HealthSherpa

HealthSherpa Platform Updates

Fall 2022

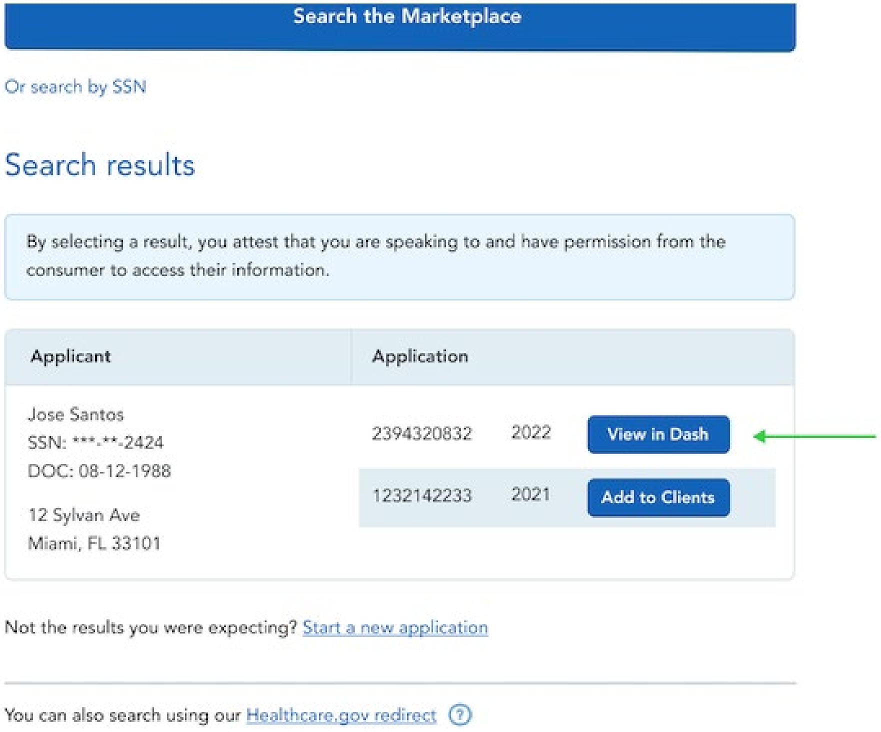
Agenda

- Account changes
- Quoter improvements
- Shopping improvements
- Application improvements
- Recap of 2021 launches
- Account management
- Technical changes
- PY23 Renewals
- Resources
- Q&A

Account Changes

Avoid duplicates in your client list

- In the event that you Search & Claim a client who already appears in your "Clients" tab, you will now be able to update the application and view it instead of creating a duplicate by selecting the "View in Dash" button.
- An Agent may need to do a Search & Claim on one of their existing applications if they want to make sure they have the most up to date information (e.g. payment statuses, document statuses, premium amounts) in their HealthSherpa account.



Bulk Archive Capabilities

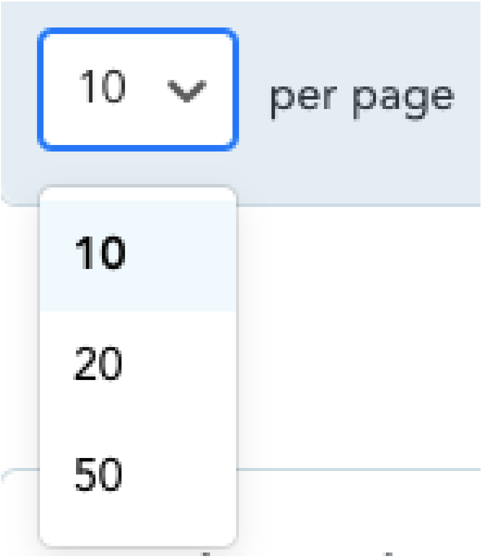
- Agents can now archive multiple clients or multiple leads at a time
- Select checkboxes next to customer names then choose ‘archive’

4 selected of 104 | Archive | Import | Export

	Client	Plan	Gross	Net	Effective	Created	Documents	Payment	Actions
☐	Linda Belcher	Bronze 8700	$720.03	$320.03	7/1/2022	6/9/2022	Action needed Due 09/07/22	Action needed As of today	View
☑	Linda Belcher	Bronze 8700	$695.98	$395.98	7/1/2022	6/9/2022	Action needed Due 09/12/22	Action needed As of 06/09/22	View
☐	Roy Williams	BlueCare EPO Bronze	$448.21	$106.21	7/1/2022	6/7/2022	Action needed Due 09/05/22	Action needed As of today	View
☑	Bob Belcher	Bronze 8700	$969.50	$317.50	6/1/2022	5/19/2022	Action needed Due 08/17/22	Action needed As of 06/09/22	View
☑	Testy Test	Bronze 8700 + $0 Outpatient Mental…	$829.23	$532.23	6/1/2022	5/16/2022	Action needed Due 08/17/22	Action needed As of 05/19/22	View
☑	Pending Effectuation	Ambetter Essential Care 1	$308.66	$6.66	6/1/2022	5/12/2022	Action needed Due 08/10/22	Action needed As of 05/16/22	View

View more rows at once!

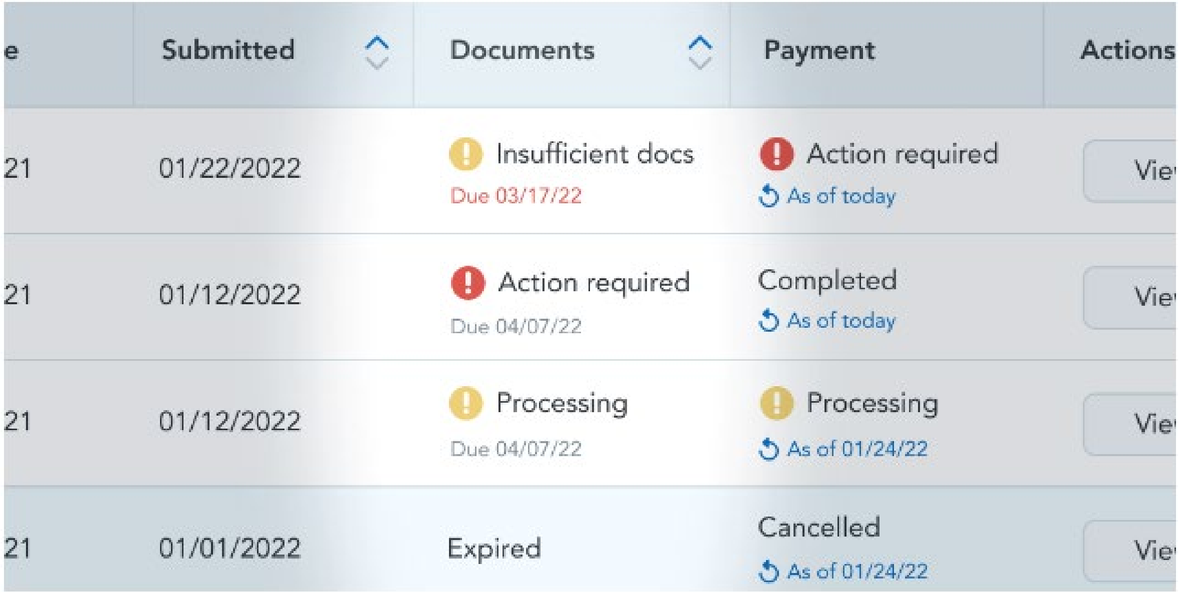
- At the bottom of the 'Clients' and 'Leads' tables, you can now select to see 10, 20 or 50 rows on one page



