Get Covered Illinois
Broker Webinar

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

GetCoveredIllinois®
The Official Health Marketplace

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 <u>Tuesday, 7/15/25</u>.**
- Questions? Contact the Get Covered Illinois Outreach Team (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. **Do not** enter your IDOI License number.
Primary Phone Number	Provide your **primary** contact phone number in "XXX-XXX-XXXX" format. **Do not** provide a generic phone number. A cell phone number is preferred.
Email Address	Provide your **primary** email address in "johndoe@example.com" format. **Do not** 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. **Do not** enter a Social Security Number.
Agency Role	Specify your role in your agency (i.e., Agency Manager or Broker).

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Get Covered Illinois Broker Certification

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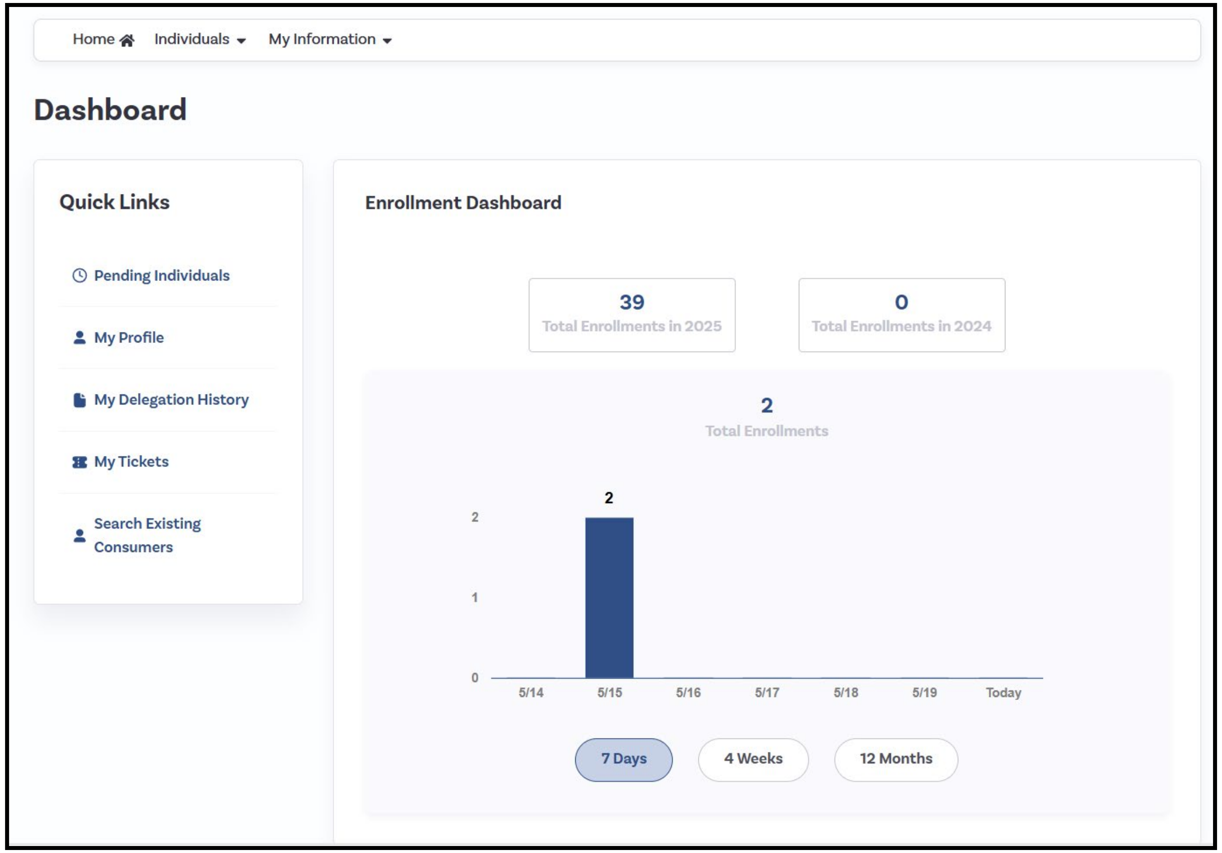
Next Steps & Resources

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

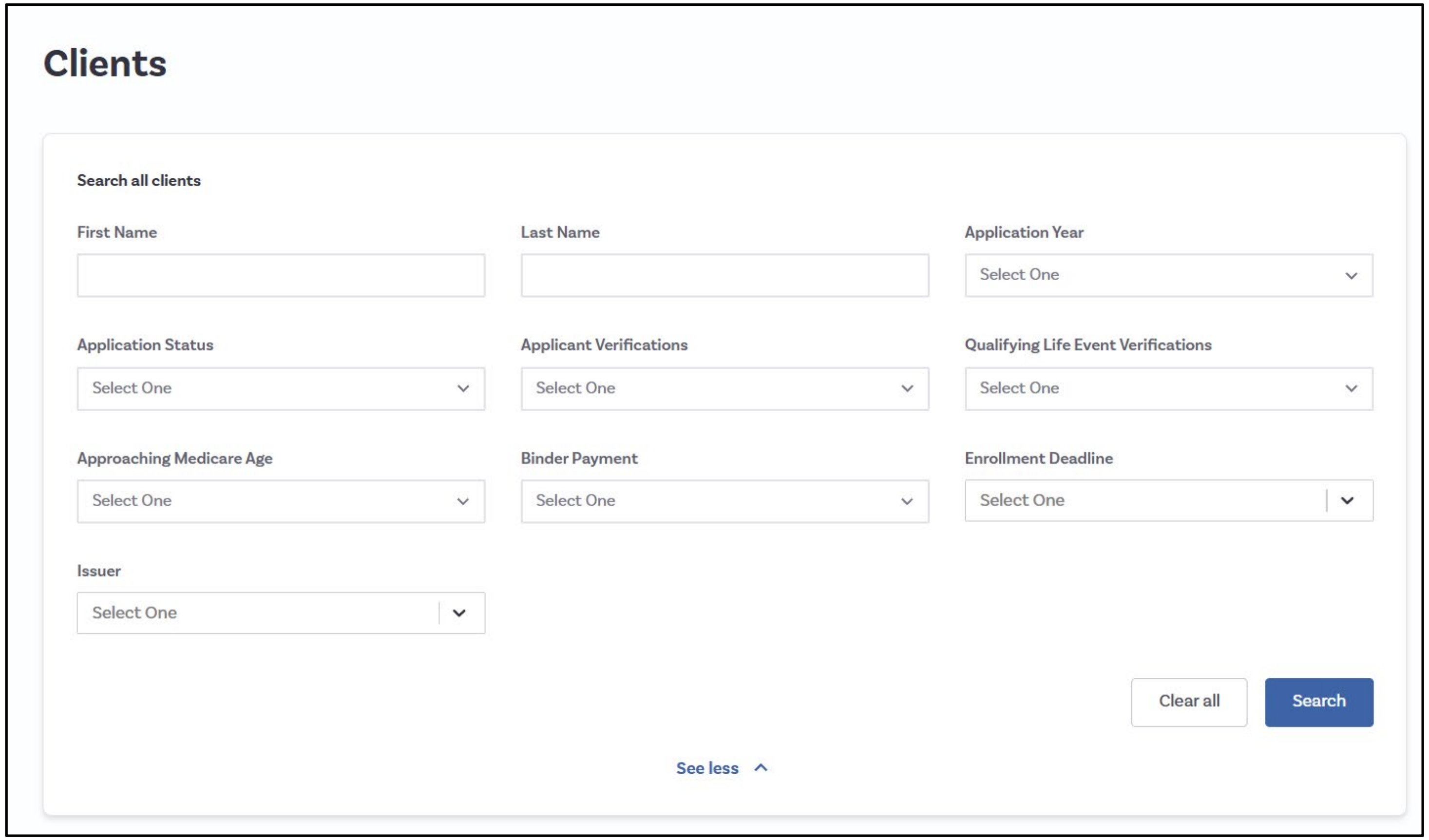
- Manage Book of Business
- Assist customer with their application and enrollment
- Upload documents to address DMIs
- Review customer notices
- Manage Customer Delegations

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

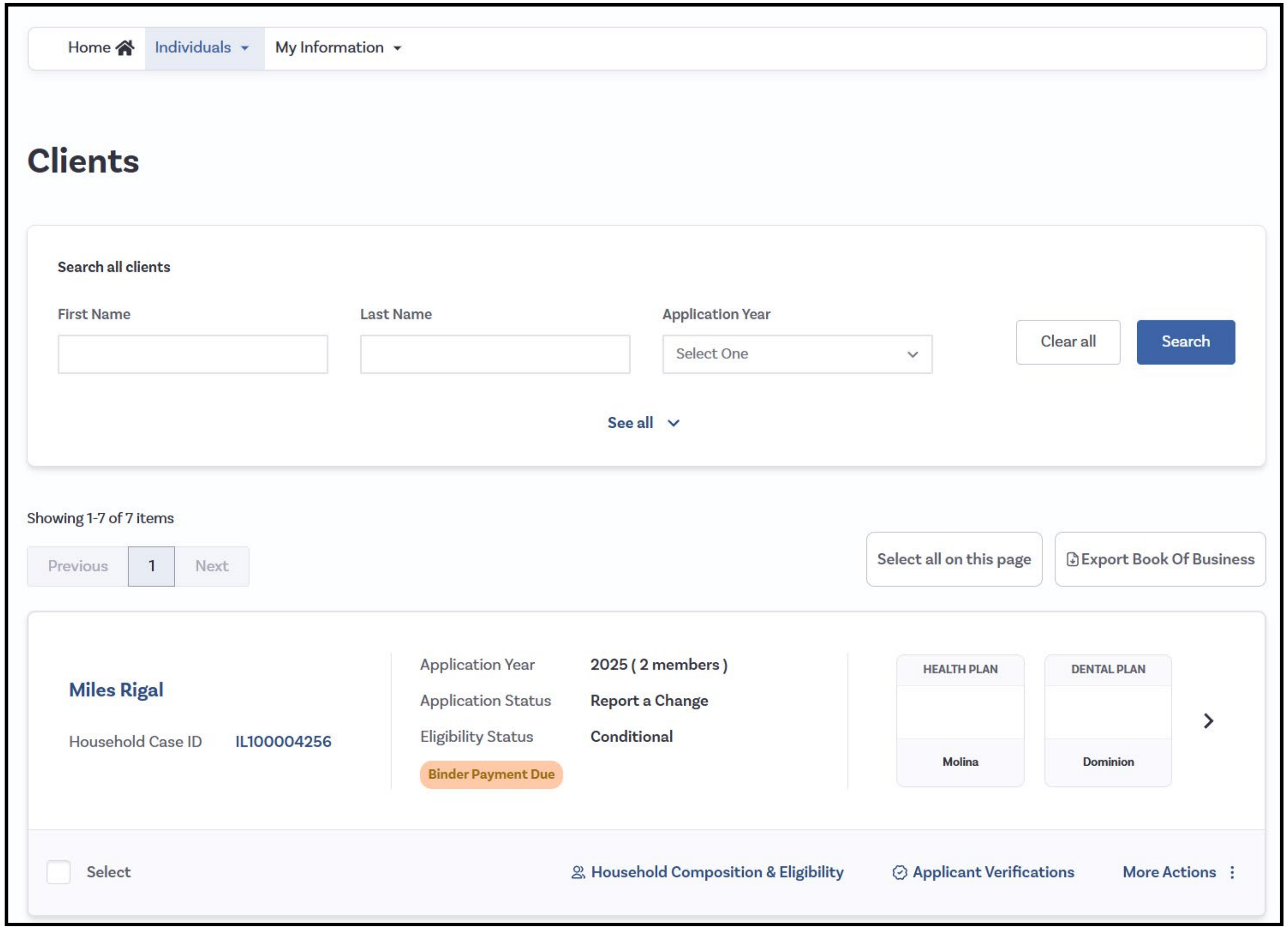


Broker Portal Basics: Managing Book of Business

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



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Customer Designations

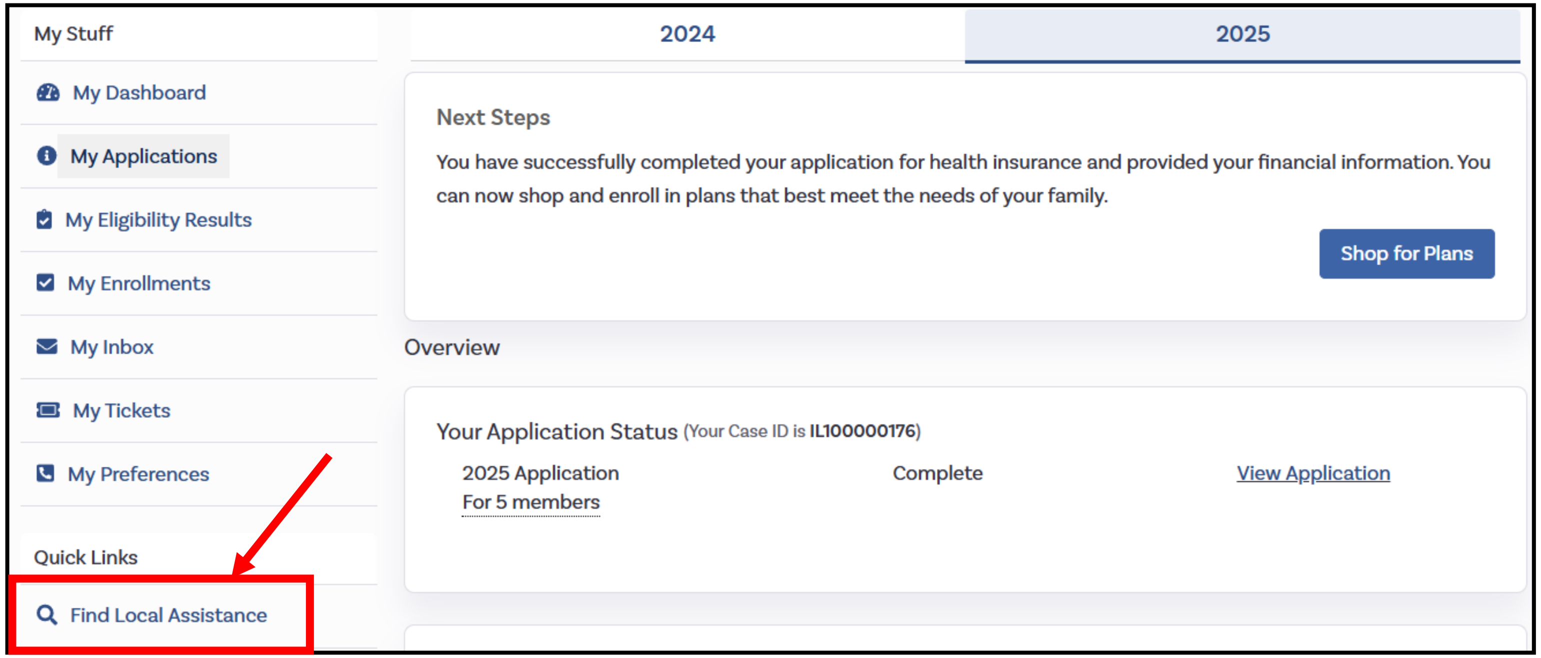
Brokers can designate consumers in two ways:

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

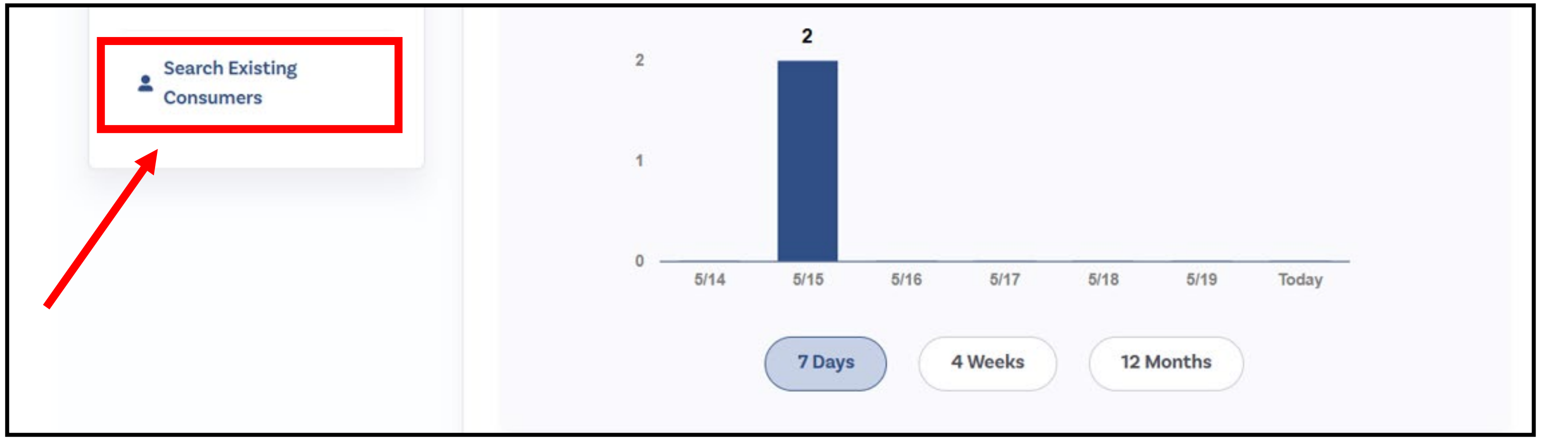
(2) Brokers can use the "Search for Existing Customer" tool to designate themselves to an existing customer or create a new account if the customer does not have one.

Brokers can designate customers at <u>any time</u> of the year and at <u>any point</u> in the customer's application or enrollment process.

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



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



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Detailed Walkthrough: Find Local Assistance Tool

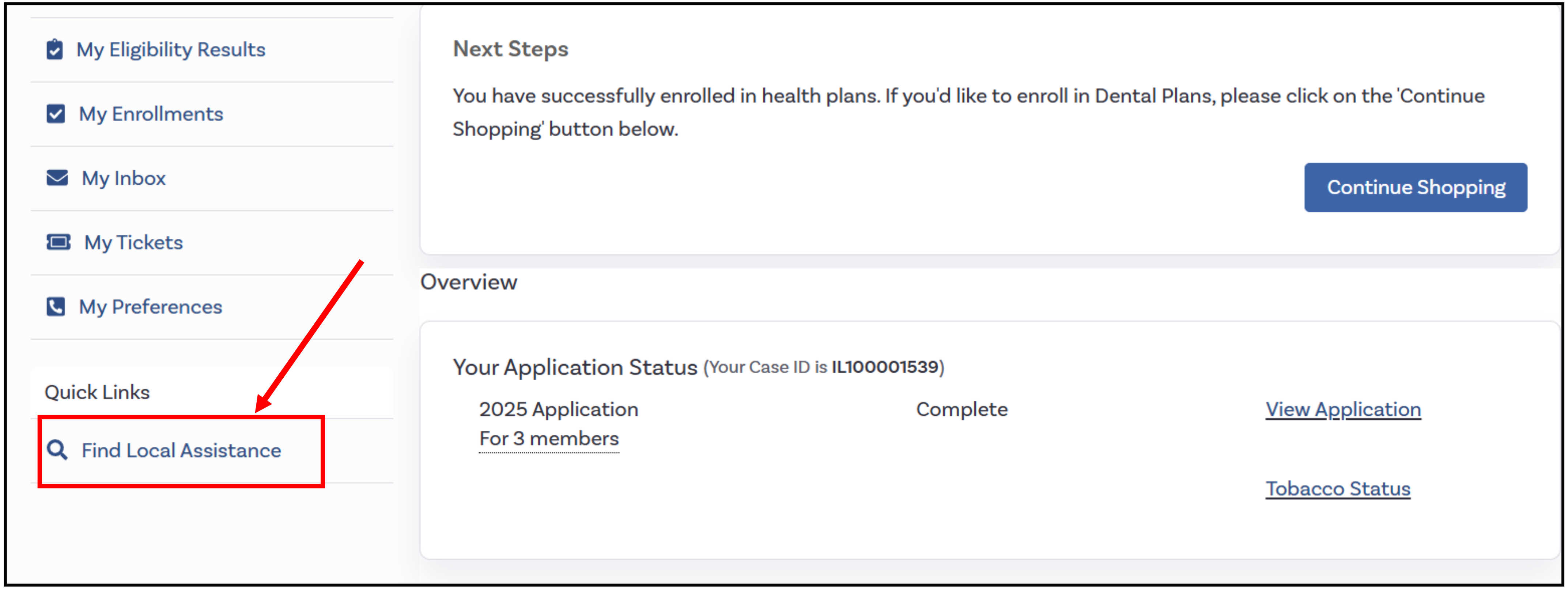
The following slides show the process that consumers can use to request a broker designation directly from their account. The high-level process is below:

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).

