InsureSync
A smarter sales software solution

Enrollment Technology solution

InsureSync PRESENTATION

insuresync

What is InsureSync.

InsureSync is an enrollment software solution whereby you can maximize your production by enrolling ACA and Ancillary products at the same time.

InsureSync includes:

- CRM & lead management
- a Certified ACA enrollment platform
- ezAdd Technology^{sm} for Supplemental Insurance

InsureSync is owned by Infinite Spark, LLC (dba InsureSync) and is not the Health Insurance Marketplace website. InsureSync complies with all federal laws including the standards established to protect the privacy and security of personally identifiable information.

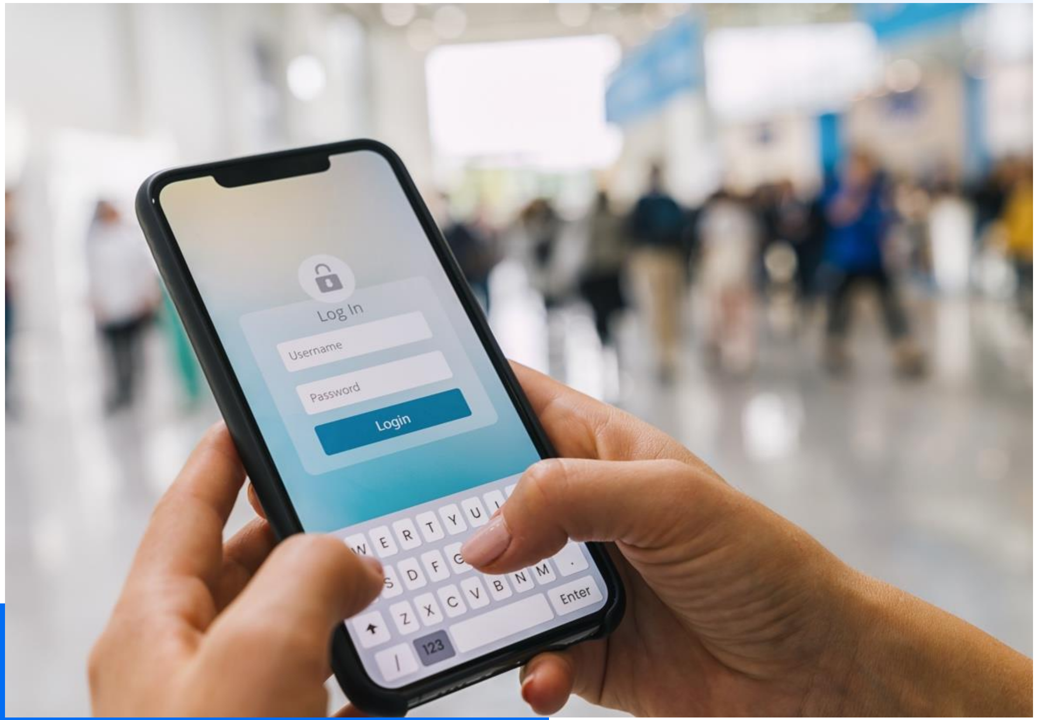
More than enrollment.

- Lead Management (import leads, assign leads, etc)
- Customer Management (pin, add flags, notes, etc)
- User Management (admin areas, sub-users, etc)
- Work Flow Focus (pin and flag customers, jump, etc.)
- Data Filtering (query customers & filter reports, etc)
- Reports (lead, volume, persistency reports, etc)
- Data Export (customer lists, commission data, etc)
- Mail & Email Templates (re-enrollment campaigns, etc)
- Auto-Dial Functionality (tie in digital phone, etc)
- Customization (agency logos, etc)
- ACA Enrollment (certified ACA enrollment)

An introduction to InsureSync.

Let's go over the steps and screenshots of how InsureSync works

- Create your InsureSync Acct
- Get Started – Create Customer Acct
- FFM Eligibility Application
- Adding UBA, HAA or BB Ancillary
- InsureSync Tools
- Need Help



Create your Account with InsureSync.

