



# Creating a HealthSherpa Account



To create a HealthSherpa account go to [www.HealthSherpa.com](http://www.HealthSherpa.com), or click on this [link](#).

It's, fast and easy and shouldn't take you more than 3-4 mins.

Once you see the 'sign up' page, enter an email address and password.

Your email will be your HealthSherpa login.

## Sign up for a free agent account

Process enrollments and renewals, manage leads and strengthen your overall business with the power of HealthSherpa's Agent Tools behind you.



EMAIL

PASSWORD

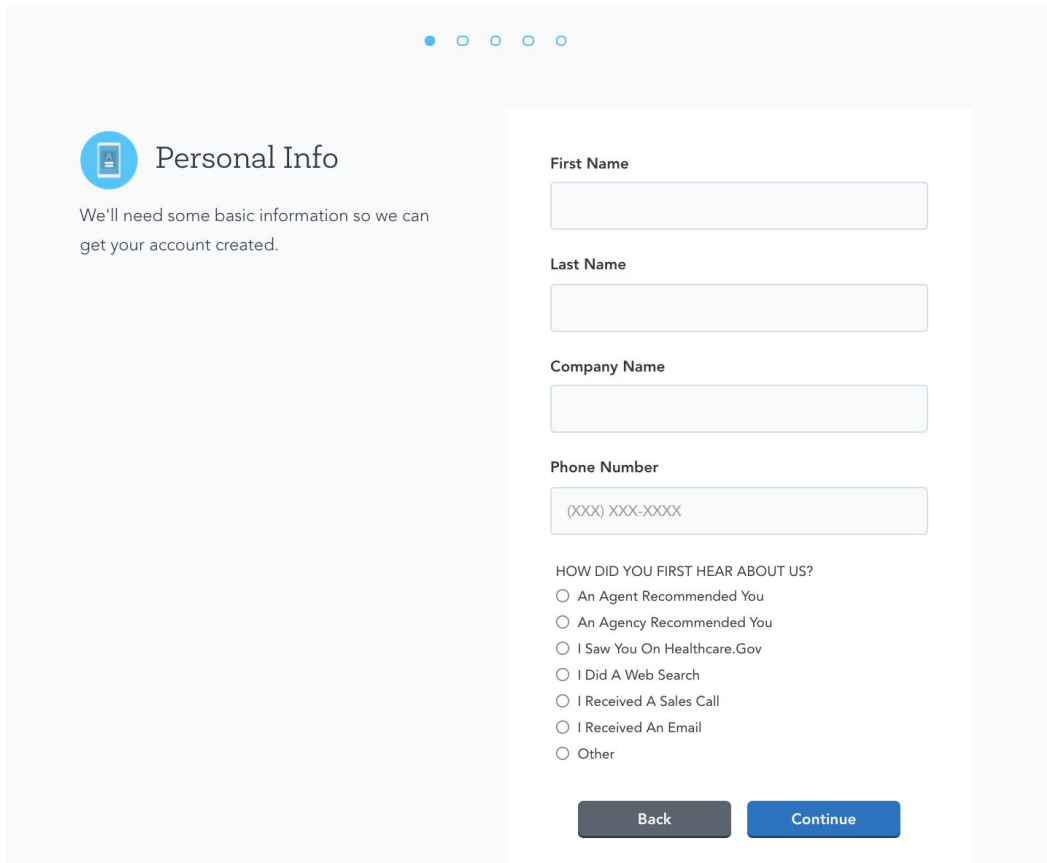
Show

Sign Up

By signing up, you attest that you agree with our [Terms of Service](#), and consent to receiving emails from HealthSherpa.

Next you'll start to enter in your information.

- Name
- Company / Agency Name
- Preferred Contact #
- How did you hear about us?



The screenshot shows a registration form titled "Personal Info" with a blue circular icon containing a person silhouette. Below the title is the text: "We'll need some basic information so we can get your account created." The form contains several input fields: "First Name", "Last Name", "Company Name", and "Phone Number" (with a placeholder "(XXX) XXX-XXXX"). Below these fields is a section titled "HOW DID YOU FIRST HEAR ABOUT US?" with six radio button options: "An Agent Recommended You", "An Agency Recommended You", "I Saw You On Healthcare.Gov", "I Did A Web Search", "I Received A Sales Call", and "I Received An Email", plus an "Other" option. At the bottom are two buttons: "Back" (grey) and "Continue" (blue).

**Personal Info**

We'll need some basic information so we can get your account created.

