgot npn?](#))

Note: For Agents only using the off-exchange functionality, simply put “N/A” in the “FFM Username” field.

Enable EDE:

To access full EDE functionality, click the
Enable EDE button

United Healthcare

Agent Name
NPN: 1111111

Enable EDE

Quota

You're viewing Agent Name's account. [Go back to your account](#)

Welcome to HealthSherpa! The easier, faster alternative to Healthcare.gov — designed specifically for agents & brokers.

Clients

Search

Take us for a spin! [Import](#)

This is an example Client — click their name to see their Client Details page.

	Plan	Premium	Effective	Created	Documents	Payment	Actions
☐ 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

Resources

- [Read the Getting Started Guide](#)
- [Enable full Marketplace sync \(EDE\)](#)
- [Set up your client-facing enrollment site](#)
- [Join an upcoming Webinar](#)

Frequently asked questions

What's your relationship to Healthcare.gov?
We're an official Healthcare.gov partner, with full integration. Updates made here will sync to Healthcare.gov, and updates made there will appear here.

If you have any other questions
Call us at (888) 684-1372, send us a [chat](#), or email agents@healthsherpa.com

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

United Healthcare HealthPlan

Carrier Name Test
NPN: 127168718

Start application Search Marketplace Quote

Clients

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

4 clients Renewal email Export Import View import history

	Client	Plan	Gross premium	Net premium	Effective	Created	Documents	Payment	Actions
☐	Dwayne Curtis Email	Value Bronze 3 Free Telehealth Visits	\$346.24	\$117.24	7/1/2021	6/8/2021	Action needed As of today	Action needed As of today	View
☐	Tom Brady Email	Balance Silver 3 Free Visits	\$478.47	\$287.47	3/1/2021	2/8/2021	Action needed As of 6/8/2021	Action needed As of 6/8/2021	View
☐	Bugs Bunny	Balance Plus Silver 3 Free	\$476.14	\$246.14	2/1/2021	2/8/2021	Action needed	Action needed	View

Privacy - Terms

Sync application with CMS:

On the client view of the application, the button at the top:

- Indicates when the client's application was last synced with CMS
- Will sync it with CMS upon clicking

The screenshot displays the United Healthcare client application interface. At the top, the header includes the United Healthcare logo, the text "Carrier Name Test" and "NPN: 17169718", and navigation links for "Start application", "Search Marketplace", and a "Quote" button. A sidebar on the left contains icons and labels for "Clients", "Leads", "Insights", "Marketing", and "Settings". The main content area is titled "Dwayne Curtis". In the top right of this section, a button labeled "EDE synced a few seconds ago" is highlighted with a red rectangle. To its right is a "Report changes" button. Below this, a section titled "Your follow-ups" contains a table with three rows of follow-up items, each with a "Verify" button.

Item	Member	Status	Deadline	Action
Verify loss of coverage	Dwayne Curtis	❗ Action Needed	8/7/2021	<button>Verify</button>
Verify income	Dwayne Curtis	❗ Action Needed	10/6/2021	<button>Verify</button>
Verify citizenship	Dwayne Curtis	❗ Action Needed	10/11/2021	<button>Verify</button>

At the bottom of the interface, a "Client" section includes "View application" and "Report changes" buttons.

Frequently Asked Questions:

- **What scenario applies to me (create solo agent, create a new agency account, join an existing agency)?**
 - If you are not part of a larger agency, select “Create soloagent”
 - If you are an administrator at an agency and would like to have special features and functionality, like shared access to leads and clients and special privileges for administrators, then you should select “Create a new agency.”
 - If you are part of an agency, consult with your agency as an agency account may have been setup.
 - If it has, then a join code will be provided, and you should select “Join an existing agency”.
 - If you are unsure, then select “Create solo agent”. You can always add your agency join code at a later date.

Frequently Asked Questions:

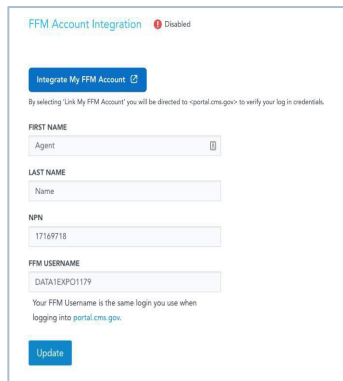
- **Do I need to include my agency?**
 - No, this is optional even if you are part of an agency. In the future, this will be required if agents would like to leverage the shared book functionality.
- **Do I need to include a company name?**
 - No, this can be left blank. Include this field only if the agent elects to use a name other than their first and last name.
- **What do I do if I forgot my FFM username or NPN?**
 - Select the forgot my FFM or forgot NPN prompt and follow the steps provided.



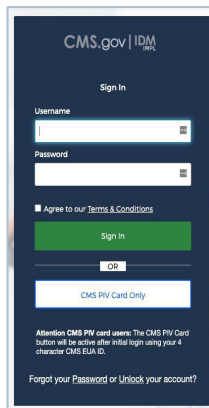
PY2026 Broker Security

CMS Agent authentication:

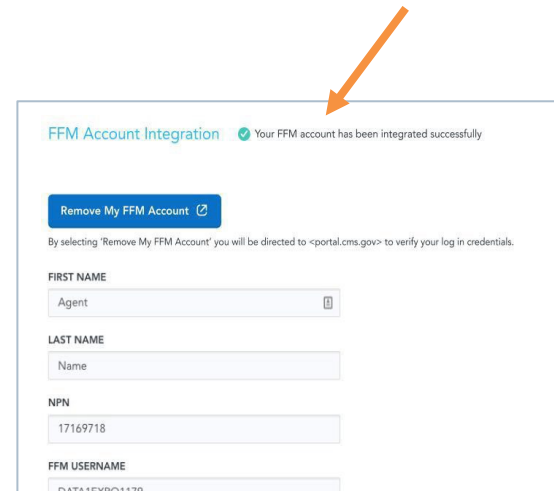
- CMS issued a change request (CR-55) requiring all EDE partners to implement Agent/Broker (A/B) user authentication through CMS IDM-Okta via the EDE Pathways



1. If you haven't already, agent accounts need to be integrated with their FFM account. Agents will be prompted to integrate their accounts when they log in to HealthSherpa.



2. When the agent clicks the "Integrate My FFM Account" button, it will open a new window that asks the agent to login into CMS.gov.



3. Once the account is integrated, the agent will see a green check mark noting their successful account integration upon logging in to HealthSherpa.

Note: Sessions will last 12 hours, before agents will need to reintegrate (CMS requirement)

Methods in which identity can be verified:

Consumers and agents can often choose from several methods when verifying their identity.

These methods include:

1. **Experian** - CMS' identity verification partner. Experian uses various data points like typical behavior, device, and transaction risk signals (i.e. risk-based authentication) to automatically authenticate a users identity.
2. **Upload ID documents (Persona)** - Persona is an identity verification platform that confirms someone's identity by checking government-issued documents (like driver's licenses or passports) and matching them with live signals such as selfies, phone numbers, or device data. When users opt to verify their identity by uploading ID documents, here is the flow they can expect. Note: Image below is an example and may vary depending on flow and user.
3. **ID.me** - ID.me uses multi-factor verification including government-issued ID document upload and biometric checks (like selfies) to authenticate a users identity. Once authenticated, the user can leverage their single ID.me account across multiple sites without having to verify their identity again. When users opt to verify their identity using ID.me, here is the flow they can expect.

Choose how to verify your identity:

☒ Verify identity with Experian.

☐ Upload ID documents with ID.me

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

or

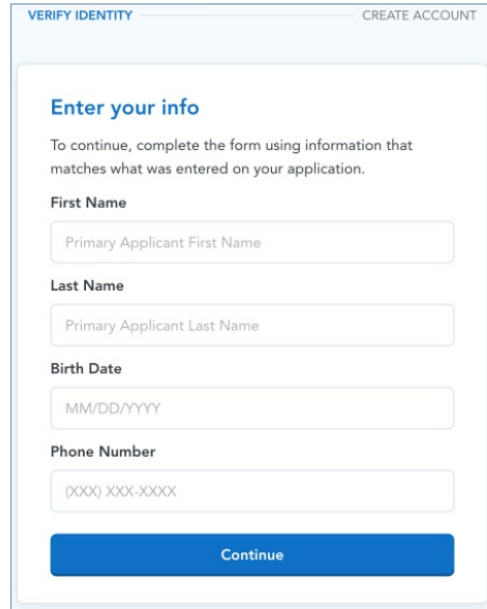
[Sign in with email](#) | [Read FAQ](#) | [Watch Tutorial](#)

Healthcare.gov Partner

Additional HealthSherpa security info can be found [here](#).

Experian:

Experian is CMS' identity verification partner. Experian uses various data points like typical behavior, device, and transaction risk signals (i.e. risk-based authentication) to automatically authenticate a users identity.



The image shows a web form for identity verification. At the top, there are two tabs: "VERIFY IDENTITY" (selected) and "CREATE ACCOUNT". Below the tabs, the heading "Enter your info" is displayed in blue. A sub-heading in grey text reads: "To continue, complete the form using information that matches what was entered on your application." The form contains four input fields, each with a label above it: "First Name" (placeholder: "Primary Applicant First Name"), "Last Name" (placeholder: "Primary Applicant Last Name"), "Birth Date" (placeholder: "MM/DD/YYYY"), and "Phone Number" (placeholder: "(XXX) XXX-XXXX"). At the bottom of the form is a blue button labeled "Continue".

Step one

First, the user will enter their personal information.

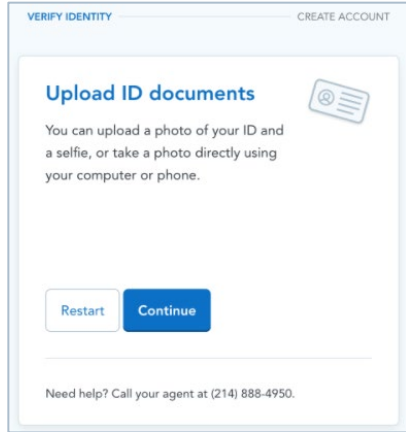
Note: Image is an example and may vary depending on flow and user.

Step two

The users identity will be automatically verified and they will be returned to the HealthSherpa platform.

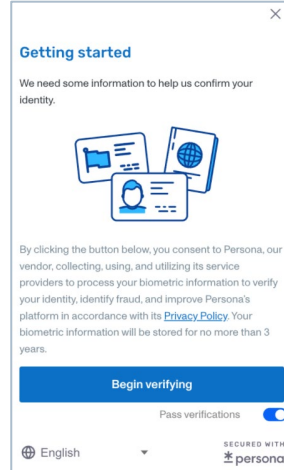
Upload ID documents (Persona):

Persona is an identity verification platform that confirms someone's identity by checking government-issued documents (like driver's licenses or passports) and matching them with live signals such as selfies, phone numbers, or device data. When users opt to verify their identity by uploading ID documents, here is the flow they can expect. Note: Image below is an example and may vary depending on flow and user.



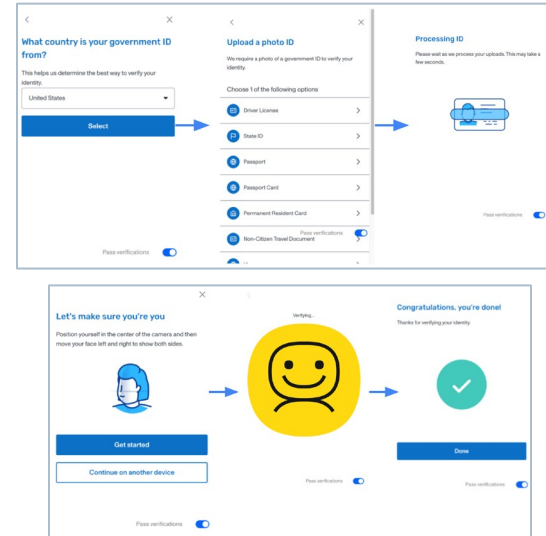
Step one

First, using a secure partnership with Persona, users will begin the verification process.



Step two

Next, users will select their desired photo ID and upload the documentation for processing.



Step three

Lastly, users will take a selfie on their device. After successfully completing identity verification, the user will be returned to the HealthSherpa platform.

ID.me (Part 1):

ID.me uses multi-factor verification including government-issued ID document upload and biometric checks (like selfies) to authenticate a users identity. Once authenticated, the user can leverage their single ID.me account across multiple sites without having to verify their identity again. When users opt to verify their identity using ID.me, here is the flow they can expect.

Step one

First, users will decide whether they'd like to create an ID.me account or log in using an existing ID.me account.

- When creating a new ID.me account, the user will be prompted to enter an email and password to begin. Next, the user will set up multi-factor authentication (MFA) for ID.me. Once MFA has successfully been established for ID.me, the user will receive a confirmation message.
- After selecting the method in which they'd like to log into their existing ID.me account, users will be prompted to connect their ID.me account with HealthSherpa.

The first screenshot shows the 'Create an ID.me account' page. It has a heading 'Create an ID.me account' and a subheading 'Multiple ID.me accounts are not allowed. Existing accounts must be verified. Need to use ID.me for work? ID.me for work'. There are fields for 'Email' and 'Password' (with a 'Show password' toggle). Below these are checkboxes for 'Remember me' and 'I agree to the ID.me Terms of Service and Privacy Policy'. A 'Create account' button is at the bottom.

The second screenshot shows the 'Set up multi-factor authentication (MFA)' page. It has a heading 'Set up multi-factor authentication (MFA)' and a subheading 'Secure your account by enabling an MFA method. Recommended: Authenticator app'. There are several options: 'Authenticator app' (recommended), 'SMS text messages', 'Voice call', 'Email', 'Security key', and 'Hardware security key'. A 'Continue' button is at the bottom.

The third screenshot shows the 'YOUR ACCOUNT IS NOW SECURE' page. It has a heading 'YOUR ACCOUNT IS NOW SECURE' and a subheading 'Your phone number can now be used for multi-factor authentication'. It shows a 'Recovery code' and a 'Generate recovery code' button. A 'Continue' button is at the bottom.