To get set up to use InsureSync, contact:
Molly Powell, VP of Marketing at
Molly.powell@healthyamerica.biz or
800-964-8331 ext 201

She will request an account to be created from our programmer and you will receive an email to start the set-up process.

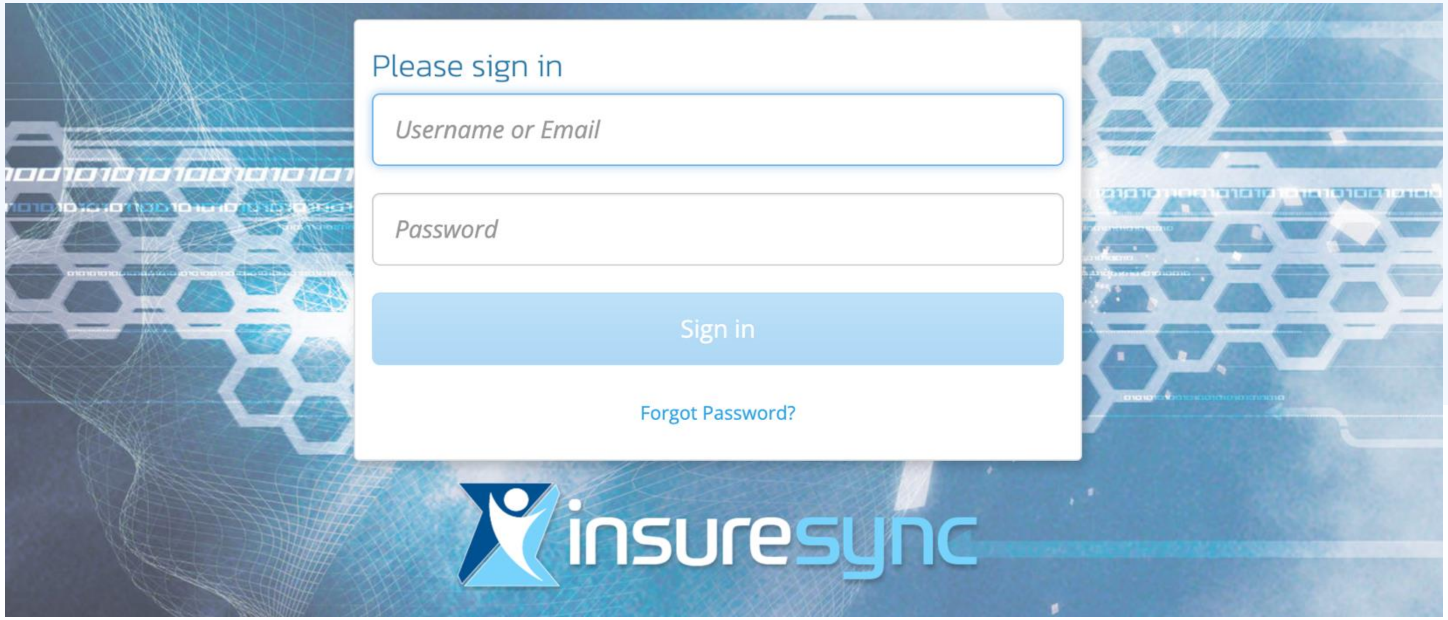
Get New Account

Account Created
Receive Email from Josh
Create Password

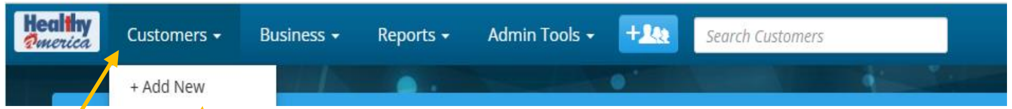
Login to Account

Login with
Username & Password
to get started

You want to set up a customer account to get started.