**First Name**

**Last Name**

**Company Name**

**Phone Number**

**HOW DID YOU FIRST HEAR ABOUT US?**

An Agent Recommended You

An Agency Recommended You

I Saw You On Healthcare.Gov

I Did A Web Search

I Received A Sales Call

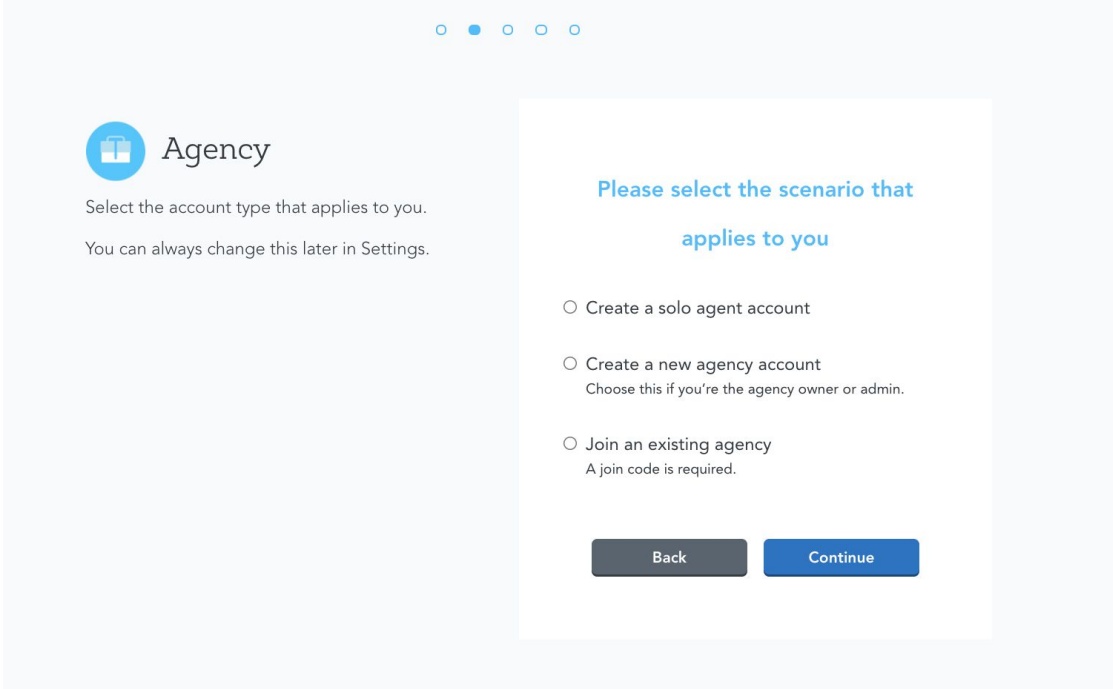
I Received An Email

Other

**Back** **Continue**

Select the type of account you'd like to open:

- Solo independent agent
- Agency Account
- Agent joining an existing agency (downline agent)
  - Will require a 'join code'



The screenshot shows a user interface for selecting an account type. At the top right, there are five small circles, with the second one from the left filled in blue. Below this is a section titled "Agency" with a blue circular icon containing a white building. The text reads: "Select the account type that applies to you. You can always change this later in Settings." To the right of this section is a white box with a blue header: "Please select the scenario that applies to you". Below the header are three radio button options: "Create a solo agent account", "Create a new agency account" (with a sub-note: "Choose this if you're the agency owner or admin."), and "Join an existing agency" (with a sub-note: "A join code is required."). At the bottom of the white box are two buttons: a dark grey "Back" button and a blue "Continue" button.

## 1. Solo Agent > Licenses and Appointments

### Carriers

You can always add or edit these later from your Settings page.

Add any states you're licensed in, then select any carriers you're appointed with

Back

Continue

## 2. Agency Account > Agency Information

### Agency

By creating an agency account, you are designated as the Agency Admin on the account. Other agents will be able to join the agency and you'll be able to view everyone who has joined. The agents that join will only see that they are members of this Agency.

The agency admin cannot be changed once the agency is created.

Agency Name

Agency Phone

Back

Continue

## 3. Join an existing agency > Enter Agency Join code

### Agency

Enter the JOIN code you received in order to join an Agency with a HealthSherpa account.

If you don't have it handy, you can always do this later under your account settings.

- Any agency you join will be able to **view & export** your Clients and Leads.
- If the agency you join is downline from other agencies, those other agencies will be able to **view and export** your Clients and Leads.

