

# ICHRA Clients Guide To Working With an Agent Currently Enrolled

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

## **VIRGINIA “NEW FOR 2024”**

1. If you signed up using healthcare.gov the Health Insurance Marketplace in Virginia or a web broker site connected to healthcare.gov such as Health Sherpa in 2023 and had an active account as of September 1, 2023 your account was migrated to the new Virginia Health Benefit Exchange. For 2024 and going forward you will need to create an account on the Virginia Marketplace to access your information and submit an application for 2024 at <https://www.marketplace.virginia.gov/> This also applies to all new accounts.
2. You will need to fill out the “Required Privacy Consent Form” (For Virginia Only) found here <https://www.youdesignaplan.com/updates> which gives me permission to access your current application in case you need assistance in the future. Since my role is to continually monitor your active enrollment in an individual health insurance plan for ICHRA compliance reasons, you will need to accept my agent designation request within your account once it is created.
3. You will then need to review and update your application to be sure the information is still accurate. Submit the application. Pick a plan
4. You can see Virginia plans and prices here <https://enroll.marketplace.virginia.gov/hix/preeligibility#/?fromHome=1>

## **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. 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.
4. You will need to complete the Required Telecommunications Preferences Consent Form in the following link <https://form.jotform.com/232886685689078> You will receive a copy

of the completed document. You can see a blank copy of the document here.  
[https://www.youdesignaplan.com/files/ugd/cab217\\_ea32d0ba7c724f34be5743886075c32c.pdf](https://www.youdesignaplan.com/files/ugd/cab217_ea32d0ba7c724f34be5743886075c32c.pdf)

### **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 on my direct number 571-636-9366.
2. If you opt out you can always check this page for updates  
<https://www.youdesignaplan.com/updates> You will also find information for ICHRA clients here <https://www.youdesignaplan.com/ichra>
3. 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.
4. 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.
5. If you enroll in a Kaiser plan follow the instructions here to locate your invoice  
[https://www.youdesignaplan.com/files/ugd/cab217\\_a42fb62947de4b5eaad38cb419c805ce.pdf](https://www.youdesignaplan.com/files/ugd/cab217_a42fb62947de4b5eaad38cb419c805ce.pdf)
6. 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.
7. 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.
8. The renewal year will be easier. You will need the amount of your ICHRA reimbursement, Shop for a plan, click through the application to submit it 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  
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Book an Appointment: <https://calendly.com/sesinsureme>  
Email: [sheron@sesinsureme.com](mailto:sheron@sesinsureme.com)  
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