insuresync

A Smarter Sales Software Solution

What is insuresync?

Lead Management
Import & upload Leads populating info on lead like name, address, etc. Assign Leads to users in your sub-group.
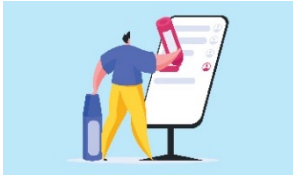
Customer Management
Pin, add flags, notes & documents to customer as well as record number of phone calls to customers.
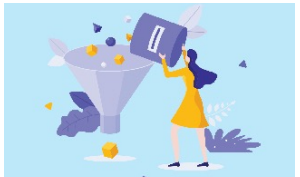
User Management
Admin areas to set up user sub-agents and logins as well as authorize and select products available to user.

Work Flow Focus
Pin and flag customers. Utilize the Jump feature as well as add contact reminders to customers.

Data Filtering
Query customer data to narrow any list of customers or enrollments. Filtering is also available for reports.

Reports
Admins have Access to Lead, Volume and Persistency Reporting for all agency sub-producers.
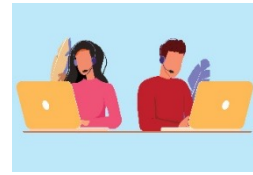
Data Export
Export Commission Data to your Agency Commission Pay System. You can also export customer lists.

Mail & Email Templates
Conduct Mail or Email Campaigns (like re-enrollments for ACA) or send personal letters direct from InsureSync.

Auto-Dial Functionality
Tie in your digital phone dialing function to call directly from the imported lead in InsureSync saving the agent time.

Customization
Add agency company logos and customization to have a more personalized agency experience.

NO FEE – Your fees are WAIVED!
Although Infinite Spark, LLC charges a very affordable monthly Agency and User fees – **Healthy America Agents fees are WAIVED!**

ACA Enrollment
Seamless ACA Enrollment process. Complete a certified ACA enrollment from eligibility to finished application on the platform.

Introduction to insuresync

- **Create Your InsureSync Account**

- **Get Started - Create a Customer Account**

- **FFM Eligibility Application**

- **Adding UBA, HAA or Benefit Boost Ancillary Plans**

- **InsureSync Tools**

- **Need Help?**
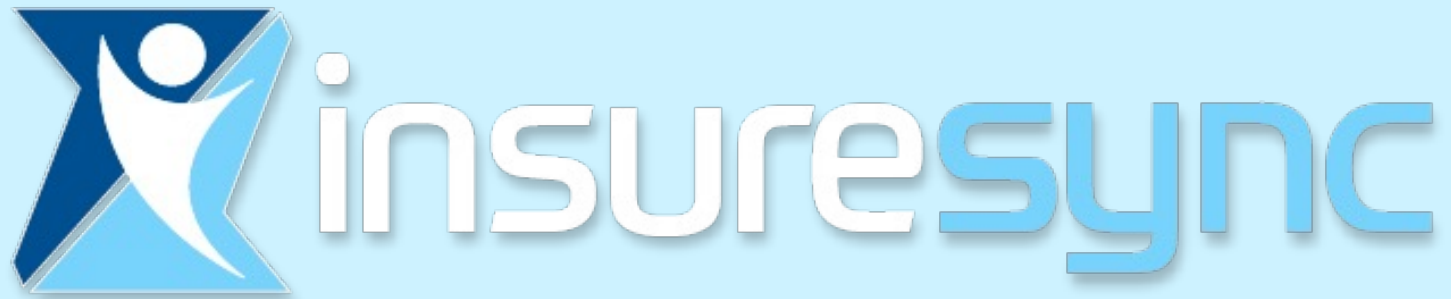
Creating Your InsureSync Account

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Create Your InsureSync Account

Contact: Rachelle Graham
         Business Development

rachelle.graham@healthyamerica.biz
1-800-964-8331 Ext 202

1. Your account will be created on your behalf
2. You will receive an email to set up your password
3. Log in and GET STARTED!

IT REALLY IS THAT SIMPLE!

Creating a Customer Account

Get Started - Create a Customer Account

- Log in to your InsureSync account: https://hapi.insuresync.net/

  - Customers (Drop down tab) Select "+ Add New"
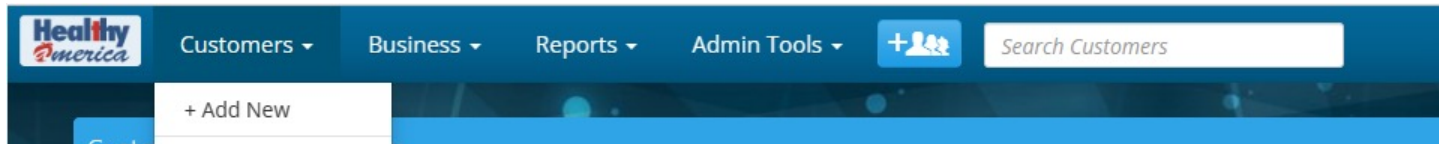
  - Or

