

# Get Covered Illinois **Broker Webinar**

Thursday, July 17, 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** will soon be available on the Get Covered Illinois [website](#)!
- Please complete the post-webinar survey that will pop up on your screen after exiting the webinar.

# Training and Certification Requirements

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Carol West

# 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.



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

# The Get Covered Illinois Learning Management System

- Email Communication when training is live.
- You will receive a link to create an account.
- You will be asked to enter both your IDOI License number and your NPN numbers.
- 7 Units
- 2 of the modules are pre-requisites and will not be repeated next year.
- Approximately 6 hrs to complete.
- CE credits will be available.



My Dashboard Carol W

## Welcome to Get Covered Illinois

Official Illinois Marketplace Training and Certification System



### Choose Your Learning Path



**Maintain a License with the Illinois Department of Insurance with a health line of authority.**

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

**Complete online training and the score 80% on the post-training assessment.**

**Sign the Get Covered Illinois User's Agreement.**

## **Steps to Becoming a Get Covered Illinois-Certified Broker**

# Broker Data Migration

A thick, hand-drawn style orange line that spans horizontally across the slide, positioned below the title.

Brian Gorman

# 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 Thursday, 8/7/25.**
- 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).

# Marketplace Integrity and Affordability Final Rule

**Join us for our August webinar to learn about the Final Rule and role of Get Covered Illinois brokers.**

# Overview of Get Covered Illinois Broker Portal

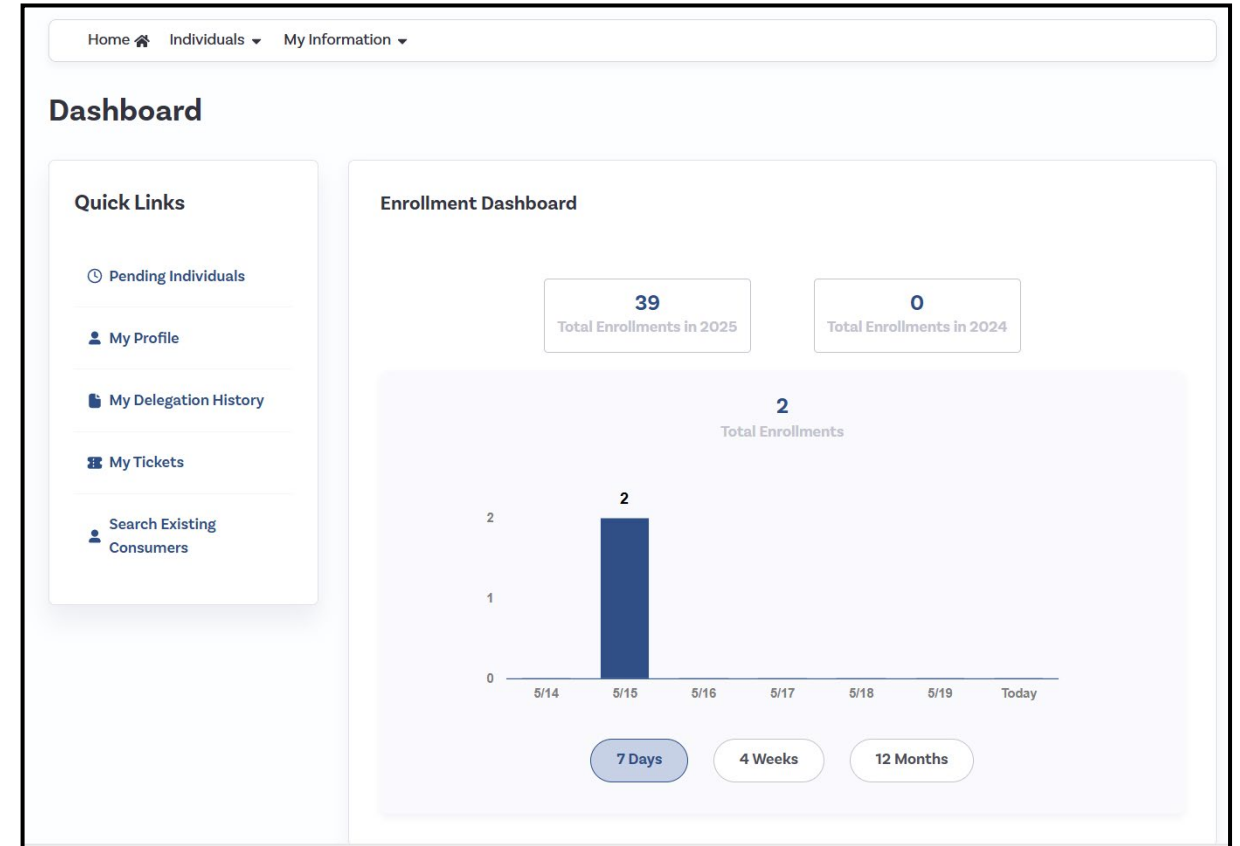
The Get Covered Illinois Broker Portal is a dedicated module optimized for Get Covered Illinois-certified brokers to provide support to their customers.