The screenshot shows the 'CONNECT YOUR ACCOUNT' page. It has a heading 'CONNECT YOUR ACCOUNT' and a subheading 'To connect your Google account to your ID.me account, enter the email address that you use to sign in to ID.me. If this is your first time signing in to ID.me, enter the email address you'd like associated with your account. You'll only need to connect your account once.' There is a field for 'Email' with the placeholder text 'Enter your personal email address'. Below this is a checkbox for 'I accept the ID.me Terms of Service and Privacy Policy'. A 'Continue' button is at the bottom. At the very bottom, there is a link that says 'Cancel. I don't want to use my Google login'.

ID.me (Part 2):

Step two

Next, users will select a verification method and provide ID.me with consent.

ID.me +

VERIFY YOUR IDENTITY

We'll need permission to use details from your credit profile and other public sources to verify your identity. This will not affect your credit score.

Choose a verification method

Upload photos of your license or state ID
Upload photos of your driver's license or state ID, and enter your Social Security number.

Upload a photo of your passport
Upload a photo of your passport and enter your Social Security number.

Upload photos of your passport card
Upload photos of your passport card and enter your Social Security number.

Consent for ID.me to collect Biometric Data and Sensitive Personal Information

CONSENT FOR ID.ME TO COLLECT BIOMETRIC INFORMATION AND SENSITIVE PERSONAL INFORMATION

In the event of any discrepancy between a non-English version of this document and the English version of this document, the English version shall prevail in all respects.

BIOMETRIC INFORMATION PRIVACY STATEMENT

ID.me will not sell, rent, or trade your Biometric Information, and after verification you may request we delete your Biometric Information. Your Biometric Information will only be used by ID.me to verify your identity in accordance with the guidelines published by the National Institute for Standards and Technology or as required for the prevention of fraud. ID.me will transfer your Biometric Information to our third party partners only when required by a subpoena, warrant, or other court ordered legal action.

Notice and Consent

This Notice and Consent for the collection of Biometric Information, Personal Information and Sensitive Personal Information ("Consent") describes how ID.me

☐ I acknowledge that I have received, read, and agreed to these terms

Continue

Cancel

Step three

After successfully completing identity verification on ID.me, users will be prompted to allow ID.me to share your verified information with HealthSherpa before returning to the HealthSherpa platform.

ID.me +

AUTHORIZE HEALTHSHERPA

Before we send you back to HealthSherpa, we need your permission to share your verified identity information.

Please note that only information obtained from the verification process will be shared.

HealthSherpa will receive:

☒ First Name	☒ Last Name
☒ Phone	☒ SSN
☒ Birth Date	☒ Email
☒ Addresses	

You can remove this access at any time by changing your ID.me account settings.

Allow

Deny

You are now returning to HealthSherpa

[What is ID.me?](#) | [Terms of Service](#) | [Privacy Policy](#)



Broker Dashboard Overview

Start Application:

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



Carrier Name Test
NPN: 17169718

Start applicationSearch MarketplaceQuote?⚙️

👤 Clients

🎯 Leads

📊 Insights

📧 Marketing

⚙️ Settings

Clients

🔍 Search

Carrier

State

Documents

Payment

Archived

Renewal needed

Select

Select

Select

Select

YesNo

YesNo

4 clients

Renewal email

ExportImportView import history

☐	Client	Plan	Gross premium	Net premium	Effective	Created	Documents	Payment	Actions
☐	Dwayne Curtis Email	Value Bronze 3 Free Telehealth Visits	\$346.24	\$117.24	7/1/2021	6/8/2021	🔴 Action needed 🕒 As of today	🔴 Action needed 🕒 As of today	View
☐	Tom Brady Email	Balance Silver 3 Free Visits	\$478.47	\$287.47	3/1/2021	2/8/2021	🔴 Action needed 🕒 As of 6/8/2021	🔴 Action needed 🕒 As of 6/8/2021	View
☐	Bugs Bunny	Balance Plus Silver 3 Free	\$476.14	\$246.14	2/1/2021	2/8/2021	🔴 Action needed	🔴 Action needed	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.

Note: Adding the client to your book of business or clients tab does not automatically make you the AOR. If you are making updates to an existing member who you are not currently AOR for, you will need to have consent from the member and conduct a 3-way call with the member and hc.gov to update the application and become AOR.

Search for an application

Retrieve existing Marketplace applications and add them to your account.

First name

Last name

Date of birth

Coverage state ⓘ

☐

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	Address	Application	
mickey mouse DOB: 1980-01-01	1234 TEST STREE PHOENIX, AZ 85001	2020	ID: 12901170

Add to clients



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

ClientsTab:

- 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.

 Carrier Name Test
NPN: 17169718

Start application Search Marketplace Quote ? ⚙️

🔍 Clients

🎯 Leads

📊 Insights

📺 Marketing

⚙️ Settings

Clients

🔍 Search

Carrier State Documents Payment Archived Renewal needed

Select Select Select Select Yes No Yes No

4 clients Renewal email Export Import [View import history](#)

☐	Client	Plan	Gross premium	Net premium	Effective	Created	Documents	Payment	Actions
☐	Dwayne Curtis Email	Value Bronze 3 Free Telehealth Visits	\$346.24	\$117.24	7/1/2021	6/8/2021	🔴 Action needed 🔍 As of today	🔴 Action needed 🔍 As of today	View
☐	Tom Brady Email	Balance Silver 3 Free Visits	\$478.47	\$287.47	3/1/2021	2/8/2021	🔴 Action needed 🔄 As of 6/8/2021	🔴 Action needed 🔄 As of 6/8/2021	View
☐	Bugs Bunny	Balance Plus Silver 3 Free	\$476.14	\$246.14	2/1/2021	2/8/2021	🔴 Action needed	🔴 Action needed	View

 Privacy - Terms

Filtering Submitted Applications:

United Healthcare

Test Agent

NPN: 000000

Start application

Search Marketplace

Quote

?

⚙

👤 Clients

📈 Leads

📊 Insights

📧 Marketing

⚙ Settings

Clients

Carrier

Select

UnitedHealthcare

State

Select

Alabama

Alaska

American Samoa

Arizona

Arkansas

California

Colorado

Connecticut

Documents

Select

Action needed

Insufficient documentation

Processing

Expired

Completed

Payment

Select

Action Needed

Effectuated

Canceled app

Terminated app

Archived

Yes

No

1-1 of 1

Client

Plan

Test Test

Value Bronze 3 Fre

Documents

Payment

Actions

Import

Export

View

Report changes

Access

Archive

Email

Client	Plan	Documents	Payment	Actions
Test Test	Value Bronze 3 Fre	\$368.91	\$114.91	9/1/20219/28/2021Expired

Action needed

As of 09/29/21

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

The screenshot displays the United Healthcare Exchange Plans client portal. At the top, the United Healthcare logo and 'Exchange Plans' text are on the left, and 'Carrier Name Test' and 'NPN: 17169718' are on the right. Navigation links include 'Start application', 'Search Marketplace', and a blue 'Quote' button. A dark blue sidebar on the left contains icons and labels for 'Clients', 'Leads', 'Insights', 'Marketing', and 'Settings'. The main content area for 'Dwayne Curtis' features three action buttons: 'EDE synced a few seconds ago', 'Report changes', and 'Change plans'. Below this is a 'Your follow-ups' section with a message: 'There are just a few more steps to ensure you are covered.' It contains a table with one row: 'Verify loss of coverage' for member 'Dwayne Curtis', with status 'Action Needed' (indicated by a red icon), a deadline of '7/8/2021', and a 'Verify' button. At the bottom is a 'Client' section with 'View application' and 'Report changes' buttons, followed by a table with client details.

Item	Member	Status	Deadline	Action
Verify loss of coverage	Dwayne Curtis	Action Needed	7/8/2021	Verify

Applicant	Gender	Tobacco	Date of birth	SSN	Eligibility
Dwayne Curtis	Male	No	3/17/1986	***-**-1410	Subsidy

Client Details Continued:

- Broker of record visibility
- Eligibility letters and 1095As
- Marketplace notices
- Much more!

Coverage 2021

Health plan

[Value Bronze 3 Free Telehealth Visits - HMO](#)
[UnitedHealthcare](#)

● EXPANDED BRONZE

\$117.24	\$6,500	\$8,550
Premium	Deductible	Out of pocket max
Was \$346.24		

[View plan details](#)

Status ⓘ Pending followups

Members Dwayne Curtis

Subscriber ID 0000528320

FFM ID 15950546

Effective: 7/1/2021

Documents [Summary of benefits](#)

Change planCancel plan

Marketplace notices

Date	Subject	Plan Year	Documents
6/8/2021	Eligibility determination results		📄 Notice
6/8/2021	Important! – Follow-ups are required – act now to secure your coverage.		📄 Notice
6/8/2021	Eligibility determination results		📄 Notice
6/8/2021	Eligibility determination results		📄 Notice

Confirming AOR:

- Client detail page under “Status”
 - Agent of record is listed

 Test Agent
NPN: 999999

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

[Clients](#)
[Leads](#)
[Insights](#)
[Marketing](#)
[Settings](#)

Sara Smith [Renew plan](#)

Application

Applicant	Gender	Tobacco	Date of birth	SSN	Eligibility
Sara Smith	Female	No	6/18/2012	-	Subsidy
Emily Smith	Female	No	6/11/1989	-	Not Applying

Contact:

Email: test@example.com
Phone: (333) 123-1234
Address: 123 main st, maricopa, AZ, 85050

Status

Status: Enrolled
Last update: 10/20/2021
Agent of record: NPN 999999

Plans 2021 [Renew](#)

Health plan

Value Bronze 3 Free Telehealth Visits - HMO

UnitedHealthcare

EXPANDED BRONZE

\$216.75	\$6,500	\$8,550
Premium	Deductible	Out of pocket max

[View plan details](#)

Status ⓘ Pending followups

Members Sara Smith

Subscriber ID 000052364

FFM ID 17526877

Effective: 11/1/2021

Documents [Summary of benefits](#)

[Cancel plan](#)

 Privacy Terms

Import Client Book of Business:

- Easily upload existing clients into the HealthSherpa Broker dashboard

United Healthcare Exchange Plans

Carrier Name Test
NPN: 17169718

Start application Search Marketplace Quote ?

Clients

Search

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

5 clients Renewal email Export Import View import history

Import your clients to HealthSherpa

Import your clients to HealthSherpa. These clients will show up on your clients' list. You'll then be able to process renewals, report changes, and more.

Step 1: Download the HealthSherpa client import template

[Download CSV template](#)

Step 2: Fill in all the required information per client. **The required headers are:** first_name, last_name, dob, street_address, city, state, zip_code, plan_name, effective_date, and gross_premium. A phone number or an email is also required. If you have the plan_hios_id please add it, this is the surest way for us to find the plan.

Tips:

1. Remove the sample client from the sheet before uploading.
2. After completing the template, **do not transmit using insecure methods (e.g. email, FTP).**
3. For Cost Sharing Reduction, CSR - please use the values: none, 73%, 87% or 94%.
4. Optional fields: FFM App ID, CSR Level, Plan HIOS, Subsidy, Issuer, County, & SSN

Step 3: Import the completed CSV file

[Click here to select file](#)

Import CSV

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

Leads

Search

Carrier

Select... ▾

State

Select... ▾

Status

Shopping

Applying

Confirming

Archived

Yes

No

Showing 1 - 6 of 6

[View import history](#)

Import

Export

Lead	Plan	Gross premium ▾	Net premium ▾	Last active ▾	Status	Actions
Test Test						
Email	Value Bronze 3 Free Visits	\$342.14	\$232.87	3/16/2021	Applying	Resume ▾
(303) 222-2222						

Lead

View application

Report changes

Applicant	Gender	Tobacco	Date of birth	SSN	Eligibility
Tom Cruise	Male	No	1/1/1990	-	Subsidy and 73% CSR

Contact

Email: test.email@email.com

Phone: (919) 123-1234

Address: 123 test street, raleigh, NC, 27513

Status

Status: Confirming

Last update: 1/29/2021

Current quote

Cost Sharing Reduction: -

Subsidy: -

Net premium: \$0.00

Resume shopping



Sale vs. Service

"Sale" versus "Service":

The "**Sale button**" allows agents to update a consumer's application and will assign them to be the agent of record (AOR)

The "**Service button**" allows agents to update a consumer's application without updating the agent of record (AOR)

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)	
John Smith SSN: ***-**-1111 DOB: 1985-11-14	2022202202 2022	Sale Service
123 EXAMPLE ST TAMPA, FL 33605	2011201102 2021	Sale Service

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

Note: Functionality limited to only internal telesales agents



Broker Quoting

Broker Quoting

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



Carrier Name Test
NPN: 17169718

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

 Clients

 Leads

 Insights

 Marketing

 Settings

Clients



Carrier

Select

State

Select

Documents

Select

Payment

Select

Archived

Yes

No

Renewal needed

Yes

No

4 clients [Renewal email](#)

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

☐	Client	Plan	Gross premium	Net premium	Effective	Created	Documents	Payment	Actions
☐	Dwayne Curtis Email	Value Bronze 3 Free Telehealth Visits	\$346.24	\$117.24	7/1/2021	6/8/2021	 Action needed  As of today	 Action needed  As of today	View
☐	Tom Brady Email	Balance Silver 3 Free Visits	\$478.47	\$287.47	3/1/2021	2/8/2021	 Action needed  As of 6/8/2021	 Action needed  As of 6/8/2021	View
☐	Bugs Bunny	Balance Plus Silver 3 Free	\$476.14	\$246.14	2/1/2021	2/8/2021	 Action needed	 Action needed	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

The screenshot shows a web form for United Healthcare Exchange Plans. At the top right, there are links for 'Español', a phone number '(801) 123-1234', and a 'Save lead' button. Below the header, there are links for 'Close', 'Send to client', and 'Print'. The form is divided into two main sections: 'Your details' and 'Eligibility'.