    - Complete fields & save

- If your Customer is interested in a Marketplace plan, go to:
  www.healthcare.gov/see-plans/#/
  Review plan options and select plan based on your customer's needs.
  (Hint: Copy the plan name before continuing)

Adding Plans

- Return to InsureSync
- Go to your customer account
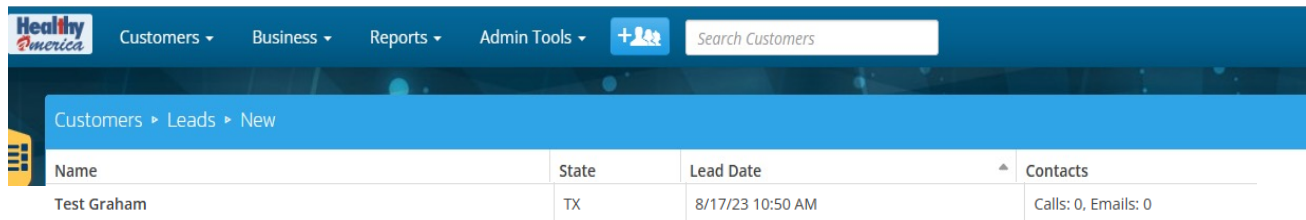
- The 'Applications', then 'FFM Eligibility Application' will take you directly to the Healthcare.gov enrollment portal
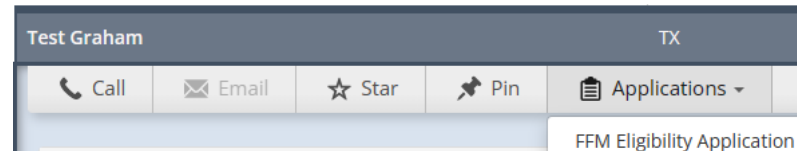
- On the Healthcare.gov website you will search for application, using the data previously obtained while creating your customer account on InsureSync database
  - If no match is found, go to: create a new application

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

Adding Plans

- You are now back to your customer account on InsureSync

- Select **Plans & Products** - **+ Add Plans** tab at the top of the page

- Select **HealthCare.gov** on the new window
  - Select to add the plan selected from the healthcare.gov website

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Don't forget the UBA or HAA GAP plans!

The ACA applications submission is now complete!

BUT WAIT! There is MORE!

Click **+ Add Plans** to bring up the plan window

and select the UBA or HAA drop down tab

HealthCare.gov | UBA UNITED BUSINESS ASSOCIATION | HAA Healthy America Association | Manual Entry

Adding the desired Gap plans **are just a click away!**

All your client's plan information is in one convenient location!

Set Up Financial Information

This tool allows you to enter or edit the client's payment information
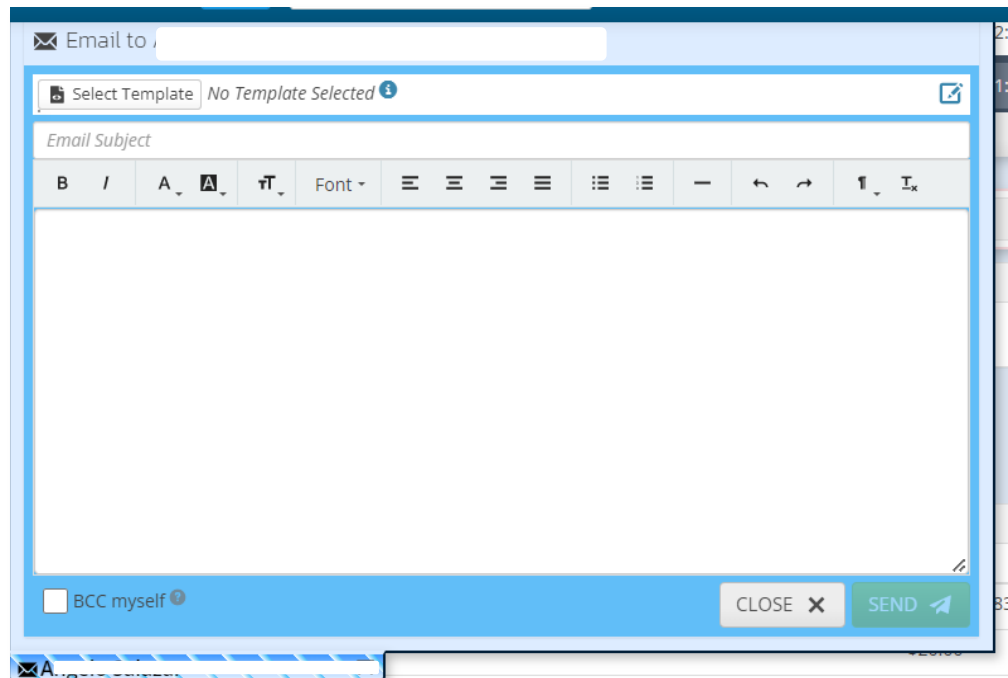
Tools for your Success