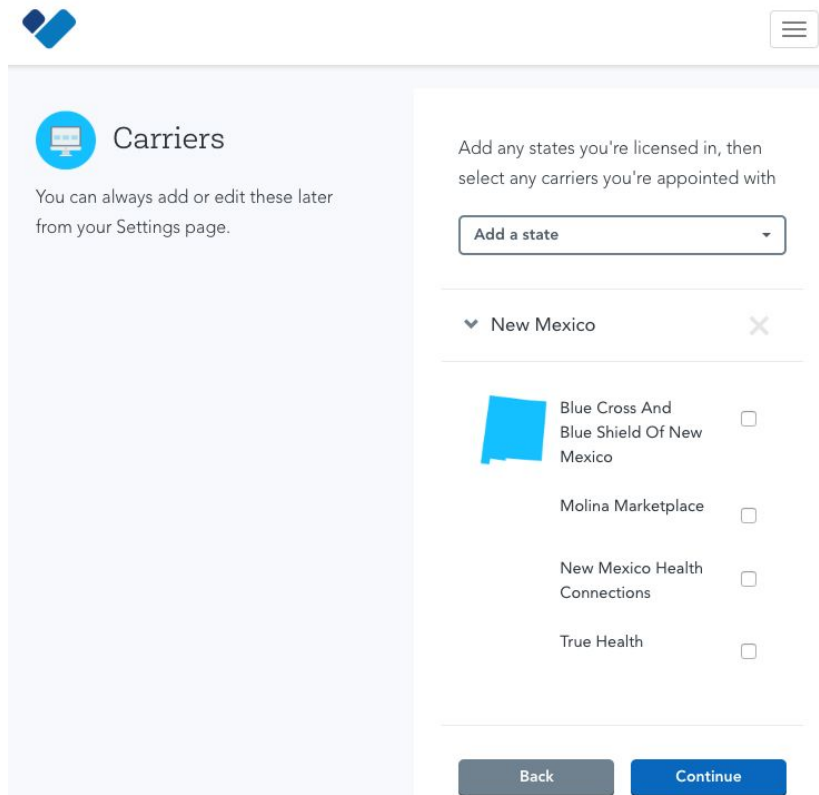
Join Code

Back

Continue

## State licenses and Carrier Appointments

1. Select all the states you're licensed in
  2. Select all the carriers you're appointed with
- **NOTE:** It's very important that this is accurate and up-to-date at all times to ensure your applications are submitted correctly.



The screenshot shows the 'Carriers' settings page in the HealthSherpa interface. At the top left is the HealthSherpa logo, and at the top right is a hamburger menu icon. The main heading is 'Carriers' with a computer monitor icon. Below the heading is a note: 'You can always add or edit these later from your Settings page.' The page is divided into two main sections. The left section is for selecting states, with a dropdown menu currently set to 'Add a state'. The right section is for selecting carriers, with a dropdown menu currently set to 'New Mexico'. Under 'New Mexico', there are four carrier options, each with a checkbox: 'Blue Cross And Blue Shield Of New Mexico', 'Molina Marketplace', 'New Mexico Health Connections', and 'True Health'. At the bottom of the page are two buttons: 'Back' and 'Continue'.


### Carriers

You can always add or edit these later from your Settings page.

Add any states you're licensed in, then select any carriers you're appointed with

Add a state

▼ New Mexico ✕

-  Blue Cross And Blue Shield Of New Mexico
- Molina Marketplace
- New Mexico Health Connections
- True Health