Your details

- Zip code:** A text input field containing '85001'.
- Household members:** A dropdown menu showing '1'.
- Who is applying for coverage?:** A section with two columns: 'Age' and 'Gender'.
 - Age:** A text input field containing '35'.
 - Gender:** Two buttons, 'M' (Male) and 'F' (Female), with 'F' selected.
 - Checkboxes:** A list of checkboxes with labels: 'Tobacco user', 'Parent of child under 19', 'Pregnant', 'Eligible for other coverage', and 'Has gotten or is approved to get unemployment income in 2021'. All are currently unchecked.
 - Buttons:** 'Delete' and 'Close' buttons at the bottom of the section.
- Household income:** A text input field with a dollar sign prefix, containing '25000'.
- Buttons:** 'Add spouse applicant' and 'Add dependent applicant' buttons at the bottom of the 'Your details' section.

Eligibility

- Savings:** A green box showing '\$335/mo'.
- Cost sharing reduction:** A yellow box with a 'CSR' icon.

Broker Quoting:

Quickly quote and search for Marketplace plans

Filters:

- Premium
- Deductible
- Provider
- Metal level
- Network

Monthly premium max
\$309

Max deductible
\$8,550

Providers
[Add a doctor or hospital](#)

Health Savings Account Eligibility (HSA)
☐ Eligible for an HSA

Metal levels
☐ Catastrophic
☐ Bronze
☐ Expanded Bronze
☐ Silver
☐ Gold

Networks
☐ HMO

7 plans

Lowest Premium ▾

UnitedHealthcare Value Bronze 3 Free Visits - HMO EXPANDED BRONZE

Premium	Deductible	Out-of-pocket max	
\$7 /mo ~~was \$342~~	\$7,500/yr	\$8,550	
		Doctor visits	50% after deductible
		Specialist visit	50% after deductible
		Generic drugs	\$20

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

UnitedHealthcare Value Bronze 3 Free Telehealth Visits - HMO EXPANDED BRONZE

Premium	Deductible	Out-of-pocket max	
\$11 /mo ~~was \$346~~	\$6,500/yr	\$8,550	
		Doctor visits	\$25
		Specialist visit	40% after deductible
		Generic drugs	\$20

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

UnitedHealthcare Value Bronze - HMO EXPANDED BRONZE

Premium	Deductible	Out-of-pocket max	
\$15 /mo ~~was \$350~~	\$7,000/yr	\$8,550	
		Doctor visits	\$25
		Specialist visit	35% after deductible
		Generic drugs	\$20

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

Broker Quoting:

Compare up to 5 plans side by side.

Additional features:

- Plan Comparison
- Email to client

Monthly premium max

\$309

Max deductible

\$8,550

Providers

Add a doctor or hospital

Health Savings Account Eligibility (HSA)

☐ Eligible for an HSA

Metal levels

☐ Catastrophic

7 plans

Lowest Premium ▾

UnitedHealthcare

Value Bronze 3 Free Visits - HMO

EXPANDED BRONZE

Premium	Deductible	Out-of-pocket max	
\$7 /mo ~~was \$342~~	\$7,500/yr	\$8,550	
		Doctor visits	50% after deductible
		Specialist visit	50% after deductible
		Generic drugs	\$20

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

UnitedHealthcare

Value Bronze 3 Free Telehealth Visits - HMO

EXPANDED BRONZE

Premium	Deductible	Out-of-pocket max	
\$11 /mo ~~was \$346~~	\$6,500/yr	\$8,550	
		Doctor visits	\$25
		Specialist visit	40% after deductible
		Generic drugs	\$20

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

V...
\$11

V...
\$7

V...
\$15

V...
\$107

V...
\$110

Compare 5 plans

< Back

Send to client

Print

Broker Quoting:

Compare plans side by side

Additional features:

- Compare plans
- Email to client

	UnitedHealthcare Value Bronze 3 Free Telehealth Visits Enroll	UnitedHealthcare Value Bronze 3 Free Visits Enroll	UnitedHealthcare Value Bronze Enroll	UnitedHealthcare Value Silver 3 Free Visits 2-D Enroll	UnitedHealthcare Value Plus Silver 3 Free Visits-D Enroll
Summary					
Monthly Premium	\$11 for household ~~was-\$246~~	\$7 for household ~~was-\$242~~	\$15 for household ~~was-\$359~~	\$107 for household ~~was-\$442~~	\$110 for household ~~was-\$445~~
Deductible	\$6,500 per person	\$7,500 per person	\$7,000 per person	\$1,000 per person	\$800 per person
Max OOP	\$8,550 per person	\$8,550 per person	\$8,550 per person	\$2,850 per person	\$2,850 per person
Estimated All-in					
Network	HMO	HMO	HMO	HMO	HMO
Primary Care	\$25	50% after deductible	\$25	15% after deductible	\$10

Broker Quoting:

- Send to client

Begin quote and email to client.

Additional features:

- Add custom message
- Includes resume link

Share these plans

✕

Email anyone a direct link to this page

To

Email

Message

Client phone

(XXX) XXX-XXXX

Link

https://staging.healthsherpa.com/marketplace/compare?_agent_id=Un

[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”.

 Value Bronze 3 Free Visits - HMO EXPANDED BRONZE

Premium	Deductible	Out-of-pocket max	\$8,550
\$7 /mo was \$342	\$7,500 /yr	Doctor visits	50% after deductible
		Specialist visit	50% after deductible
		Generic drugs	\$20

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

 Value Bronze 3 Free Telehealth Visits - HMO EXPANDED BRONZE

Premium	Deductible	Out-of-pocket max	\$8,550
\$11 /mo was \$346	\$6,500 /yr	Doctor visits	\$25
		Specialist visit	40% after deductible
		Generic drugs	\$20

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



Application Flow

Privacy and use of information:

With Enhanced Direct Enrollment the application is completed on HealthSherpa.

Additional Information:

- Renewals are prefilled



Español (801) 123-1234

Save lead

Privacy statement

Double redirect

Here at UnitedHealthcare, we work with the Health Insurance Marketplace to help you get health coverage.

[Learn more about the Marketplace](#)

Privacy and the use of your information

Important Marketplace Emails: If the Marketplace has your email address, they'll automatically send you important information, updates, and reminders about Marketplace enrollment. You can opt out of these communications at any time. To do this, click on the "unsubscribe" link in the footer of any Marketplace email.

Privacy and the use of your information: The Marketplace will keep your information private as required by law. Your answers on this form will only be used to determine eligibility for health coverage or help paying for coverage. The Marketplace will check your answers using the information in their databases and

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

*Note: Application steps vary by household

Primary contact information:

UnitedHealthcare

Exchange Plans

Español (801) 123-1234

Primary contact

Your information

Home address

Contact details

Household

Additional information

Members

Income

Additional questions

Finalize

Primary contact

This is your application's primary contact in HealthCare.gov. Due to restrictions imposed by HealthCare.gov we cannot allow you to update this person's SSN or DOB once set. If you are unable to verify this person's identity or need to change/remove your primary contact you'll either need to start a new application or do so on [HealthCare.gov's website](#).

Your information

First name

Middle (Optional)

Last name

Suffix (Optional)

Dwayne

Curtis

Select

Date of birth

Sex

03/17/1986

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.

Primary contact

Your information

Home address

Contact details

Household

Additional information

Members

Income

Additional questions

Finalize

Home address

Enter your permanent address.

Street address

Apt. / Ste. (Optional)

100 N 3rd St

City

State

Zip code

Phoenix

Ariz...

85001

County

Maricopa

☐

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

Is your mailing address the same as your permanent address?

Yes

No

Back

Continue

Primary contact

Your information

Home address

Contact details

Household

Additional information

Members

Income

Additional questions

Finalize

Contact details

Email address

laken@healthsherpa.com

☐

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

Phone number

Extension

Type

(503) 123-123

Ho...

Add a second phone number

Written language

Spoken language

English

English

Back

Continue

*Note: Application steps vary by household

Household 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

Who's applying for coverage?

Is Dwayne Curtis 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? ⓘ

+ Add spouse + Add another person

Back Continue

Primary contact ☒ Household ☒

Additional information

Other family relationships

Members

Income

Additional questions

Finalize

Additional Relationship Information

Other relationships for Dwayne Curtis

Does Dwayne Curtis live with someone under the age of 19?

☐ Yes ☒ No

Back Continue

Primary contact ☒ Household

Household

Who's applying? ☒

Residence ☒

Tax household

Additional information

Members

Income

Additional questions

Finalize

Your tax information

Are you married?

☐ Yes ☒ No

Do you plan to file a federal income tax return for 2021?
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 2021?

☐ Yes ☒ No

Will you be claimed as a tax dependent by someone else for 2021?

☐ Yes ☒ No

Back Continue

*Note: Application steps vary by household

Applicants:

Primary contact

Household

Additional information

Members

Dwayne Curtis

Dwayne Curtis

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.

☐ 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

Dwayne Curtis

Dwayne Curtis

Income

Additional questions

Finalize

Applicants

Your Information

Is Dwayne a naturalized or derived citizen? ⓘ

☐ Yes

☒ No

Back

Continue

*Note: Application steps vary by household

Income:

Primary contact

Household

Additional information

Members

Income

Dwayne Curtis

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 Dwayne Curtis

Does Dwayne currently get any income?

☒ Yes

☐ No

Tell us about any income Dwayne will have this month.

Type	How much	
Self-employment	\$3,000.00 per month	Edit Remove

Add new income source

Add new income source

Deductions for Dwayne Curtis

Does Dwayne have any deductions for 2021?

☐ Yes

☒ No

Yearly income for Dwayne Curtis

Based on what you entered, Dwayne's income minus any deductions for 2021 will be about \$36,000.00. Is this correct?

☒ Yes

☐ No

Back

Continue

*Note: Application steps vary by household

Additional Questions:

Primary contact

Household

Additional information

Members

Income

Additional questions

Extra help

Coverage

Employer coverage

Additional questions

Finalize

Additional questions

Unemployment income

Have any of these people gotten, or been approved to get, unemployment compensation for 2021? [?](#)

☐

Dwayne Curtis

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) [?](#)

☐

Dwayne Curtis

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) [?](#)

☐

Dwayne Curtis

Voter Registration Question:

Voter registration

Would you like information on registering to vote?

Resources are available if you're interested, but your eligibility for health coverage isn't linked in any way to being registered to vote. If you're already registered to vote, keep your information up-to-date. ⓘ

☐ Yes

☐ No

☐ Prefer not to answer



Your eligibility results are ready

You've submitted your application. Select "See eligibility results" to see what programs and savings you and other household members may qualify for.

See eligibility results

Voter Registration

Earlier you told us you'd like information on how to register to vote. You can go to <http://Vote.gov> for more information, registration deadlines, and resources for your state. That link will open in a new tab or window, so you'll still be able to continue with your application.

Finalize:

Primary contact

Household

Additional information

Members

Income

Additional questions

Finalize

Review

Agreements

Tax attestation

Sign and submit

Finalize

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

Primary contact

Full name: Dwayne Curtis

Address: 100 N 3rd St , Phoenix, AZ 85001

Phone number: 5031231234

Email: laken@healthsherpa.com

Get updates by email: No

Preferred written language: English

Preferred spoken language: English

Household members

Name	DOB	SSN	Relationship	Sex	Applying
Dwayne Curtis	1986-03-17	***-**-1410	Self	Male	Yes

Household income

Print

Edit

Edit

Edit

Finalize:

Finalize

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 my Marketplace account or by calling the 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 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

Dwayne Curtis, type your full name below to sign electronically.

Back

Continue

Additional Questions - Special Enrollment:

Additional Information:

- Qualifying Life Events
- Only displays during SEP

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)

*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:

- You must download the eligibility letter in order to review the plan

Eligibility Results

Name	Eligibility
 Dwayne Curtis	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 by 6/25/2021

Your household qualifies for a **total monthly tax credit of \$215**.

Your coverage will have an **effective date of 06/01/2021**.

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

Download Eligibility Letter

Review plan

Not the results you expected?

Edit your application

Confirm your plan

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

Confirmation Page:

Additional Information:

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

Plan summary

Coverage begins on 6/1/2021



Value Bronze 3 Free Visits - HMO

EXPANDED BRONZE

Premium

\$127.14 / mo

\$342.14 list price

Deductible

\$7,500 / yr

Out of pocket

\$8,550 / yr

Savings

Your household qualifies for a \$215 per month savings on your premium.

☒ I want to apply all of my savings

Eligibility

Name	Covered by this plan	Next step
Dwayne Curtis	Yes	Enroll

Enroll in this plan

Not the results you expected?

[Edit your application](#)

or

[Change your plan](#)

Confirmation:



Español (801) 123-1234

A verification email has been sent to your email. Please click the link to claim this application.

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:

- **Dwayne Curtis**
Verify loss of coverage by 6/25/2021

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.



Value Bronze 3 Free Visits

\$127.14/mo

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 **\$127.14** by **5/31/2021**. 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.

Log into your dashboard to complete these last few steps:

[Go to my dashboard](#)

Expect communications from us and from the Marketplace. When you hear from HealthCare.gov:

Read your notices and emails.

HealthCare.gov may send you notices and communications about your coverage. Log in to your account with us to view your Marketplace notices, make updates to your application or coverage, and manage your information.

Upload documents through UnitedHealthcare. We can help you submit documents if the Marketplace needs to confirm your information.

Download forms you'll need when you file your federal income tax return.

What if I need to update my information later?

If you have a life change, like you move, have a change in income, or get married, please let us know right away. To do this, log in to yourUnitedHealthcare dashboard and click the "Update" button.

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.



