



HealthSherpa Broker Platform Training

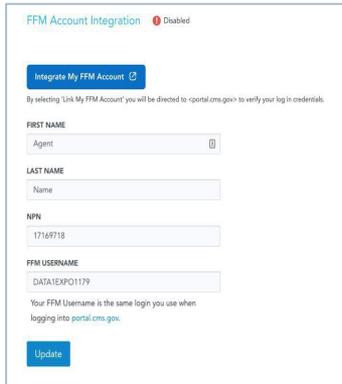
United
Healthcare®



CMS Security

CMS tightens requirements for 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



FFM Account Integration ● Disabled

[Integrate My FFM Account](#)

By selecting 'Link My FFM Account' you will be directed to <portal.cms.gov> to verify your log in credentials.

FIRST NAME
Agent

LAST NAME
Name

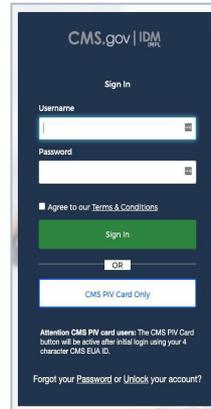
NPN
17169718

FFM USERNAME
DATA1EXPO1179

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

[Update](#)

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



CMS.gov | IDM

Sign In

Username

Password

Agree to our Terms & Conditions

[Sign In](#)

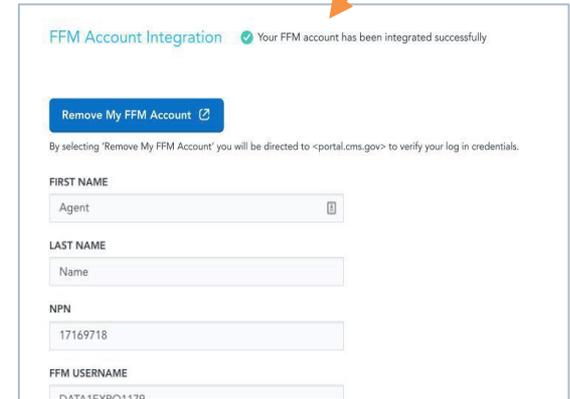
[OR](#)

[CMS PIV Card Only](#)

Attention CMS PIV card users: The CMS PIV Card button will be active after initial login using your 4 character CMS ID.

[Forgot your Password or Unlock your account?](#)

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



FFM Account Integration ✔ Your FFM account has been integrated successfully

[Remove My FFM Account](#)

By selecting 'Remove My FFM Account' you will be directed to <portal.cms.gov> to verify your log in credentials.

FIRST NAME
Agent

LAST NAME
Name

NPN
17169718

FFM USERNAME
DATA1EXPO1179

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



Broker Dashboard Overview

StartApplication

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

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

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

<input type="checkbox"/>	Client	Plan	Gross premium	Net premium	Effective	Created	Documents	Payment	Actions
<input type="checkbox"/>	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
<input type="checkbox"/>	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
<input type="checkbox"/>	Bugs Bunny	Balance Plus Silver 3 Free	\$476.14	\$246.14	2/1/2021	2/8/2021	🚨 Action needed	🚨 Action needed	View

Privacy - Terms



Search Marketplace

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

Search for an application

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



Clients Tab

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

The screenshot shows the United Healthcare Exchange Plans interface. At the top left is the United Healthcare logo and 'Carrier Name Test' with NPN: 17169718. On the right, there are links for 'Start application', 'Search Marketplace', and a 'Quote' button. A dark blue sidebar on the left contains navigation options: Clients (selected), Leads, Insights, Marketing, and Settings. The main content area is titled 'Clients' and includes a search bar. Below the search bar are filters for Carrier, State, Documents, Payment, Archived (Yes/No), and Renewal needed (Yes/No). A '4 clients' summary is shown with a 'Renewal email' button, 'Export', 'Import', and 'View import history' options. A table lists three clients: Dwayne Curtis, Tom Brady, and Bugs Bunny, with columns for Client, Plan, Gross premium, Net premium, Effective, Created, Documents, Payment, and Actions. A 'Privacy - Terms' popup is visible in the bottom right corner.

