



HealthSherpa Platform OEP 2019

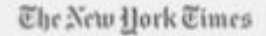
With HealthSherpa's Enhanced Direct Enrollment (EDE) technology you have complete control over the enrollment experience

Completely FREE for ACA agents

Quoting, enrollment, marketing

Post enrollment tools and enhanced EDE reporting

As seen on:



We are the largest private agent / broker enrollment platform in the US

1.2 million
lives

24,000
brokers

4,000
agencies

6 billion
gross annual premiums

Easily find an affordable health plan

Enter your info to compare plans

Zip code*

Name

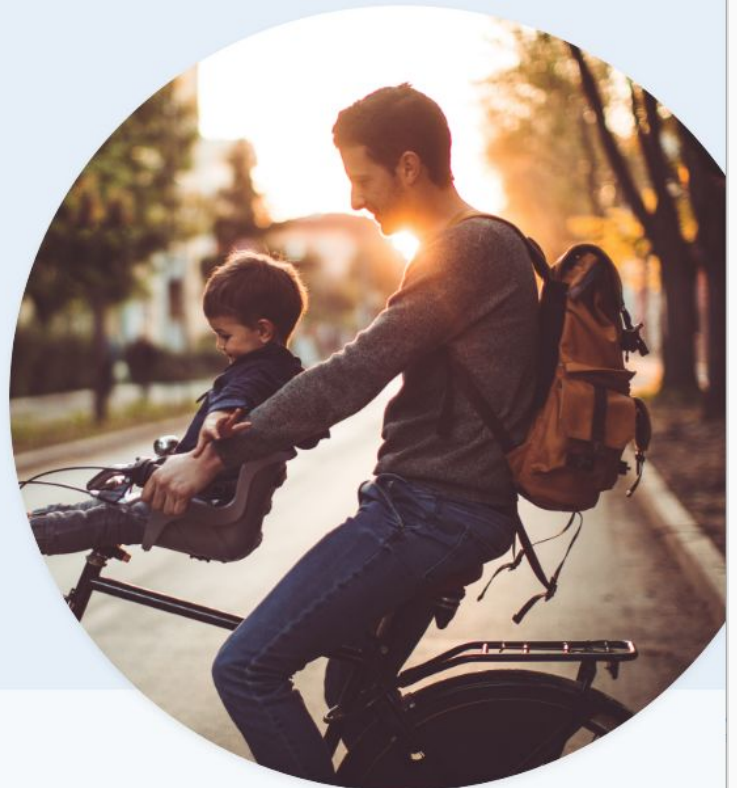
Email

Phone number

See plans and prices

* Required field

DISCLAIMER: By submitting your information you agree that Your Agency Name may contact you at the above-listed email or phone number. I understand that consent is not a condition of purchase.



For more information, email us at agent_sales@healthsherpa.com or call us at (844) 242-1036

Quick & easy quoting + eligibility determination

Key Features

- Quickly add dependents
- Adjust income
- Eligibility determination

The screenshot shows a user interface for entering details and checking eligibility. On the left, under 'Your details', there are fields for 'Zip code' (32003), 'Household members' (2), and 'Household income' (\$ 32000). Below these are two 'Applicants' sections. Each applicant has fields for 'Age' (35 and 32) and 'Gender' (M and F). There are checkboxes for 'Tobacco user', 'Parent of child under 19', and 'Eligible for other coverage', along with 'Delete' and 'Close' buttons. An 'Add dependent' button is at the bottom. On the right, the 'Eligibility' section shows a 'Savings' of \$706/mo and a 'Cost sharing reduction' (CSR) icon.

Plan shopping

Key Features

- Premium Sliders
- Share plans with your clients
- Network and metal tier filters
- Provider search

The screenshot displays a 'Plan shopping' interface. On the left, there are 'Monthly premium max' and 'Max deductible' sliders, both set to \$7,350. Below are 'Providers' and 'Carriers' sections. The 'Carriers' section has a text box and three checkboxes: 'Ambetter from Sunshine Health' (checked), 'Florida Blue (BlueCross BlueShield FL)' (checked), and 'Florida Blue HMO (a BlueCross BlueShield FL company)' (unchecked). On the right, there are '23 health plans'. Two plans are visible: 'Ambetter Balanced Care 5 (2018) - EPO' with a deductible of \$5,350, out-of-pocket max of \$5,350, and monthly premium of \$177; and 'Ambetter Balanced Care 4 (2018) - EPO' with a deductible of \$5,250, out-of-pocket max of \$5,250, and monthly premium of \$188. Each plan card includes a list of costs: Doctor visits, Specialist, Generic drugs, and ER visit. Buttons for 'Compare', 'Plan details', and 'Enroll now' are present for each plan.



HealthSherpa Single Site enrollment

Key Features

- Applications hosted on HealthSherpa without redirect to healthcare.gov
- Keep enrolling when HC.gov goes down
- 5x conversion for self enrolling clients using Single Site

Primary contact information

First name Middle (Optional) Last name

Suffix (Optional) Email address

Phone number Phone type

Preferred written language (Optional) Preferred spoken language (Optional)

Is [name] applying for coverage?
 Yes No

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

Pre-filled renewal applications

Key Features

- Find previous Marketplace applications
- Renewals in under 5 minutes
- Renewal applications are prefilled with previous year's information

Find an application

To find a client's existing Marketplace application, enter their information below. If we can't find the applicant, you'll be able to start a new application for them.