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

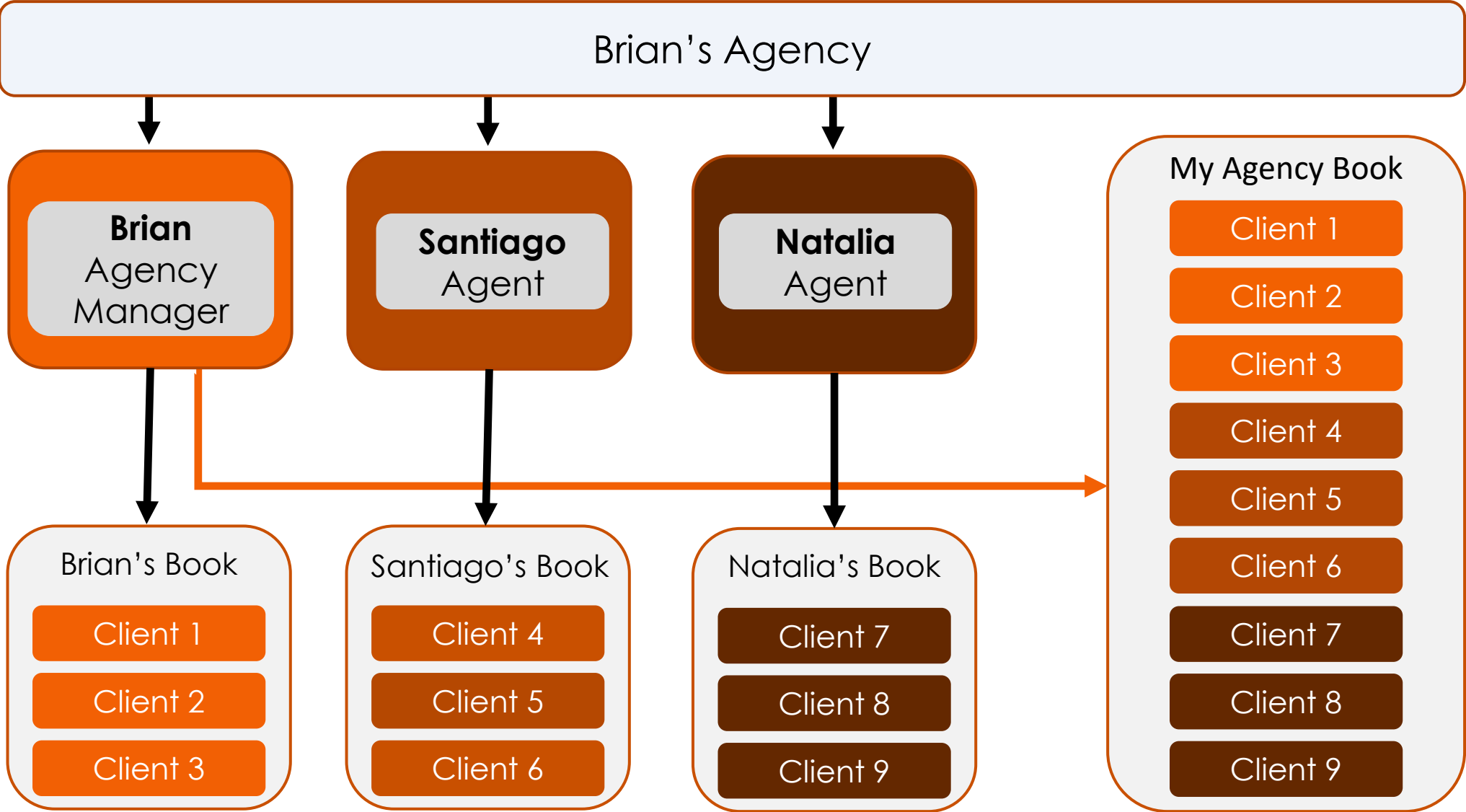


# Broker Portal: Agency Model

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
Broker	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>
Agency Manager	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' tab in the Agency Manager interface. The top navigation bar includes links for Agents, Admin Staff, Agency Delegations, Agency Account, My Delegations, and My Agent Profile. On the left, there is a 'Refine Results By' section with input fields for First Name and Last Name, a 'Reset All' button, and an 'Agent Status' section with radio buttons for Active and Inactive. The main area features 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

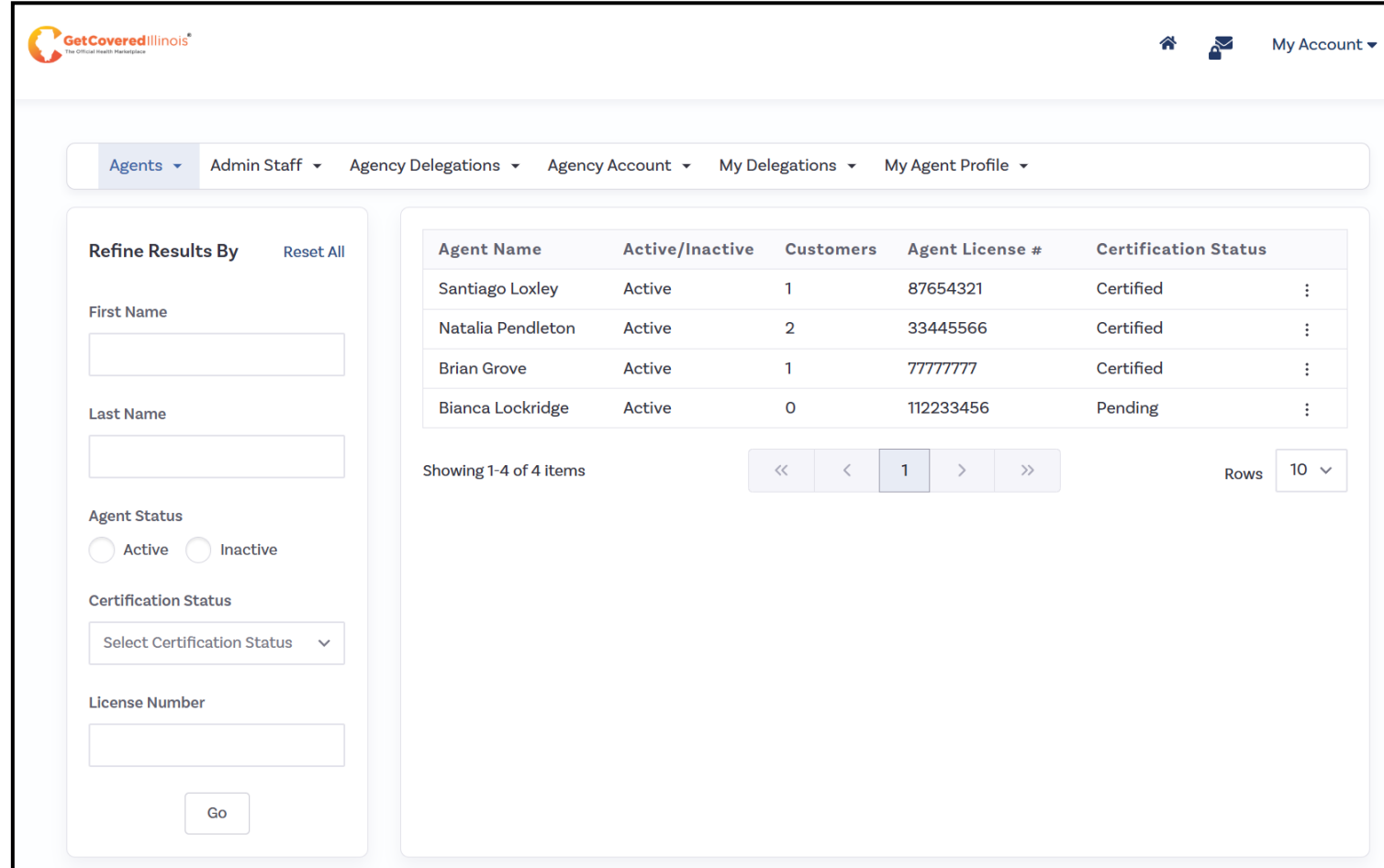
Below the table, it indicates 'Showing 1-4 of 4 items' and includes pagination controls with arrows and a page number '1'. A 'Rows' dropdown menu is set to '10'.