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

4 clients | Renewal email | Export | Import | View import history

<input type="checkbox"/>	Client	Plan	Gross premium	Net premium	Effective	Created	Documents	Payment	Actions
<input type="checkbox"/>	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
<input type="checkbox"/>	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
<input type="checkbox"/>	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



Test Agent
NPN: 999999

Start application Search Marketplace

Quote



Clients

Leads

Insights

Marketing

Settings

Clients

Search

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

Import

Export

Client

Plan

Test Test

Value Bronze 3 Fre

Group

\$368.91

\$114.91

9/1/2021

9/28/2021

Documents

Expired

Payment

Action needed

As of 09/29/21

Actions

View

Report changes

Access

Archive

Email

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 shows the United Healthcare Exchange Plans interface. At the top, the carrier name is 'Carrier Name Test' with NPN: 17169718. Navigation links include 'Start application', 'Search Marketplace', and 'Quote'. A dark blue sidebar on the left contains menu items: 'Clients', 'Leads', 'Insights', 'Marketing', and 'Settings'. The main content area is for client 'Dwayne Curtis', with a status 'EDE synced a few seconds ago' and buttons for 'Report changes' and 'Change plans'. Below this is a 'Your follow-ups' section with a table of pending actions.

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

Below the follow-ups is a 'Client' section with buttons for 'View application' and 'Report changes', followed by a table of client details.

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
<small>Premium</small>	<small>Deductible</small>	<small>Out of pocket max</small>
<small>Was \$346.24</small>		

[View plan details](#)

Status ! Pending followups

Members Dwayne Curtis

Subscriber ID 0000528320

FFM ID 15950546

Effective: 7/1/2021

Documents [Summary of benefits](#)

[Change plan](#) [Cancel 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

United Healthcare | Test Agent NPN: 999999 | Start application | Search Marketplace | Quote | Renew plan

Sara Smith

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

[View plan details](#) Cancel plan

Status: Pending followups
Members: Sara Smith
Subscriber ID: 000052364
FFM ID: 17526877
Effective: 11/1/2021
Documents: [Summary of benefits](#)

Privacy | Terms

Import Client Book of Business

- Easily upload existing clients into the HealthSherpa Broker dashboard

United Healthcare Exchange Plan | 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](#)



Leads Tab

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

Additional features

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

Leads

Carrier **State** **Status** **Archived**

Showing 1 - 6 of 6 [View import history](#)

Lead	Plan	Gross premium	Net premium	Last active	Status	Actions
Test Test Email (303) 222-2222	Value Bronze 3 Free Visits	\$342.14	\$232.87	3/16/2021	Applying	<input type="button" value="Resume"/>

Lead

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



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
123 EXAMPLE ST TAMPA, FL 33605	2011201102 2021

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



Broker Quoting

Broker Quoting

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

United Healthcare Exchange Plans

Carrier Name Test
NPN: 17169718

Start application Search Marketplace **Quote** ? ⚙️

Clients Search

Carrier State Documents Payment Archived Yes No Renewal needed Yes No

4 clients Renewal email Export Import View import history

<input type="checkbox"/>	Client	Plan	Gross premium	Net premium	Effective	Created	Documents	Payment	Actions
<input type="checkbox"/>	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
<input type="checkbox"/>	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
<input type="checkbox"/>	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 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



Español (801) 123-1234

Save lead

Close

Send to client Print

Your details

Zip code

85001

Household members

1

Who is applying for coverage?

Age

35

Gender

M

F

- Tobacco user
- Parent of child under 19
- Pregnant
- Eligible for other coverage
- Has gotten or is approved to get unemployment income in 2021

Delete

Close

Add spouse applicant

Add dependent applicant

Household income

\$ 25000

Eligibility

Savings

\$335/mo

Cost sharing reduction

CSR

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	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	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	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

The interface is divided into a left sidebar with filters and a main area with plan cards. The filters include:

- Monthly premium max:** A slider set at \$309.
- Max deductible:** A slider set at \$8,550.
- Providers:** A button labeled "Add a doctor or hospital".
- Health Savings Account Eligibility (HSA):** A checkbox labeled "Eligible for an HSA" which is currently unchecked.
- Metal levels:** A checkbox labeled "Catastrophic" which is currently unchecked.

