

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)

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).

Agenda

✓ Get Covered Illinois Broker Certification

Overview of Broker Functionality

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- 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

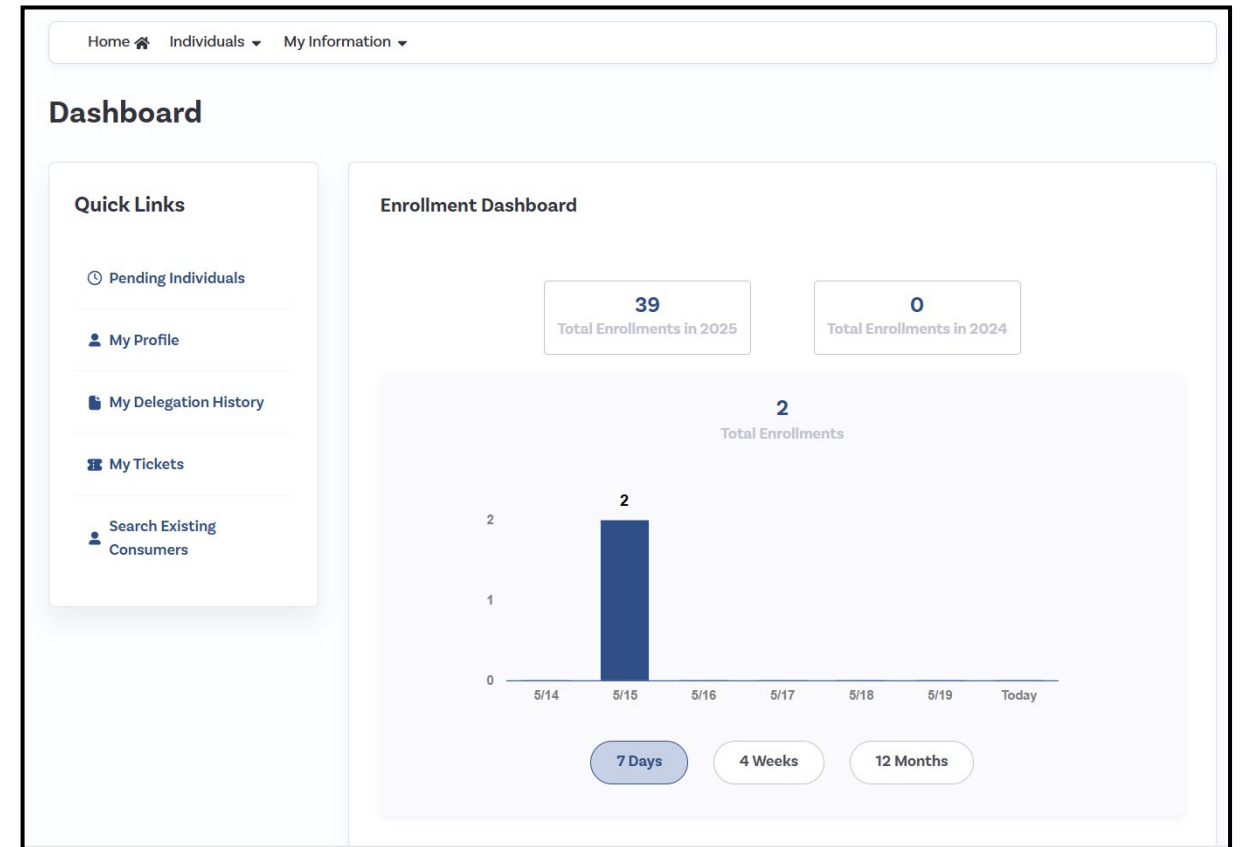
The Get Covered Illinois Broker Portal is a dedicated module optimized for Get Covered Illinois-certified brokers to provide support to their customers.

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

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

Select One

Select One

Select One

Select One

Select One

Select One

Select One

Select One

Select One

Select One

Clear all

Search

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, the 'Clients' title is followed by a search bar labeled 'Search all clients'. The search bar includes fields for 'First Name', 'Last Name', and 'Application Year' (a dropdown menu), along with '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'. It lists 'Application Year' as '2025 (2 members)', 'Application Status' as 'Report a Change', and 'Eligibility Status' as 'Conditional'. A 'Binder Payment Due' badge is visible. To the right, there are sections for 'HEALTH PLAN' (Molina) and 'DENTAL PLAN' (Dominion). At the bottom, there is a 'Select' checkbox and links for 'Household Composition & Eligibility', 'Applicant Verifications', and 'More Actions'.

Customer Designations

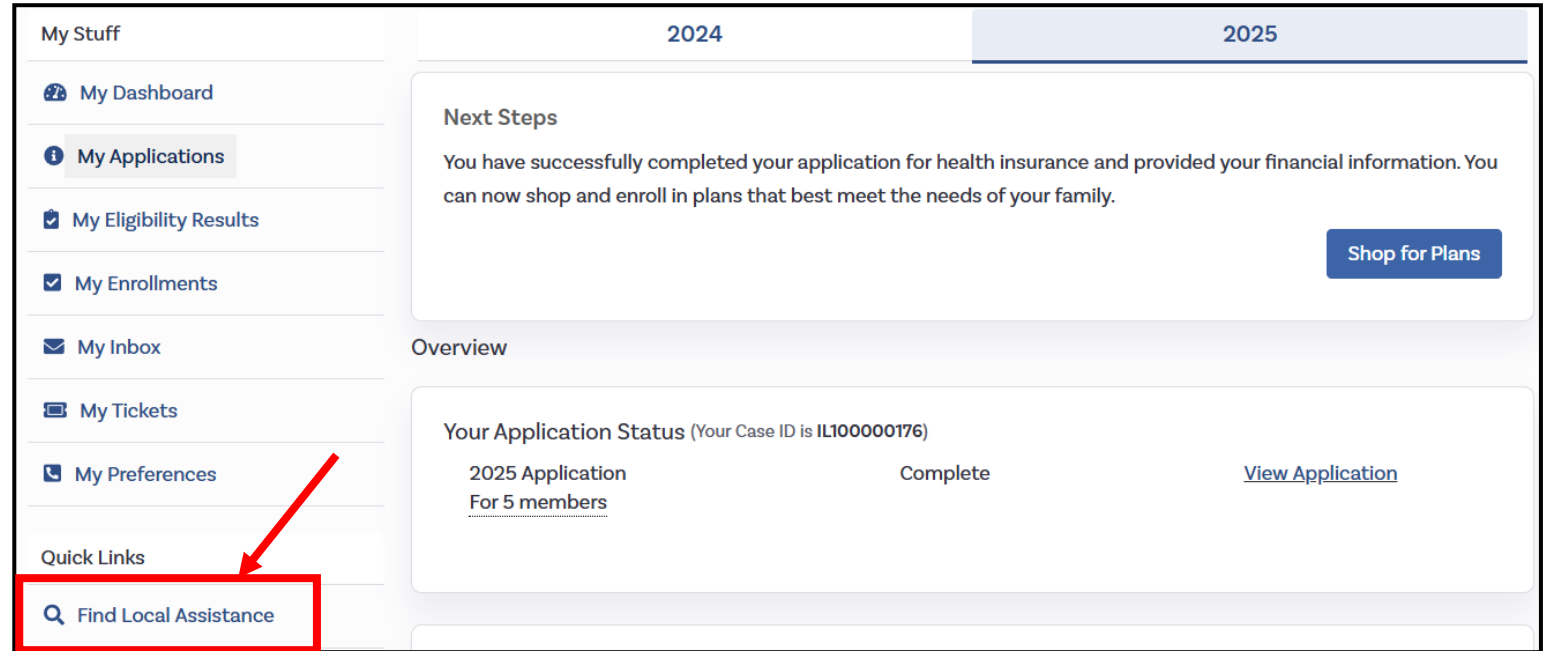
(1) Find Local Assistance in **Customer Account**

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

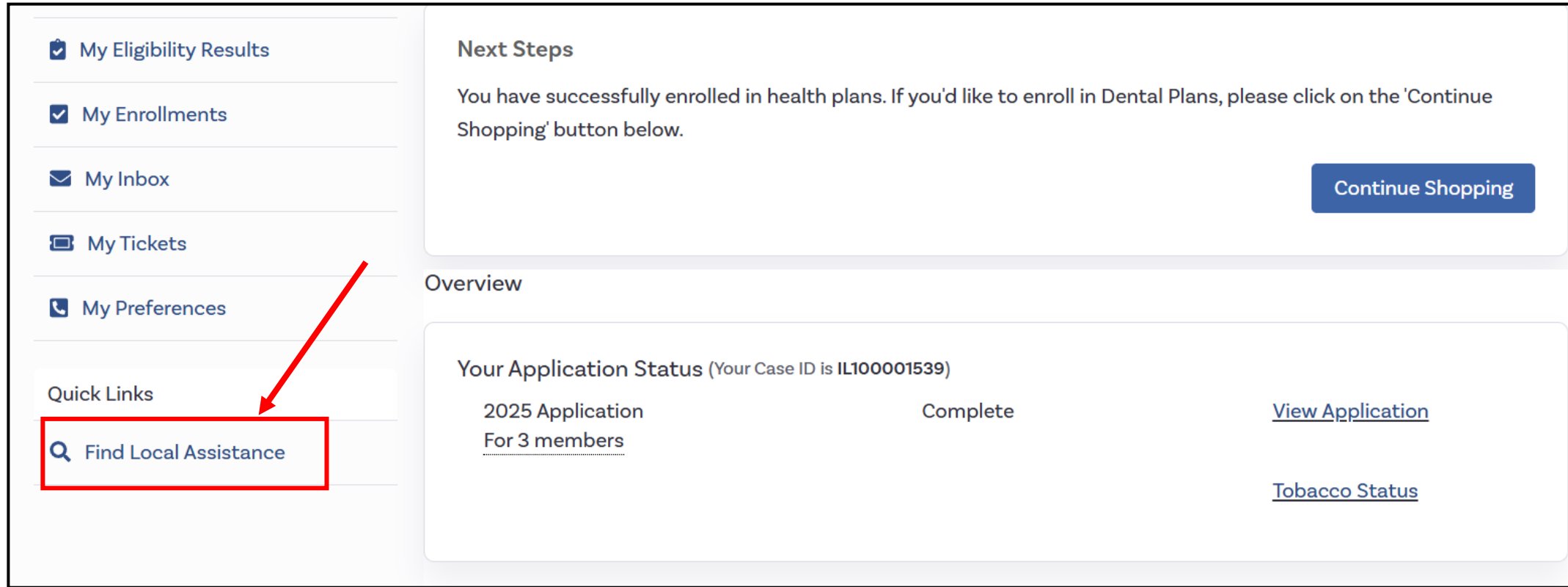
The following slides show the process that consumers can use to request a broker designation directly from their account. The high-level process is below:

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 displays the 'Get Covered Illinois' dashboard. On the left sidebar, under 'Quick Links', the 'Find Local Assistance' option is highlighted with a red rectangular box. A red arrow points from the top right towards this box. The main content area is divided into two sections. The top section, titled 'Next Steps', contains a message about enrolling in health plans and a 'Continue Shopping' button. The bottom section, titled 'Overview', displays the user's application status for the year 2025, indicating it is 'Complete' and providing links to 'View Application' and 'Tobacco Status'.

Quick Links

- My Eligibility Results
- My Enrollments
- My Inbox
- My Tickets
- My Preferences
- Find Local Assistance**

Next Steps

You have successfully enrolled in health plans. If you'd like to enroll in Dental Plans, please click on the 'Continue Shopping' button below.