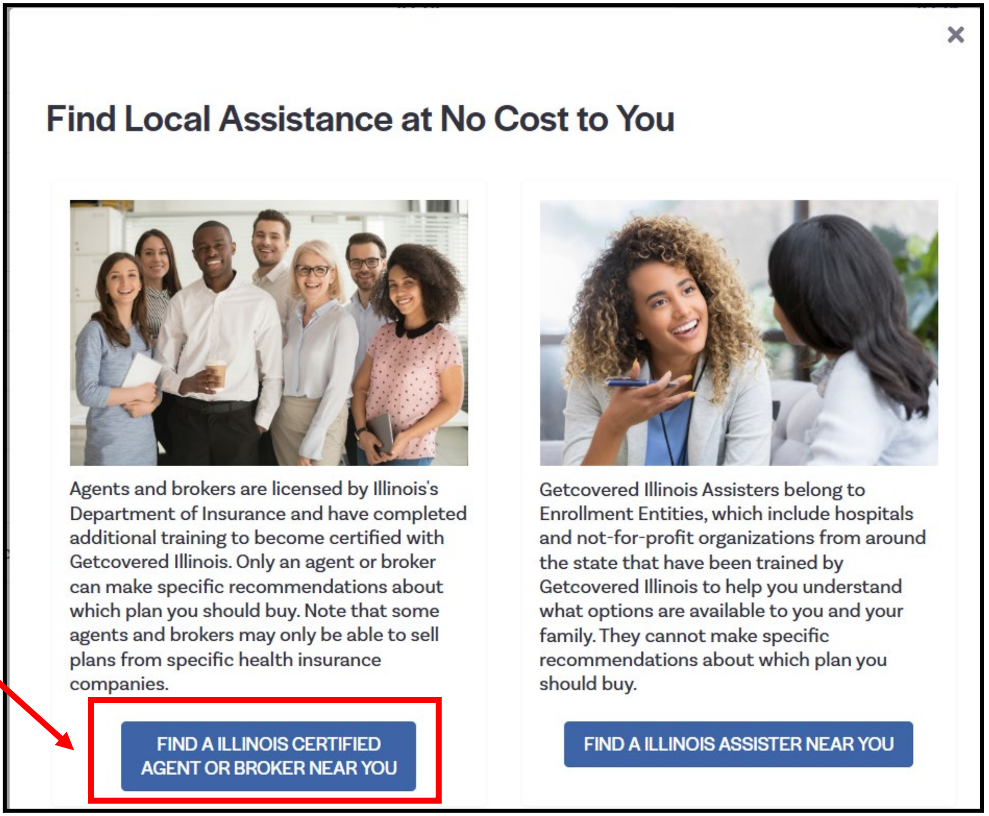
Detailed Walkthrough: Find Local Assistance Tool

Step 1: Consumers select "Find Local Assistance" from their dashboard:

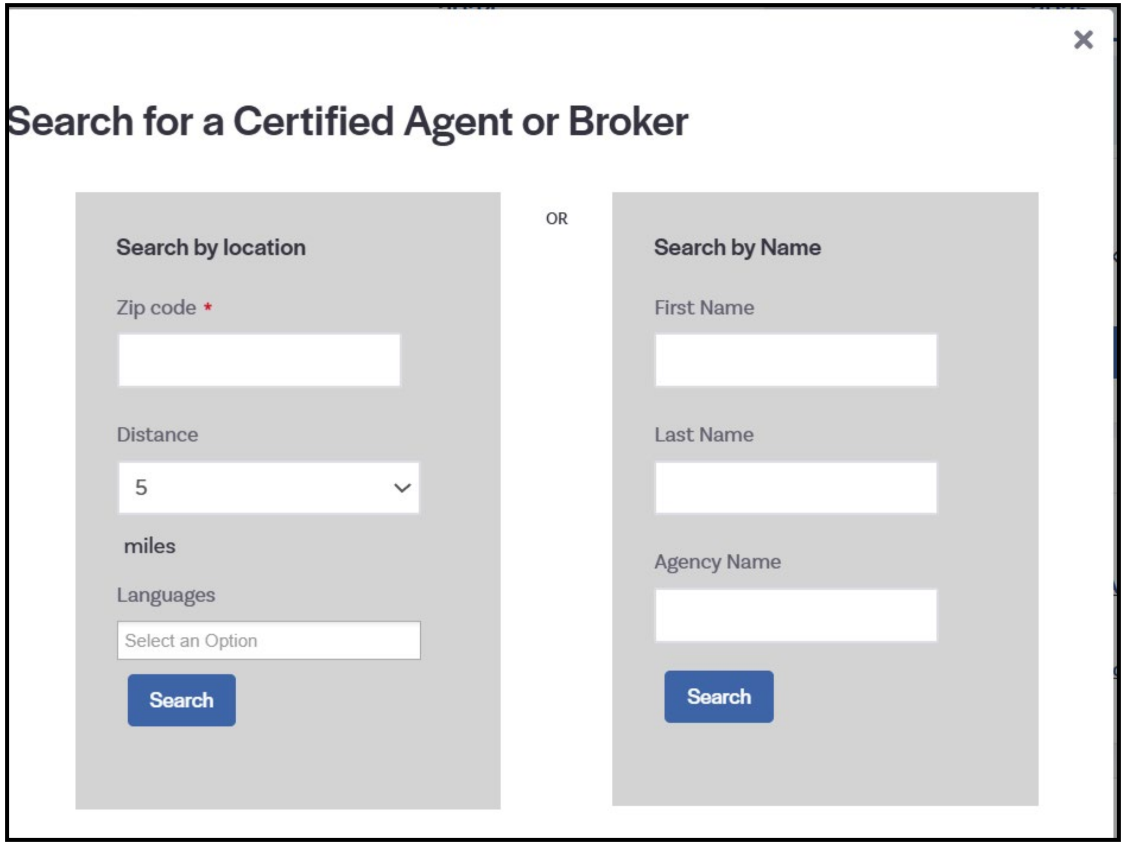


Detailed Walkthrough: Find Local Assistance Tool

Step 2: Consumers select "Find an Illinois Certified Agent or Broker Near You"*

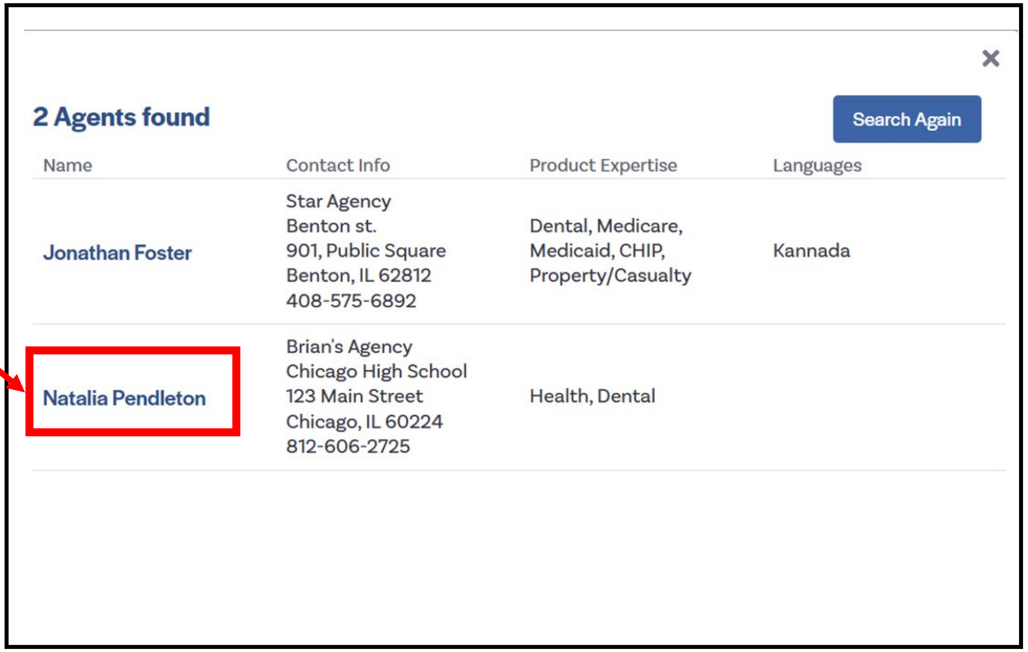


Step 3: Consumers can input a Zip Code range, or the broker's name if they know who they want to work with already.

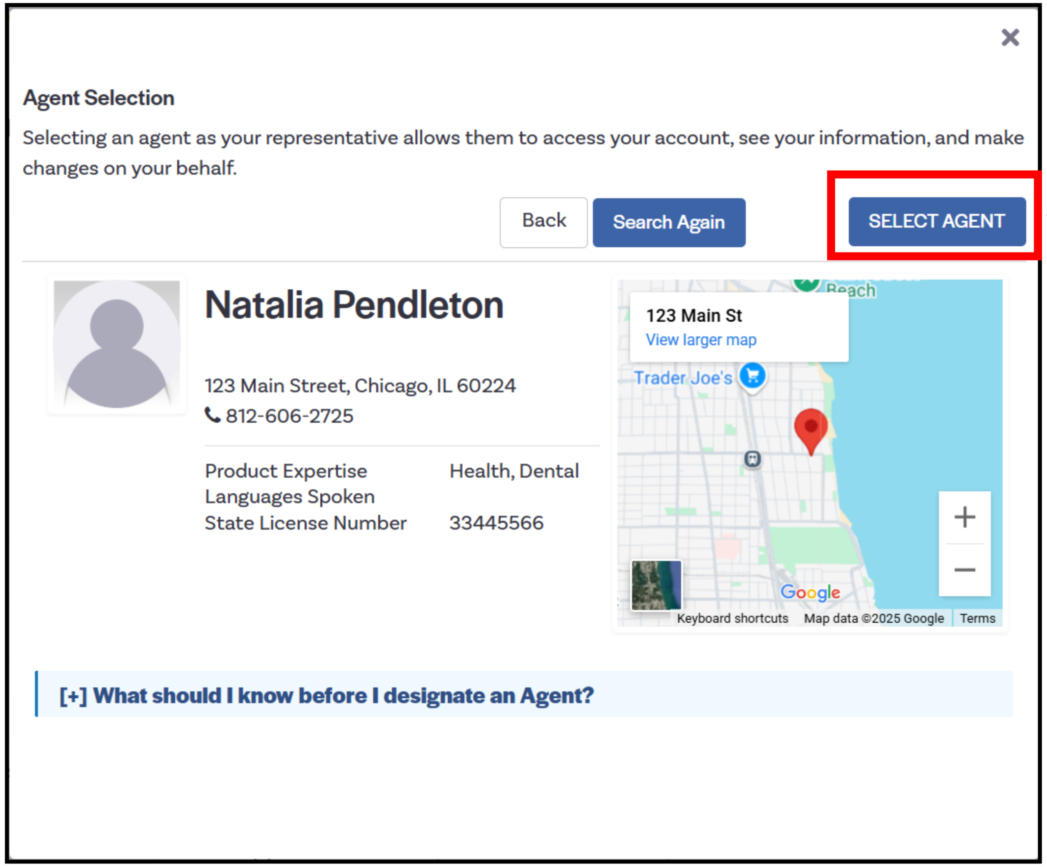


Detailed Walkthrough: Find Local Assistance Tool

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

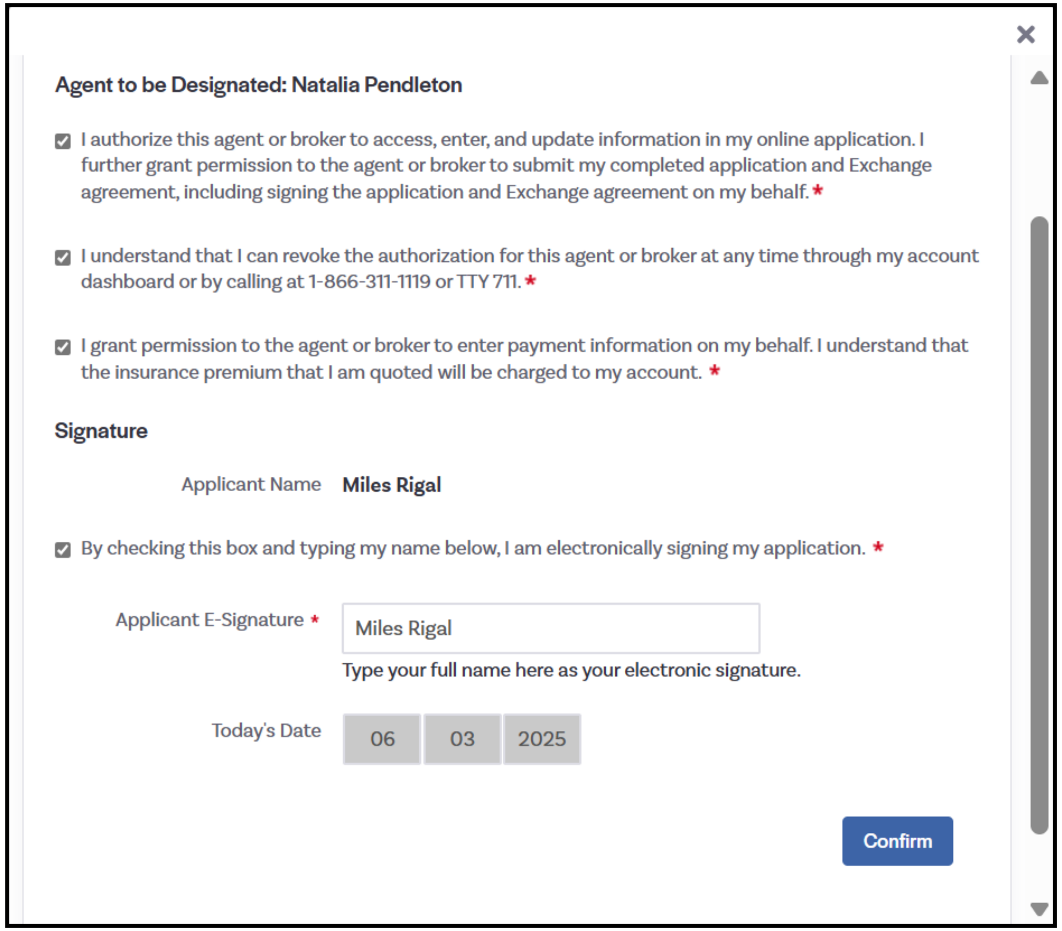


Step 5: Consumers click "Select Agent" if they would like to proceed with this broker:



Detailed Walkthrough: Find Local Assistance Tool

Step 6: Consumers review the agreement and select "Confirm".



Agent to be Designated: Natalia Pendleton

- [x] 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. *
- [x] 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. *
- [x] 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

- [x] By checking this box and typing my name below, I am electronically signing my application. *

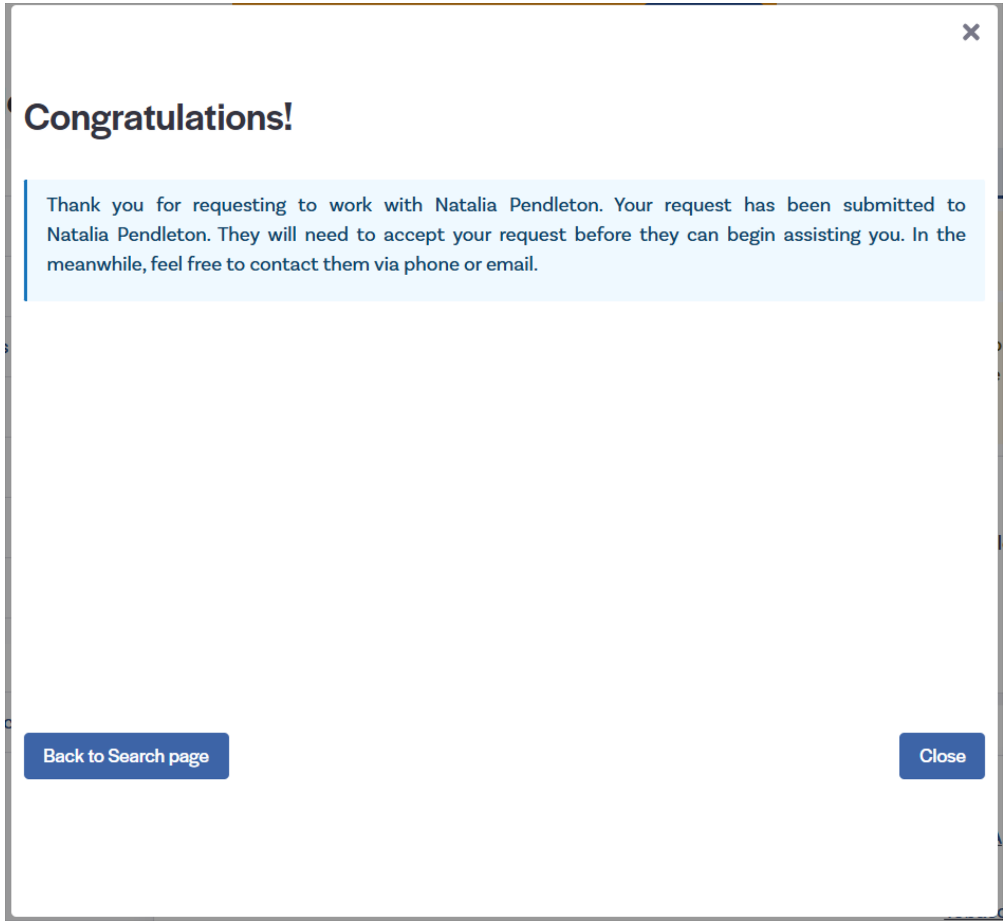
Applicant E-Signature * Miles Rigal

Type your full name here as your electronic signature.

Today's Date 06 03 2025

Confirm

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



Congratulations!

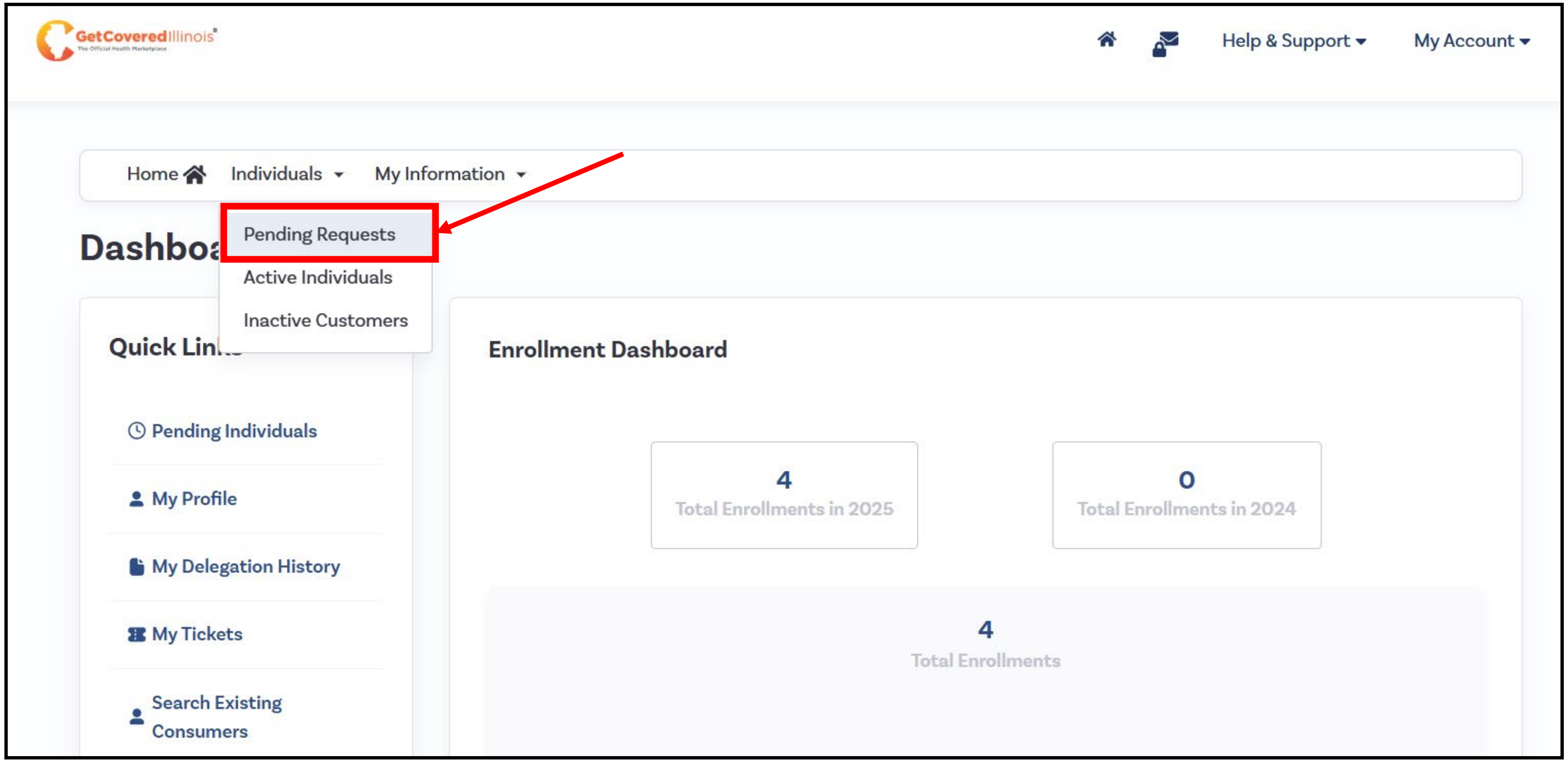
Thank you for requesting to work with Natalia Pendleton. Your request has been submitted to Natalia Pendleton. They will need to accept your request before they can begin assisting you. In the meanwhile, feel free to contact them via phone or email.

Back to Search page

Close

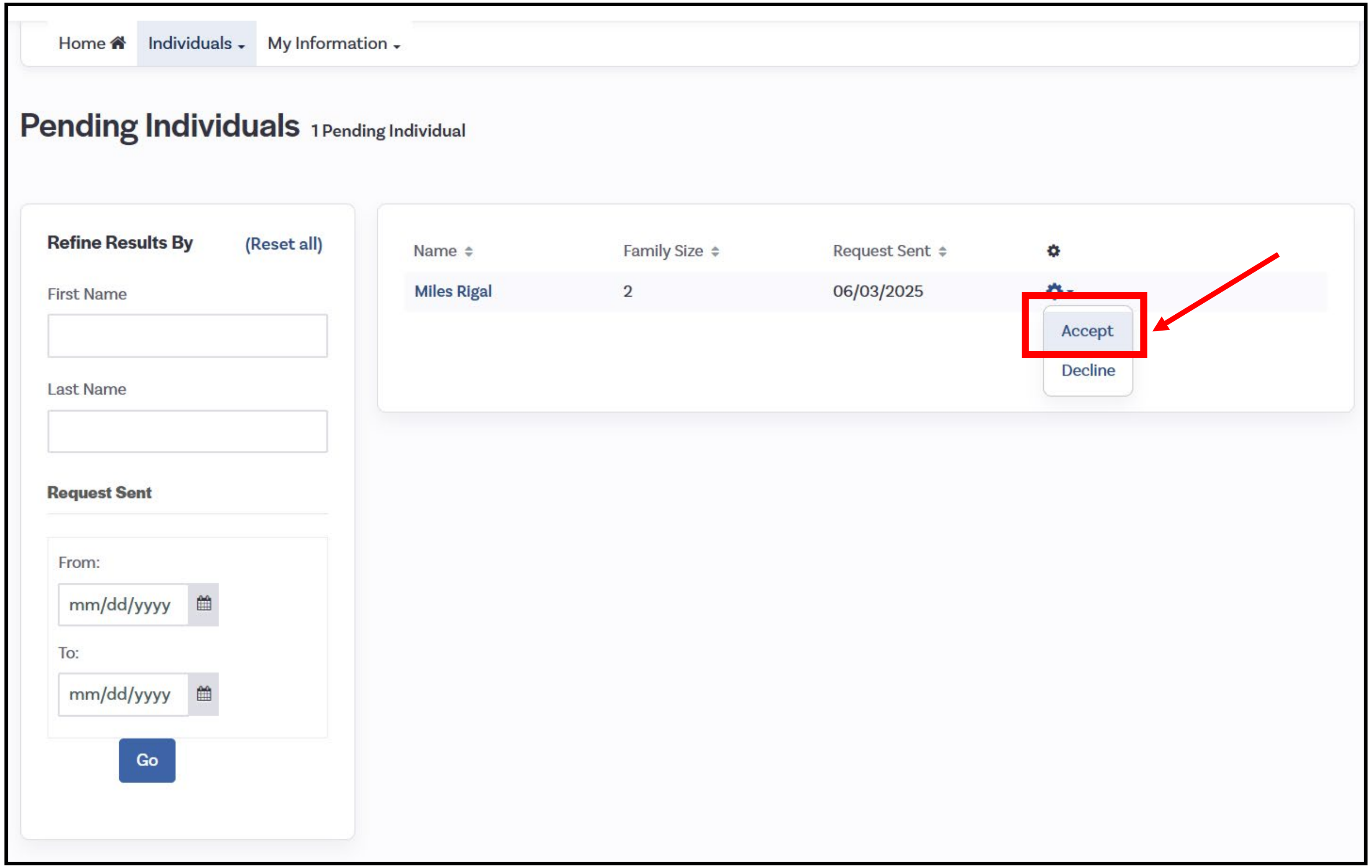
Detailed Walkthrough: Find Local Assistance Tool

Step 8: Broker navigates to "Pending" Individuals tab to view request.