The main area shows "7 plans" with a "Lowest Premium" dropdown. Two plan cards are visible:

Plan 1: UnitedHealthcare Value Bronze 3 Free Visits - HMO (EXPANDED BRONZE)

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

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

Plan 2: UnitedHealthcare Value Bronze 3 Free Telehealth Visits - HMO (EXPANDED BRONZE)

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

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

At the bottom, a dark blue bar contains five plan thumbnails with their respective premiums: \$11, \$7, \$15, \$107, and \$110. A button on the right says "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 <small>was \$246</small>	\$7 for household <small>was \$242</small>	\$15 for household <small>was \$250</small>	\$107 for household <small>was \$442</small>	\$110 for household <small>was \$445</small>
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

Message

Client phone

Link

[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”.

UnitedHealthcare Value Bronze 3 Free Visits - HMO EXPANDED BRONZE

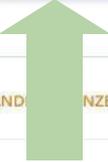
Premium	Deductible	Out-of-pocket max	\$8,550
\$7 /mo <small>was \$342</small>	\$7,500 /yr	Doctor visits	50% after deductible
		Specialist visit	50% after deductible
		Generic drugs	\$20

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

UnitedHealthcare Value Bronze 3 Free Telehealth Visits - HMO EXPANDED BRONZE

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

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





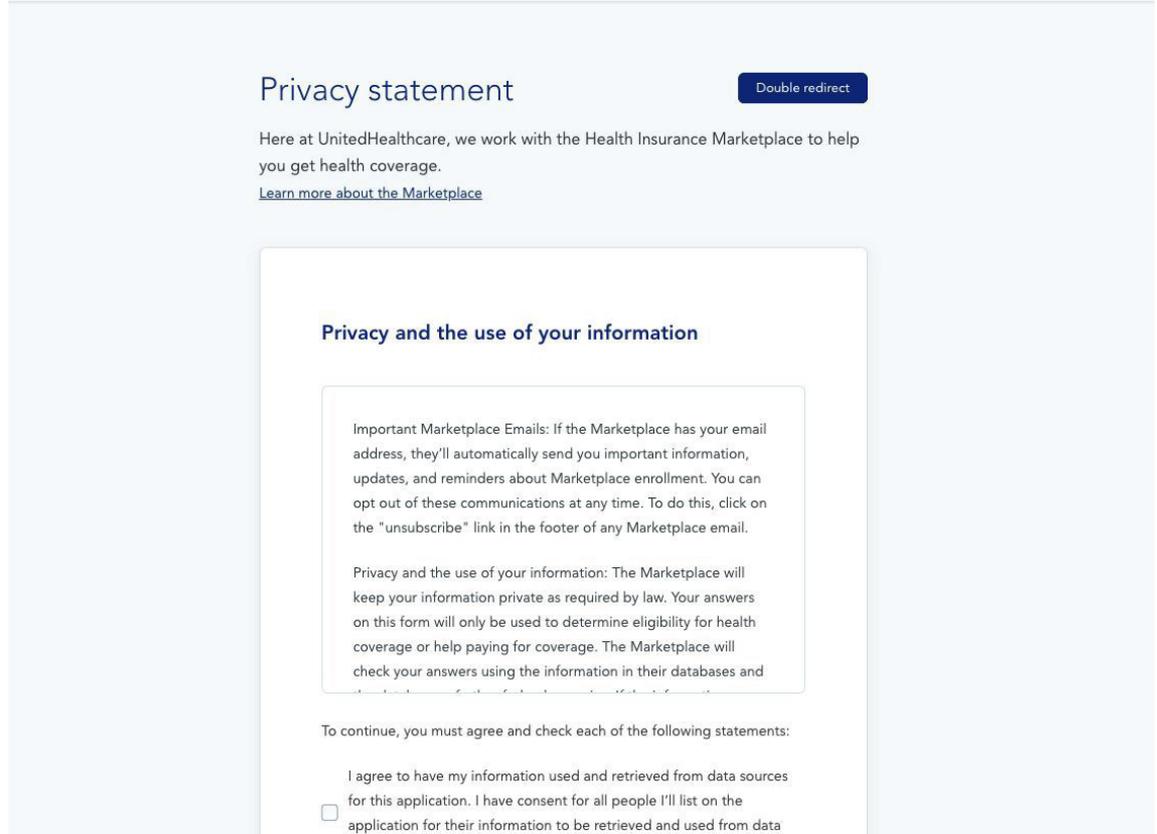
Application Flow

Privacy and use of information

With Enhanced Direct Enrollment the application is completed on HealthSherpa.

