

# Get Covered Illinois Broker Webinar

Thursday, June 5, 11:00 a.m. CDT



# Logistics

- **Phone lines are muted upon entry.**
- **To submit comments or questions** or directly chat with other participants, click the icon with three dots at the bottom right of your screen, then select the “Q&A” option.
  - Questions are encouraged!
- We will address questions as they come in, as well as during our formal Q&A session later in today’s webinar.
- The **slides, recording,** and **FAQs** are available on the Get Covered Illinois **website!**
- Please complete the post-webinar survey that will pop up on your screen after exiting the webinar.

# Agenda

## Get Covered Illinois Broker Certification

### Overview of Broker Functionality

- **Broker Portal**

- Managing Book of Business
- View Member Account
- Customer Designations

- **Agency Portal**

- Manage Agency Book of Business
- Accept Customer Designations
- View Member Account
- Transfer Customer within Agency

### Next Steps & Resources

# Steps to Becoming a Get Covered Illinois-Certified Broker

01

Hold a Health  
Line of  
Authority license  
with IDOI

02

(FALL 2025)  
Register and  
claim your  
account with Get  
Covered Illinois

03

(FALL 2025)  
Complete annual  
certification  
training

# Certification

At Get Covered Illinois, we're committed to our partnership with health insurance agents/brokers certified in Illinois. As part of this support, we have created tools and training to support your efforts in our shared mission of enrolling Illinoisians in coverage. The certification program provides the minimum body of knowledge required for Illinois licensed Agents/Brokers to operate on the Get Covered Illinois Marketplace. The online classes are required to be completed annually.

## **Agents/Brokers seeking certification are required to:**

- ✓ Maintain a License with the Illinois Department of Insurance with a health line of authority.
- ✓ Complete online training and the score 80% on the post-training assessment.
- ✓ Sign the Get Covered Illinois User's Agreement.

**2026 Plan Year Certification Deadline: October 17, 2025**

# Broker Data Migration

- As part of migrating customer data from HealthCare.gov to autorenew customers for 2026 Open Enrollment, Get Covered Illinois will be also migrating customers' current broker designations to keep customers connected to their current brokers.
- However, HealthCare.gov does **not** provide Get Covered Illinois with all the broker demographic information necessary for this transition.
- Therefore, Get Covered Illinois is requesting demographic **directly** from brokers as part of this transition. Your timely and accurate provision of this information will ensure that you maintain connection to your current HealthCare.gov-enrolled customers.
- This information will be included in your Get Covered Illinois public broker profile (which you will be able to edit after you first log in to your Get Covered Illinois broker portal).
- Inaccurate information may result in the inability to connect you with your clients for plan year 2026. If Get Covered Illinois cannot verify and match you with your clients, we will not be able to keep you as the broker of record for your current HealthCare.gov enrolled customers and you will have to be redesignated to each of them individually.

# Broker Data Migration

## Get Covered Illinois' Request

- Complete the Broker Transition Information [Form](#).
- **Submit your completed form by Tuesday, 7/15/25.**
- Questions? Contact the Get Covered Illinois Outreach Team ([gci.outreach@illinois.gov](mailto:gci.outreach@illinois.gov))

Data Element	Description
First Name	Provide your full, accurate first name as it would appear on your Illinois Department of Insurance (IDOI) license, in a phone directory or in a Google search.
Last Name	Provide your full, accurate last name as it would appear on your Illinois Department of Insurance license, in a phone directory or in a Google search.
National Producer Number (NPN)	Provide your full, accurate NPN. <b>Do not</b> enter your IDOI License number.
Primary Phone Number	Provide your <b>primary</b> contact phone number in "XXX-XXX-XXXX" format. <b>Do not</b> provide a generic phone number. A cell phone number is preferred.
Email Address	Provide your <b>primary</b> email address in "johndoe@example.com" format. <b>Do not</b> provide a generic email address.
Agency Name	Provide the full, accurate name of your agency. Do not use abbreviations.
Business Address	Provide your agency's street address, suite number (as applicable), city, state, and five-digit ZIP Code.
Federal Employee ID Number	Provide the FEIN of your agency. <b>Do not</b> enter a Social Security Number.
Agency Role	Specify your role in your agency (i.e., Agency Manager or Broker).

# Agenda

## ✓ Get Covered Illinois Broker Certification

### Overview of Broker Functionality

- **Broker Portal**

- Managing Book of Business
- View Member Account
- Customer Designations

- **Agency Portal**

- Manage Agency Book of Business
- Accept Customer Designations
- View Member Account
- Transfer Customer within Agency

### Next Steps & Resources

# Overview of Get Covered Illinois Broker Portal

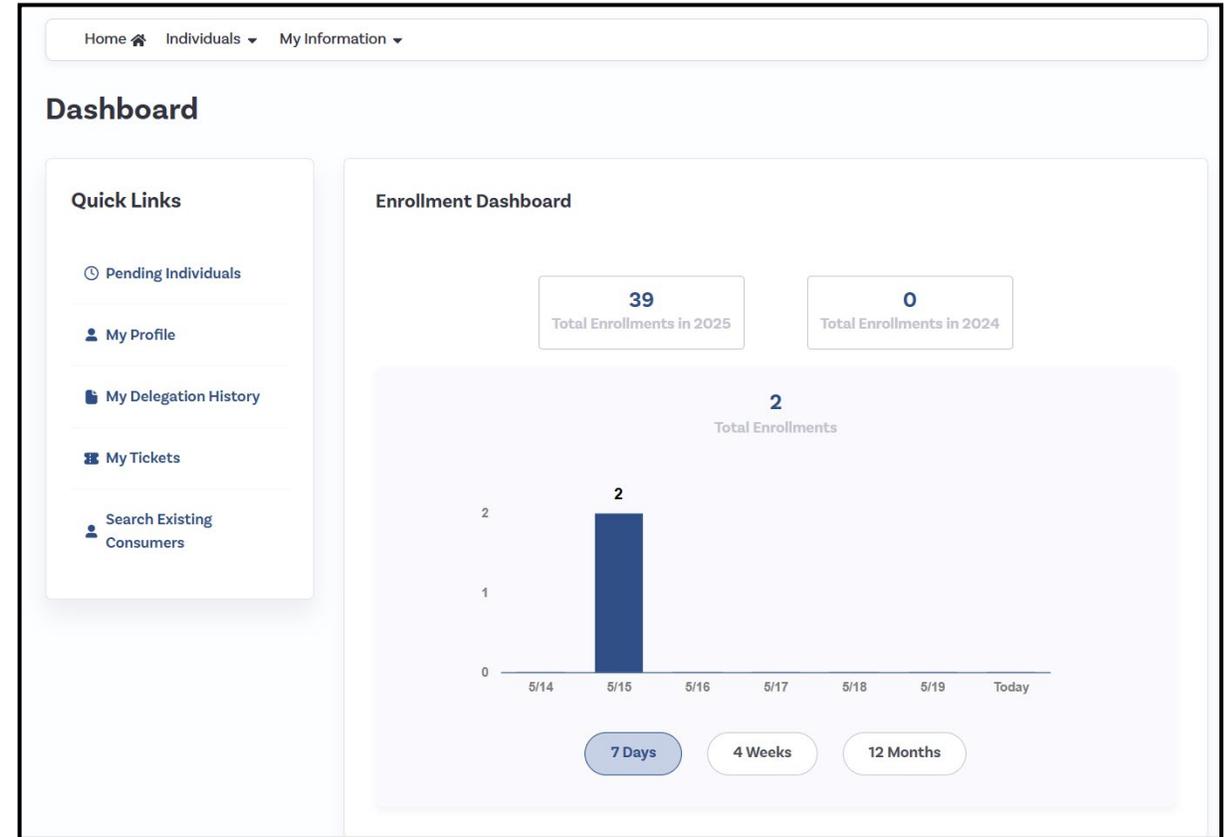
The Get Covered Illinois Broker Portal is a dedicated module optimized for Get Covered Illinois-certified brokers to provide support to their customers.

The portal allows agents to manage their Book of Business, process delegation requests, assist consumers with application and plan selection, and set up Broker Connect.

The portal is designed to support both a single broker with a few consumers as well as a single agency with multiple brokers and thousands of consumers.

## Key Capabilities

- Manage Book of Business
- Assist customer with their application and enrollment
- Upload documents to address DMIs
- Review customer notices
- Manage Customer Delegations



# Broker Portal Basics: Managing Book of Business

Brokers will have access to all clients in their Book of Business.

Brokers can filter their Book of Business by the Following fields:

- First/Last Name
- Application Year
- Application Status
- Applicant Verifications
- QLE Verifications
- Approaching Medicare Age
- Binder Payment
- Enrollment Deadline
- Issuer

The screenshot shows a 'Clients' filter interface. At the top left, it says 'Search all clients'. Below this are several filter fields arranged in a grid:

- First Name**: A text input field.
- Last Name**: A text input field.
- Application Year**: A dropdown menu with 'Select One' and a downward arrow.
- Application Status**: A dropdown menu with 'Select One' and a downward arrow.
- Applicant Verifications**: A dropdown menu with 'Select One' and a downward arrow.
- Qualifying Life Event Verifications**: A dropdown menu with 'Select One' and a downward arrow.
- Approaching Medicare Age**: A dropdown menu with 'Select One' and a downward arrow.
- Binder Payment**: A dropdown menu with 'Select One' and a downward arrow.
- Enrollment Deadline**: A dropdown menu with 'Select One' and a downward arrow.
- Issuer**: A dropdown menu with 'Select One' and a downward arrow.

At the bottom right of the filter area, there are two buttons: 'Clear all' and 'Search'. Below the buttons is a link that says 'See less ^'.

# Broker Portal Basics: Managing Book of Business

Brokers can access their consumer information in two ways:

- (1) View Summary of Consumer Details on the broker's Active Individuals tab
- (2) View Member's account directly and act on behalf of customer

The screenshot displays the 'Clients' section of a broker portal. At the top, there is a navigation bar with 'Home', 'Individuals', and 'My Information'. Below this is a search bar for clients with fields for 'First Name', 'Last Name', and 'Application Year' (a dropdown menu). There are 'Clear all' and 'Search' buttons. A 'See all' link is also present. Below the search bar, it indicates 'Showing 1-7 of 7 items'. There are navigation buttons for 'Previous', '1', and 'Next'. On the right, there are buttons for 'Select all on this page' and 'Export Book Of Business'. The main content area shows a client summary for 'Miles Rigal' with a household case ID of 'IL100004256'. The summary includes 'Application Year: 2025 ( 2 members )', 'Application Status: Report a Change', and 'Eligibility Status: Conditional'. There is a 'Binder Payment Due' notification. To the right, there are sections for 'HEALTH PLAN' (Molina) and 'DENTAL PLAN' (Dominion). At the bottom, there is a 'Select' checkbox and a row of action links: 'Household Composition & Eligibility', 'Applicant Verifications', and 'More Actions'.

# Customer Designations

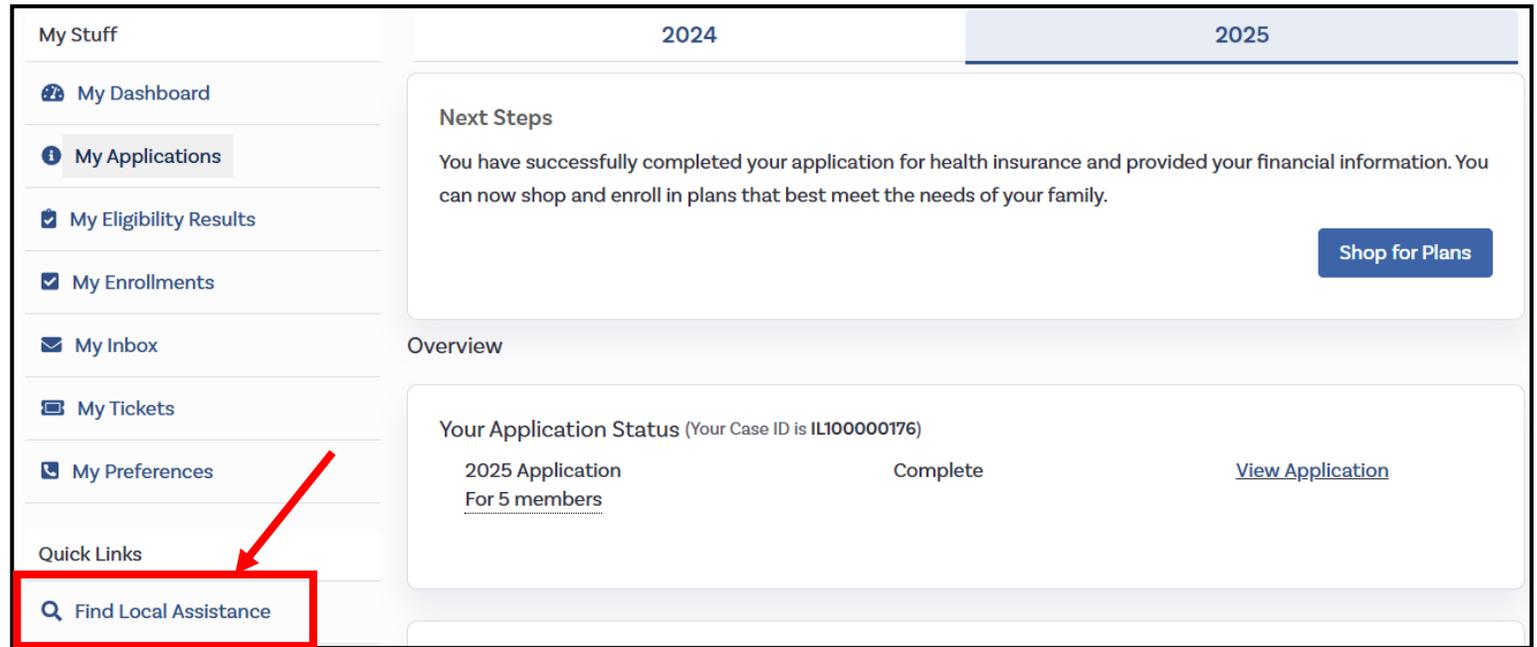
## (1) Find Local Assistance in **Customer Account**

Brokers can designate consumers in two ways:

(1) Consumers can select the broker from their account using the “Find Local Help” search tool.

(2) Brokers can use the “Search for Existing Customer” tool to designate themselves to an existing customer or create a new account if the customer does not have one.

Brokers can designate customers at any time of the year and at any point in the customer’s application or enrollment process.