Search by Social Security number and date of birth

Social Security Number (Required) Date of birth (Required)

Or search by name, date of birth and more

Results

1 result found

Applicant	Date of birth	Address	Coverage year	
Jennifer Smith SSN: ***-**-2424	02-23-1980	12 Sylvan Ave Newark, NJ 07071	2018	<input type="button" value="Update"/>

Not the results you were expecting? [Create a new 2018 application](#)



Know where every app stands with our automated to-do lists

Key Features

- We Identify follow ups for each application
- Complete them directly from your HealthSherpa Dashboard
- Automatically updates as you complete the follow ups

Jane Esposito Change plan

Client Coverage Notes

Client to do list

There are just a few more steps to ensure your client locks in their coverage.

To do's	Status	Deadline
<input type="checkbox"/> Pay premium for health plan	Incomplete	5/30/18
<input checked="" type="checkbox"/> Verify your Special Enrollment	Complete	5/30/18
<input checked="" type="checkbox"/> Verify your citizenship	Complete	6/2/18

Client

Applicant	Gender	Tobacco	Date of birth	SSN	Eligibility
Jane Esposito	Female	No	02/11/1981	123-13-3134	Subsidy + 73% CSR
Dan Esposito	Male	No	05/22/1980	145-46-3081	Subsidy + 73% CSR

Use our enhanced email tools for quick efficient follow-ups

Key Features

- identify follow ups for your entire book
- Email them all at once
- Or let our automated drip campaigns remind your clients to complete their follow ups

Client list to-do's

Bulk email your clients to get them to complete these last few to-do's and ensure coverage.

[Hide this list](#)

To do's	Deadline	Action
<input checked="" type="checkbox"/> 24 clients need to make a payment	4/28/18	Email
<input checked="" type="checkbox"/> 8 clients need to verify income	5/30/18	Email

Document status: Documents needed | Payment status: Payment needed | Carrier: All carriers | State: All states | Renewal needed: Yes No

Enrolled: Yes No | Archived: Yes No

14 clients [Email](#) [View import history](#) [Import](#) [Export](#)

Primary Applicant	Plan	Premium	Effective	Enrolled	Documents	Payment	Actions
<input type="checkbox"/> Jane Esposito	Health Plan HMO 5000	\$138	05-01-17	No	Pending	Payment needed	Action
<input type="checkbox"/> Michale Smith	Health Plan EPO	\$231	05-01-17	No	Documents	Payment	Action



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Upload documents directly from HealthSherpa

Key Features

- We identify what documents are needed
- Upload documents directly from HealthSherpa
- We will let you know when they have been approved

Verify your citizenship ! Incomplete

Finalize your enrollment
Once you submit your documents, we'll email you to let you know if the documents have been accepted & when your enrollment is finalized.

Submit by **5/30/18**, or risk losing your coverage.

Submit documents for the below:

1. Verify your citizenship

Select document type Select file to submit

Finalize your enrollment
You've already completed this to do. Check your to do list and complete any open items to ensure your coverage for 2018.

Your documents have been approved!
You don't have to do anything else.

Document	Submitted	Status
Lost coverage document	May 22, 2018	✓ Approved
Moved document	May 22, 2018	✓ Approved

Never miss another notice with our message center

Key Features

- Our message center keeps you up to date on follow up items
- Track updates and changes to applications in real-time

Message center Manage settings

Inbox (10 messages)

Message	Deadline	Action
Cat Perez's citizenship has been verified November 14, 2018	-	View
Cat Perez needs to pay their premium November 14, 2018	December 15, 2018	Pay
Cat Perez needs to verify citizenship November 10, 2018	December 25, 2018	Verify
Ning Liang needs to pay their premium November 9, 2018	December 15, 2018	Pay
Read (6 messages)		
Jan Fontain needs to pay their premium November 9, 2018	December 15, 2018	Pay



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Get a branded website for online enrollment

Key Features

- Branded to you
- Generate leads
- When clients enroll themselves online you become agent of record
- Customize your landing page and images

Easily find an affordable health plan

Enter your info to compare plans

Zip code*

Name


Email

Phone number

See plans and prices

* Required field

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Stock photo options



Compare, share and collaborate with clients

Key Features

- Save progress
- Compare plans
- Share them with clients

HealthSherpa (855) 935-5622 Sign in Save progress

Plan results

Share plan list

Email anyone a direct link to this page

To:

Message:

Link:
[Copy link to clipboard](#)

Your name:

Send

Horizon Blue Cross of



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Client Referral Program

Get paid for carriers you are not appointed with

How it works:

- Turn the referral feature on
- Enroll a client with a non-appointed carrier
- HealthSherpa becomes Agent of Record
- HealthSherpa pays you

Referrals

50 Total referrals \$250 Referrals paid \$1250 Total referral value

Refer clients to HealthSherpa and we'll pay you \$25 per successfully submitted application for carriers you are not appointed with. Track your referrals here.

[How it works](#)

Setting
By turning this on, HealthSherpa will track & pay you for non-appointed applications.

On Off

Referral ID	Referral name	Submission date	Carrier	Status	Amount
1213444	Lola Perez	11/11/17	Molina Healthcare	Paid 12/11/18	\$25
1499184	Michelle Idrovo	11/10/17	Ambetter FL	Paid 12/11/18	\$25
1479745	Chris Klein	11/10/17	Ambetter FL	Paid 12/11/18	\$25