Additional Information

- Renewals are prefilled



The screenshot shows a web page titled "Privacy statement" with a "Double redirect" button. The main text states: "Here at UnitedHealthcare, we work with the Health Insurance Marketplace to help you get health coverage." Below this is a link: "[Learn more about the Marketplace](#)". A central box titled "Privacy and the use of your information" contains two paragraphs: "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." and "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...". Below the box, it says "To continue, you must agree and check each of the following statements:" followed by a checkbox and the text "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



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)**

Date of birth **Sex** Male Female

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

Primary contact

Your information

Home address

Contact details

Household

Additional information

Members

Income

Additional questions

Finalize

Primary contact

Home address

Enter your permanent address.

Street address **Apt. / Ste. (Optional)**

City **State** **Zip code**

County

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

Primary contact

Contact details

Email address

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

Phone number **Extension** **Type**

[Add a second phone number](#)

Written language **Spoken language**

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

*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	Remove all
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

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

Finalize

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

Finalize

Print

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

Primary contact

Edit

Full name: 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

Edit

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

Household income

Edit

Primary contact ✓

Household ✓

Additional information ✓

Members ✓

Income ✓

Additional questions ✓

Finalize

Review ✓

Agreements ✓

Tax attestation ✓

Sign and submit

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](#)

Confirmation Page

Additional Information

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

Confirm your plan

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

Plan summary

Coverage begins on 6/1/2021

 Value Bronze 3 Free Visits - HMO ● EXPANDED BRONZE

Premium	Deductible	Out of pocket
\$127.14 / mo <small>\$342.14 list price</small>	\$7,500 / yr	\$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
<input checked="" type="checkbox"/> 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 your UnitedHealthcare 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.



Marketing Tab

Marketing Tab

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 Tab interface. On the left is a blue sidebar with navigation options: Clients, Leads, Insights, Marketing (selected), and Settings. The main content area is titled "Marketing" and features a section for a "Your free, custom ACA Marketing site". This section includes three key features: "Let clients self-enroll" (clients can shop and enroll on their own), "Track their progress" (Leads list tracks shoppers), and "Custom to you" (enrollments use your NPN). A preview of the marketing site is shown, featuring a form for "Easily find and affordable health plan." with fields for Name, Email, and Phone, and a "See plans & prices" button. Below this, instructions state that the site can be shared via Direct Link, which is provided as `https://staging.healthherpa.com/?_agent_id=United`. A green arrow points to the "Copy" button next to the link.



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	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Juan Diaz	33	3232245	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Gerald Gordon	56	2382335	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
David Crandall	111	4365442	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>



Broker Renewal

Broker Renewal

Quickly quote and search applications on the Marketplace

United Healthcare Exchange Plans | Carrier Name Test | NPN: 17169718

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

<input type="checkbox"/>	Client	Plan	Gross premium	Net premium	Effective	Created	Documents	Payment	Actions
<input type="checkbox"/>	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
<input type="checkbox"/>	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
<input type="checkbox"/>	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 clients detail page.

The screenshot displays the 'Client Smith' detail page. On the left is a blue sidebar with navigation icons for Clients, Leads, Insights, Referrals, Marketing, Associates, and Settings. The main header area shows 'Client Smith' with a sync status 'EDE synced 24 minutes ago' and two buttons: 'Report changes' and 'Change plans', both indicated by green arrows pointing down. Below this is a 'Your follow-ups' section with a sub-header 'There are just a few more steps to ensure you are covered.' and a table of follow-up items.

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

Marketplace Documents

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

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



Cancel /Terminate Plan

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

Coverage 2020

Health plan

[AdvanceHealth HMO 6500 73AV - MaricopaFocus Network - HMO](#)
[Blue Cross Blue Shield of Arizona, Inc.](#)

SILVER + CSR

\$4,000	\$6,500	\$157.90
Deductible	Out of pocket max	Premium
		Was \$422.90

[View plan details](#)

Status ⓘ Pending followups

Members Client Smith

Subscriber ID 0000332429

FFM ID 13391898

Effective: 11/1/2020

Documents [Summary of benefits](#)

