

The HealthSherpa tools are ready to go. We're just waiting for CMS approval to launch them.
Here's what you can expect and how you can prepare.

With HealthSherpa, you'll be able to:

Request authorization

Send an authorization request directly to your consumer by text or email, in bulk or one by one.

Authorization required

1

Send link

2

ID verification

3

Authorize

To access this application, your client must verify their identity and authorize you to work with them

Text link to (123) 456-1234

Email link to sample@gmail.com

Track authorizations

See which consumers are authorized and which still need follow-up, all from your HealthSherpa account.

Authorizations

75 authorizations are still incomplete for the 2027 plan year

Authorized	Not authorized	Pending authorization
25 View	75 View	0

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Client	Plan year	Authorization status	Last updated	Contact info
☐ John Doe	2027	Not authorized Not started	-	(206) 234-5677 (206) 123-4568
☐ Sharon Jones	2027	Not authorized Event declined	-	(206) 234-5677 Sharon@domain.ca

**Make it easy
for consumers**

Your consumer gets an email or text with a simple authorization flow. If your consumer requires identity verification, they'll complete it during this workflow.

Submit Authorization needed for your 2022 health insurance

 **Mark Smith**

It's fast with your 2022 health insurance agent (agent/portal) and get your authorization.

Help (your first name)

To help with your Marketplace health insurance application, I need your permission to act on your agent's

Submit and Agent can enter

The Marketplace requires you to authorize an agent through this link in order to update your application. Using this link, we request your consent that you authorize this link on your behalf to authorize a third party to act on your behalf to handle a purchase only.

Questions, or want to cancel this authorization? Call me at 616-661-6161.

Tip: Tap the link to authorize Mark Smith to help with your 2022 health insurance.

 **Mark Smith**
Agent/Portal/Insurance

LINKS

MyLifeRate rates may apply. Reply STOP to opt out.

Once a consumer is authorized through HealthSherpa, that authorization can be used for your PY27 enrollment activity on HealthSherpa. If you move a consumer to another platform to enroll, you'll need to obtain authorization again, and you and your consumer will need to use a new and different workflow for authorization and identity verification.