Back Continue

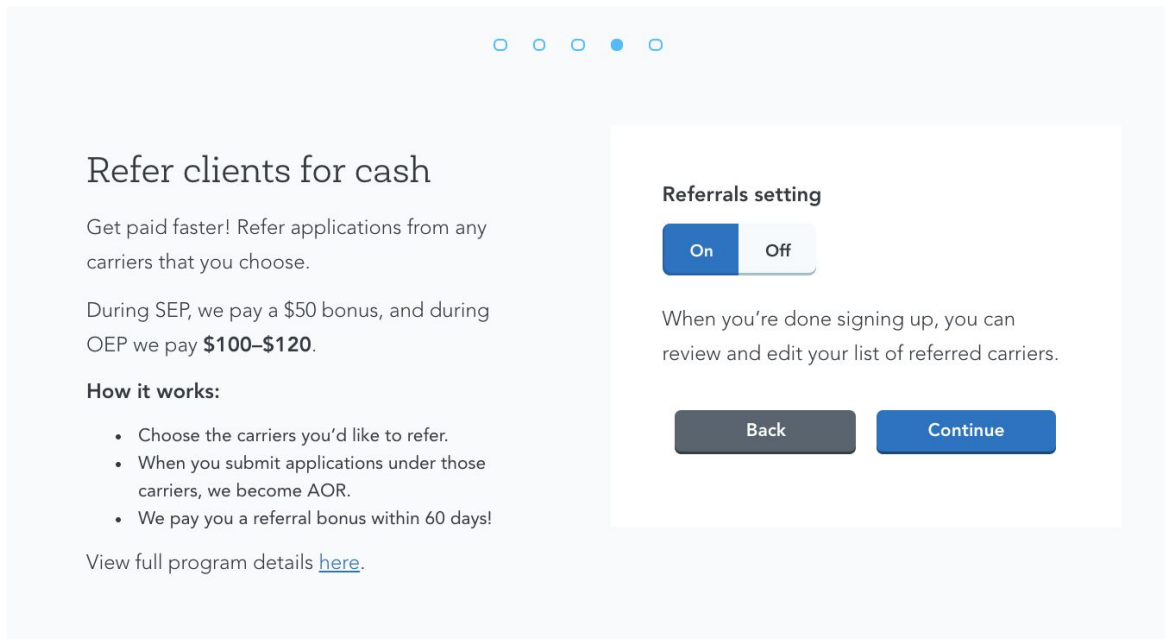


## Referral Program

With HealthSherpa's referral program, you can choose what applications you'd like to refer for a one-time fee.

For more information, [click here](#).

**Note:** Every year a referral is actively renewed a new referral fee is paid.

A screenshot of a web interface for the HealthSherpa referral program. At the top right, there are five small circles, with the fourth one from the left filled with blue, indicating the current step. The main heading is "Refer clients for cash". Below it, the text says "Get paid faster! Refer applications from any carriers that you choose." and "During SEP, we pay a \$50 bonus, and during OEP we pay \$100-\$120." A section titled "How it works:" contains a bulleted list: "Choose the carriers you'd like to refer.", "When you submit applications under those carriers, we become AOR.", and "We pay you a referral bonus within 60 days!". At the bottom of this section is a link "View full program details here." To the right, there is a "Referrals setting" panel with a toggle switch currently set to "On" (the "On" button is blue, the "Off" button is white). Below the toggle, it says "When you're done signing up, you can review and edit your list of referred carriers." At the bottom of the panel are two buttons: "Back" (grey) and "Continue" (blue).



## Joint Marketing Agreement

If you opt into the 'referral program', you'll come across our Joint Marketing Agreement (JMA). Please read, review and accept the terms to participate in the program.

To enable referrals, please review and accept these terms.

### JOINT MARKETING AGREEMENT

CAREFULLY READ THE FOLLOWING JOINT MARKETING AGREEMENT ("AGREEMENT"). BY CLICKING ON THE "I ACCEPT" BUTTON, YOU ACKNOWLEDGE THAT YOU HAVE READ AND ACCEPT THE TERMS AND CONDITIONS OF THIS AGREEMENT IN ITS ENTIRETY AND ARE CONSENTING TO BE BOUND BY AND ARE BECOMING A PARTY TO THIS AGREEMENT. IF YOU DO NOT AGREE TO ALL OF THE TERMS OF THIS AGREEMENT, DO NOT CLICK THE "I ACCEPT" BUTTON. THIS AGREEMENT IS EFFECTIVE AS OF THE DATE YOU CLICK "I ACCEPT"

Please contact us at [agent\\_support@healthsherpa.com](mailto:agent_support@healthsherpa.com) or (888) 684-1373 for any queries.

This JOINT MARKETING AGREEMENT is by and between you ("Partner") and Geozoning, Inc. doing business as HealthSherpa Insurance Agency with an office and principal place of business located at 244 Kearny St, Suite 800 San Francisco, CA 94108 ("HealthSherpa"). Each of Partner and HealthSherpa is a "Party" to this Agreement; collectively, Partner and HealthSherpa are the "Parties" to this Agreement.

NOW, THEREFORE, in exchange for the mutual promises made herein, and for other good and valuable consideration, the Parties, intending to be legally bound, agree as follows:

Click here to indicate that you have read and agree to the terms of the Joint Marketing Agreement

I ACCEPT





## CMS/FFM Username and NPN

Enter your FFM username (this is the same username you use to log into [portal.cms.gov](https://portal.cms.gov))

Enter in your individual NPN. This NPN will go on every application upon submission, therefore it should be the one that is appointed with your carriers.