# 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.**

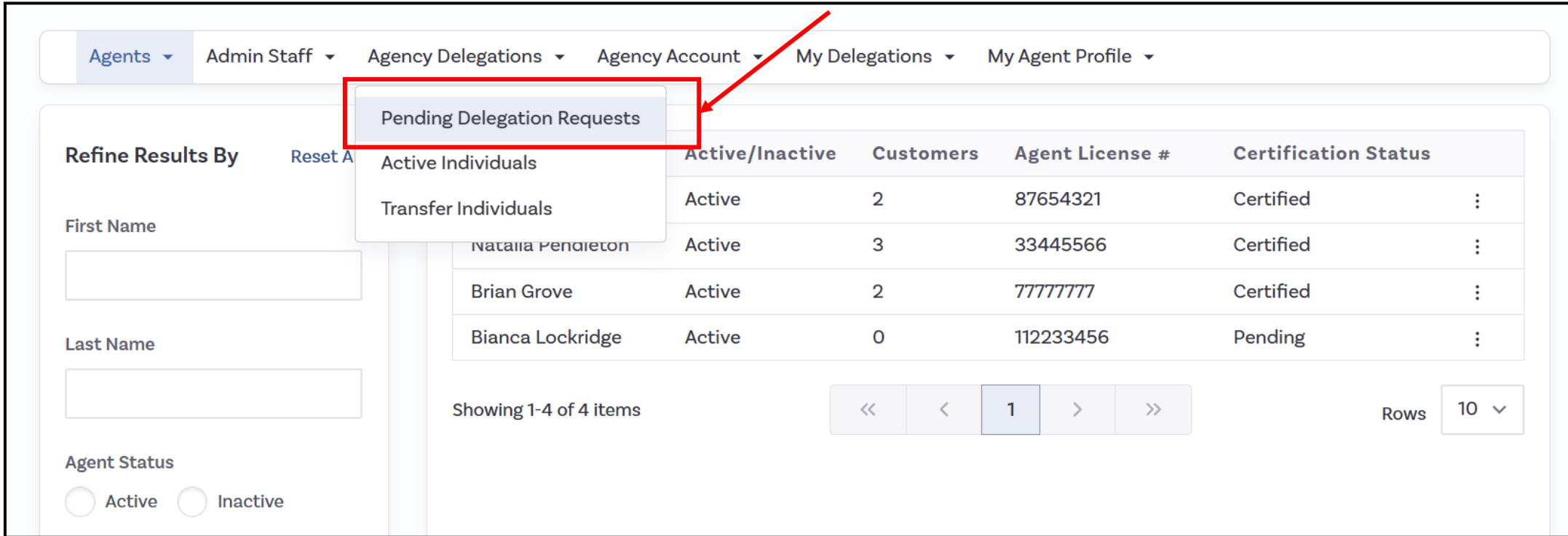


The screenshot displays the 'Get Covered Illinois' Agency Manager interface. At the top, the logo and navigation links (Home, My Account) are visible. Below the header, a navigation bar includes tabs for 'Agents', 'Admin Staff', 'Agency Delegations', 'Agency Account', 'My Delegations', and 'My Agent Profile'. The 'Agents' tab is selected, showing a 'Refine Results By' section on the left with input fields for 'First Name' and 'Last Name', radio buttons for 'Agent Status' (Active/Inactive), a 'Certification Status' dropdown, and a 'License Number' field with a 'Go' button. The main area displays a table of agents with 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 shows 'Showing 1-4 of 4 items' and pagination controls. A 'Rows' dropdown is 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

# 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, a navigation bar includes tabs: Agents, Admin Staff, Agency Delegations, Agency Account, My Delegations, and My Agent Profile. The 'Agency Delegations' tab is active, and its dropdown menu is open, highlighting 'Pending Delegation Requests' with a red box and a red arrow. Below the navigation bar, the 'Refine Results By' section on the left includes a 'Reset A' button, input fields for 'First Name' and 'Last Name', and 'Agent Status' radio buttons for 'Active' and 'Inactive'. The main content area shows a table with columns: Active/Inactive, Customers, Agent License #, and Certification Status. The table lists four items, with the last one, Bianca Lockridge, having a 'Pending' status. A red arrow points from the 'Pending Delegation Requests' tab to the table. At the bottom, pagination shows '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	3	33445566	Certified
Active	2	77777777	Certified
Active	0	112233456	Pending



