

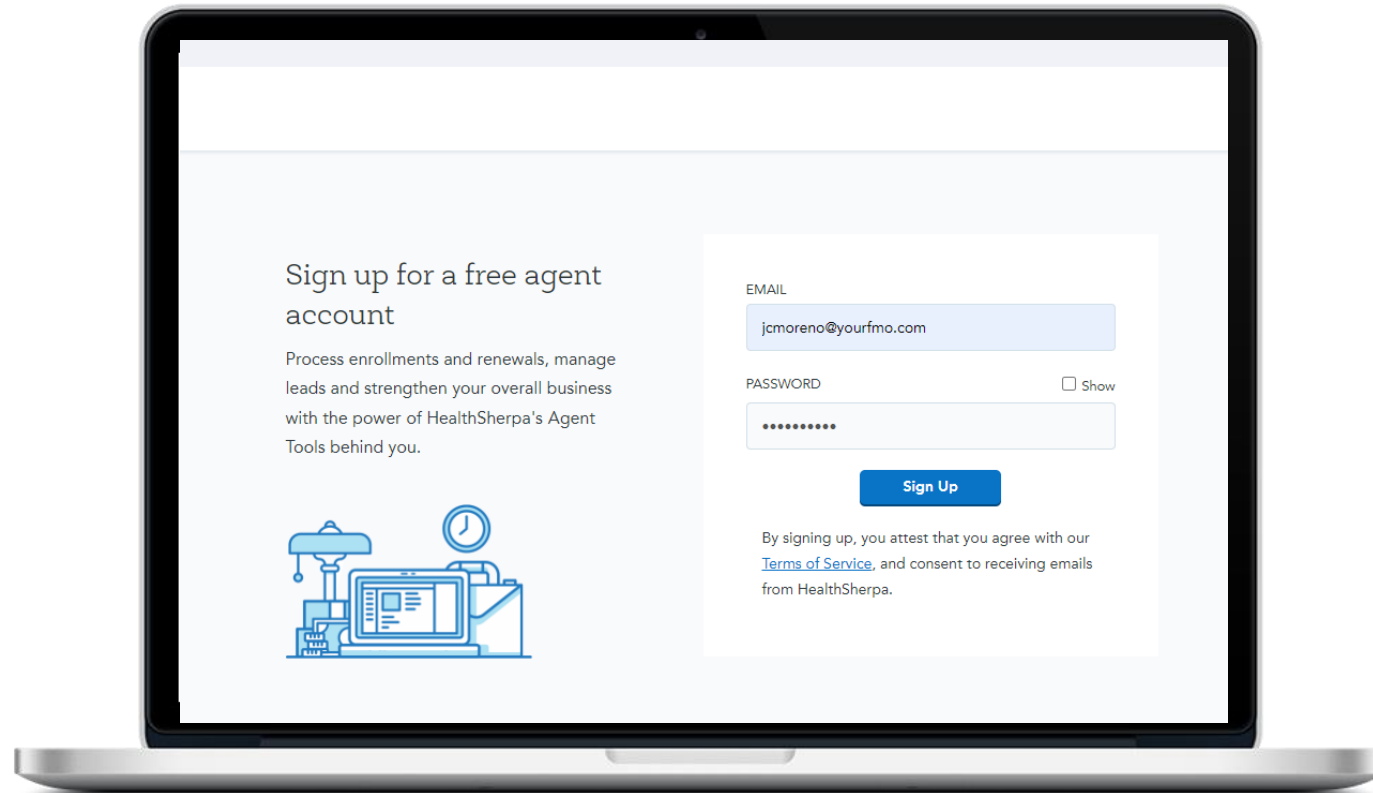


HEALTHSHERPA ACCOUNT CREATION GUIDE


HealthSherpa Account Creation Guide

Visit: www.healthsherpa.com/agents/new_user

Your email will also serve as your username



HealthSherpa Account Creation Guide

 **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
- I Saw You On Healthcare.Gov
- I Received An Email
- I Did A Web Search
- An Agency Recommended You
- I Took HealthSherpa FFM Training
- I Received A Sales Call
- Other

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HealthSherpa Account Creation Guide



Agency

Select the account type that applies to you.

You can always change this later in Settings.

Please select the scenario that
applies to you

- Create a solo agent account
- Create a new agency account
Choose this if you're the agency owner or admin.
- Join an existing agency
A join code is required.

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HealthSherpa Account Creation Guide

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.