MarketingTab

MarketingTab:

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

Additional features:

- Generates a record in your leads tab
- Retains broker NPN
- Enrollment credited to the agent who sent link, not the agent during the prior year

The screenshot shows the United Healthcare Marketing site interface. At the top, the United Healthcare logo is on the left, and 'Carrier Name Test' and 'NPN: 17169718' are in the center. On the right, there are links for 'Start application', 'Search Marketplace', and a 'Quote' button. A left sidebar contains navigation links: 'Clients', 'Leads', 'Insights', 'Marketing' (which is highlighted), and 'Settings'. The main content area is titled 'Marketing' and features a section 'Your free, custom ACA Marketing site'. This section includes three sub-sections: 'Let clients self-enroll' (explaining that clients can shop and enroll on their own), 'Track their progress' (explaining that the 'Leads list' tracks shoppers), and 'Custom to you' (explaining that all enrollments use the broker's NPN). To the right of these sections is a preview of the custom ACA Marketing site, which includes a form with fields for 'First name', 'Last name', 'Email', and 'Phone', and a 'See plans & prices' button. Below the preview, there is a paragraph explaining that the branded site can be shared with consumers and that the broker's NPN goes on all applications. This is followed by a 'Direct Link' section with a paragraph explaining that the link can be shared with clients or posted on a website. At the bottom, there is a text box containing the URL 'https://staging.healthsherpa.com/?_agent_id=United', with 'Copy', 'Edit', and 'Convert to Spanish' buttons. A green arrow points to the 'Copy' button.

United Healthcare
Exchange Plans

Carrier Name Test
NPN: 17169718

Start application Search Marketplace Quote

Marketing

Your free, custom ACA Marketing site

Let clients self-enroll
Clients can shop and enroll on their own. Scale your business online by sharing you link via email, social media, or ads.

Track their progress
Your [Leads list](#) tracks shoppers on your site. Any shoppers who enroll appear on your [Clients list](#).

Custom to you
All enrollments use your NPN, so you get commission. The plan list only shows your appointed [carriers](#).

Easily find and affordable health plan.

See plans & prices

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://staging.healthsherpa.com/?_agent_id=United

Copy Edit Convert to Spanish



Shared Book

Shared Book

Let agents within agencies help each other's clients

The Shared Book feature makes it easy for agents within agencies to access each other's clients and leads.

This will be crucial for call centers or other agency setups that rely on agents being able to help out each other's clients.

Selecting agents for Shared Book:

Agency Admins will be able to select which agents they want in their Shared Book. For example, they may want to add only call center agents, or the entire downline. To select Shared Book agents, just go to the Agency page and check the boxes under the "Shared Book" column.

- You can select any agent in your direct downline (not sub-agencies) who've enabled [EDE](#).
- You'll probably want to select your own account too.
- Any agents selected will have access to each other's clients and leads.
- Any agents who are not selected will have the regular account experience, seeing only their own clients and leads.

YOUR AGENTS					
Name	Clients	NPN	Override NPN (3) ?	Shared Book (3) ?	Admin ?
Jennifer Grayson	184	19338001	☒	☒	☒
Juan Diaz	33	3232245	☐	☒	☒
Gerald Gordon	56	2382335	☐	☐	☐
David Crandall	111	4365442	☒	☒	☒



Broker Renewal

Broker Renewal:

Quickly quote and search applications on the Marketplace



Carrier Name Test
NPN: 12169718

Start applicationSearch MarketplaceQuote

Search

Clients

CarrierStateDocumentsPaymentArchivedRenewal needed

SelectSelectSelectSelectYesNoYesNo

4 clientsRenewal emailExportImportView import history

	Client	Plan	Gross premium	Net premium	Effective	Created	Documents	Payment	Actions
☐	Dwayne Curtis Email	Value Bronze 3 Free Telehealth Visits	\$346.24	\$117.24	7/1/2021	6/8/2021	🔴 Action needed 🕒 As of today	🔴 Action needed 🕒 As of today	View
☐	Tom Brady Email	Balance Silver 3 Free Visits	\$478.47	\$287.47	3/1/2021	2/8/2021	🔴 Action needed 🕒 As of 6/8/2021	🔴 Action needed 🕒 As of 6/8/2021	View
☐	Bugs Bunny	Balance Plus Silver 3 Free	\$476.14	\$246.14	2/1/2021	2/8/2021	🔴 Action needed	🔴 Action needed	View

Privacy - Terms



Broker Renewal:

Quickly renew clients with a prefilled renewal application

Search results

By clicking "Add to clients" you attest that you have permission from the client to access their information.

Applicant	Address	Application	Actions
John Smith SSN: ***-**-2424 DOC: 08-12-1988	12 Sylvan Ave Newark, NJ 07071	2019 ID: 2348394320832	Renew
		2018 ID: 2348394320832	Update
John Smith SSN: ***-**-2424 DOC: 08-12-1988	1003 Jeffrey Ave Austin, TX 73301	2018 ID: 2348394320832	



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



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

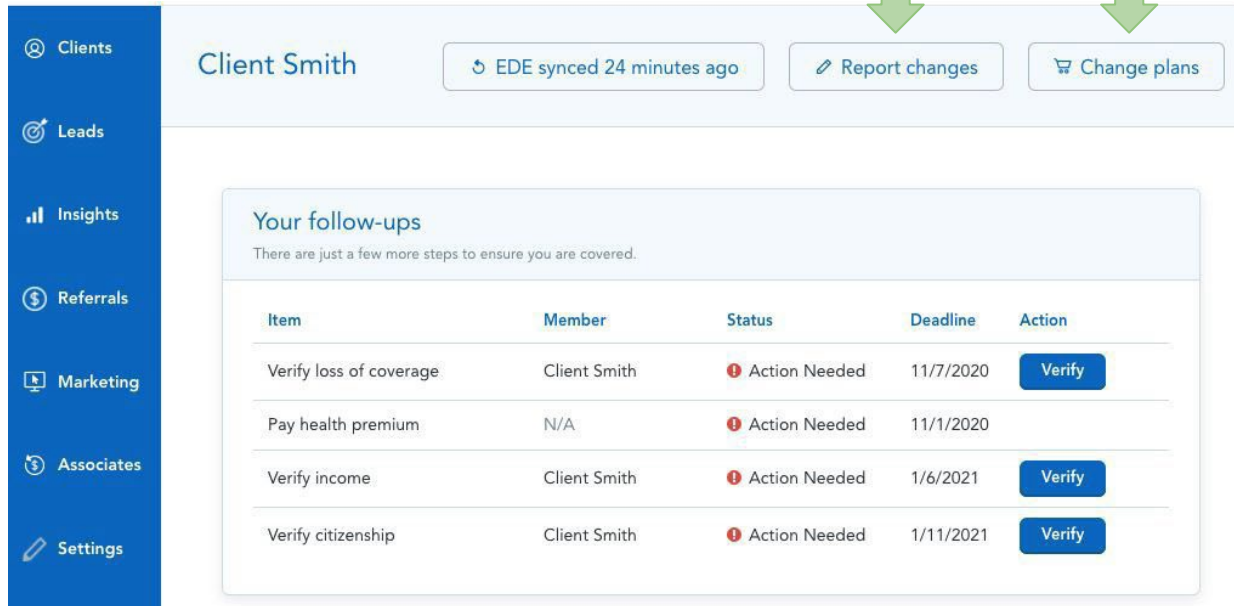
[Upload](#)

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 client's detail page.



The screenshot displays the 'Client Smith' detail page. On the left is a blue sidebar with navigation links: Clients, Leads, Insights, Referrals, Marketing, Associates, and Settings. The main header area shows 'Client Smith' with a status 'EDE synced 24 minutes ago' and two buttons: 'Report changes' (highlighted with a green arrow) and 'Change plans' (also highlighted with a green arrow). Below the header is a section titled 'Your follow-ups' with a subtitle 'There are just a few more steps to ensure you are covered.' It contains a table with follow-up items.

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

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:

MM/DD/YYYY

Back

Cancel or terminate your policy



Window Shopping: Brokers

Time period when users can see PY2026 plans prior to 11/1

Plan Year Toggle

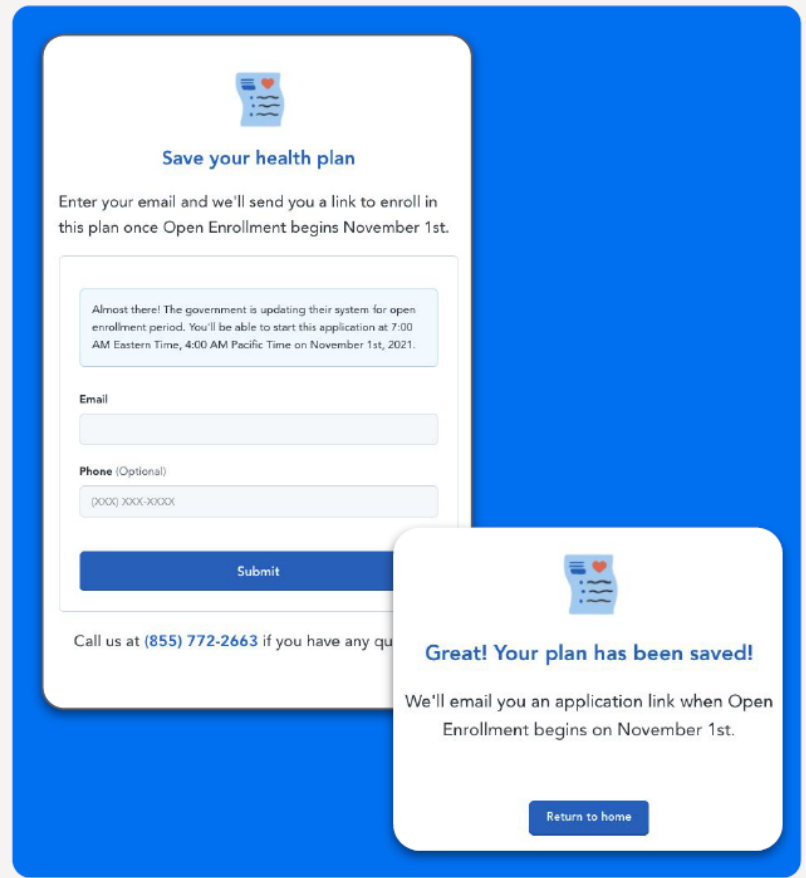
- The broker will quote for plan year 2025 with the plan year toggle on the “All plans” page.
- Once plans have been selected, clicking “Start application” will prompt the broker for email and phone number (optional).
- This creates a lead record with the plan selection saved to the account.
- An email will not be sent to broker leads or clients automatically. The broker follows up directly with their leads.

The screenshot displays the 'All plans' section of a website. At the top, there are three tabs: 'Most affordable', 'Lowest premium', and 'All plans' (which is active and highlighted in dark blue). Below the tabs, on the left, is a light blue box containing the text 'Estimated savings' and '\$260/mo', and another box below it with 'Cost sharing reduction' and a 'CSR' badge. In the center, it says '14 plans' and 'Lowest premium plan'. Below this, a plan is shown for 'United Healthcare' with the title 'UHC Bronze Standard - HMO'. It includes a 'LOWEST PREMIUM' badge, a star rating of 4.5 (represented by four yellow stars and one half-filled star), and an 'EASY PRICING' badge. On the right side, there is a dropdown menu for 'Plan year 2026' which is open, showing options for '2025' and '2026'. The '2025' option is highlighted in blue. A red rectangle is drawn around the dropdown menu.

Save Plan & Lead Capture

After selecting “Enroll”, the user will be prompted to enter in their email (phone number is optional) to:

- save their plan selection
- receive a reminder email once OE begins.
- User sees confirmation after submission.
- Return to home takes you to the landing page.



The image shows a digital form titled "Save your health plan" set against a blue background. The form is white with rounded corners and contains the following elements:

- Header:** A blue icon of a document with a heart and a checklist, followed by the title "Save your health plan" in blue.
- Text:** "Enter your email and we'll send you a link to enroll in this plan once Open Enrollment begins November 1st."
- Information Box:** A light blue box with the text: "Almost there! The government is updating their system for open enrollment period. You'll be able to start this application at 7:00 AM Eastern Time, 4:00 AM Pacific Time on November 1st, 2021."
- Form Fields:** Two input fields. The first is labeled "Email" and the second is labeled "Phone (Optional)" with a placeholder "(000) XXX-XXXX".
- Submit Button:** A blue button with the text "Submit".
- Footer:** "Call us at (855) 772-2663 if you have any questions."

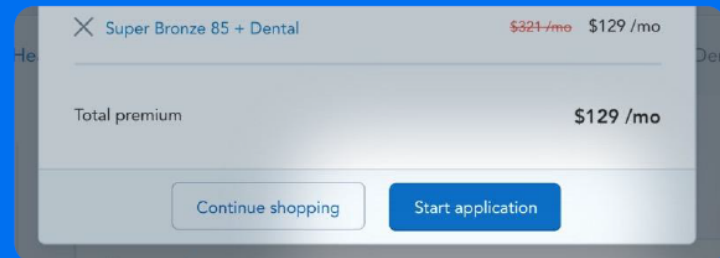
Overlaid on the bottom right of the form is a white confirmation box with rounded corners and a blue border. It contains:

- Header:** The same blue icon as the main form, followed by the title "Great! Your plan has been saved!" in blue.
- Text:** "We'll email you an application link when Open Enrollment begins on November 1st."
- Return Button:** A blue button with the text "Return to home".

New Lead

For brokers, the experience is similar for new leads.

- The broker will quote for plan year 2026 with the plan year toggle on the “All plans” page.
- Once plans have been selected, clicking “Start application” will prompt the broker for email and phone number (optional).
- This creates a lead record with the plan selection saved to the account.
- An email will not be sent to broker leads or clients automatically. The broker follows up directly with their leads.



Renew Plan

For existing clients who are renewing, the broker can:

- Click “Renew for 2026” and it will pull up the window shopping experience for that particular client.
- Shop and select plans as typical.
- Clicking “Start application” will save the plan selection to the client profile.
- An email will not be sent to broker leads or clients automatically. The broker follows up directly with their leads.

Liam Radford – 2025 application

Application Household profile Documents Notes

Renew for 2026 Edit 2025 application More applications

Last synced 1/29/2025, 10:10 AM

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

Item	Member
Verify income	Liam Radford
Pay premium	N/A

2025 application

2026 application
Not started

2025 application (active)
Created 1/24/24

2024 application
Created 2/20/23

2024 application
Created 1/23/25

Can't find an application?
[Search the Marketplace](#)

Action required 12/14/202



UHC Specific Features For PY2026

Non-Filled Benefits:

Refreshed UX experience to highlight new 2026 non-filled benefits within HealthSherpa

- UHC-only enhancement – HC.gov has no way of displaying this information
- Located in the selected plan details section
 - UX dynamic depending on selected plan



Additional plan benefits and features

In addition to the standard benefits offered, your plan offers the additional benefits below.

