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Navigating to the Enhanced Direct Enrollment Portal

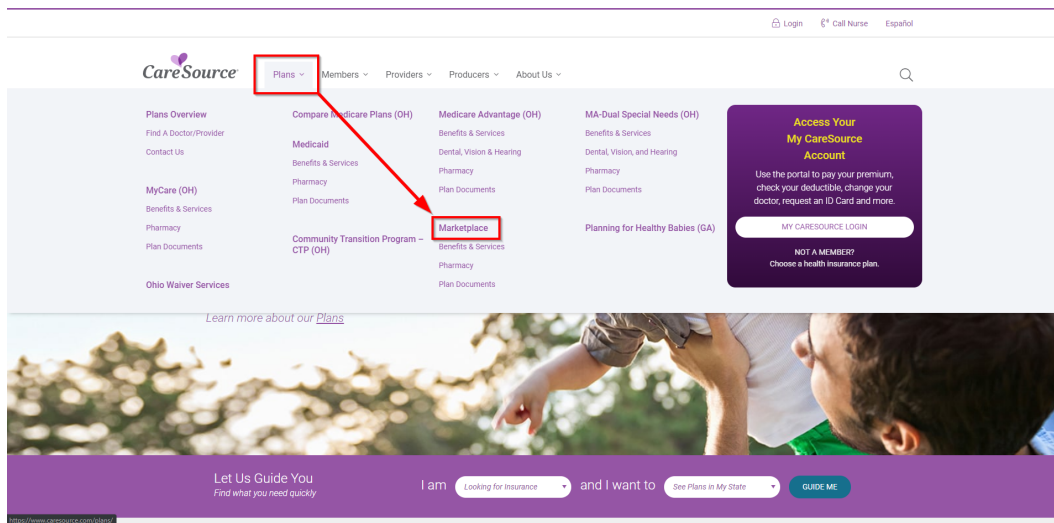
Directly

Click on or type in <https://enroll.caresource.com>

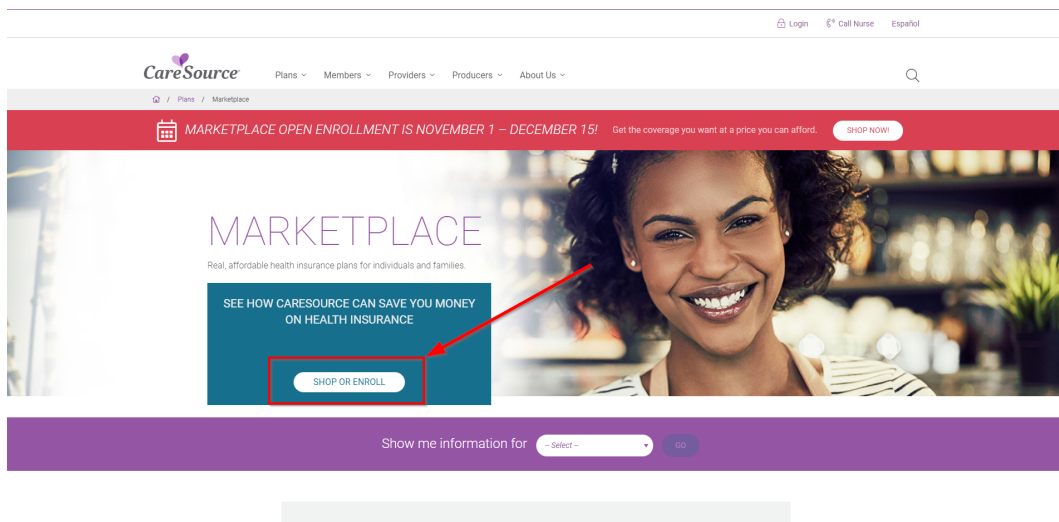
Through Caresource.com

Navigate to www.caresource.com

Hover-over 'Plans' and click on 'Marketplace'