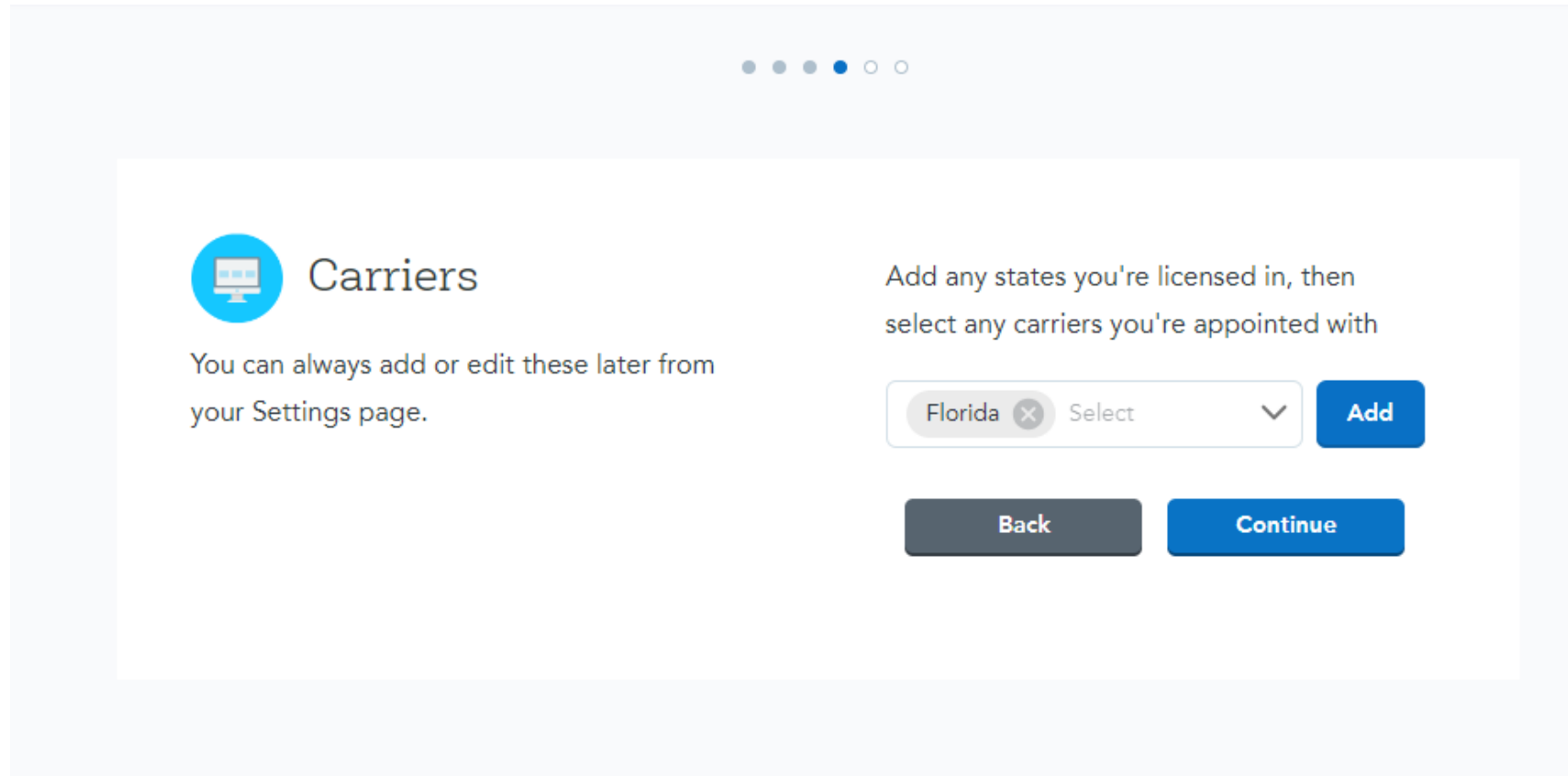
Join Code

E444

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E444 join code is specific to YourFMO

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The screenshot shows a multi-step account creation process. At the top, there are five circular progress indicators, with the fourth one filled in blue. The main content area is titled 'Carriers' and includes a blue circular icon with a computer monitor. Below the title, there is a paragraph of text and a form with a state selection dropdown, an 'Add' button, and 'Back' and 'Continue' buttons.