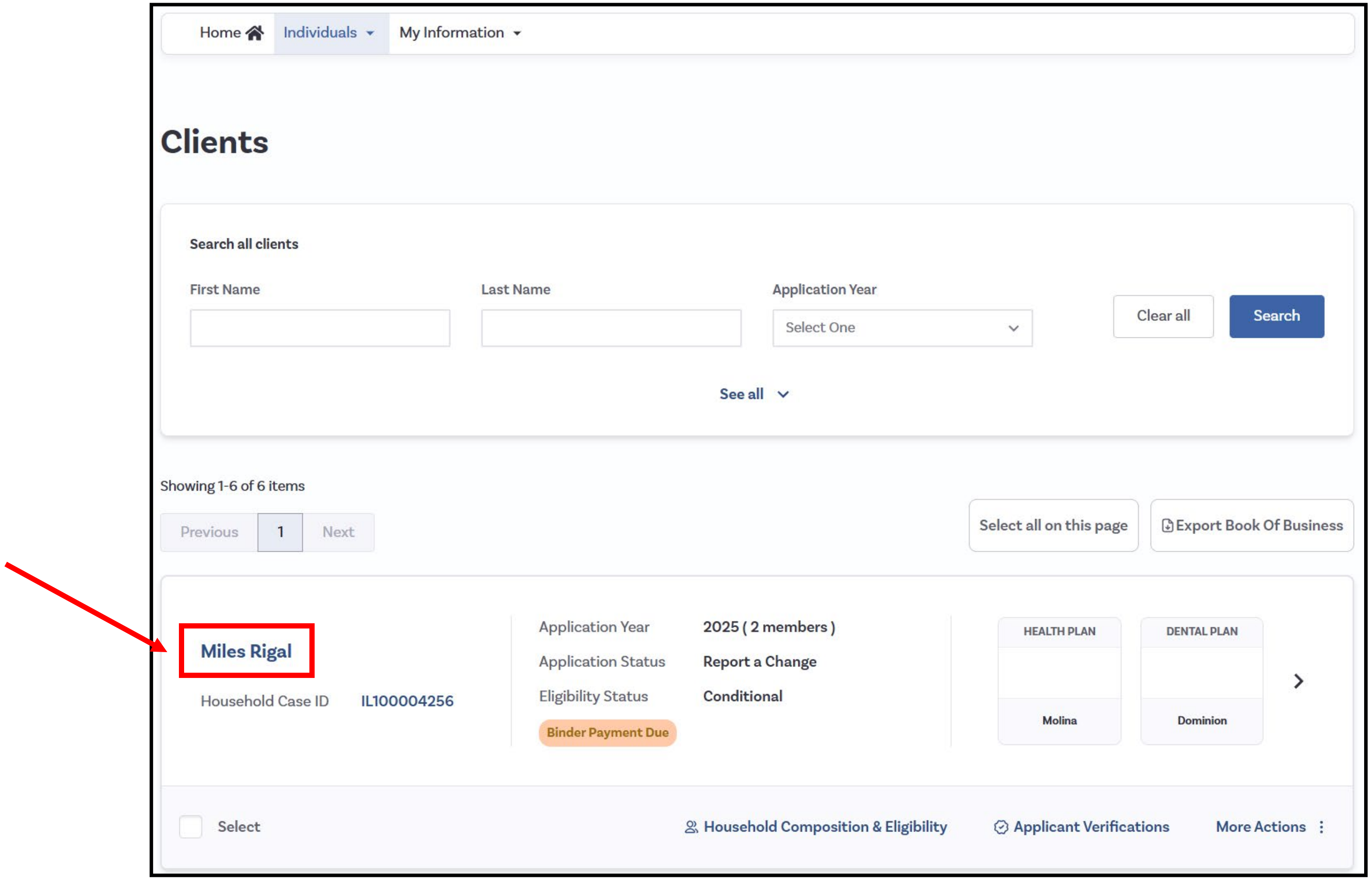
Detailed Walkthrough: Find Local Assistance Tool

Step 9: Broker selects "Accept" to designate the customer to their account.



Detailed Walkthrough: Find Local Assistance Tool

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



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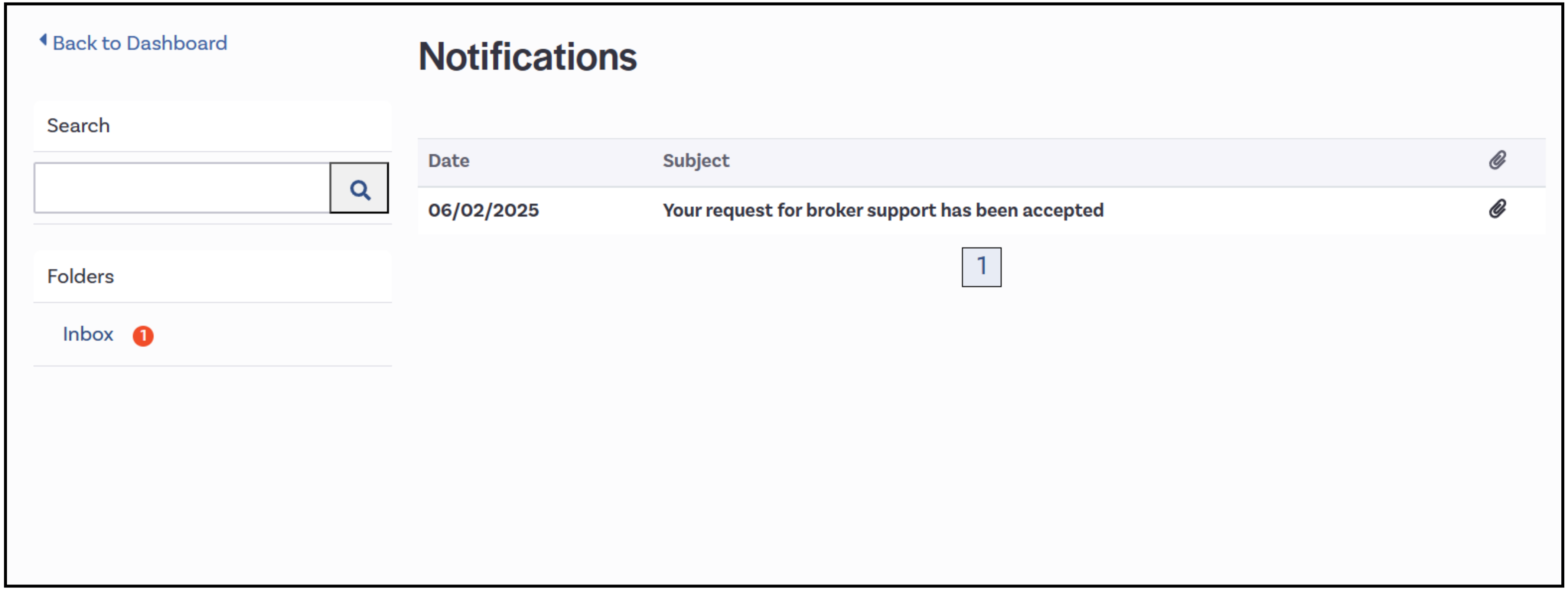
Detailed Walkthrough: Find Local Assistance Tool

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

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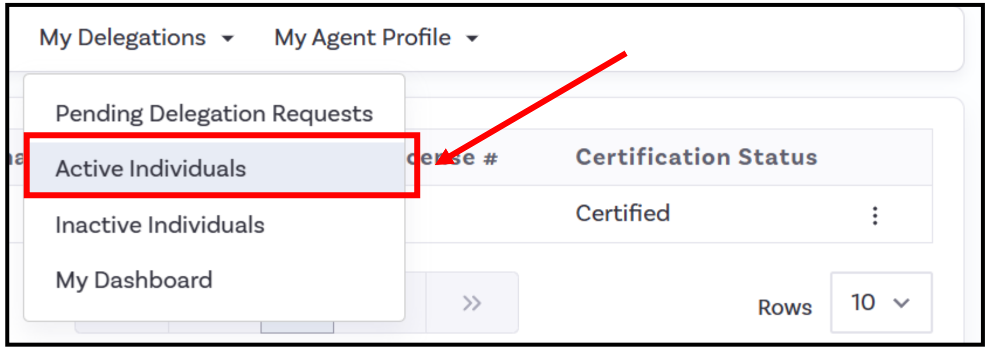
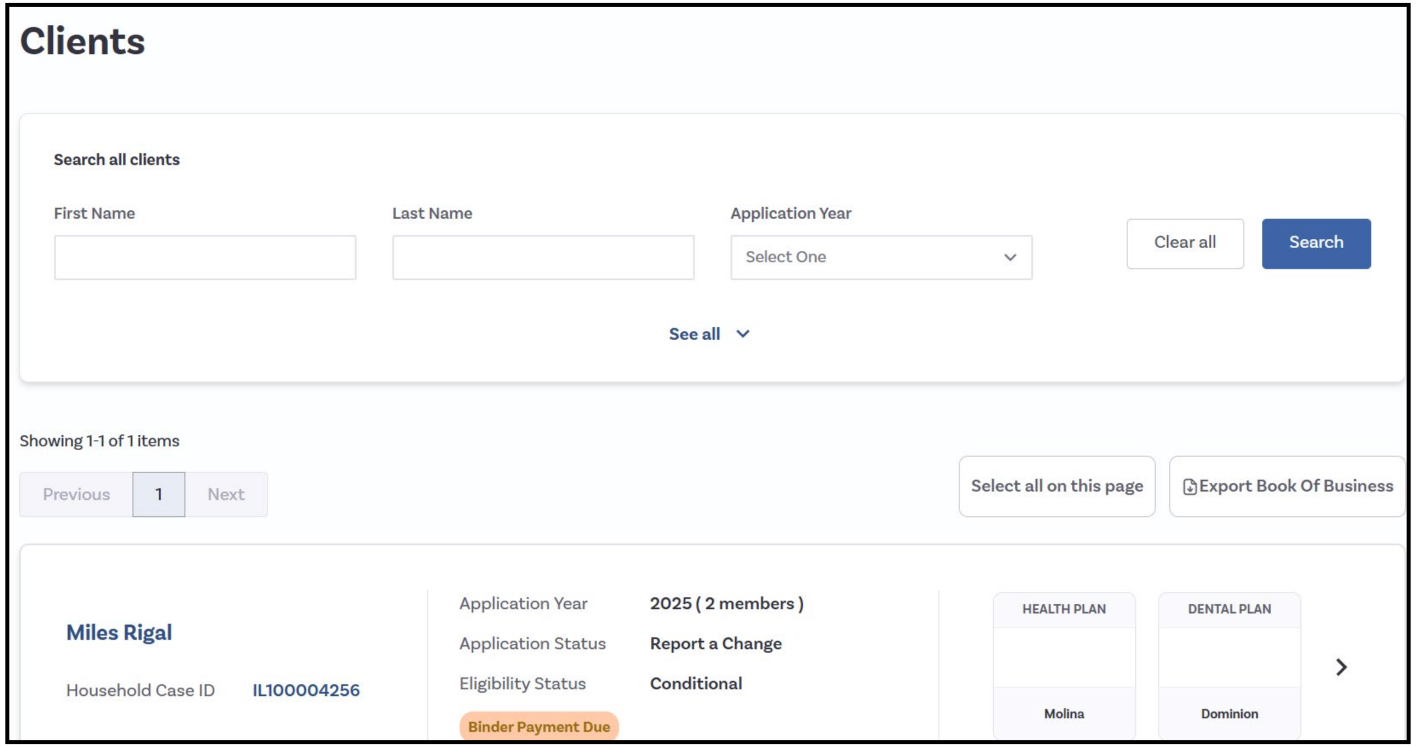
Detailed Walkthrough: View Member Account

Step 1: Broker navigates to the "Active Individuals" tab of their portal:

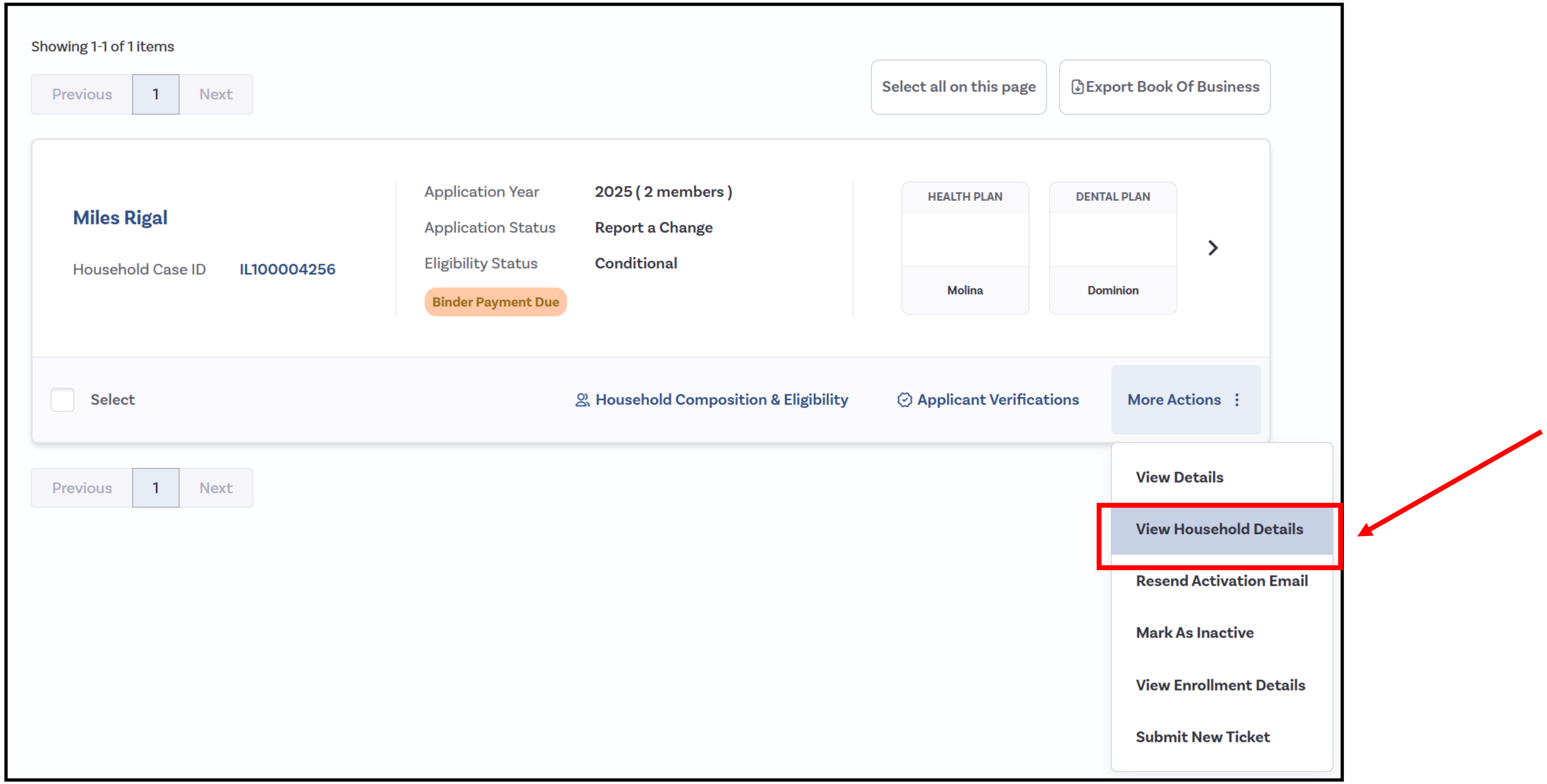


Step 2: Broker can view, search, and filter by active clients in their book of business:



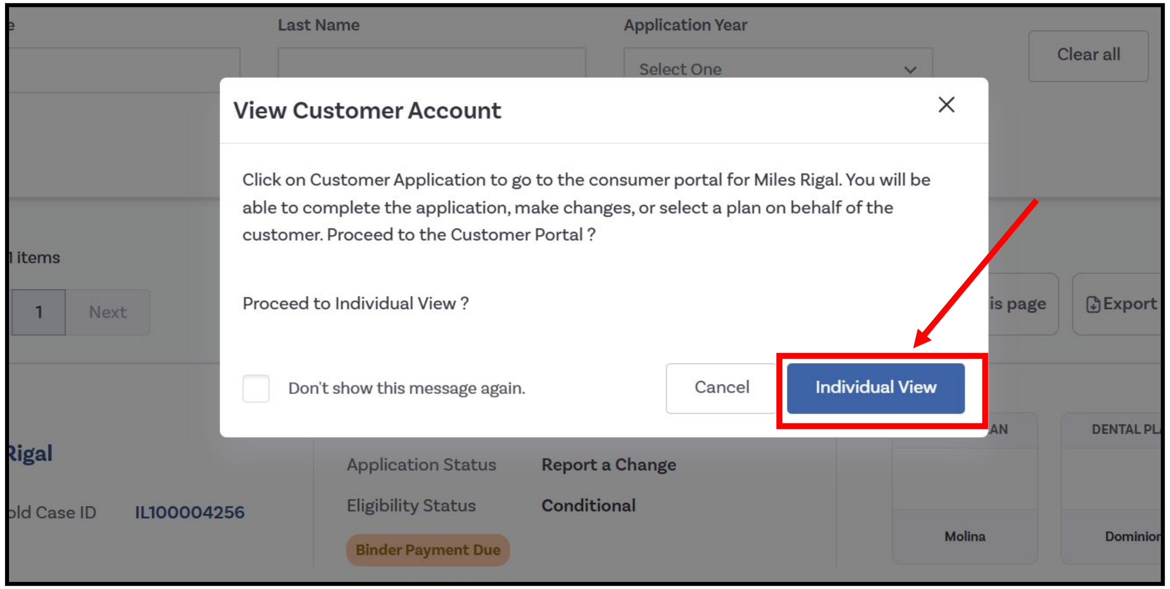
Detailed Walkthrough: View Member Account

Step 3: Broker identifies consumer and selects "View Household Details."

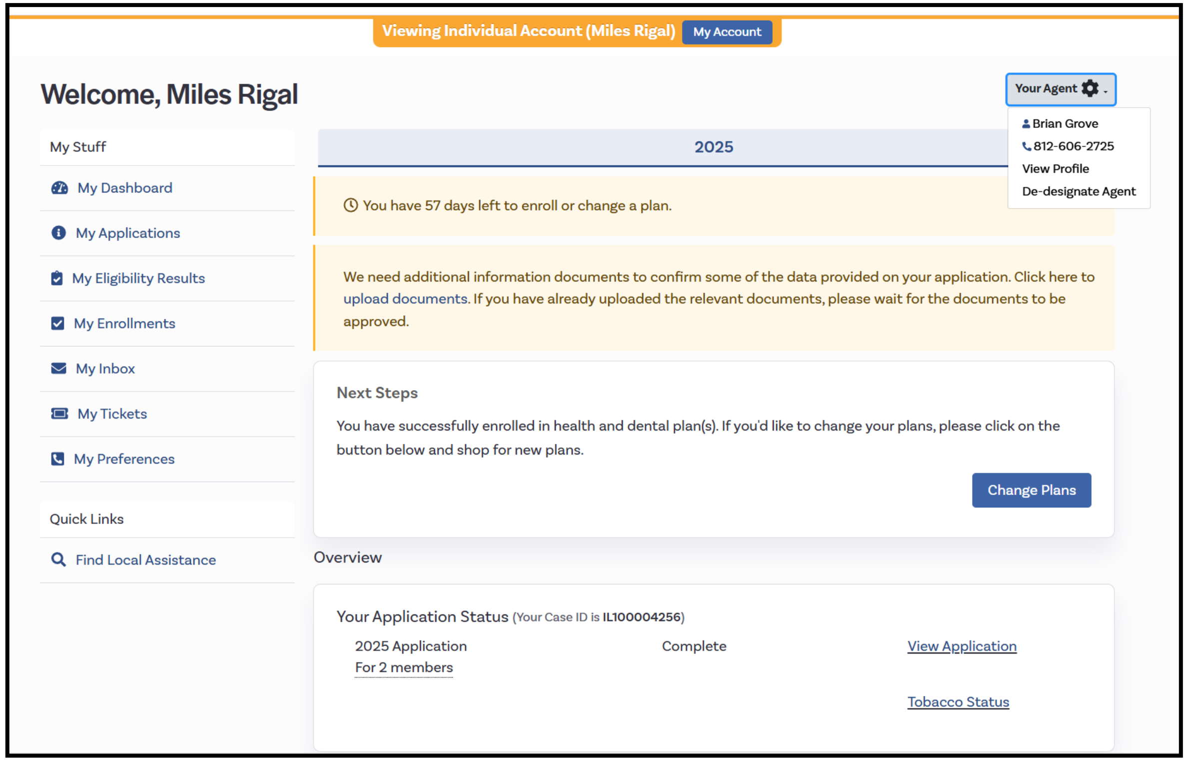


Detailed Walkthrough: View Member Account

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

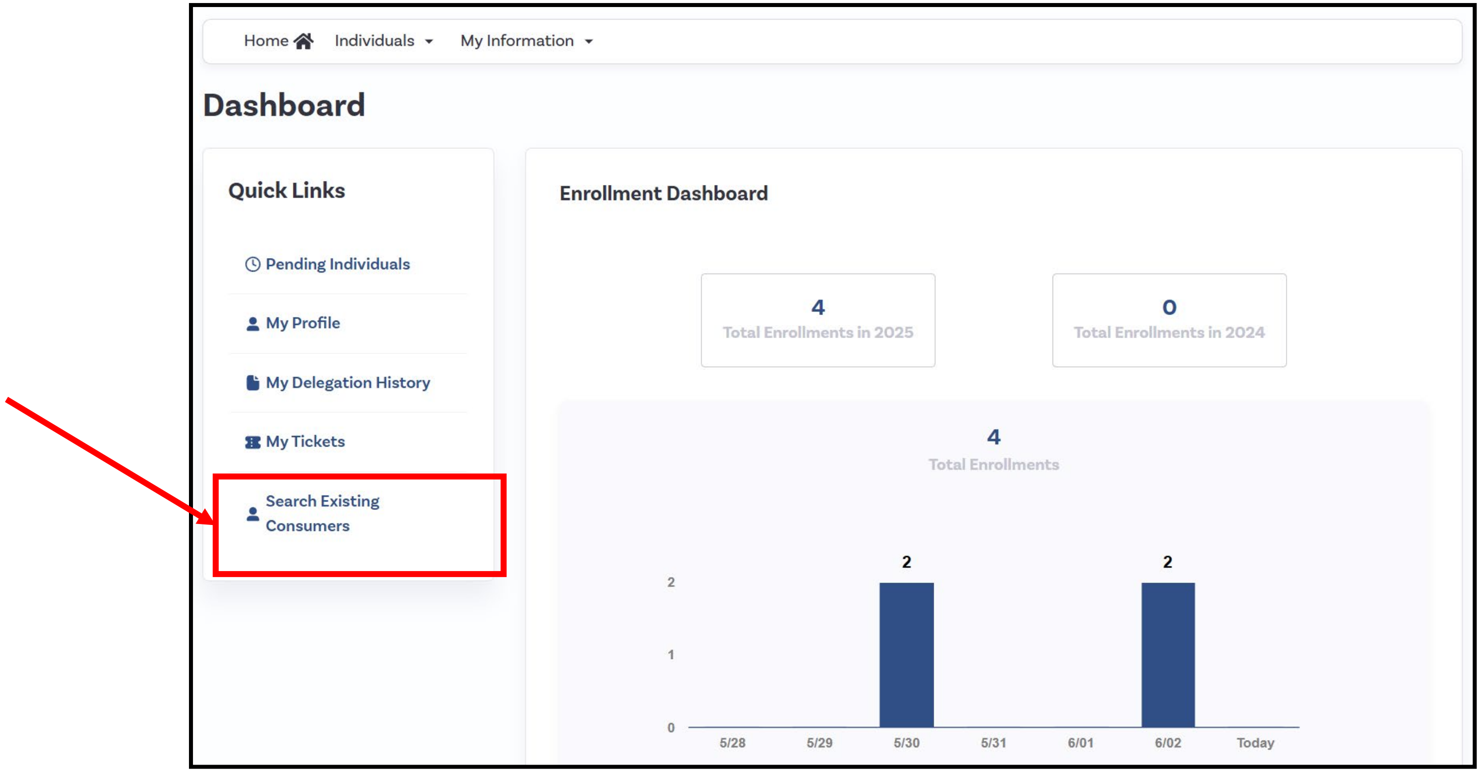
The following slides show how can use the "Search for Existing Customer" tool to designate themselves to an existing customer or create a new account if the customer does not have one. The high-level process is below:

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

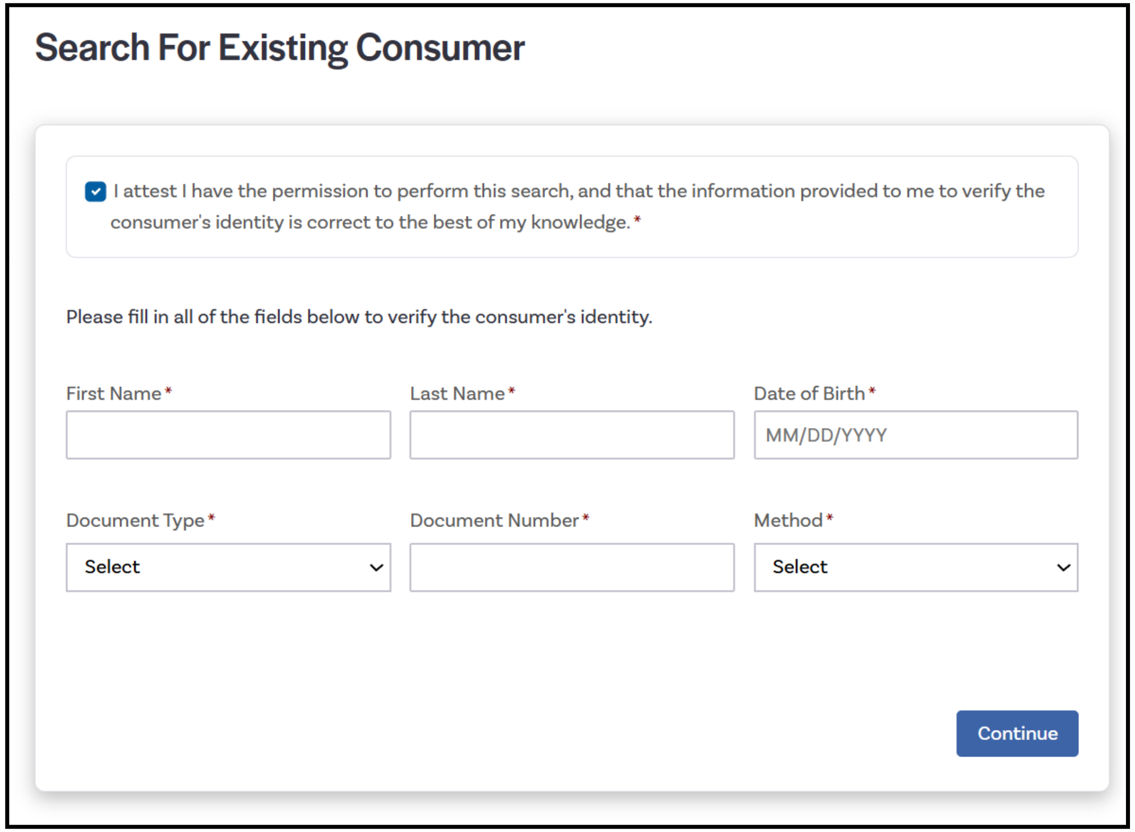
Step 1: Select "Search Existing Consumers" from your dashboard:



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).