Digital Fitness Classes from One Pass™ ⓘ

With on-demand and livestreaming digital fitness classes from One Pass™, you can get all the fitness you want at no additional cost.

Earn a \$100 prepaid Visa card ⓘ

Earn a \$100 reward on a prepaid Visa card upon completion of five activities.

Walgreens Discount ⓘ

20% off Walgreens-brand health and wellness products

Virtual Urgent Care ⓘ

Get the care you need with a virtual visit.

HSA ⓘ

You can contribute dollars to your plan, pre-tax, and spend those dollars on qualifying health care costs at any time, not just this year.

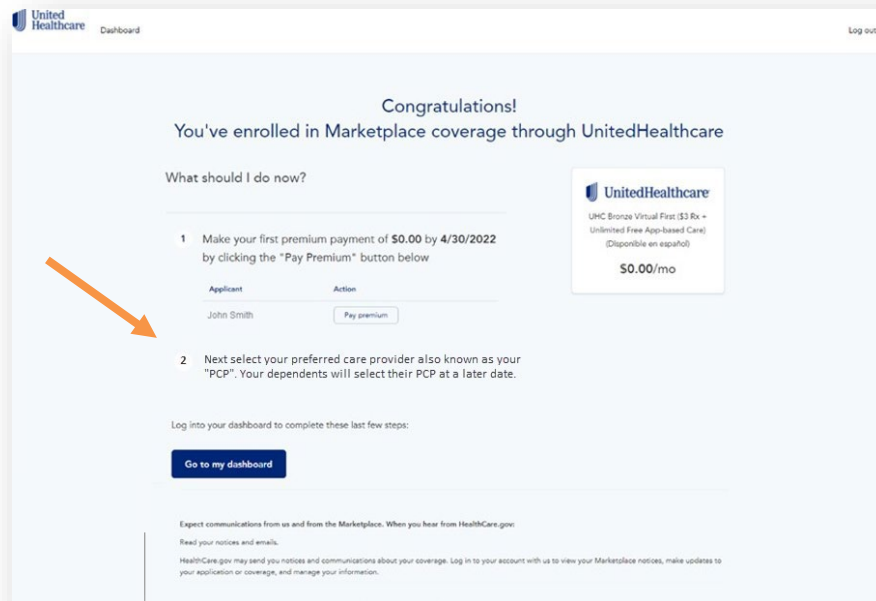
Virtual Primary Care ⓘ

Low-cost virtual primary visits are available.

PCP Copy On Enrollment Success Page:

Callout on the HealthSherpa confirmation page for subscribers to add their PCP

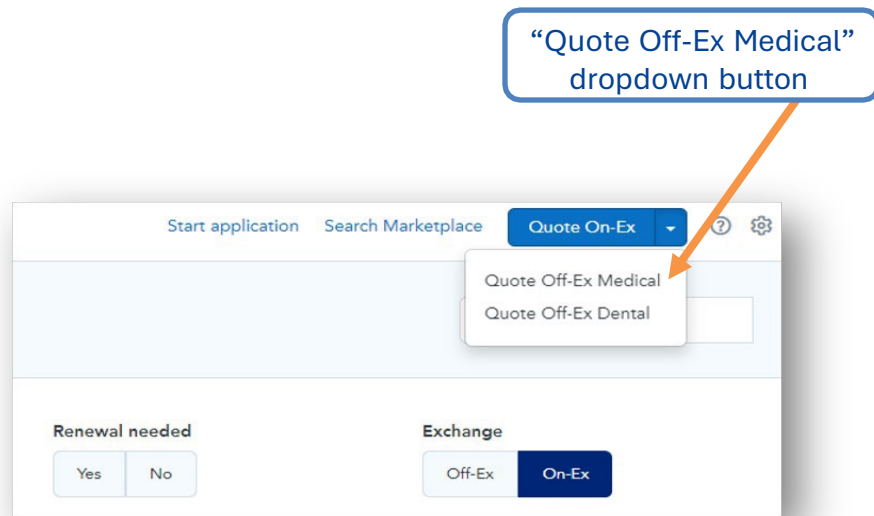
- Helps sets expectations for consumer as they leave HealthSherpa to go to myUHC.com



Off-Exchange Medical Plans:

Off-Exchange Capabilities:

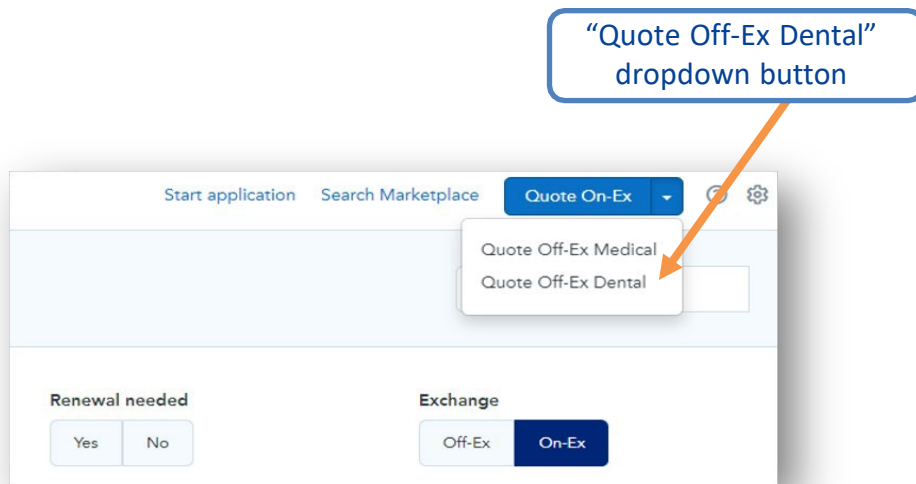
- Available to Brokers, Telesales, and Direct to Consumers
- Available in all UHC in footprint markets
- Same basic flow as On-Exchange
- Will leverage Pay Now + PCP selection capability (Outside of Kelsey-Seybold plans)



Off-Exchange Dental Plans:

Off-Exchange Capabilities:

- Available to Brokers, Telesales, and Direct to Consumers





PY2026 New HealthSherpa Features

Improved Agent Insights:

CMS docs needed:

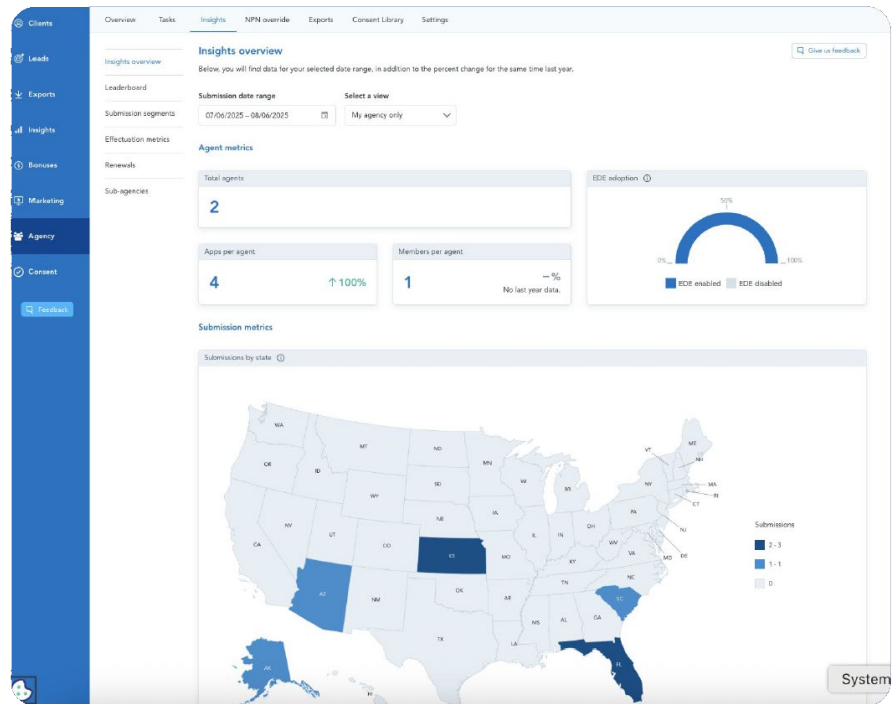
- Easy consumer uploads for: SEP & DMIs
- Exports for clients at risk or with outstanding follow ups

Platform reporting for BoB:

- Consolidated follow-up reporting for agents
- Renewal risk reporting - updated continuously
- Agency insights: in-platform agency KPI reports
- Exports for clients with Invalid Action

Agent efficiency:

- “Skip to the End”
- Renewal intake forms
- Carrier policy status feed tab on Client Details
- Consent management



Improved Agency-level Insight Reporting:

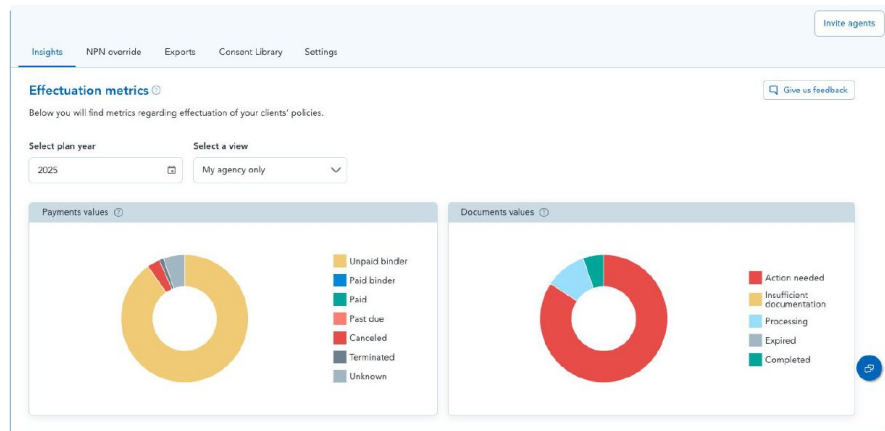
Understand enrollment performance and consumer risk at your Agency level.

Insights include:

- Renewals
- Effectuation status
- Submissions by geo, agent, metal level +

Carrier Action:

- Provide real-time policy status data to enable accurate agency risk reporting

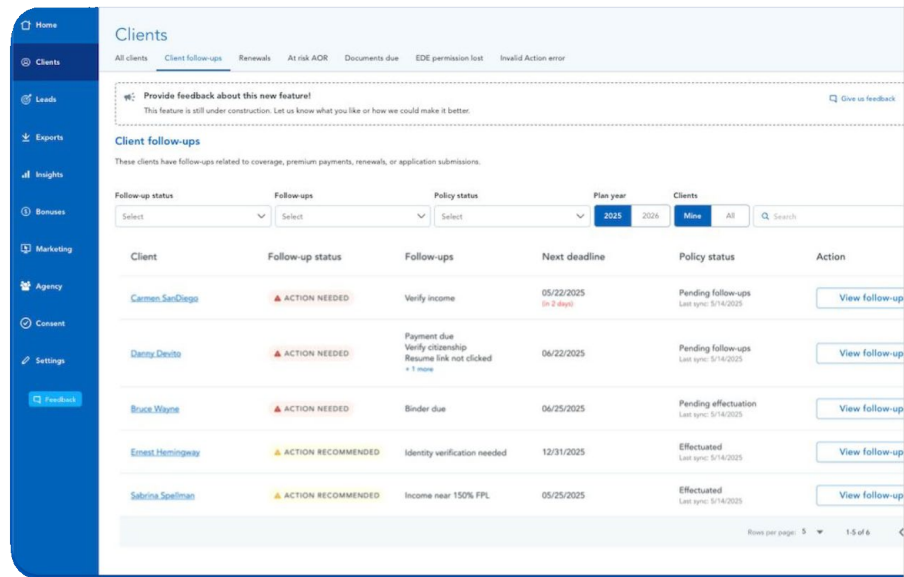


Improved Consolidated Agent Follow Ups:

Agents can now track all of their follow ups in one single view with a clear next step.

- Combined five different tabs into one, along with a Follow-up Status to make it easy
- No need to click around - track items and take actions all in one place
- Filters & searches, including by priority status and policy status

Carriers with policy status feed integration will have more up to date information on this page.



Client follow-ups

These clients have follow-ups related to coverage, premium payments, renewals, or application submissions.

Follow-up status	Follow-ups	Policy status	Plan year	Clients	
Select	Select	Select	2025 2026	More All	Search
Client	Follow-up status	Follow-ups	Next deadline	Policy status	Action
Clerman, San Diego	ACTION NEEDED	Verify income	05/22/2025 (in 2 days)	Pending follow-ups Last sync: 5/14/2025	View follow-up
Danny, Davis	ACTION NEEDED	Payment due Verify citizenship Resume link not clicked + 1 more	06/22/2025	Pending follow-ups Last sync: 5/14/2025	View follow-up
Bruce, Wilcox	ACTION NEEDED	Binder due	06/25/2025	Pending effectuation Last sync: 5/14/2025	View follow-up
Ernest, Hemingway	ACTION RECOMMENDED	Identity verification needed	12/31/2025	Effectuated Last sync: 5/14/2025	View follow-up
Sabrina, Spellman	ACTION RECOMMENDED	Income near 150% FPL	05/25/2025	Effectuated Last sync: 5/14/2025	View follow-up

Rows per page: 5 15 of 6

New Carrier Policy New Status Data Tab:

Agents can now see Carrier Policy Status Feed data, or request it if it is not available.

- Allows Marketplace agents to view both CMS and carrier provided data for a policy
- Thousands of requests for specific carrier policy data have been captured

The screenshot displays the 'Plans 2024' interface. At the top, there's a 'View Plan History' button. Below it, the 'Health plan' section shows the Aqua Health logo, 'EXPANDED BRONZE' status, and plan details: 'Community Blue 70/50 \$4550 - POS'. Financial details are listed: Premium \$142.93 (with a note 'Was \$449.70'), Deductible \$4,550, and OOP max \$9,450. Links for 'View full plan details' and 'View summary of benefits' are provided. A support section offers contact info for ID cards (222) 222-2222 and payments (111) 111-1111.