# 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.

Agents ▾Admin Staff ▾Agency Delegations ▾Agency Account ▾My Delegations ▾My Agent Profile ▾

Refine Results ByReset All

Individual First Name

Individual Last Name

Agent First Name

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

Showing 1-1 of 1 items

<<<

<

1

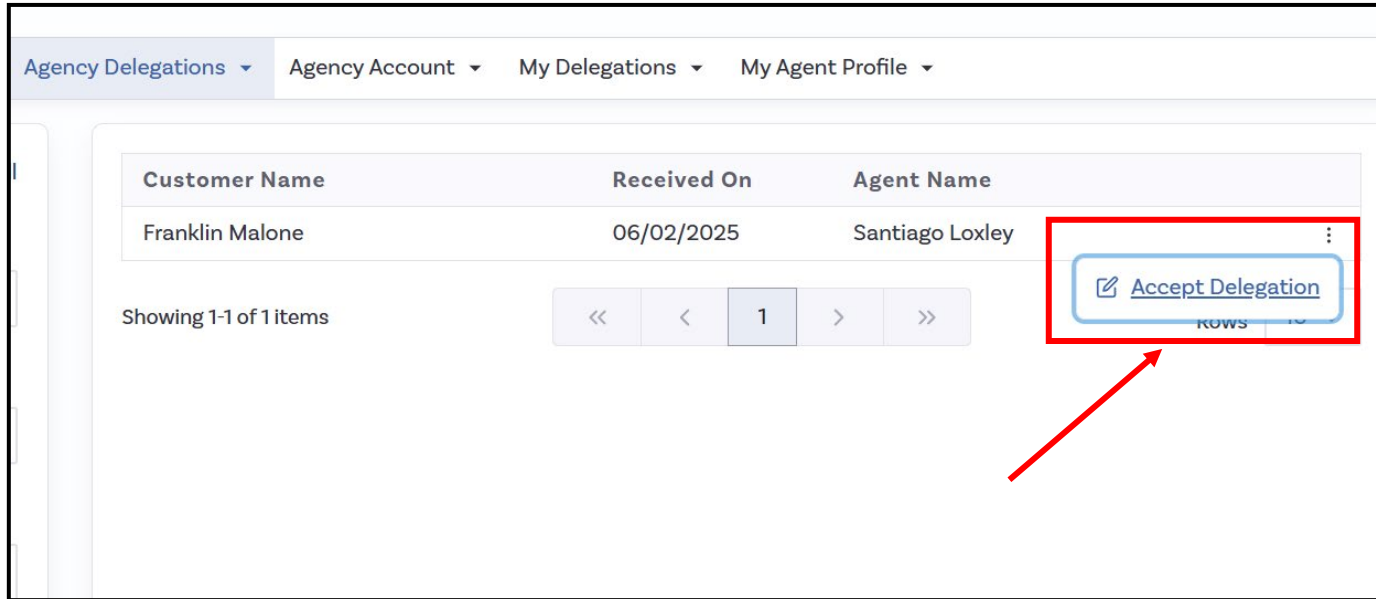
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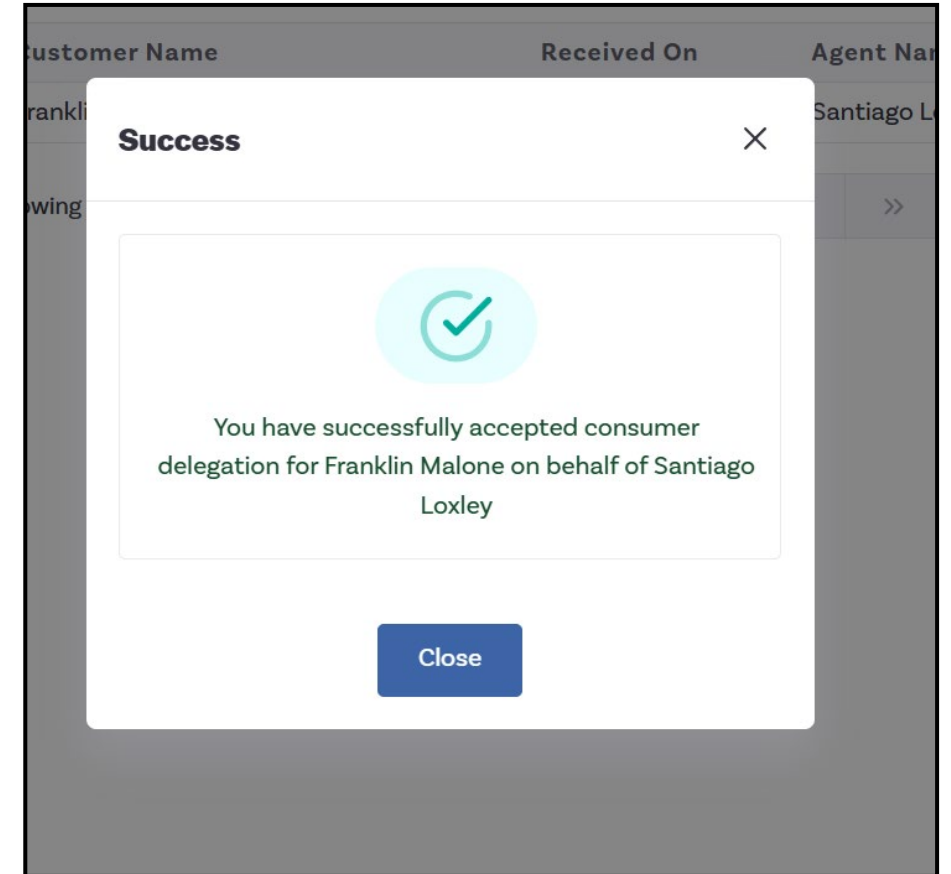
Rows10 ▾