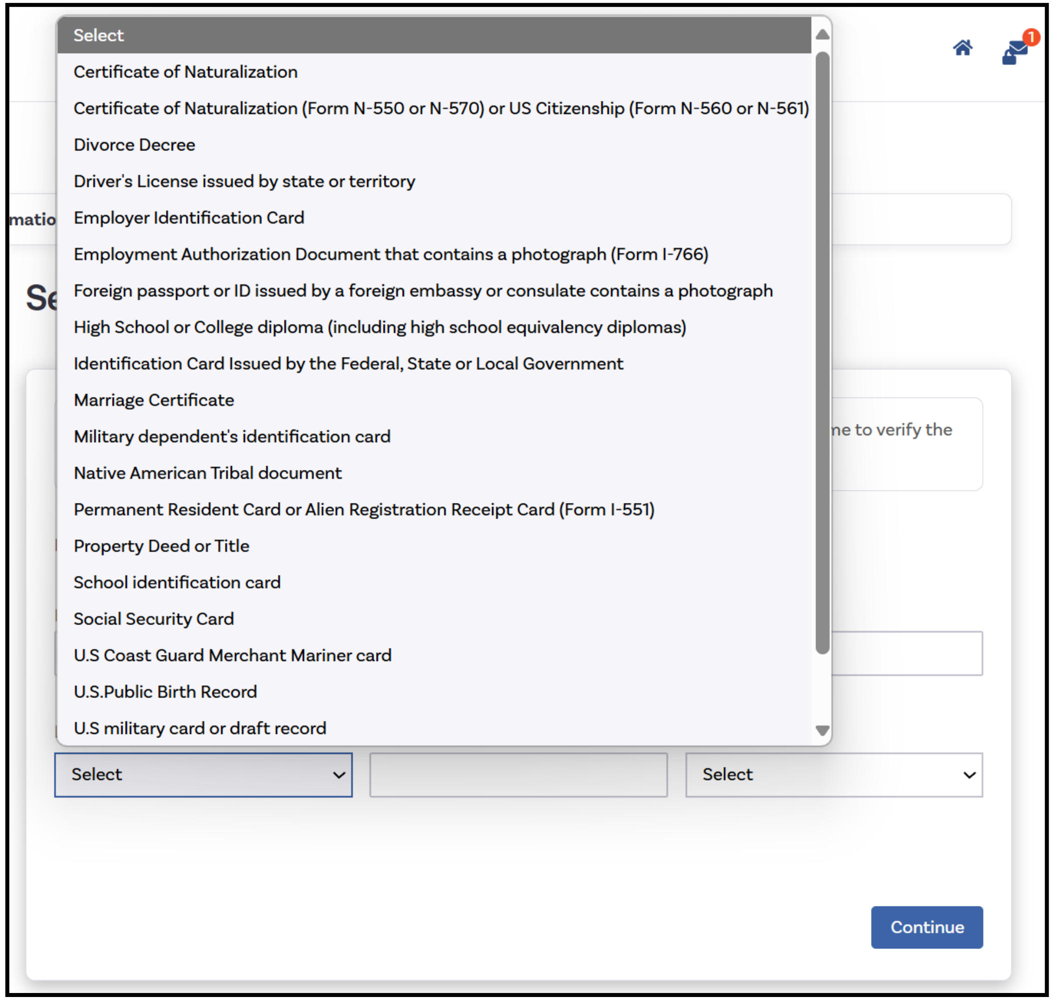

Search For Existing Consumer

☑ 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.

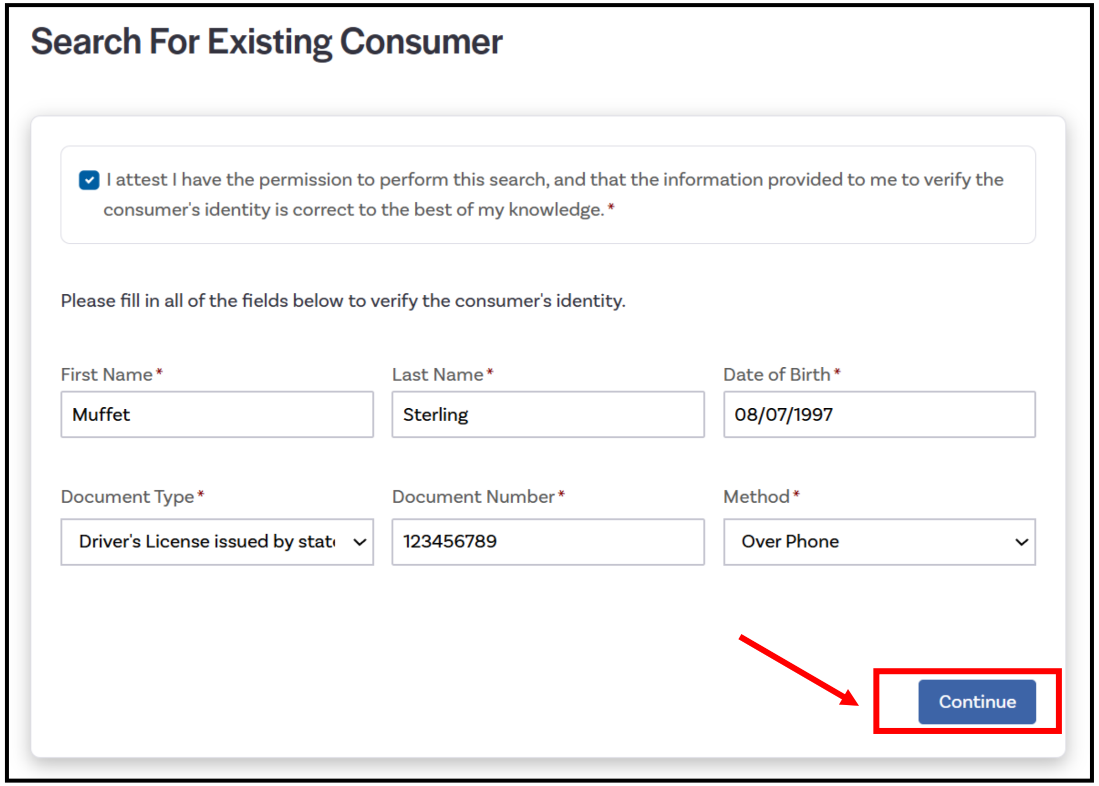
First Name*
Last Name*
Date of Birth*
MM/DD/YYYY
Document Type*
Select
Document Number*
Method*
Select
Continue

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

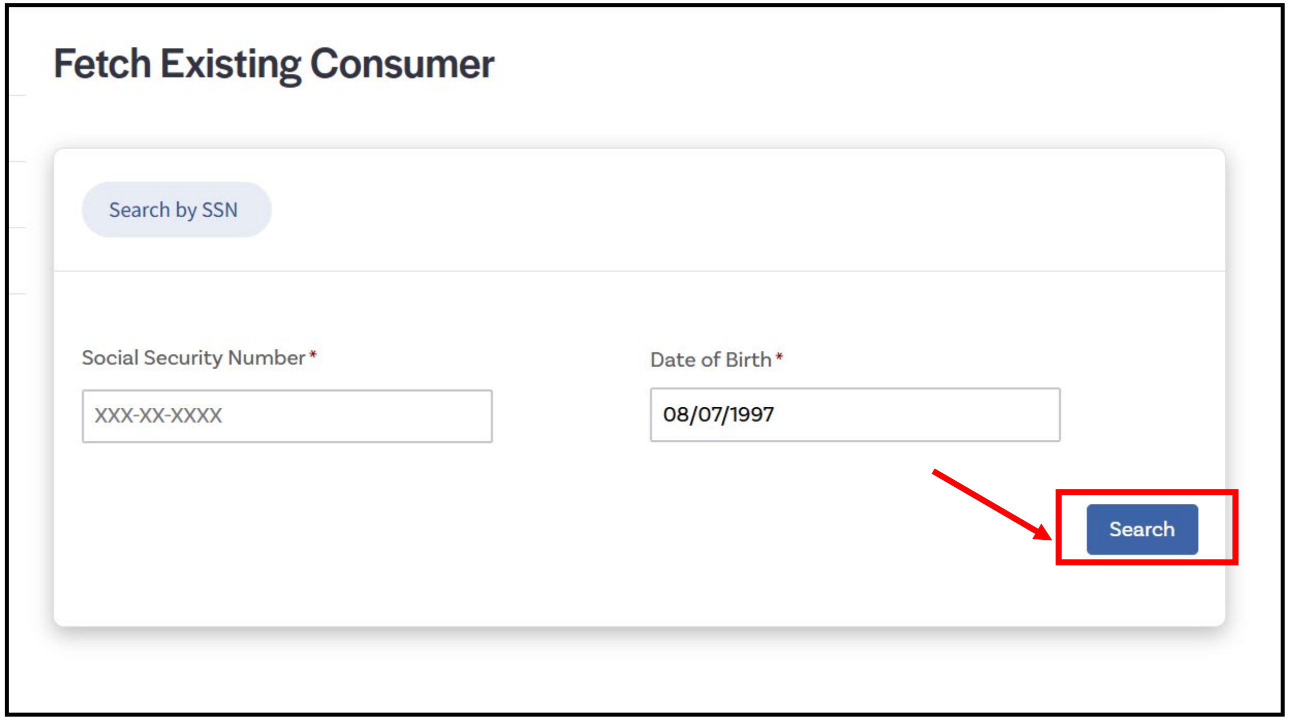

Select
Certificate of Naturalization
Certificate of Naturalization (Form N-550 or N-570) or US Citizenship (Form N-560 or N-561)
Divorce Decree
Driver's License issued by state or territory
Employer Identification Card
Employment Authorization Document that contains a photograph (Form I-766)
Foreign 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
Select
Select
Continue

Detailed Walkthrough: Search for Existing Customer

Step 4: After inputting all required fields, select "Continue."

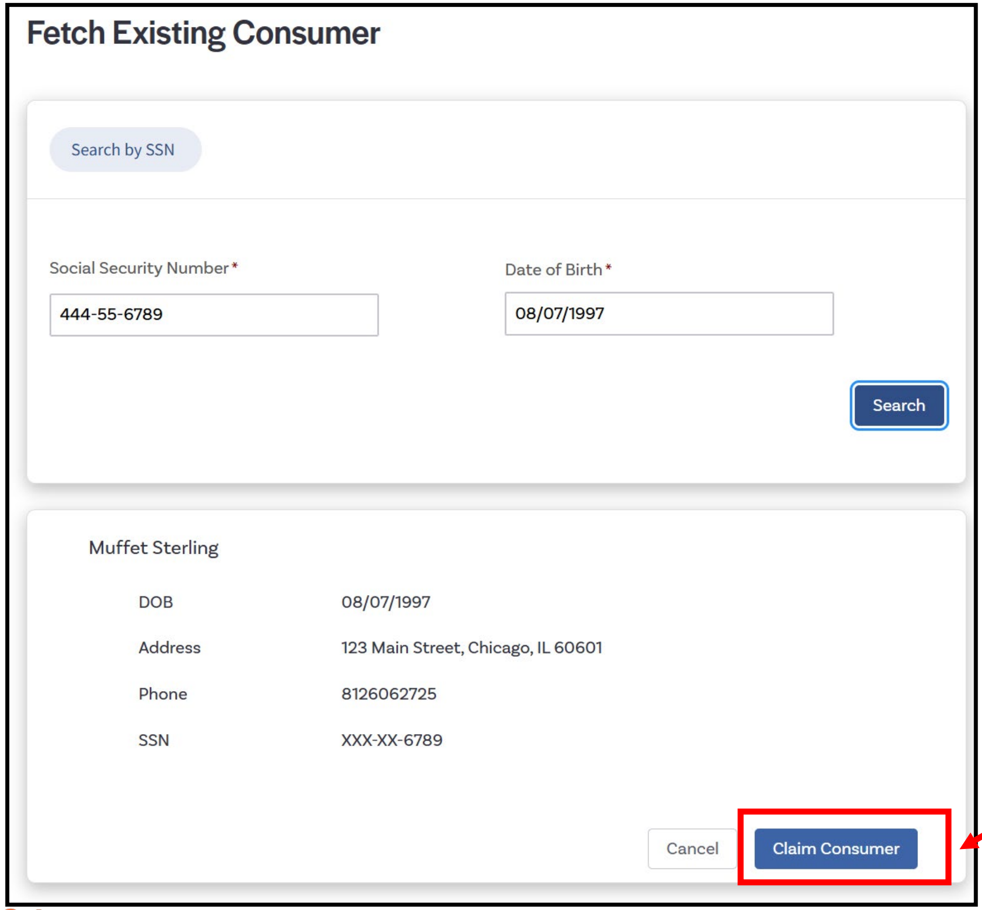


Step 5: Input the consumer's full SSN and DOB, and select "Search."

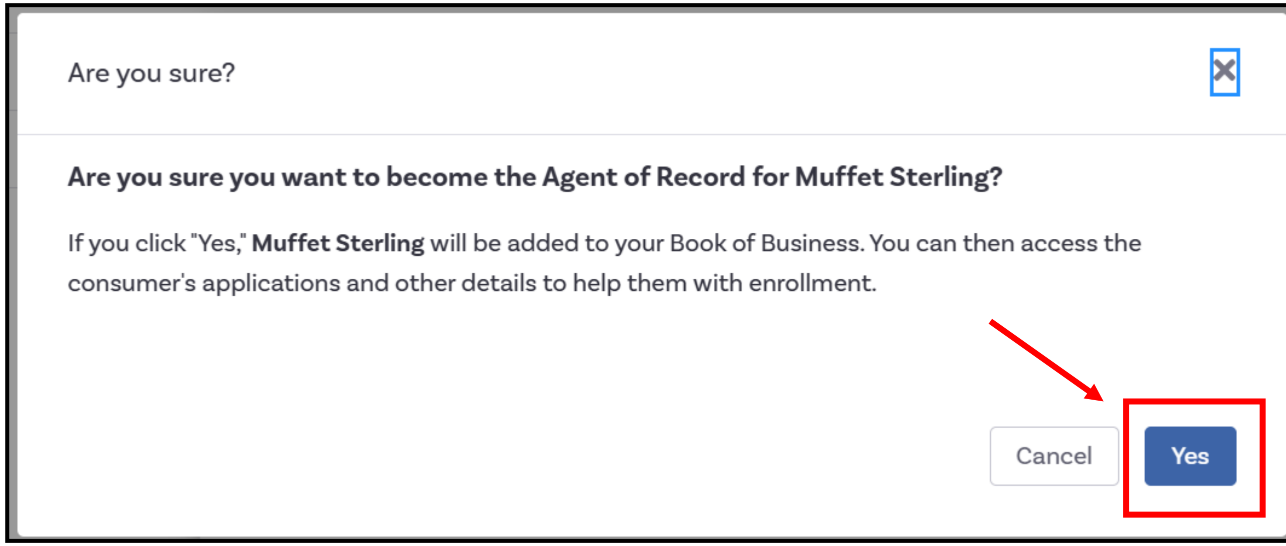


Detailed Walkthrough: Search for Existing Customer

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."

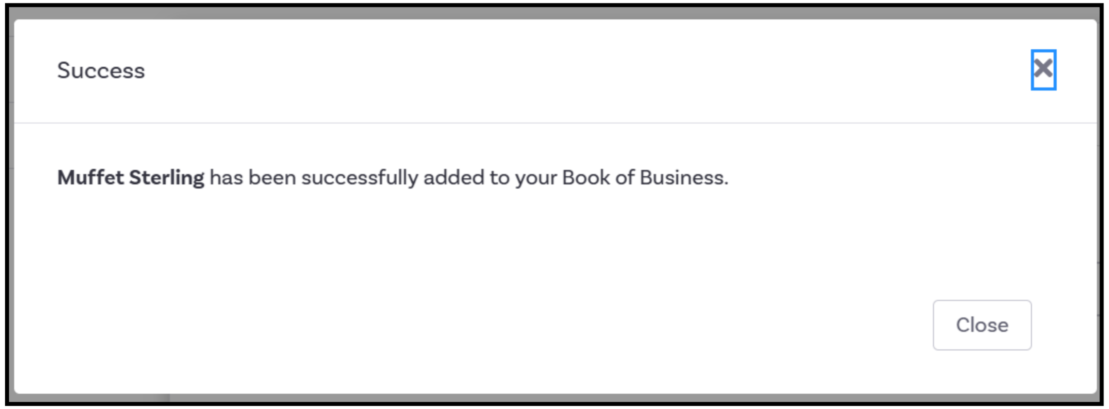


Step 7: Select "Yes" to confirm that you will become this consumer's Agent of Record.

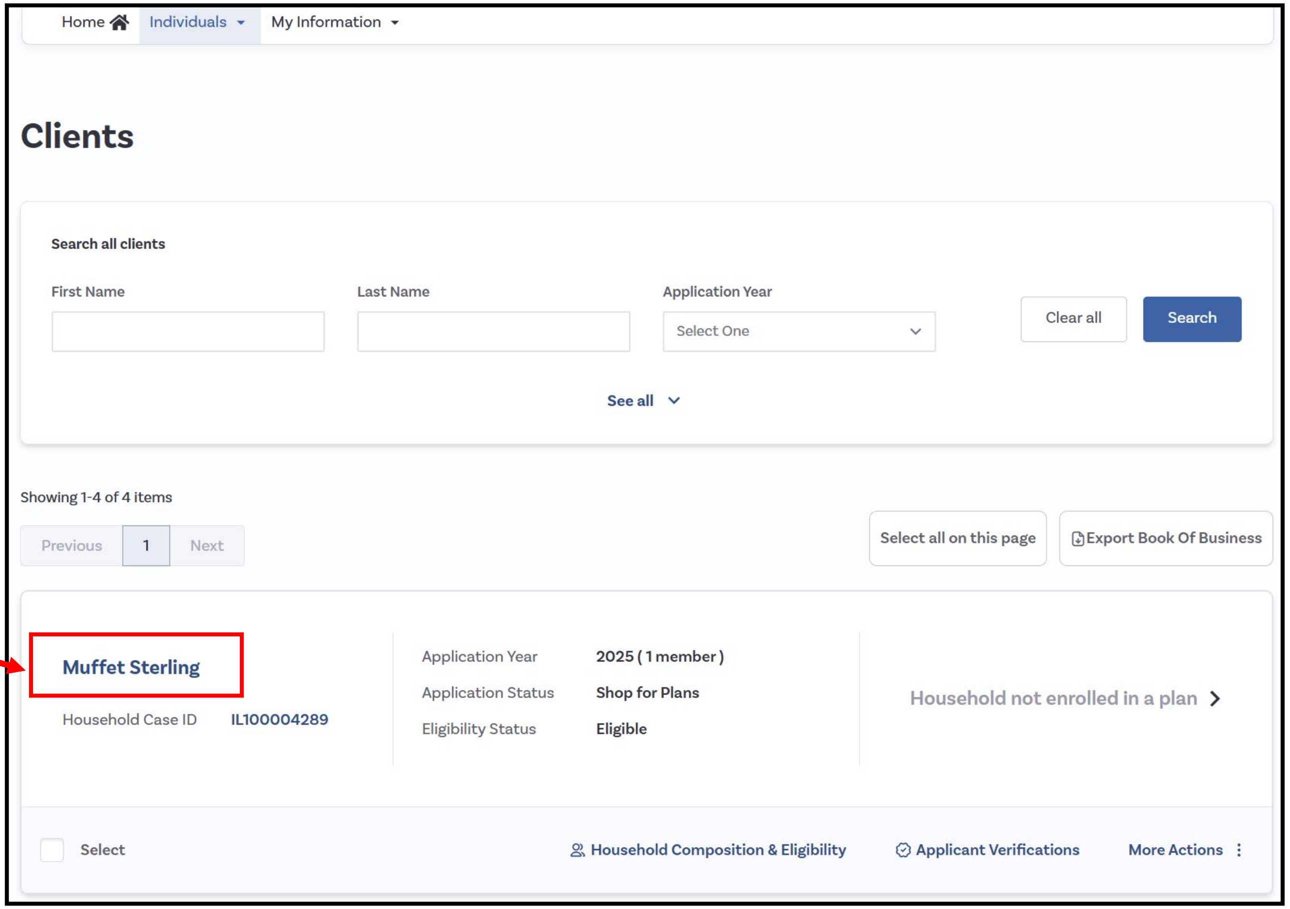


Detailed Walkthrough: Search for Existing Customer

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.