The 'CMS Data' tab is active, showing 'Premier Partner Data'. It includes a 'Status' section with a 'PENDING' indicator. Below this, a table lists key dates and information:

Field	Value
Effective	3/1/2024
Expiration	12/31/2024
Agent of Record	Agent Name (NPN: 12345)
Payment Status	UNPAID BRIDER
Due date	3/1/2024
Autopay	Unknown

Buttons for 'Pay premium' and 'Cancel plan' are at the bottom. A 'View Plan History' button is also present in the top right of the CMS Data section.

Below the main interface, a smaller window shows a message: 'Premier Partner carriers share updates with us so you can see the most accurate info and help your clients stay covered. Learn more'. It also states 'Aqua Health hasn't shared this data yet.' and includes a 'Let them know you wait?' button and a 'Cancel plan' button.

Easier Consumer Doc Collection:

- The ability to pre-collect documents from leads and clients (before CMS triggers)
- A documents tab on the client details level that functions as a document inbox
- Agents can easily re-trigger a request

Share intake link

Email the link

Copy the link

Collect documents early to save time. Add a message below to tell your client what you need.

Recipient email

janeesposito123@gmail.com

Subject

Upload documents for your Health Insurance

Message

Hi Jane,

To complete your Health Insurance application, I'll need a few documents from you.

Write a message (optional)

Use the link below to upload the following:

- Photo ID – Driver's license, state ID, or passport
- Proof of income – Most recent pay stub or income from any jobs (this is used to calculate your subsidy)
- Immigration documents (if applicable) – Green card, work visa, or other proof of legal residency

Thanks!

Upload documents securely

Mark Smith
Mark Smith Insurance Agency
(555)123-4567

After your client uploads documents, you'll find them in the documents tab. This message and any client replies will be saved in your clients notes for easy reference. [Learn more about the client intake link](#)

Cancel

Send

Pre-collect renewal info:

To make collecting consumer information even easier, agents will be able to send a link to a renewal intake form.

Consumers will highlight changes, including changes, including to

- Income
- Address
- Household

The screenshot shows a web form for HealthSherpa. At the top, there's a blue header with the HealthSherpa logo and a security notice: "Your information is secure and protected." On the right of the header, it says "Need help? Call Mark at (555)123-4567". Below the header, the form is titled "Welcome, Jane." and "Message from Mark Smith". A message box says "Let me know about any big changes from last year! Give me a call if you have any questions." The main section is "Update info" with the subtext "Help us keep your info up to date for next year's plan and financial assistance." There are three main sections for updates: 1. "My phone number or email has changed." with radio buttons for "Yes" (selected) and "No". Below are input fields for "Email address" (jane.esposito123@gmail.com) and "Phone number" (206682-9182). 2. "My tax household size has changed." with radio buttons for "Yes" (selected) and "No". Below is a section "Who is applying for coverage?" with a table for household members. The table has columns for Name, Date of birth, and Sex. It lists Jane Esposito (07/15/1987, Female) and Mario Esposito (07/15/1989, Male). There is a link to "Add another household member". 3. "I, or my spouse, get health insurance from a job." with radio buttons for "Yes" (selected) and "No".

HealthSherpa

Your information is secure and protected. Need help? Call Mark at (555)123-4567

Welcome, Jane.

Message from Mark Smith

Let me know about any big changes from last year! Give me a call if you have any questions.

Update info
Help us keep your info up to date for next year's plan and financial assistance.

☒ Yes ☐ No

My phone number or email has changed.

Email address: jane.esposito123@gmail.com Phone number: (206)682-9182

☒ Yes ☐ No

My tax household size has changed. e.g. someone moved out, a marriage, a divorce, a baby was born, etc.

Who is applying for coverage?

Name	Date of birth	Sex
Jane Esposito	07/15/1987	Female
Mario Esposito	07/15/1989	Male

+ Add another household member

☒ Yes ☐ No

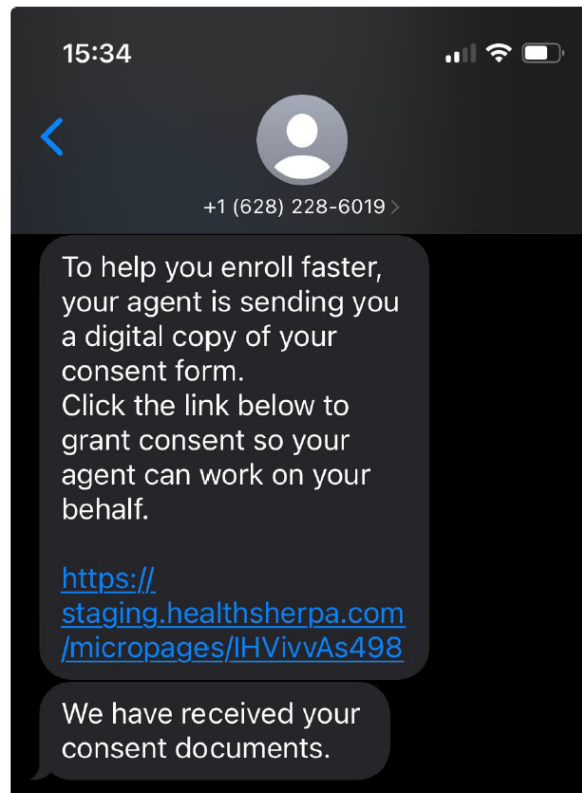
I, or my spouse, get health insurance from a job.

New Consent Capture:

HealthSherpa supports multiple consent capture points within the enrollment flow and agent dashboard.

This includes the ability to download and share approved consent forms, send, and manage consumer consent to remain in compliance.

- Ability to text consent to consumers
- Consent status included on enrollment exports
- Active Consent library for consent management



Improved Renewal Process:

We're investing in our agent's renewals user experience to:

- Make it a streamlined process
- Improve bulk renewal outreach functionality to consumers
- Launch a renewal plan comparison - current PY and renewing plan. Agents & consumers

The screenshot displays the 'Mark Smith Insurance Services' dashboard. The main section is titled 'Review your renewing plan estimate' and includes a 'Start 2026 renewal' button. It compares the '2025 - Current plan' (Everyday Bronze - PPO) with the '2026 - Renewing plan' (Everyday Bronze - PPO). A table below compares various plan features, including ratings, premiums, deductibles, and provider coverage. The table shows that the 2026 plan has a higher monthly premium (\$371.50 vs \$271.50) but a lower out-of-pocket maximum (\$8,200 vs \$9,200). Coverage for providers and prescriptions is also compared.

	2025 - Current plan	2026 - Renewing plan
RATING	★★★★☆	★★★★☆
MONTHLY PREMIUM	\$271.50	\$371.50 (\$100 increase)
DEDUCTIBLE (HEALTH + KK)	\$7,500	\$7,500
DRUG DEDUCTIBLE	N/A	N/A
OUT-OF-POCKET MAX	\$9,200	\$8,200 (\$1,000 decrease)
DOCTOR VISITS	\$50	\$50
SPECIALIST VISIT	\$100	\$100
ANDREW SMITH, MD Physician assistant Medicaid	Not accepted	Coverage supported
JENNIFER SMITH, PA Physician assistant	✓	✓
BENJAMIN BRADLEY Student in an organized health care education / training program	✓	Not accepted Coverage lost
TOPIRAMATE EXTENDED RELEASE ORAL CAPSULE	Not covered	Coverage supported
QUERKEY TOPIRAMATE EXTENDED RELEASE ORAL CAPSULE	✓	Not covered Coverage lost
SENDEFOAM BENZOYL PEROXIDE TOPICAL FOAM	Not covered	Not covered

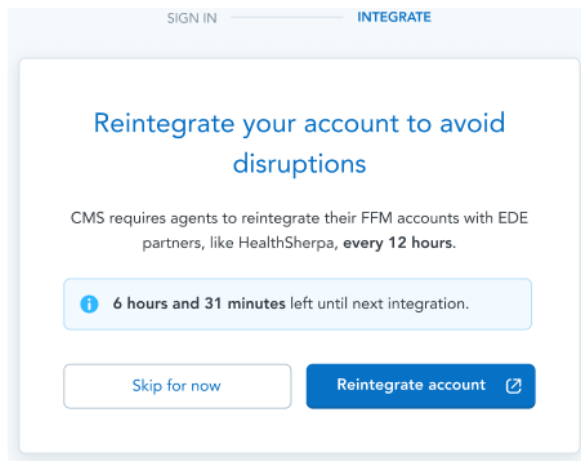


Existing HealthSherpa Features

FFM Integration Changes:

CMS Required Change: FFM Integration Every 12 hours

Previously, CMS required agents to integrate their FFM Accounts with their EDE Partner accounts every 30 days. The intent of the integration is to keep on-exchange consumers' data as secure as possible and record what agents' FFM IDs are associated with that consumer to better track fraudulent behaviors. With recent security guidance changes at the federal level, CMS has chosen to alter that requirement to require integration every 12 hours instead of every 30 days.



Be sure to check out our [FFM Integration FAQ](#) and notice the new FFM Integration options throughout HealthSherpa which will help you know when you're due to re-integrate.

Consent Functionality:

Digital initial Consent email option

HealthSherpa has released a new ability to request a digital copy of initial consent with clients via email.

Consent

 [Download consent form](#)

CMS requires you to collect written or verbal consent from your client before completing an enrollment.

How would you like to proceed?

- ☐ Email digital consent form to my client
- ☐ Upload proof of consent to HealthSherpa
- ☐ I already have proof of consent in my own records

[Back](#)

[Next](#)

Consent regulations do require that consent be gathered before you begin an application; if you would like to supplement that with a digital form at our privacy statement, you may do so by selecting "Email digital consent form to my client". This will send a link to an email address you enter to collect consent and store it in your dashboard.

Agent Consent Storage:

- Consent information is included in each client record and HealthSherpa stores required documents for the minimum of 10 years.

Plans 2023 Renew

Health plan Silver HMO 1250
Ambetter from Magnolia Health

BRONZE

\$175.45 Premium **\$1,250** Deductible **\$5,250** Out-of-pocket max
Wk \$1,000

[View full plan details →](#)

Status Enrolled

Members Jane Esposito, Danny Esposito

FFM ID 872490

FFM Subscriber ID 32322323214

Effective 1/1/2021

Documents [Summary of Benefits](#)

Carrier phone (916) 456-7778

Payment phone (916) 456-7778

[Pay premium](#) [Change plan](#) [Cancel plan](#)

Consent records

Method	Collection date	Consent status	Plan year	Download files	Action
Agent upload	01/03/2023	Collected	2023	Consent_01/02...	-

Marketplace notices

Consent & Review:

Detailed consent & review statuses on agency enrollment export

The on-exchange agency enrollment export now contains detailed initial consent and enrollment review statuses. This can help agency admins track consent and review statuses for enrollments within their agency.

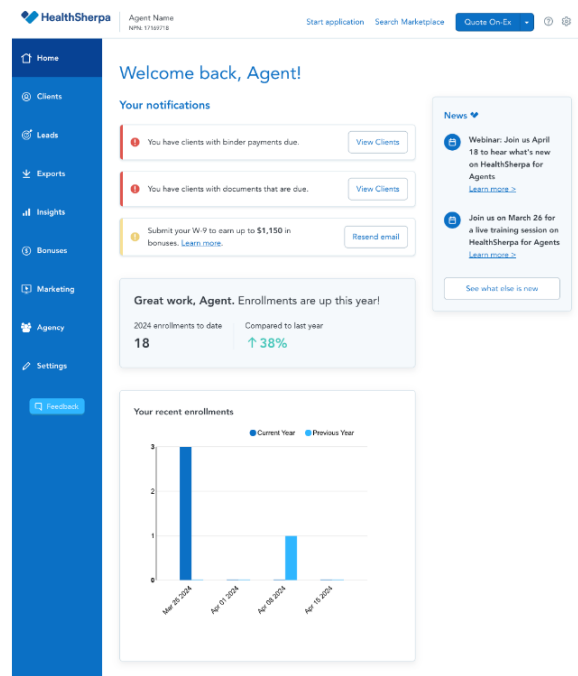
Export Column	Values	Description
consent_status	email_signed	Email for initial consent was received and signed by the consumer.
	uploaded	Agent uploaded a document for initial consent onto HealthSherpa.
	agent_retained	Agent indicated a document for initial consent exists outside of HealthSherpa.
	email_sent	Email for initial consent was sent to the consumer, but not yet signed.
	revoked	Agent has revoked initial consent.
	upload_later	Agent has indicated they will upload initial consent later.
consent_updated_at	TIMESTAMP	Time at which initial consent status was last updated.
review_status	email_signed	Email for enrollment review was received and signed by the consumer.
	uploaded	Agent uploaded a document for enrollment review onto HealthSherpa.
	agent_retained	Agent indicated a document for enrollment review exists outside of HealthSherpa.
	email_sent	Email for enrollment review was sent to the consumer, but not yet signed.
	revoked	Agent has revoked enrollment review.
	upload_later	Agent has indicated they will upload enrollment review later.
review_updated_at	TIMESTAMP	Time at which enrollment review status was last updated.

Agent Home Page:

Dedicated agent home page

HealthSherpa has launched a new agent home page! This page is dedicated to providing users with relevant notifications, news, reports, and helpful resources.

Be sure to check it out on a regular basis to ensure you're not missing any important information or insights about your account and the HealthSherpa product.



Client Search Functionality:

New way to search your clients

Search your clients and leads by name, phone number, FFM ID, or the last four of their SSN.

Clients

[All clients](#) [At risk AOR](#) [Documents due](#) [EDE access revoked](#)

Search clients

Carrier

Select

State

Select

Documents

Select

Plan year

Select

Payment

Select

Archived status

Not archived

Exchange

On-Ex

Clients

Shared

Mine

Search by applicant names, phone number, FFM ID or last four digits of SSN

Client Filter Functionality:

Agents can filter clients by age

To assist with finding clients that are aging into Medicare or aging out of parent's coverage, HealthSherpha has added a date filter to the client dashboard.