- When you select a new row amount, it will scroll you to the top of the page and start on page 1. If you refresh the page, it will default to 10 rows

Documents Column

- Realtime document statuses on your Client List – no more clicking "Refresh" links!
- In your Clients table, you will now see due dates for your clients’ follow-up documents



e	Submitted	Documents	Payment	Actions
21	01/22/2022	Insufficient docs Due 03/17/22	Action required As of today	Vie
21	01/12/2022	Action required Due 04/07/22	Completed As of today	Vie
21	01/12/2022	Processing Due 04/07/22	Processing As of 01/24/22	Vie
21	01/01/2022	Expired	Cancelled As of 01/24/22	Vie

Follow-Up Documents

- You can now also sort the Documents column by due date. Rows in the Documents column will sort based on date and status
- If you sort to see clients with the closest due dates first, the statuses will sort in this order:
  - Action Needed
  - Insufficient Documentation
  - Processing
  - Expired
  - Completed
  - Not required

Click here for descriptions of what each of these statuses mean and directions on how to upload follow-up documents.

Upload documentation on Healthsherpa

After clicking the ‘Verify’ button, you’ll be taken to a page where you can upload the appropriate documentation for the client.

- This page includes information about what documents satisfy the requirement.

Acceptable documents to verify your Income

Close

Here are the documents you can submit to confirm your yearly income:

- 1040 federal or state tax return. Note: It must contain your first and last name, income amount, and tax year.
- Wages and tax statement (W-2 and/ or 1099, including 1099 MISC, 1099G, 1099R, 1099SSA, 1099DIV, 1099SS, 1099INT). Note: It must contain your first and last name, income amount, year, and employer name (if applicable).

Bulk Renewal Email Improvements

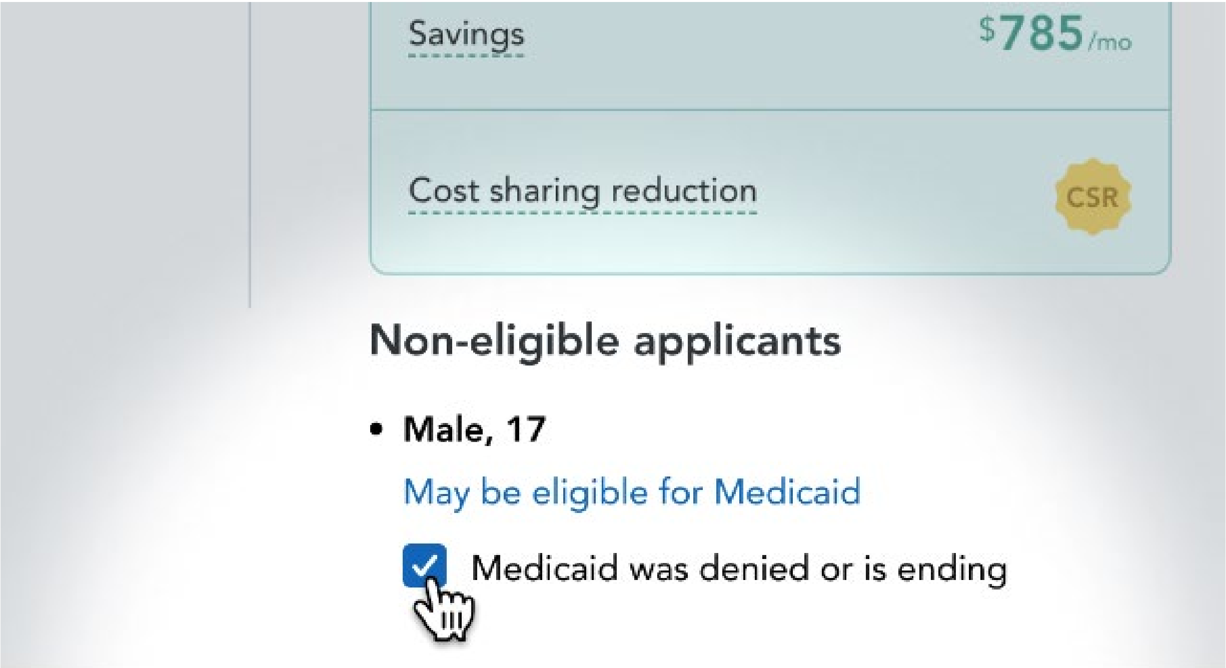
- You can send an email to every clients who hasn't renewed through the "Renewal email" button at the top of your Clients table
- We've made the following improvements to let agents better customize their outreach:
  - Editable email subject line
  - Toggle the call to action button on or off
- Please note you can only send a Renewal email to the same client 3 times in a week

Read our help article for more information

Quoter improvements

Medicaid/CHIP Denied Toggle

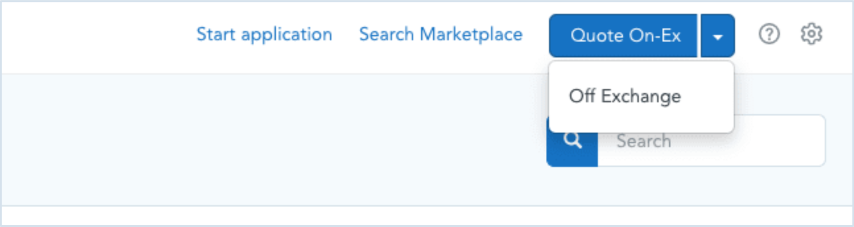
In the past, if a member of your client's household was eligible for Medicaid/CHIP, HealthSherpa would take them out of the quote. Now, you can keep applicants on a quote who were denied Medicaid or CHIP.



Shopping improvements

Off-exchange expansions

- Currently live for select carriers in AZ, CO, FL, GA, IL, IN, KS, MI, MS, MO, NV, NH, NJ, NM, NC, OH, PA, TN, TX, UT, and VA