## (2) Search Existing Consumers in **Broker Account**



# Detailed Walkthrough: Find Local Assistance Tool

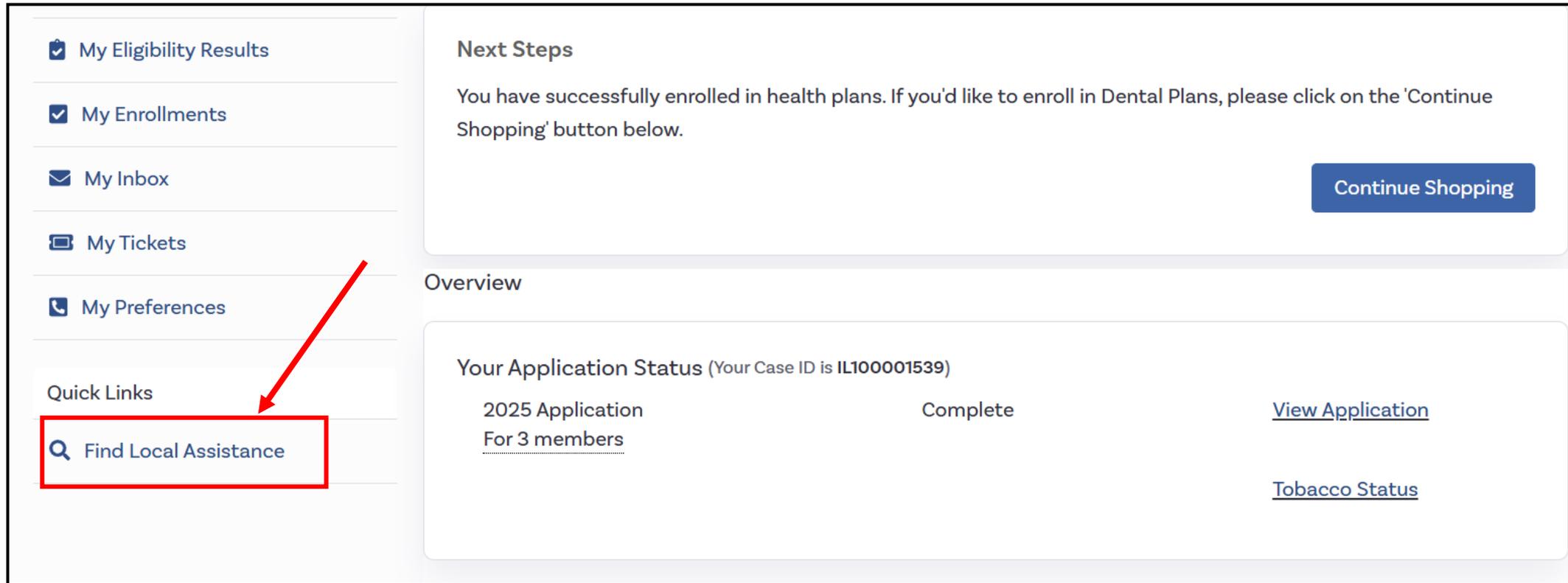
The following slides show the process that consumers can use to request a broker designation directly from their account. The high-level process is below:

1. Consumer selects “Find Local Assistance” within their account.
2. Consumer selects the broker that they want to work with and submits this request.
3. The broker receives this request on the “Pending Individuals” tab of their Broker Portal.
4. The broker accepts this request to become designated to the consumer.

***NOTE: The slides are from a test environment and do not reflect Get Covered Illinois' finalized language/content that will be displayed in the portal. All information shown is mock data (no real PII).***

# Detailed Walkthrough: Find Local Assistance Tool

**Step 1:** Consumers select “Find Local Assistance” from their dashboard:



The screenshot shows a user dashboard with a left-hand navigation menu and a main content area. The navigation menu includes: My Eligibility Results, My Enrollments, My Inbox, My Tickets, My Preferences, and a Quick Links section. The 'Find Local Assistance' link in the Quick Links section is highlighted with a red box, and a red arrow points to it from the right. The main content area has a 'Next Steps' section with a 'Continue Shopping' button, an 'Overview' section, and a 'Your Application Status' section. The application status section shows '2025 Application For 3 members' as 'Complete' with links for 'View Application' and 'Tobacco Status'.

Your Application Status (Your Case ID is IL100001539)		
2025 Application For 3 members	Complete	<a href="#">View Application</a>
		<a href="#">Tobacco Status</a>

# Detailed Walkthrough: Find Local Assistance Tool

**Step 2:** Consumers select “Find an Illinois Certified Agent or Broker Near You”\*

### Find Local Assistance at No Cost to You



Agents and brokers are licensed by Illinois's Department of Insurance and have completed additional training to become certified with Getcovered Illinois. Only an agent or broker can make specific recommendations about which plan you should buy. Note that some agents and brokers may only be able to sell plans from specific health insurance companies.

**FIND A ILLINOIS CERTIFIED AGENT OR BROKER NEAR YOU**



Getcovered Illinois Assisters belong to Enrollment Entities, which include hospitals and not-for-profit organizations from around the state that have been trained by Getcovered Illinois to help you understand what options are available to you and your family. They cannot make specific recommendations about which plan you should buy.

**FIND A ILLINOIS ASSISTER NEAR YOU**

**Step 3:** Consumers can input a Zip Code range, or the broker's name if they know who they want to work with already.

### Search for a Certified Agent or Broker

OR

#### Search by location

Zip code \*

Distance

5

miles

Languages

Select an Option

**Search**

#### Search by Name

First Name

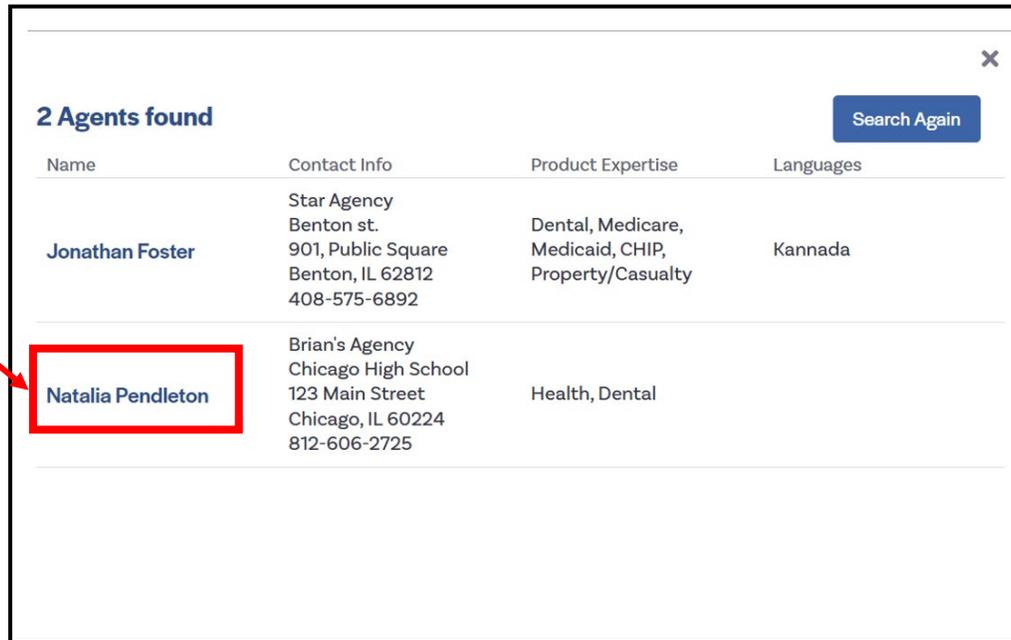
Last Name

Agency Name

**Search**

# Detailed Walkthrough: Find Local Assistance Tool

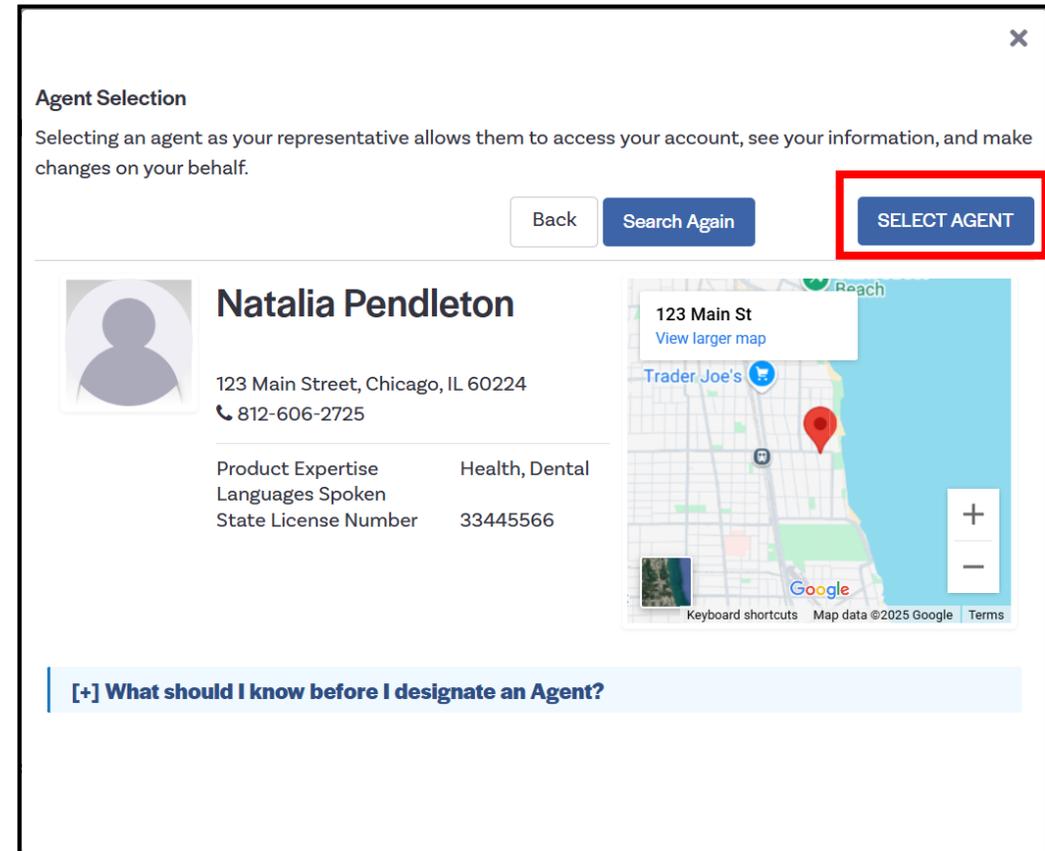
**Step 4:** Consumers select the name of the broker that they would like to work with.



2 Agents found Search Again

Name	Contact Info	Product Expertise	Languages
Jonathan Foster	Star Agency Benton st. 901, Public Square Benton, IL 62812 408-575-6892	Dental, Medicare, Medicaid, CHIP, Property/Casualty	Kannada
Natalia Pendleton	Brian's Agency Chicago High School 123 Main Street Chicago, IL 60224 812-606-2725	Health, Dental	

**Step 5:** Consumers click “Select Agent” if they would like to proceed with this broker:



Agent Selection

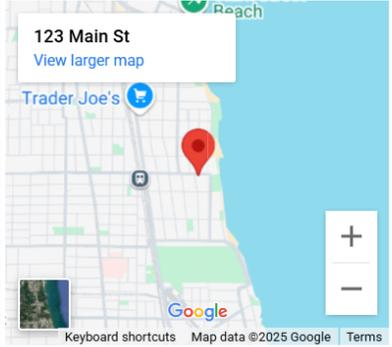
Selecting an agent as your representative allows them to access your account, see your information, and make changes on your behalf.

Back Search Again **SELECT AGENT**

 **Natalia Pendleton**

123 Main Street, Chicago, IL 60224  
812-606-2725

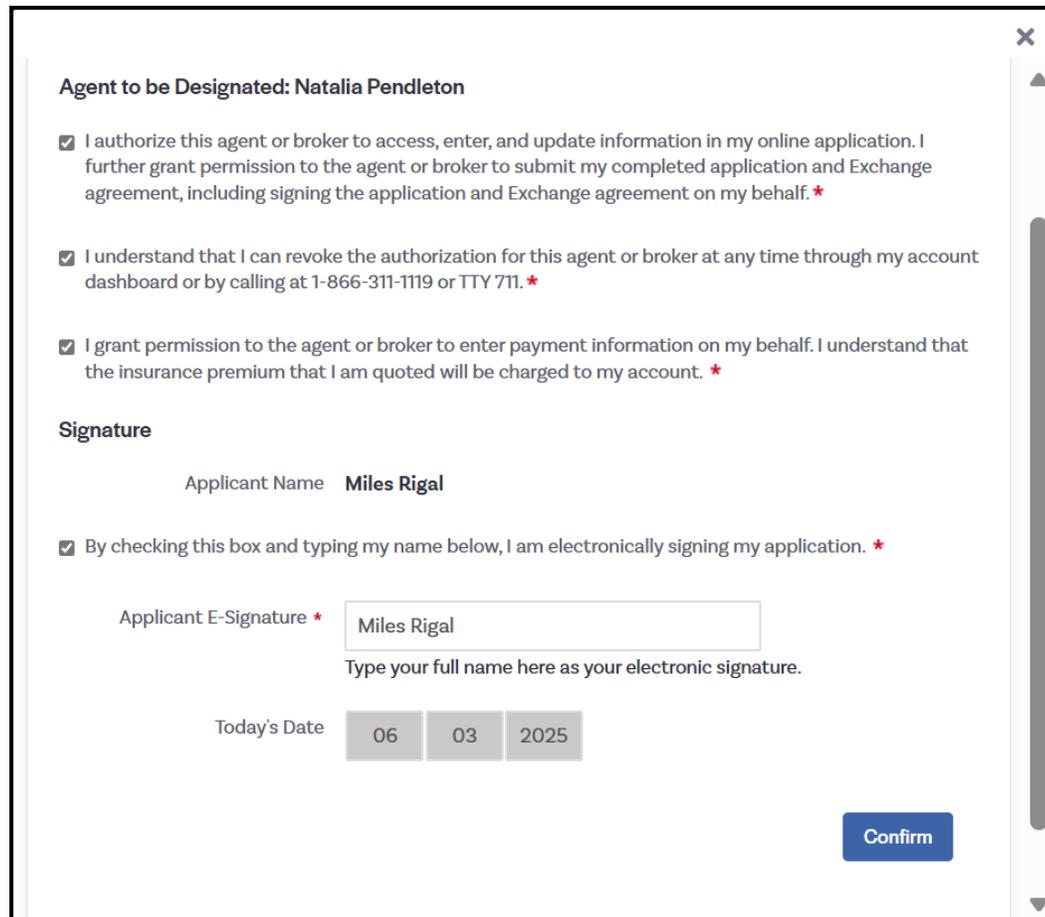
Product Expertise: Health, Dental  
Languages Spoken: [unspecified]  
State License Number: 33445566



[+] What should I know before I designate an Agent?

# Detailed Walkthrough: Find Local Assistance Tool

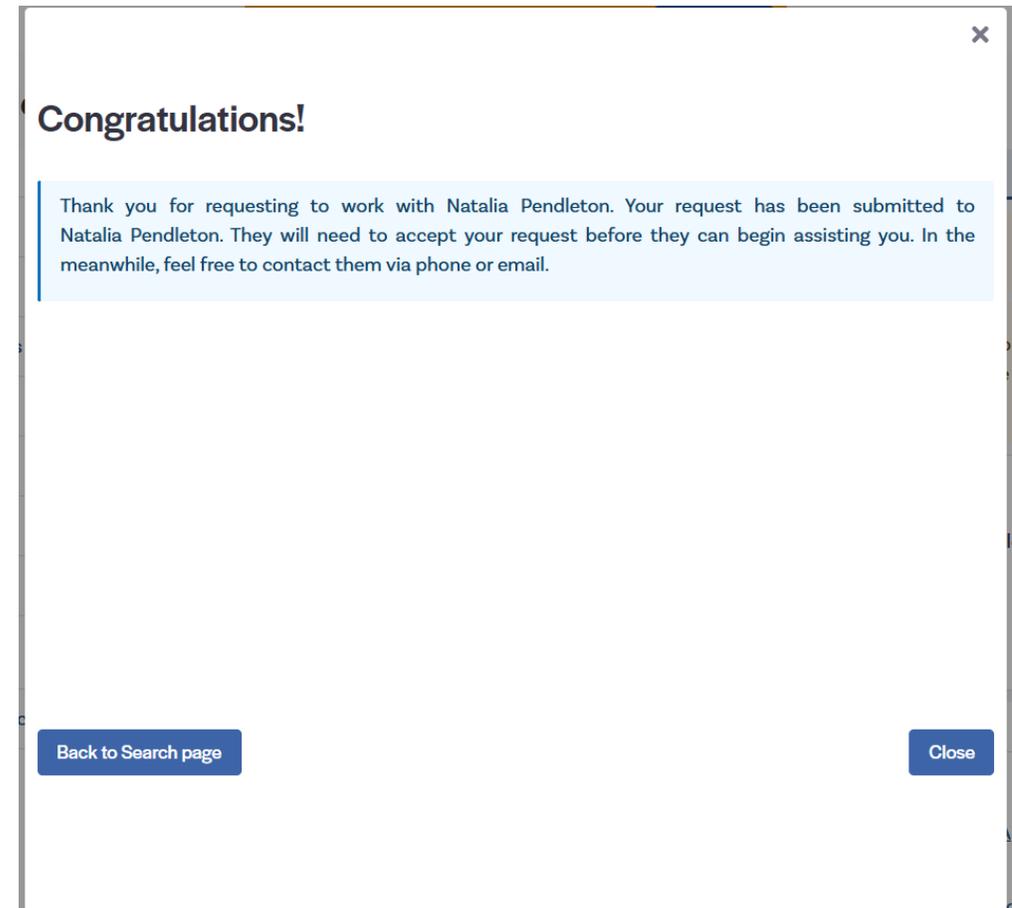
**Step 6:** Consumers review the agreement and select “Confirm”.