Create Customer Account in InsureSync



Login to InsureSync Acct

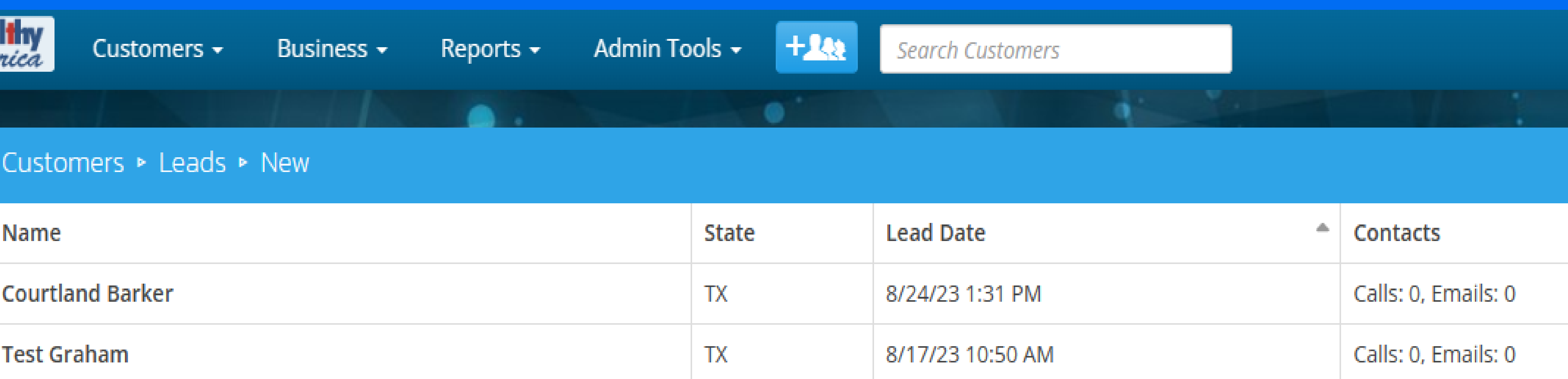
https://hapi.insuresync.net/

Add New Customer

Select Customers Tab and then in the dropdown selection, choose 'Add New' or choose the +with the 3 people sign and then fill out and save

Review ACA Plans

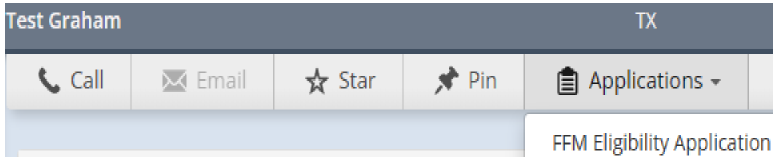
Click the "+ Add Plans" button to view ACA plans available at the normal non-subsidized rates (any APTC subsidy amount will be applied after ACA eligibility app.



Adding Plans.

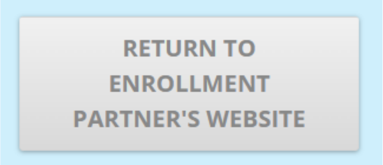
ACA PLANS

Once you return to InsureSync, go to your customer Account. Select 'Applications', then select 'FFM Eligibility Application' if looking to do an ACA plan. It will take you directly to the Healthcare.gov enrollment portal.



Healthcare.gov

On the Healthcare.gov website, you will search for an application, using the data previously obtained while creating your customer account on InsureSync database. **If no match is found, go to: Create A New Application.**



Upon completion of the application, simply return to InsureSync by selecting 'Return to Enrollment Partner's Website'.

What do do next to Add ACA Plans.

Once you are back to your customer account on InsureSync, select the Healthcare.gov tab and you can see the available ACA plans as well as the member's subsidy eligibility incorporated into the plan selection.

Once you have selected your ACA plans, your application submission is nearly complete.

Select Plans & Products

Select the Tabs Plans & Products and then +Add Plans at the top of the page.