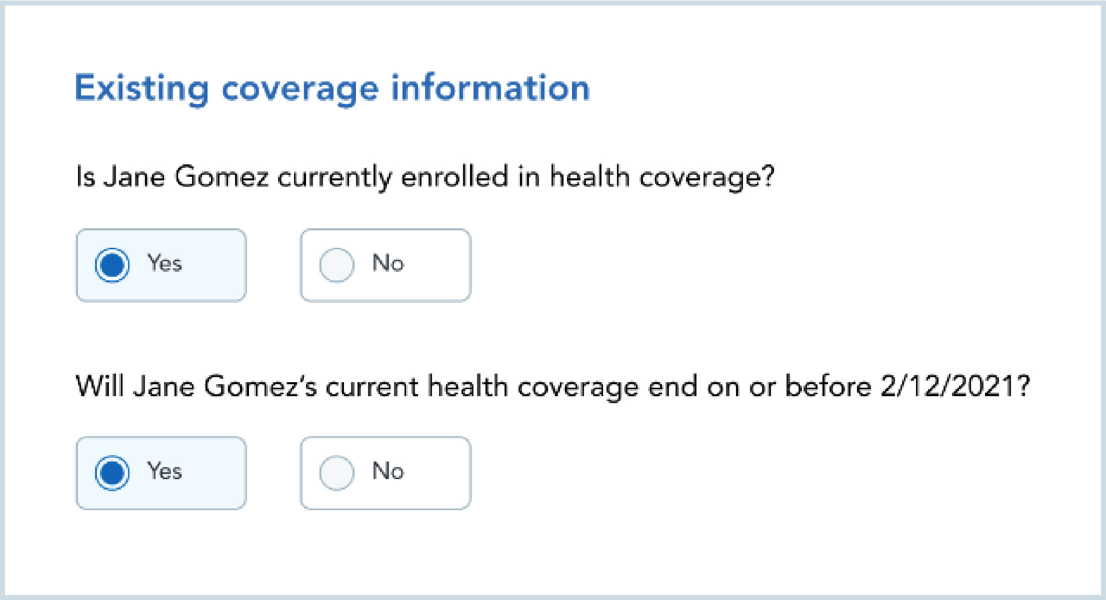
- Off-exchange shopping is a good option for:
  - Those who make too much to qualify for premium tax credits on-exchange could get Silver plans that are up to 30% cheaper off-exchange!
  - Those offered both an Individual Coverage HRA and Cafeteria (salary deduction) benefit for the cost of premiums.
- If your client is interested in savings through premium tax credits or Medicaid / CHIP, you should check their eligibility on-exchange first.

Read more about off-exchange plans on HealthSherpa here.

Application improvements

Existing coverage question

To improve clarity, we've added a second question to the existing coverage section in the application.



Dependents aging off applications

- In situations where a newly-independent member* is aging off of an application and needs to create their own, they are now able to complete their application on HealthSherpa without redirecting to HealthCare.gov
- Specifically, the newly-independent member's application on HealthSherpa will not erroneously sync with their parent's application from the prior year
- Prior to starting the new application, remember to remove the newly-independent member from the previous application
- This can be done by visiting the Who's Applying for Coverage page via Report Changes, removing the member, and then resubmitting the application

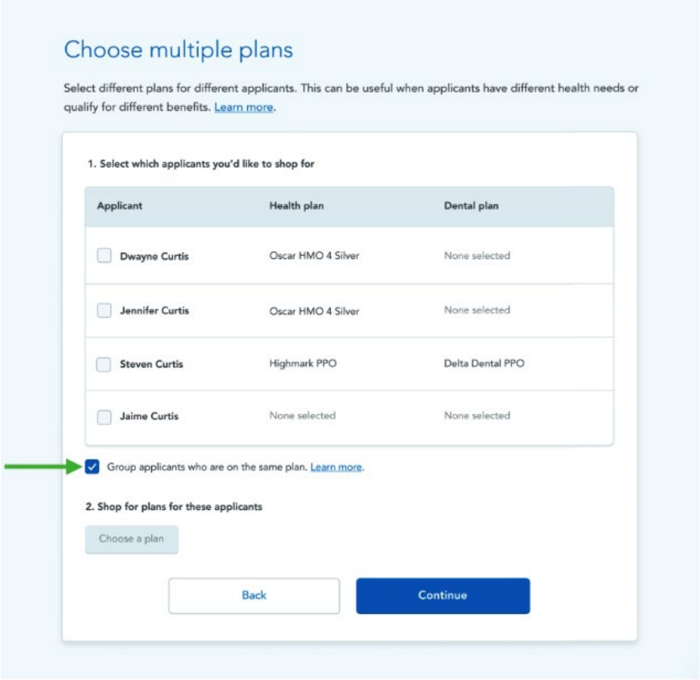
**Defined as an individual who was a dependent during the prior Open Enrollment period, but are now independent (for e.g. turning 26 during the Open Enrollment period).*

Multiple Enrollment Groups (Split Policies) Update

Agents can now opt out of grouping applicants who've chosen the same plan. This feature was designed to support the needs of Agents in the following scenarios:

- **When one applicant is AI/AN, and the others aren't** — the AI/AN applicant can retain their AI/AN benefit ($0 deductible/OOP)
- **When one applicant qualifies for CSR, and the others don't** — the CSR eligible applicant can keep their extra savings
- **When applicants want separate deductibles, etc.** — the applicants can avoid having a family deductible

To opt out of grouping applicants who choose the same plan, remove the checkmark.

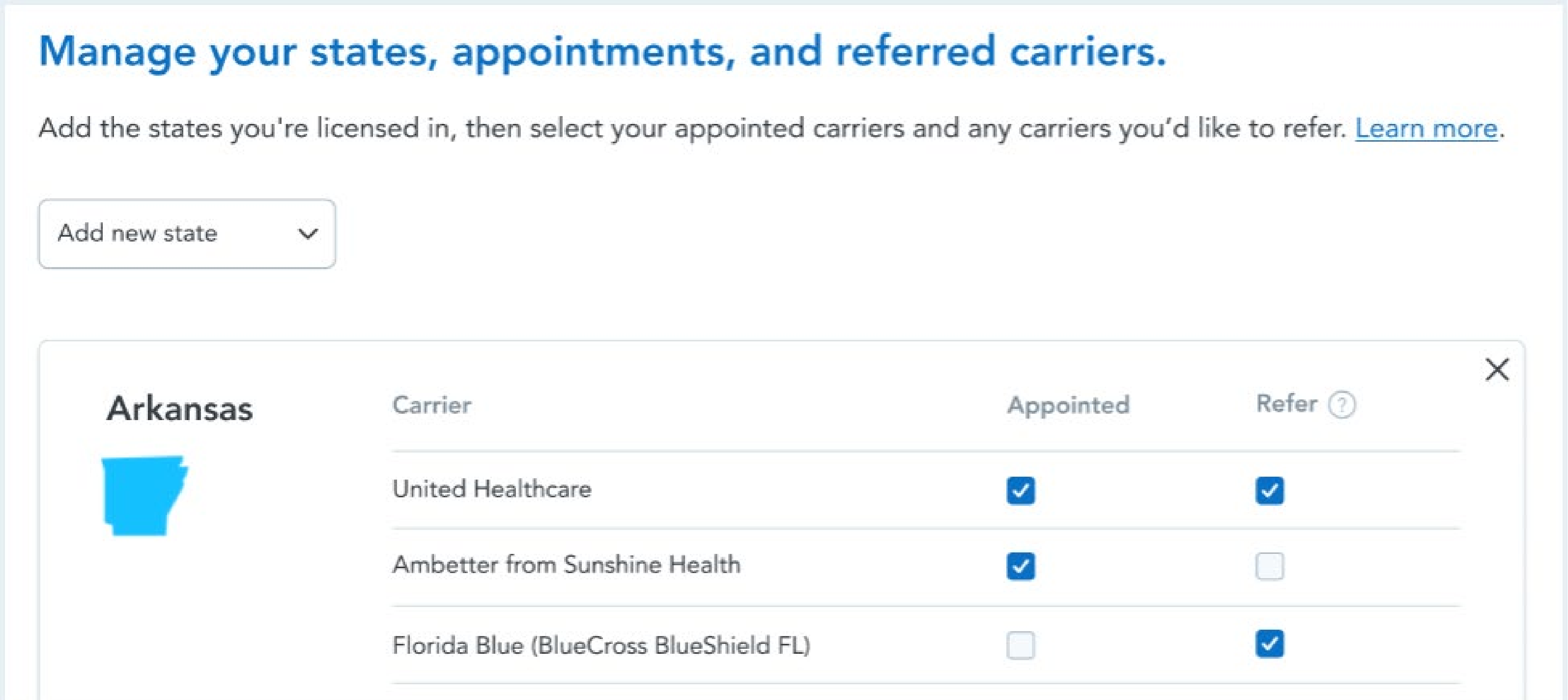


[Read more about multiple enrollment groups here]