The screenshot shows a confirmation window with the following content:

- Agent to be Designated: Natalia Pendleton**
- Three checked checkboxes with associated text:
  - I authorize this agent or broker to access, enter, and update information in my online application. I further grant permission to the agent or broker to submit my completed application and Exchange agreement, including signing the application and Exchange agreement on my behalf. \*
  - I understand that I can revoke the authorization for this agent or broker at any time through my account dashboard or by calling at 1-866-311-1119 or TTY 711. \*
  - I grant permission to the agent or broker to enter payment information on my behalf. I understand that the insurance premium that I am quoted will be charged to my account. \*
- Signature**
- Applicant Name: **Miles Rigal**
- Checked checkbox: By checking this box and typing my name below, I am electronically signing my application. \*
- Applicant E-Signature \*:   
Type your full name here as your electronic signature.
- Today's Date:
- Confirm** button

**Step 7:** Consumers receive success screen informing them that their request was sent to the broker.

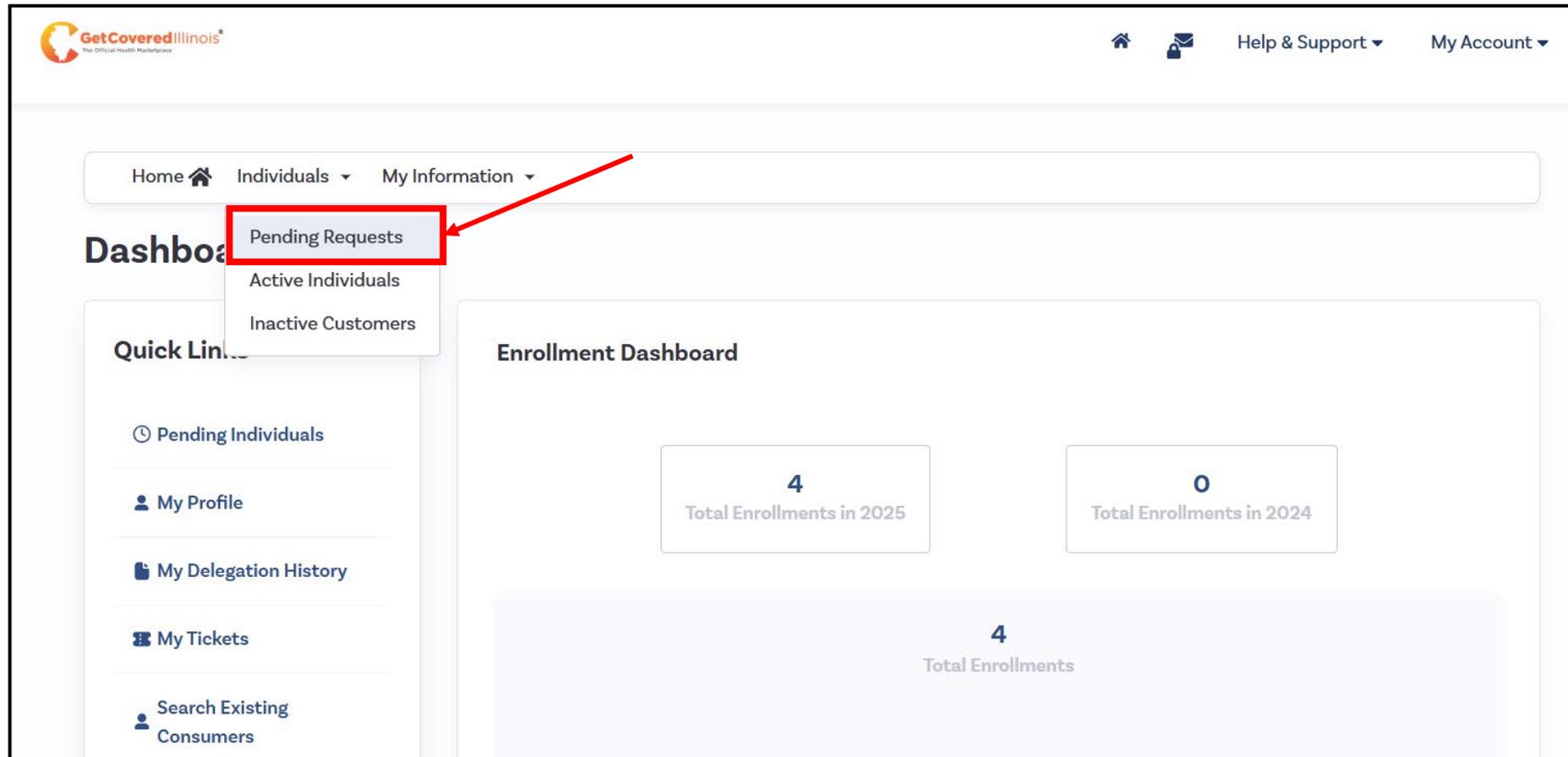


The screenshot shows a success message window with the following content:

- Congratulations!**
- Message box: Thank you for requesting to work with Natalia Pendleton. Your request has been submitted to Natalia Pendleton. They will need to accept your request before they can begin assisting you. In the meanwhile, feel free to contact them via phone or email.
- Back to Search page** button
- Close** button

# Detailed Walkthrough: Find Local Assistance Tool

**Step 8:** Broker navigates to “Pending” Individuals tab to view request.



# Detailed Walkthrough: Find Local Assistance Tool

**Step 9:** Broker selects “Accept” to designate the customer to their account.

The screenshot shows a web interface for managing individuals. At the top, there are navigation links: Home, Individuals, and My Information. Below this is a section titled 'Pending Individuals' with a sub-header '1 Pending Individual'. On the left, there is a 'Refine Results By' section with a '(Reset all)' link. It contains two text input fields for 'First Name' and 'Last Name', and a 'Request Sent' section with two date pickers labeled 'From:' and 'To:'. A 'Go' button is located below the date pickers. The main area on the right contains a table with the following data:

Name	Family Size	Request Sent	
Miles Rigal	2	06/03/2025	<div style="border: 1px solid red; padding: 2px;">Accept</div> <div>Decline</div>

A red arrow points to the 'Accept' button in the table row.

# Detailed Walkthrough: Find Local Assistance Tool

**Step 10:** The customer is now in the broker's Book of Business:

Home [Individuals](#) [My Information](#)

## Clients

Search all clients

First Name  Last Name  Application Year

[See all](#)

Showing 1-6 of 6 items

**Miles Rigal**

Household Case ID **IL100004256**

Application Year **2025 (2 members)**

Application Status **Report a Change**

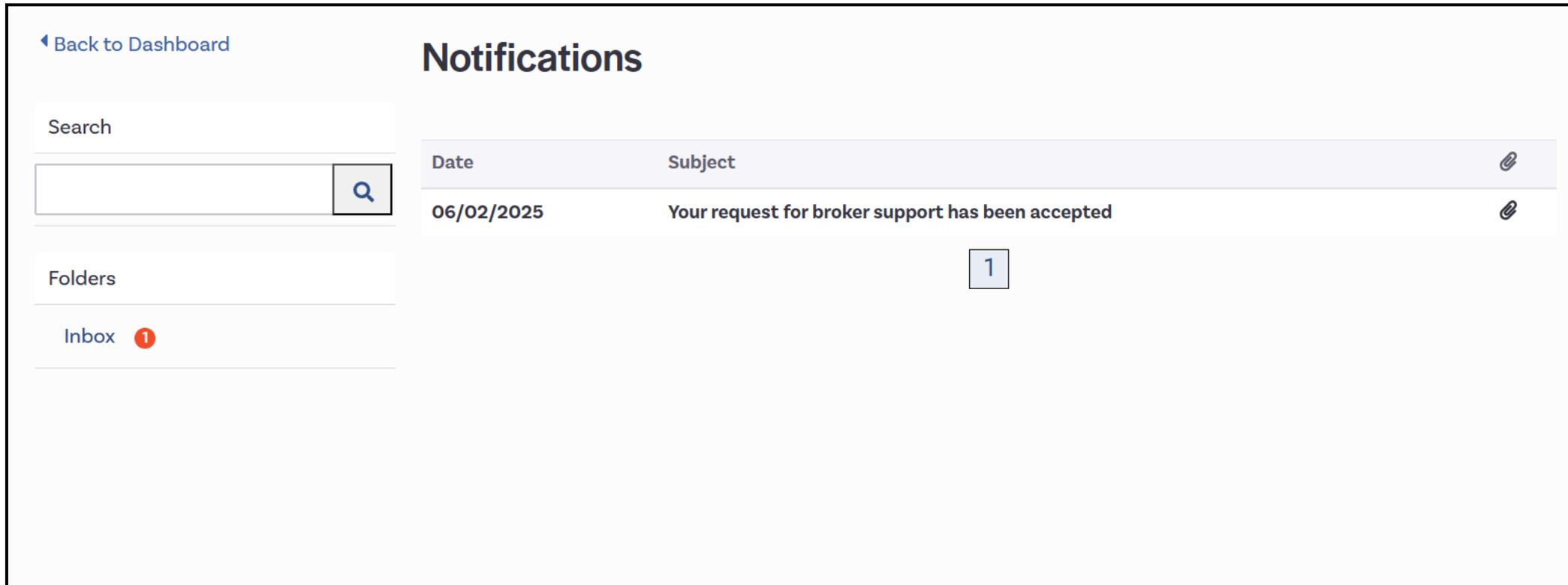
Eligibility Status **Conditional**

HEALTH PLAN  DENTAL PLAN

Select [Household Composition & Eligibility](#) [Applicant Verifications](#) [More Actions](#)

# Detailed Walkthrough: Find Local Assistance Tool

**Step 11:** Consumer receives a notice that their broker designation was accepted.



The screenshot shows a user dashboard with a 'Notifications' section. On the left, there is a 'Back to Dashboard' link, a search bar, and a 'Folders' section with an 'Inbox' folder containing 1 notification. The main 'Notifications' area displays a table with one notification: '06/02/2025' with the subject 'Your request for broker support has been accepted'. A blue box with the number '1' is overlaid on the notification table. The notification also includes a link icon.

Date	Subject	
06/02/2025	Your request for broker support has been accepted	

# Detailed Walkthrough: View Member Account

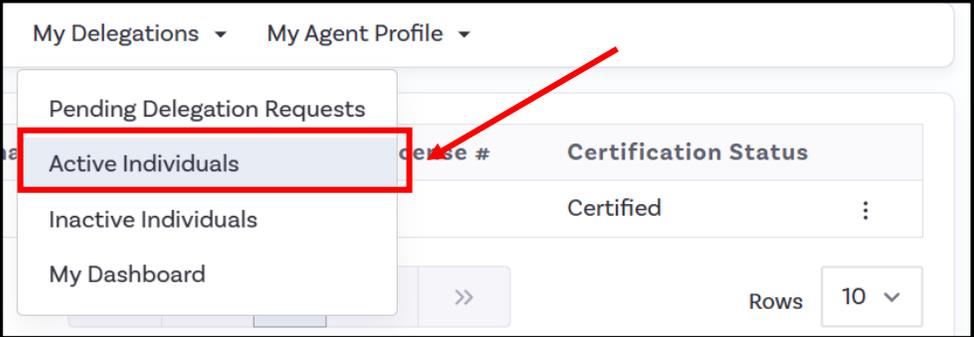
After a consumer is affiliated with a broker, the broker can view their account and act on behalf of them. The following slides show how brokers can access their account. The high-level process is below:

1. Broker navigates to “Active Individuals” tab.
2. Broker selects “More Actions” then “View Household Details” on the specific consumer.
3. Broker selects proceed to “Individual View.”
4. The broker is now in the consumer’s account and can take action on behalf of them.

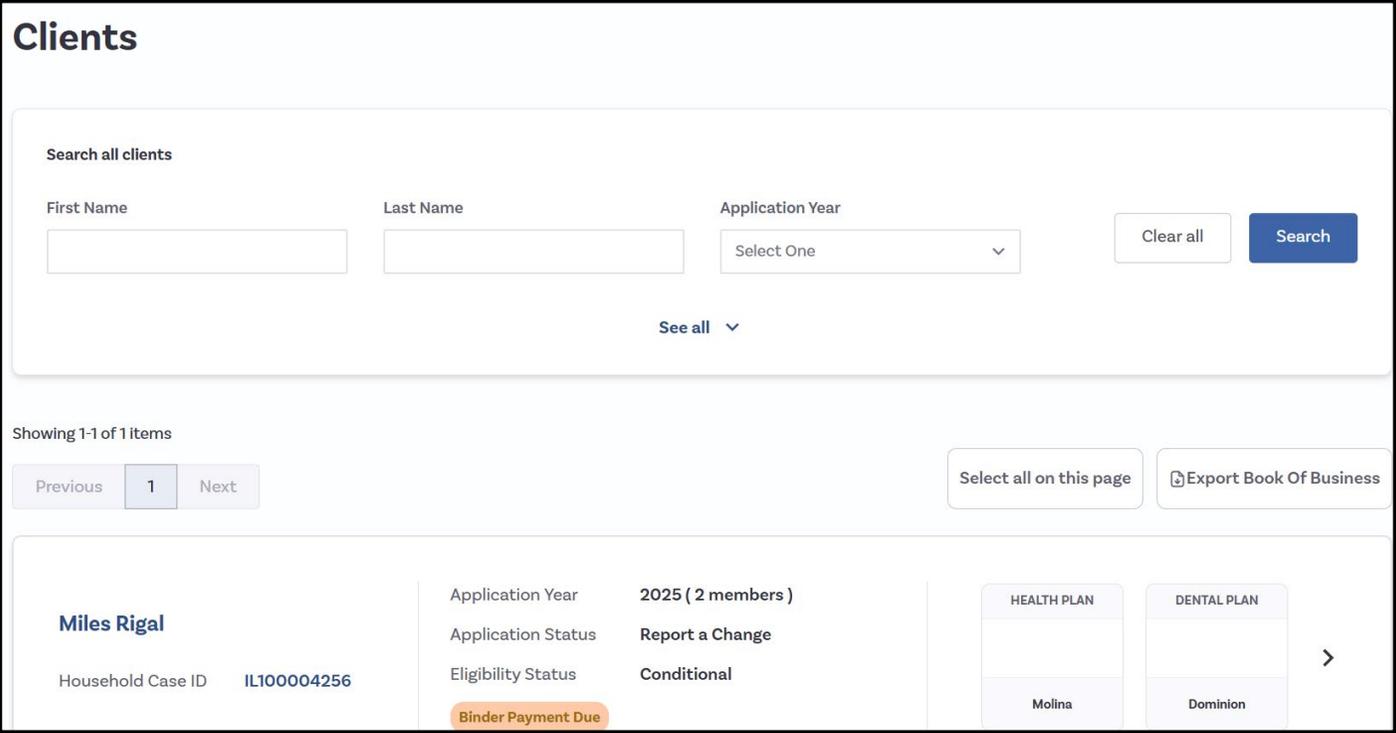
***NOTE: The slides are from a test environment and do not reflect Get Covered Illinois’ finalized language/content that will be displayed in the portal. All information shown is mock data (no real PII).***