The screenshot shows a client dashboard with a filter section at the top. The filters are arranged in two rows. The first row contains: Carrier (dropdown with 'Select'), State (dropdown with 'Select'), Documents (dropdown with 'Select'), Plan year (dropdown with 'Select'), Payment (dropdown with 'Select'), and Archived status (dropdown with 'Not archived'). The second row contains: Renewal status (dropdown with 'All'), Exchange (dropdown with 'On-Ex'), and Age (dropdown with 'Select'). The 'Age' dropdown is open, showing two options: 'Turning 26 in 6 months' and 'Turning 65 in 6 months', each with an unchecked checkbox. Below the filters, there is a pagination bar showing '1-10 of 24' and a 'Renewal Email' button. On the right side of the dashboard, there are 'Import' and 'Export' buttons.

Carrier	State	Documents	Plan year	Payment	Archived status
Select	Select	Select	Select	Select	Not archived
Renewal status	Exchange	Age			
All	On-Ex	Select			

1-10 of 24 [Renewal Email](#)

[Import](#) [Export](#)

Using this filter will identify clients on an enrollment that are turning either 26 or 65 in the next 6 months.

Client Policy ID:

Policy ID now available on the client details

The policy ID is now available on the client details page on the agent and consumer dashboard. This field represents the unique policy ID from the carrier, which HealthSherpa receives directly from CMS during syncs.

Plans 2024

View Plan History

United Healthcare

EXPANDED BRONZE

UHC Bronze Value (\$0 Virtual Urgent Care + \$0 PCP Visits, \$5 Tier 2 Rx, \$0 Insulin, No Referrals) - EPO

\$549.24

\$1,100

\$9,450

PremiumDeductibleOOP max

View full plan details

View summary of benefits

i

For questions about ID cards, please contact the carrier directly.

Status

Enrolled

Effective

3/1/2024

Expiration

12/31/2024

Members

Subscriber ID

Policy ID

123456

FFM ID

Carrier phone

1(866) 520-2507

Payment phone

1(866) 520-2507

Agent of Record

Change plan

Cancel plan

Policy ID now available on the enrollment export

For agents and agency admins, the policy ID is now available on the enrollment export.

This field - issuer_assigned_policy_id - represents the unique policy ID from the carrier. HealthSherpa receives this directly from CMS upon a sync.

This valuable piece of data can help agents and agencies connect records across carriers and HealthSherpa.

Doctor & Drug Functionality:

Doctor & drug persistence in shopping

To help agents and consumers easily find the right plan, doctor and drug selections previously entered in the left hand filter of the plan list will now persist across shopping experiences.

The screenshot displays a web application for shopping health plans. At the top, there's a navigation bar with 'Dashboard', 'Equalize', 'Log out', and 'Save Last'. Below this, a 'Plan Results' section shows '119 plans' and a 'Lowest Premium' filter. On the left, there are three filter sections: 'Monthly premium max' (ranging from \$234 to \$2,316), 'Max total deductible' (ranging from \$0 to \$9,450), and 'Providers' (listing Texas Health Presbyterian Hospital Allen). Below these are 'Prescriptions' and 'Carriers' filters. The main area displays two plan cards. The first card is for 'BSP Prime Silver HMO-003 (CMS Standardized Plan with \$0 Pediatric PCP copay) - HMO'. It shows a monthly premium of \$0.00, a deductible of \$0, and a plan cost of \$1,800. The second card is for 'BSP Prime Silver HMO-003 (CMS Standardized Plan with \$0 Pediatric PCP copay) - HMO'. It shows a monthly premium of \$0.00, a deductible of \$0, and a plan cost of \$1,800. Both cards include a 'Compare' button and a 'Plan details' link.

If an agent or consumer **resumes shopping after completing an application**, any previously entered doctor and drug selections will now persist in the left hand filter of the plan list. The same is true if an agent or consumer **changes or renews a plan with an existing client**.

Household Profile:

Household profile

HealthSherpa agent accounts now have access to a Household profile tab. It is accessible from the Client details page.

The screenshot shows the 'Household profile' tab for client Elsa Arendelle. The left sidebar contains navigation links: Home, Clients, Leads, Exports, Insights, Bonuses, Marketing, Settings, and Feedback. The main content area has two tabs: 'Client details' and 'Household profile' (which is active). Below the tabs are three sections: 'Primary client contact', 'Household members', and 'Associated applications'.

Primary client contact

Name: Elsa Arendelle
Email:
Phone: (415) 585-6845

Household members

Applicant	Gender	Relationship	Date of Birth	Age	SSN
Elsa Arendelle	Female	Myself	07/21/1989	34	

Associated applications

Plan Year	Primary Plan	Premium	Status	Match On	Federal Exchange ID	Archived
2024	Community Blue 70/50 \$4550	\$417.18	Unpaid binder	Phone	4390006648	Unarchived

This tab pulls together application records on the HealthSherpa platform by email and phone number. Information that can be accessed on the household profile tab includes primary client contact information, a list of household members, and a list of applications associated with that client household.

High Risk Client Functionality:

Flagging high risk clients

HealthSherpa has released a high risk client alert to inform agents when a client might be working with multiple agents.

When searching for a consumer on the Marketplace, HealthSherpa's algorithm will determine whether the client is likely to have been submitted by another agent, and will display a banner informing you if a client is deemed high risk.

Search results

Warning: this customer may be working with 4 other agents.

This may occur in situations where:

- The business that provided you this lead sold this on to other customers
- The consumer provided their information to multiple agents
- The consumer responded to an illegitimate ad offering them free money on social media

CMS requires explicit consent prior to working with a consumer. Please only claim this application if you have verified with the individual that you are indeed their preferred agent. [Learn more](#)

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

Applicant	Details	Status	
		✔ Submitted	<button>View in Dash</button>

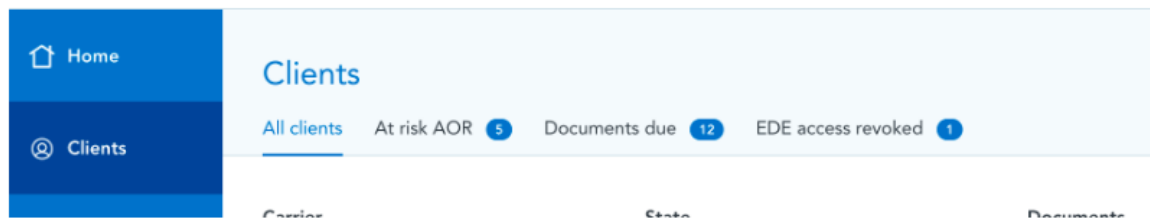
Not the results you were expecting? [Create a new application.](#)

You can also search using our [Healthcare.gov redirect](#) ⓘ

Alert Indicators:

Alert indicators added to clients list tabs

To help agents flag new clients that have outstanding documents, an AOR at risk status, or EDE revoked, HealthSherpa has added alerts.



These alert indicators will give counts of new records in each tab since the agent last visited the list.

Documents Due and EDE Access Revoke Functionality:

Documents due and EDE access revoked tabs

HealthSherpa agent accounts now have access to a Documents due tab and an EDE access revoked tab in the Clients page.

The Documents due tab lists the Client Name, number of outstanding documents for that client, status, when this information was last synced, as well as the earliest deadline for the documents that are due.

Home

Clients

Leads

Exports

Insights

Settings

Feedback

Clients

All clientsAt risk AORDocuments due

Documents due

These clients need to upload documents to secure their subsidy or coverage. [Learn more.](#)

1-3 of 3

Client	Outstanding docs	Status	Earliest deadline	Last synced at
Marge Simpson	3	Action needed	2/13/2024	1/11/2024
Brent Fudge	2	Action needed	2/13/2024	11/15/2023
Rene Henry Ponce	3	Action needed	2/13/2024	11/21/2023
Donald Duck	1	Action needed	3/26/2024	1/12/2024
Edna Simpson	2	Action needed	4/16/2024	1/19/2024

The EDE access revoked tab lists the names of clients for whom EDE access has been lost.

Home

Clients

Leads

Exports

Insights

Bonuses

Marketing

Settings

Feedback

Clients

All clientsAt risk AORDocuments dueEDE Access Revoked

EDE access revoked

These are clients that have had EDE access revoked. [Learn more.](#)

1-2 of 2

Client	EDE Access Revoked	Last synced at
Donald Daffy	Revoked	01/31/2024 at 10:16am
Lilo Stitch	Revoked	01/30/2024 at 1:32pm

At-Risk AOR Functionality:

At-risk AOR tab

HealthSherpa agent accounts now have access to an At-Risk AOR tab in the Clients page. The tab lists the Client Name, Federal Exchange ID, and the date this information was last synced (Last Synced At).

🏠 Clients

📊 Leads

📈 Insights

💰 Bonuses

🏢 Agency

👤 Associates

📢 Marketing

📄 FMO

🔔 Activity

⚙️ Settings

🆘 Help

⏏ Collapse

Clients

All clientsAt Risk AOR

At risk AOR

You may no longer be AOR for these clients. [Learn more.](#)

Showing 5 of 5

Client	Federal exchange ID	Last synced at
Jane Esposito	4594859483	1/14/2024
Tina Ander	4594859482	1/13/2024
Ray Sendak	4594859486	1/13/2024
Mike Crandall	4594859481	1/12/2024
Loreena Brown	4594859480	1/11/2024

Notes Tab:

Notes tab

Now, HealthSherpa agents can access a Notes tab from the Client details and Lead details pages. This tab has been pre-filled with notes previously written on application records.

Clients

Insights

Bonuses

Agency

Associates

Marketing

Jane Esposito

Client detailsHousehold profileNotes

Add a note

Had a phone call with Mia today and she informed me that she is going to be having a baby in September.

Add

Notes

Jane recently started a new job that doesn't offer health insurance benefits. We need to enroll her in a plan to ensure coverage for herself and her spouse Anthony, and children Mia and Gabriel.
Mar 9, 2024 (PST), 04:04 PM - Mark Smith

Anthony was diagnosed with type 2 diabetes and needs coverage for her prescriptions, he should be on a separate policy in 2023.
Feb 28, 2024 (PST), 04:04 PM - Mark Smith

Gabriel will be turning 26 in 2025.
Jan 04 2024 (PST), 04:04 PM - Mark Smith

Gabriel is planning to enroll in college out of state next year. We need to review ACA options that provide coverage both in his new state and for visits home to ensure he remains protected.
Jan 04 2024 (PST), 04:04 PM - Mark Smith

Anthony is a freelancer whose income fluctuates seasonally. Remember to check on this frequently.
Jan 04 2024 (PST), 04:04 PM - Mark Smith

Showing 5 of 42

<

1

2

3

...

6

>

Our hope is that agents can use this feature to capture notes about leads and clients over the course of many Special Enrollment Period and Open Enrollment Period interactions.

Export History:

Export History

Agents and agency admins now have access to their exports history in the exports tab.

Date Requested	Download Link	Export Type	Status
01/09/2024 at 3:33pm	Export Processing	Agency Enrollments	Processing
01/09/2024 at 3:32pm	Download	Agency EDE Permission Revoked	Download Ready
01/09/2024 at 3:32pm	Export Processing	Agency AOR at Risk	Processing
01/09/2024 at 3:31pm	Download	Agent EDE Permission Revoked	Download Ready
01/09/2024 at 3:30pm	Download	AOR at Risk	Download Ready
01/09/2024 at 10:50am	Download	Agency Enrollments	Download Ready
01/09/2024 at 3:54am	Download	Agency DMIs	Download Ready
01/09/2024 at 2:27am	Download	Agency DMIs	Download Ready
01/09/2024 at 2:13am	Download	Agency DMIs	Download Ready
01/09/2024 at 2:13am	Download	Agency DMIs	Download Ready

This will allow agents to access and re-download previously generated exports. They can also see when the export was requested, its type, and its status.

If an agent does not have access to the Exports tab, check with your agency admin to see if exports have been inadvertently disabled for the agency.

Client Export Functionality:

New columns added to the clients export

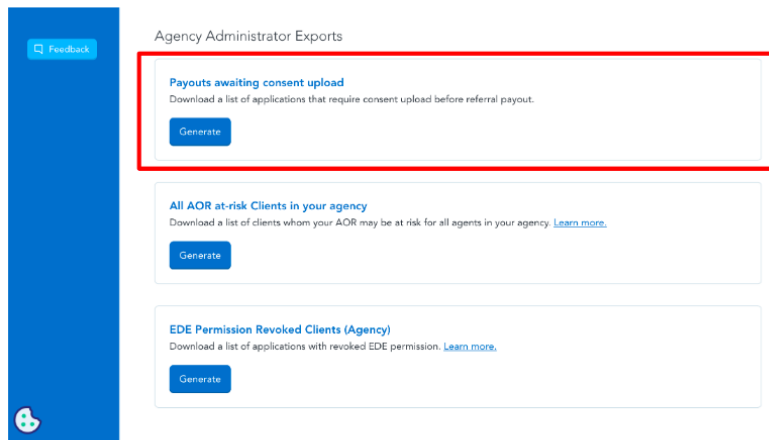
HealthSherpa has added the following new columns to the clients export:

- health_premium: the specific health premium amount
- dental_premium: the specific dental premium amount
- dental_policy_aor: the AOR on the dental policy (if present)

Export History:

Payouts awaiting consent upload Export

HealthSherpa has released a new export for agency admins - Payouts awaiting consent upload.



Feedback

Agency Administrator Exports

Payouts awaiting consent upload
Download a list of applications that require consent upload before referral payout.
[Generate](#)

All AOR at-risk Clients in your agency
Download a list of clients whom your AOR may be at risk for all agents in your agency. [Learn more.](#)
[Generate](#)

EDE Permission Revoked Clients (Agency)
Download a list of applications with revoked EDE permission. [Learn more.](#)
[Generate](#)

This report contains referral enrollments that need consent before payout can be administered for the admin's agency, and any downline agencies. Agency admins can use this report to follow-up with their agents to ensure the proper consent documentation is obtained for the referral.