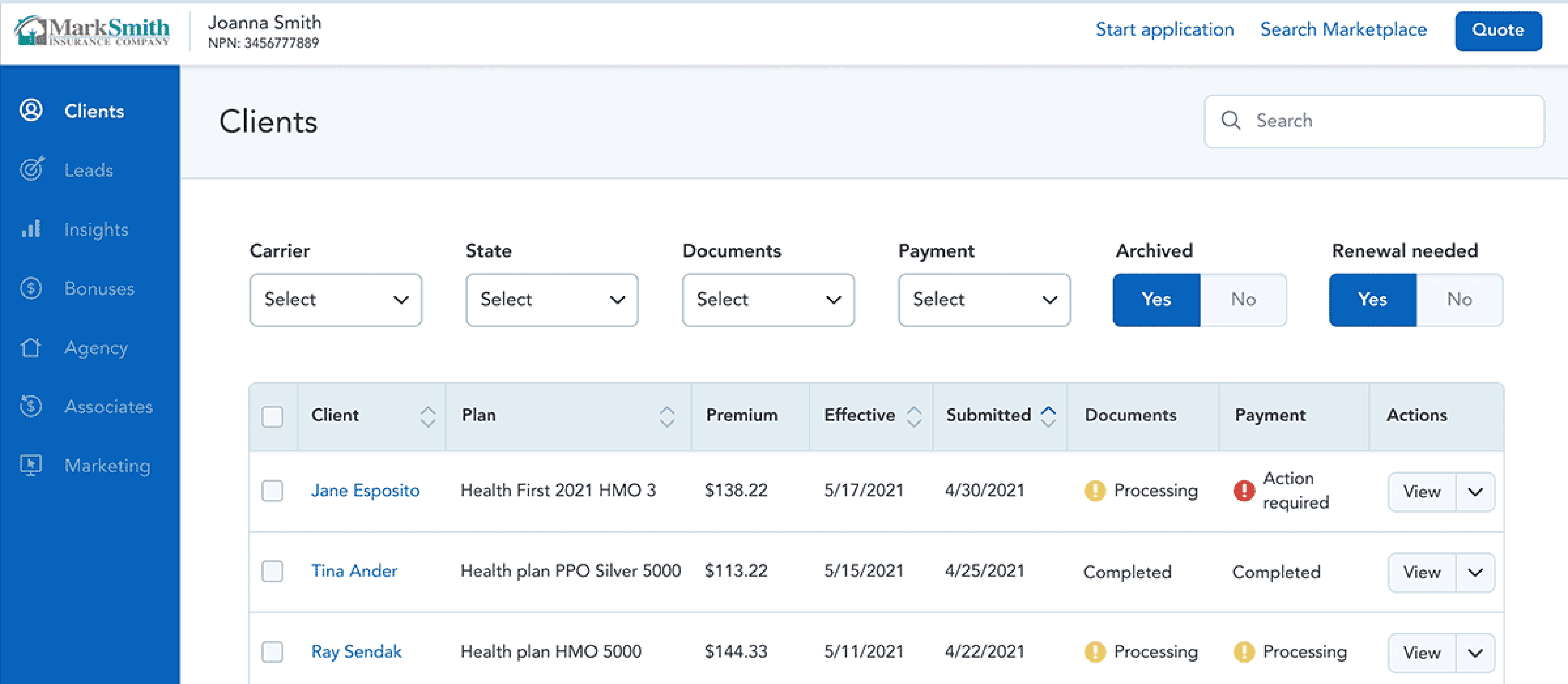
Recap of 2021 Launches

Referral flexibility on the appointments page

- Only visible if participating in HealthSherpa's Referral Program
- Select carriers you want to refer — [learn more about these settings]