HealthCare.gov

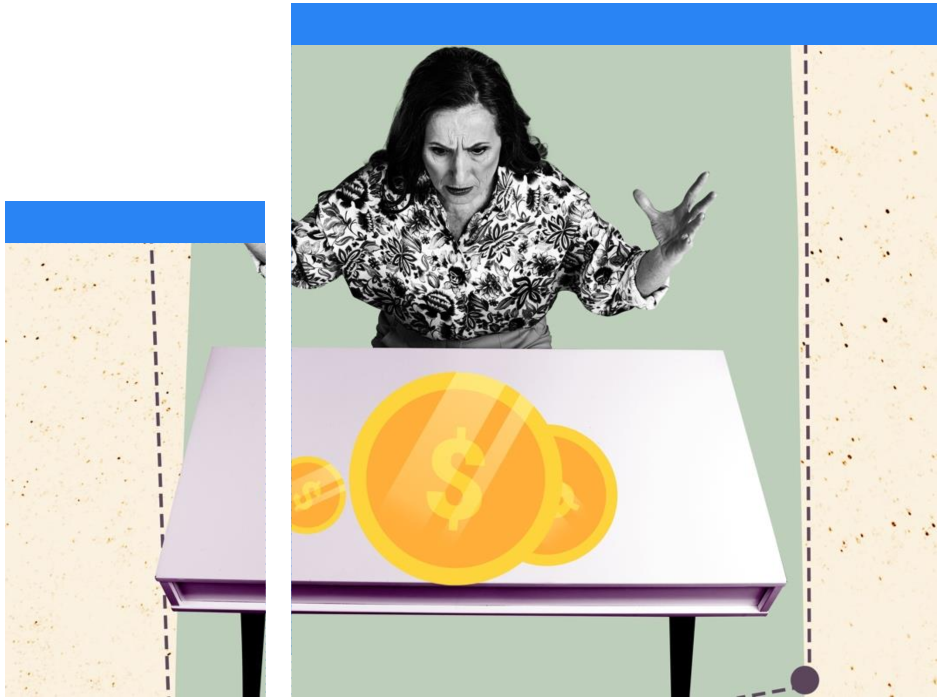
Select Healthcare.gov

Select Healthcare.gov tab on the new window and then select to add the plans available from the healthcare.gov website.

But don’t forget Adding an Ancillary Plan.

Don’t leave money on the table

Supplemental Insurance helps with out-of-pocket medical expenses as well as fills some of the gaps in their health insurance. By adding a supplemental insurance plan or non-insurance Benefit Boost plan, you can help your customer with more benefits and coverage as well as providing additional income in compensation for yourself.



How to Add Ancillary Plans.

Adding Supplemental plans is simple in InsureSync.

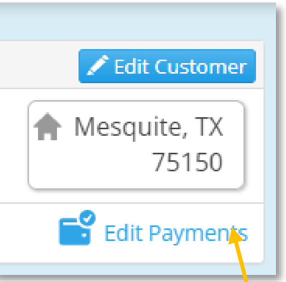
Select Add Plan + Add Plans

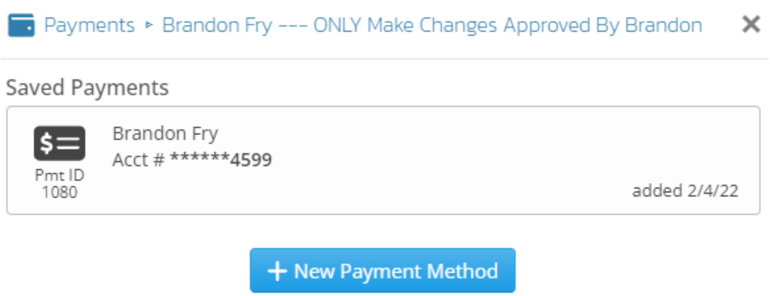
Once you select +Add Plans button, it will bring up the plan selection window. You can choose from the different plan tabs, Healthcare.gov, UBA, HAA, and more if applicable.