Agency Insight Metrics:

New agency insights metrics

We've added additional agency metrics to the Insights page for agency admins.

These new metrics add the following information for your agency:

- Total number of applications submitted
- Total sum of gross premium
- Total lives affected through enrollments
- Percent of applications submitted using EDE

The screenshot displays the 'Insights' section of a dashboard. On the left is a blue sidebar with navigation links: Home, Clients, Leads, Exports, Insights (highlighted), Bonuses, Marketing, Agency, and Settings. At the bottom of the sidebar is a 'Feedback' button. The main content area has a light blue header with the title 'Insights', 'Chart Start Date' (10/05/2023), and 'Chart End Date' (03/05/2024). Below the header, there's a 'View insights for' dropdown menu set to 'Agency -'. A red rectangular box highlights four key metrics: '1,320 Applications Submitted', '\$1.5m Gross Premium', '3,210 Lives', and '100% EDE Adoption'. Below this, the section 'Your submissions by carrier' contains a table with columns 'Carrier', '#', and '%'. The table lists four carriers: Ambetter, Medica, Blue Cross and Blue Shield of Nebraska, and Wellmark Health Plan of Iowa, Inc.

Carrier	#	%
Ambetter	1,320	100%
Medica	1,320	100%
Blue Cross and Blue Shield of Nebraska	1,320	100%
Wellmark Health Plan of Iowa, Inc.	1,320	100%

Sub-Agency Search Functionality:

Search by sub-agency

Agency admins can search by sub-agency to view a specific downline cohort on their agency overview tab.

This will help agencies with more than 10+ sub-agencies quickly find their downline.

The screenshot displays the HealthSherpa Agency Overview dashboard. On the left is a blue sidebar with navigation links: Home, Clients, Leads, Exports, Insights, Bonuses, Marketing, Agency (selected), Settings, and Feedback. The main content area is titled 'Agency' and includes tabs for Overview, Insights, NPN override, Exports, and Referrals. Below these tabs, a 'HealthSherpa Agency' summary shows 19 Agents and 210 Clients. The 'Your sub-agencies' section features a search bar labeled 'Search by agency name' (highlighted with a red box) and a table with columns 'Name' and 'Phone'. The table lists two sub-agencies: 'PB & J' with phone '(804) 123-4567' and 'Quick and Efficient Insurance Agency' with phone '(855) 722-2663'. Below this is a pagination bar showing '1-2 of 2'. The 'Your agents' section at the bottom has a search bar labeled 'Search by agent name or NPN' and a table with columns: Name, Clients, NPN, Shared book, Full book, Admin, and a plus icon. The first row shows a blurred agent name, a blurred client count, a blurred NPN, an unchecked 'Shared book' checkbox, a checked 'Full book' checkbox, and 'Primary Admin' as the admin.

HealthSherpa

Start application Search Marketplace Quote On Ex

Home Clients Leads Exports Insights Bonuses Marketing Agency Settings Feedback

Agency

Overview Insights NPN override Exports Referrals

HealthSherpa Agency

Agents 19 Clients 210

Your sub-agencies

Search by agency name

Name	Phone
PB & J	(804) 123-4567
Quick and Efficient Insurance Agency	(855) 722-2663

1-2 of 2

Your agents

Search by agent name or NPN

Name	Clients	NPN	Shared book	Full book	Admin	
			☐	☒	Primary Admin	

Agency Admin Exports:

Agency admin exports available in the "Exports" tab

HealthSherpha has consolidated the agency admin exports into one place for quick and easy access - the agency "Exports" tab.

The screenshot displays the 'Agency Admin Exports' interface. On the left is a blue sidebar with navigation links: Home, Clients, Leads, Exports, Insights, Bonuses, Marketing, Agency (highlighted), and Settings. The top navigation bar includes 'Overview', 'Insights', 'NPI override', and 'Exports' (highlighted with a red box). A 'Invite agents' button is in the top right. The main content area is titled 'Exports' and contains a toggle for 'Allow exports for my agents?' (set to 'Allow exports'). Below this is a note: 'The below exports include enrollments across your agency and any sub-agencies. They are only available to agency administrators.' The interface lists seven export categories, each with a 'Generate' button: 'Enrollments' (with filters for 'On-Ex', 'Off-Ex', and a date range), 'Agent roster', 'DMI follow-ups', 'AOR at-risk clients', 'EDE permission revoked clients', and 'Payouts awaiting consent upload'. Each category includes a brief description of the report.

Agency

Overview Insights NPI override Exports Invite agents

Exports

Allow exports for my agents?

☒ Allow exports ☐ Prevent exports

The below exports include enrollments across your agency and any sub-agencies. They are only available to agency administrators.

Enrollments Generate

☒ On-Ex ☐ Off-Ex MM/DD/YYYY - MM/DD/YYYY ⓘ

☐ Include archived applications

☐ Include unsubmitted applications

Agent roster Generate

A report of all your agents.

DMI follow-ups Generate

A report of all outstanding DMIs.

AOR at-risk clients Generate

A report of applications for which AOR may be at risk. [Learn more](#)

EDE permission revoked clients Generate

A report of applications with revoked EDE permission. [Learn more](#)

Payouts awaiting consent upload Generate

A report of applications that require consent upload before referral payout.

Agency Admin Insights:

View aggregated downline agency insights

Agency admins now have the ability to view insights for their individual agency, or their entire agency downline. This can be done by selecting "downline aggregate" from the new "Select a view" dropdown on the agency insights tab.

The screenshot displays the 'Agency Admin Insights' dashboard. On the left is a blue sidebar with navigation links: Home, Clients, Leads, Exports, Insights (active), Bonuses, Marketing, Agency, and Settings. A 'Feedback' button is at the bottom of the sidebar. The main content area has a light blue header with the title 'Agency' and buttons for 'Export', 'Export Off-Ex', and 'Invite agents'. Below the header are tabs for 'Overview', 'Insights' (selected), and 'NPN override'. The 'Insights' section is titled 'Insights' and includes a note: 'Below, you will find data for your selected date range, in addition to the percent change for the same time last year.' A red box highlights the 'Select a view' dropdown menu, which is open and shows three options: 'My agency only' (selected), 'My agency only', and 'Downline aggregate'. To the right of the dropdown is a 'Submission date range' field showing '04/01/2024 - 05/01/2024'. Below these are four summary cards: 'My agency only' (871, +16%), 'Total premium' (\$729,194, +19%), 'Lives enrolled' (1,324, +21%), and 'EDE adoption' (100%, -0%). The bottom section is titled 'Enrollments by carrier' and contains a table with columns for Carrier, Enrollments, and Percent.

Carrier	Enrollments	Percent
Oscar Health Insurance	244	28.01%
Ambetter	242	27.78%

Agency Admin Functionality:

Updated agency admin experience

To help agency admins clearly understand their agency and any downlines, HealthSherpa has updated the Agency page. Admins will now see tabs - Overview, Insights, and NPN override - to get a detailed sense of how their agency is performing and operating.

Agency

Overview Insights NPN override

Export Export Off-Ex Invite agents

Agency Name

Your upline agency

Parent agency name

123-456-7890

Agents

17

Clients

1,202

Your sub-agencies

Name	Phone
Best agency	888-888-8888
Good agency	888-888-8888
Decent agency	888-888-8888

1-3

Be sure to check out the dedicated NPN override tab - though HealthSherpa hasn't changed any agency admin's configuration, now is a great time to cleanup your NPN overrides and ensure your list is correct for your agents and downline agents.

NPN override

[Give us feedback](#)

Override NPNs allow you to share NPNs between agents in your agency. The following NPNs are available to your agents as overrides. They will also be available to your downline agencies. [Learn more.](#)

NPN override should not be used to avoid state appointment laws. Agents and agencies using HealthSherpa are responsible for complying with federal and state laws, including when using NPN overrides. In most states, both agents must be appointed with the carrier to whom you are submitting an enrollment.

Allow my direct downline agents to use their own NPNs

This setting only applies if you've set an override NPN below. It will only affect your direct downline agents, not your downline agencies.

☒ Yes ☐ No

My override NPNs

[Add override NPN](#)

NPN ↑	Agent name ↑	NPN source ↑	Action ⌵
12345678	Elizabeth Ford	My agency	Delete
17169718	Hatch Downline	My agency	Delete

Export Functionality:

Improved delivery of large exports

To ensure large exports get delivered, HealthSherpa will be breaking them up and sending them in batches.

This will help our large agency partners in particular receive their data in a timely manner.

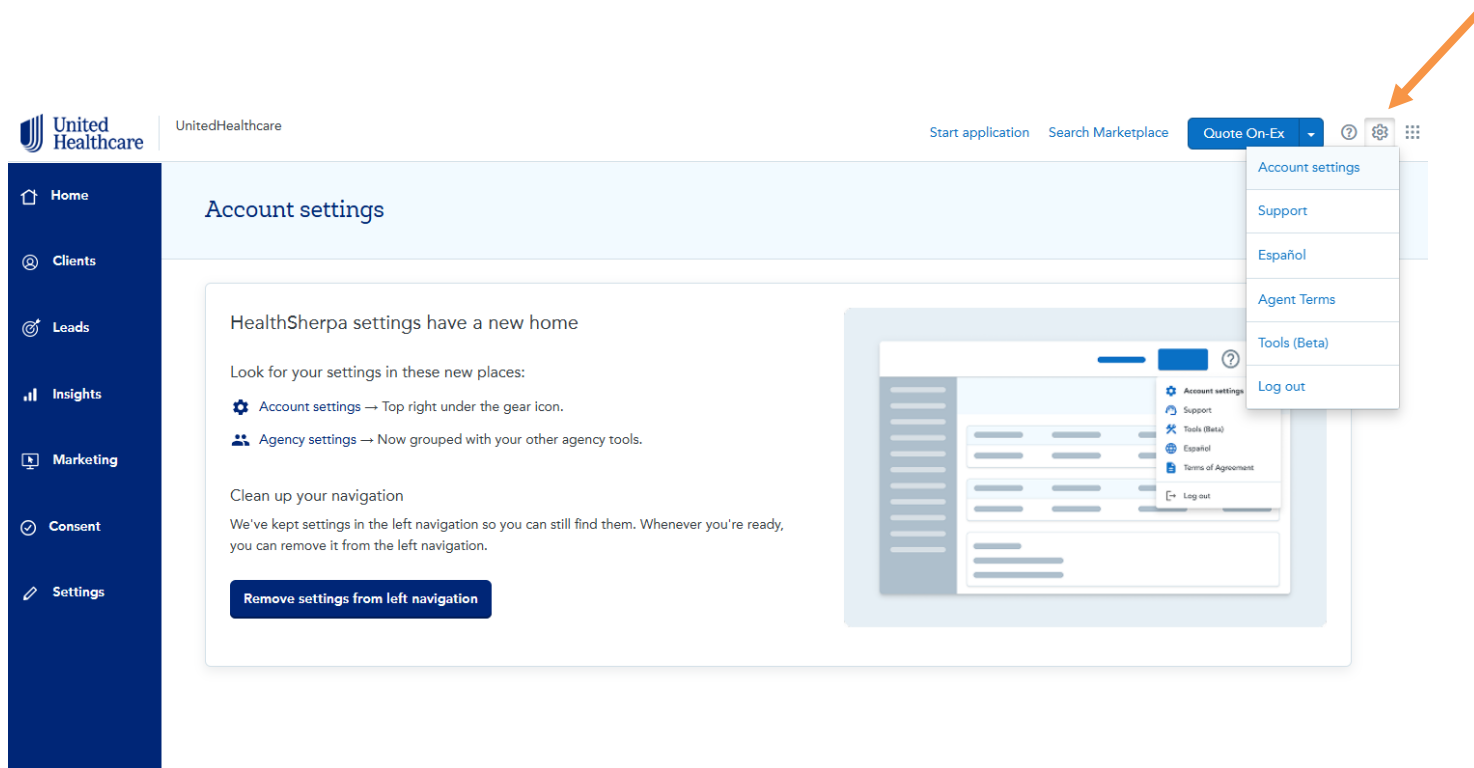


Settings

Ensure your account is setup correctly and completely

Account Settings Tab:

All the information within the account settings tab is captured when the account is created. The account settings information can be found by clicking on the gear icon (top right section of the page).



The screenshot shows the UnitedHealthcare user interface. At the top left is the UnitedHealthcare logo. To its right is the text "UnitedHealthcare". In the top right corner, there are links for "Start application", "Search Marketplace", and a "Quote On-Ex" button with a dropdown arrow. Next to these is a gear icon for settings, which is highlighted by an orange arrow. A dropdown menu is open from the gear icon, showing the following options: "Account settings", "Support", "Español", "Agent Terms", "Tools (Beta)", and "Log out". The main content area is titled "Account settings". It contains a heading "HealthSherpa settings have a new home" and two instructions: "Look for your settings in these new places:" followed by "Account settings → Top right under the gear icon." and "Agency settings → Now grouped with your other agency tools." Below this is a section "Clean up your navigation" with the text "We've kept settings in the left navigation so you can still find them. Whenever you're ready, you can remove it from the left navigation." and a button labeled "Remove settings from left navigation". On the left side of the page is a dark blue navigation sidebar with icons and labels for "Home", "Clients", "Leads", "Insights", "Marketing", "Consent", and "Settings".



HealthSherpa Resources



HealthSherpa Broker Support:

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



PHONE

(888) 684-1373

Mon - Fri

6AM - 4PM PST

*AI Voice Agent available after-hours

PY2026 Hours of Operation:

Open Enrollment Period

(11/1/25 - 1/15/26)

Special Phone Support Days:

- Nov 1 & 2: 6AM - 2:30PM PST
- Dec 6 & 7: 6AM - 4PM PST
- Dec 8, 9, 10, 11, 12: 6AM - 6PM PST
- Dec 13 & 14: 6AM - 4PM PST
- Dec 15: 6AM - 10PM PST



EMAIL

agent_support@healthsherpa.com



CHAT

Chat from dashboard

Mon - Fri

6AM - 2:30PM PST



Thank You!