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Detailed Walkthrough: Add New Customers

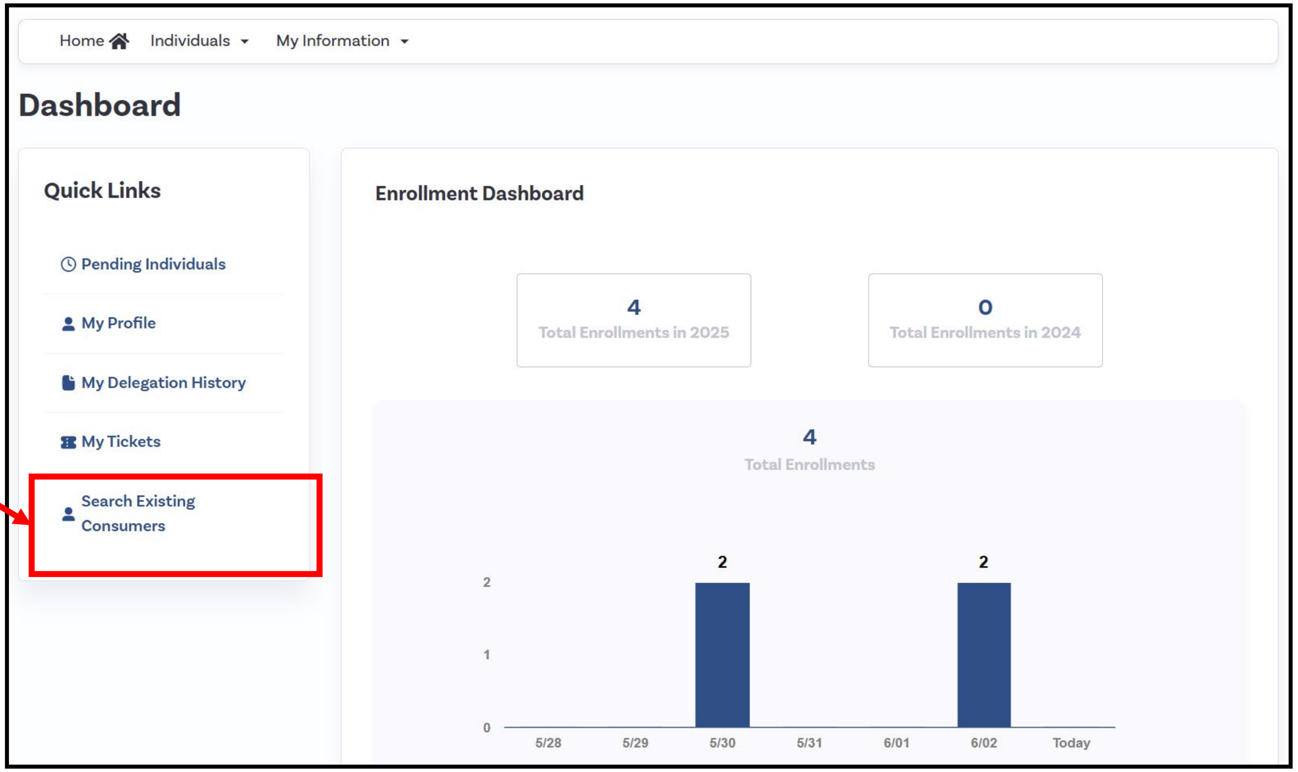
If a broker needs to create an account for a customer that does not yet have one, the broker will start with the "Search for Existing Consumer" flow to ensure that the customer has not created an account. If the customer does not have an account, the broker will be prompted to create one.

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

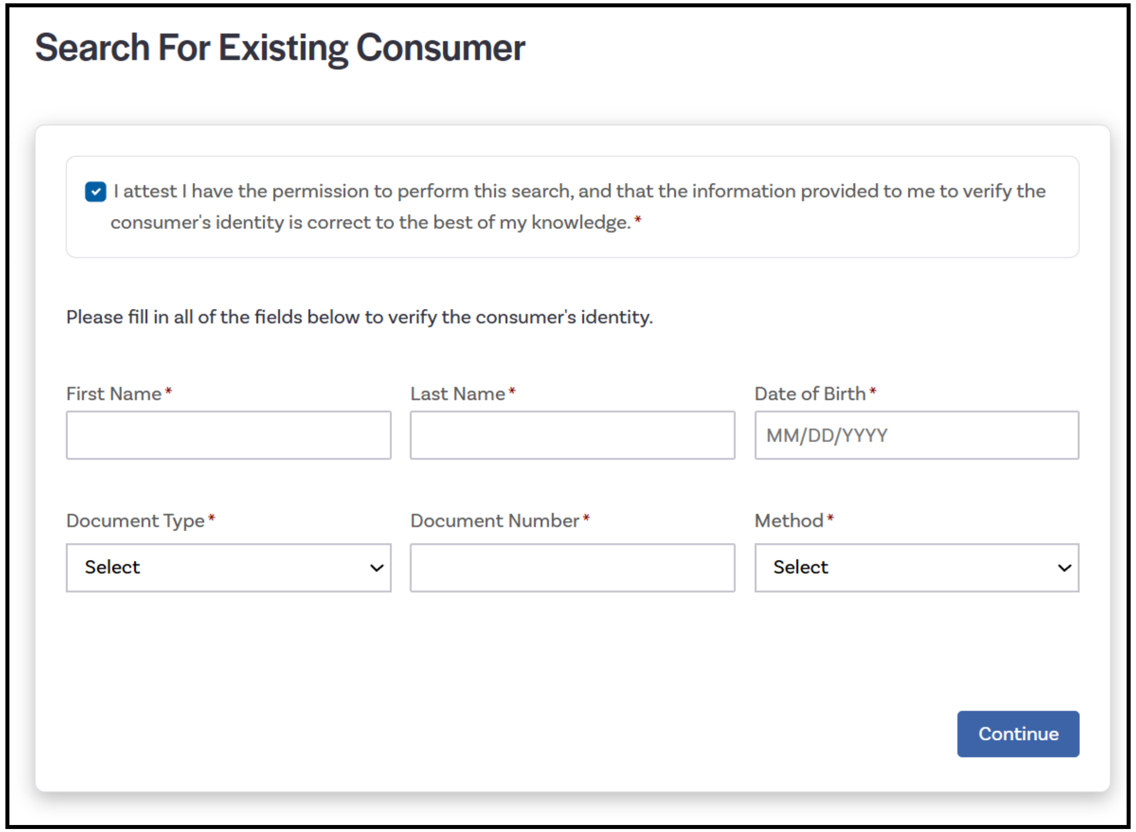
Step 1: Select "Search Existing Consumers" from your dashboard:



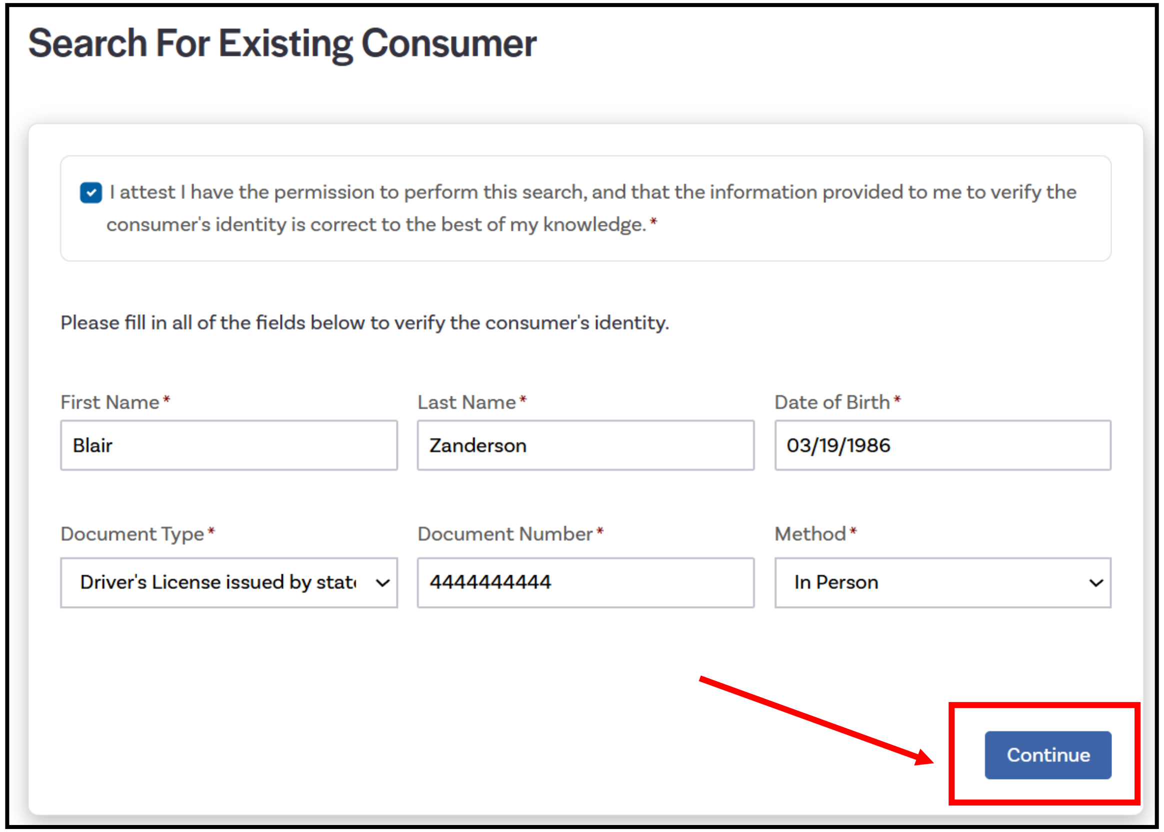
Note: This process can only be used if the customer has an SSN. If the customer does not have an SSN, the broker can call the CAC for designation assistance if the customer is not able to log-in to their account.

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).

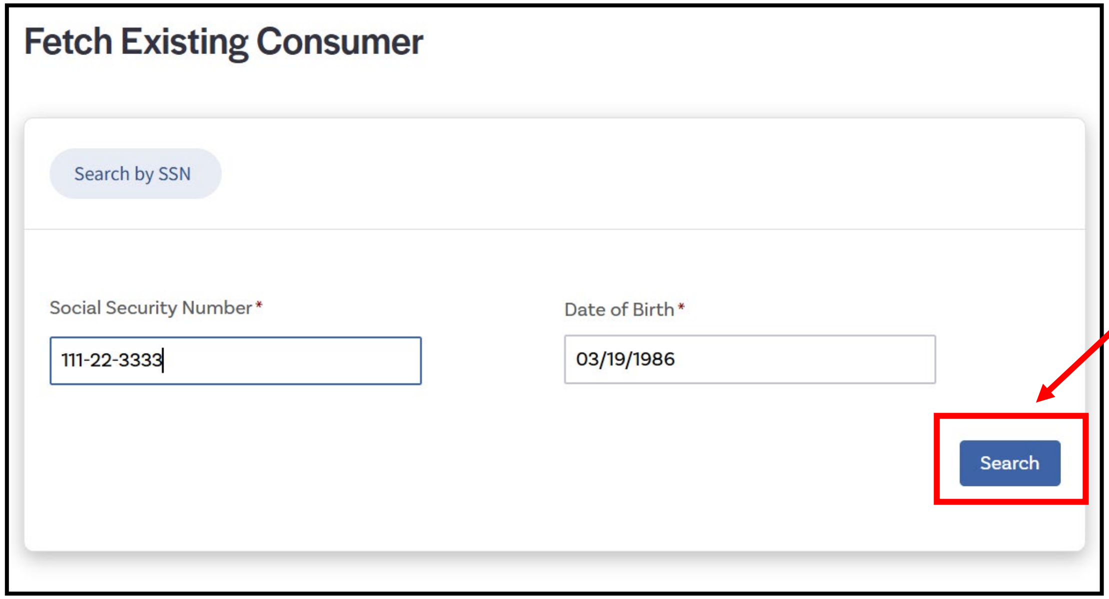


Step 3: The broker selects continue after inputting all information.

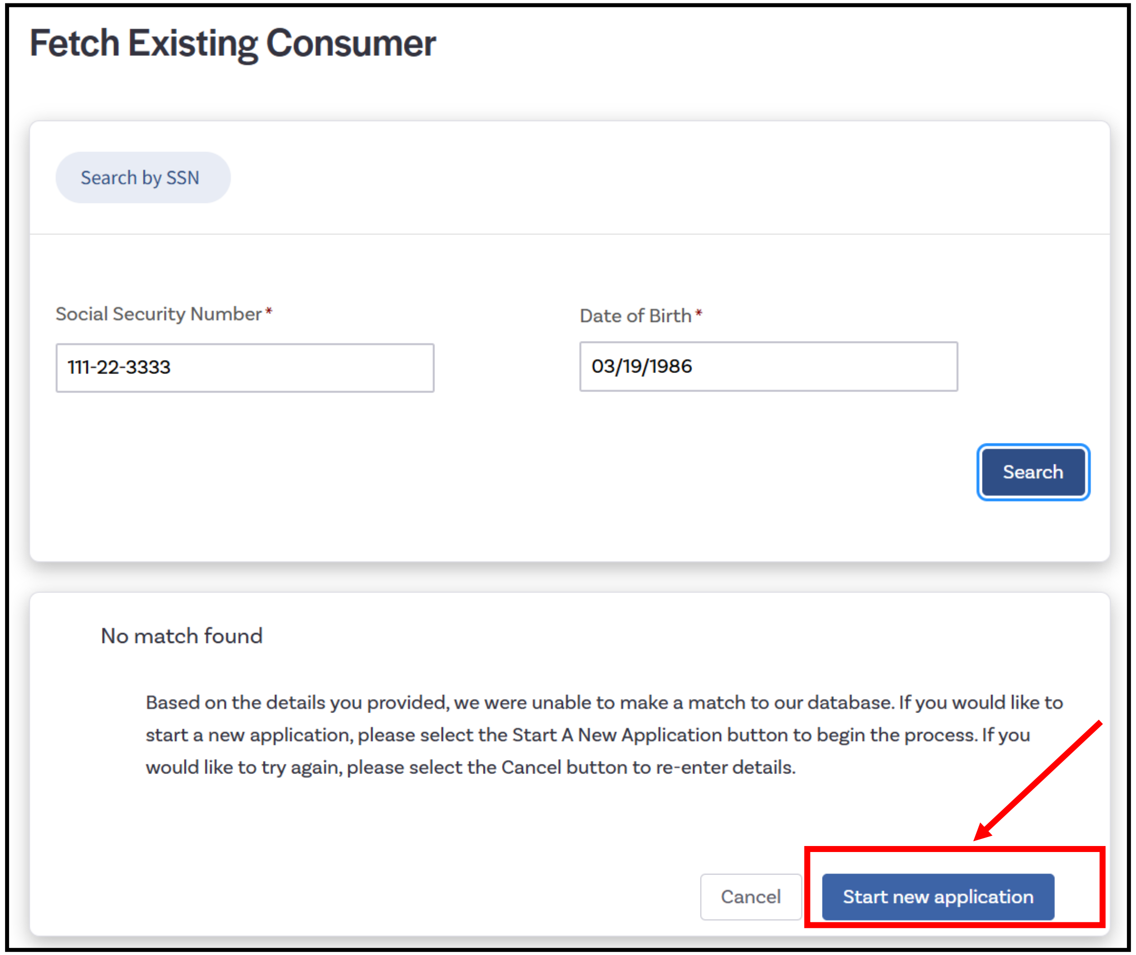


Detailed Walkthrough: Search for Existing Customer

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

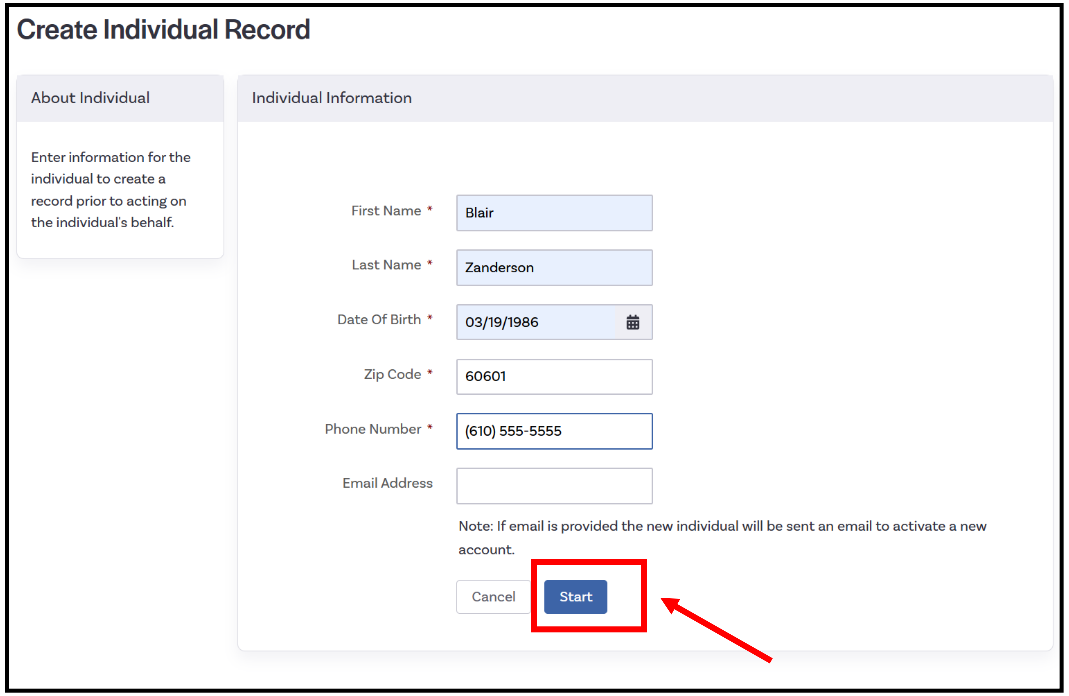


Step 5: If the system does not find a matching account for this customer, the broker is prompted to Start a New Application for this individual.

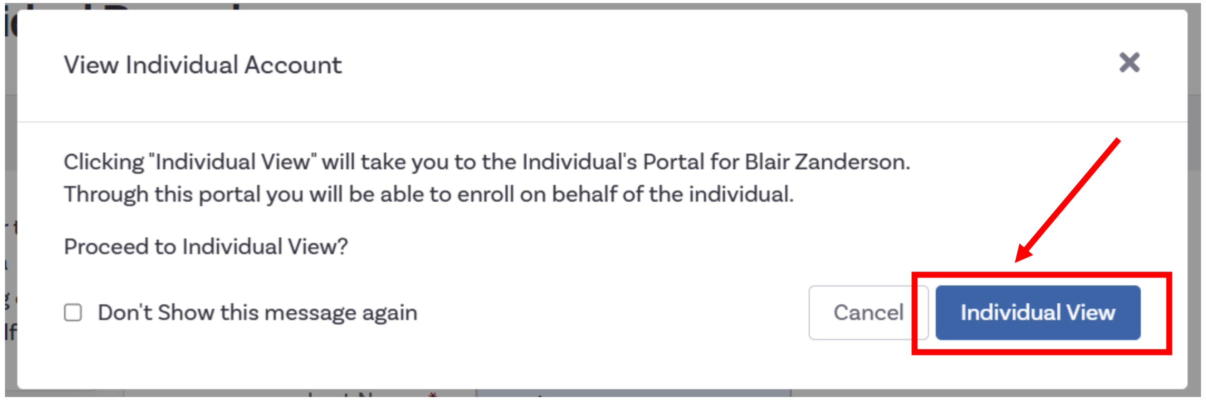


Detailed Walkthrough: Search for Existing Customer

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



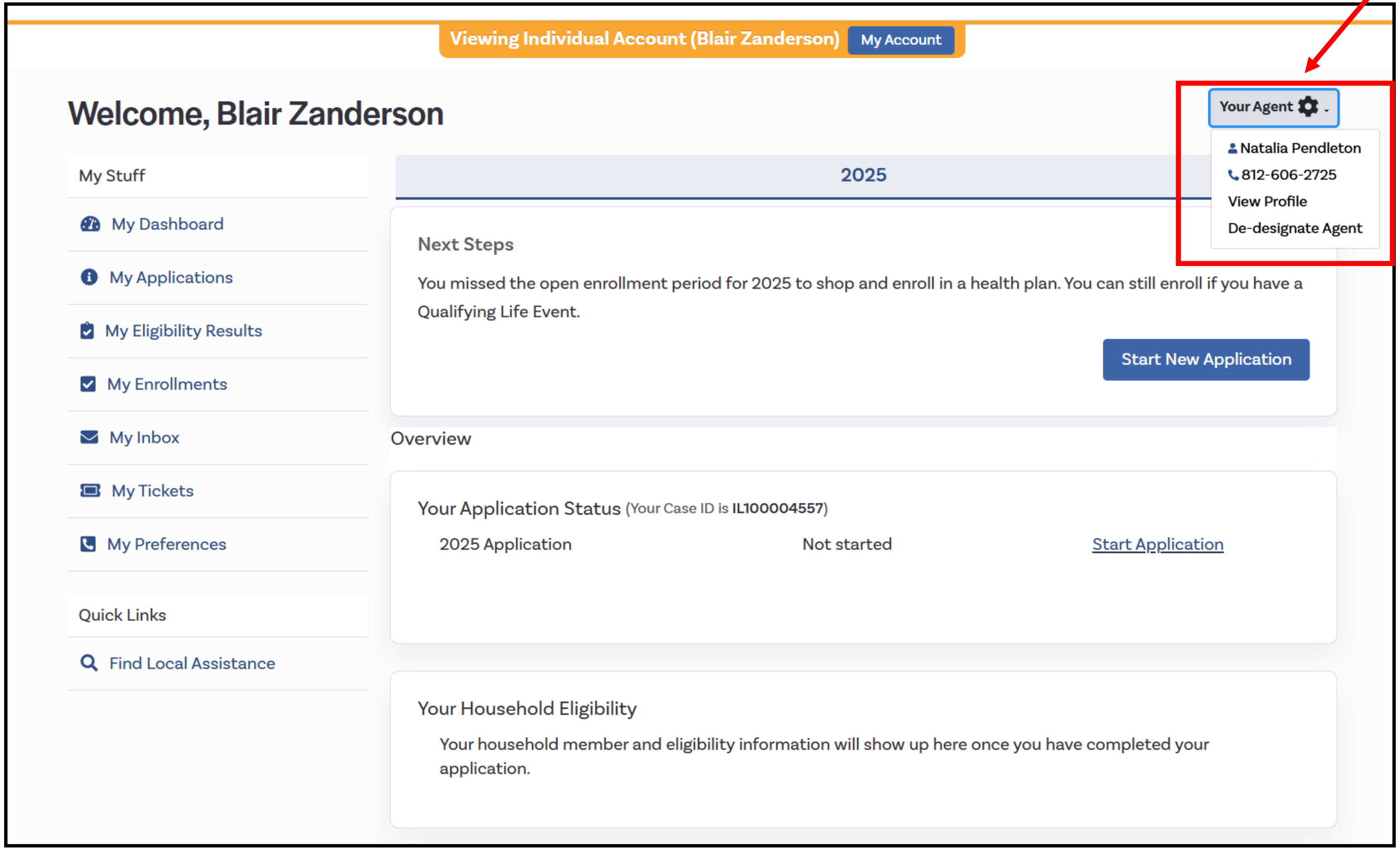
Step 7: The Broker selects "Individual View" to proceed to the customer's account.



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.