# 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 shows 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, showing 'Pending Delegation Requests', 'Active Individuals' (highlighted with a red box), and 'Transfer Individuals'. A red arrow points to the 'Active Individuals' tab. Below the navigation tabs, there is a 'Refine Results By' section with a 'Reset' button. It includes input fields for 'First Name' and 'Last Name', and radio buttons for 'Agent Status' (Active and Inactive). There is also a 'Certification Status' dropdown menu and a 'License Number' input field. A 'Go' button is at the bottom of this section. The main content area displays a table of active individuals. The table has columns: Active/Inactive, Customers, Agent License #, and Certification Status. The data rows are:

Active/Inactive	Customers	Agent License #	Certification Status
Active	2	87654321	Certified
Active	6	33445566	Certified
Active	1	77777777	Certified
Active	0	11223344	Pending

Below the table, it says 'Showing 1-4 of 4 items' and 'Rows 10'. A red box highlights the 'Active Individuals' tab, and a red arrow points to it from the top right.

# 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

See all

Showing 1-9 of 9 items

Previous 1 Next

Select all on this page Transfer Selected Export Book Of Business

**Miles Rigal**

Household Case ID IL100004256

Agent Natalia Pendleton

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

**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

Clear all Search

See less

# 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.

This screenshot shows the search results for the Agency Manager. At the top, there are search filters for Issuer (a dropdown menu), Agent First Name (containing 'Santiago'), and Agent Last Name (empty). Below these is the Agent NPN field. A 'Clear all' button and a 'Search' button are on the right. A 'See less' link is also present. The results section shows 'Showing 1-2 of 2 Items' with pagination controls (Previous, 1, Next). A table lists two customers: Franklin Malone and Boris Crofton. Each entry includes the Household Case ID, Agent Name (Santiago Loxley), Application Year, Application Status (Start New Application), Eligibility Status, and a link to 'Household not enrolled in a plan'. At the bottom of each entry are links for 'Household Composition & Eligibility', 'Applicant Verifications', and 'More Actions'.

Customer Name	Household Case ID	Agent	Application Year	Application Status	Eligibility Status	Household Status
Franklin Malone	IL100004324	Santiago Loxley	-	Start New Application	-	Household not enrolled in a plan
Boris Crofton	IL100004323	-	-	Start New Application	-	Household not enrolled in a plan

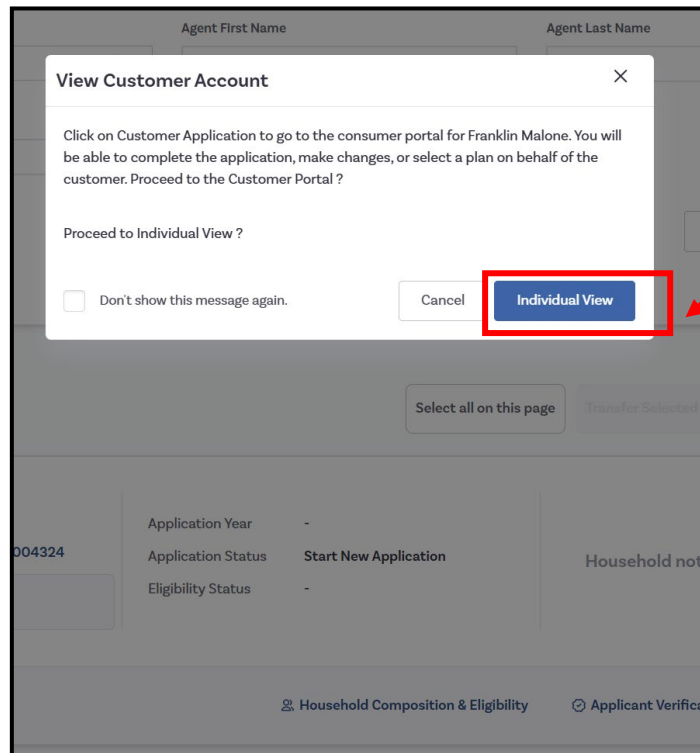
**Step 5:** The Agency Manager navigates to “View Household Details” to see this customer's account.

This screenshot shows the 'View Household Details' page for Franklin Malone. A red arrow points to the 'View Household Details' button in the 'More Actions' dropdown menu. The page displays the following information: Household Case ID (IL100004324), Agent (Santiago Loxley), Application Year (-), Application Status (Start New Application), Eligibility Status (-), and a status message 'Household not enrolled in a plan'. Below this is a 'Select' checkbox and links for 'Household Composition & Eligibility', 'Applicant Verifications', and 'More Actions'. The 'More Actions' dropdown menu is open, showing options: View Details, View Household Details (highlighted), Transfer Client, Resend Activation Email, Mark As Inactive, and View Enrollment Details.