# Detailed Walkthrough: View Member Account

**Step 1:** Broker navigates to the “Active Individuals” tab of their portal:



**Step 2:** Broker can view, search, and filter by active clients in their book of business:



# Detailed Walkthrough: View Member Account

**Step 3:** Broker identifies consumer and selects “View Household Details.”

Showing 1-1 of 1 items

Previous 1 Next

Select all on this page Export Book Of Business

**Miles Rigal**

Household Case ID **IL100004256**

Application Year **2025 ( 2 members )**

Application Status **Report a Change**

Eligibility Status **Conditional**

**Binder Payment Due**

HEALTH PLAN DENTAL PLAN

Molina Dominion

Select Household Composition & Eligibility Applicant Verifications More Actions

View Details

**View Household Details**

Resend Activation Email

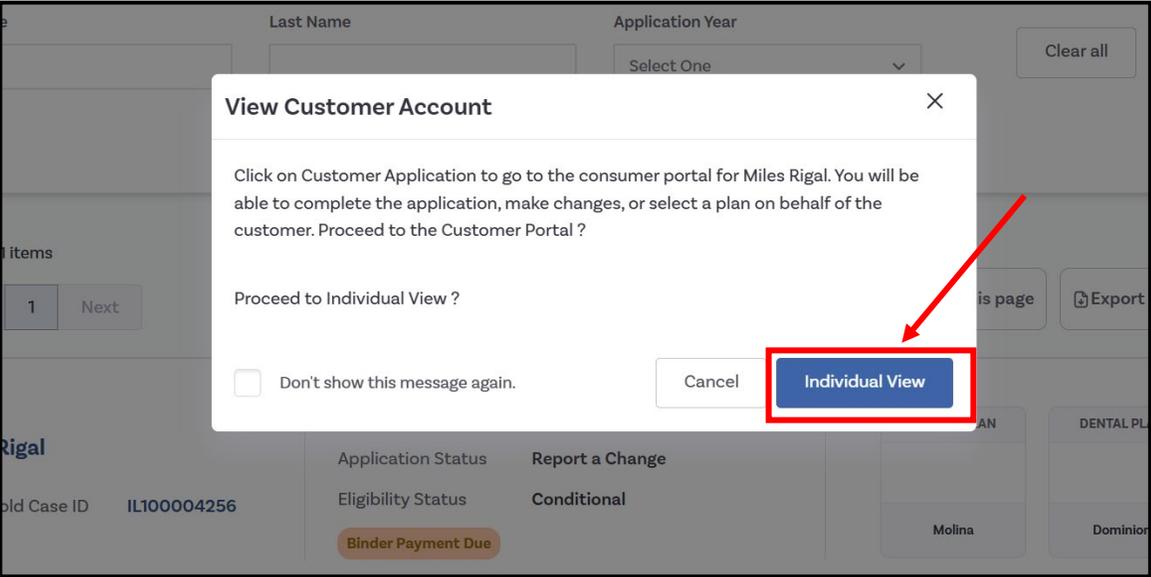
Mark As Inactive

View Enrollment Details

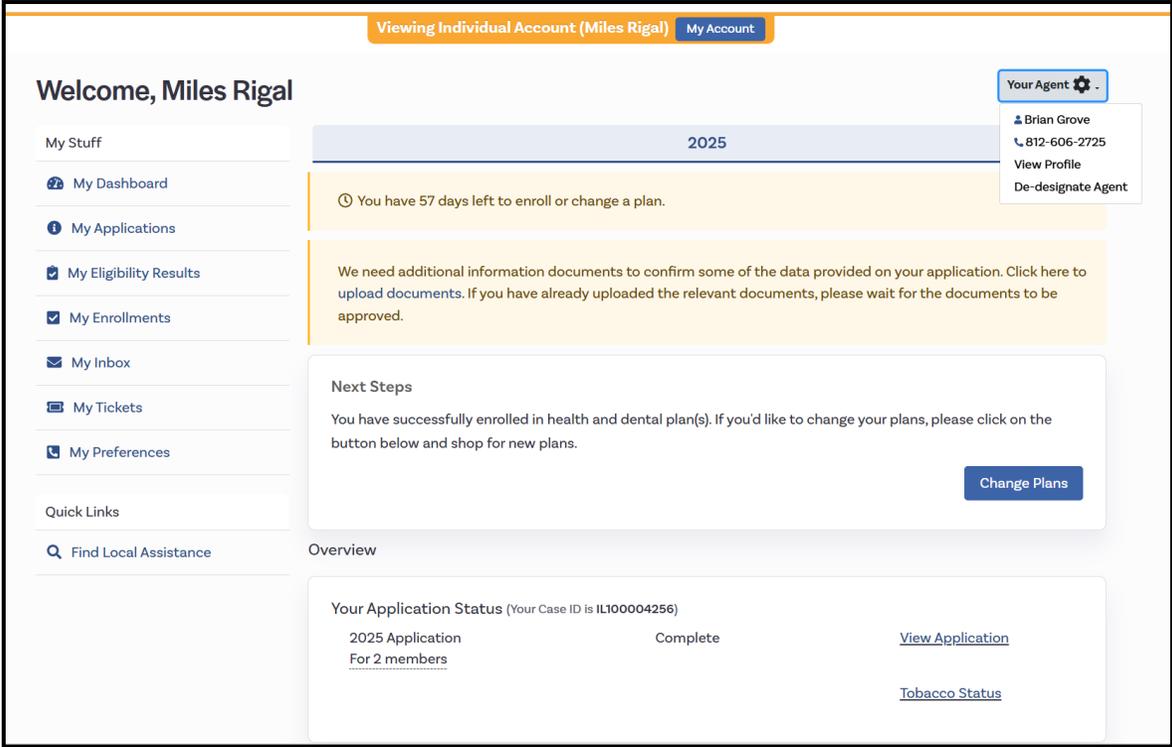
Submit New Ticket

# Detailed Walkthrough: View Member Account

**Step 4:** Broker confirms that they would like to Proceed to the Individual View:



**Step 5:** Broker is now in the consumer's account and can take action on behalf of the consumer:



# Detailed Walkthrough: Search for Existing Customer

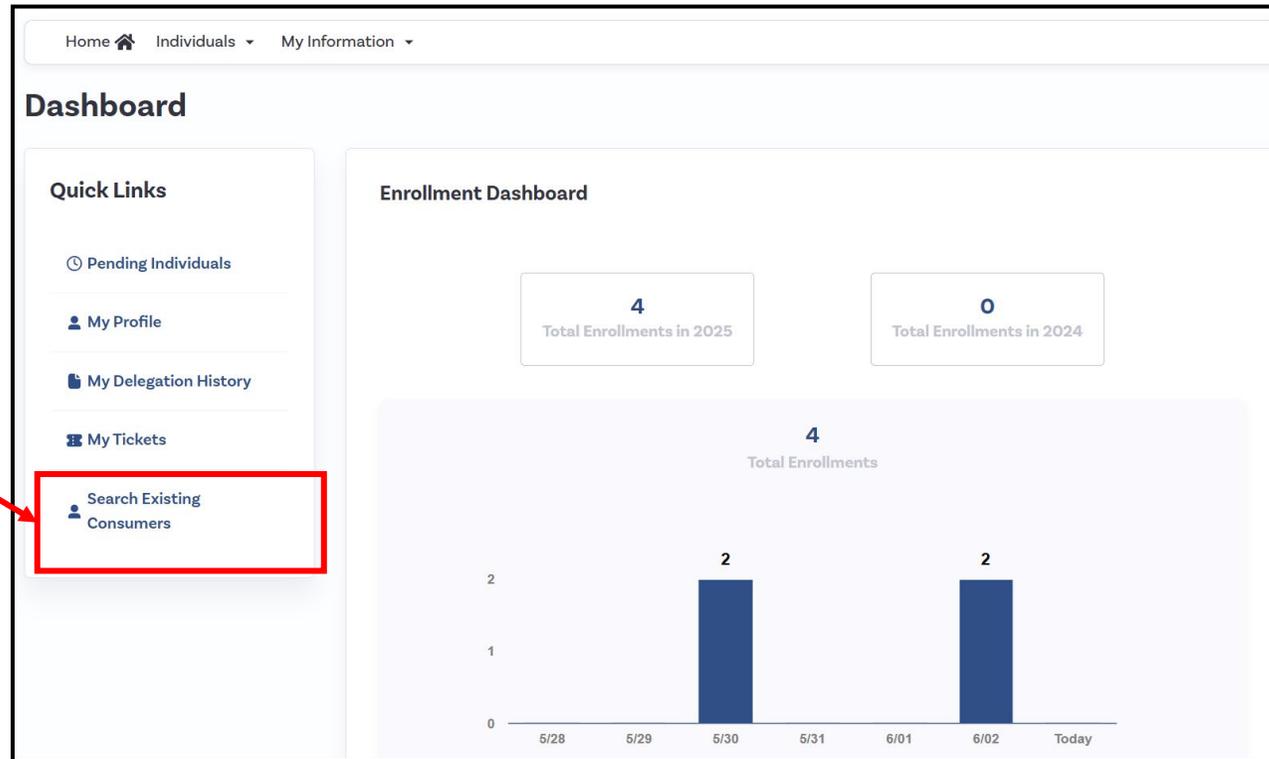
The following slides show how can use the “Search for Existing Customer” tool to designate themselves to an existing customer or create a new account if the customer does not have one. The high-level process is below:

1. Broker selects “Search Existing Consumers” from their dashboard.
2. Broker inputs consumer’s Name and DOB as well as a document to verify that the broker has consent.
3. Broker inputs consumer’s full SSN and DOB.
4. Broker confirms that they would like to Claim this customer and add them to their Book of Business.

***NOTE: The slides are from a test environment and do not reflect Get Covered Illinois’ finalized language/content that will be displayed in the portal.***

# Detailed Walkthrough: Search for Existing Customer

**Step 1:** Select “Search Existing Consumers” from your dashboard:



**Note:** This process can only be used if the customer has an SSN. If the customer does not have an SSN, the broker can call the CAC for designation assistance if the customer is not able to log-in to their account.

# Detailed Walkthrough: Search for Existing Customer

**Step 2:** The broker attests that they have permission to work with the consumer and inputs their name, DOB, a Document Number for Verification, and Method of Verification (Phone or In-Person).

### Search For Existing Consumer

I attest I have the permission to perform this search, and that the information provided to me to verify the consumer's identity is correct to the best of my knowledge.\*

Please fill in all of the fields below to verify the consumer's identity.

First Name*	Last Name*	Date of Birth*
<input type="text"/>	<input type="text"/>	<input type="text" value="MM/DD/YYYY"/>
Document Type*	Document Number*	Method*
<input type="text" value="Select"/>	<input type="text"/>	<input type="text" value="Select"/>

**Step 3:** The Document Type dropdown is for the broker to select what document they will be using for verification.

### Select

- Certificate of Naturalization
- Certificate of Naturalization (Form N-550 or N-570) or US Citizenship (Form N-560 or N-561)
- Divorce Decree
- Driver's License issued by state or territory
- Employer Identification Card
- Employment Authorization Document that contains a photograph (Form I-766)
- Foreign passport or ID issued by a foreign embassy or consulate contains a photograph
- High School or College diploma (including high school equivalency diplomas)
- Identification Card Issued by the Federal, State or Local Government
- Marriage Certificate
- Military dependent's identification card
- Native American Tribal document
- Permanent Resident Card or Alien Registration Receipt Card (Form I-551)
- Property Deed or Title
- School identification card
- Social Security Card
- U.S Coast Guard Merchant Mariner card
- U.S.Public Birth Record
- U.S military card or draft record

<input type="text" value="Select"/>	<input type="text"/>	<input type="text" value="Select"/>
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# Detailed Walkthrough: Search for Existing Customer

**Step 4:** After inputting all required fields, select “Continue.”

**Search For Existing Consumer**

I attest I have the permission to perform this search, and that the information provided to me to verify the consumer's identity is correct to the best of my knowledge. \*

Please fill in all of the fields below to verify the consumer's identity.

First Name*	Last Name*	Date of Birth*
Muffet	Sterling	08/07/1997
Document Type*	Document Number*	Method*
Driver's License issued by stat. ▾	123456789	Over Phone ▾

**Continue**

**Step 5:** Input the consumer's full SSN and DOB, and select “Search.”

**Fetch Existing Consumer**

Search by SSN

Social Security Number*	Date of Birth*
XXX-XX-XXXX	08/07/1997

**Search**

# Detailed Walkthrough: Search for Existing Customer

**Step 6:** If the information matches an existing consumer, the consumer's full information will appear. If this is the correct person, select "Claim Consumer."

### Fetch Existing Consumer

Search by SSN

Social Security Number\*

Date of Birth\*

Muffet Sterling

DOB	08/07/1997
Address	123 Main Street, Chicago, IL 60601
Phone	8126062725
SSN	XXX-XX-6789

**Step 7:** Select "Yes" to confirm that you will become this consumer's Agent of Record.

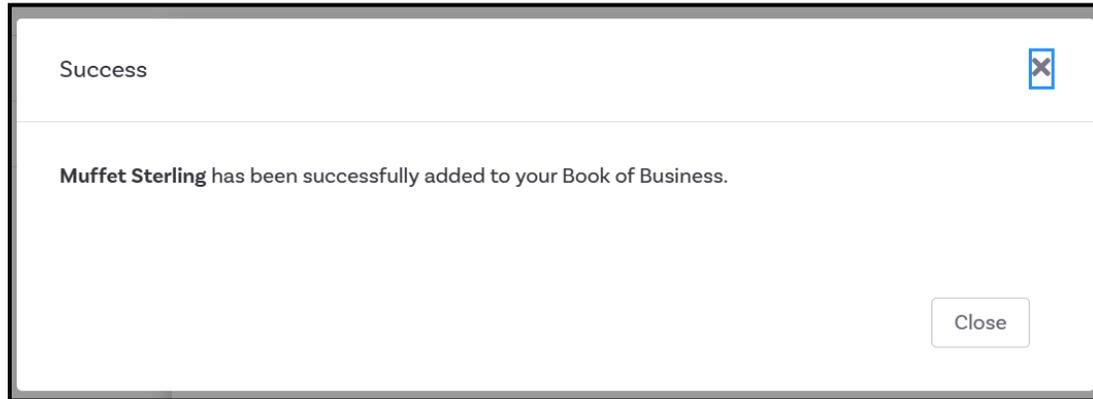
Are you sure?

**Are you sure you want to become the Agent of Record for Muffet Sterling?**

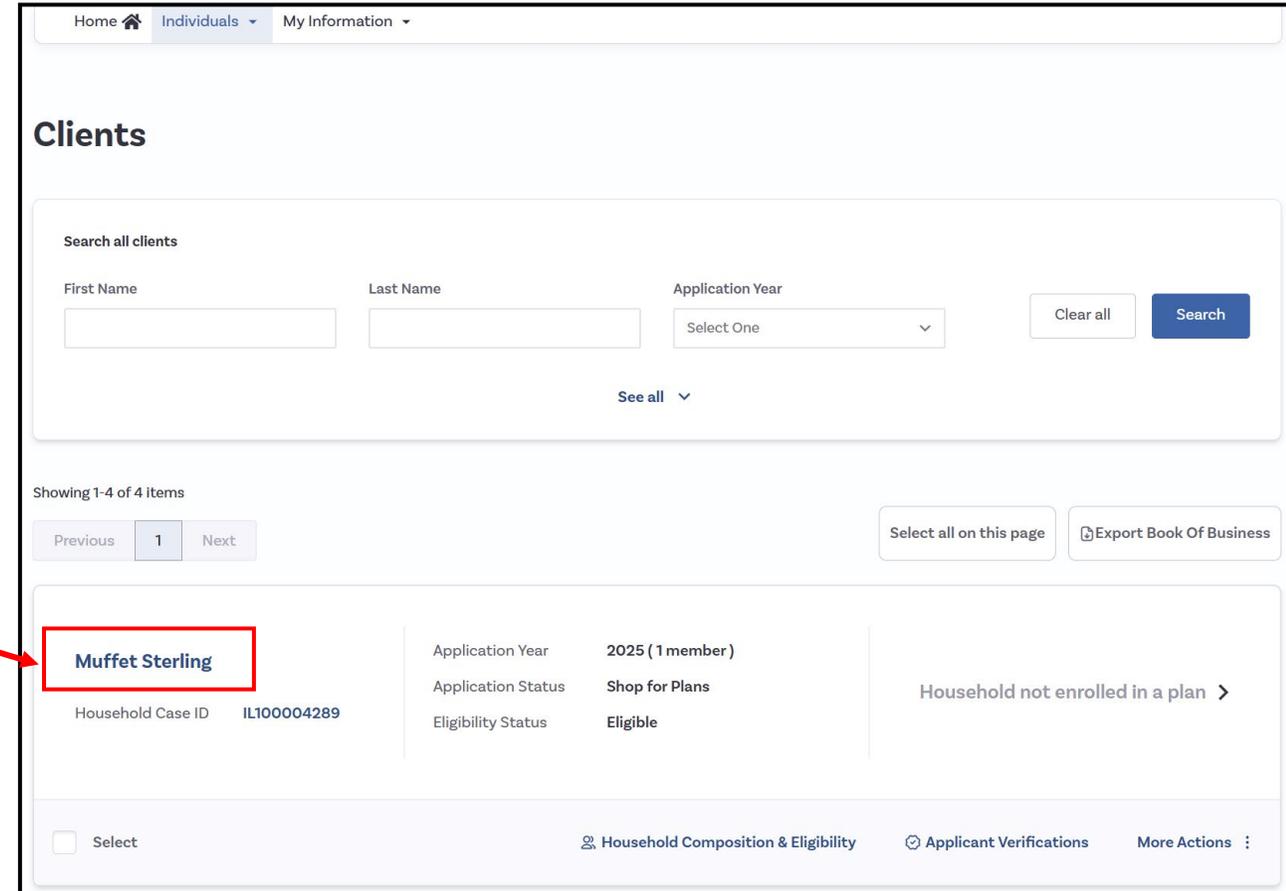
If you click "Yes," **Muffet Sterling** will be added to your Book of Business. You can then access the consumer's applications and other details to help them with enrollment.