Carrier phone: (555) 555-5555

Payment phone: (602) 864-4115

Agent of record: NPN 17169718

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

Cancel or terminate

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

Effective date:

[Back](#) [Cancel or terminate your policy](#)

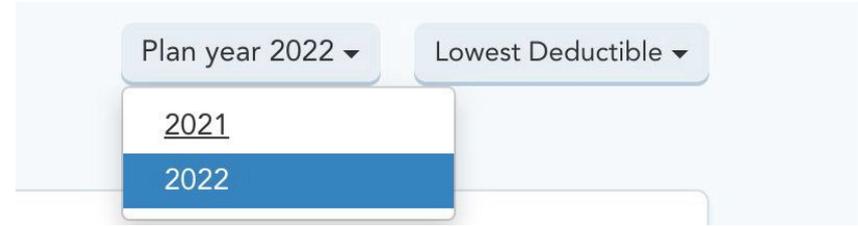


Window Shopping: Brokers

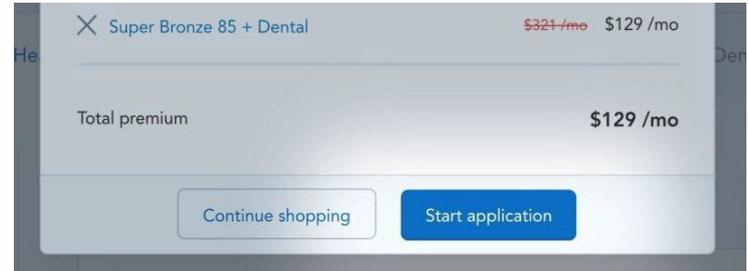
Time period when users can see PY2024 plans prior to 11/1

New Lead

- The broker will quote for plan year 2024 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.



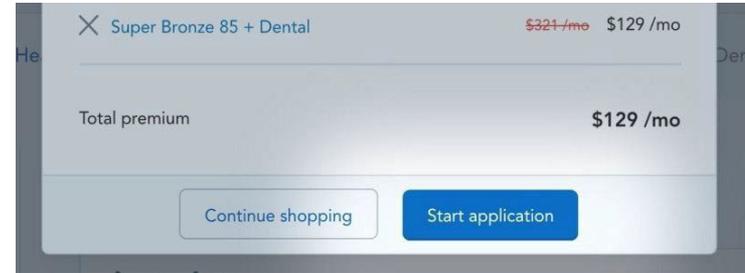
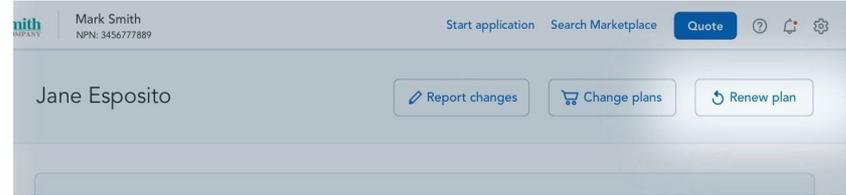
Example from PY2022



Renew Plan

For existing clients who are renewing, the broker can:

- Click “Renew plan” on the client view 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.





Features For PY2024

Enhanced Virtual First display

Make it easier to find VF plans within quoting experience and understand their unique benefits

- New indicator to HealthSherpa plan cards
- Added link to additional VF information
- New language Pre & Post enrollment to emphasize care through Galileo app

Virtual First Plan

United Healthcare UHC Bronze Virtual First (\$3 Rx + Unlimited Free App-based Care) (Disponible en español) - HMO

★ NOT RATED ● EXPANDED BRONZE

Monthly premium	Deductible	Out-of-pocket max	\$8,700
\$182.73	\$7,250	Doctor visits	\$50
was \$451.73		Specialist visit	30% after deductible
		Generic drugs	\$3

Compare [Plan details](#) [Enroll now](#)

Doctor visits

Your Virtual First plan includes unlimited, 24/7 access to quality care through the Galileo app. Get treated for anything from everyday issues to complex conditions with Galileo's easy-to-use app.