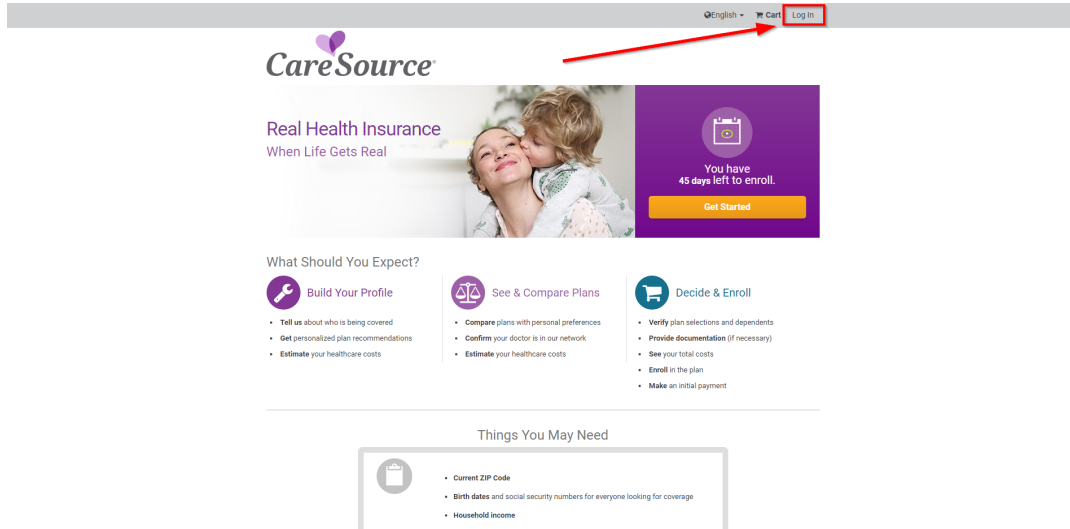


Once on the Marketplace landing page, click on 'Shop or Enroll'

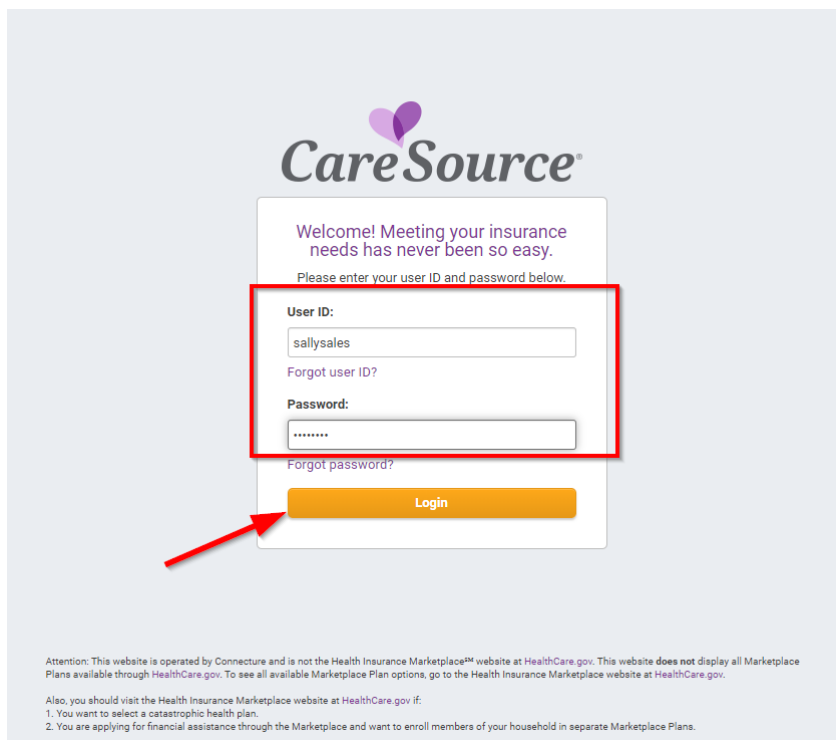


Logging In

Once you've accessed the CareSource Marketplace Direct Enrollment Portal, you will see the following page. Consumers will click 'Get Started.' However, Agents should click 'Log In' to access their EDE dashboard.



Then, when presented with the log in screen, use the log in credentials you've received in the 'Concerning your user account for CareSource Marketplace Direct Enrollment Portal'



Navigating the Dashboard

The Dashboard provides an overview of all sales activity you have access to, including Quotes, Applications, a Message Center for any changes on cases, etc. These are widgets that can be dragged and dropped for customization.

The screenshot shows the CareSource dashboard interface. At the top, there's a header with the CareSource logo, a search bar for "Case name", and navigation tabs for Dashboard, Activities, Work queue, and Tools. The main area contains several widgets: "New business scorecard" (Individual - Last 14 days), "Message center" (a table of case messages), "Quote activity" (a table of quote data), and "Application activity" (a table of application data). Each widget has a search bar and pagination controls. A "Sales funnel" widget at the bottom left shows an error message: "An error has occurred while processing your request. Please verify that Adobe Flash is enabled in your browser."