# Detailed Walkthrough: Search for Existing Customer

**Step 8:** The broker will receive a success message that the consumer has been added to their Book of Business.



**Step 9:** The new consumer will now appear in the broker's Book of Business on the "Active Individuals" tab.



# Detailed Walkthrough: Add New Customers

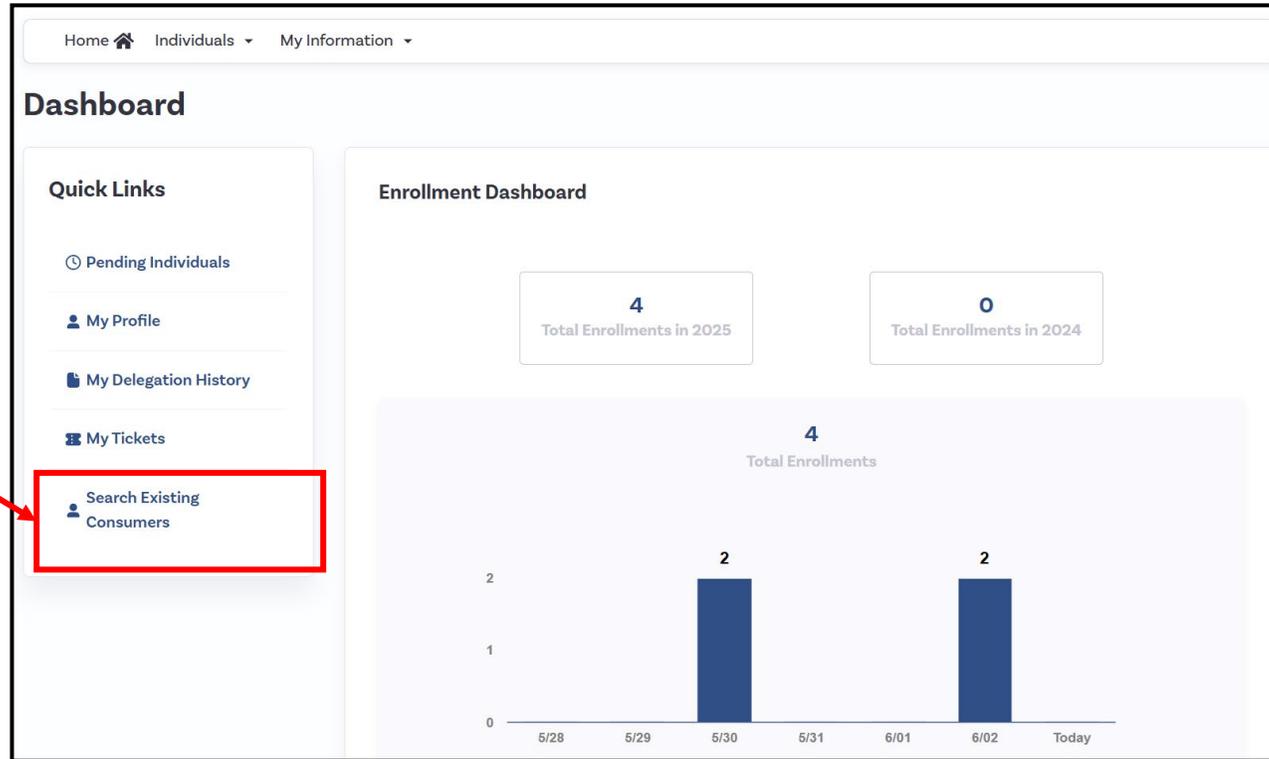
If a broker needs to create an account for a customer that does not yet have one, the broker will start with the “Search for Existing Consumer” flow to ensure that the customer has not created an account. If the customer does not have an account, the broker will be prompted to create one.

1. Broker selects “Search Existing Consumers” from their dashboard.
2. Broker inputs consumer’s Name and DOB as well as a document to verify that the broker has consent.
3. Broker inputs consumer’s full SSN and DOB.

***NOTE: The slides are from a test environment and do not reflect Get Covered Illinois’ finalized language/content that will be displayed in the portal.***

# Detailed Walkthrough: Add New Individual

**Step 1:** Select “Search Existing Consumers” from your dashboard:



**Note:** This process can only be used if the customer has an SSN. If the customer does not have an SSN, the broker can call the CAC for designation assistance if the customer is not able to log-in to their account.

# Detailed Walkthrough: Search for Existing Customer

**Step 2:** The broker attests that they have permission to work with the consumer and inputs their name, DOB, a Document Number for Verification, and Method of Verification (Phone or In-Person).

**Step 3:** The broker selects continue after inputting all information.

**Search For Existing Consumer**

I attest I have the permission to perform this search, and that the information provided to me to verify the consumer's identity is correct to the best of my knowledge. \*

Please fill in all of the fields below to verify the consumer's identity.

First Name*	Last Name*	Date of Birth*
<input type="text"/>	<input type="text"/>	<input type="text" value="MM/DD/YYYY"/>
Document Type*	Document Number*	Method*
<input type="text" value="Select"/>	<input type="text"/>	<input type="text" value="Select"/>

**Search For Existing Consumer**

I attest I have the permission to perform this search, and that the information provided to me to verify the consumer's identity is correct to the best of my knowledge. \*

Please fill in all of the fields below to verify the consumer's identity.

First Name*	Last Name*	Date of Birth*
<input type="text" value="Blair"/>	<input type="text" value="Zanderson"/>	<input type="text" value="03/19/1986"/>
Document Type*	Document Number*	Method*
<input type="text" value="Driver's License issued by stat"/>	<input type="text" value="4444444444"/>	<input type="text" value="In Person"/>

# Detailed Walkthrough: Search for Existing Customer

**Step 4:** The broker inputs their full SSN and DOB, and then selects “Search.”

Fetch Existing Consumer

Search by SSN

Social Security Number\* 111-22-3333

Date of Birth\* 03/19/1986

Search

**Step 5:** If the system does not find a matching account for this customer, the broker is prompted to Start a New Application for this individual.

Fetch Existing Consumer

Search by SSN

Social Security Number\* 111-22-3333

Date of Birth\* 03/19/1986

Search

No match found

Based on the details you provided, we were unable to make a match to our database. If you would like to start a new application, please select the Start A New Application button to begin the process. If you would like to try again, please select the Cancel button to re-enter details.

Cancel Start new application

# Detailed Walkthrough: Search for Existing Customer

**Step 6:** The broker inputs the customer's Name, DOB, Zip Code, and Email Address (if Available) and selects "Start"

**Create Individual Record**

About Individual

Enter information for the individual to create a record prior to acting on the individual's behalf.

Individual Information

First Name \* Blair

Last Name \* Zanderson

Date Of Birth \* 03/19/1986

Zip Code \* 60601

Phone Number \* (610) 555-5555

Email Address

Note: If email is provided the new individual will be sent an email to activate a new account.

Cancel Start

**Step 7:** The Broker selects "Individual View" to proceed to the customer's account.

**View Individual Account**

Clicking "Individual View" will take you to the Individual's Portal for Blair Zanderson. Through this portal you will be able to enroll on behalf of the individual.

Proceed to Individual View?

Don't Show this message again

Cancel Individual View

# Detailed Walkthrough: Search for Existing Customer

**Step 8:** The broker is now designated to the customer and is directed to their individual account. The broker can now complete an application on the customer's behalf.

Additionally, the broker can see their information in the upper righthand corner of their account.

Viewing Individual Account (Blair Zanderson) My Account

## Welcome, Blair Zanderson

My Stuff

- My Dashboard
- My Applications
- My Eligibility Results
- My Enrollments
- My Inbox
- My Tickets
- My Preferences

Quick Links

- Find Local Assistance

2025

### Next Steps

You missed the open enrollment period for 2025 to shop and enroll in a health plan. You can still enroll if you have a Qualifying Life Event.

[Start New Application](#)

### Overview

#### Your Application Status (Your Case ID is IL100004557)

Application	Status	Action
2025 Application	Not started	<a href="#">Start Application</a>

#### Your Household Eligibility

Your household member and eligibility information will show up here once you have completed your application.

# Agenda

## ✓ Get Covered Illinois Broker Certification

### Overview of Broker Functionality

#### ✓ • Broker Portal

- ✓ • Managing Book of Business
- ✓ • View Member Account
- ✓ • Customer Designations

#### • Agency Portal

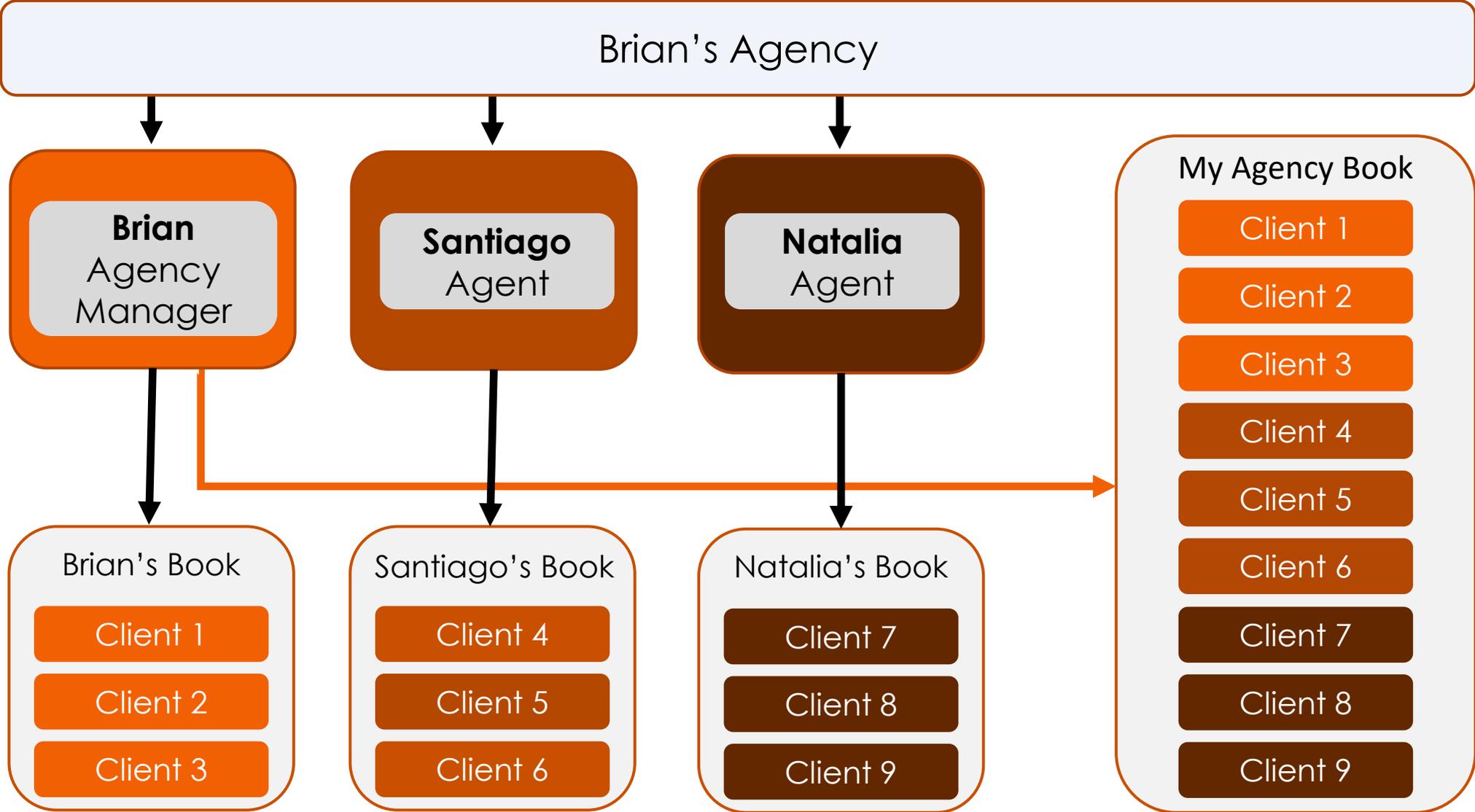
- Manage Agency Book of Business
- Accept Customer Designations
- View Member Account
- Transfer Customer within Agency

# Broker Portal: Agency Model

Get Covered Illinois provides brokers with support using an Agency Model. All brokers will be connected to an Agency and will be one of two main roles: (1) Agency Manager and (2) Broker

Role	Definition
<b>Broker</b>	The Broker role is a certified broker who can: <ul style="list-style-type: none"><li>• Manage their Book of Business, and</li><li>• Take action on behalf of their designated customers.</li></ul>
<b>Agency Manager</b>	The Agency Manager role is a certified broker who can complete all Broker role activities above, <b>PLUS:</b> <ul style="list-style-type: none"><li>• Manage the Book of Business for <u>all brokers</u> in their Agency</li><li>• Take action on behalf of designated customers for <u>all brokers</u> in their Agency</li><li>• Add/Remove brokers from their Agency</li><li>• Monitor certification status of all brokers in their Agency</li></ul>

# Broker Portal: Agency Model



# Agency Manager Capabilities

## Customer Management

- View Delegation Requests for all customers assigned to a broker in their agency
- View all active Clients within their agency
- View the household details and customer information for all clients in their agency
- Act on behalf of all clients in their agency

## Management of Brokers

- View and edit profile of brokers in their agency
- Re-assign individual customer from one broker to another broker within their agency
- Re-assign full books of business from one broker to another broker within their agency
- Add new brokers to their agency
- Monitor certification status of new brokers

The screenshot displays the 'Agents' management interface. At the top, there is a navigation bar with dropdown menus for 'Agents', 'Admin Staff', 'Agency Delegations', 'Agency Account', 'My Delegations', and 'My Agent Profile'. Below this, a 'Refine Results By' section includes a 'Reset All' button and input fields for 'First Name' and 'Last Name'. Underneath, there are radio buttons for 'Agent Status' with options for 'Active' and 'Inactive'. The main content area features a table with the following columns: 'Agent Name', 'Active/Inactive', 'Customers', 'Agent License #', and 'Certification Status'. The table lists four agents: Santiago Loxley (Active, 1 customer, license 87654321, Certified), Natalia Pendleton (Active, 2 customers, license 33445566, Certified), Brian Grove (Active, 1 customer, license 77777777, Certified), and Bianca Lockridge (Active, 0 customers, license 112233456, Pending). Below the table, it indicates 'Showing 1-4 of 4 items' and includes pagination controls with a '1' button highlighted. To the right, there is a 'Rows' dropdown menu set to '10'.