In network ▾

	Before deductible is met	After deductible is met	
Primary care visit	Full price	Free	▾
Specialist visit	Full price	Free	▾
Preventive care visit	Free	Free	▾

Prescription drugs

Prescription coverage is based on which category a drug falls into. To see how this plan categorizes

UHC Bronze Virtual First (\$3 Rx + Unlimited Free App-based Care) (Disponible en español) - HMO

Plan costs

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

Monthly premium	\$182.73
Deductible	\$7,250 per person
Out-of-pocket max	\$8,700 per person
Network type	HMO
Metal tier	Expanded Bronze
Overall rating	Not Rated

Official documents

- [Summary of benefits and coverage \(SBC\)](#)
- [Plan formulary](#)
- [Provider list](#)
- [Plan brochure](#)
- [What is a Virtual First Plan?](#)

Non-Filled Benefits

Refreshed UX experience to highlight new 2024 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
 - Ex: Virtual First benefit will only show for virtual plans

Additional plan benefits and features

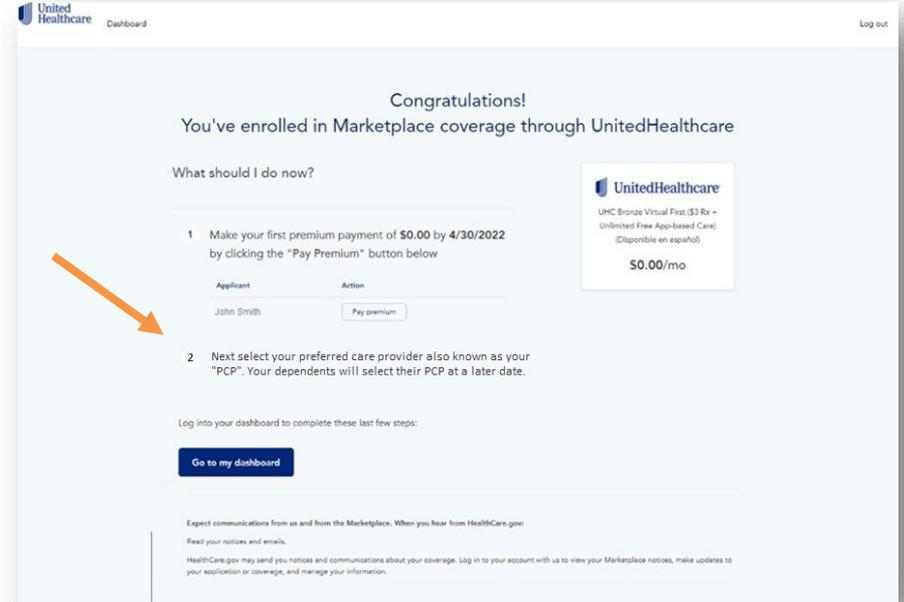
In addition to the standard benefits offered, your plan offers the additional benefits below.

- galileo | Virtual First with Galileo
- Earn A \$100 Gift Card
- Walgreens Prescriptions
- Walgreens Discount
- 24/7 Virtual Urgent Care
- Adult Dental
Adult dental coverage included in your plan with a \$0 copay for 2 routine visits per year and preventive care with an annual maximum of \$1,000
- Adult Vision
Adult vision coverage included in your plan with a copay as low as \$10 for exams and eyewear up to \$130
- Digital Fitness Classes
- AARP One-Year AARP Membership

PCP Copy On Enrollment Success Page

New callout on the HealthSherpa confirmation page for subscribers to add their PCP

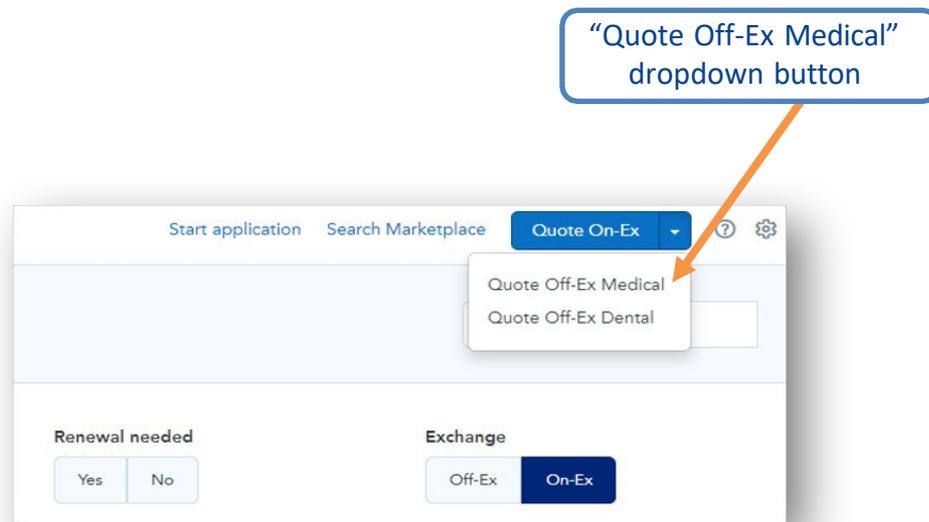
- Helps sets expectations for consumer as they leave HealthSherpa to go to myUHC.com



