

ICHRA Clients Guide To Working With an Agent

You have an active account but want to assign an agent.

VIRGINIA

1. If you signed up using healthcare.gov the Health Insurance Marketplace in Virginia, you will need to fill out the "Required Privacy Consent Form" which gives me permission to access your current application. This will allow me to update the broker information and verify that the ICHRA submission dates are current. In Virginia will also need the name and date of birth of the principal account holder to access the account. You can access a link to the form on my website or you will be provided with the link by text message or email. It can be filled out on any device that is connected to the internet.

MARYLAND

1. If you signed up using Maryland Health Connection, the Health Insurance Marketplace in Maryland I will need the following information for the primary account holder, the name they used to create the account, their date of birth, last four digits of their social security number, and their full street address. This information can only be obtained by you and is used by the Marketplace to connect your account to my agent account and to verify that I the agent spoke with you. You can also call Maryland Health Connection at 855-642-8572 and let them know you would like to add me as your agent. You will need to give them my name "Sharon Sidbury" (make sure the spelling is correct) and my NPN (National Producer Number) #11466028 and they will be able to connect your account to mine. We will then resubmit the application to the insurance company so they can add me as you broker at the insurance company
2. If you signed up direct with the insurance company in Maryland or Virginia we will need to submit an Agent of Record Form to the company so they can add me as your assigned agent. The process will vary depending on the company and may require a wet signature from you. I will need your name and email address for this process and any other personal information that may be requested from the insurance company.
3. Your current plan including your price and coverage will not change.

ALL ICHRA EMPLOYEES

1. Throughout the year I send out periodic updates using an automated text messaging service. The number from that service is 571-534-4640 and will always have my name in the subject line. You can always opt out of these messages. When you opt out you will no longer receive important updates via text message. You can reply to these messages but since this box is not monitored on a regular basis there may be a delay in my response. If I haven't responded within 24 hours please message me through my 24hour text and voice mail system. The number will be provided to you in the text message.
2. The best way to contact me is through my 24 hour text and voice mail system. The number to the system is 703-947-0325. The mailbox to this system is unlimited and the mailbox is never full. Messages from this system come directly to my phone. By cooperating and leaving text and voice messages here instead of on my direct line will help everyone to have continued access to me especially during busy times. You will still have access to my direct line.

3. When Open Enrollment starts next year and you enroll or renew your plan, you will need to obtain a copy of your invoice as soon as possible and send a copy to me. You will receive a copy by mail or you can see if it is available in your online account. You will also need to fill out the TASC Reimbursement Form found on the website. I will provide you with a link where you send me the requested documents using a secure document upload link. I will forward it to your companies ICHRA provider. The link can be used to upload documents or pictures from any device connected to the internet. This is needed as proof of coverage and to set up payments through your employer for your insurance. This will be needed each year at Open Enrollment.
4. Individual Health Insurance are annual contracts that need to be renewed every year during Open Enrollment. You will receive updates ahead of time as to what steps you need to take.

Thanks for trusting me to assist you. Feel free to contact me with any questions or concerns you have throughout the year.

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