[Continue Shopping](#)

Overview

Your Application Status (Your Case ID is IL100001539)

2025 Application For 3 members	Complete	View Application
		Tobacco Status

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

Search by location

Zip code *

Distance

5

miles

Languages

Select an Option

Search

OR

Search by Name

First Name

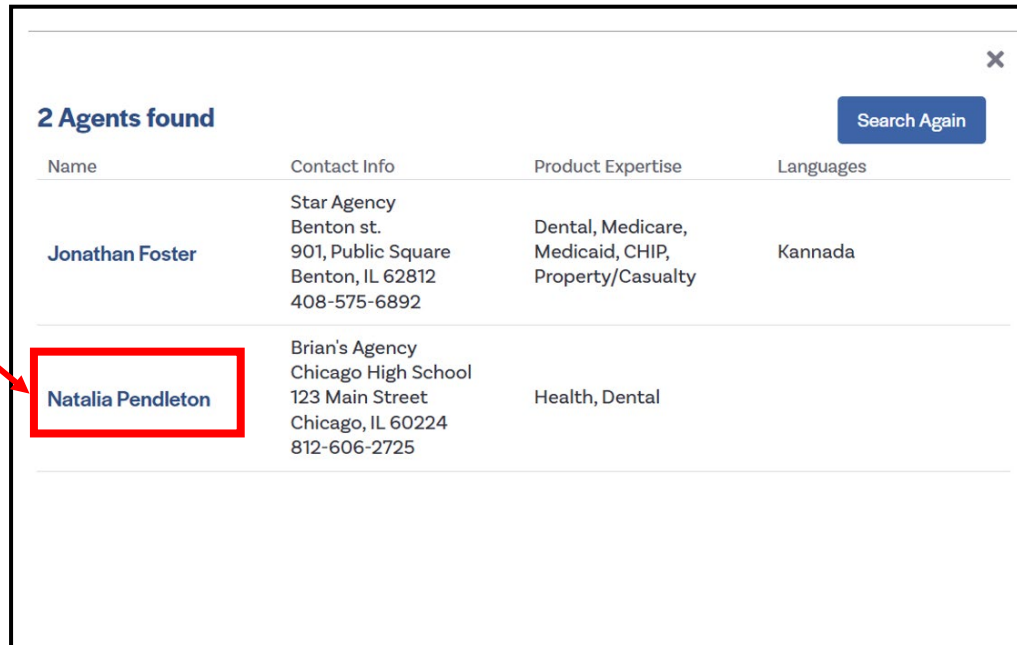
Last Name

Agency Name

Search

Detailed Walkthrough: Find Local Assistance Tool

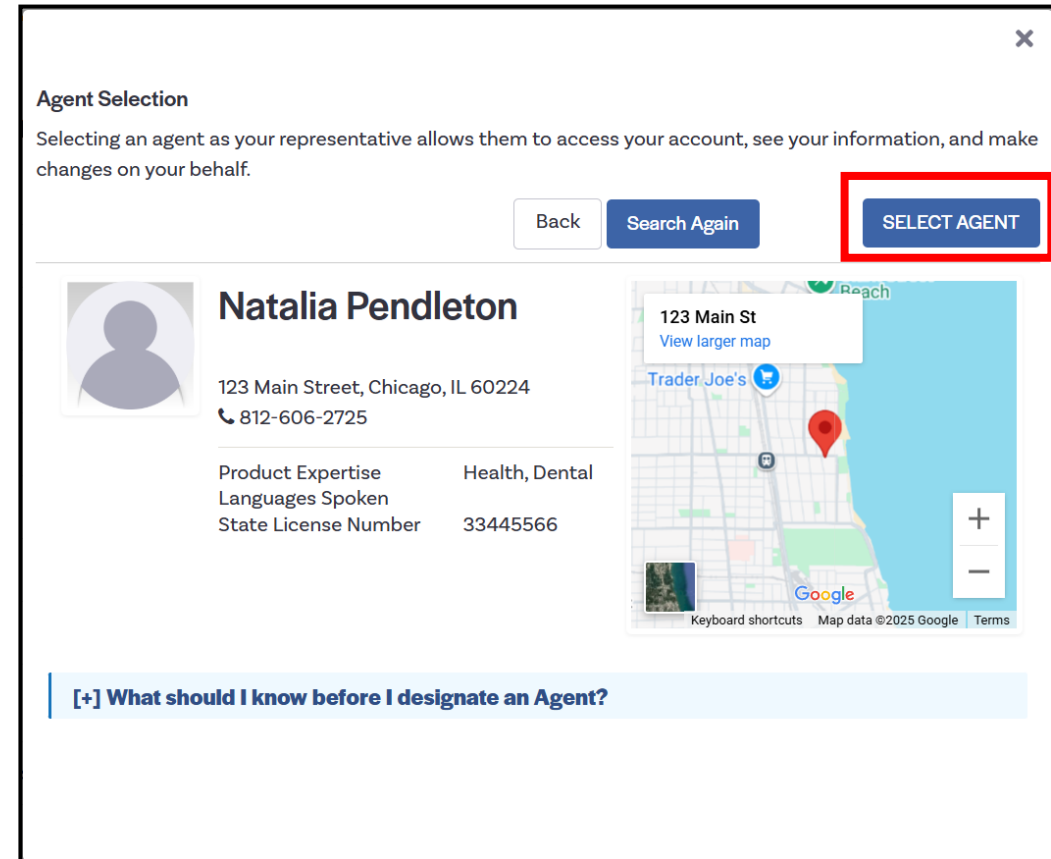
Step 4: Consumers select the name of the broker that they would like to work with.



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: [blank]
State License Number: 33445566

123 Main St
[View larger map](#)

Trader Joe's

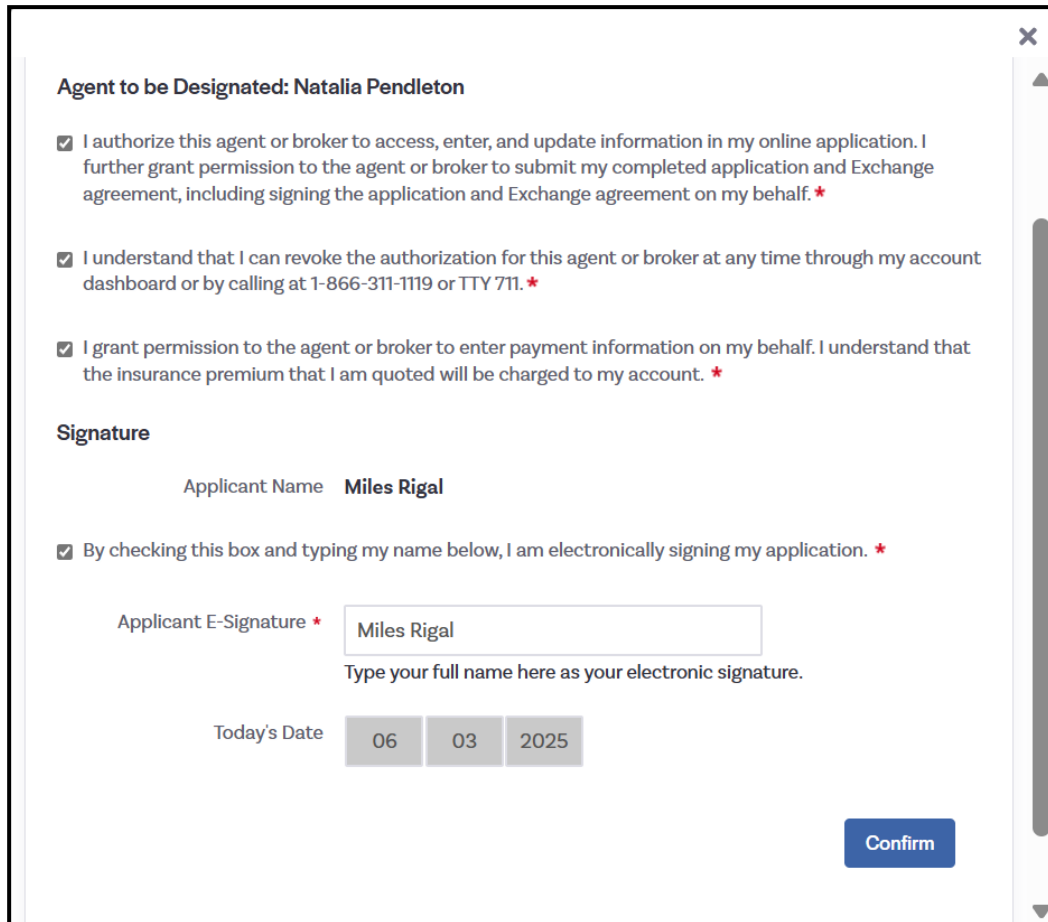


Keyboard shortcuts Map data ©2025 Google Terms

[\[+\] What should I know before I designate an Agent?](#)

Detailed Walkthrough: Find Local Assistance Tool

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



This screenshot shows a confirmation screen for designating an agent. At the top, it says "Agent to be Designated: Natalia Pendleton". Below this are three checked checkboxes with their respective terms: 1) Authorizing the agent to access and update application information. 2) Understanding that authorization can be revoked at any time. 3) Granting permission for the agent to enter payment information. Below the checkboxes is a "Signature" section. It shows the "Applicant Name" as "Miles Rigal". There is a checked checkbox stating that by checking the box and typing the name, the user is electronically signing the application. Below this is a text input field for the "Applicant E-Signature" containing the text "Miles Rigal", with a prompt to "Type your full name here as your electronic signature." Below the signature field is a date selector for "Today's Date" showing "06", "03", and "2025". A blue "Confirm" button is located at the bottom right of the form.

Agent to be Designated: Natalia Pendleton

- ☒ 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**

☒ By checking this box and typing my name below, I am electronically signing my application. *

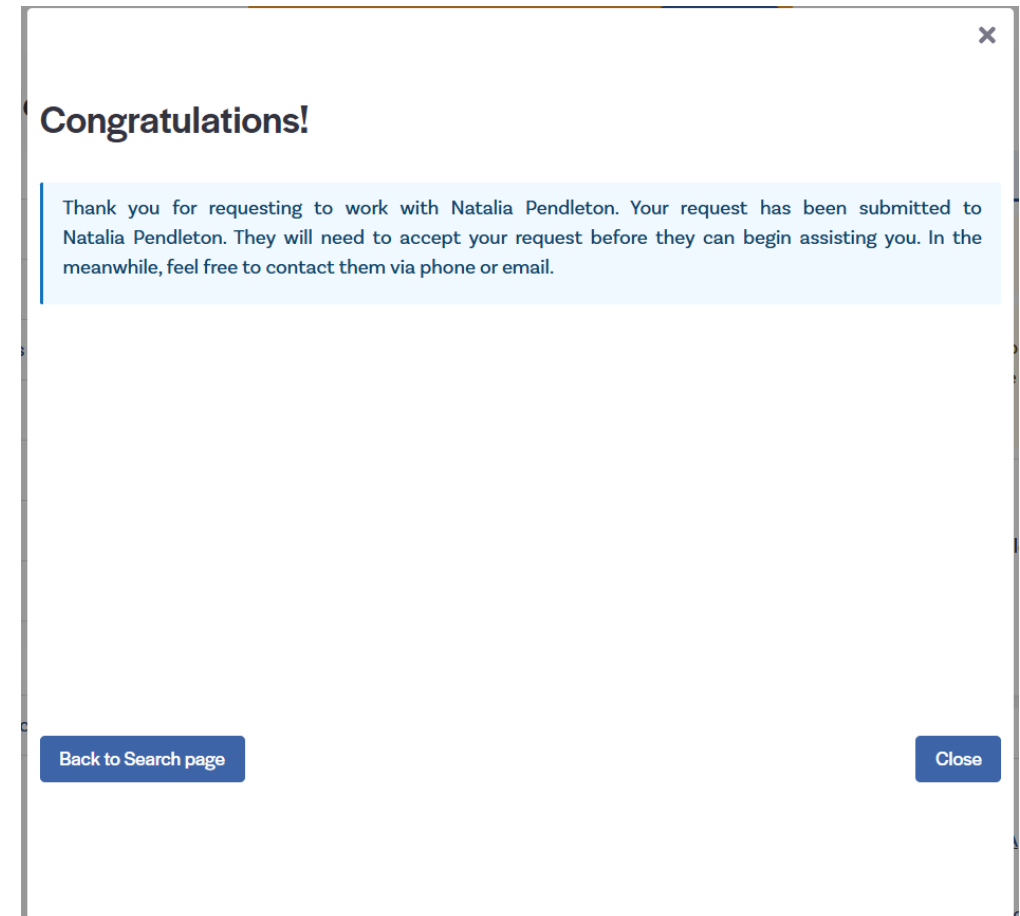
Applicant E-Signature *

Type your full name here as your electronic signature.