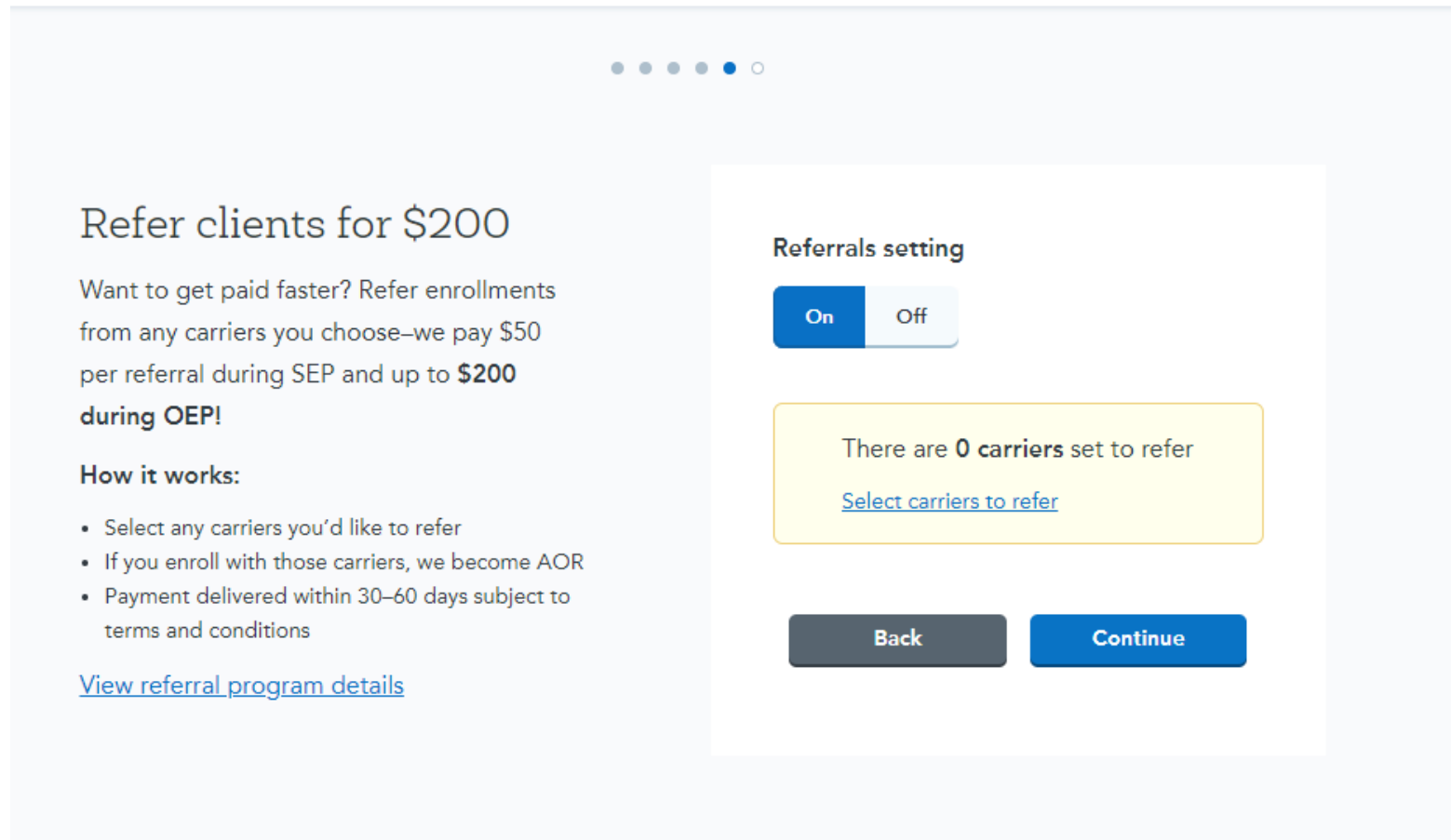
Carriers

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

Florida

HealthSherpa Account Creation Guide



Refer clients for \$200

Want to get paid faster? Refer enrollments from any carriers you choose—we pay \$50 per referral during SEP and up to **\$200** during OEP!

How it works:

- Select any carriers you'd like to refer
- If you enroll with those carriers, we become AOR
- Payment delivered within 30–60 days subject to terms and conditions

[View referral program details](#)

Referrals setting

On Off

There are **0** carriers set to refer

[Select carriers to refer](#)

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To enable referrals, please review and accept these terms. ×

proceeding. Any arbitration will be settled under the Federal Arbitration Act and administered by the American Arbitration Association under its Consumer Arbitration Rules. Notwithstanding the foregoing, nothing in this Agreement will be deemed to waive, preclude, or otherwise limit the right of either Party to: (a) pursue an enforcement action through the applicable federal, state, or local governmental agency if that right of action is available; (b) seek injunctive relief in a court of law in aid of arbitration; or (c) file suit in a court of law to address an intellectual property infringement claim.

f. Entire Agreement. This Agreement constitutes the entire understanding and agreement between the Parties with respect to the subject matter hereof and supersedes all previous arrangements, understandings, representations, or agreements between the Parties whether written or oral.