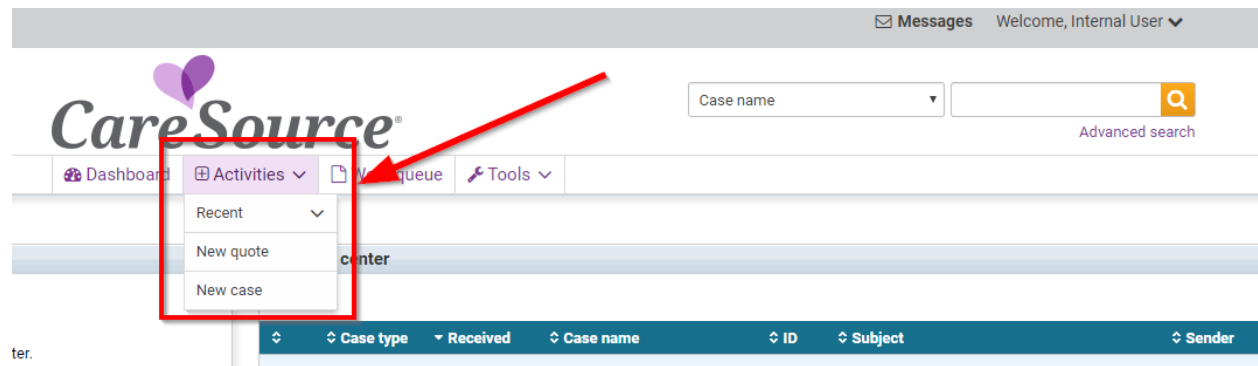
Case type	Received	Case name	ID	Subject	Sender
Application	10/30/2019	John Smith	2325	CareSource Application Status Change	Admin, System
Application	10/24/2019	Meredith Grey	2107	CareSource Marketplace Application/Enrollment Status	Admin, System
Application	10/24/2019	Ben Weaver	2108	CareSource Marketplace Application/Enrollment Status	Admin, System
Application	10/22/2019	John Rural	2060	CareSource Marketplace Application/Enrollment Status	Admin, System

You can search for any open cases you have access to using the search function.

This screenshot is similar to the previous one but highlights the search functionality. A red box encloses the "Case name" search bar in the top right corner, and a red arrow points to it from below. The "Message center" table is visible below the search bar.

Case type	Received	Case name	ID	Subject	Sender
Application	10/30/2019	John Smith	2325	CareSource Application Status Change	Admin, System
Application	10/24/2019	Meredith Grey	2107	CareSource Marketplace Application/Enrollment Status	Admin, System
Application	10/24/2019	Ben Weaver	2108	CareSource Marketplace Application/Enrollment Status	Admin, System
Application	10/22/2019	John Rural	2060	CareSource Marketplace Application/Enrollment Status	Admin, System

The Activities menu allows you to see recent activity, create a new Quote, and create a new Case.



Starting a new Quote

To start a new quote, click 'Activities' → New Quote. This will take you to the EDE Shopping Page. Click 'Get Started.'

Quote Summary Cart Internal User

CareSource

Real Health Insurance
When Life Gets Real

You have 45 days left to enroll.
Get Started

What Should You Expect?

- Build Your Profile**
 - Tell us about who is being covered
 - Get personalized plan recommendations
 - Estimate your healthcare costs
- See & Compare Plans**
 - Compare plans with personal preferences
 - Confirm your doctor is in our network
 - Estimate your healthcare costs
- Decide & Enroll**
 - Verify plan selections and dependents
 - Provide documentation (if necessary)
 - See your total costs
 - Enroll in the plan
 - Make an initial payment

You can choose to shop now or walk the customer through applying for financial assistance.

If choosing Shop Now, you will be prompted to enter in the customer's household information.

45 days left for open enrollment

You have until 12/15/2019 to apply for coverage. If you apply today, your coverage will start on **01/01/2020**

Looking for coverage
sooner?