Today's Date

[Confirm](#)

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



This screenshot shows a success message. At the top, it says "Congratulations!". Below this is a light blue box containing the text: "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." At the bottom of the screen, there are two blue buttons: "Back to Search page" on the left and "Close" on the right.

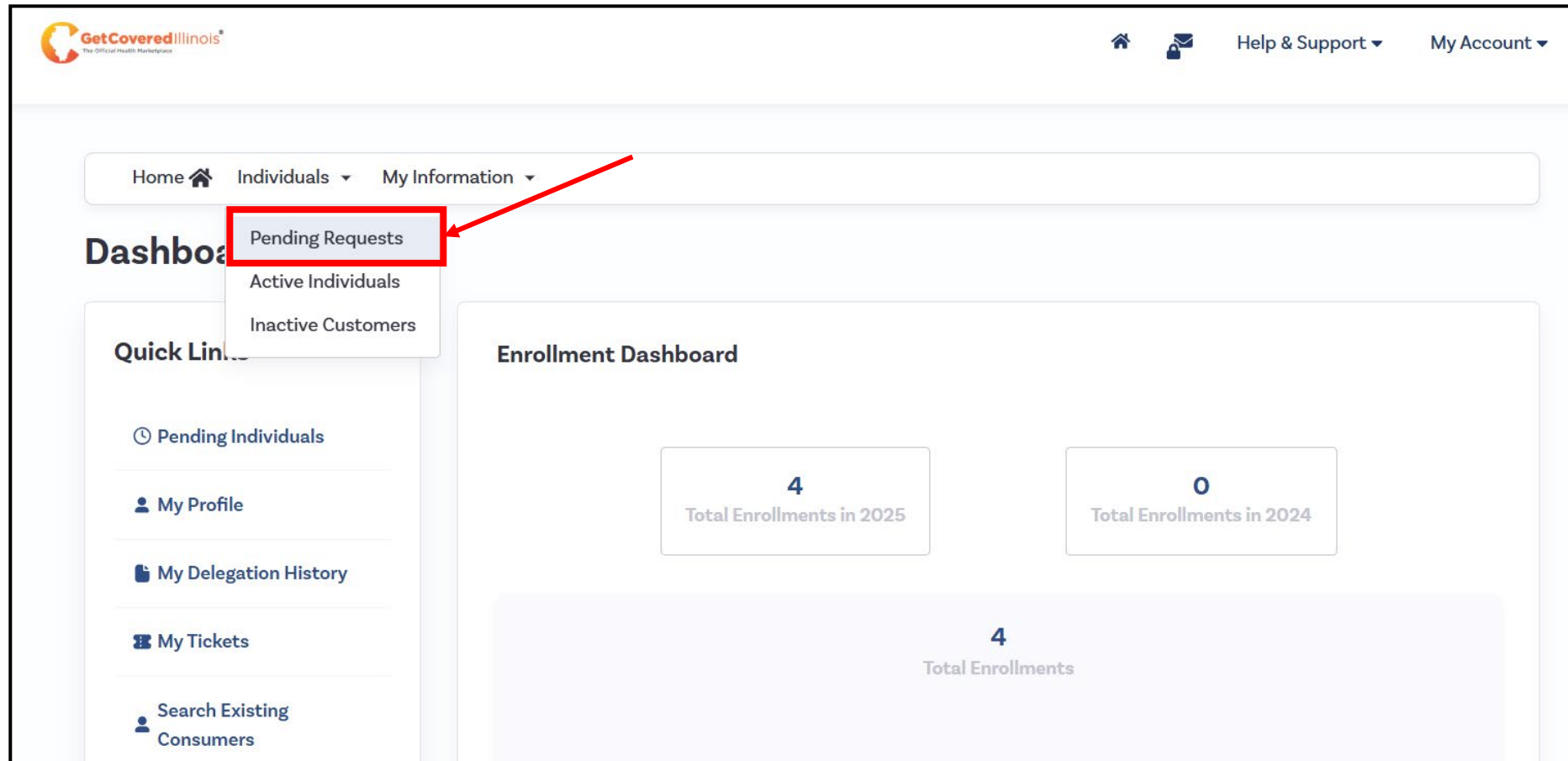
Congratulations!

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.

The screenshot shows a web application interface for managing individuals. At the top, there are navigation tabs: 'Home', 'Individuals', and 'My Information'. Below the tabs, the main heading is 'Pending Individuals' with a subtext '1 Pending Individual'. On the left side, there is a 'Refine Results By' section with a '(Reset all)' link. It includes input fields for 'First Name' and 'Last Name', and a 'Request Sent' section with 'From:' and 'To:' date pickers (format mm/dd/yyyy) and a 'Go' button. The main area displays a table with the following data:

Name	Family Size	Request Sent	
Miles Rigal	2	06/03/2025	Accept Decline

The 'Accept' button in the table is highlighted with a red box, and a red arrow points to it from the right.

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

Select One

Clear all

Search

See all

Showing 1-6 of 6 items

Previous

1

Next

Select all on this page

Export Book Of Business

Miles Rival Household Case ID IL100004256	Application Year2025 (2 members) Application StatusReport a Change Eligibility StatusConditional Binder Payment Due	HEALTH PLAN DENTAL PLAN Molina Dominion
--	---	---

☐ 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.

[Back to Dashboard](#)

Notifications

Search

Q

Folders

Inbox 1

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

1

Detailed Walkthrough: View Member Account

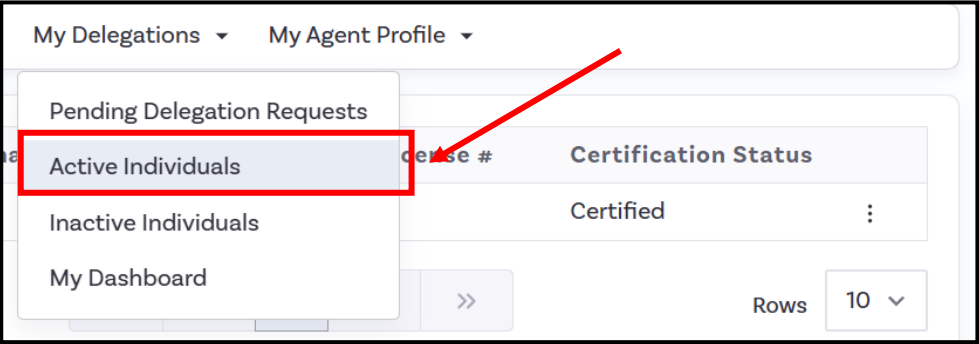
After a consumer is affiliated with a broker, the broker can view their account and act on behalf of them. The following slides show how brokers can access their account. The high-level process is below:

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.

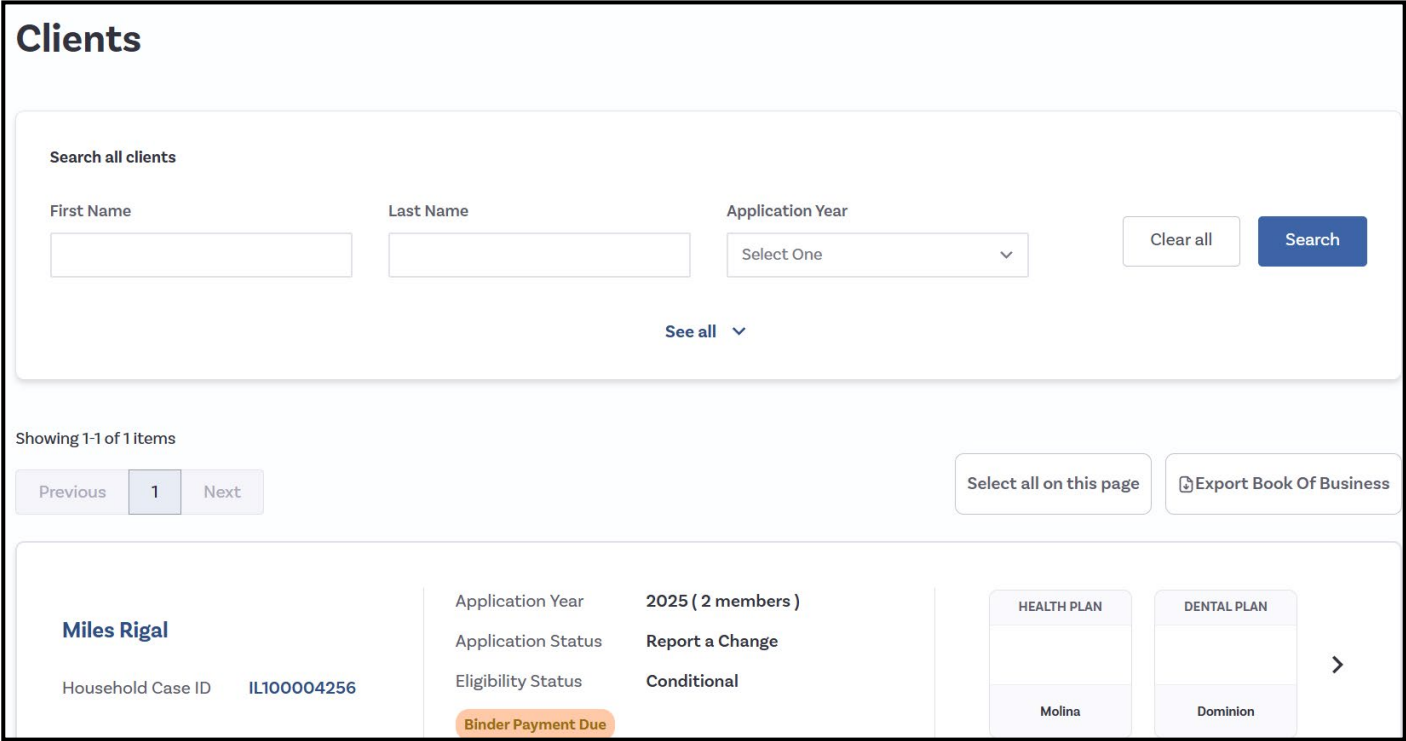
NOTE: The slides are from a test environment and do not reflect Get Covered Illinois’ finalized language/content that will be displayed in the portal. All information shown is mock data (no real PII).