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Agenda

- Get Covered Illinois Broker Certification

Overview of Broker Functionality

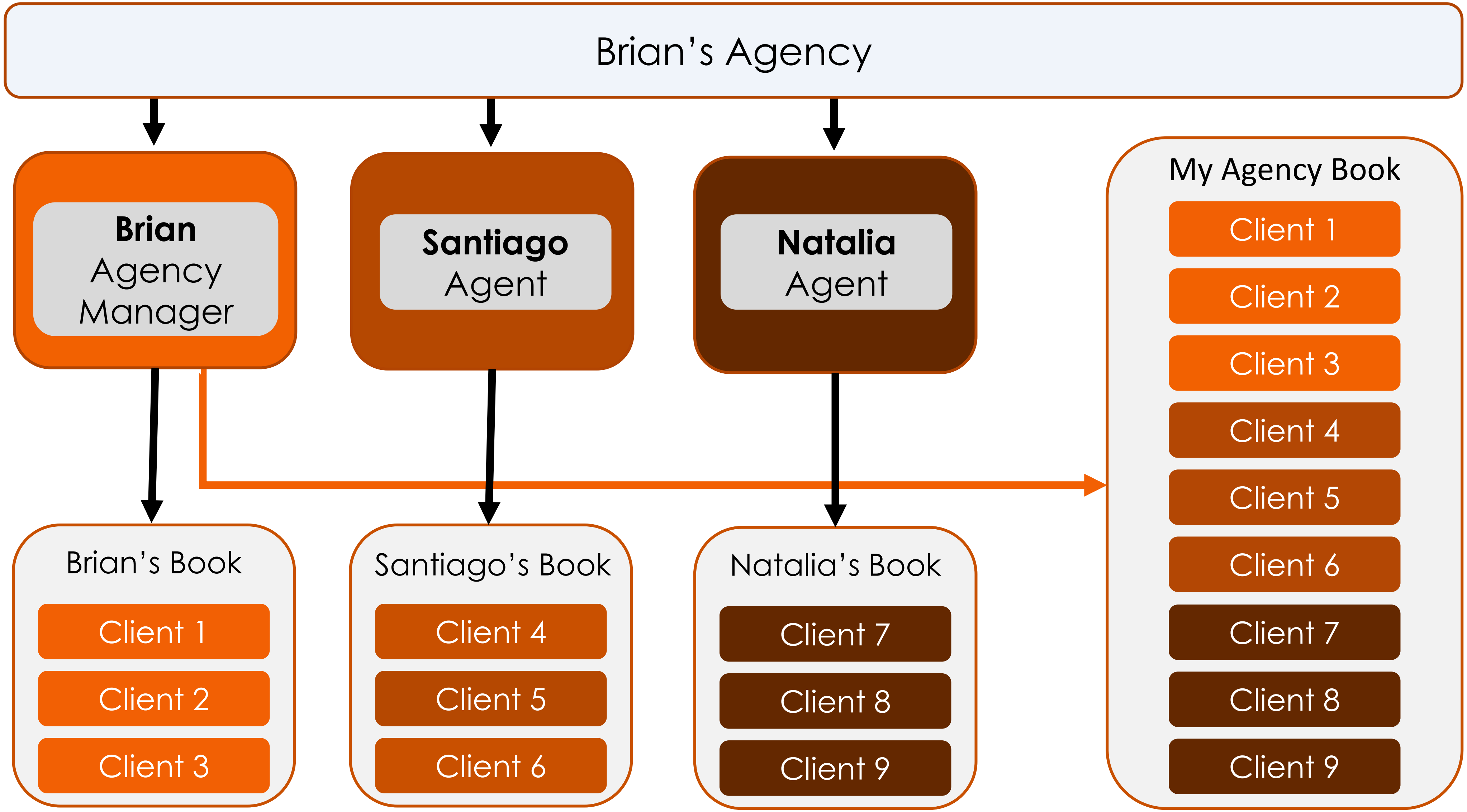
- Broker Portal
  - Managing Book of Business
  - View Member Account
  - Customer Designations
- **Agency Portal**
  - Manage Agency Book of Business
  - Accept Customer Designations
  - View Member Account
  - Transfer Customer within Agency

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
Broker	The Broker role is a certified broker who can: • Manage their Book of Business, and • Take action on behalf of their designated customers.
Agency Manager	The Agency Manager role is a certified broker who can complete all Broker role activities above, **PLUS**: • Manage the Book of Business for all brokers in their Agency • Take action on behalf of designated customers for all brokers in their Agency • Add/Remove brokers from their Agency • Monitor certification status of all brokers in their Agency

Broker Portal: Agency Model



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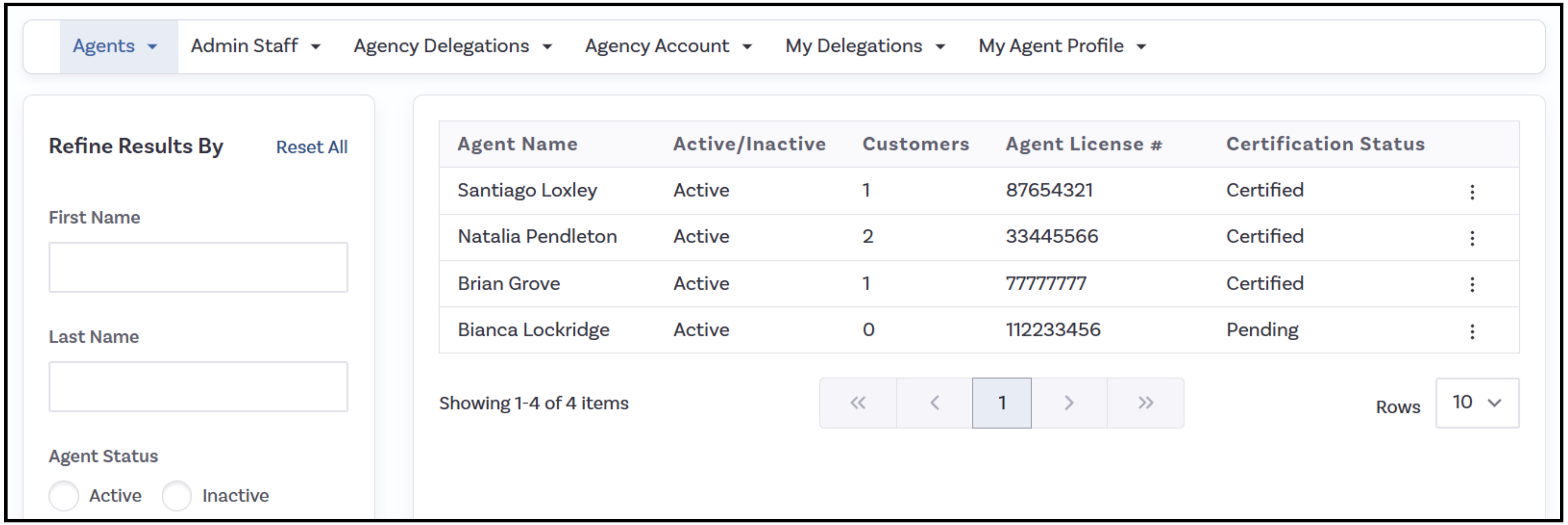
Agency Manager Capabilities

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

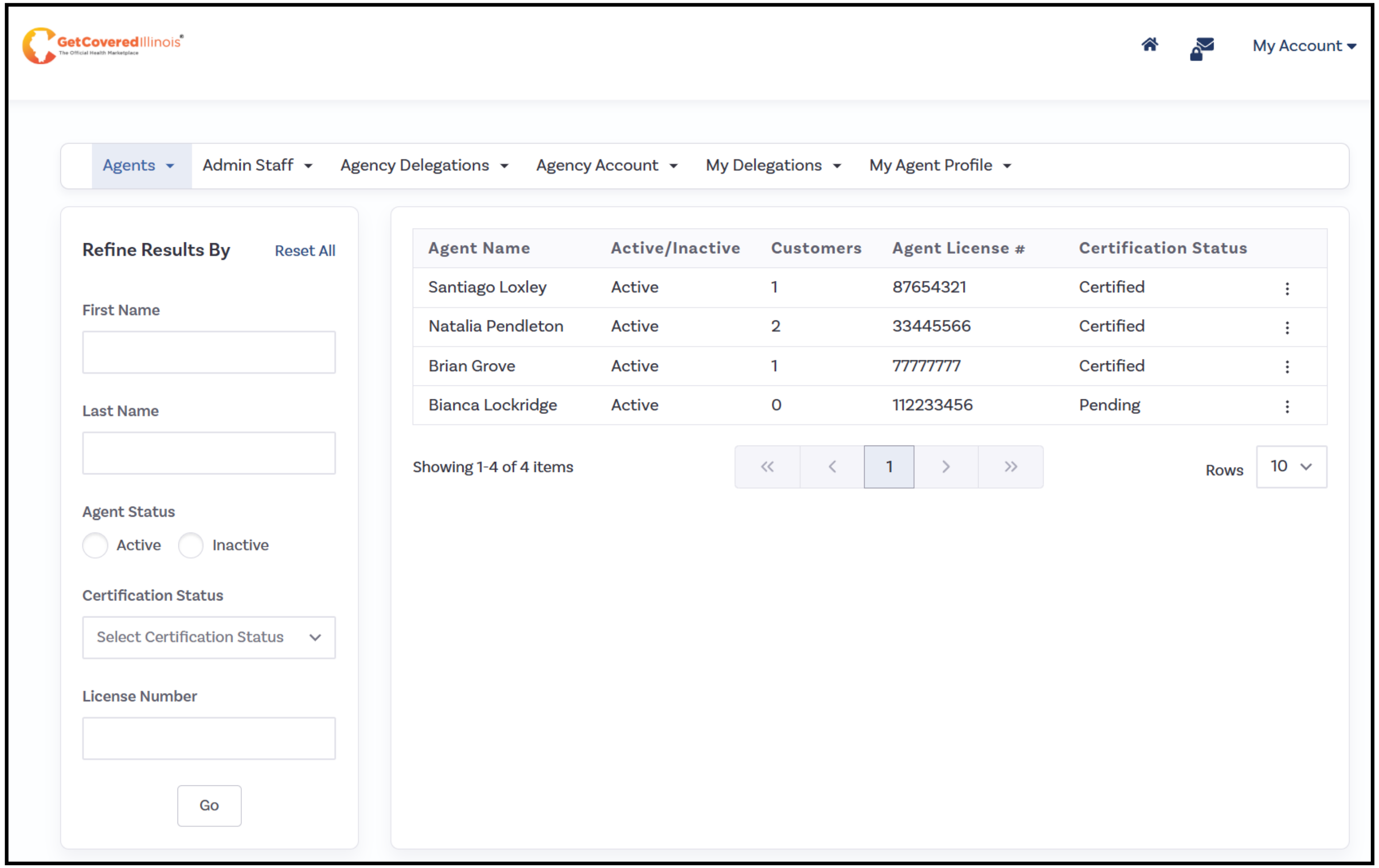


Detailed Walkthrough: Agency Manager Capabilities

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

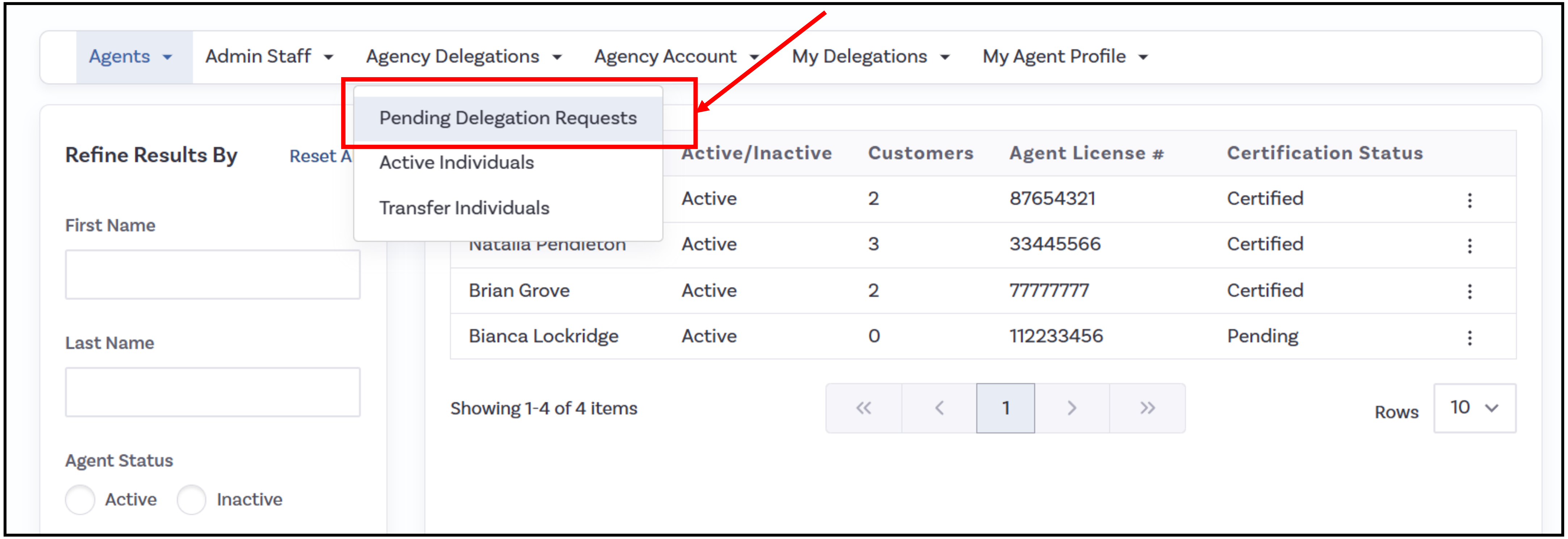
1. Accepting Delegations on behalf of any broker within agency
2. Viewing all customers in the agency's book of business
3. Acting on behalf of customers in the agency's book of business
4. Moving a client from one Broker to a different broker within the agency.

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.



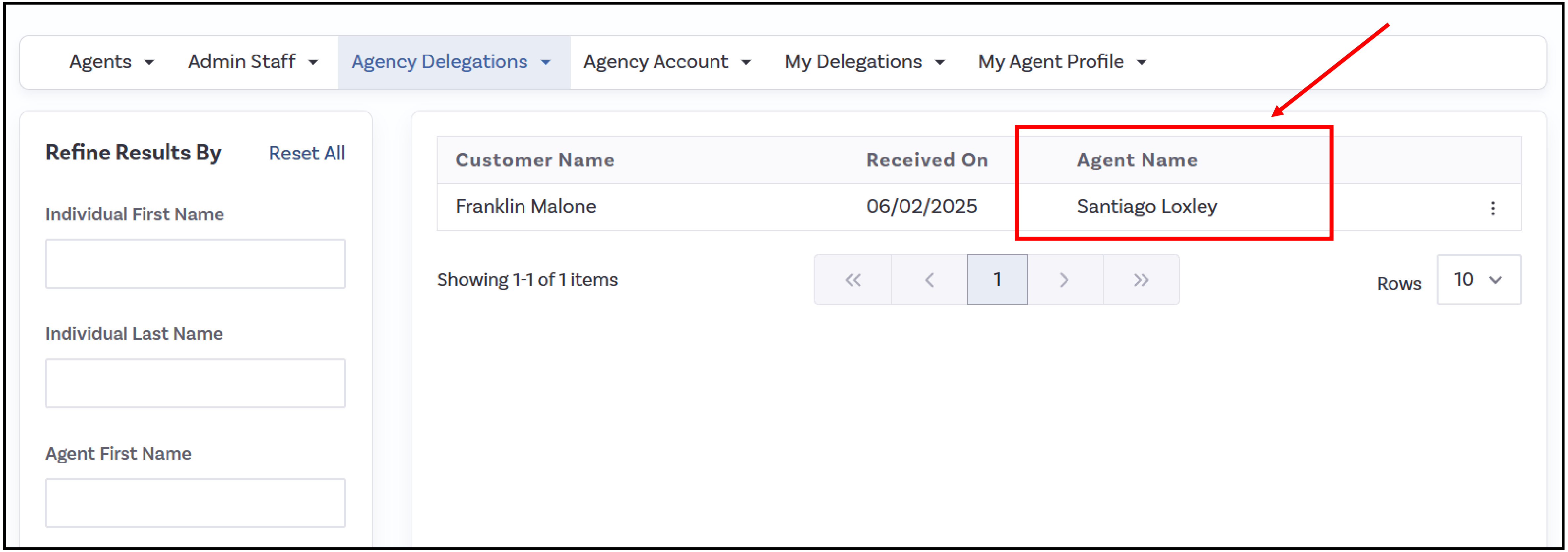
Agency Manager Capabilities: Accept Delegation Requests

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



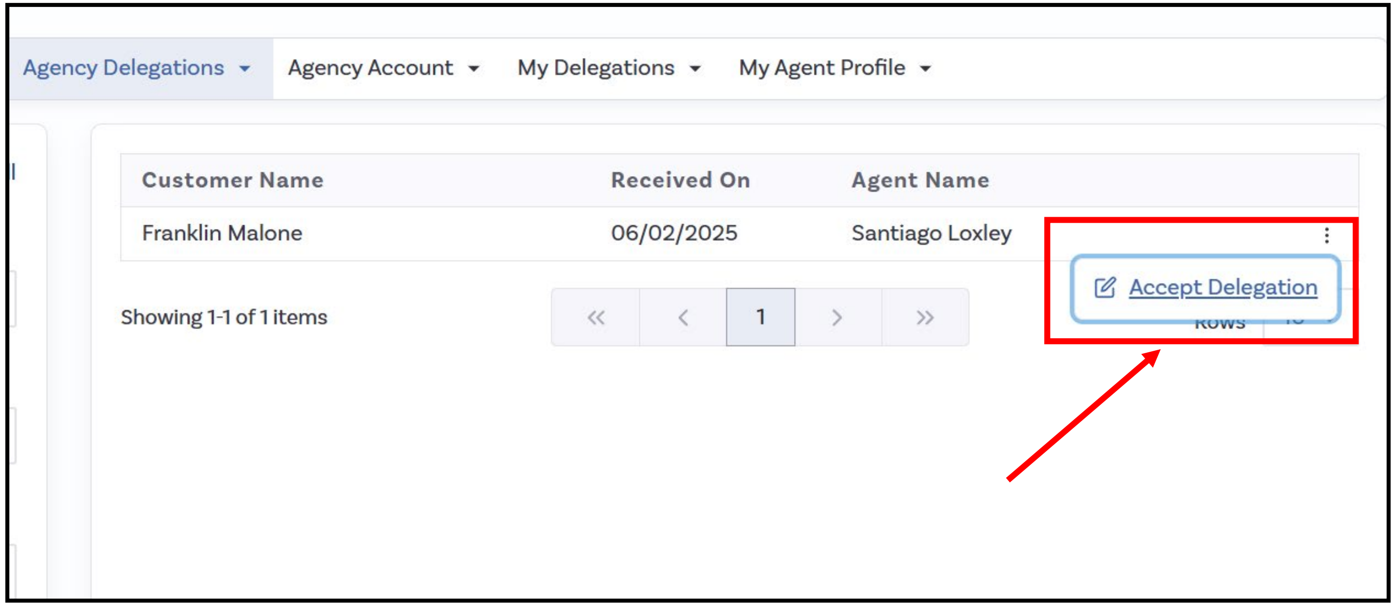
Agency Manager Capabilities: Accept Delegation Requests

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

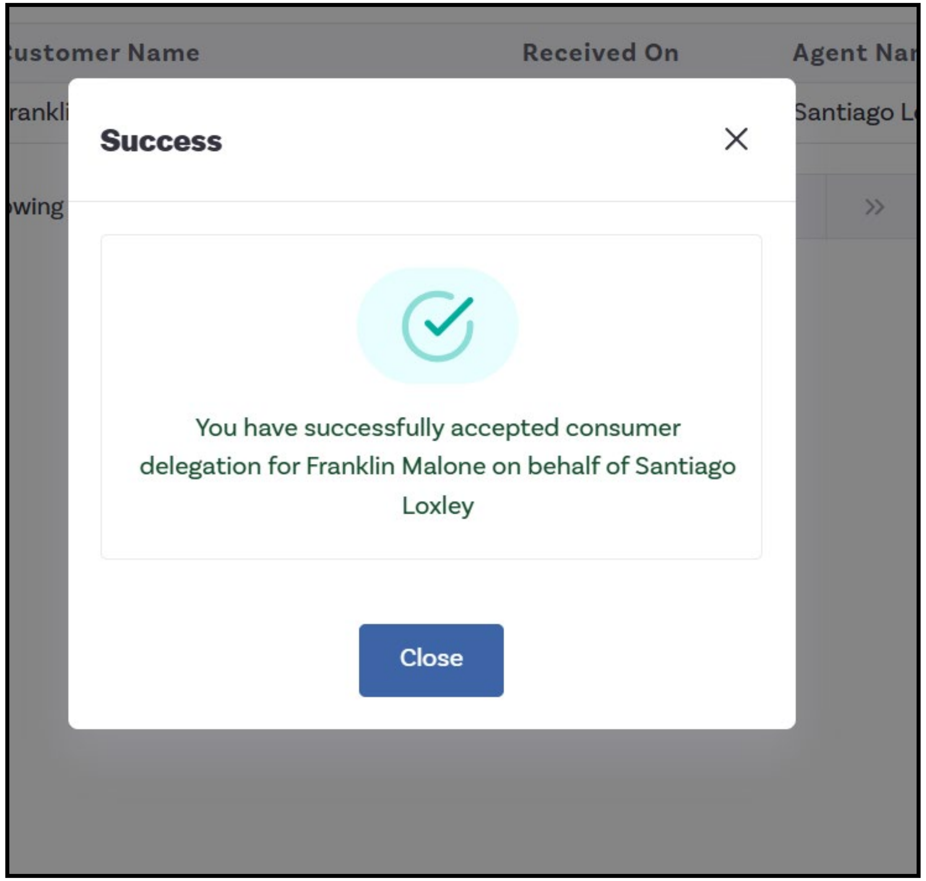


Agency Manager Capabilities: Accept Delegation Requests

Step 3: The Agency Manager selects "Accept Delegation."



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



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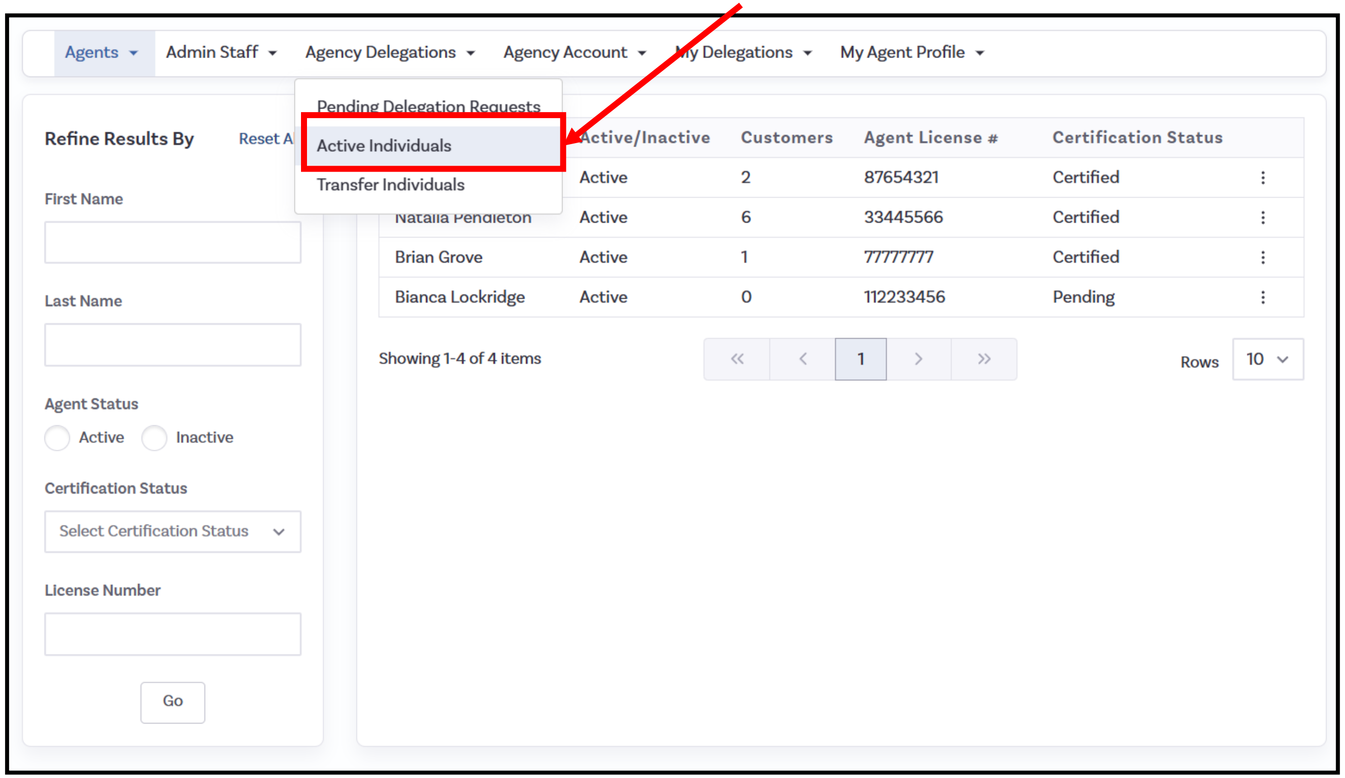
Agency Manager Capabilities: View Individual Account for all Customers in the Book of Business.