[See if You Qualify](#)

My household:

* Zip Code	State	County	Are you shopping for a Child Only plan? ⓘ		
<input type="text" value="45241"/>	<input type="text" value="OH"/>	<input type="text" value="Perry"/>	<input type="text" value="No"/>		
* First Name	* Birth Date	* Relationship	* Sex	* Tobacco User	
<input type="text" value="Billy"/>	<input type="text" value="01/01/1977"/>	<input type="text" value="Primary"/>	<input type="text" value="Male"/>	<input type="text" value="No"/>	
<input type="button" value="Add Dependent"/>					

Do you want to consider your tax credit while shopping for plans? (Optional)

You may be eligible for federal government assistance to help make health insurance affordable to you through tax credits. Tax credits are based on factors such as: household income and the number of people in the household.



I don't know my tax credit and want to see if I am eligible for assistance.

My annual household income is: ⓘ

My household size is: ⓘ



I already know my tax credit and want to shop with it.

My tax credit amount is:


Note: Selecting this option will not return cost-sharing reduction plans you may be eligible for.

Once entered, you can then guide the customer through questions regarding their coverage preferences (deductible, premiums, types of services, etc.) and cost estimations, or choose to browse all plans.

Quote Summary

Cart


Internal User



STEP 1: Build Your Profile STEP 2: See & Compare Plans STEP 3: Decide & Enroll

Tax Credit: (Find out if you qualify)


How do you want to shop for plans?



Guide Me

I'd like to answer a few lifestyle and budget questions so that you can help guide me to the right plan.

Select Guide Me



Browse All Plans

I'd just like to view all your available plans and determine the right plan myself.

Select Browse All Plans

Attention: This website is operated by CareSource and is not the Health Insurance Marketplace™ website at [HealthCare.gov](#). This website does not display all Marketplace Plans available through [HealthCare.gov](#). To see all available Marketplace Plan options, go to the Health Insurance Marketplace website at [HealthCare.gov](#).

Also, you should visit the Health Insurance Marketplace website at [HealthCare.gov](#) if:

1. You want to select a catastrophic health plan.

2. You are applying for financial assistance through the Marketplace and want to enroll members of your household in separate Marketplace Plans.

You will then be presented with a list of plans. If using the ‘Guide Me’ method, a ‘best match’ plan will appear at the top. All other plans are available beneath ordered by best match. Filters are available for refinement, and you can change the sorting method.

8

Congratulations, you completed the guide and have a 50% match plan!

Based on what you told us, we recommend...

50% Match

Your percentage match

Not a match

This plan matches 50% of your preferences. We looked for the plans that met your preferences. This plan meets most of your criteria.

CareSource Marketplace Standard Silver

\$520.19/mo

[View details](#)

[View your estimated costs](#)
[View a summary of your answers](#)

See & Compare Plans

Shop for:

Medical

[Find a Doctor/Provider](#)

Sort by: Best Match

[Compare \(up to 3 plans\)](#)

No tax credit has been applied to the premiums displayed.

BEST MATCH	MARKETPLACE PLAN	
<p>CareSource Marketplace Standard Silver</p> <p>Hide this plan</p>		
<p>Preference Match</p> <p>+</p>	<p>Plan Benefits</p> <p>View Details</p>	<p>Estimated annual cost</p> <p>+</p>
<p>50% Match</p>	<p>Metal Tier Silver</p> <p>Overall Rating ★★★★☆</p> <p>Deductible \$5,900 / \$5900 per person \$11800 per group</p> <p>Out-of-Pocket Maximum \$6,800 / \$6800 per person \$13600 per group</p>	<p>Min \$6,242</p> <p>Est \$6,525</p> <p>Max N/A</p>
<p>Total Monthly Cost \$520.19 /mo</p> <p>View Cost Breakdown</p> <p>Edit Estimated Tax Credit</p> <p>Add to Cart Add to Quote</p>		
<p>MARKETPLACE PLAN</p> <p>CareSource Marketplace Standard Silver Dental, Vision, & Fitness</p> <p>Hide this plan</p>		
<p>Preference Match</p> <p>+</p>	<p>Plan Benefits</p> <p>View Details</p>	<p>Estimated annual cost</p> <p>+</p>
<p>Add plan to compare</p>		

Plan Features

- ☐ Adult Dental/Vision Included
- ☐ Fitness Center Benefit
- ☐ Pediatric Dental/Vision Included
- ☐ Mental Health Coverage
- ☐ Maternity Care
- ☐ Emergency Services
- ☐ Specialist Coverage
- ☐ Prescription Drug Coverage

Metal Tier

- ☐ Bronze

Add to Cart will allow you to move on to navigating the Financial Assistance application and continue to HealthSherpa to continue with the application, while 'Add to Quote' will allow you to save and create a case within the dashboard.