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 Year2025 (2 members)

Application StatusReport a Change

Eligibility StatusConditional

Binder Payment Due

HEALTH PLAN

DENTAL PLAN

Molina

Dominion

>

☐ Select

Household Composition & Eligibility Applicant Verifications More Actions

Previous 1 Next

View Details

View Household Details

Resend Activation Email

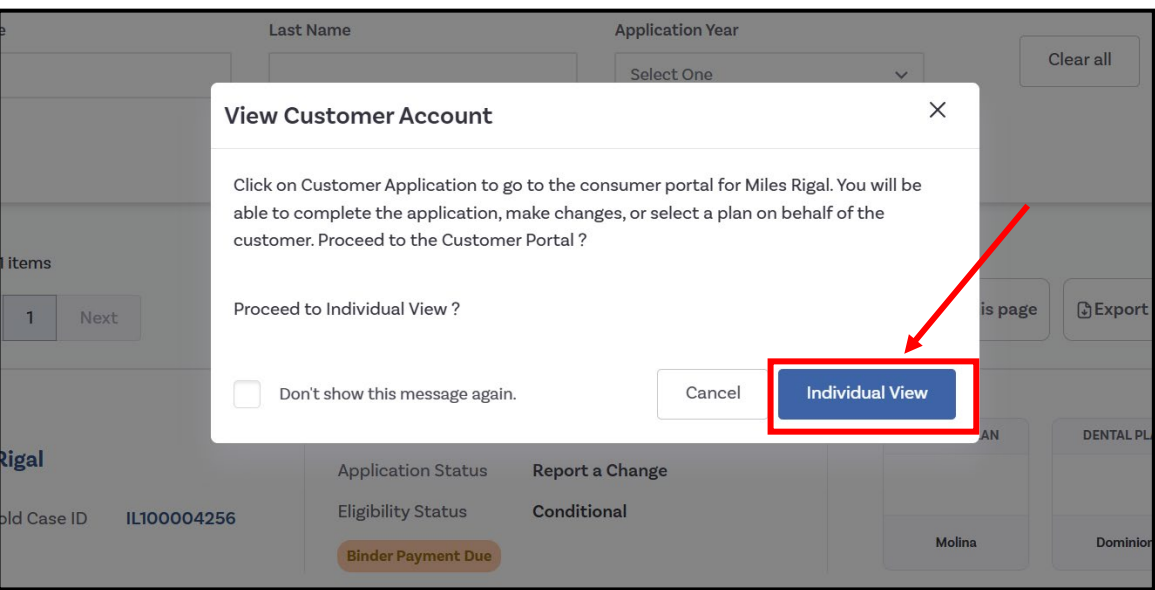
Mark As Inactive

View Enrollment Details

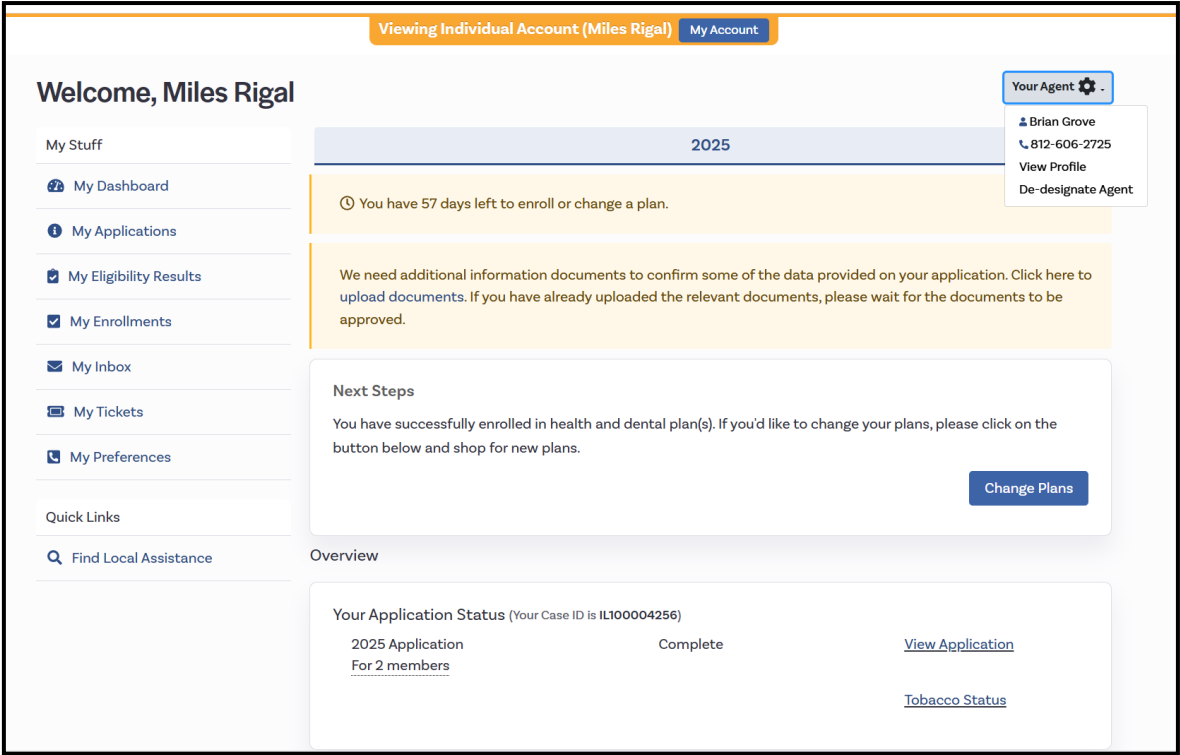
Submit New Ticket

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

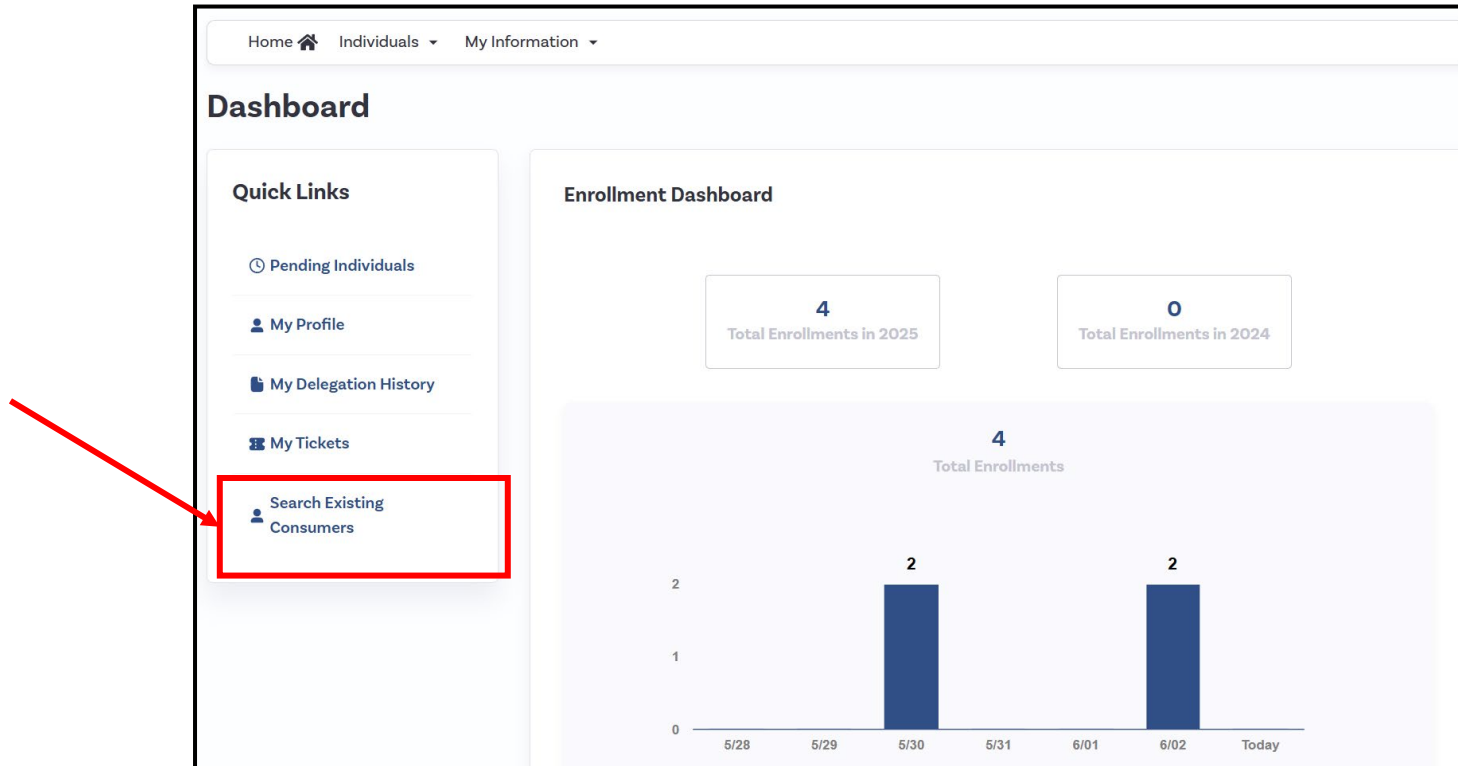
The following slides show how can use the “Search for Existing Customer” tool to designate themselves to an existing customer or create a new account if the customer does not have one. The high-level process is below:

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 *
		MM/DD/YYYY
Document Type *	Document Number *	Method *
Select ▼		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.”

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



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

Fetch Existing Consumer

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



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 *

444-55-6789

Date of Birth *

08/07/1997

Search

Muffet Sterling

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

Cancel

Claim Consumer

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?

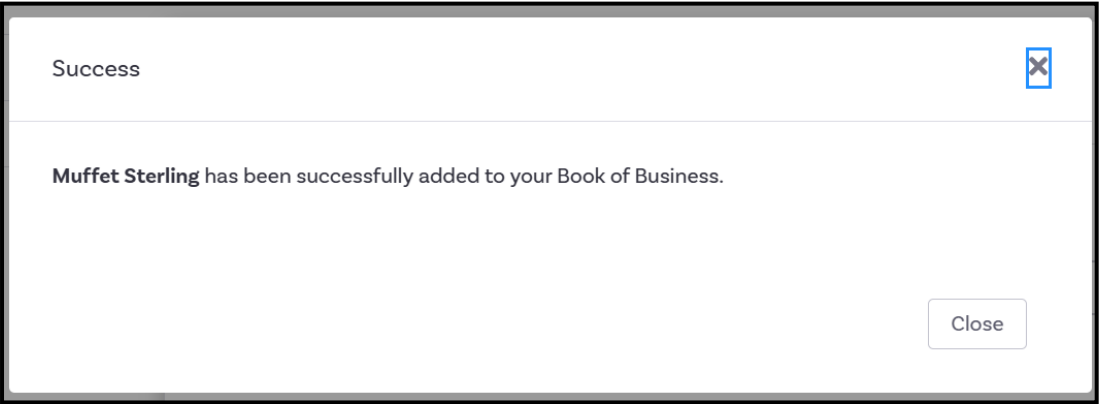
If you click "Yes," **Muffet Sterling** will be added to your Book of Business. You can then access the consumer's applications and other details to help them with enrollment.