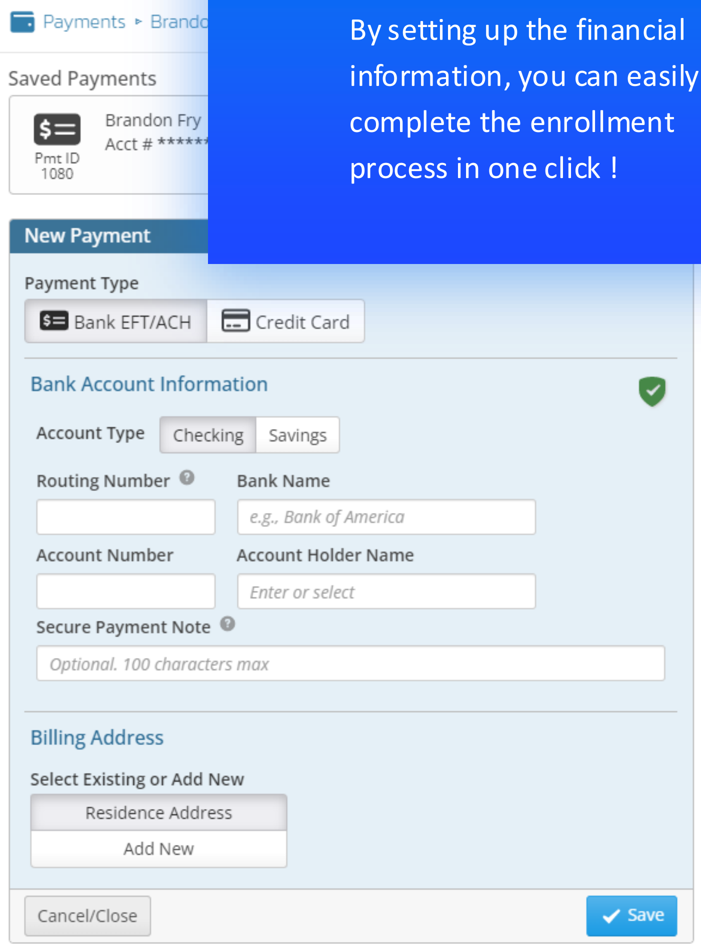
Select Plans from Tabs

Once you open the tab of choice for the supplemental plans, you simply choose the plan or plans that you would like to add.

Set up Member Financial Information.







By setting up the financial information, you can easily complete the enrollment process in one click !

01

Select Edit Payments

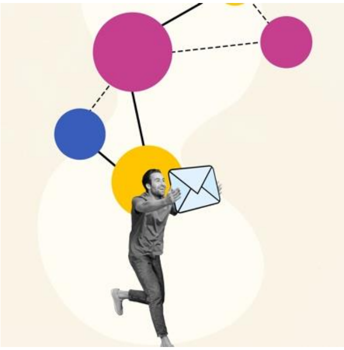
Enter New Payment or Edit previous payment data.

02

Enter Payment Data

You can enter either EFT / Bank Draft or Credit Card info.

Agent InsureSync Tools.



01

Email Templates

Customer Service Tool

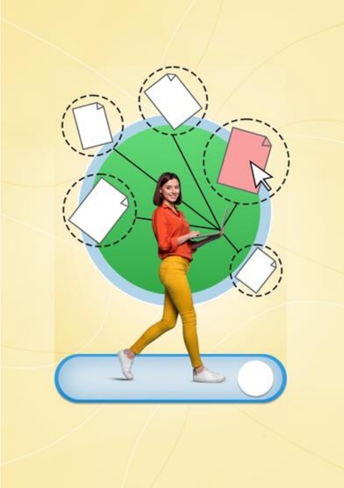
InsureSync has a one click to send email option to your client in your tools.

02

FFM Eligibility

ACA Enrollments

In the Applications tab, there is the link to determine FFM Eligibility.