A screenshot of a web form titled "Compliance". The form is set against a light blue background with a window-like header containing five small circles, the last of which is filled. On the left, there is a blue circular icon with a white document symbol. The text "Compliance" is in a large, bold, blue font. Below this, there are two paragraphs of text: "This information is needed in order to verify compliance and to make sure the carrier sees you on enrollments from the exchange." and "Your FFM Username is the same login name you use when logging into portal.cms.gov." A blue link reads "Not FFM certified? Try our refer-only account". On the right side of the form, there are two input fields. The first is labeled "FFM Username (Forgot username?)" and the second is labeled "NPN (Forgot npn?)". Below these fields are two buttons: a dark grey "Back" button and a blue "Continue" button.



Authorizing HealthSherpa to run a National Insurance Producer Registry (NIPR) check

## We need to perform a NIPR check

CMS requires us to verify your licensure in the State in which your client is selecting a QHP. In order to do this, we seek Producer Database reports through NIPR.

### This will tell us:

- Which states you're licensed in.
- Whether any regulatory actions against your license have been reported.



I authorize HealthSherpa to procure reports related to my NPN through NIPR now and in the future.

Submit authorization



Congratulations!! You've opened up your HealthSherpa Account!

Now let's enable 'EDE'!!

Downline Agent | Downline Agent NPN: 17169718 | [Enable EDE](#) | [Start application](#) | [Search Marketplace](#) | [Quote On-Ex](#) | ? | ⚙️

**Clients** |

**Take us for a spin!** | [↑ Import](#)

<input type="checkbox"/>	Client	Plan	Premium	Effective	Created	Documents	Payment	Actions
<input type="checkbox"/>	<a href="#">Jane (Example client)</a>	HealthNet Silver HMO 2020	\$138	07/01/2021	06/29/2021	<span>🟡 Processing</span>	<span>🔴 Action needed</span>	<a href="#">View</a>

This is an example client — your clients will appear here after you've submitted or imported an application



# EDE-enable

Enable EDE to get the most out of your HealthSherpa platform and maximize your ACA production



## What is Enhanced Direct Enrollment?

EDE is a CMS technology. Enhanced Direct Enrollment allows HealthSherpa to fully integrate with HealthCare.gov to submit applications without being redirected to HealthCare.gov.

With HealthSherpa's faster and easier alternative to HealthCare.gov, you'll have the leading-edge technology you need to maximize your Marketplace experience.

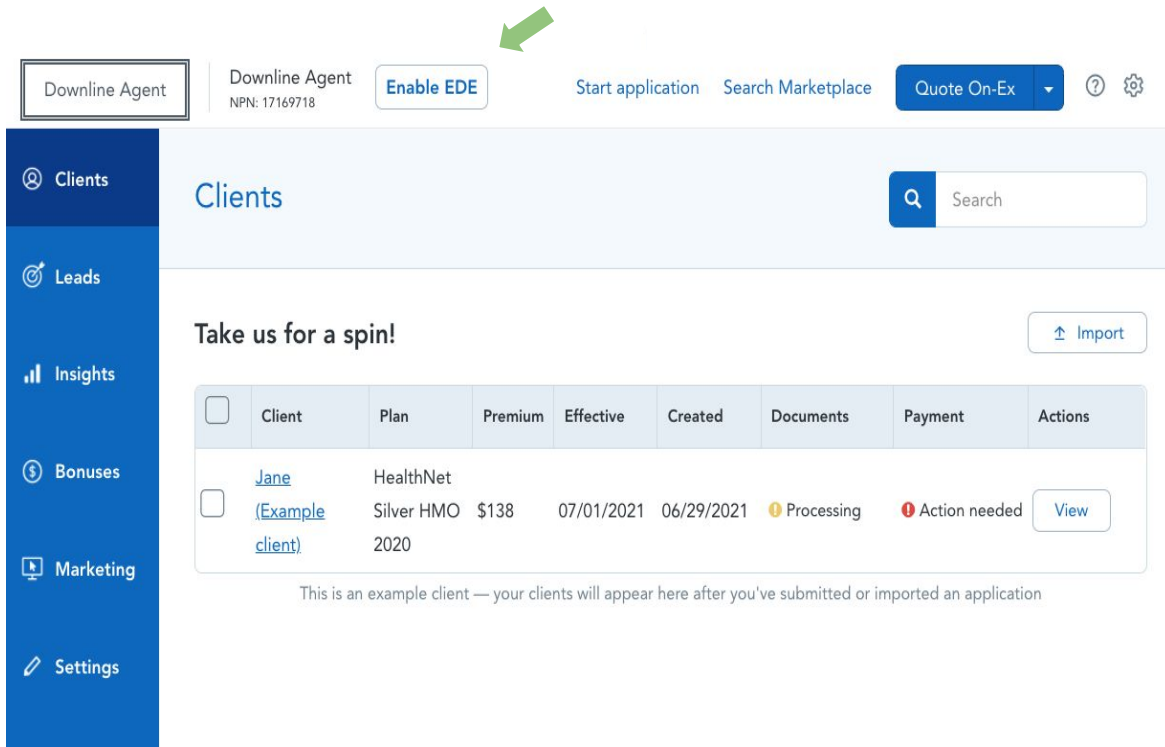
The screenshot shows the HealthSherpa user interface. At the top, there is a navigation bar with the following elements: a 'Downline Agent' dropdown menu, the text 'Downline Agent NPN: 17169718', a button labeled 'Enable EDE' (highlighted with a green arrow), 'Start application', 'Search Marketplace', and a 'Quote On-Ex' dropdown menu. Below the navigation bar is a sidebar with menu items: 'Clients', 'Leads', 'Insights', 'Bonuses', 'Marketing', and 'Settings'. The main content area is titled 'Clients' and includes a search bar. Below the search bar is a section titled 'Take us for a spin!' with an 'Import' button. A table displays a single client record:

<input type="checkbox"/>	Client	Plan	Premium	Effective	Created	Documents	Payment	Actions
<input type="checkbox"/>	<a href="#">Jane (Example client)</a>	HealthNet Silver HMO	\$138	07/01/2021	06/29/2021	<span>Processing</span>	<span>Action needed</span>	<a href="#">View</a>

Below the table, a note states: 'This is an example client — your clients will appear here after you've submitted or imported an application'.

## Enable EDE to:

- Complete applications on HealthSherpa directly
- Quickly effectuate plans with document upload / direct payment links
- View required documents, and payment status without having to redirect to Healthcare.gov
- View and print 1095 A forms and eligibility letters and much more!

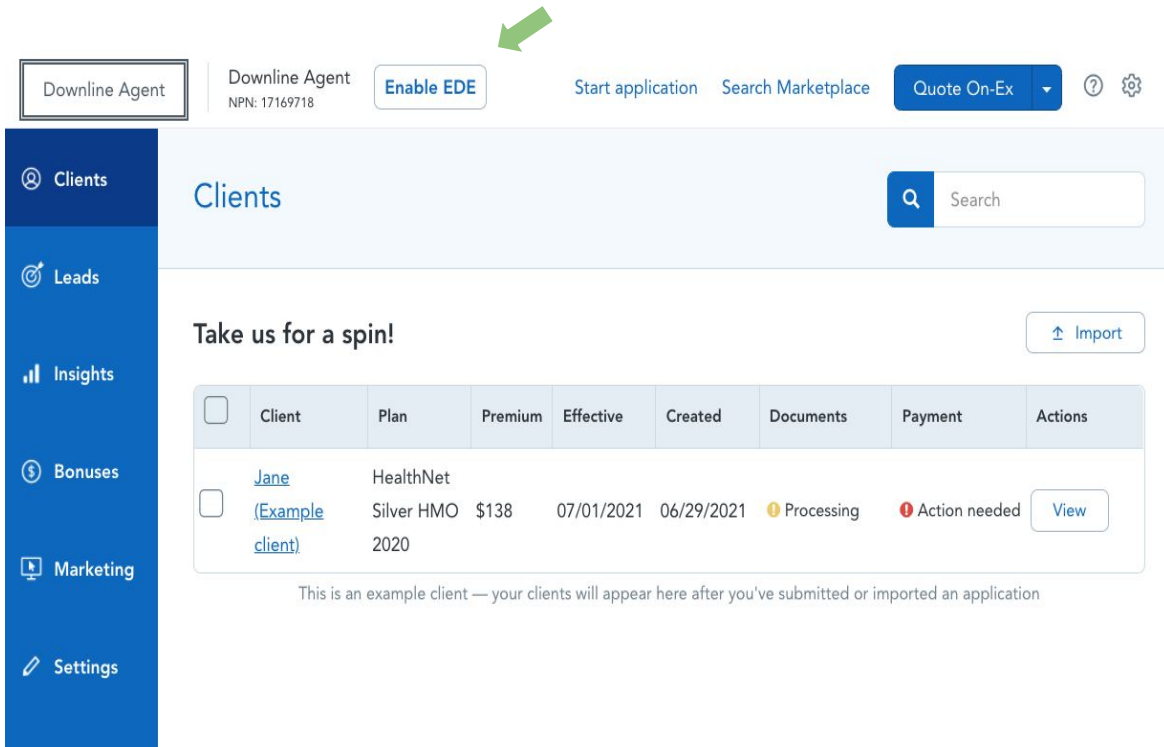


The screenshot shows the HealthSherpa user interface. At the top, there is a header with the 'Downline Agent' label and the NPN number '17169718'. A green arrow points to the 'Enable EDE' button. To the right of this button are links for 'Start application', 'Search Marketplace', and a 'Quote On-Ex' dropdown menu. Below the header is a navigation sidebar with options: Clients, Leads, Insights, Bonuses, Marketing, and Settings. The main content area is titled 'Clients' and includes a search bar. Below the search bar is a section titled 'Take us for a spin!' with an 'Import' button. A table displays a list of clients with columns for Client, Plan, Premium, Effective, Created, Documents, Payment, and Actions. The table contains one row for an example client: Jane (Example client), HealthNet Silver HMO 2020, with a premium of \$138, effective date of 07/01/2021, and created on 06/29/2021. The status is 'Processing' and 'Action needed'. A 'View' button is present in the Actions column. Below the table, a note states: 'This is an example client — your clients will appear here after you've submitted or imported an application'.