Cancel

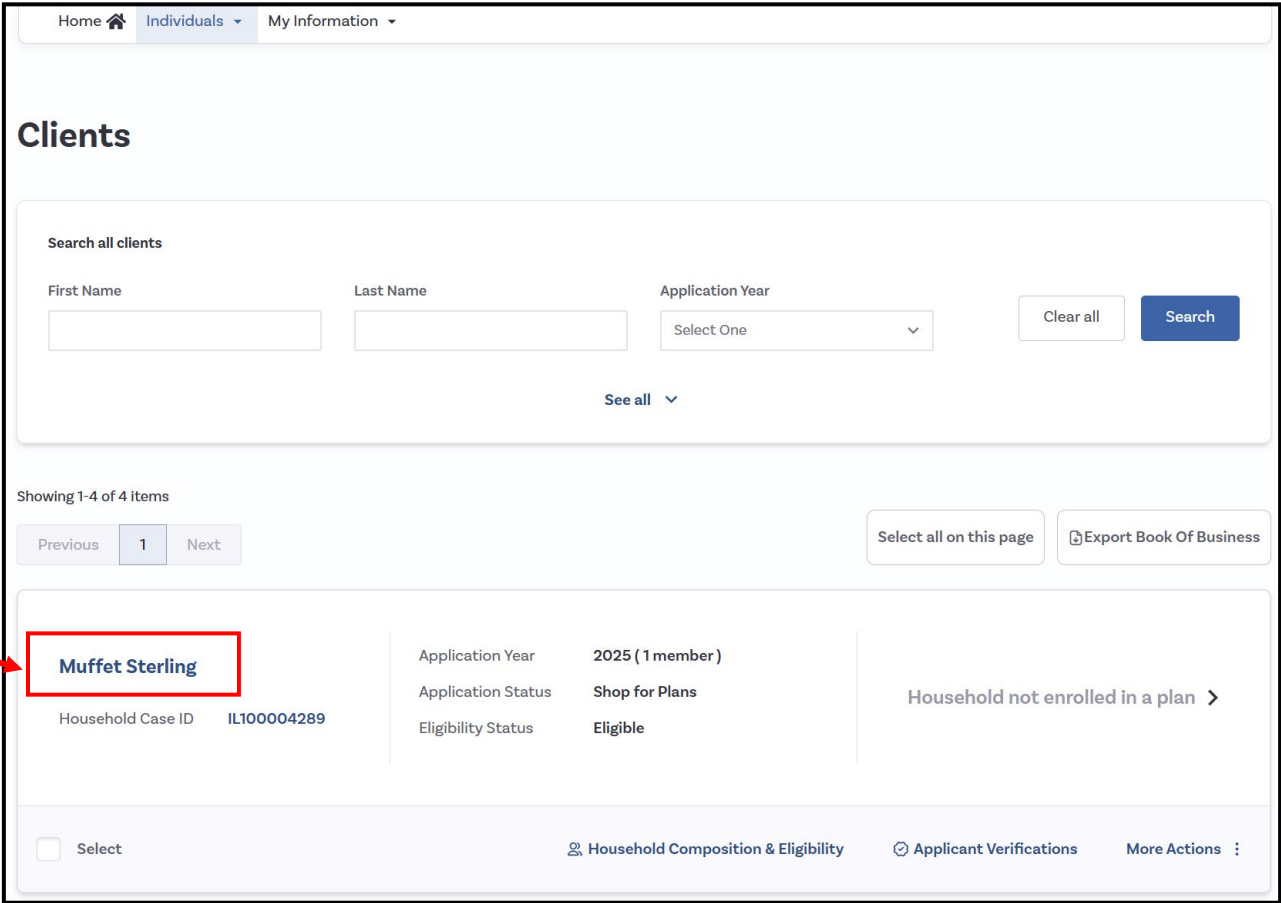
Yes

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

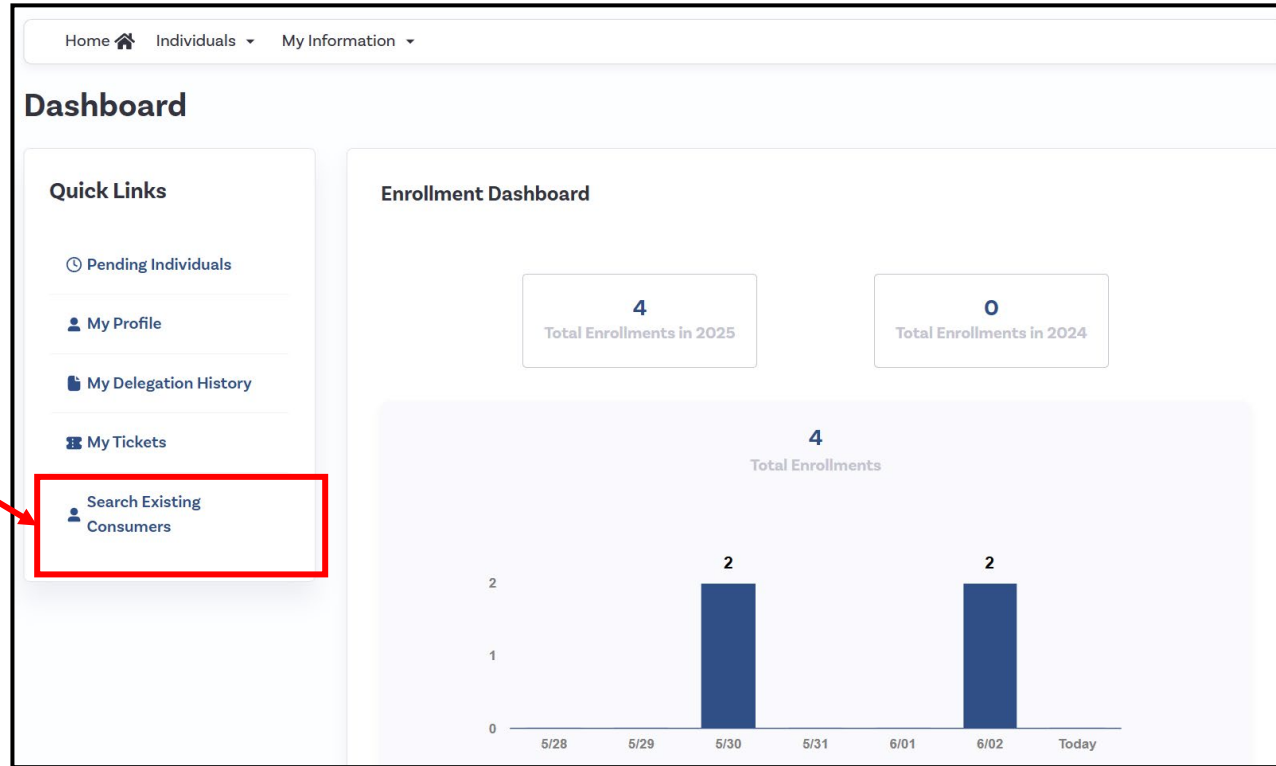
If a broker needs to create an account for a customer that does not yet have one, the broker will start with the “Search for Existing Consumer” flow to ensure that the customer has not created an account. If the customer does not have an account, the broker will be prompted to create one.

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).

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 *	Document Number *	Method *
Select		Select

Continue

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 *
Blair	Zanderson	03/19/1986
Document Type *	Document Number *	Method *
Driver's License issued by state	4444444444	In Person

Continue

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

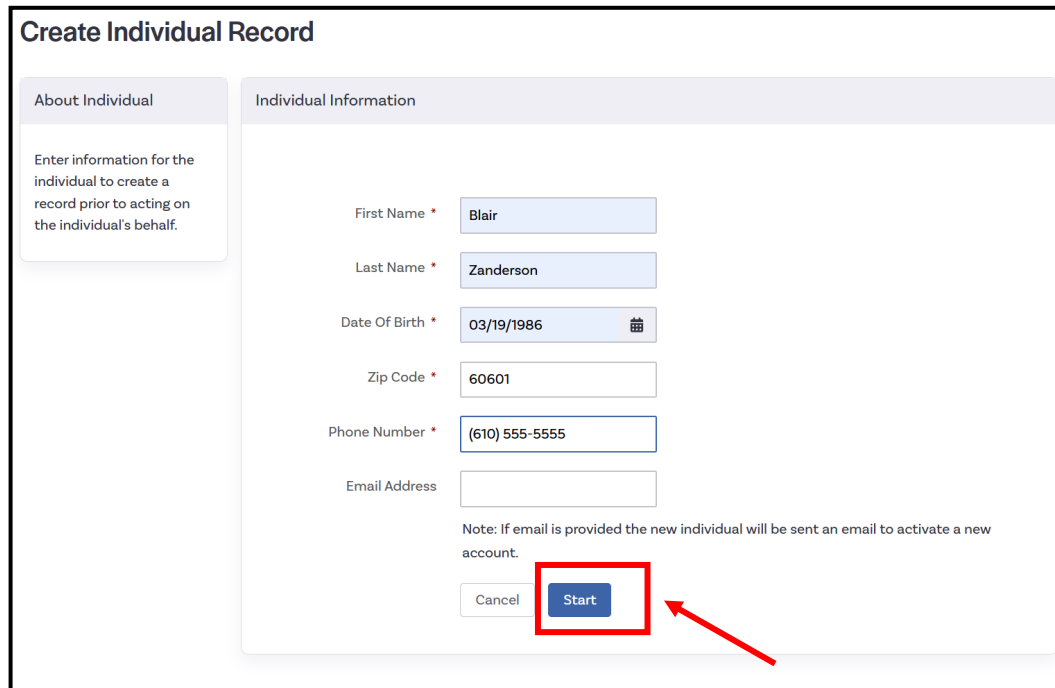
No match found

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

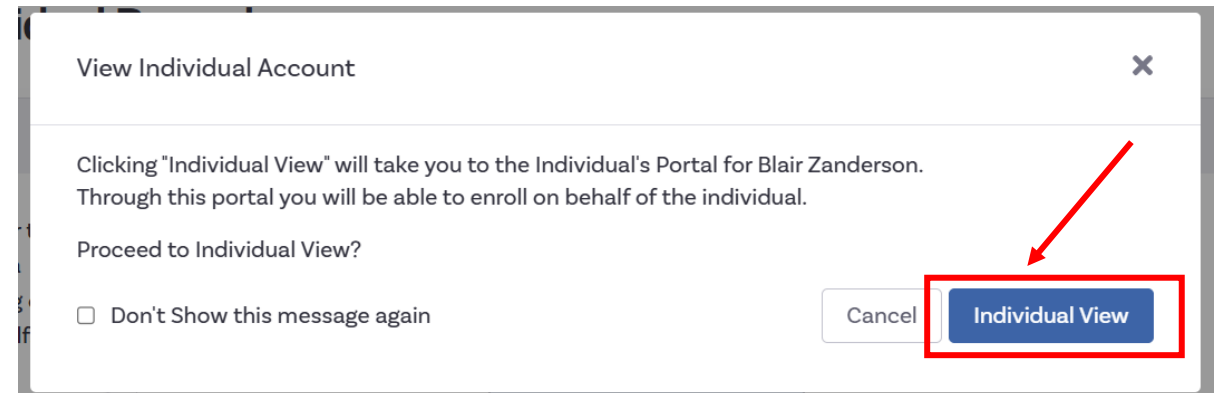
Detailed Walkthrough: Search for Existing Customer

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



The screenshot shows the 'Create Individual Record' form. On the left is a sidebar with 'About Individual' and instructions. The main area is titled 'Individual Information' and contains several input fields: First Name (Blair), Last Name (Zanderson), Date Of Birth (03/19/1986), Zip Code (60601), Phone Number ((610) 555-5555), and Email Address. At the bottom, there is a 'Note' about email activation and two buttons: 'Cancel' and 'Start'. A red box highlights the 'Start' button, with a red arrow pointing to it from the bottom right.

