

ICHRA Clients Guide To Working With an Agent Self Submitters

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

VIRGINIA

1. You will need to login to your Virginia Insurance Marketplace account at <https://www.marketplace.virginia.gov/>
2. You will need to designate me as the agent of record on your account. You can search for me in the Help and Support section in your account under “Agents and Brokers” Search for me by my name Sheron Sidbury or by my Zip Code 22306. The Marketplace will message me about your request for assistance and I will approve your request. This lets both the Virginia Insurance Marketplace and the insurance company know that I am the agent working with you. It also gives me permission to assist with both accounts, by your request if needed.
3. The Marketplace will notify the insurance company that I am the assigned agent working on your account.
4. You only need to update your application if you need to change any information. If no changes are needed do not edit your application

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 “Sheron 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. You can also manually choose to add an agent at any time during the application process before you submit the application. You can find certified agents in the following link:
<https://app.marylandhealthconnection.gov/hixui/public/home.html#/getEstimate/findAssistance?notFromAnon=true&shoppingYear=2023>
3. 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.

4. Your current plan including your price and coverage will not change.

ALL ACA ENROLLEES

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. To opt back in text "ACA" to 571-534-4640. 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 on my direct number 571-636-9366.
2. If you opt out you can always check this page for updates
<https://www.youdesignaplan.com/ichra>
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. Send it to my secure document upload site
<https://www3.mydocsonline.com/customerupload/1a1b67a484317411a1d8a66f889c>
4. If you enroll in a Kaiser plan follow the instructions here to locate your invoice
https://www.youdesignaplan.com/files/ugd/cab217_a42fb62947de4b5eaad38cb419c805ce.pdf
5. Depending on the platform your company uses for ICHRA enrollments you may need to fill out the TASC Reimbursement Form found on the website. You can send all documents to me using the following secure document upload link.
<https://www3.mydocsonline.com/customerupload/1a1b67a484317411a1d8a66f889c> 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. The password will be sent to you via text message.
6. The best way to contact me is via my direct line 571-636-9366. Please leave a message with your name and the question you would like to ask. This will help me to prepare before reaching out to you.
7. Individual Health Insurance are annual contracts that need to be renewed every year during Open Enrollment which starts November 1st each year. You will receive updates ahead of time as to what steps you need to take.

8. The renewal year will be easier. If you like your current plan you can auto renew if your reimbursement fully covers the new price. If the price exceeds your reimbursement please contact me. It is recommended that you review the new plans and prices every year.

9. For renewals if your information has changed, update it, Shop for a plan or keep the same plan, click through the application, make the necessary updates. Sign and submit it to send the changes to the insurance company.

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

Sheron E Sidbury
Healthcare Cost Containment Specialist
Address: 7708 Richmond Hwy #1060, Alexandria, VA 22306
Phone: 571-636-9366
Automated Text Service: 571-534-4640
Book an Appointment: <https://calendly.com/sesinsureme>
Email: sheron@sesinsureme.com
Website: <https://www.youdesignaplan.com/>



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