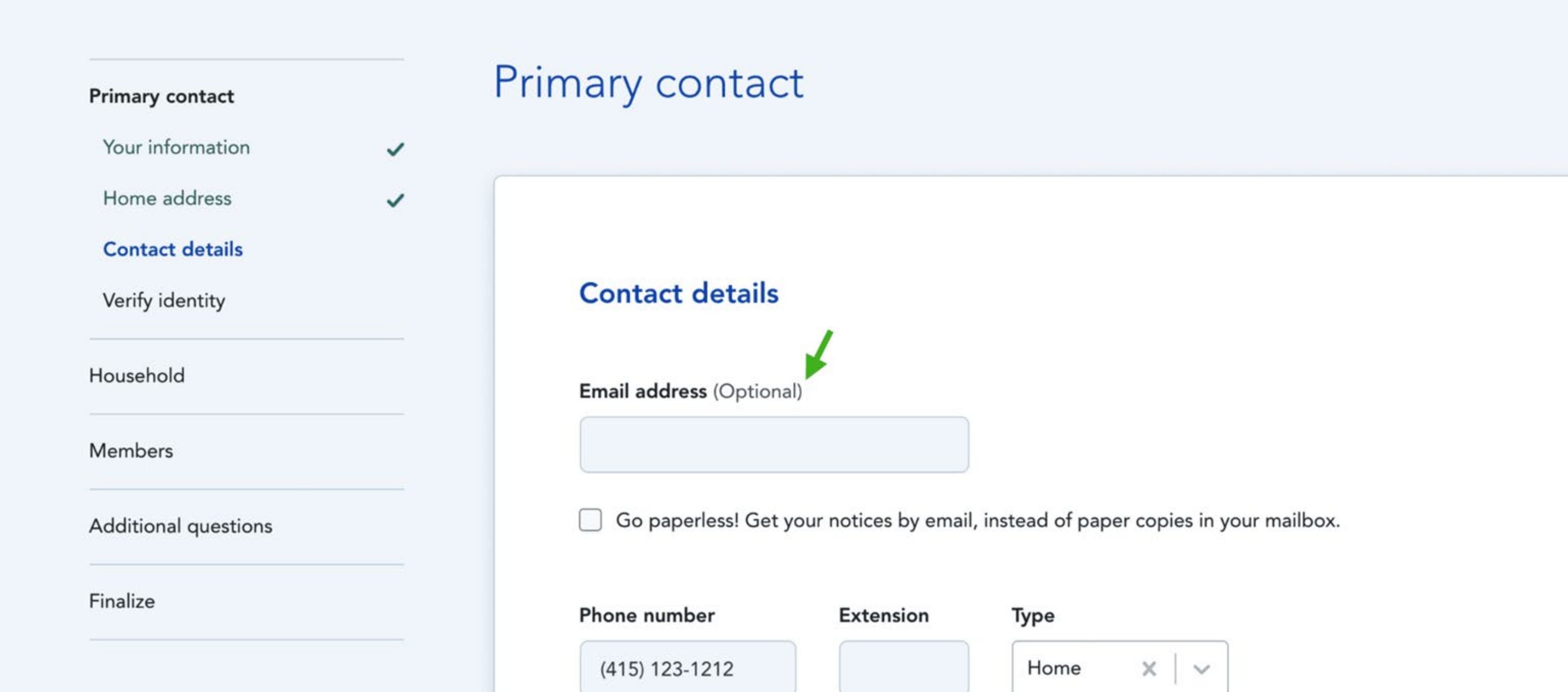


Sort the Client list & Lead list alphabetically



Client email now optional

- Clients will not be able to self-service through HealthSherpa.
- Clients will still receive snail mail from HealthCare.gov



Account management

Best Practices

- Include complete and accurate information on consumer applications
  - Full name (should match documentation - e.g., if their SSN card lists their middle name, include their middle name)
  - SSN
  - Email
  - Race/Ethnicity
- Submit follow-up documents in a timely manner
  - Data Matching Issues (DMIs)
  - SEP Verification Issues (SVIs)
- Encourage customers to make their binder payments
  - $0 Premium plans

Agent Email notifications for follow-up documents

With Follow-up Document Notification Emails, you'll receive an email at 1:00AM EST if there are any follow up document status changes for your clients. The email will include a simple, digestible table like the example below of all the status changes that occurred that day.

Client	Follow-up	Status update	Due date
Jose Gomez	Citizenship	Action needed	02/30/2022
Jane Parker	Immigration status	Processing	03/31/2022
Lindsey Jane	Social security number	Completed	04/30/2022
Lindsey Jane	Non Medicaid / CHIP coverage	Insufficient documentation	03/31/2022
Joe Danielson	Income	Expired	01/01/2022

The table you receive via email is not a running list — it will only include information on client statuses that have changed within the last 24 hours.

Click here to read full details about this new feature

Customer Email notifications for follow-up documents

- New email notification feature ensures that your clients never miss a follow-up document deadline

- Clients who meet this critera will receive an email 15, 5, and 1 days before their follow-up deadline:
  - Their application is active (not cancelled or terminated), and
  - They have 1 or more follow-up documents in either of these 2 statuses:
    - "Action needed" (no document has been uploaded)
    - "Insufficient docs" (the document uploaded was rejected)

Hello [Client name],

This is a reminder that in order to secure your health coverage, you need to submit documents which prove the following items by the deadlines listed below:

- Submit proof of [Follow-up type] for [Client name] by [Deadline]
- Submit proof of [Follow-up type] for [Client name] by [Deadline]
- Submit proof of [Follow-up type] for [Client name] by [Deadline]

Note: If you don't submit these by the deadline, you may lose your subsidy, or lose your health coverage entirely!

Please reach out with these documents right away, or with any questions about which documents qualify, so that we can get this resolved for you before the deadline.

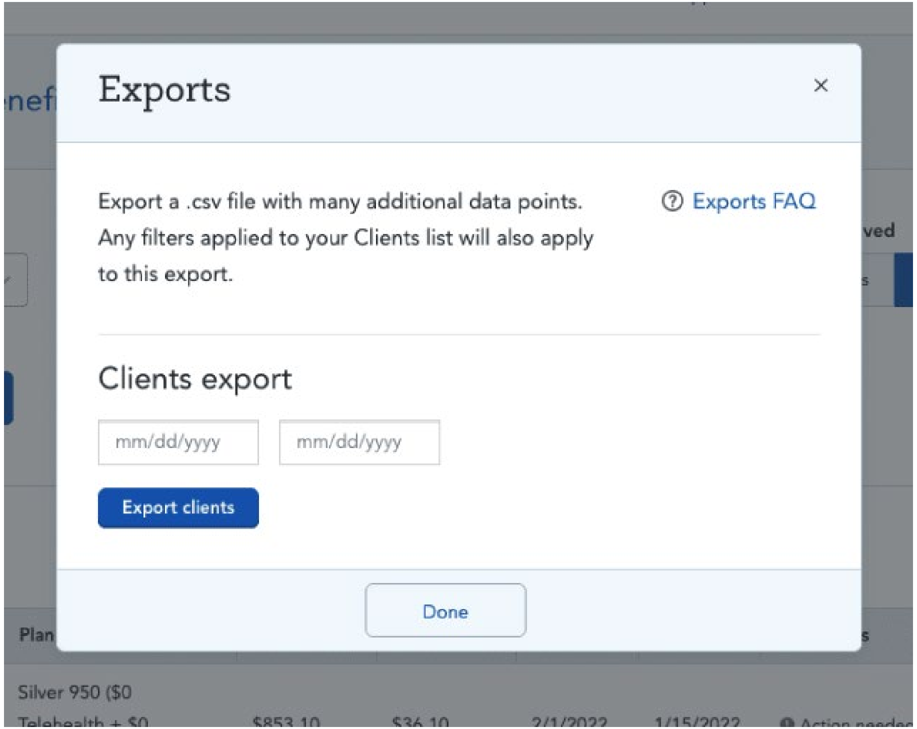
Thank you,

Jose Gomez
Gomez Insurance
(555) 555-5555
jgomez@insurance.com

[Read more about follow-up document reminders for clients here]

Added Client Export Report Flexibility

- When clicking the ‘Export’ button from the Clients or Agency pages, a modal will now appear that lets you choose an export date range. Agencies are also able to include archived clients in the export.
- We made this change so you can get an export for a shorter date range instead of all of your clients every time. This lessens the load on our system, and means faster delivery of the information you need!



[Learn more about Export reports here]

New columns in the export report

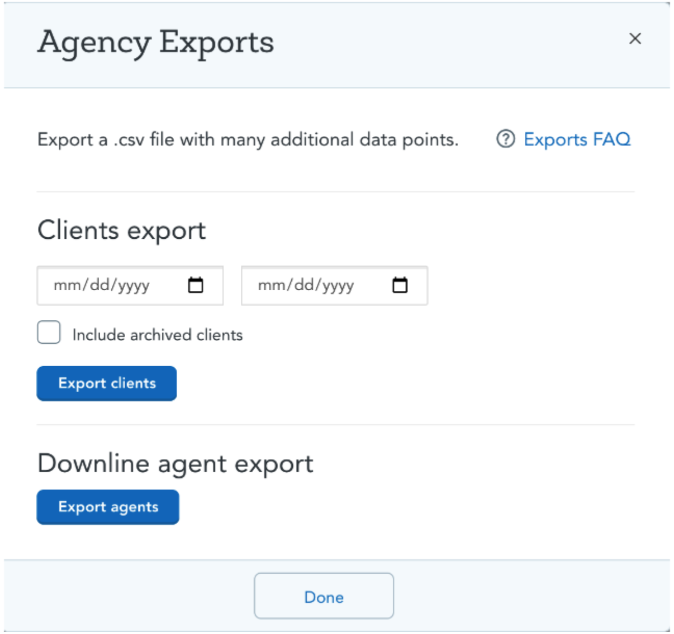
- The export feature allows you to download a CSV of your book of business

- Notable additions this SEP:
  - **EDE sync timestamp (last_ede_sync):** shows the last time this application was synced with the Marketplace and helps you ID where you need to refresh statuses
  - **More details about an application's NPN (npn_reason):** tells you whether you're the AOR, if the NPN is an 'Other Party', or if there is 'No AOR'

Learn more about this feature here.