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

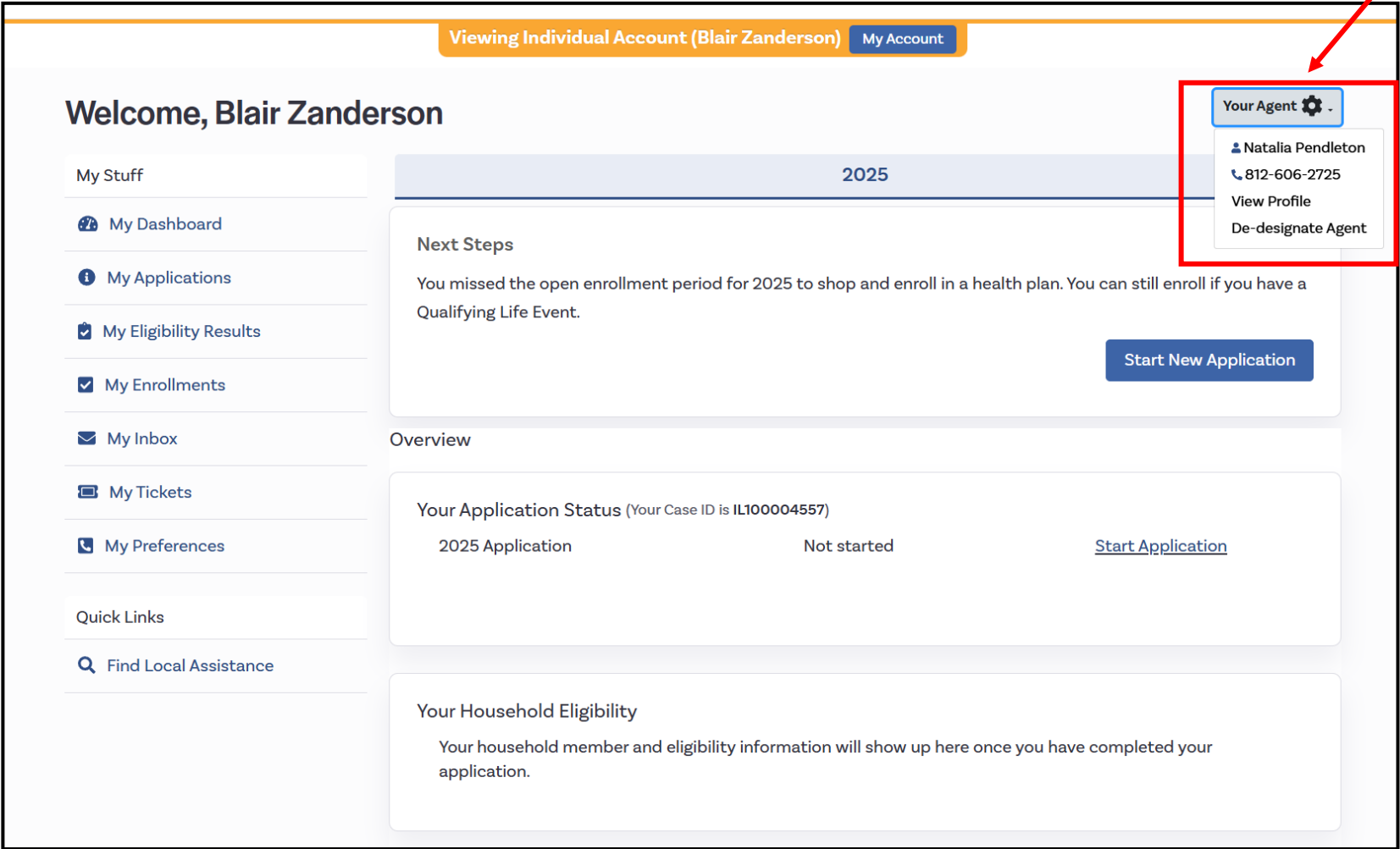


The screenshot shows a 'View Individual Account' dialog box. It contains a message: 'Clicking "Individual View" will take you to the Individual's Portal for Blair Zanderson. Through this portal you will be able to enroll on behalf of the individual.' Below this is the question 'Proceed to Individual View?' followed by a checkbox labeled 'Don't Show this message again'. At the bottom right are two buttons: 'Cancel' and 'Individual View'. A red box highlights the 'Individual View' button, with a red arrow pointing to it from the top right.

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.



Agenda

✓ Get Covered Illinois Broker Certification

Overview of Broker Functionality

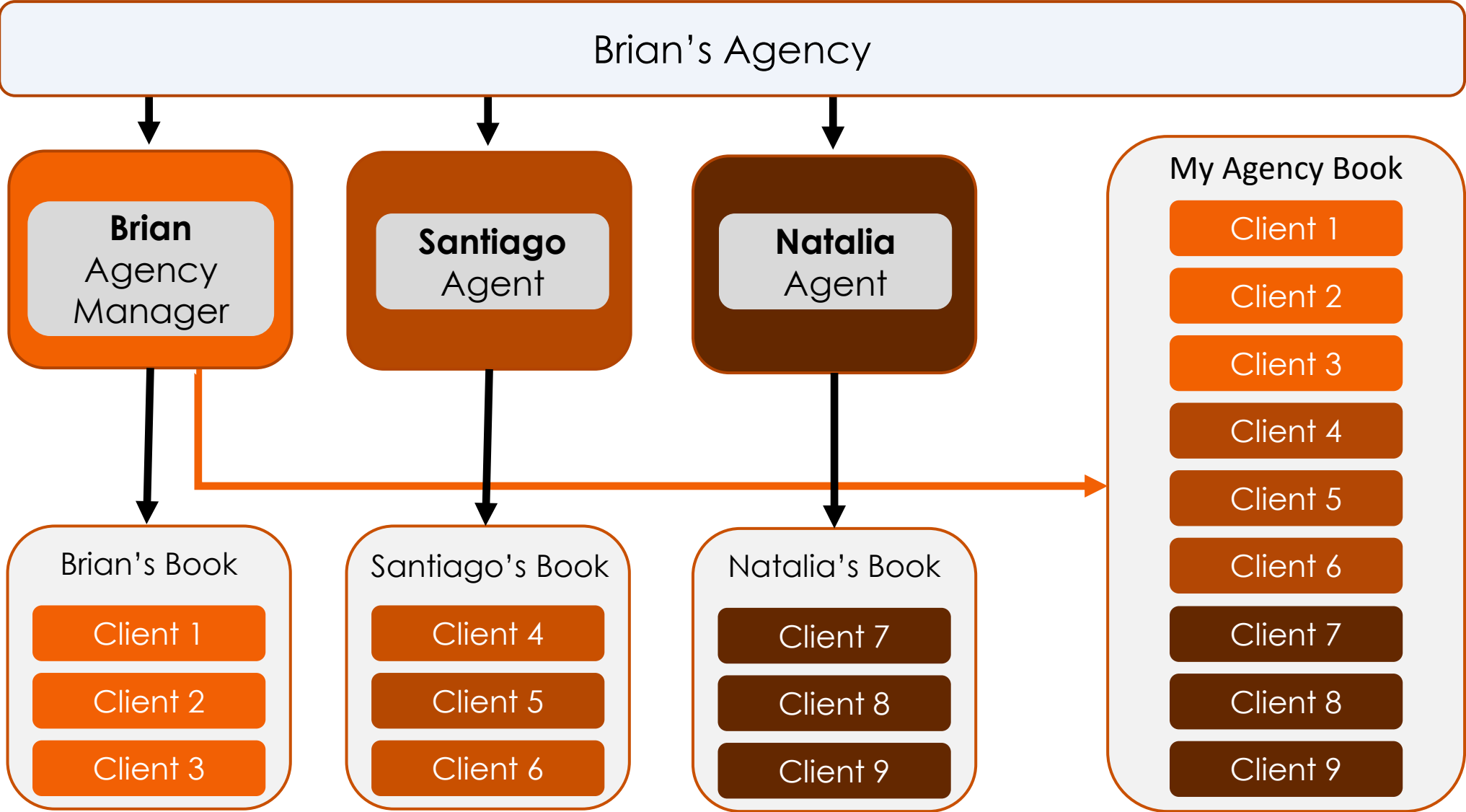
- ✓ • **Broker Portal**
 - ✓ • Managing Book of Business
 - ✓ • View Member Account
 - ✓ • Customer Designations
- **Agency Portal**
 - Manage Agency Book of Business
 - Accept Customer Designations
 - View Member Account
 - Transfer Customer within Agency

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 <u>all brokers</u> in their Agency • Take action on behalf of designated customers for <u>all brokers</u> in their Agency • Add/Remove brokers from their Agency • Monitor certification status of all brokers in their Agency

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

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

Refine Results By Reset All

First Name

Last Name

Agent Status

☐ Active ☐ Inactive

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 ⋮

Showing 1-4 of 4 items

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Rows 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.



Home

My Account

Agents

Admin Staff

Agency Delegations

Agency Account

My Delegations

My Agent Profile

Refine Results By

Reset All

First Name

Last Name

Agent Status

Certification Status

License Number

Go

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

Showing 1-4 of 4 items

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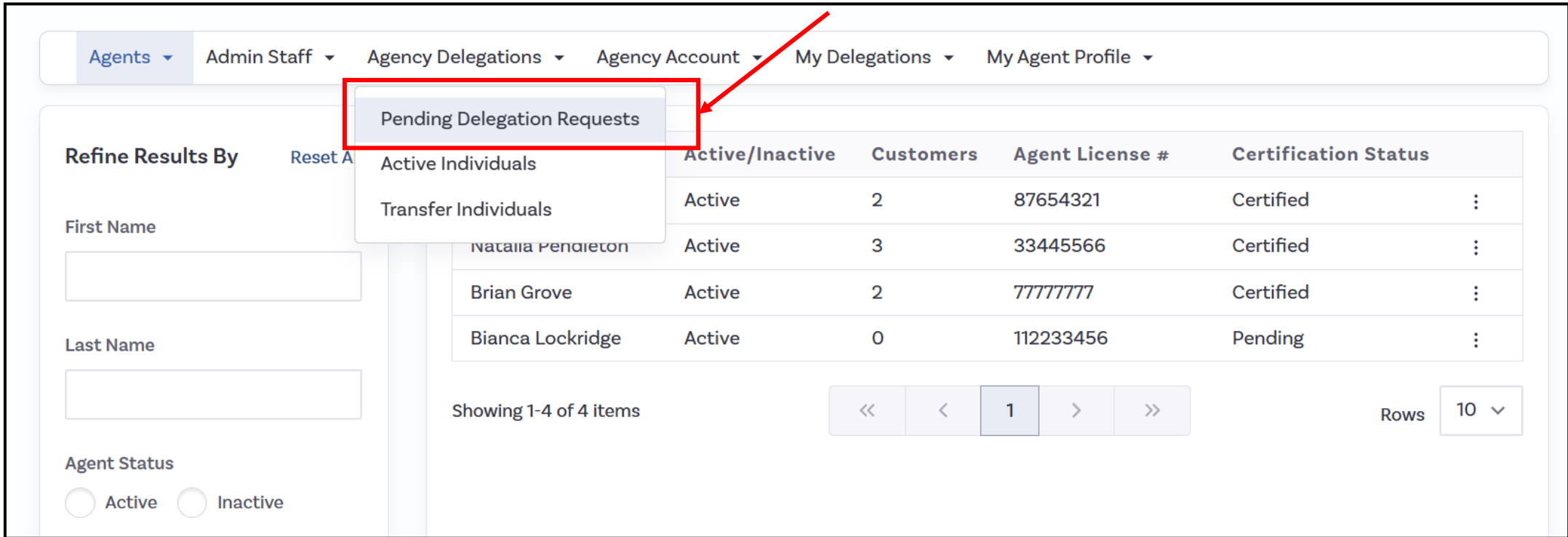
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Rows 10

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, 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' button and input fields for 'First Name' and 'Last Name'. The 'Agent Status' section has radio buttons for 'Active' and 'Inactive'. The main content area shows a table of delegation requests 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 pagination bar at the bottom indicates 'Showing 1-4 of 4 items' and includes navigation buttons. A 'Rows' dropdown is 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