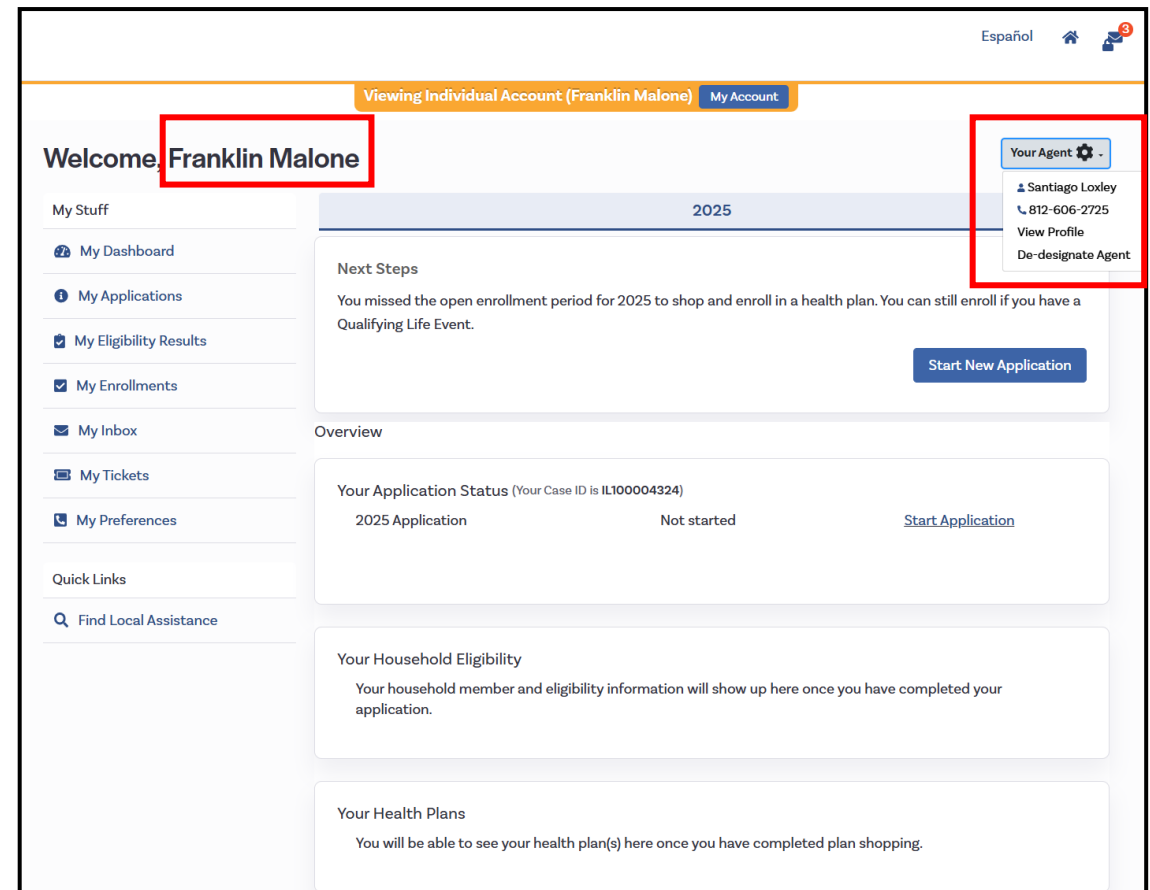
Customer Name	Household Case ID	Agent	Application Year	Application Status	Eligibility Status	Household Status
Franklin Malone	IL100004324	Santiago Loxley	-	Start New Application	-	Household not enrolled in a plan
Boris Crofton	IL100004323	-	-	Start New Application	-	Household not enrolled in a plan

# 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.



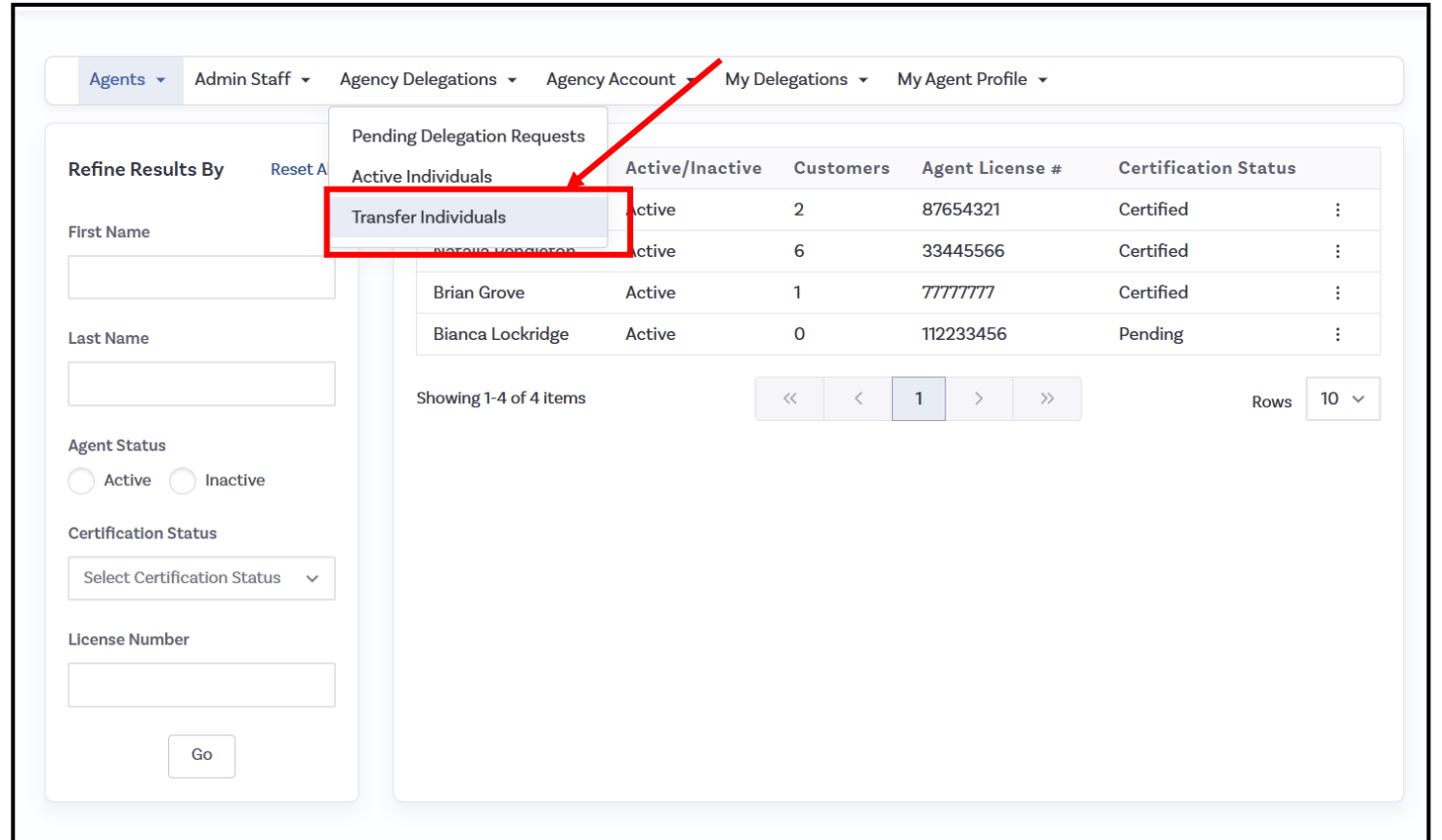
**Step 7:** The Agency Manager can act on behalf of customer Franklin, who is designated to agent Santiago.