Off-Exchange Medical Plans

Off-Exchange Capabilities:

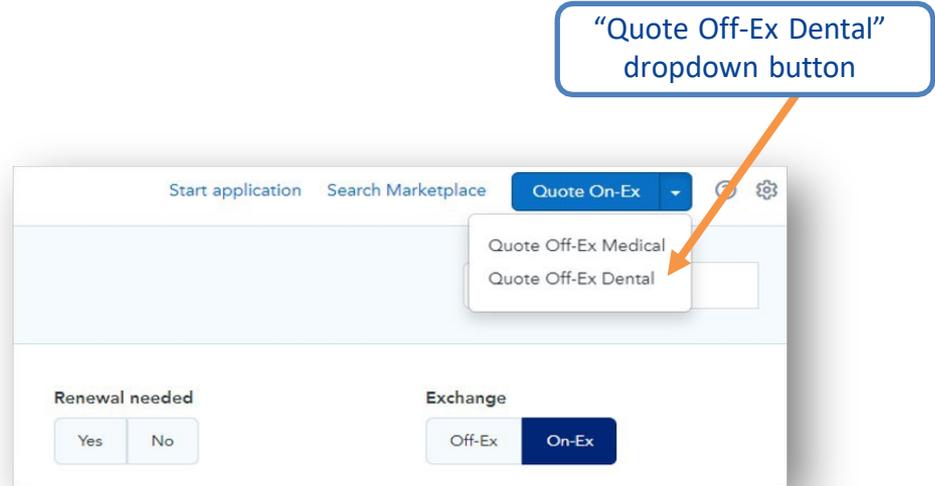
- Available to Brokers, Telesales, and Direct to Consumers
- Same basic flow as On-Exchange
 - Will leverage Pay Now + PCP selection capability (Outside Virtual First and Kelsey-Seybold plans)



Off-Exchange Dental Plans

Off-Exchange Capabilities:

- Available to Brokers, Telesales, and Direct to Consumers





Updates For PY2024

Platform Improvements

Agent Consent:

Eligibility summary

Name	Covered by this plan	Next step
 Jane Fetterman	Yes	Enroll
 Fernando Garcia	Yes	Enroll

Consent

[Download consent form](#)

You are required to collect written or verbal consent from your client before completing an enrollment. You can maintain this proof of consent in your own records or in your HealthSherpa dashboard.

How would you like to maintain proof of consent?

Upload my consent files to HealthSherpa

Accepted file types include text, audio, or image files (jpeg, png, pdf, txt, or mp3). Files must be smaller than 1 MB.

I already have proof of consent in my own records

Upload consent files later

Not ready to enroll?

Platform Improvements

Agent Consent:

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

The screenshot displays the 'Plans 2023' interface. At the top right, there is a 'Renew' button. The main content area is divided into two columns. The left column features a card for 'Health plan Silver HMO 1250' by 'Ambetter from Magnolia Health', which is a 'BRONZE' plan. It lists a premium of '\$175.45' (with a note 'Was \$1,000'), a deductible of '\$1,250', and an out-of-pocket maximum of '\$5,250'. A 'View full plan details' link is at the bottom of the card. The right column lists plan details: Status (Enrolled), Members (Jene Esposito, Danny Esposito), FFM ID (872490), FFM Subscriber ID (32322323214), Effective date (1/1/2021), Documents (Summary of Benefits), Carrier phone ((916) 456-7778), and Payment phone ((916) 456-7778). Below these details are buttons for 'Pay premium', 'Change plan', and 'Cancel plan'.