Quote & Create Case

Quote Summary

1 plan added to quote

Plan	Monthly Rate
CareSource Marketplace Standard Silver	\$520.19

Save & Create Case

Internal User

STEP 3: Decide & Enroll

Tax Credit: (Find out if you qualify)

guide and have a 50% match plan!

ommend...

CareSource Marketplace Standard

Add to Cart & Apply for Financial Assistance

Items In Your Cart

Review or edit your plan selections below. To enroll in this Medical plan with a tax credit and/or cost-sharing you must apply for financial assistance.

CareSource Marketplace Standard Silver

Medical

Tier:
Silver

Who's Covered: [\(Edit\)](#)
Billy

Cost Breakdown:
Monthly Cost
[View Cost Breakdown](#)

Overall Rating ⁱ
★★★★☆

Deductible
\$5,900 / \$5900 per person |
\$11800 per group

Monthly Cost: \$520.19

Remove Plan

Change Plan

Plan quality ratings and enrollee survey results are calculated by CMS using data provided by health plans in 2019. The ratings are being displayed for health plans for the 2020 plan year. Learn more about these ratings. <https://www.healthcare.gov/quality-ratings/>

Total Monthly Cost: \$520.19

Continue Shopping

Apply For Financial Assistance

Creating a Case

When creating a case directly or while saving a new quote, you will be asked to enter the Demographic and Contact information for the customer. You'll need to confirm you've reviewed the HIPAA Privacy Policy as well as set opt-in communication preferences for the customer.

Save quote & create case

The case information provides the high level information related to multiple quotes and applications.

[Cancel](#) [Continue >](#)

Case information

* Required

Demographics

* Case name:

Address line 1:

Address line 2:

City:

* State: * ZIP code: -

County:

HIPAA privacy policy

Your Information. Your Rights. Our Responsibilities.

This notice describes how medical information about you may be used and disclosed and how you can get access to this information. Please review it carefully.

Your Rights

You have the right to:

- Get a copy of your health and claims records
- Correct your health and claims records

* ☐ By checking the box, I confirm that I have viewed the HIPAA Privacy Policy.

Contact Information

First name:

Relationship:

☒ Same address as above?

Address line 1:

Address line 2:

City:

State: ZIP code: -

Preferred Method of Contact:

Best Time to Contact:

Last name: Suffix:

Phone number(s): (###) ###-#### Ext.:


(###) ###-#### Ext.:

(###) ###-#### Ext.:

(###) ###-#### Ext.:

Email:

Once the case is created, you will be taken to the Case with details on the quote. The quote will populate under the New Business tab of the Case.



Case name

Advanced search

Dashboard

Activities

Work queue

Tools

Billy Ohioman

Case ID: 2670

Quote ID: 2348

Status: Prospect

Case information

New business

Marketplace eligibility

Case notes and messages

Case history

Quote summary

Quote status: Quoting

The following is a summary of the quote information.

Withdraw

Modify quote

Generate proposal

Apply

Quote summary -- 2348

Quote Detail

Quote status: Quoting

Created by: Internal User

Coverage type: Individual and Family Plans

Requested effective date: 01/01/2020

Number of applicants: 1

Applicant(s) Information

Person(s) Covered	Date of Birth	Age	Gender
Primary Applicant	01/01/1977	43	Male

Premium Tax Credit Information

Person(s) Covered	Description	Premium Tax Credit Amount
Primary Applicant	The Premium Tax Credit covers only on-exchange plans for the members listed. The adjusted premium for plans is the monthly premium minus the Premium Tax Credit where applicable.	\$0.00

Medical

Plan name	Plan type	Monthly premium	Adjusted Premium
<input type="checkbox"/> CareSource Marketplace Standard Silver	HMO	\$520.19	\$520.19
Delete			

Proposed Insured Rate

\$520.19

Withdraw

Modify quote

Generate proposal

Apply

Applying for Coverage

When continuing with the application, either from a quote or from within the shopping page, you'll be asked to review the plan selection and then Apply for Financial Assistance. Once you click 'Apply for Financial Assistance, you'll be directed to HealthSherpa.

Items In Your Cart

Review or edit your plan selections below. To enroll in this Medical plan with a tax credit and/or cost-sharing you must apply for financial assistance.