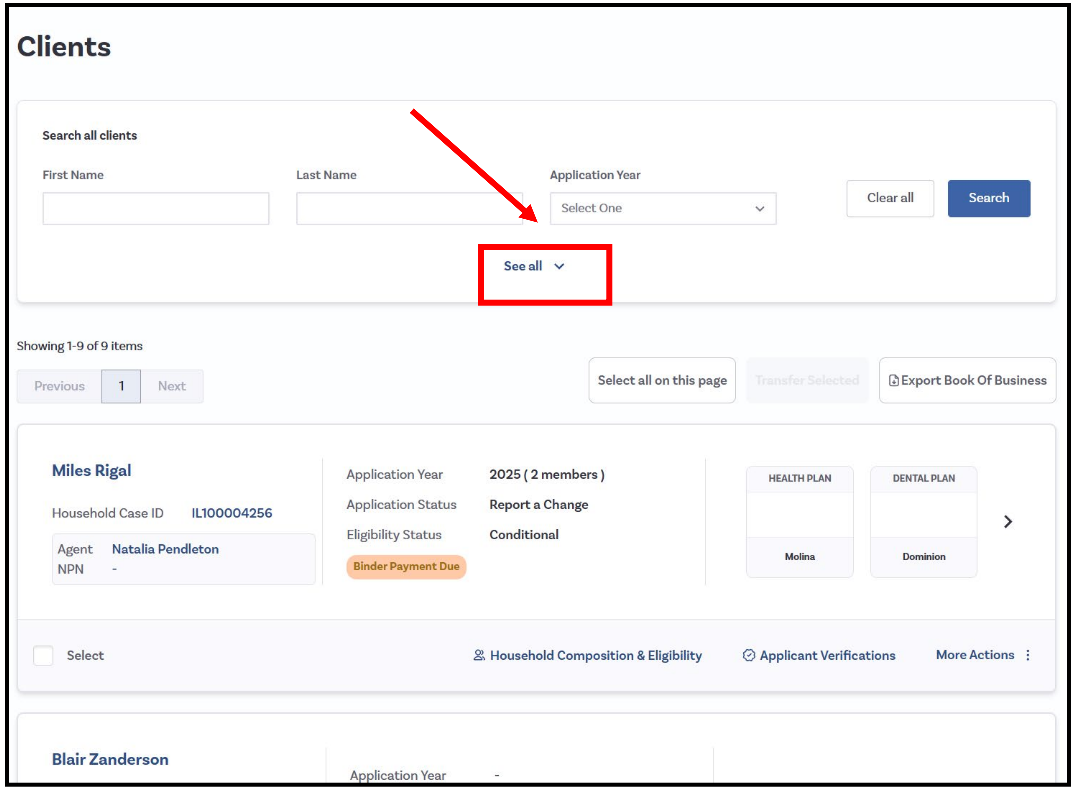
The Agency Manager Brian accepted the Delegation request for customer Franklin Malone on behalf of the broker Santiago. The Agency Manager can act on behalf of all customers within their agency.

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

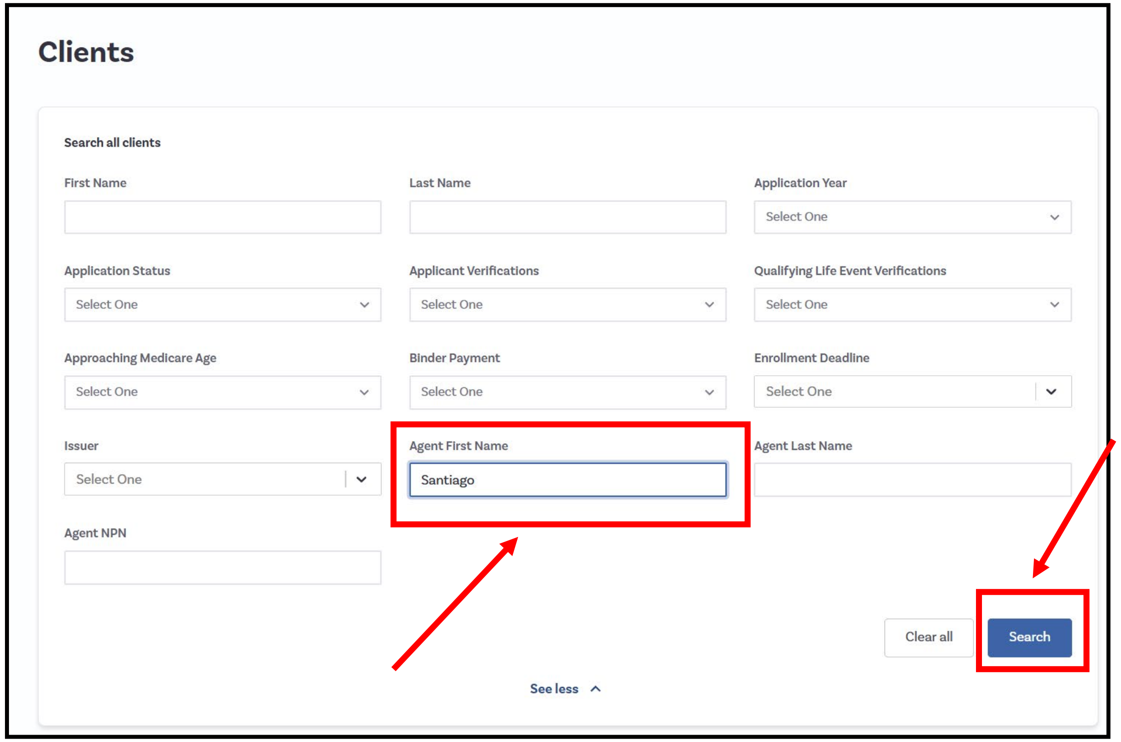


Agency Manager Capabilities: View Individual Account for all Customers in the Book of Business.

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

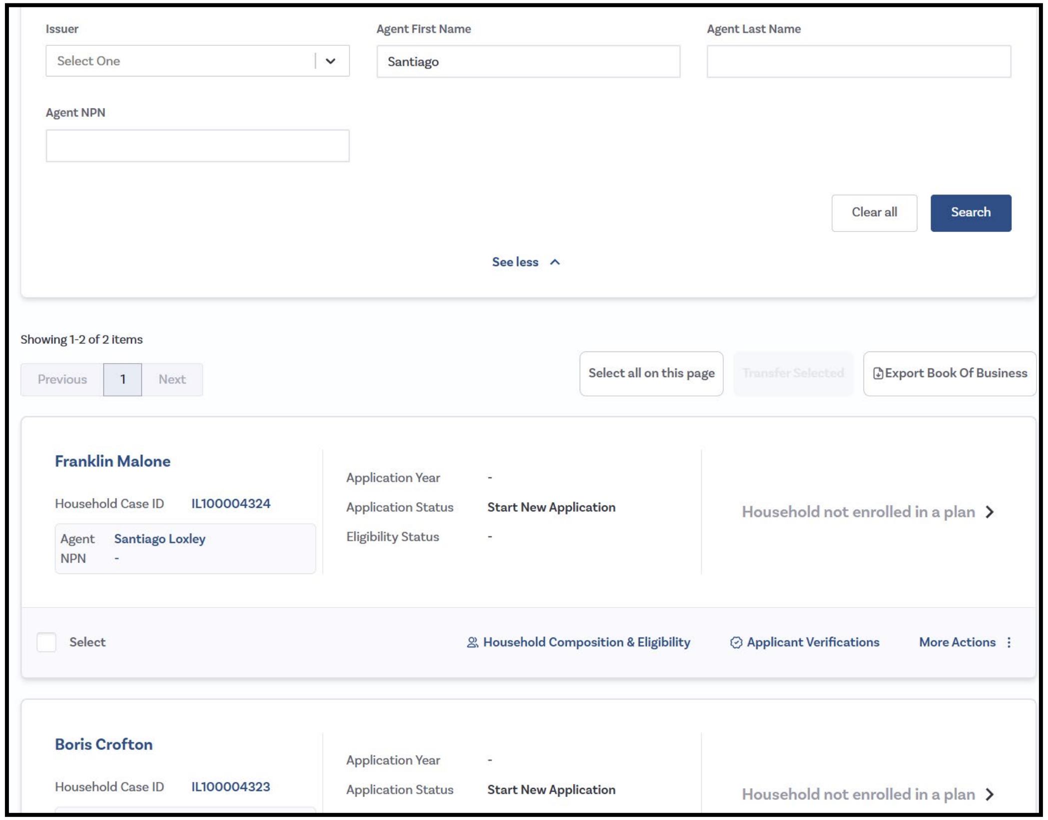


Step 3: The Agency Manager inputs a broker's First Name and selects "Search" to see all of Santiago's delegations.

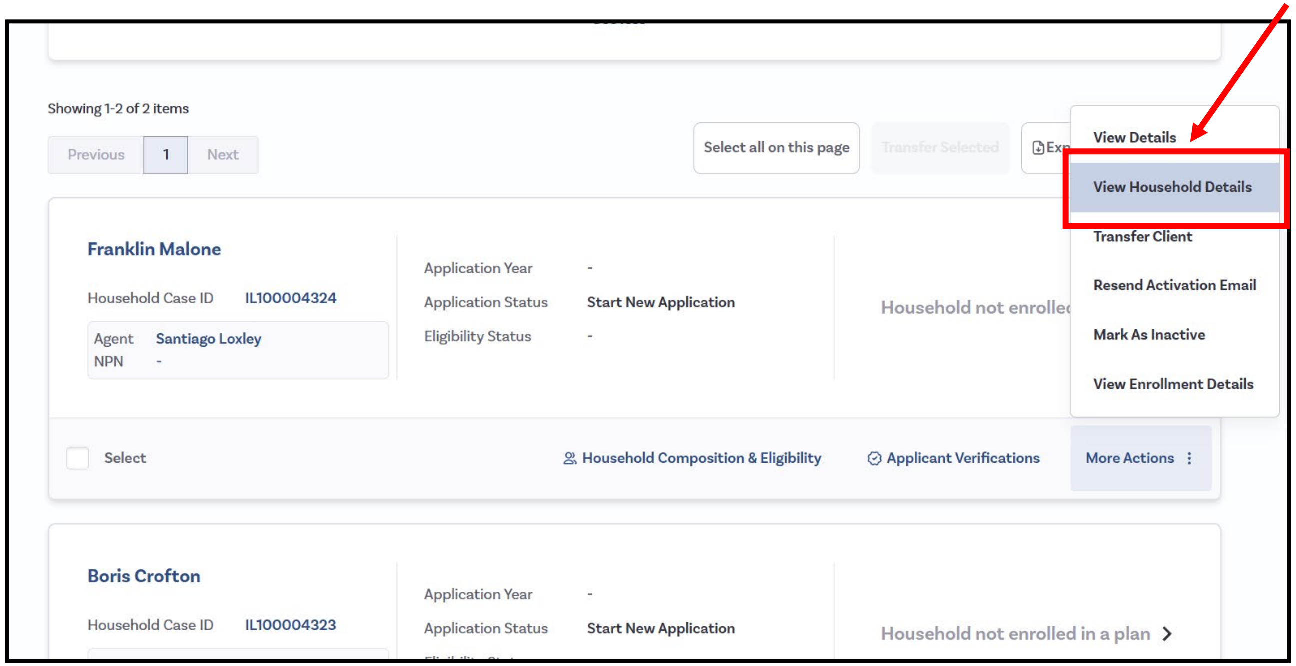


Agency Manager Capabilities: View Individual Account for all Customers in the Book of Business.

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

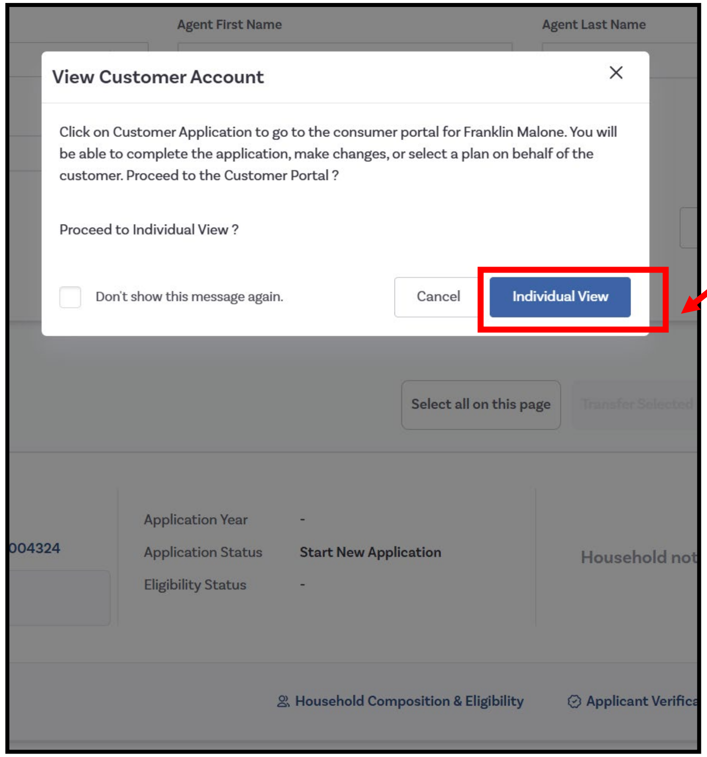


Step 5: The Agency Manager navigates to "View Household Details" to see this customer's account.

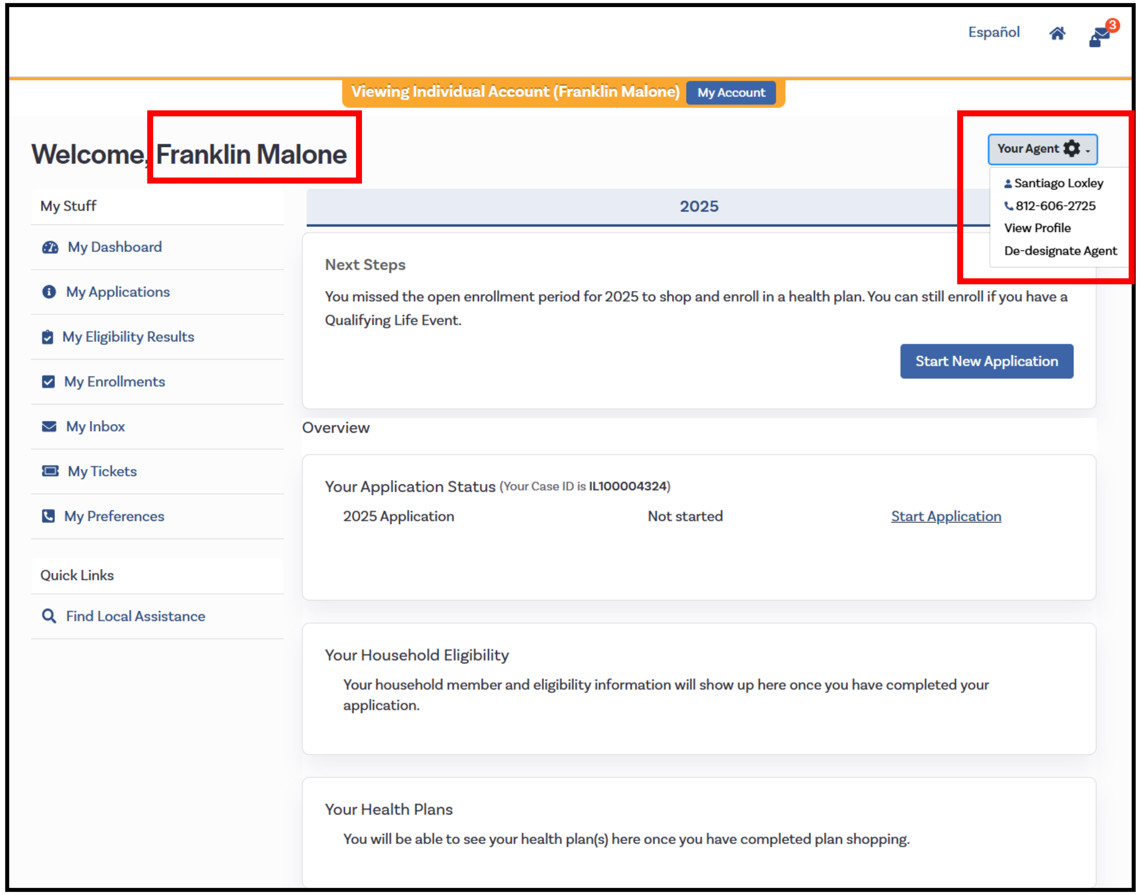


Agency Manager Capabilities: View Individual Account for all Customers in the Book of Business.

Step 6: The Agency Manager selects "Individual View" to see this customer's account.



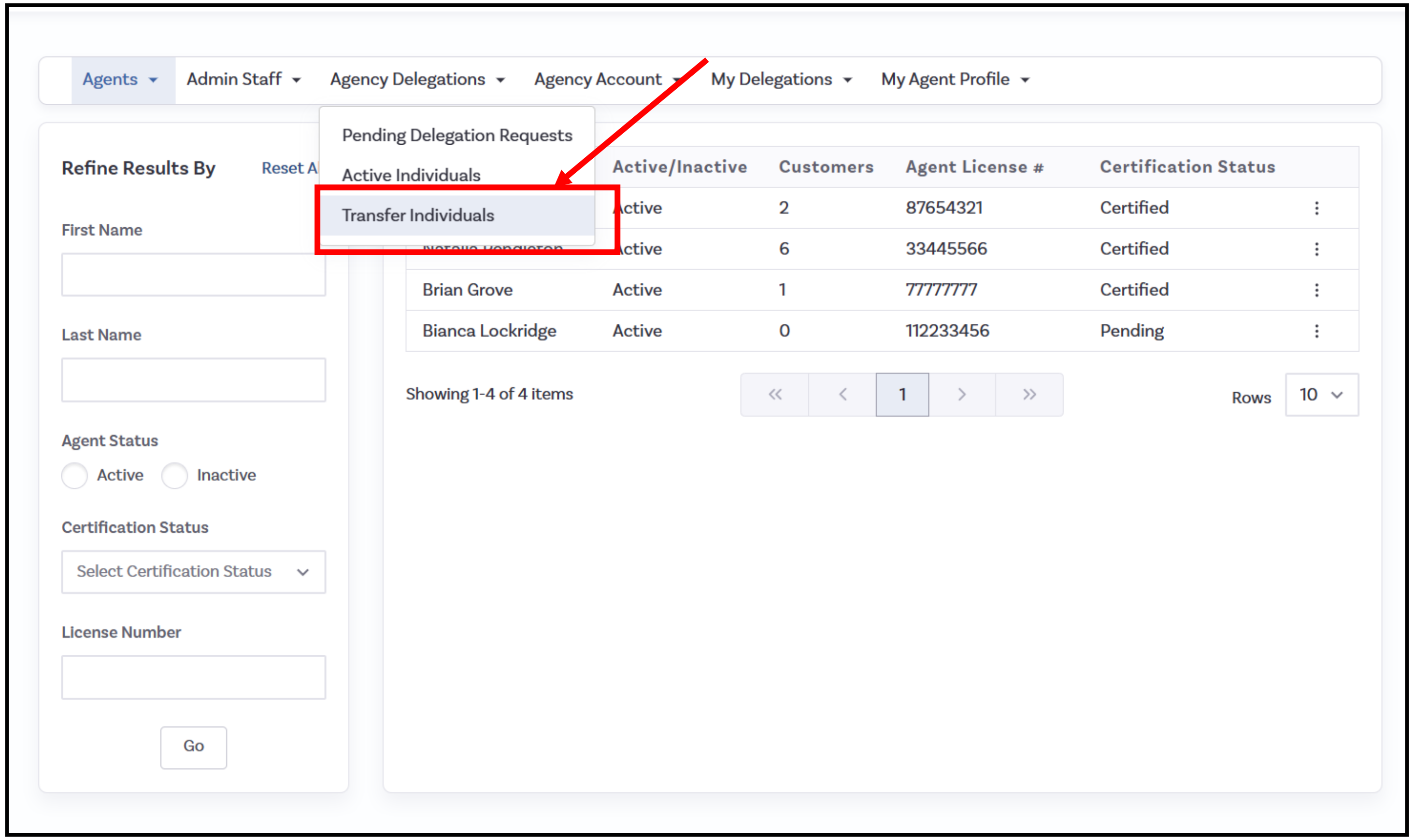
Step 7: The Agency Manager can act on behalf of customer Franklin, who is designated to agent Santiago.



Agency Manager Capabilities: Transfer Consumer from One Broker to Another

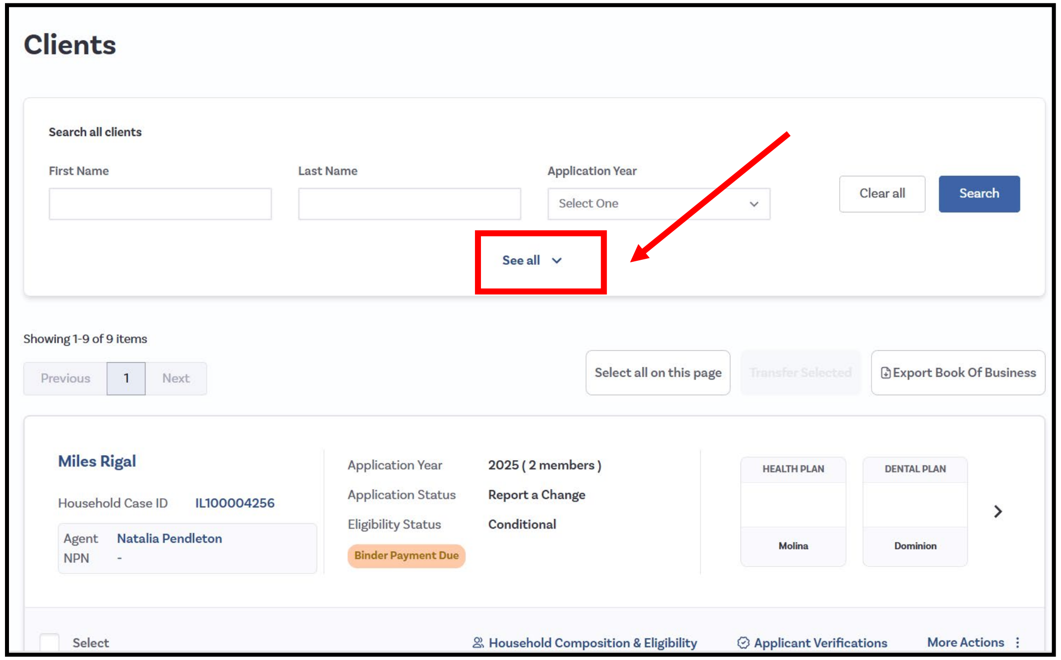
The Agency Manager can transfer a customer from one broker to a different broker within their agency. We will transfer the customer Franklin from the broker Santiago to the broker Natalia.