Agent Name	Active/Inactive	Customers	Agent License #	Certification Status
Santiago Loxley	Active	1	87654321	Certified
Natalia Pendleton	Active	2	33445566	Certified
Brian Grove	Active	1	77777777	Certified
Bianca Lockridge	Active	0	112233456	Pending

# Detailed Walkthrough: Agency Manager Capabilities

The following slides demonstrate the following key capabilities of the Agency Manager Role:

1. Accepting Delegations on behalf of any broker within agency
2. Viewing all customers in the agency's book of business
3. Acting on behalf of customers in the agency's book of business
4. Moving a client from one Broker to a different broker within the agency.

**NOTE: The slides are from a test environment and do not reflect Get Covered Illinois' finalized language/content that will be displayed in the portal.**

The screenshot displays the Agency Manager interface for Get Covered Illinois. The top navigation bar includes the logo, a home icon, an envelope icon, and a 'My Account' dropdown. Below the navigation bar is a menu with options: Agents (selected), Admin Staff, Agency Delegations, Agency Account, My Delegations, and My Agent Profile. The main content area is divided into two sections. On the left is a 'Refine Results By' panel with a 'Reset All' link. It contains input fields for 'First Name' and 'Last Name', radio buttons for 'Agent Status' (Active and Inactive), a dropdown for 'Certification Status' (currently showing 'Select Certification Status'), and an input field for 'License Number'. A 'Go' button is at the bottom of this panel. On the right is a table with the following data:

Agent Name	Active/Inactive	Customers	Agent License #	Certification Status
Santiago Loxley	Active	1	87654321	Certified
Natalia Pendleton	Active	2	33445566	Certified
Brian Grove	Active	1	77777777	Certified
Bianca Lockridge	Active	0	112233456	Pending

Below the table, it shows 'Showing 1-4 of 4 items' and a pagination control with buttons for '<<', '<', '1', '>', and '>>'. To the right of the pagination is a 'Rows' dropdown set to '10'.

# Agency Manager Capabilities: Accept Delegation Requests

**Step 1:** Agency Manager navigates to “Pending Delegation Requests” under the “Agency Delegations” tab.

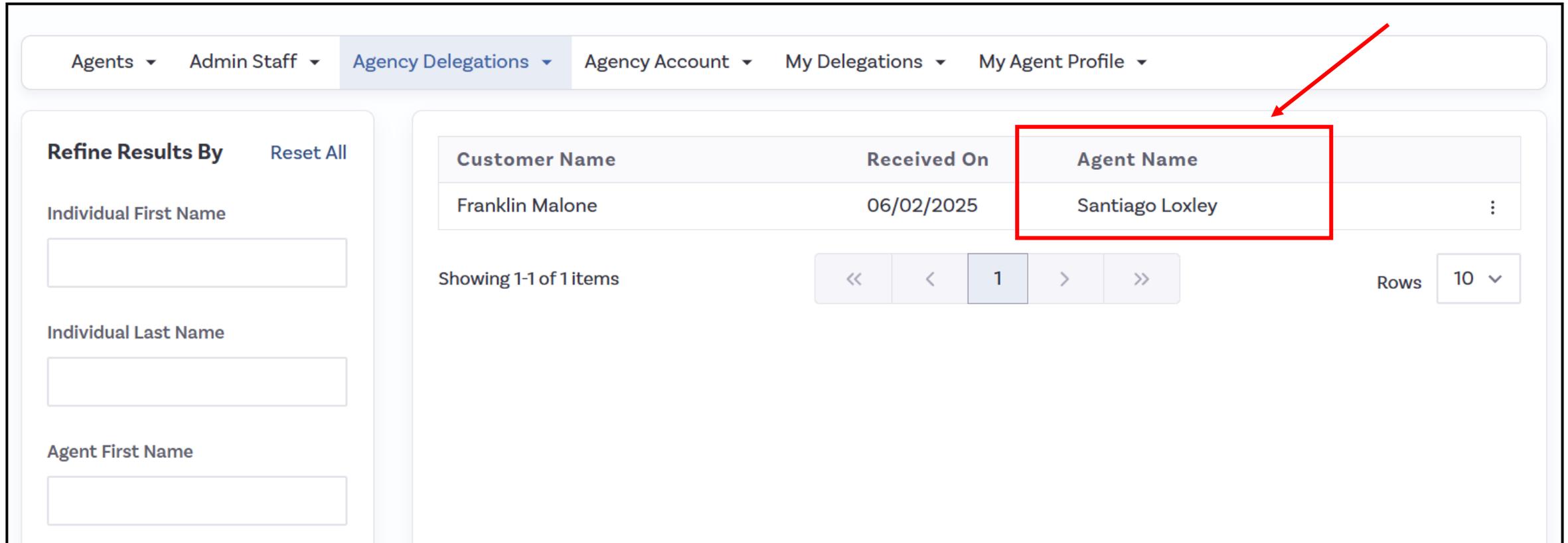
The screenshot displays the Agency Manager interface. At the top, there is a navigation bar with tabs: Agents, Admin Staff, Agency Delegations, Agency Account, My Delegations, and My Agent Profile. The 'Agency Delegations' tab is active, and a sub-menu is open, highlighting 'Pending Delegation Requests' with a red box and a red arrow. Below the navigation bar, there is a 'Refine Results By' section with a 'Reset All' button and input fields for 'First Name' and 'Last Name'. To the right, a table lists delegation requests. The table has columns for 'Active/Inactive', 'Customers', 'Agent License #', and 'Certification Status'. The data rows are as follows:

Active/Inactive	Customers	Agent License #	Certification Status
Active	2	87654321	Certified
Active	3	33445566	Certified
Active	2	77777777	Certified
Active	0	112233456	Pending

Below the table, it says 'Showing 1-4 of 4 items' and includes pagination controls (back, forward, page 1, next, end) and a 'Rows' dropdown set to 10. At the bottom left, there is an 'Agent Status' section with radio buttons for 'Active' and 'Inactive'.

# Agency Manager Capabilities: Accept Delegation Requests

**Step 2:** The Agency Manager can view requests for any agent in their agency. The request below is for Santiago.

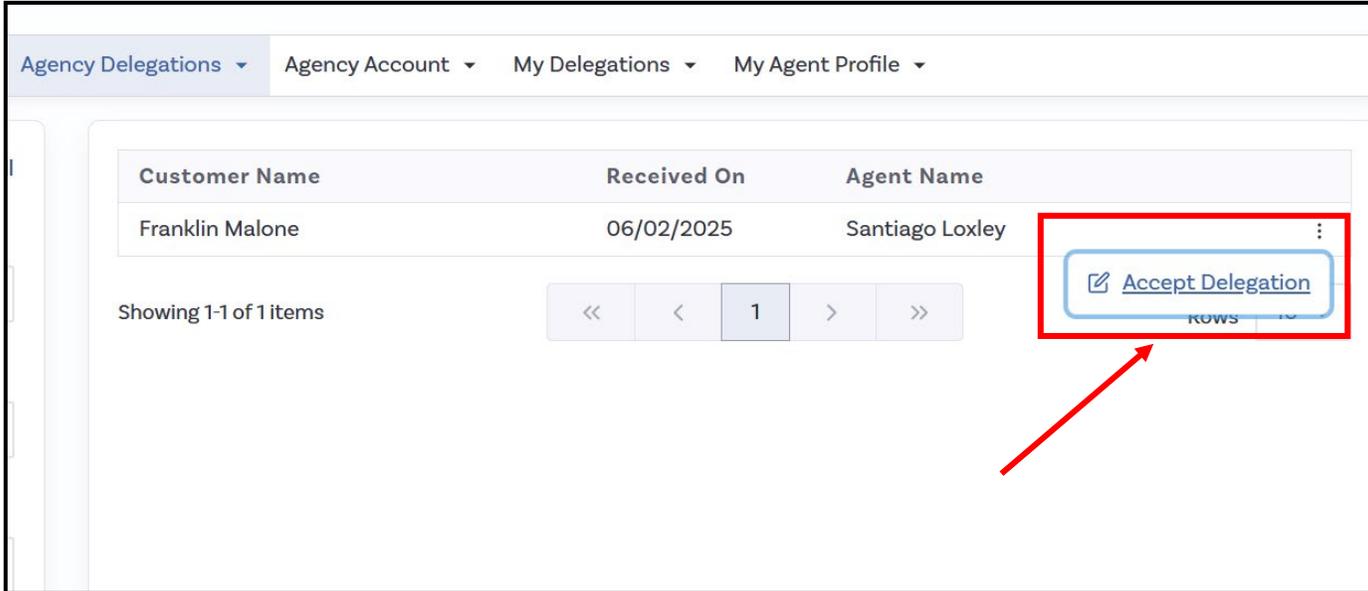


The screenshot displays the Agency Manager interface. At the top, there is a navigation bar with several dropdown menus: Agents, Admin Staff, Agency Delegations (highlighted), Agency Account, My Delegations, and My Agent Profile. On the left side, there is a 'Refine Results By' section with a 'Reset All' link and three input fields for 'Individual First Name', 'Individual Last Name', and 'Agent First Name'. The main content area shows a table with one row of data. The table has three columns: 'Customer Name', 'Received On', and 'Agent Name'. The data in the row is: Franklin Malone, 06/02/2025, and Santiago Loxley. The 'Agent Name' column is highlighted with a red box, and a red arrow points to it from the top right. Below the table, there is a pagination control showing 'Showing 1-1 of 1 items' and a set of navigation buttons (double left arrow, left arrow, '1', right arrow, double right arrow). To the right of the pagination, there is a 'Rows' dropdown menu set to '10'.

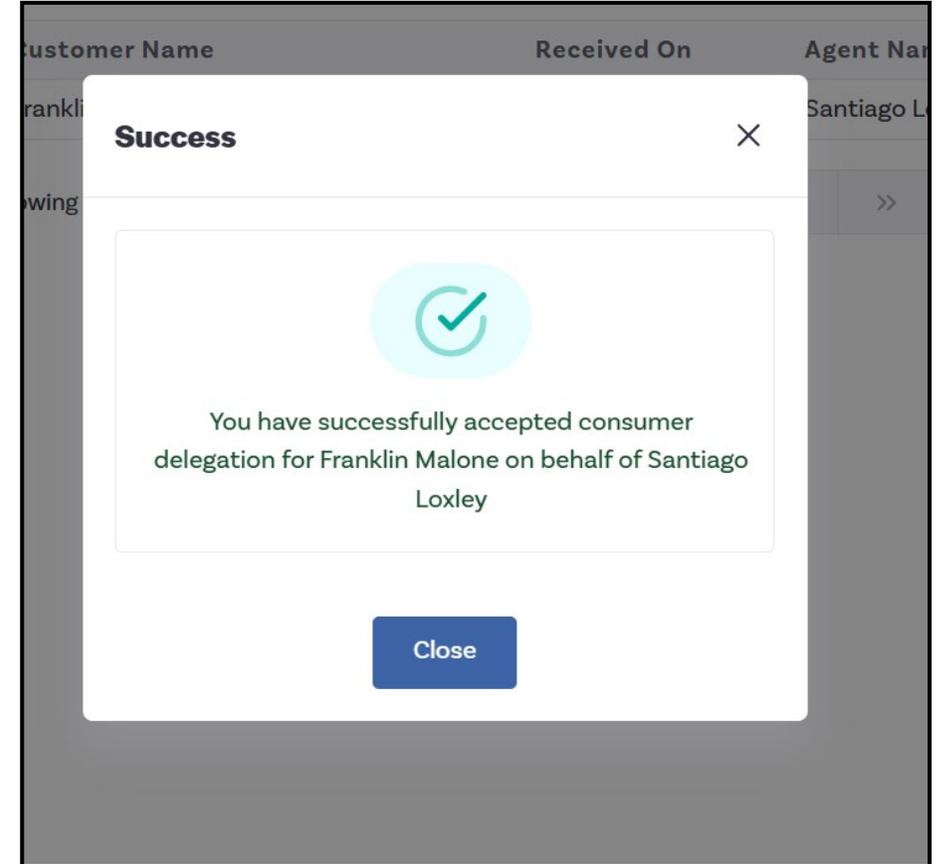
Customer Name	Received On	Agent Name
Franklin Malone	06/02/2025	Santiago Loxley

# Agency Manager Capabilities: Accept Delegation Requests

**Step 3:** The Agency Manager selects “Accept Delegation.”



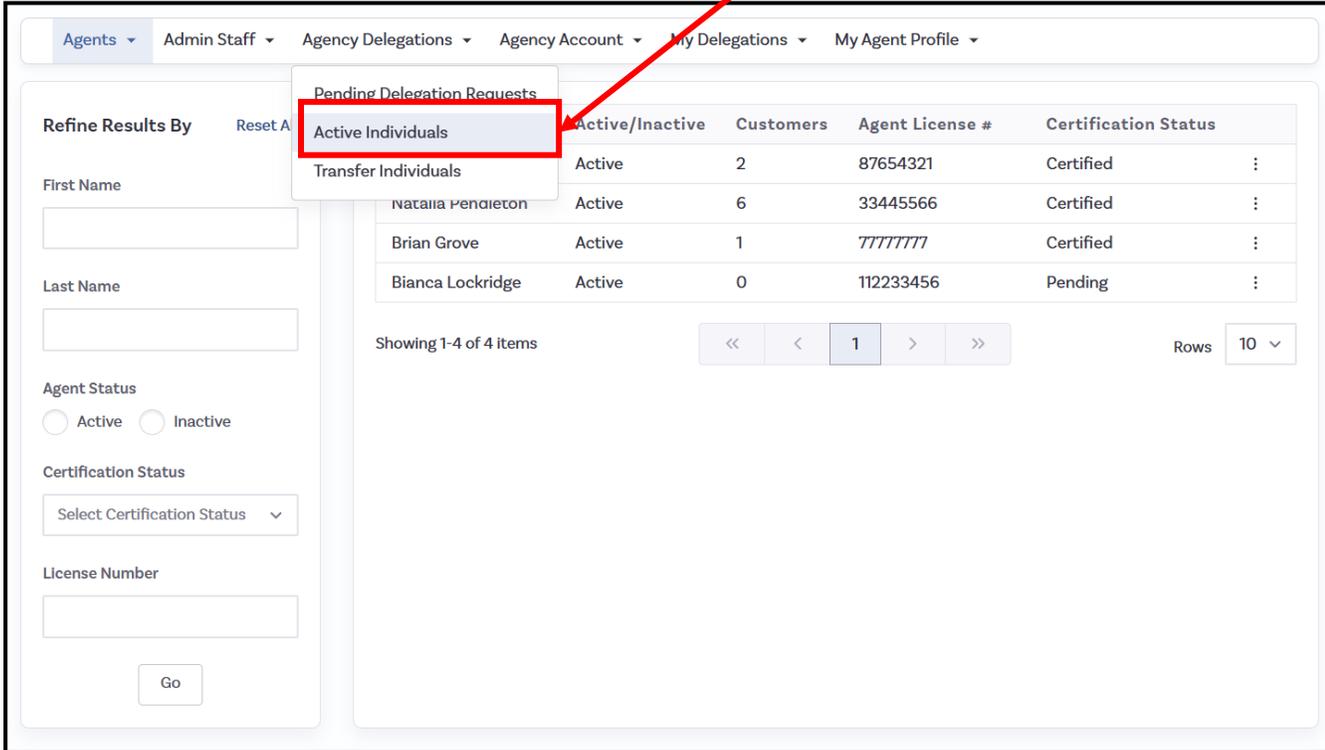
**Step 4:** The Agency Manager receives a success message that delegation was accepted.



# Agency Manager Capabilities: View Individual Account for all Customers in the Book of Business.

The Agency Manager Brian accepted the Delegation request for customer Franklin Malone on behalf of the broker Santiago. The Agency Manager can act on behalf of all customers within their agency.

**Step 1:** The Agency Manager navigates to the “Active Individuals” tab under “Agency Delegations.”



The screenshot displays the Agency Manager interface. At the top, there are navigation tabs: Agents, Admin Staff, Agency Delegations, Agency Account, My Delegations, and My Agent Profile. The 'Agency Delegations' tab is selected, and a dropdown menu is open, highlighting the 'Active Individuals' option. A red arrow points to this option. Below the navigation, there are search filters for First Name and Last Name, and radio buttons for Agent Status (Active/Inactive). A table lists active individuals with columns for Name, Status, Customers, Agent License #, and Certification Status. The table shows four entries: Natalia Penington, Brian Grove, and Bianca Lockridge. The table is paginated to show 1-4 of 4 items.

