

ACA Final Status & Readiness Summary

Complete before your TFG final review. Type directly into the fields below.

AGENT INFORMATION

Full Name	
NPN	
Resident State	
Licensed States	

FFM / CMS STATUS

FFM Completed	Yes	No
FFM Plan Year		
FFM Certificate Saved	Yes	No

CONTRACTING

Contracting Completed	Yes	No
Additional Requirements Completed	Yes	No
Carrier Appointments Confirmed		
Approved States		

HEALTHSHERPA

HealthSherpa Active	Yes	No
Agency Code 3c26 Used	Yes	No
FFM Integrated	Yes	No
EDE Completed	Yes	No
Licensed States Added	Yes	No
Carrier Settings Completed	Yes	No

TRAINING

TFG ACA Training	Completed	Pending
ACA Script Practiced	Completed	Pending
HealthSherpa Training	Completed	Pending
Toolkit Reviewed	Yes	No

FINAL VERIFICATION

RTS Confirmed (state / carrier)	
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Ready-to-Sell Checklist

Check off each item as you confirm it. This mirrors Phase 26 of the ACA Onboarding Roadmap.

Active license	TFG ACA Training completed
Correct NPN	ACA Script practiced
Required state licenses	HealthSherpa active
Benavest / Time Financial Group LLC contracting submitted	Agency code 3c26 completed
Carrier references reviewed	FFM integrated
Blackout periods reviewed	EDE/identity setup completed
Toolkit reviewed	Licensed states added
Carrier contracts completed	Carrier settings completed
Carrier appointments confirmed	HealthSherpa training completed
FFM completed	State Marketplace requirements completed
CMS agreements completed	State/carrier RTS verified
FFM certificate saved	TFG final review completed