Step 1: The Agency Manager navigates to the "Transfer Individuals" tab under "Agency Delegations."

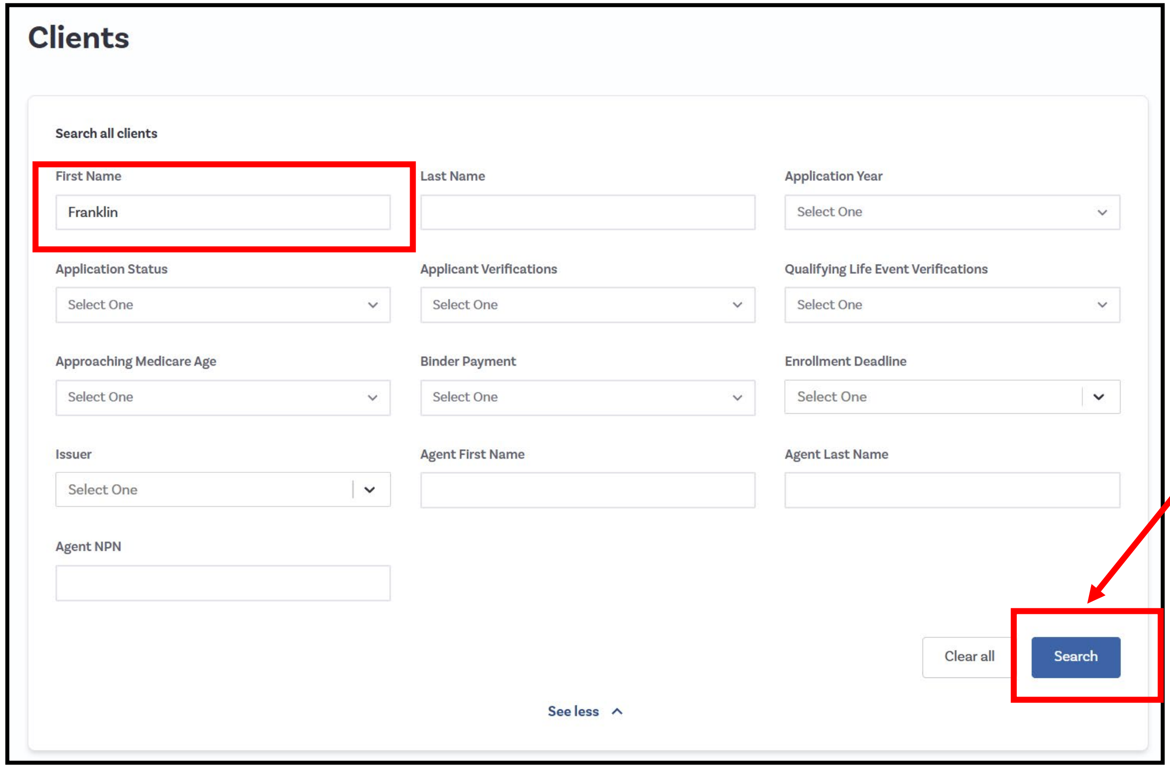


Agency Manager Capabilities: Transfer Consumer from One Broker to Another

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

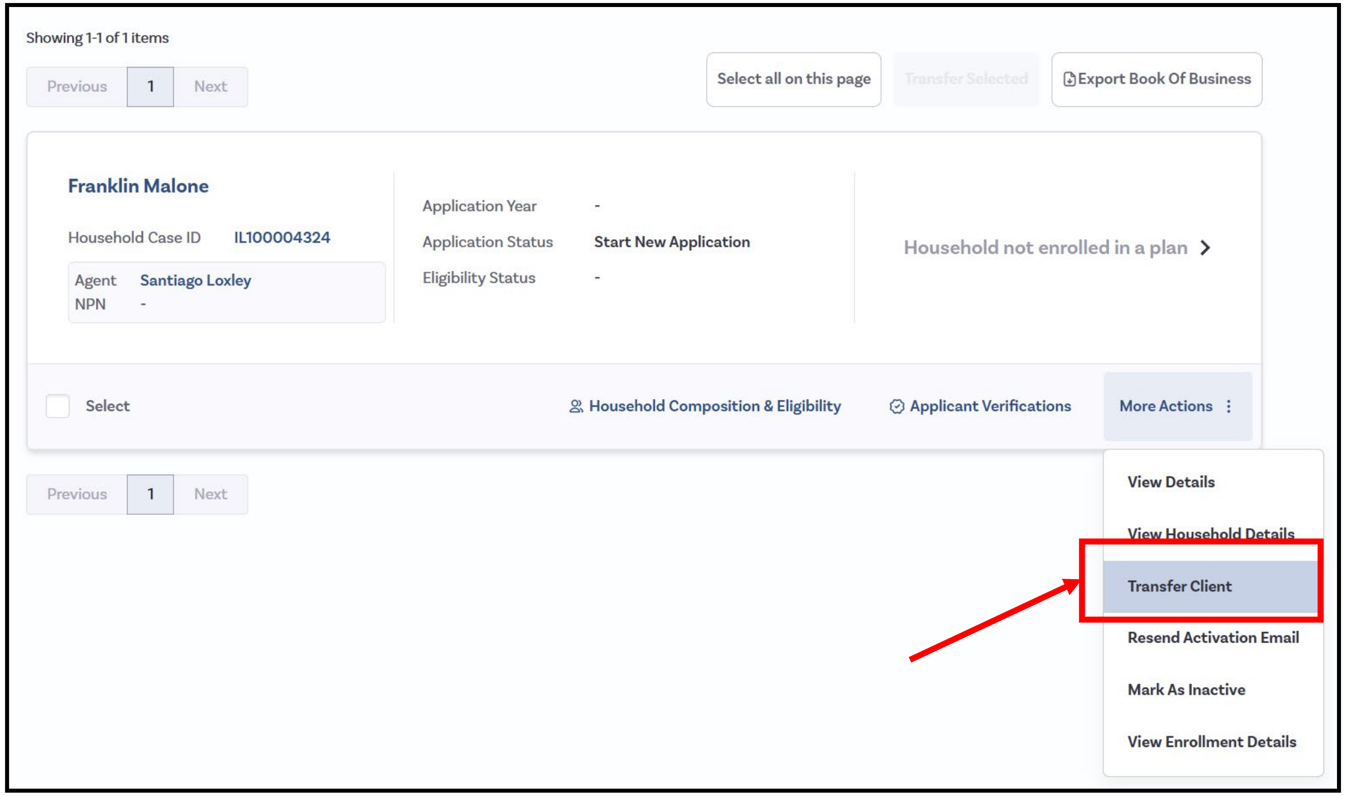


Step 3: The Agency Manager adds the first name of the customer, Franklin, and selects "Search."

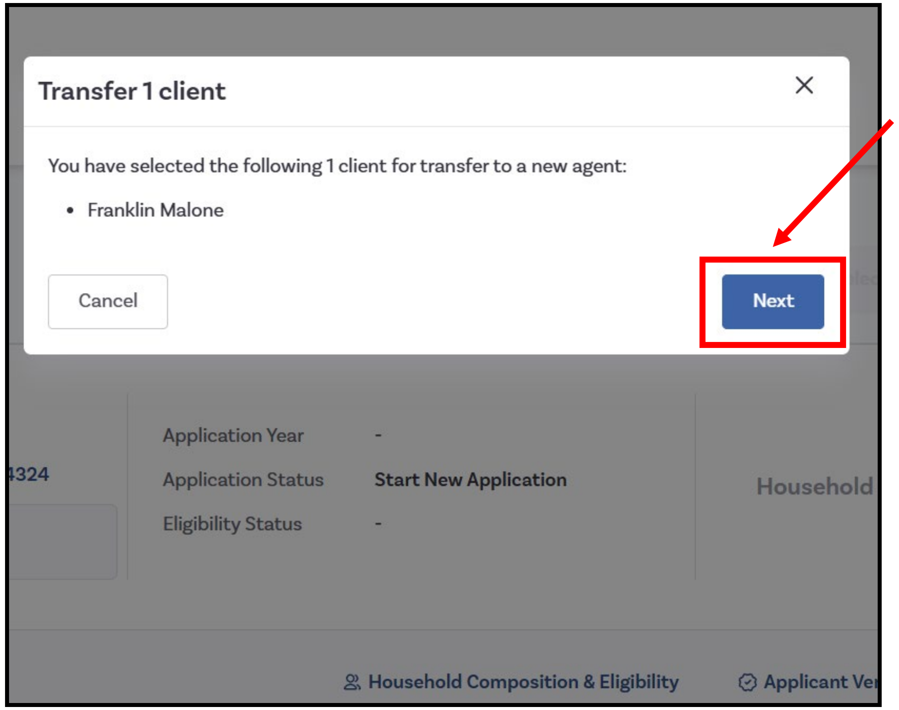


Agency Manager Capabilities: Transfer Consumer from One Broker to Another

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

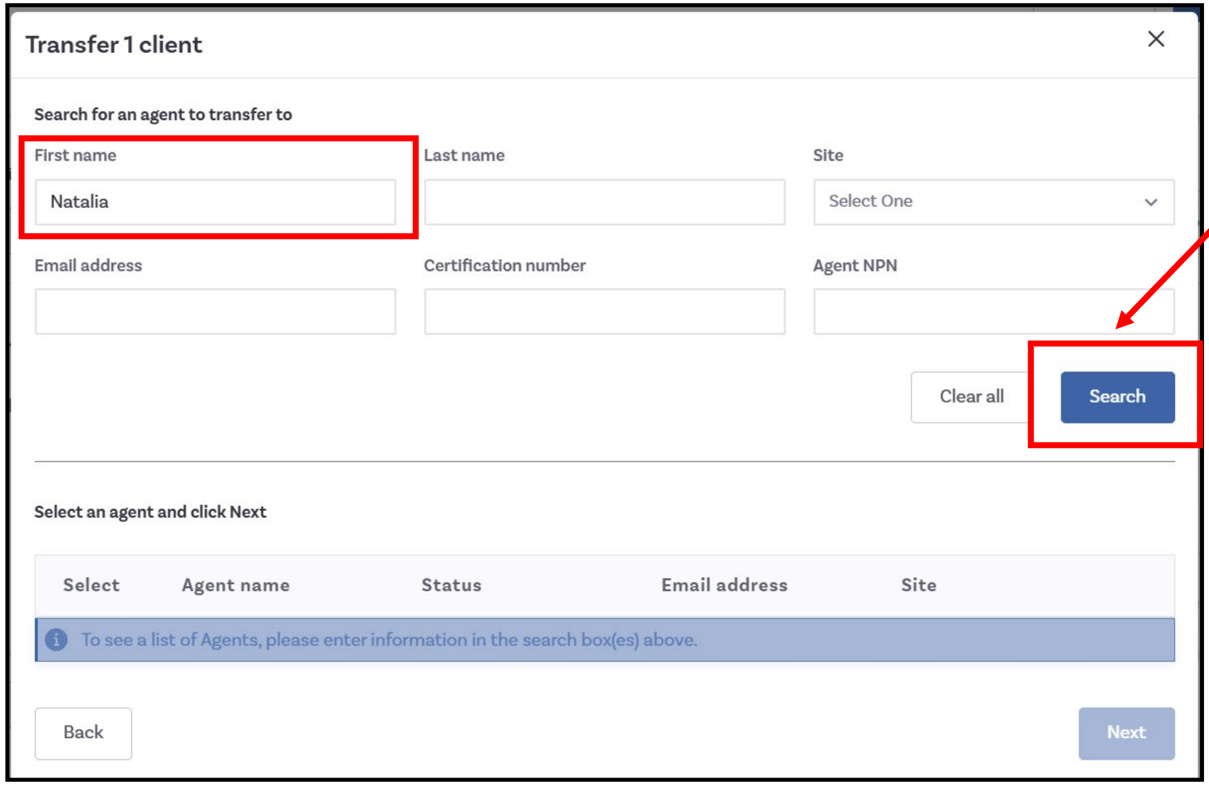


Step 5: The Agency Manager confirms the customer to transfer and selects "Next."

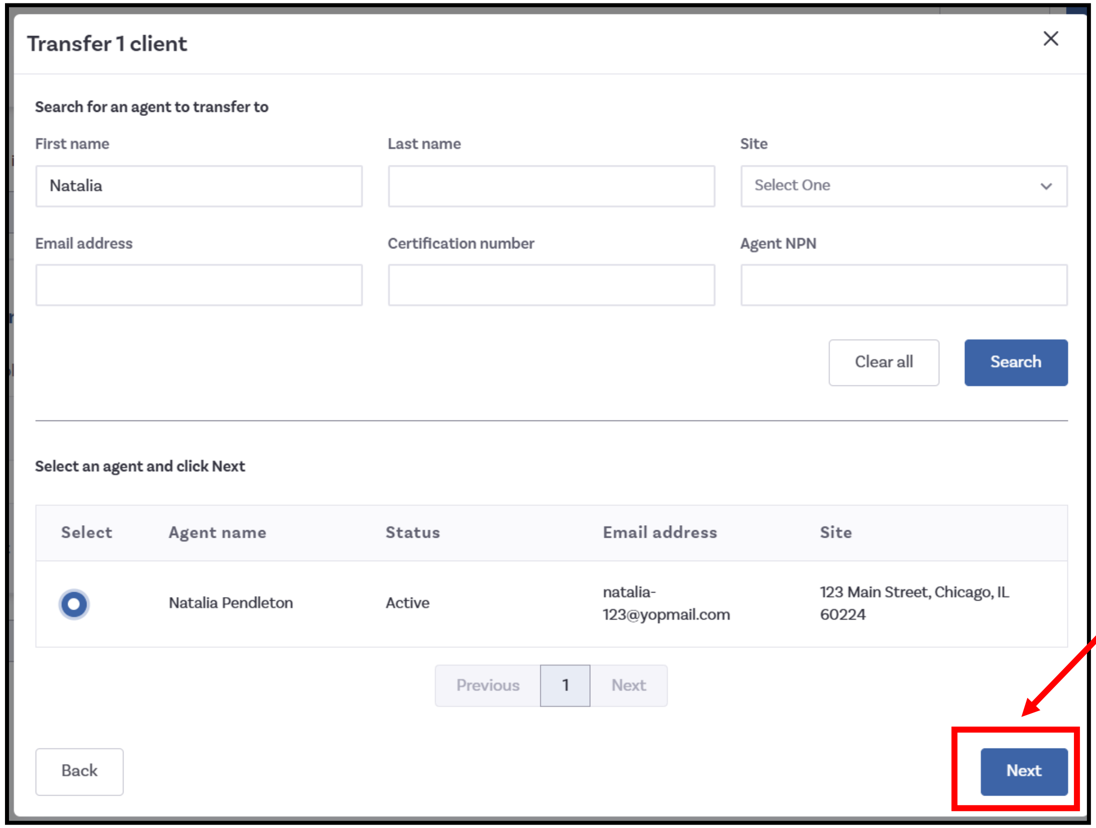


Agency Manager Capabilities: Transfer Consumer from One Broker to Another

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

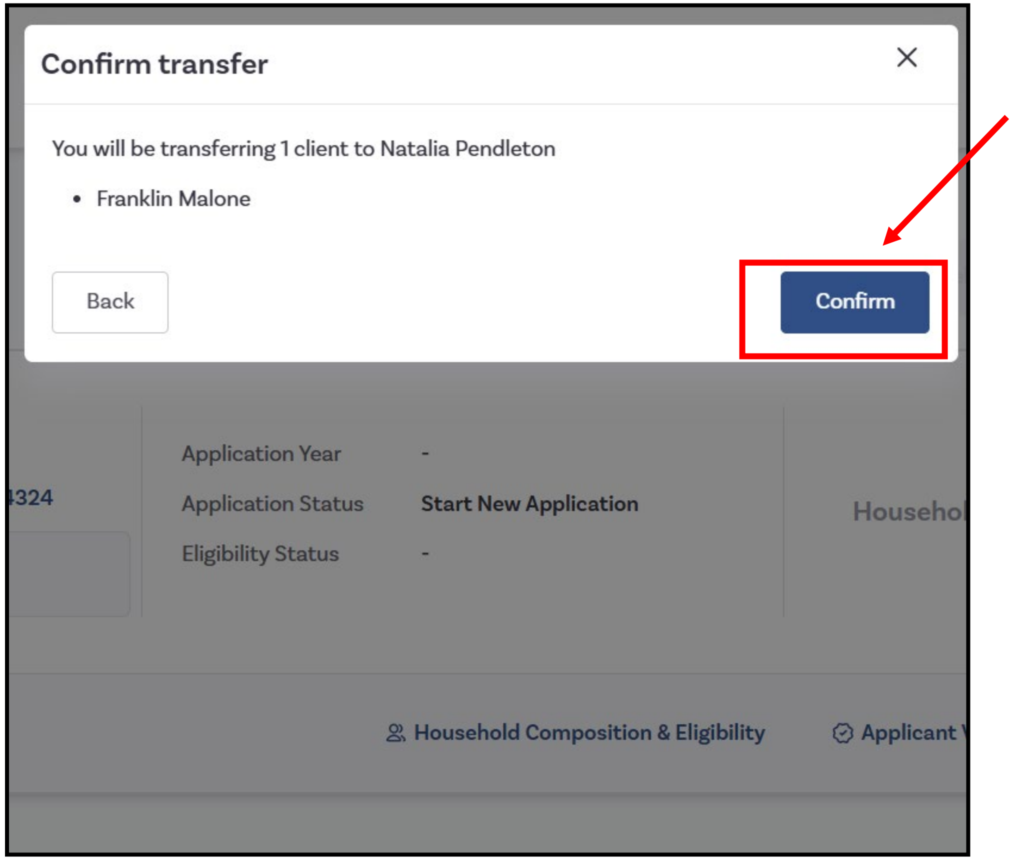


Step 7: The Agency Manager selects the Broker and clicks "Next."

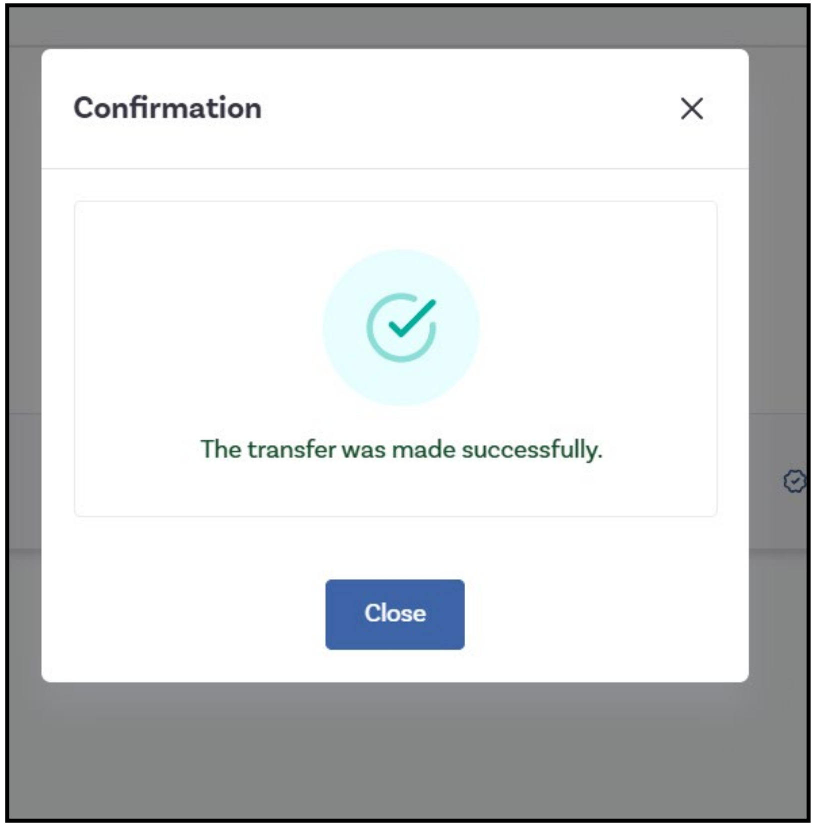


Agency Manager Capabilities: Transfer Consumer from One Broker to Another

Step 7: The Agency Manager selects "Confirm."

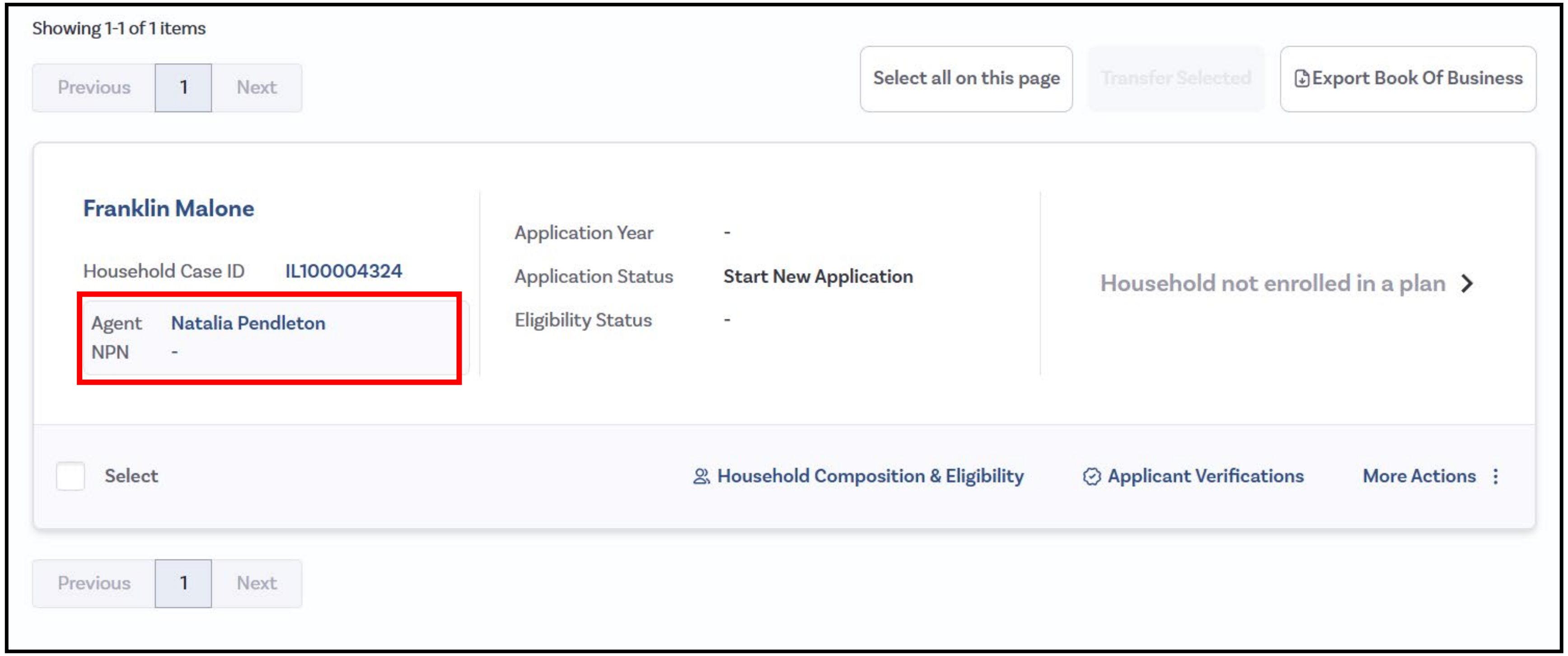


Step 8: The Agency Manager receives a successful confirmation message.



Agency Manager Capabilities: Transfer Consumer from One Broker to Another

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



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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

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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!