g. Expenses. Each Party agrees it shall be responsible for its own expenses incurred in connection with this Agreement, including attorneys' fees.

h. Severability. If any provision of this Agreement or any portion of any provision of this Agreement is determined to be null and void or unenforceable by any court or tribunal having jurisdiction, then such provision or portion of the provision shall be considered separate and apart from the remainder of this Agreement and this Agreement shall otherwise remain in full force and effect.

i. Force Majeure. Neither Party will be liable to the other Party for any delays or failure to perform its obligations hereunder due to acts of God, action by any governmental or quasi-governmental agency, fire, flood, earthquake, strike, outside network difficulties (including, but not limited to, communication line failure) or other acts beyond the reasonable control of, and without any fault of such Party.

j. Counterparts. This Agreement may be executed in two or more counterparts, each of which shall constitute an original and both of which together shall be deemed to be one and the same instrument.

k. Notices. Except as otherwise provided herein, all notices, requests, approvals, consents, demands or other communications required or permitted to be given under this Agreement shall be in writing and sent by email, facsimile, or overnight courier to the last known address of the Parties. Notice shall be deemed provided as of the date such written notice is sent.

I have read and accept the Agreement.

I ACCEPT

HealthSherpa Account Creation Guide

FFM Username is same username as CMS.gov

Compliance

This information is needed in order to verify compliance and to make sure the carrier sees you on enrollments from the exchange.

Your FFM Username is the same login name you use when logging into portal.cms.gov.

[Not FFM certified? Try our refer-only account](#)

FFM Username ([Forgot username?](#))

NPN ([Forgot npn?](#))

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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

HealthSherpa Account Creation Guide

The screenshot shows the HealthSherpa agent homepage. At the top left, the user profile for 'Jc Moreno' (NPN: 17834592) is visible, with an 'Enable EDE' button. A green arrow points to this button with the text 'Click here'. A welcome message banner reads: 'Welcome to HealthSherpa! The easier, faster alternative to Healthcare.gov — designed specifically for agents & brokers.' The left sidebar contains navigation options: Home, Clients, Leads, Exports, Insights, Bonuses, Marketing, and Settings. A 'Feedback' button is at the bottom of the sidebar. A green callout box over the 'Home' link says: 'Introducing our new agent homepage! See notifications, metrics, and more'. Below the sidebar, there are tabs for 'All clients', 'At risk AOR', 'Documents due', and 'EDE access revoked'. A search bar for 'Search clients' is on the right. A 'Take us for a spin!' section features an 'Import' button and a table of clients. A callout box over the first client row says: 'This is an example Client — click their name to see their Client Details page.' The table has columns: Plan, Premium, Effective, Created, Documents, Payment, and Actions. The first row shows 'Jane (Example client)' with a 'View' button. Below the table, a note states: 'This is an example client — your clients will appear here after you've submitted or imported an application.' Two promotional cards are present: 'Test drive a demo of our application' with a 'Household' form preview, and 'Watch our product overview video' with a video player showing a table. The bottom section is divided into 'Resources' and 'Frequently asked questions'. Resources include links for 'Read the Getting Started Guide', 'Enable full Marketplace sync.(EDE)', and 'Set up your client-facing enrollment site'. F.A.Q. includes 'What's your relationship to Healthcare.gov?' and 'How is this platform free?'. A 'Feedback' icon is in the bottom right of the F.A.Q. section.

Jc Moreno | Jc Moreno NPN: 17834592 | Enable EDE **Click here** | Start application | Search Marketplace | Quote On-Ex

Welcome to HealthSherpa! The easier, faster alternative to Healthcare.gov — designed specifically for agents & brokers.

Home | Clients | Leads | Exports | Insights | Bonuses | Marketing | Settings | Feedback

Introducing our new agent homepage! See notifications, metrics, and more

All clients | At risk AOR | Documents due | EDE access revoked | Search clients

Take us for a spin! | Import

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

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

Test drive a demo of our application | Household | Watch our product overview video

Resources | Frequently asked questions

- Read the Getting Started Guide
- Enable full Marketplace sync.(EDE)
- Set up your client-facing enrollment site

What's your relationship to Healthcare.gov?
We're an official Healthcare.gov partner, with full integration. Updates made here will sync to Healthcare.gov, and updates made there will appear here.

How is this platform free?