# 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 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 dropdown menu is open, showing '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 bar, there is a 'Refine Results By' section with a 'Reset' button. This section includes input fields for 'First Name' and 'Last Name', and radio buttons for 'Agent Status' (Active and Inactive). There is also a 'Certification Status' dropdown menu and a 'License Number' input field. A 'Go' button is located at the bottom of this section. To the right of the 'Refine Results By' section is a table with the following columns: Active/Inactive, Customers, Agent License #, and Certification Status. The table contains four rows of data. The first row is partially obscured by the dropdown menu. The second row shows 'Brian Grove' as 'Active' with 1 customer and license # 77777777, with a 'Certified' status. The third row shows 'Bianca Lockridge' as 'Active' with 0 customers and license # 1122334455, with a 'Pending' status. The table is paginated, 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' page with search filters: First Name, Last Name, Application Year (dropdown), Clear all, and Search. A red box highlights the 'See all' link with a red arrow pointing to it. Below the filters, it says 'Showing 1-9 of 9 items' and has pagination (Previous, 1, Next) and action buttons (Select all on this page, Transfer Selected, Export Book Of Business). A client card for Miles Rigal is shown with details: Household Case ID IL100004256, Agent Natalia Pendleton, Application Year 2025 (2 members), Application Status Report a Change, Eligibility Status Conditional, and a Binder Payment Due notice. There are also tabs for Health Plan (Molina) and Dental Plan (Dominion).

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

The screenshot shows the 'Clients' page with 'Franklin' entered in the First Name field, which is highlighted with a red box. The Search button at the bottom right is also highlighted with a red box and a red arrow pointing to it. Other search filters like 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, and Agent NPN are visible.



# 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.

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 Santiago Loxley  
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

- View Details
- View Household Details
- Transfer Client**
- Resend Activation Email
- Mark As Inactive
- View Enrollment Details

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

Transfer 1 client

You have selected the following 1 client for transfer to a new agent:

- Franklin Malone

Cancel Next

Application Year -  
Application Status Start New Application  
Eligibility Status -

Household Composition & Eligibility Applicant Verifications

# 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

Last name

Site

Natalia

Select One

Email address

Certification number

Agent NPN

Clear all

Search

Select an agent and click Next

Select	Agent name	Status	Email address	Site
<div><div></div>To see a list of Agents, please enter information in the search box(es) above.</div>				