<<<>>>

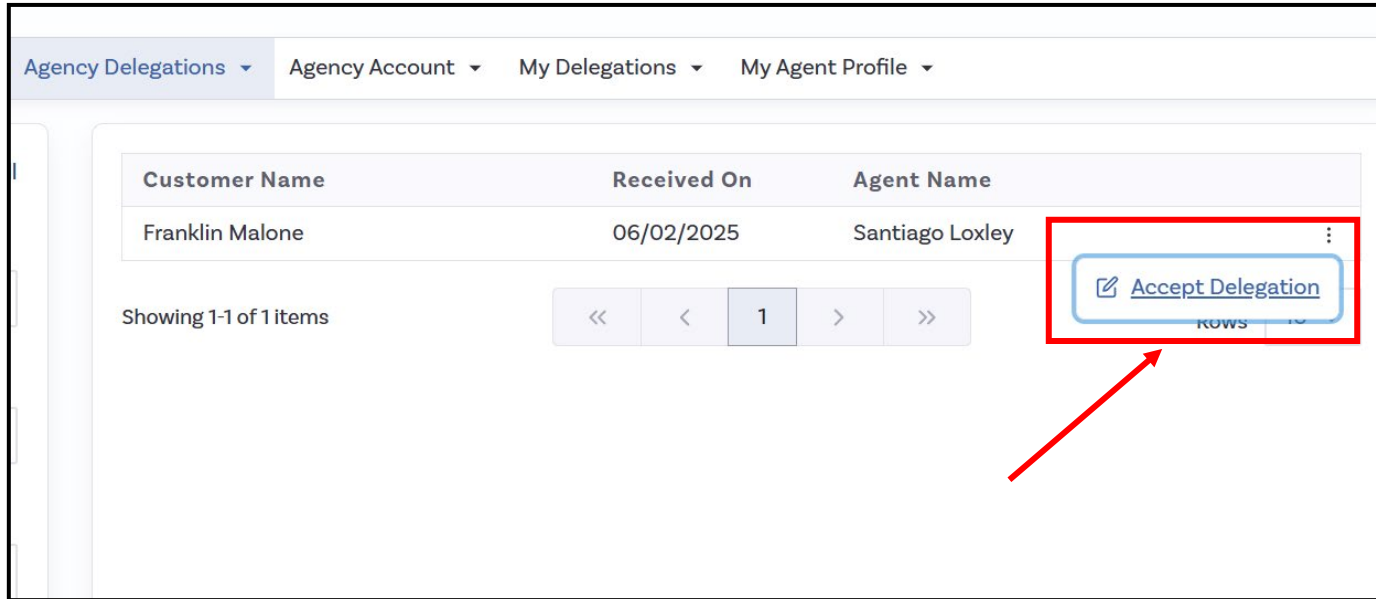
1

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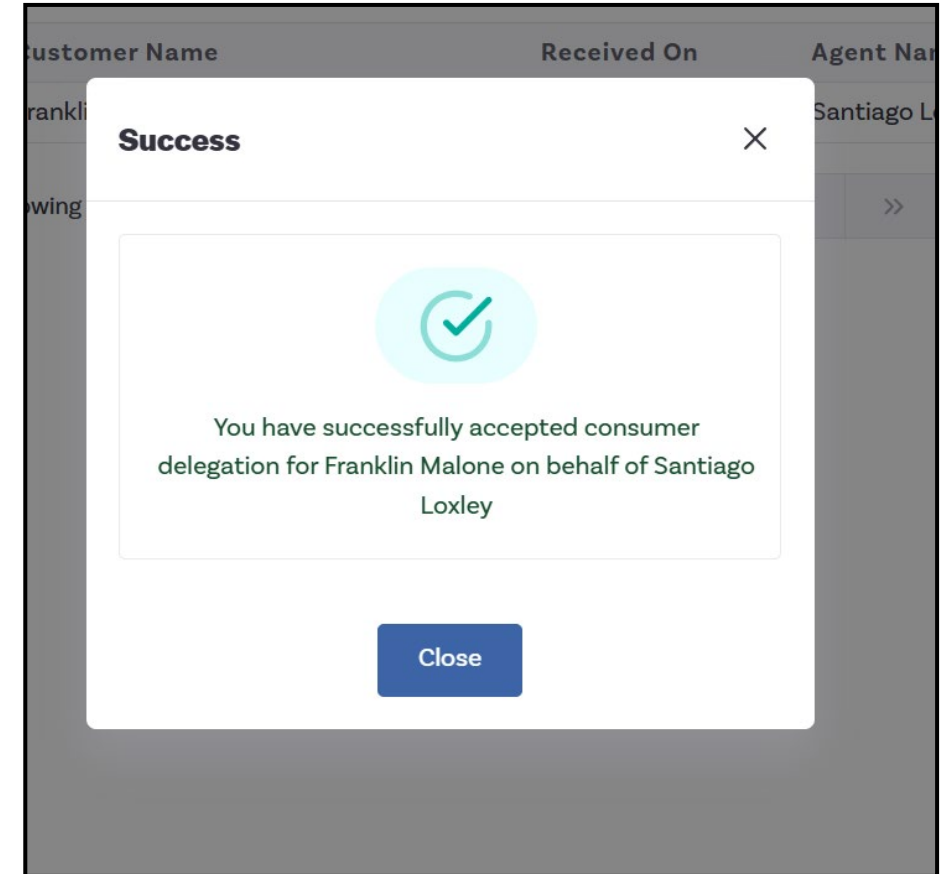
Rows10 ▾

Agency Manager Capabilities: Accept Delegation Requests

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



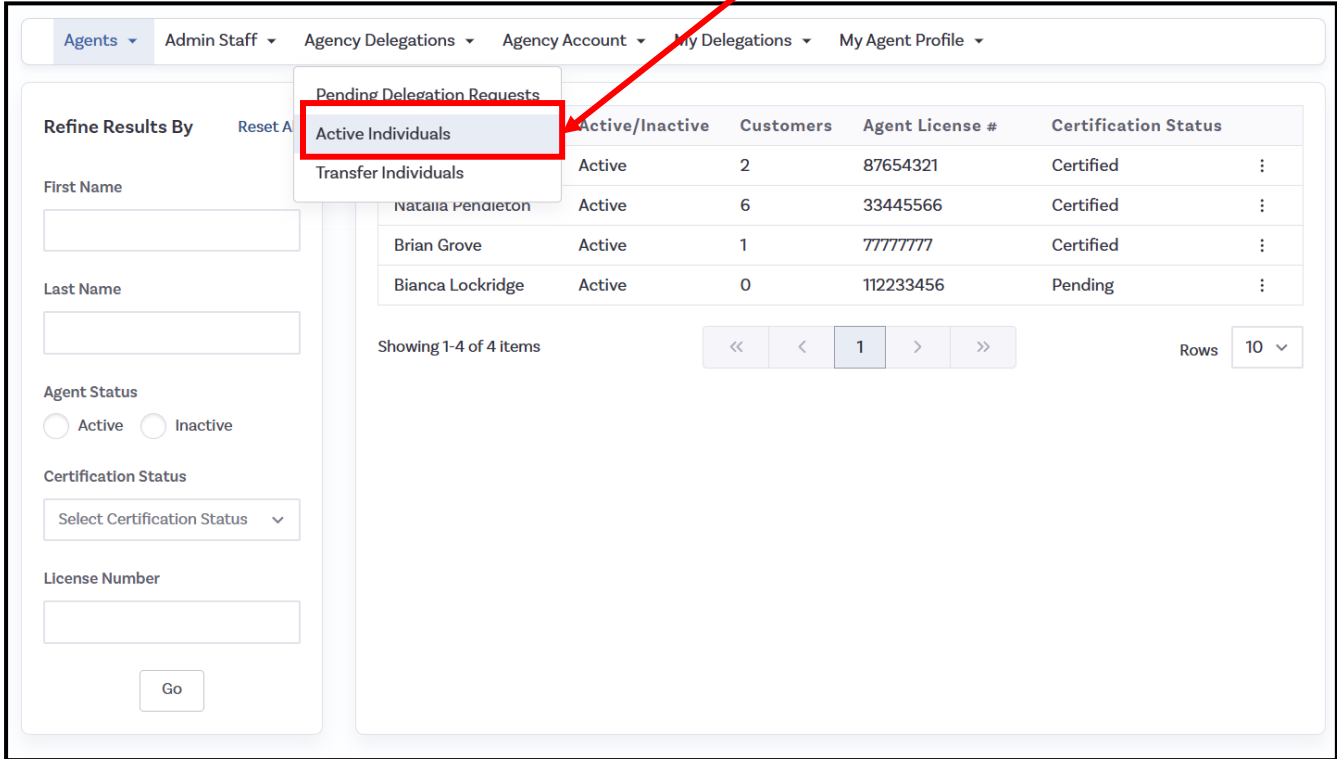
Step 4: The Agency Manager receives a success message that delegation was accepted.



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. This section includes input fields for 'First Name' and 'Last Name', radio buttons for 'Agent Status' (Active and Inactive), 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 table lists four individuals: Natalia Pendleton, Brian Grove, and Bianca Lockridge. The table shows 1-4 of 4 items. The pagination controls show page 1 of 1, and the 'Rows' dropdown is set to 10.

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

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 DENTAL PLAN

Molina 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.

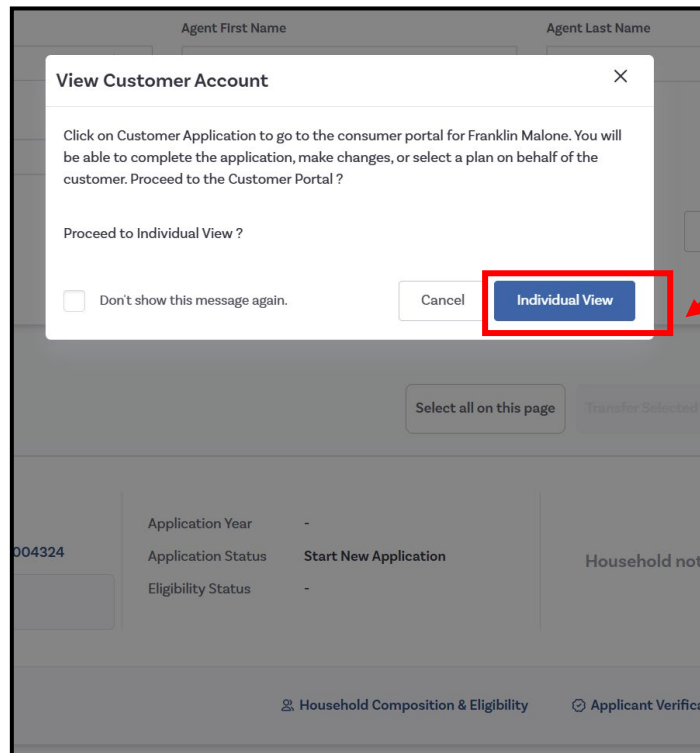
This screenshot shows the search results for the Agency Manager. At the top, there are search filters for Issuer (a dropdown menu), Agent First Name (Santiago), and Agent Last Name (a text input). Below these is the Agent NPN field. A 'Clear all' button and a 'Search' button are on the right. A 'See less' link is also present. The results section shows 'Showing 1-2 of 2 Items' with pagination controls (Previous, 1, Next). A 'Select all on this page' button, a 'Transfer Selected' button, and an 'Export Book Of Business' button are also visible. The first result is for Franklin Malone, with Household Case ID IL100004324. It shows the Agent as Santiago Loxley and NPN as -. The application status is 'Start New Application' and the eligibility status is '-'. A link 'Household not enrolled in a plan' is shown. Below the result are links for 'Household Composition & Eligibility', 'Applicant Verifications', and 'More Actions'. The second result is for Boris Crofton, with Household Case ID IL100004323, also showing 'Start New Application' status and 'Household not enrolled in a plan' link.

