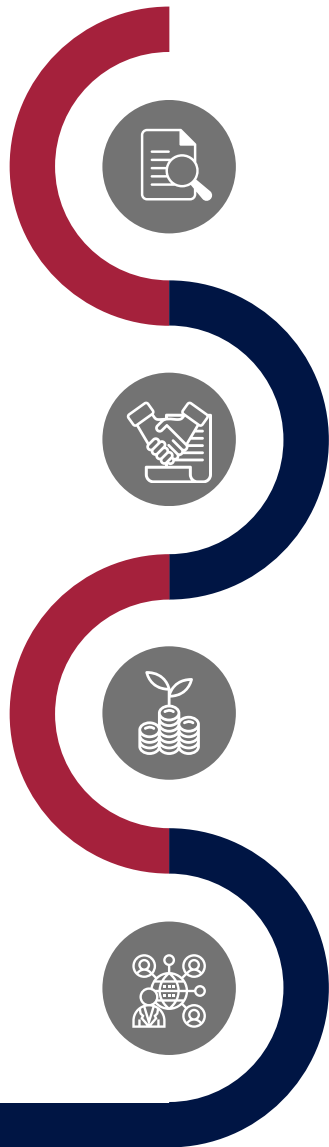




# Checklist for Agents Selling ACA Health Plans

This checklist should help ensure a smooth and effective process for agents selling ACA health plans.



## Checklist for Agents Selling ACA Health Plans

### Pre-Enrollment Preparation

- **Get Certified:** Complete the required ACA certification and training.
- **Understand ACA Plans:** Familiarize yourself with the different ACA plans, their benefits, and coverage options.
- **Know the Market:** Research the target market, including demographics and potential clients.
- **Stay Informed:** Keep updated on any changes or updates to ACA regulations and policies.
- **Gather Resources:** Collect marketing materials, plan brochures, and enrollment guides.

### Client Engagement

- **Identify Prospects:** Use various methods such as referrals, networking, and advertising to identify potential clients.
- **Schedule Appointments:** Arrange meetings with clients to discuss their healthcare needs and options.
- **Assess Needs:** Conduct thorough needs assessments to understand each client's health coverage requirements.
- **Explain Plans:** Clearly explain the different ACA plan options, including benefits, premiums, and out-of-pocket costs.
- **Discuss Subsidies:** Inform clients about potential subsidies and cost-sharing reductions based on their income level.



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## Enrollment Process

- **Assist with Application:** Help clients complete the ACA enrollment application accurately and thoroughly.
- **Verify Information:** Ensure all client information is correct and up-to-date.
- **Review Plan Details:** Go over the chosen plan details with clients to confirm their understanding and satisfaction.
- **Submit Applications:** Submit enrollment applications through the appropriate channels.
- **Follow-Up:** Confirm receipt and acceptance of applications and provide clients with confirmation details.

## Post-Enrollment Support

- **Provide Documentation:** Supply clients with necessary documents, including policy details and contact information.
- **Educate on Usage:** Educate clients on how to use their ACA plan, including accessing care and understanding benefits.
- **Ongoing Support:** Offer continuous support for any questions or issues clients may have with their coverage.
- **Annual Reviews:** Schedule annual reviews to reassess clients' needs and make any necessary changes during open enrollment.

## Compliance and Ethics

- **Maintain Confidentiality:** Ensure all client information is kept confidential and secure.
- **Adhere to Regulations:** Follow all ACA regulations and guidelines strictly.
- **Ethical Conduct:** Conduct business ethically and transparently, prioritizing clients' best interests.
- **Record Keeping:** Keep detailed records of client interactions, applications, and communications.

## Tip for Selling ACA Health Plans

**Highlight the Value of Preventive Services** - When selling ACA health plans, emphasize the importance and value of preventive services included in the coverage. ACA plans are designed to cover a range of preventive services at no additional cost to the policyholder, such as annual check-ups, vaccinations, screenings, and wellness visits. By focusing on these benefits, you can demonstrate how ACA health plans not only provide immediate health coverage but also promote long-term well-being and preventive care.