<input type="checkbox"/>	Client	Plan	Premium	Effective	Created	Documents	Payment	Actions
<input type="checkbox"/>	<a href="#">Jane (Example client)</a>	HealthNet Silver HMO 2020	\$138	07/01/2021	06/29/2021	<span>Processing</span>	<span>Action needed</span>	<a href="#">View</a>

## How to enable Enhance Direct Enrollment (EDE):

- Click on 'Enable EDE'
- Next, ID verification process



Downline Agent

Downline Agent  
NPN: 17169718

**Enable EDE**

Start application Search Marketplace Quote On-Ex

Clients

Search

Take us for a spin! Import

<input type="checkbox"/>	Client	Plan	Premium	Effective	Created	Documents	Payment	Actions
<input type="checkbox"/>	<a href="#">Jane (Example client)</a>	HealthNet Silver HMO	\$138	07/01/2021	06/29/2021	Processing	Action needed	<a href="#">View</a>

This is an example client — your clients will appear here after you've submitted or imported an application

## Verifying your identity

- This will take you to a page to verify your identity - you will enter your contact information here and then click "Continue".

**Verify your identity**

CMS requires every agent verify their identity in order to use the Enhanced Direct Enrollment (EDE) pathway. [Learn more](#)

Your contact information

First name	Middle	Last name	Suffix
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="S..."/>

Date of birth	Social security number
<input type="text" value="mm/dd/yyyy"/>	<input type="text" value="xxx-xx-xxxx"/>

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Contact information

Street address	Apt. / Ste. (Optional)
<input type="text"/>	<input type="text"/>

City	State	Zip code
<input type="text"/>	<input type="text" value="Select"/>	<input type="text"/>

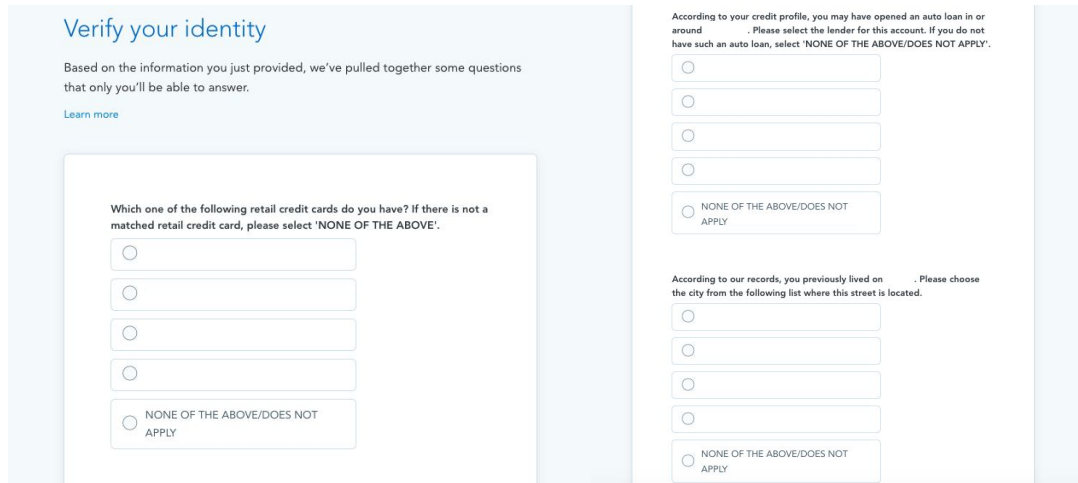
Phone number



## Verifying your identity

- This will then pull up the ID proofing questions based on personal credit history through CMS' partner, Experian.