Back

Next

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

Transfer 1 client

Search for an agent to transfer to

First name

Last name

Site

Natalia

Select One

Email address

Certification number

Agent NPN

Clear all

Search

Select an agent and click Next

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

Previous

1

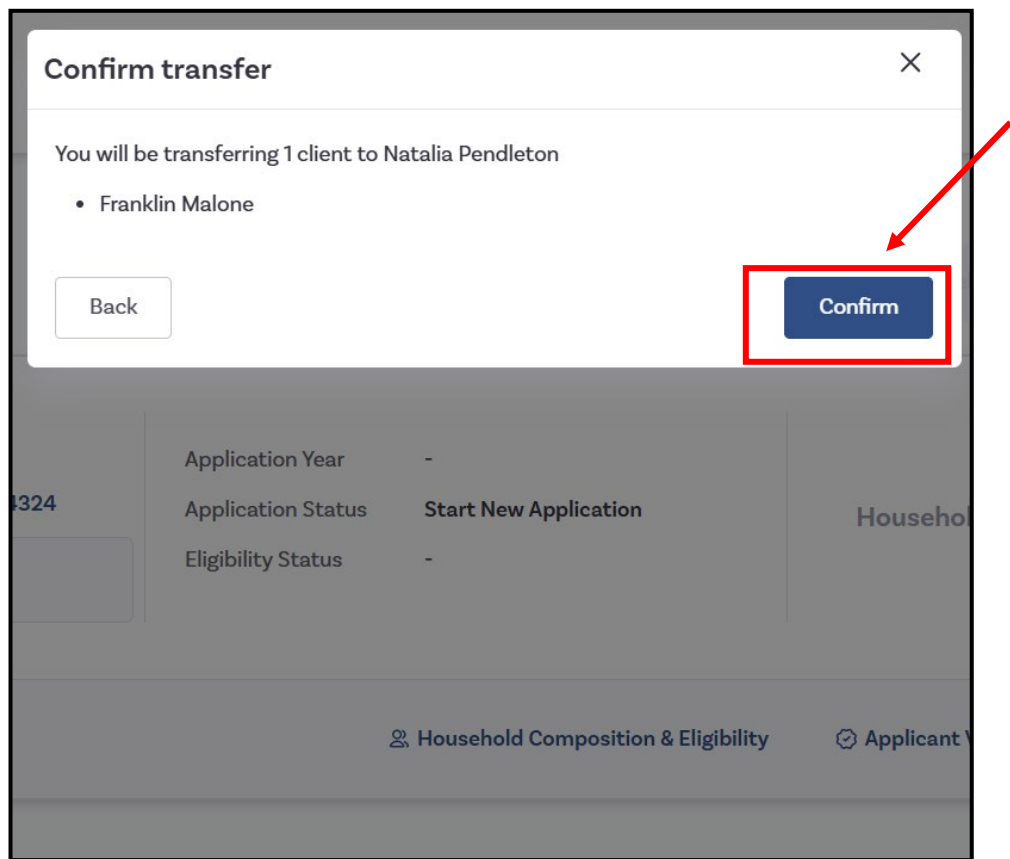
Next

Back

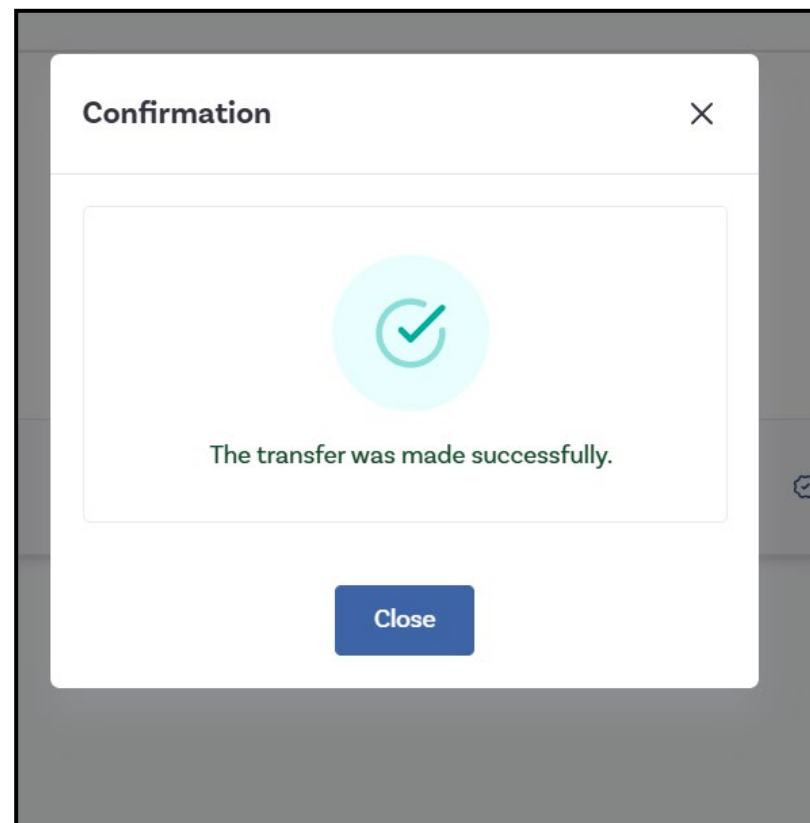
Next

# 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

<b>Franklin Malone</b>	Application Year -	Household not enrolled in a plan >
Household Case ID IL100004324	Application Status Start New Application	
Agent Natalia Pendleton NPN -	Eligibility Status -	

☐ Select

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

Previous 1 Next

# Office Hour: Your Questions Answered!

Question	Answer
Will any CMS training and certification roll over to Get Covered Illinois?	No. Get Covered Illinois will have their own education course that brokers will need to complete to be certified to maintain your Illinois customers.
Will I have access to the client's prior years' 1095 Forms?	All documents from 2025 will be able to be viewed in the HealthCare.gov platform. They <b>will not</b> be transferred to Get Covered Illinois.
Will customers be able to stay with their same plans or do they need to be rewritten?	<p>In general, current HealthCare.gov enrollees with 2025 coverage will be migrated to the Get Covered Illinois system prior to Open Enrollment. Get Covered Illinois will renew the customers for 2026 into the same or most comparable plan available.</p> <p><b>NOTE:</b> If customers make a change to their 2025 HealthCare.gov coverage late in the year or during OE, customers may need to also update their 2026 Get Covered Illinois coverage.</p>
Who do we call if there are issues with applications?	<p>The Get Covered Illinois Customer Assistance Center will be available Monday through Friday, from 8:00 AM to 8:00 PM. Customers can call 1-866-311-1119 (TTY – 711).</p> <p>Starting in October 2025, the Get Covered Illinois Assister &amp; Broker Support Team line will be available to support.</p>

# Office Hour: Your Questions Answered!

Question	Answer
Will Illinois maintain the same enrollment deadlines and policies as HealthCare.gov?	<p>Customers must enroll by:</p> <ul style="list-style-type: none"><li>• 12/15/25 for coverage effective 1/1/26, <b>or</b></li><li>• 1/15/26 for coverage effective 2/1/26</li></ul> <p>Get Covered Illinois will make state-level decisions for enrollment deadlines and grace periods. These may vary from the HealthCare.gov platform. Always refer to Get Covered Illinois resources to confirm state-specific requirements.</p>
How will the change to Get Covered Illinois from HealthCare.gov affect the broker's commissions?	<p>This change <b>will not</b> impact brokers' commissions. Commissions are determined by the insurers. Get Covered Illinois will capture broker associations at any stage of the customer journey and send regular updates to insurers.</p>
When will we know which marketplace carriers will be available in our area?	<p>Draft rates are available through the Illinois Department of Insurance's (DOI's) <a href="#">website</a>. We will provide more information in the coming months.</p>

# Your Questions

# Next Get Covered Illinois Broker Webinar

Join us for our next webinar!

**Thursday, August 14, 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!