CareSource Marketplace Standard Silver

Tier: Silver	Who's Covered: (Edit) Billy	Cost Breakdown: Monthly Cost \$520.19 View Cost Breakdown
Overall Rating ⓘ ★★★★☆		
Deductible \$5,900 / \$5900 per person \$11800 per group		
Remove Plan	Change Plan	Monthly Cost: \$520.19


Plan quality ratings and enrollee survey results are calculated by CMS using data provided by health plans in 2019. The ratings are being displayed for health plans for the 2020 plan year. Learn more about these ratings. <https://www.healthcare.gov/quality-ratings/>

Total Monthly Cost: **\$520.19**

[Continue Shopping](#) [Apply For Financial Assistance](#)

First-time users

If using our EDE for the first time, you may be prompted to create a new HealthSherpa account as well as an identity verification. When prompted, enter your personal info.

**Personal Info**

We'll need some basic information so we can get your account created.

FIRST NAME

LAST NAME

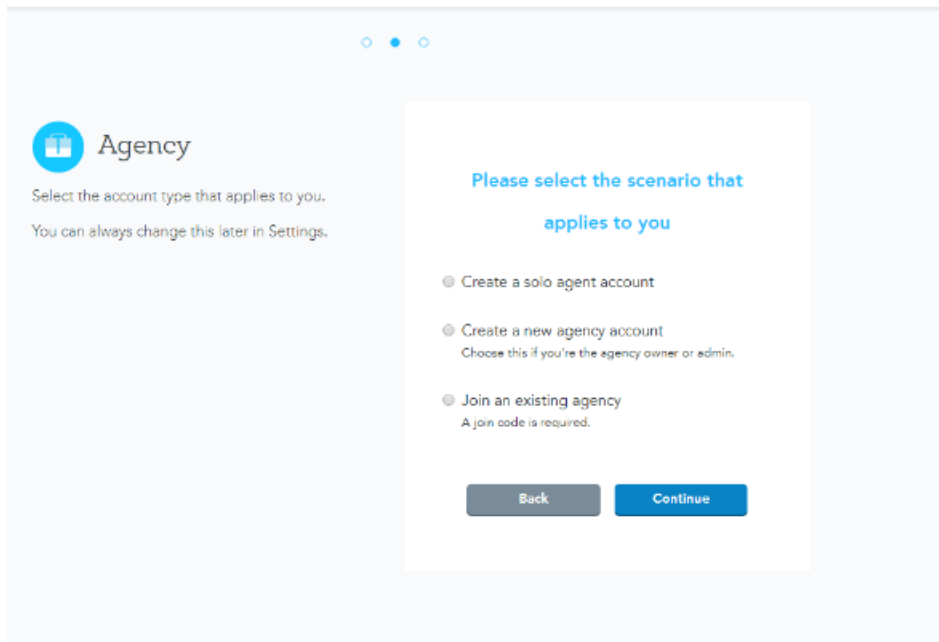
COMPANY NAME

PHONE NUMBER

(NNN) NNN-NNNN

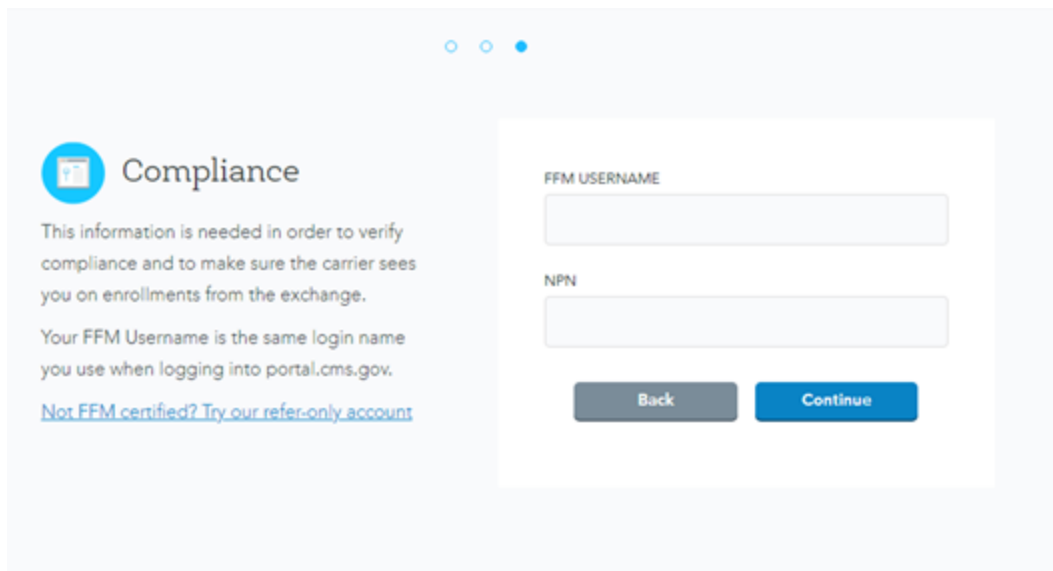
[Back](#) [Continue](#)