Agency Roster Exports

Agency Admins can now export information on their downline agents. We added this feature to help Agencies do the following:



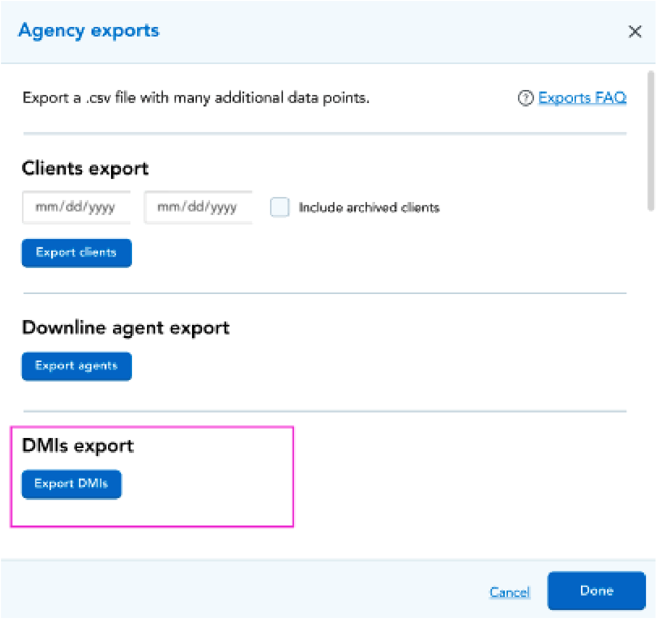
- Email their downline agents who have linked HealthSherpa agent accounts
- Check whether their downline agents' settings are accurate
- Confirm their downline agents have enabled EDE
- Assess enrollment volume at the downline agent-level

To download your Agency Roster export, click the 'Export' button from the Agency tab. A modal similar to the example below will appear, and you will click 'Export agents' to receive a copy of your roster. [Learn more about Export reports here]

Agency DMI exports

We've created an agency admin export called "Agency DMI Report' that includes the following pieces of information:

- Agent Name
- Submission date
- Client FFM app id
- DMI Type
- DMI Status
- DMI Due Date
- URL Link to Client Details page



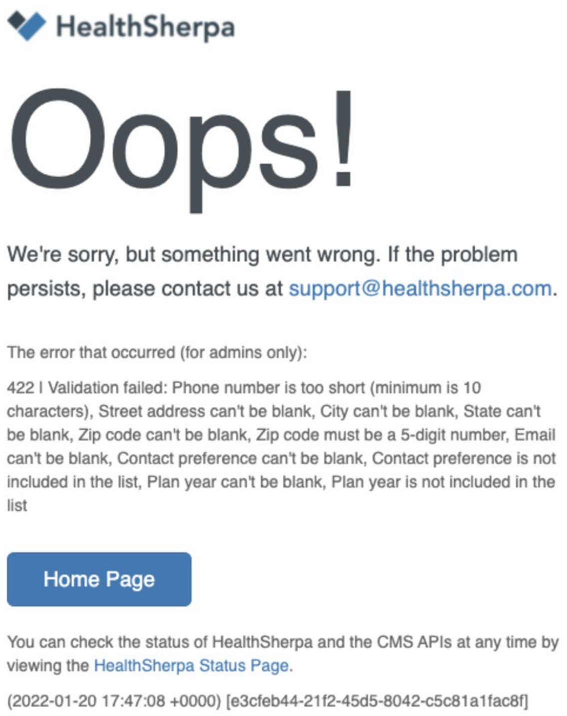
This export will pull DMIs with a due date from the past 2 months to anytime in the future.

The DMI report will be available through your 'export' button, which you will be able to pull anytime and will also be sent out on a weekly basis. If you wish to opt-out of these emails, you can do so by going to your HealthSherpa settings and changing the status.

Technical Changes

Error Message Explanations

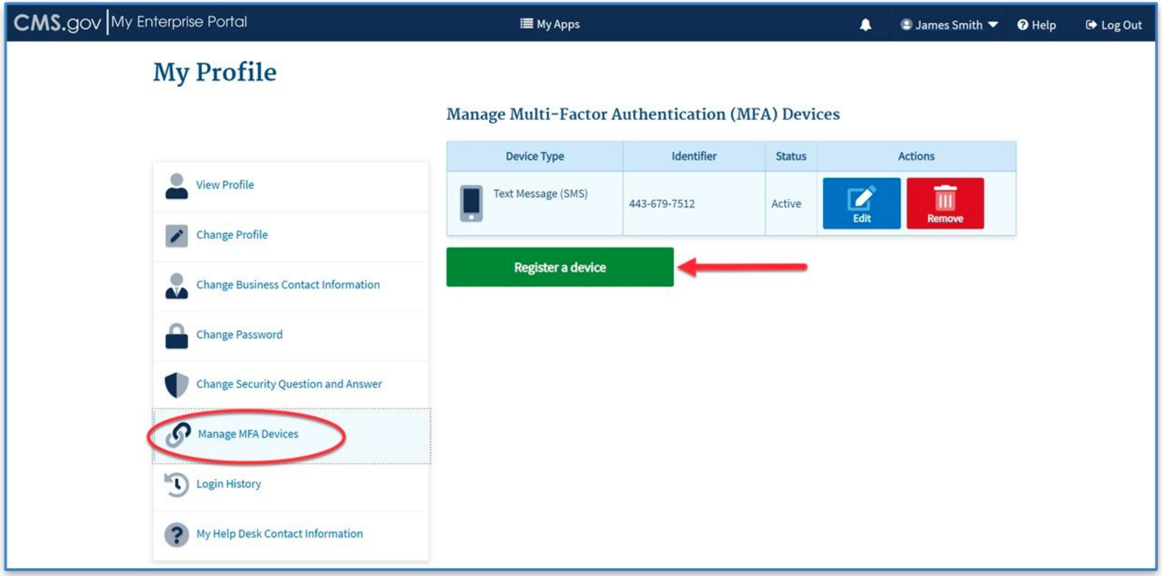
- Error messages now show you a bit more about what went wrong
- Proactively assists you when troubleshooting



New CMS Requirement

Multi-factor Authentication (MFA)
CMS recently announced and went live with MFA.