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

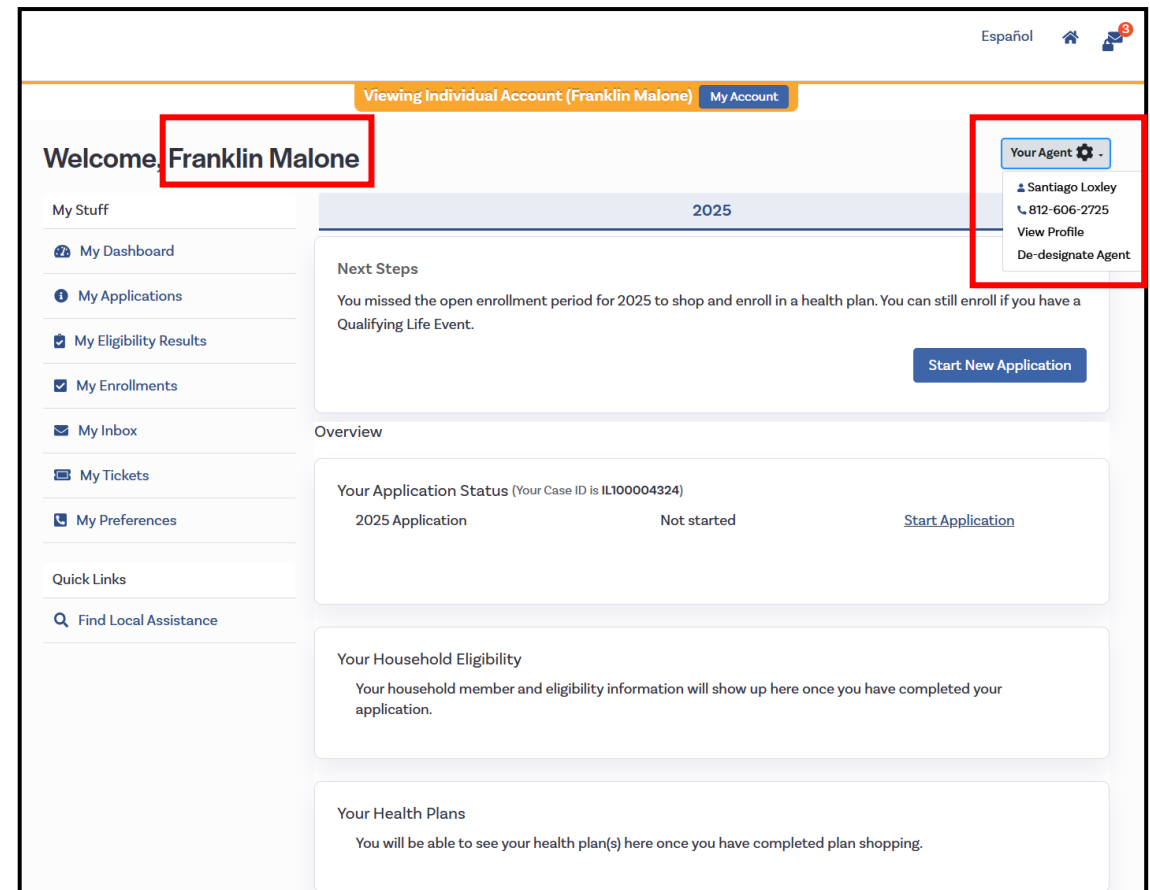
This screenshot shows the 'View Household Details' page for Franklin Malone. At the top, it says 'Showing 1-2 of 2 Items' with pagination controls (Previous, 1, Next). A 'Select all on this page' button, a 'Transfer Selected' button, and an 'Export' button are visible. The main content area shows the customer's details: Franklin Malone, Household Case ID IL100004324, Agent Santiago Loxley, and NPN -. The application year is '-', application status is 'Start New Application', and eligibility status is '-'. A link 'Household not enrolled in a plan' is shown. Below the details are 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 with a red box and a red arrow), 'Transfer Client', 'Resend Activation Email', 'Mark As Inactive', and 'View Enrollment Details'.

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.



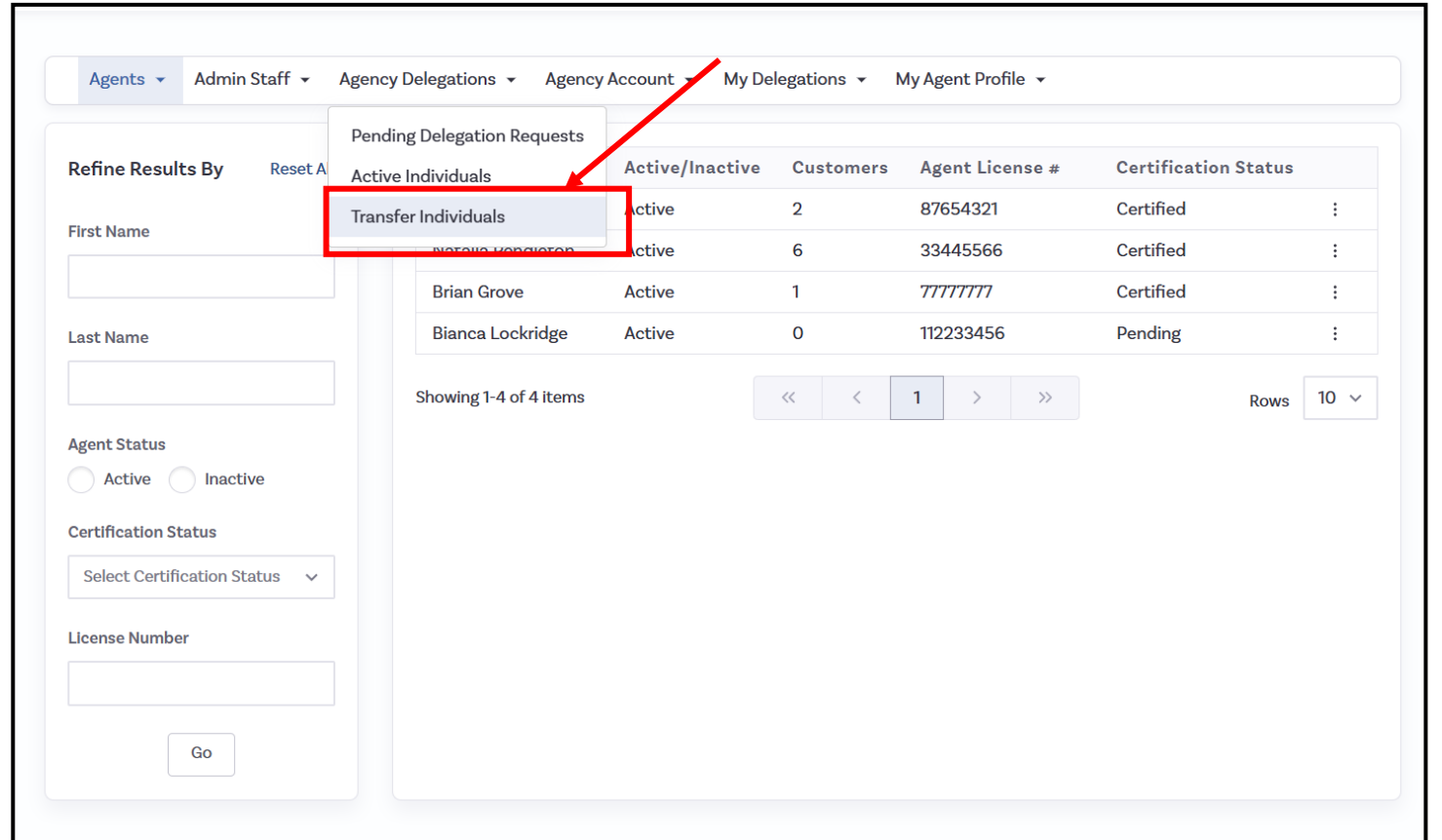
Step 7: The Agency Manager can act on behalf of customer Franklin, who is designated to agent Santiago.



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, and Application Year (a dropdown menu). A red box highlights the 'See all' button with a downward arrow, and a red arrow points to it from the right. Below the filters, there are pagination controls (Previous, 1, Next) and buttons for 'Select all on this page', 'Transfer Selected', and 'Export Book Of Business'. A client card for 'Miles Rigal' is visible, showing details like Household Case ID (IL100004256), Agent (Natalia Pendleton), Application Year (2025), and Application Status (Report a Change).

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 points to it from the right. 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

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

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

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
	Natalia Pendleton	Active	natalia-123@yopmail.com	123 Main Street, Chicago, IL 60224

Previous

1

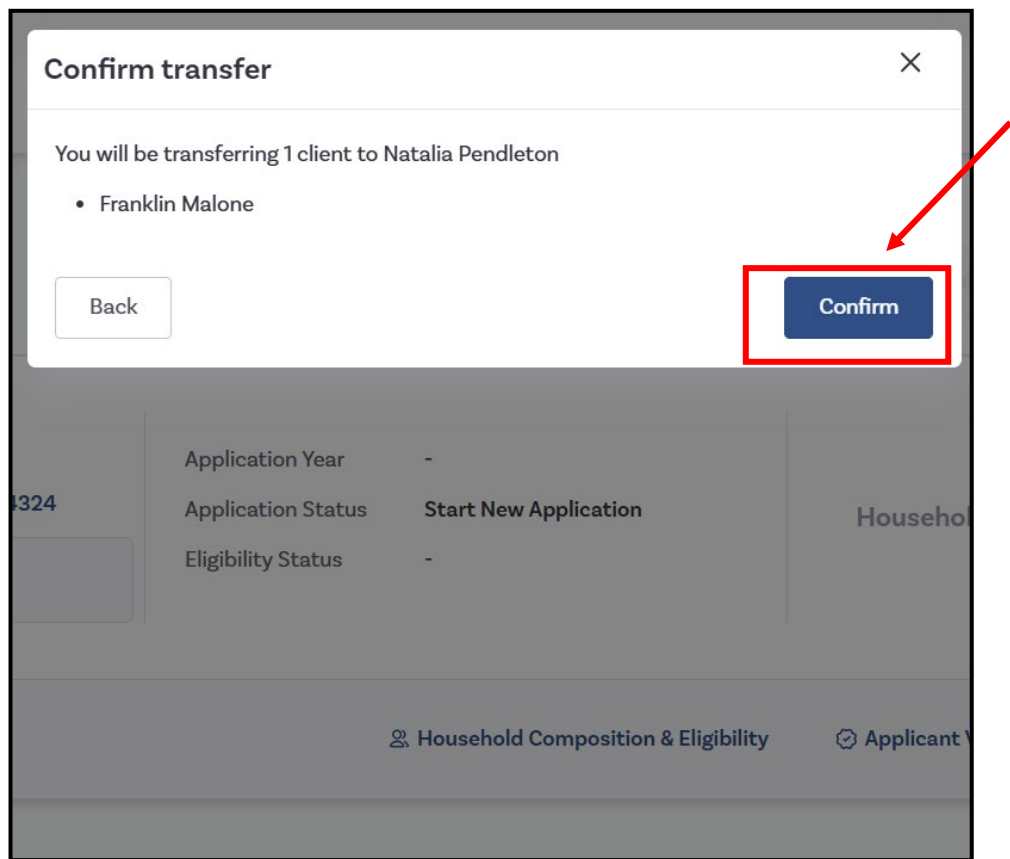
Next

Back

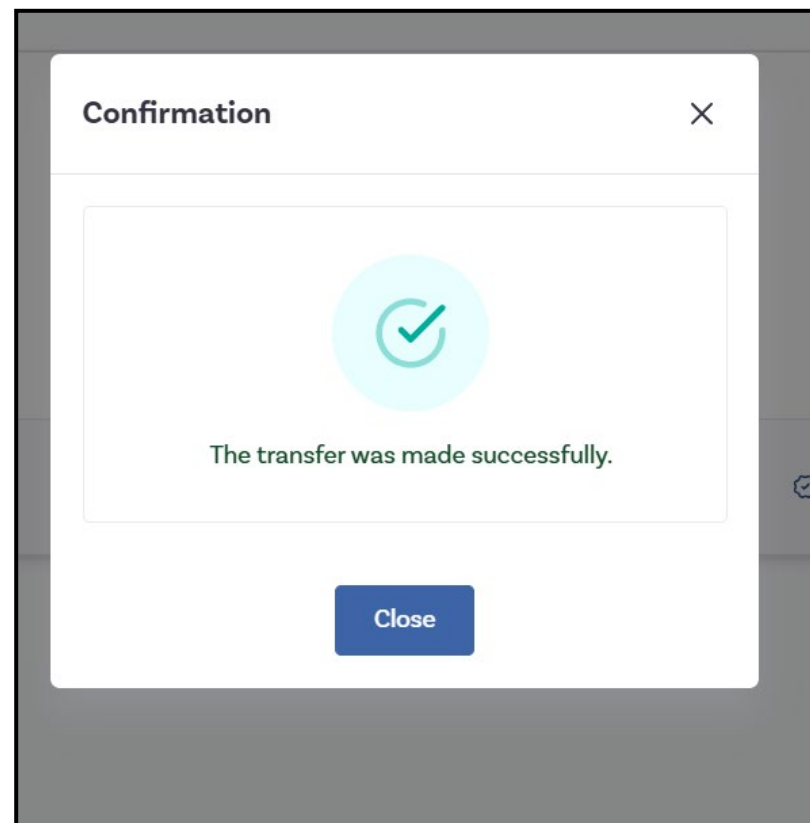
Next

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	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

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!