Select “Create a solo agent account”



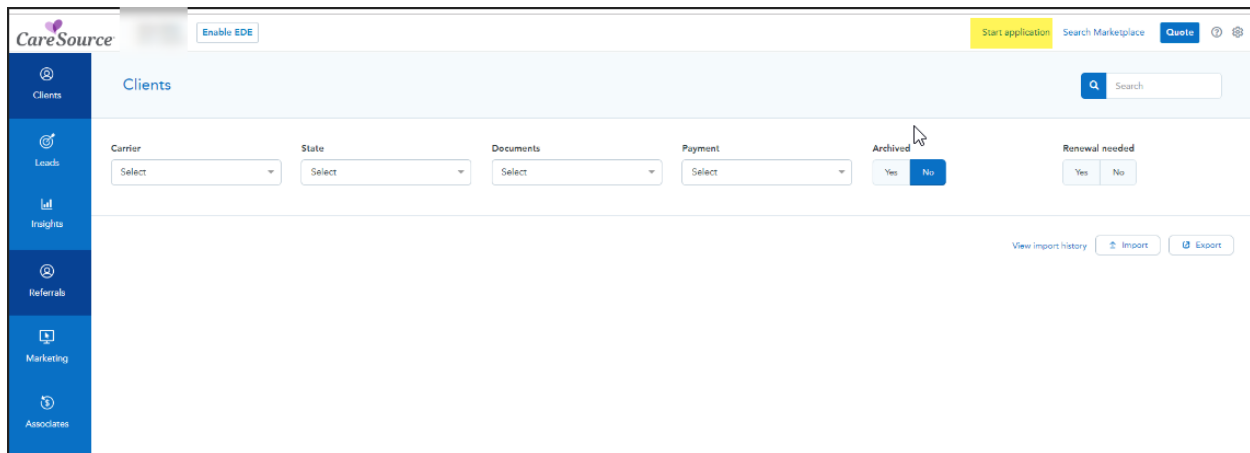
The screenshot shows a web interface for creating an agency account. On the left, there is a blue circular icon with a building and the word "Agency" below it. Text below the icon says: "Select the account type that applies to you. You can always change this later in Settings." On the right, a white box contains the heading "Please select the scenario that applies to you" in blue. Below this are three radio button options: "Create a solo agent account" (which is selected), "Create a new agency account" (with a subtext "Choose this if you're the agency owner or admin."), and "Join an existing agency" (with a subtext "A join code is required."). At the bottom of the white box are two buttons: "Back" and "Continue".

Enter your FFM Username and NPN Number



The screenshot shows a web interface for compliance information. On the left, there is a blue circular icon with a document and the word "Compliance" below it. Text below the icon says: "This information is needed in order to verify compliance and to make sure the carrier sees you on enrollments from the exchange. Your FFM Username is the same login name you use when logging into portal.cms.gov. [Not FFM certified? Try our refer-only account](#)". On the right, a white box contains two input fields: "FFM USERNAME" and "NPN". Below these fields are two buttons: "Back" and "Continue".

Click on Start an Application



Then select the client state and click Enable EDE

Start an application

Start a new application for Marketplace coverage

Powered by
EDE

Enable EDE to make submitting and updating applications faster and easier than ever!

Do all of the following directly from your HealthSherpa dashboard, without going to Healthcare.gov:

- Find and access any existing Marketplace application
- Submit new applications
- Report changes
- Upload documents
- Make payments
- Change plans
- Renew with a pre-filled application
- See real-time payment and follow-up status

Enable EDE

You can also search in Healthcare.gov.

Select your client's state

Select client state

Search at HealthCare.gov

You'll then be walked through Identity Verification fields before you can continue.