- Must be setup through CMS portal
- MFA will be required if double redirecting to the MP from HealthSherpa
- MFA required when accessing CMS enterprise portal and Marketplace Learning Management System
  - For more information, visit CMS MFA guide

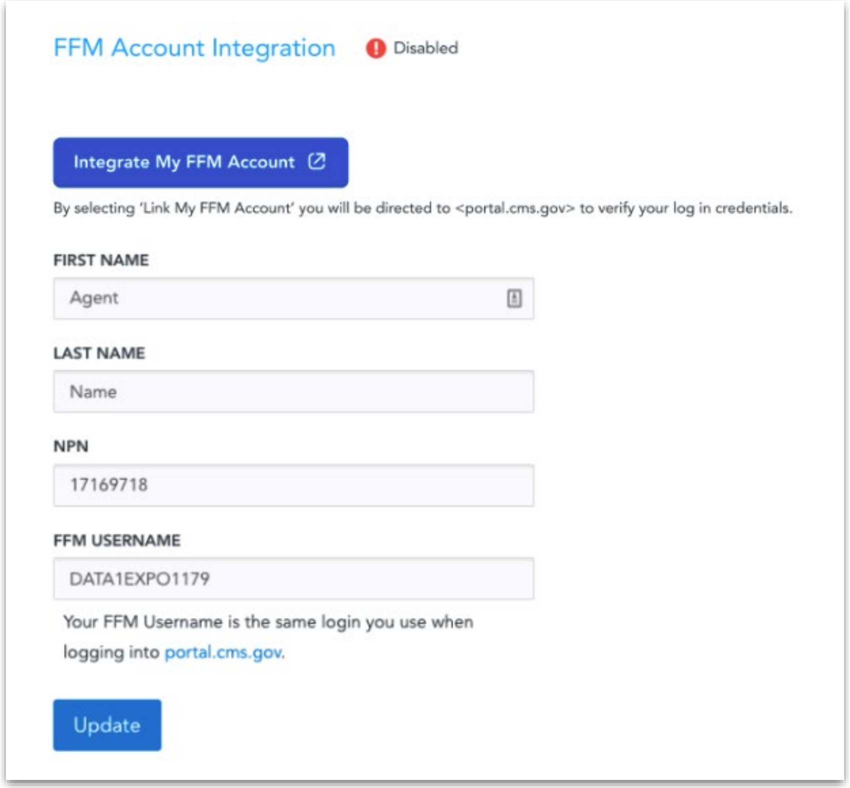


CMS 2 Factor Authentication (Live 9/1)

CMS is requiring EDE partners like HealthSherpa to use additional authentication for all agents and brokers beginning September 1, 2022.

Integrate your HealthSherpa account with your FFM account to make sure you don't lose access to full functionality on HealthSherpa.

[Click here to read about the change and review integration instructions.]



PY23 Renewals

Agent Renewals

Option 1

Agent Renewal Email

From Clients section of the agent's dashboard, agent can send out a renewal email with a link for Renewal.

Best When: Agent wants to invite one or more of their clients to update their information and renew on their own.

Option 2

Search Marketplace

For new and/or existing members, agent can utilize the "Search Marketplace" to retrieve their application and start the renewal process.

Best When: Agent meets a new client and wants to access their existing Marketplace information to assist with update/renewal.

Option 3

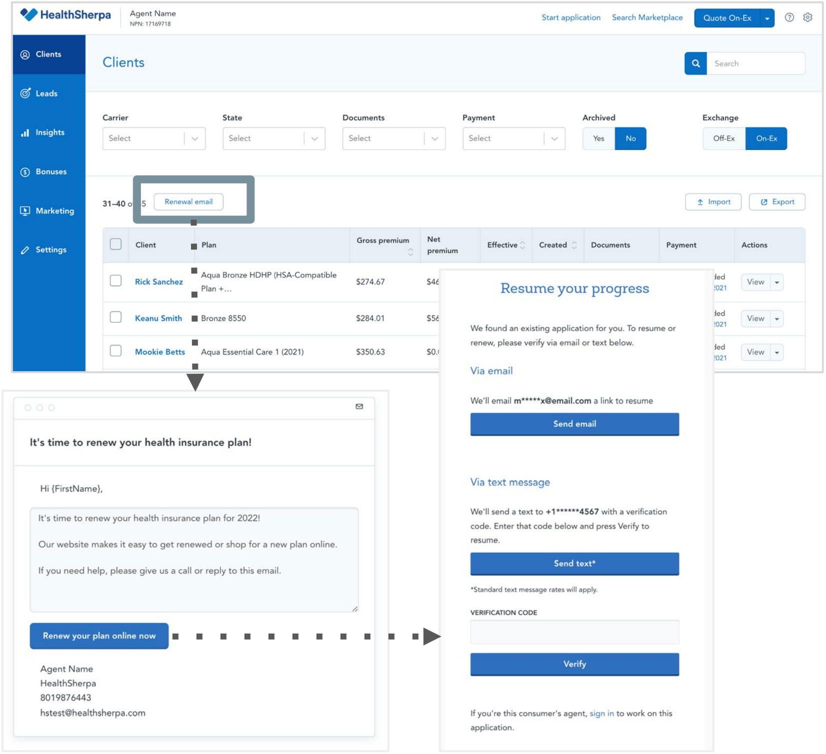
Client Profile

From client's profile, agent can go directly to the renewal process.

Best When: Agent has an existing client and wants to assist with update/renewal.

Option 1

Agent Renewal Email

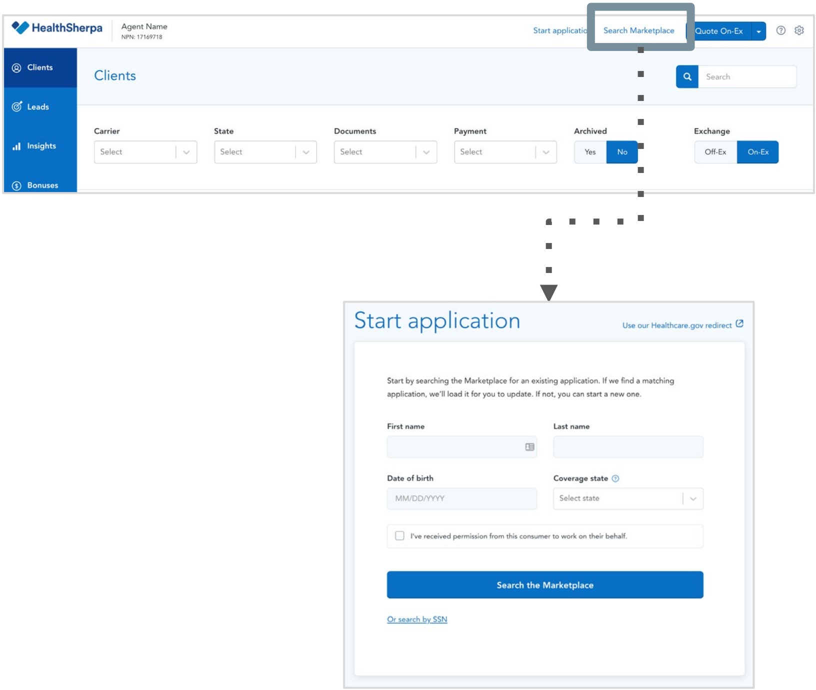


From their Clients dashboard page, the Agent can **trigger a renewal email** to clients (members) that includes a member-specific encoded resume link. The filters can be used to narrow emails and the system will auto-remove any client who has finished renewal. Upon **clicking the link**, the member will be prompted to **verify their identity via email or text** and then view their dashboard.