Below the plan details is a section titled 'Consent records', which is circled in red. It contains a table with the following data:

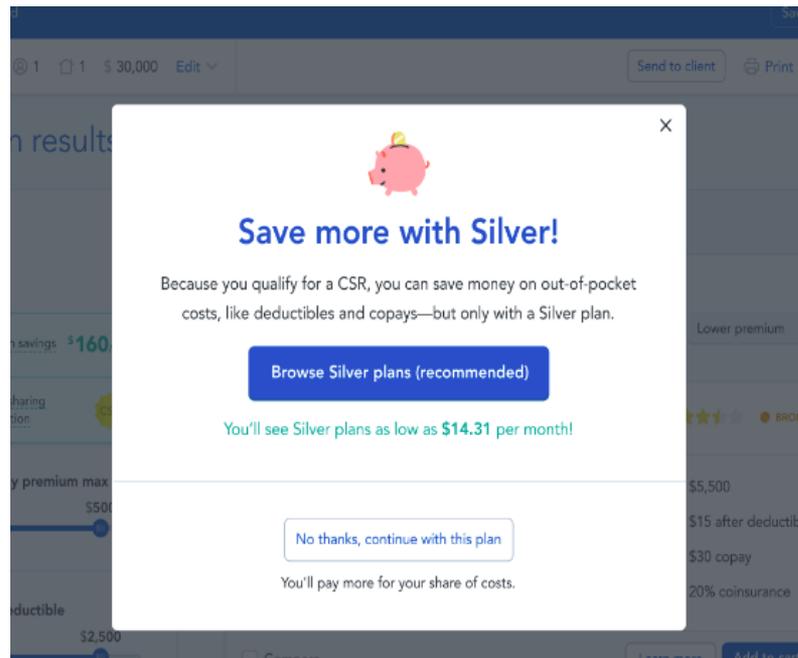
Method	Collection date	Consent status	Plan year	Download files	Action
Agent upload	01/03/2023	Collected	2023	Consent_01/02...	-

At the bottom of the interface, there is a section for 'Marketplace notices'.

Platform Improvements

Bronze-to-Silver Nudge:

- CMS Requirement
- Appears when the user selects (either by attempting to enroll or adding to a cart) a non-silver plan (e.g., a Bronze plan) when they are eligible for CSR which would make a Silver plan a better option.
- If the user selects “Browse Silver Plans”, they will be taken to a Silver compare screen.



The screenshot shows a web application interface with a dark blue header. A modal window is centered on the screen, featuring a pink piggy bank icon with a gold coin on top. The modal text reads: "Save more with Silver!" in bold blue font, followed by "Because you qualify for a CSR, you can save money on out-of-pocket costs, like deductibles and copays—but only with a Silver plan." Below this is a prominent blue button labeled "Browse Silver plans (recommended)". Underneath the button, it says "You'll see Silver plans as low as \$14.31 per month!". At the bottom of the modal is a white button with a blue border labeled "No thanks, continue with this plan", with the text "You'll pay more for your share of costs." below it. The background of the application is dimmed, showing a sidebar with "savings \$160" and a main content area with "Lower premium" and "You'll pay more for your share of costs.".



Settings

Ensure your account is setup correctly and completely

Settings Tab

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

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

Payment Emails

Send automatic Payment Reminder emails to your clients.

On Off

Client Notification Emails

Receive a daily summary email of your clients' pending followups

On Off



United Healthcare Exchange Plans

Carrier Name Test
NPN: 17169718

Start application Search Marketplace Quote ?

Account settings

Login

To change your password, please enter your current password.

EMAIL ADDRESS
noreply+unitedagent@healthsherpa.com

CURRENT PASSWORD

NEW PASSWORD

CONFIRM NEW PASSWORD

Update

FFM Account

These will be transmitted on the eligibility and insurer applications.

FIRST NAME
Carrier name

LAST NAME
Test

NPN
17169718

FFM USERNAME
DATA1EXPO1179

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

Update



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.

PY2024 Hours of Operation:

Open Enrollment Period Mon - Fri
(11/1/23 - 1/15/24) 6AM - 5PM PST

Special Enrollment Period Mon - Fri
(1/16/24 - 10/31/24) 6AM - 4PM PST



PHONE

(888) 684-1373



EMAIL

agent_support@healthsherpa.com



CHAT

Chat from dashboard



Thank You!