Active/Inactive	Customers	Agent License #	Certification Status
Active	2	87654321	Certified
Active	6	33445566	Certified
Active	1	77777777	Certified
Active	0	1122334455	Pending

# Agency Manager Capabilities: View Individual Account for all Customers in the Book of Business.

**Step 2:** The Agency Manager can see all customer's in their agency's book of business.

**Clients**

Search all clients

First Name  Last Name  Application Year

Showing 1-9 of 9 items

Previous **1** Next

**Miles Rigal**

Household Case ID IL100004256

Agent Natalia Pendleton  
NPN -

Application Year 2025 (2 members)

Application Status Report a Change

Eligibility Status Conditional

HEALTH PLAN Molina

DENTAL PLAN Dominion

Select

**Blair Zanderson**

Application Year -

**Step 3:** The Agency Manager inputs a broker's First Name and selects "Search" to see all of Santiago's delegations.

**Clients**

Search all clients

First Name  Last Name  Application Year

Application Status

Applicant Verifications

Qualifying Life Event Verifications

Approaching Medicare Age

Binder Payment

Enrollment Deadline

Issuer

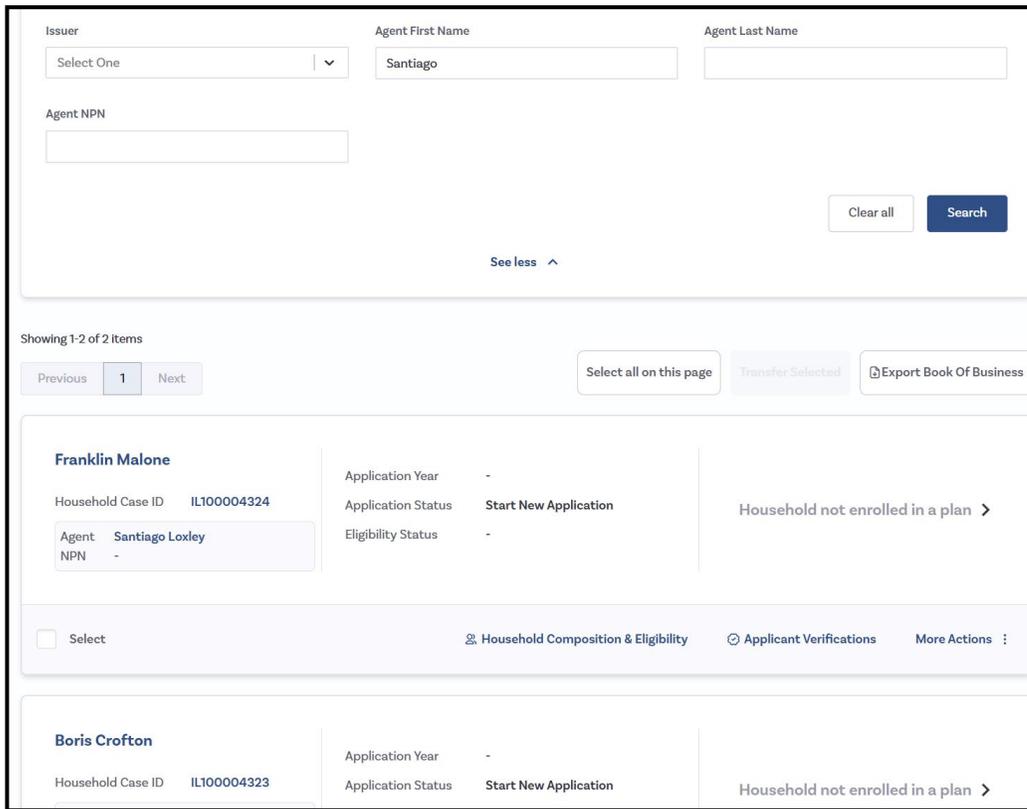
Agent First Name

Agent Last Name

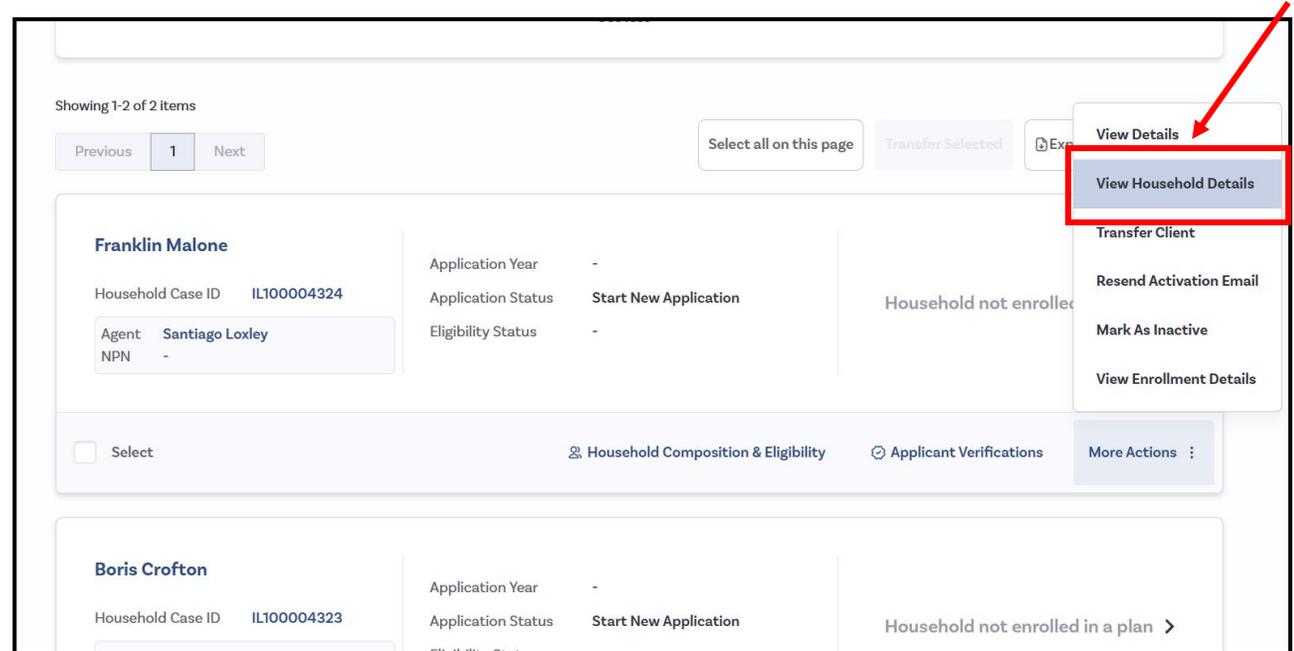
Agent NPN

# Agency Manager Capabilities: View Individual Account for all Customers in the Book of Business.

**Step 4:** The Agency Manager can view all of Santiago's customers.

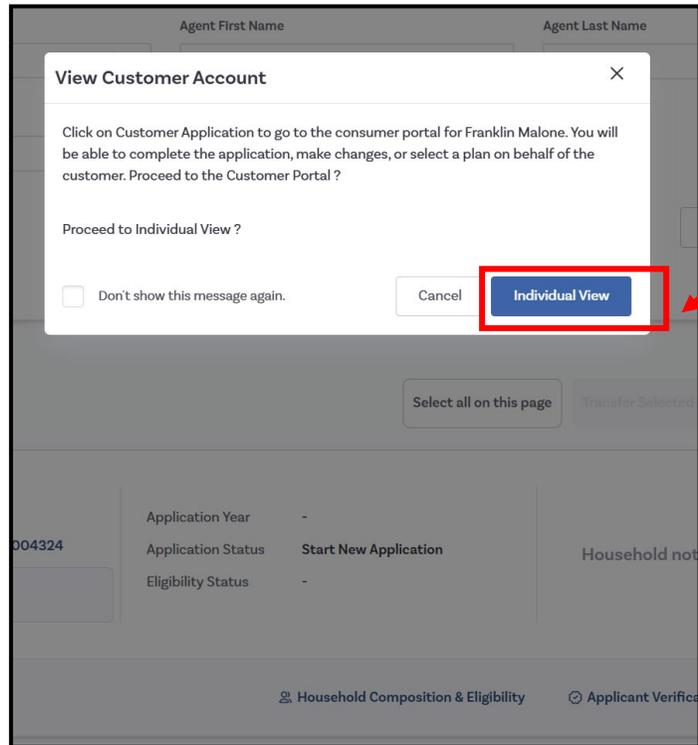


**Step 5:** The Agency Manager navigates to "View Household Details" to see this customer's account.

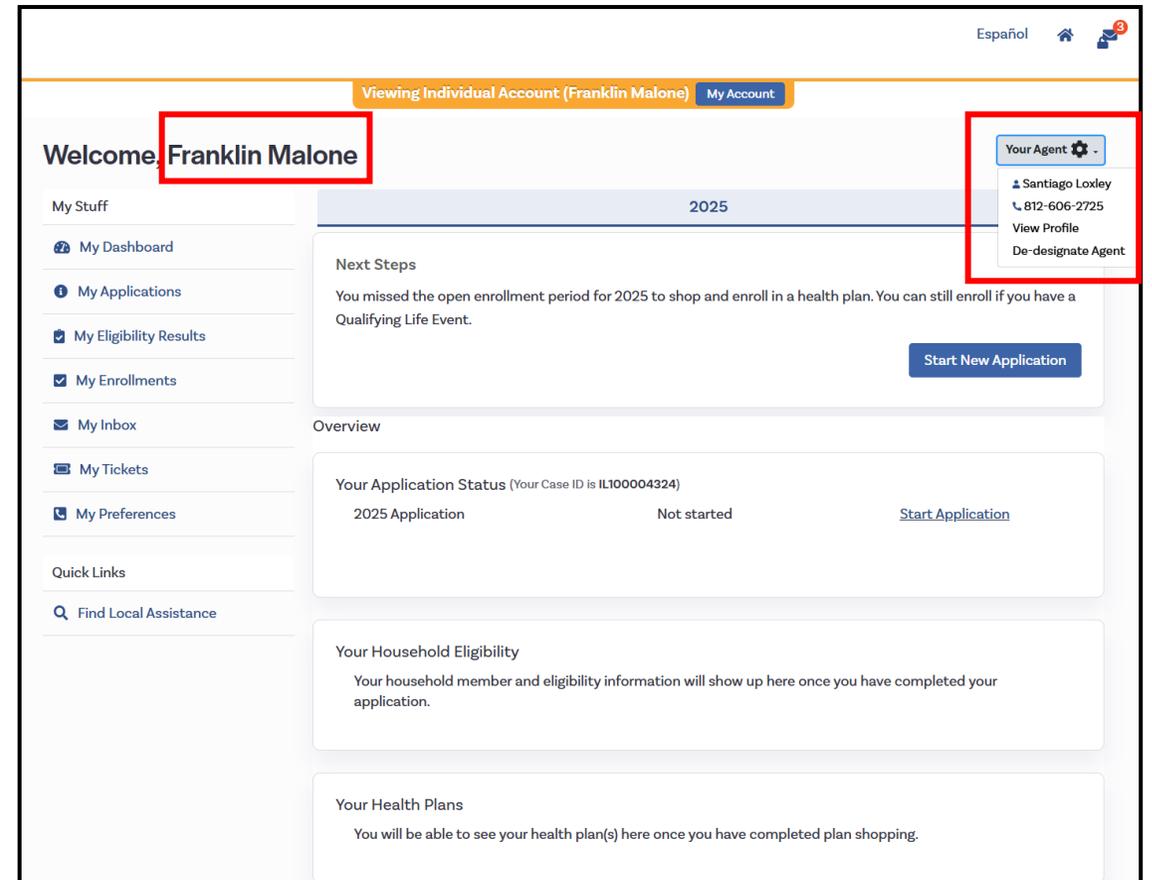


# Agency Manager Capabilities: View Individual Account for all Customers in the Book of Business.

**Step 6:** The Agency Manager selects “Individual View” to see this customer’s account.



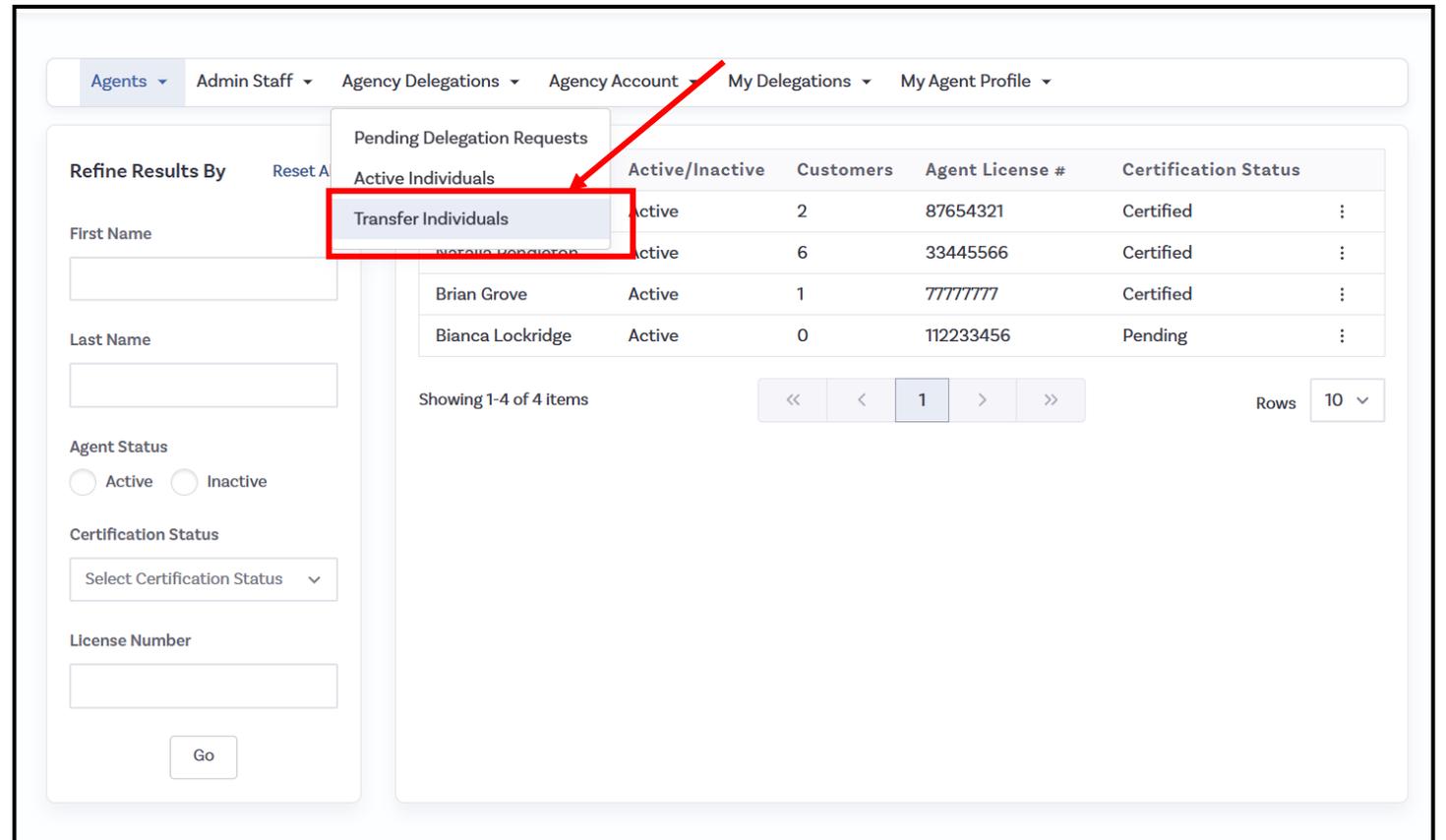
**Step 7:** The Agency Manager can act on behalf of customer Franklin, who is designated to agent Santiago.