NOTE: If the agent had started but not finished a renewal application for their client, the member will resume on the last page visited by the agent.

Option 2

Search Marketplace

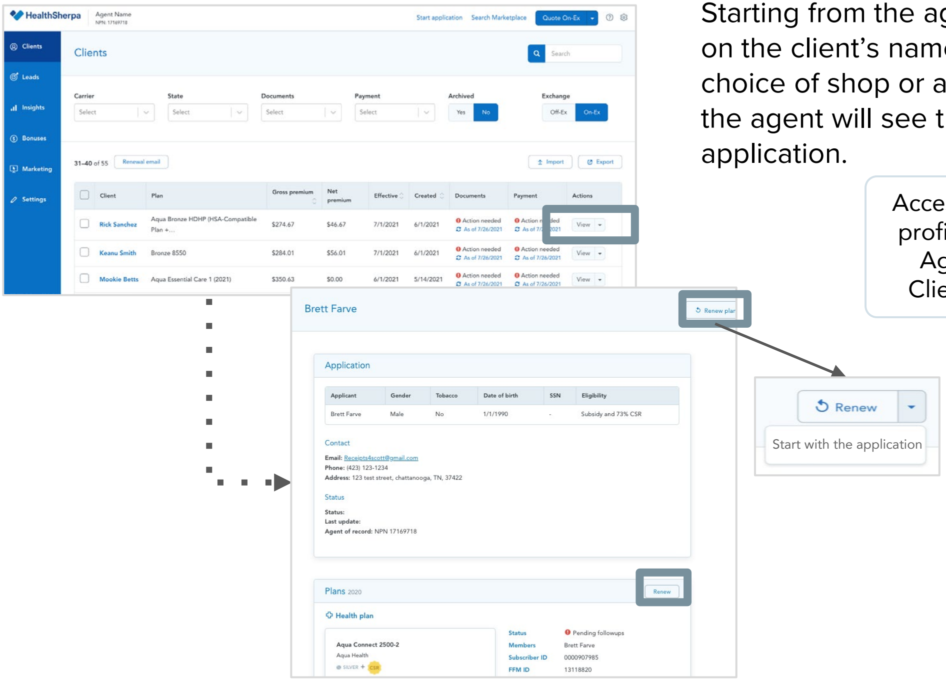


For new and/or existing members, agent can utilize the "**Search Marketplace**" to retrieve the member's application and start the renewal process. Agent will see the crosswalked plan by default but can change plan as appropriate.

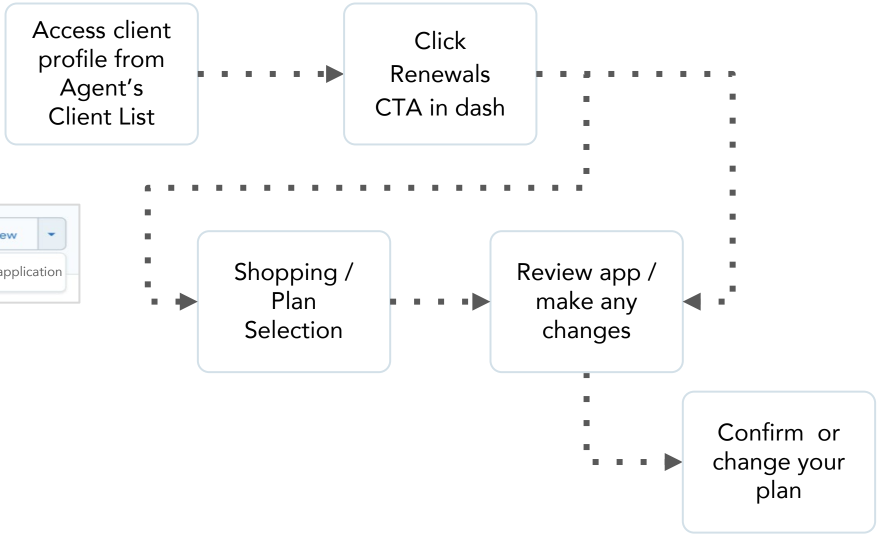
Search for existing apps by Name, DOB, and state → Application is claimed from Hc.gov & prefilled → Start Application (Privacy) → Review app & make any changes → Confirm or change plan

Option 3

Client Profile Renewal

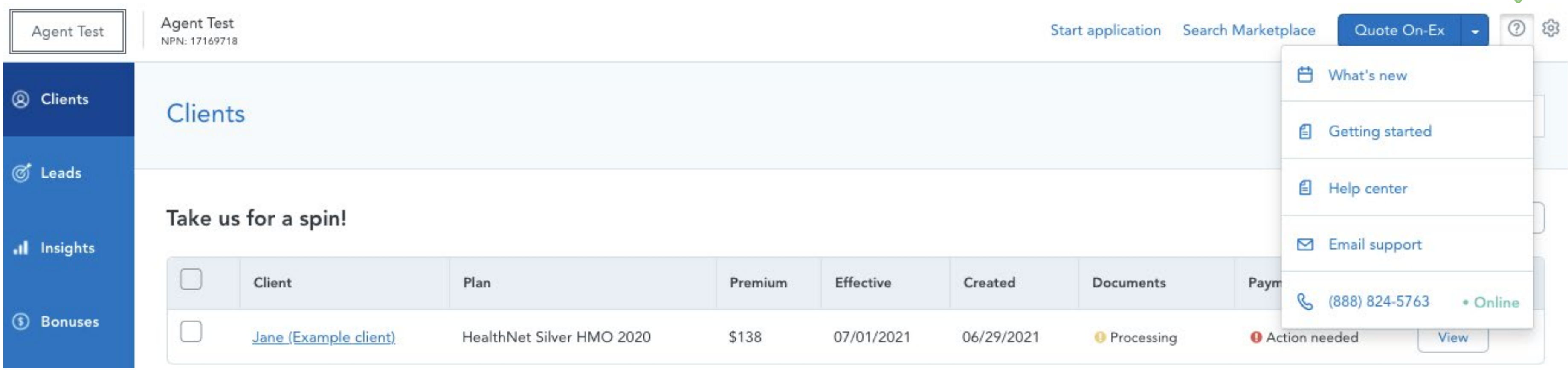


Starting from the agent's client list, the agent accesses their client's profile by clicking on the client's name in the list or the **View** button. The agent can then **renew** with a choice of shop or apply first. When using apply first ("Start with the application" option), the agent will see the crosswalked plan by default after reviewing their client's application.



Resources

Resources



What's new

A running list of product updates and feature releases.

Getting Started

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

Help Center

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

HealthSherpa

HealthSherpa Broker Support

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

Hours of Operation:

January - October (Special Enrollment Period)	Mon - Fri 6AM - 4PM PST
November - December (Open Enrollment Period)	Mon - Fri Extended Hours

PHONE

(888) 684-1373

EMAIL

agent_support@healthsherpa.com

CHAT

Chat from dashboard

Thank you!