Completing and Submitting the Application

You'll then be asked to search to see if the member has an existing application on the Healthcare marketplace. You can do this directly from the HealthSherpa portal (1) or you can search at Healthcare.gov (2).

Start an application

Start by searching for an existing application. If an application exists, please update it instead of creating a new one.

First name

Billy

Last name

Ohioman

Date of birth

01/01/1977

State (Optional)

Ohio

☒ I've received permission from this consumer to work on their behalf.

1

Search

Or search by SSN

With EDE, new apps and renewals can be done entirely on HealthSherpa!

That means no more redirects to Healthcare.gov.

- Search for an existing app, 75% of the time one is found.
- Apps sync in real-time to HealthCare.gov.
- When you finish, you'll see exact Marketplace eligibility and subsidy results.

You can also search in Healthcare.gov. ?

Select your client's state

Select client state

Search at HealthCare.gov

2

If using HealthSherpa, the application will be returned, or you can create a new Application. If using Healthcare.gov, you will use Healthcare.gov to complete the application.

[Search](#)

Or search by SSN

No results found.

[Create a new application](#)

Select client state

[Search at HealthCare.gov](#)

Once in the application, work through the entire application sections (Primary Contact, Household, Members, Additional Question, Finalization.) If applying for financial assistance, you'll also need to enter details about the customers household income.

[Primary contact](#)

[Contact information](#)

[Verify identity](#)

[Household](#)

[Members](#)

[Additional questions](#)

[Finalize](#)

[Contact information](#)

[Primary contact person](#)

First name: Billy

Middle (Optional):

Last name: Ohioman

Suffix (Optional): Select

Social Security number (SSN): XXX-XX-XXXX

Date of birth: 01/01/1977

Email address:

Phone number: Phone type:

Eligibility results will be returned, including any follow-ups or next steps. Download the Eligibility Letter which will contain additional information and click Continue to finish the application.

Review eligibility results

Before completing your enrollment, please do a final review of your eligibility results.

Applicants

Name	Eligibility
✔ Billy Ohioman	Eligible and enrollable for Marketplace plans Did not apply for financial assistance Followups required: Verify citizenship by 2/3/2020

For more details on your eligibility, download the official letter here. You'll need to reference this document to continue the application submission.

[Download Eligibility Letter](#)

[Continue](#)

You'll be able to walk the member through making their first premium payment, and have a button to return to the EDE Case and Dashboard at the bottom (Return to Partner) as well.

You've finished your application!

Make sure to complete the following steps to secure your coverage for the year!

1 Make your first premium payment

You'll need to make your first premium payment of **\$507.29** by **11/30/2019**

Applicant

Action

Billy Ohloman

[Pay premium](#)


CareSource

CareSource Marketplace Standard
Silver

\$507.29/mo

2 Submit required documents to the Marketplace

Billy Ohloman

Verify citizenship by 2/3/2020

3 Expect communications from us and from the Marketplace

HealthCare.gov may send you notices and communication about your coverage.

Log into your account with us to view your Marketplace notices, make updates to your application or coverage, and manage your information.

[Return to partner](#)

Case Information

Once a case is created, it will contain basic Case information, quotes for new business, application summaries, marketplace eligibility, a notes/messages dashboard, as well as a case history.

Application summary includes a details about the approved application, as well as links to view the application within HealthSherpa and a button to pay any outstanding premiums.


Case informationNew businessMarketplace eligibilityCase notes and messagesCase history

Application summary -- #2349
Attachments (0)
Notes and messages
History

Application summary

Application status: Accepted

The information listed below is a summary view of the application and status.

 Congratulations! Your application was approved by the Health Insurance Marketplace.

[View application](#)[Duplicate check](#)[Pay Now](#)

Application summary

Application information - Paper

Requested effective date: 12/01/2019
Actual Effective date: 12/01/2019

Created by: User, Internal
Last Modified by: User, Internal
Pended:

Applicant(s)

Applicant name	Applicant type	Date of birth	Age	Gender
Billy Ohloman	Primary Applicant	01/01/1977	42	Male

Requested coverage

Total monthly premium: \$507.29

Plan name	Plan type	Monthly premium	Adjusted Premium
CareSource Marketplace Standard Silver	HMO	\$507.29	\$507.29

Total Premium

\$507.29

Less tax credit applied

—

Total Monthly cost

\$507.29

[View application](#)[Duplicate check](#)[Pay Now](#)