# Agency Manager Capabilities: Transfer Consumer from One Broker to Another

The Agency Manager can transfer a customer from one broker to a different broker within their agency. We will transfer the customer Franklin from the broker Santiago to the broker Natalia.

**Step 1:** The Agency Manager navigates to the “Transfer Individuals” tab under “Agency Delegations.”



The screenshot displays the Agency Manager interface. At the top, there are navigation tabs: Agents, Admin Staff, Agency Delegations, Agency Account, My Delegations, and My Agent Profile. The 'Agency Delegations' tab is active, and a dropdown menu is open, showing options: Pending Delegation Requests, Active Individuals, and Transfer Individuals. The 'Transfer Individuals' option is highlighted with a red box and a red arrow. Below the navigation, there is a 'Refine Results By' section with a 'Reset All' button. The main content area shows a table with columns: Active/Inactive, Customers, Agent License #, and Certification Status. The table contains four rows of data. At the bottom, there is a pagination control showing 'Showing 1-4 of 4 items' and a 'Rows' dropdown set to 10.

Active/Inactive	Customers	Agent License #	Certification Status
Active	2	87654321	Certified
Active	6	33445566	Certified
Active	1	77777777	Certified
Active	0	1122334455	Pending

# Agency Manager Capabilities: Transfer Consumer from One Broker to Another

**Step 2:** The Agency Manager can see all clients in their agency. The Agency Manager selects “See all” to expand the search criteria.

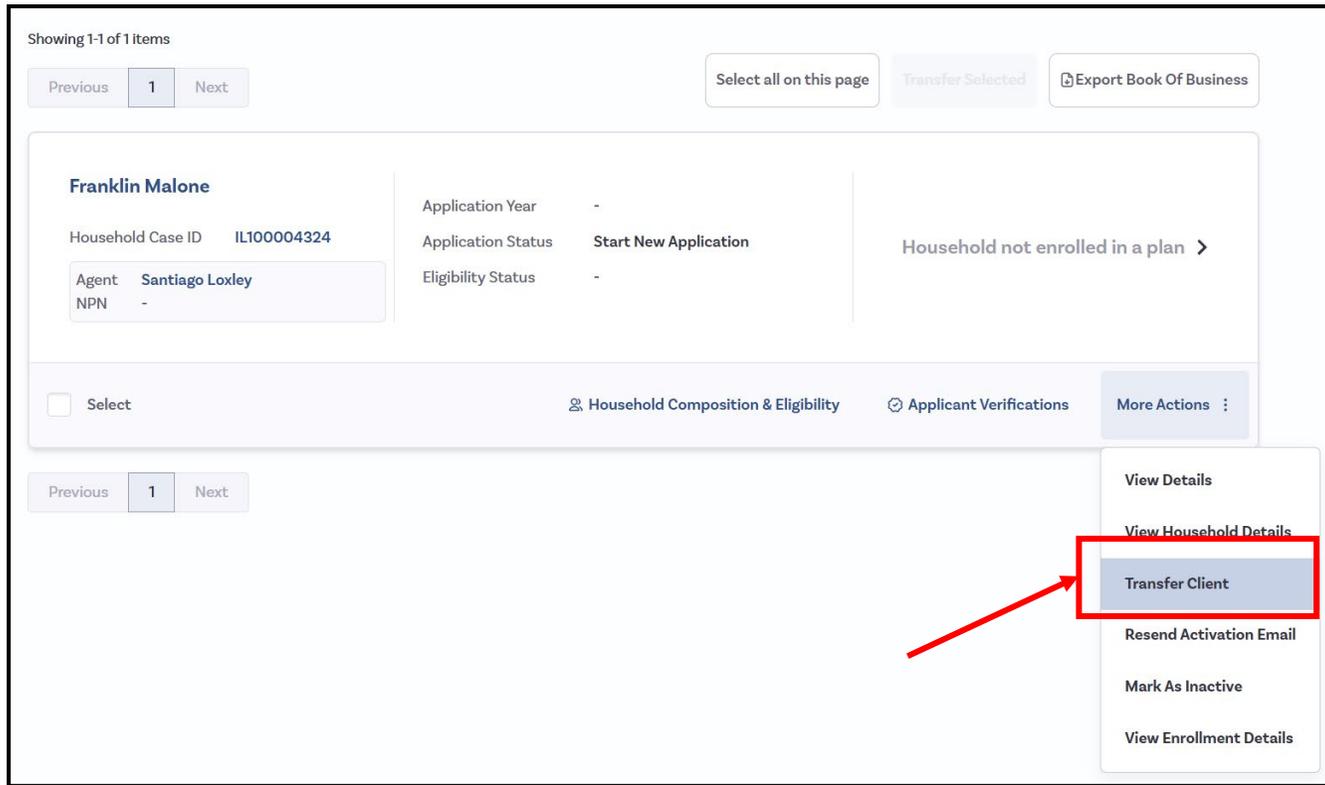
The screenshot shows the 'Clients' search interface. At the top, there is a search bar with the text 'Search all clients'. Below it are three input fields: 'First Name', 'Last Name', and 'Application Year' (with a dropdown menu set to 'Select One'). To the right of these fields are 'Clear all' and 'Search' buttons. A red box highlights the 'See all' button, which has a dropdown arrow, and a red arrow points to it from the right. Below the search bar, there is a pagination section with 'Showing 1-9 of 9 items', 'Previous', '1', and 'Next' buttons. Further down are buttons for 'Select all on this page', 'Transfer Selected', and 'Export Book Of Business'. The main content area displays a client card for 'Miles Rigal' with details like 'Household Case ID: IL100004256', 'Agent: Natalia Pendleton', and 'Application Year: 2025 (2 members)'. At the bottom, there are links for 'Household Composition & Eligibility', 'Applicant Verifications', and 'More Actions'.

**Step 3:** The Agency Manager adds the first name of the customer, Franklin, and selects “Search.”

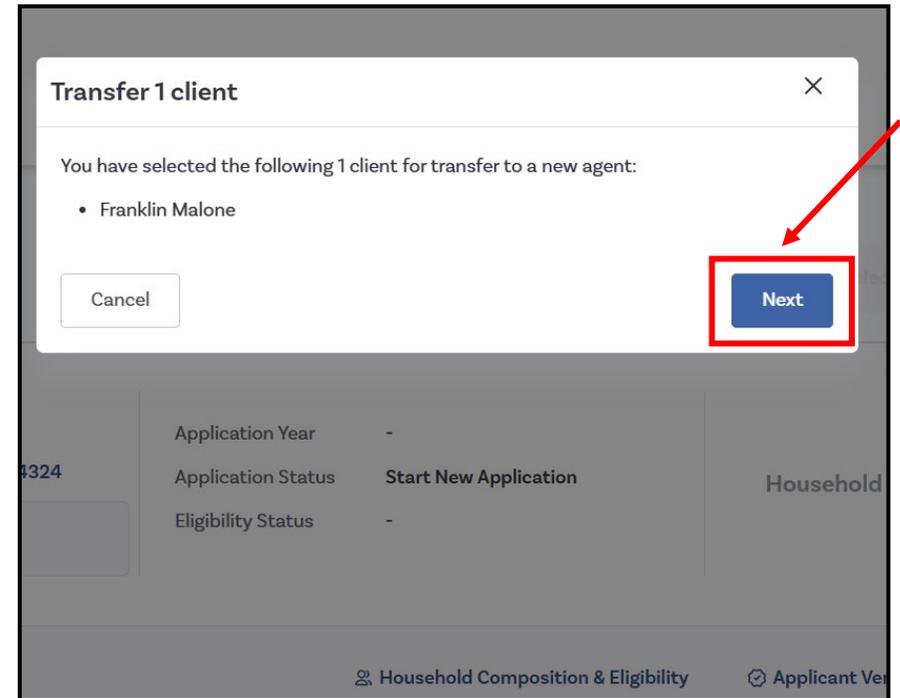
The screenshot shows the 'Clients' search interface with the 'First Name' field filled with 'Franklin'. A red box highlights this field. Below the search bar, there are several dropdown menus for 'Application Status', 'Applicant Verifications', 'Qualifying Life Event Verifications', 'Approaching Medicare Age', 'Binder Payment', 'Enrollment Deadline', 'Issuer', 'Agent First Name', and 'Agent Last Name'. At the bottom right, there are 'Clear all' and 'Search' buttons. A red box highlights the 'Search' button, and a red arrow points to it from the right. At the bottom center, there is a 'See less' link with an upward arrow.

# Agency Manager Capabilities: Transfer Consumer from One Broker to Another

**Step 4:** The Agency Manager selects “More Actions” then “Transfer Client” for the customer to be transferred.



**Step 5:** The Agency Manager confirms the customer to transfer and selects “Next.”



# Agency Manager Capabilities: Transfer Consumer from One Broker to Another

**Step 6:** The Agency Manager enters the name of the broker to receive the transfer and selects “Search.”

Transfer 1 client

Search for an agent to transfer to

First name: Natalia  
Last name:   
Site: Select One  
Email address:   
Certification number:   
Agent NPN:   
Clear all Search

Select an agent and click Next

Select	Agent name	Status	Email address	Site
<input type="checkbox"/>	Natalia Pendleton	Active	natalia-123@yopmail.com	123 Main Street, Chicago, IL 60224

Back Next

To see a list of Agents, please enter information in the search box(es) above.

**Step 7:** The Agency Manager selects the Broker and clicks “Next.”

Transfer 1 client

Search for an agent to transfer to

First name: Natalia  
Last name:   
Site: Select One  
Email address:   
Certification number:   
Agent NPN:   
Clear all Search

Select an agent and click Next

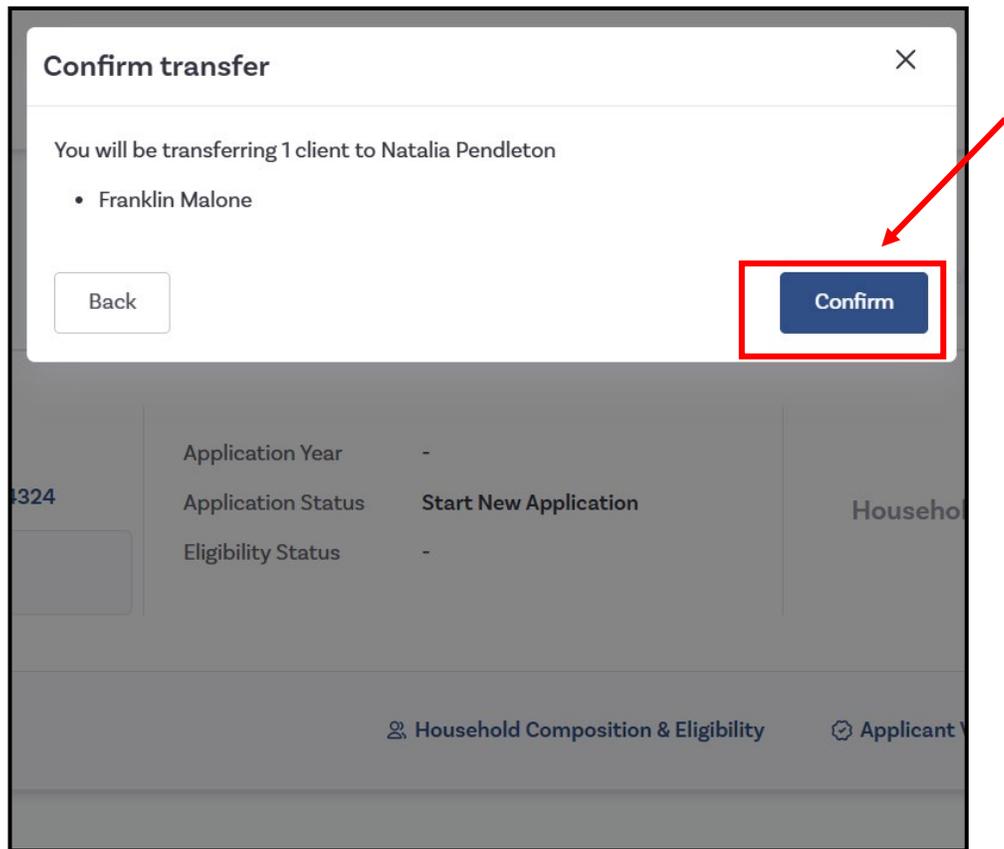
Select	Agent name	Status	Email address	Site
<input checked="" type="radio"/>	Natalia Pendleton	Active	natalia-123@yopmail.com	123 Main Street, Chicago, IL 60224

Previous 1 Next

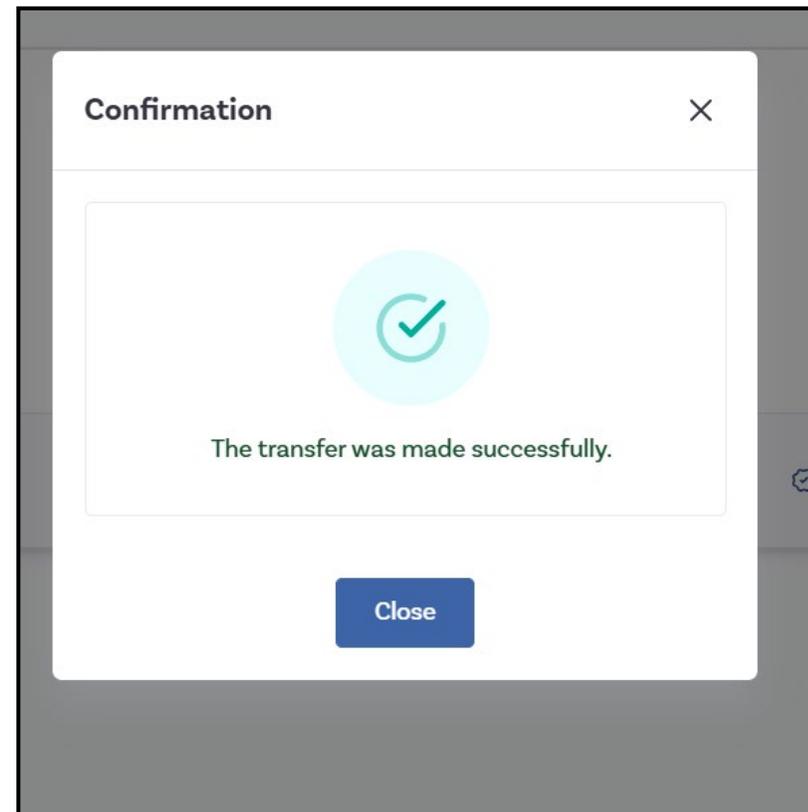
Back Next

# Agency Manager Capabilities: Transfer Consumer from One Broker to Another

**Step 7:** The Agency Manager selects “Confirm.”



**Step 8:** The Agency Manager receives a successful confirmation message.



# Agency Manager Capabilities: Transfer Consumer from One Broker to Another

**Step 9:** The customer Franklin is now delegated to the broker Natalia.

Showing 1-1 of 1 items

Previous 1 Next

Select all on this page Transfer Selected Export Book Of Business

**Franklin Malone**

Household Case ID IL100004324

Agent **Natalia Pendleton**  
NPN -

Application Year -  
Application Status Start New Application  
Eligibility Status -

Household not enrolled in a plan >

Select Household Composition & Eligibility Applicant Verifications More Actions ⋮

Previous 1 Next

# Agenda

## ✓ Get Covered Illinois Broker Certification

### Overview of Broker Functionality

#### ✓ • Broker Portal

- Managing Book of Business
- View Member Account
- Customer Designations

#### ✓ • Agency Portal

- Manage Agency Book of Business
- Accept Customer Designations
- View Member Account
- Transfer Customer within Agency

## Next Steps & Resources

# Next Get Covered Illinois Broker Webinar

Join us for our next webinar!

**Thursday, July 17, 2025, 11:00 AM CDT**

## Broker Webinar Resources:

<https://getcovered.illinois.gov/resources/broker-webinar-material.html>

- Recordings of Past Webinars
- Slide Decks
- FAQs
- Broker Transition Information [Form](#)

**Please complete the post-webinar survey that will pop up on your screen at the end of the webinar.**

**Thank you!**