*Please note: These questions are pulled from the information provided, answer with your own information not information about your business.*



**Verify your identity**

Based on the information you just provided, we've pulled together some questions that only you'll be able to answer.

[Learn more](#)

Which one of the following retail credit cards do you have? If there is not a matched retail credit card, please select 'NONE OF THE ABOVE'.

NONE OF THE ABOVE/DOES NOT APPLY

According to your credit profile, you may have opened an auto loan in or around . Please select the lender for this account. If you do not have such an auto loan, select 'NONE OF THE ABOVE/DOES NOT APPLY'.

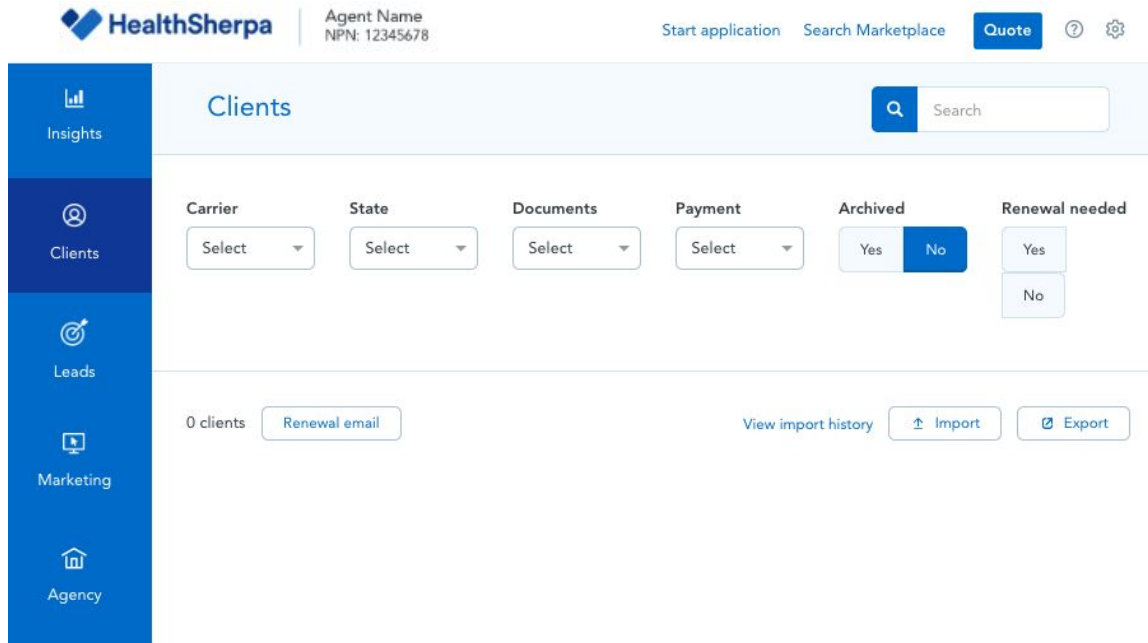
NONE OF THE ABOVE/DOES NOT APPLY

According to our records, you previously lived on . Please choose the city from the following list where this street is located.

NONE OF THE ABOVE/DOES NOT APPLY

## Successfully EDE Enabled

- Upon successful ID proofing, you will be taken back to your dashboard where you should no longer see the 'enable EDE' button. Congratulations! You have now enabled EDE!



The screenshot displays the HealthSherpa dashboard interface. At the top, the HealthSherpa logo is on the left, followed by the text 'Agent Name NPN: 12345678'. To the right are links for 'Start application', 'Search Marketplace', and a blue 'Quote' button, along with help and settings icons. A vertical navigation sidebar on the left contains icons and labels for 'Insights', 'Clients' (which is highlighted in dark blue), 'Leads', 'Marketing', and 'Agency'. The main content area is titled 'Clients' and features a search bar. Below this are several filter dropdowns: 'Carrier' (Select), 'State' (Select), 'Documents' (Select), 'Payment' (Select), 'Archived' (Yes/No), and 'Renewal needed' (Yes/No). The 'No' button in the 'Archived' filter is highlighted in blue. At the bottom of the main area, it shows '0 clients' with a 'Renewal email' button, and on the right, 'View import history', 'Import', and 'Export' buttons.