03

Files and Documents

Customer documents

The Files tab is a great tool to keep all your client's important documents in one secure place. Simply save & upload to client's file.

04

Reminder Flags

Customer Organization Tools

Setting up follow up reminders is a great way to stay organized and not let vital requirements slip through the cracks. Completed flags will automatically roll to history.

Agent InsureSync Tools.

Plans & Products

Call | Email | Star | Pin | Applications | Files | Reminder Flag | Service Flag | Tools

Change Status

- Submitted
- Awaiting Carrier
- Pending
- Awaiting Active
- Active
- NSF
- Cancelled
- Cancelled-Closed
- Declined
- Expired
- Incomplete

05

Plans & Products

Customer Plan Overview

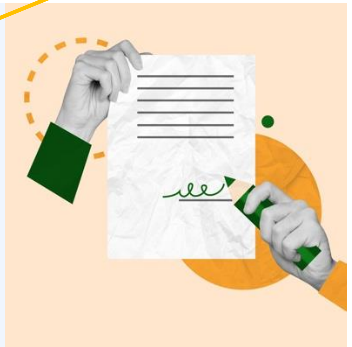
InsureSync shows the agent client's selected plans and products. (Multiple plans shown)

06

Application Status

Customer Status Changes

Under Plans & Products tool, you can change the status of the member.



07

Edit Function

Customer Changes

To make changes with customer information such as name, address, date of birth, email, dependent information, you can use the Edit function. With Plan History, you can see the changes of the account.

08

Pin or Star Tools

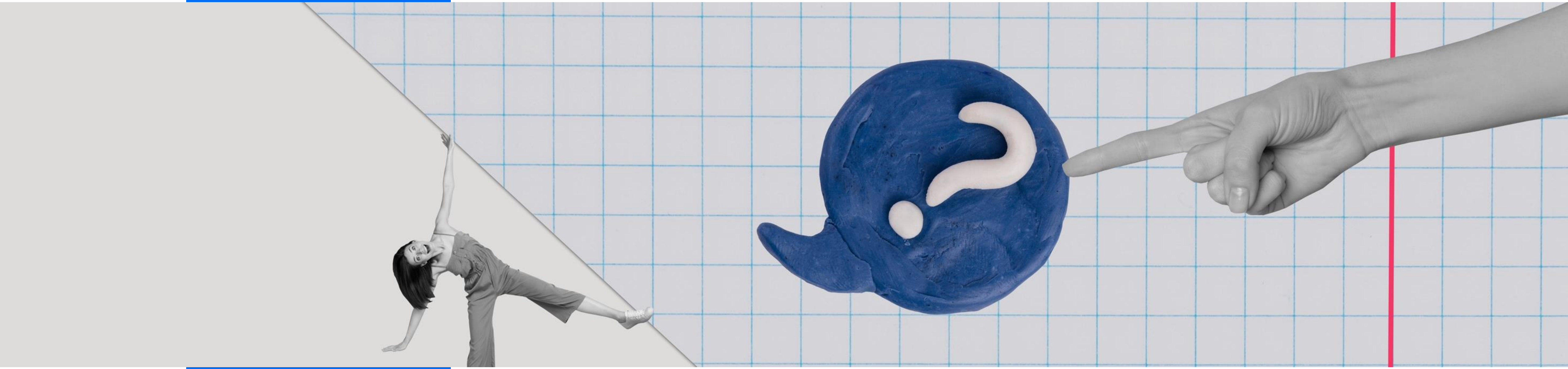
Customer Organization Tools

With the Pin or Star tool, you can select these functions to help you keep things near the top like clients you are currently working on and more.

Edit Customer

Plan History

Insure Sync contact.



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GET IN TOUCH

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molly.powell@healthyamerica.biz

Ask Molly Powell about Demo

Thank you.

For learning more about a new enrollment option

INSURESYNC PRESENTATION