Tools - Email Option

Email Option

One click to send email to your client

Tools - Applications

- Applications
  - FFM Eligibility Application
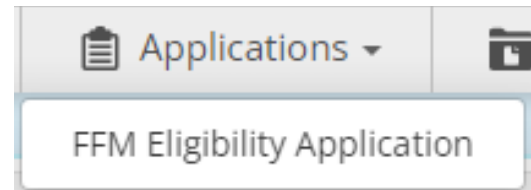
Direct link to Healthcare.gov enrollment portal

Tools - Files

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

Files

A great tool to keep all your client's important documents in one secure place!
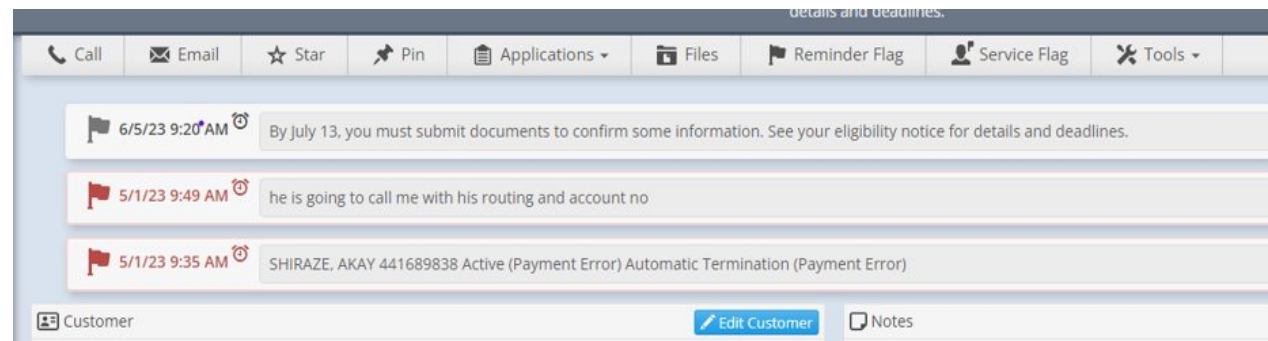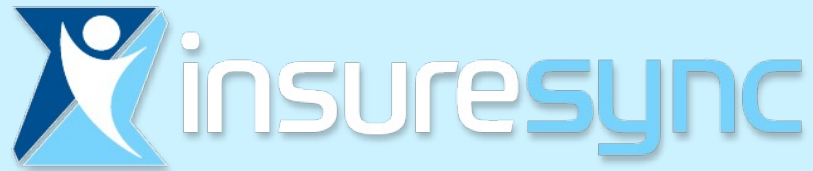Simply save and upload to the client's file!

Tools – Reminder Flag

Reminder Flag

Setting follow up reminders is a great way to stay organized and not let those vital requirements slip through the cracks!

Note: Completed flags will automatically roll to history

Tools – Plans and Products

Plans & Products

This feature will show you all of your client's selected multiple plans and products (Maj Med, Gap, Dental, Vision ,etc.)

Plans & Products

ID	Type	Carrier/Co	Name
107656	MM (FFM)	CHC	Community Premier Gold 021 No Deductible for PCP Specialists Generics Free 247 Telehealth
107655	GAP (UBA)	UBA	Gap Term
107654	GAP (UBA)	UBA	Gap 10000
107653	BOOST (UBA)	UBA	Walmart Health Virtual Visits
107652	MEMBERSHIP (UBA)	UBA	UBA Membership

Tools - Changing Application Status

- Go to: Plans & Products tool
- Click on Change Status
- Select appropriate status
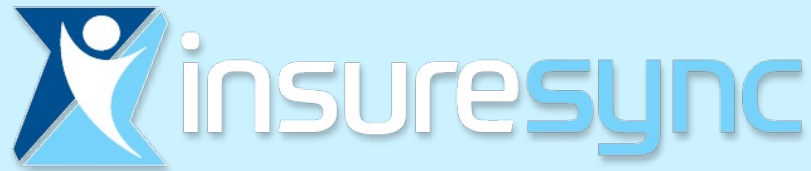- Don't forget to set a Reminder Flag!
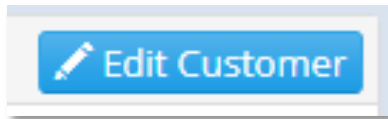
Plans & Products
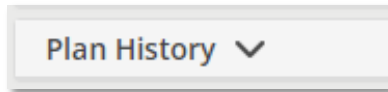
Change Status ▾

Reminder Flag

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

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Even More Helpful Tools

Edit Customer

To make changes or edit customer information such as: name, address, DOB, email, dependent information etc.

Plan History ⌄

With this important tool, can see changes to the status of the account

Need Help?

Rachelle Graham
Business Development

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