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Integrate your FFM account

FFM Account Integration 🔴 Unlinked

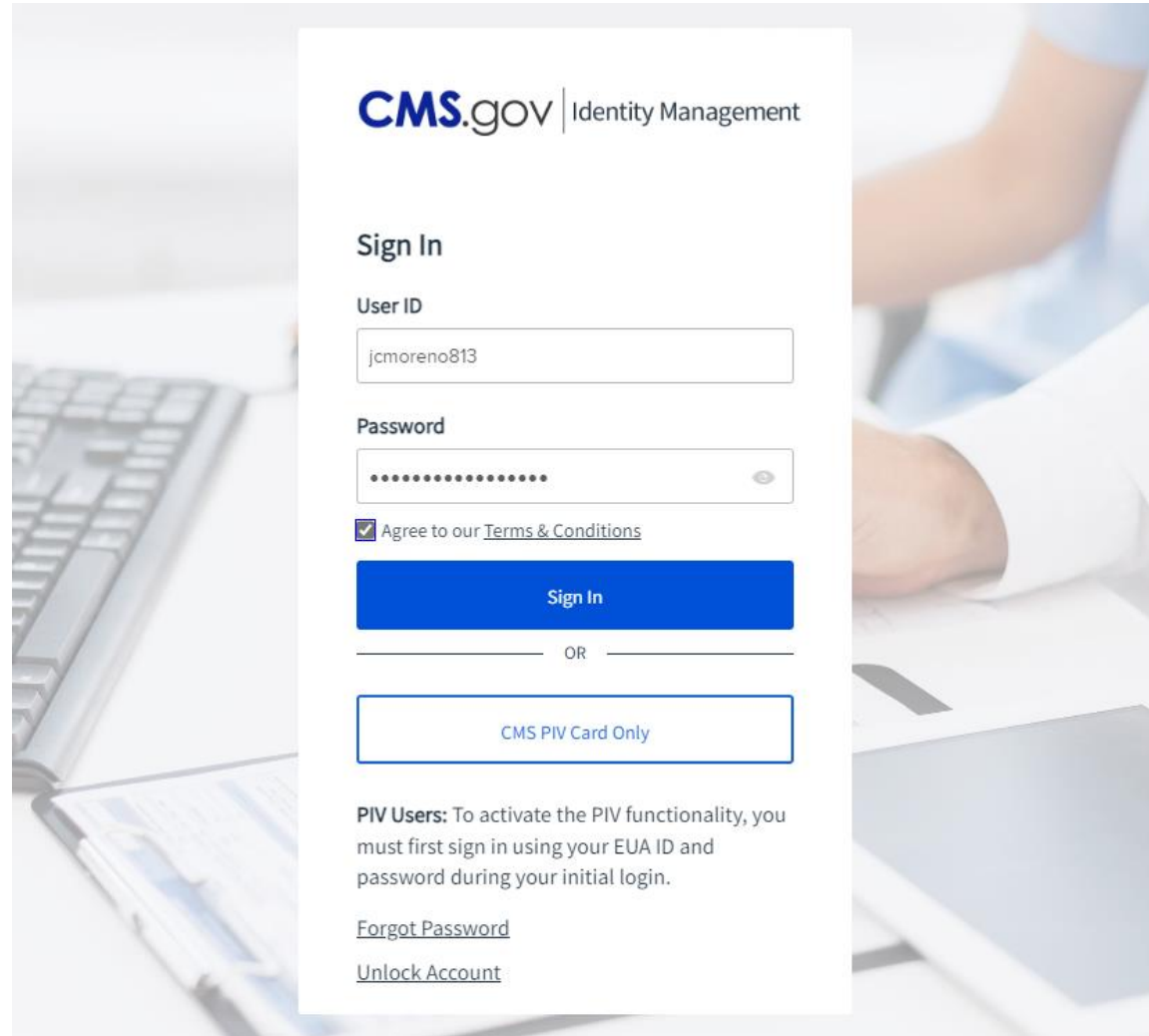
Your account will need to be linked in order to enable EDE. By clicking "Integrate my FFM account," a new window will open, directing you to CMS IDM to verify your login credentials. Once you are finished, you can return to this tab and complete the rest of the EDE enablement process.

[Integrate my FFM account](#) 

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CMS.gov | Identity Management

Sign In

User ID

Password

Agree to our [Terms & Conditions](#)

Sign In

OR

CMS PIV Card Only

PIV Users: To activate the PIV functionality, you must first sign in using your EUA ID and password during your initial login.

[Forgot Password](#)

[Unlock Account](#)

HealthSherpa Account Creation Guide

Congratulations! You successfully integrated your FFM account!

Jc Moreno Dashboard

Integrate your FFM account

FFM Account Integration ✔ Linked

Your FFM account was successfully integrated with your HealthSherpa account! You may now continue with EDE enablement

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HealthSherpa Account Creation Guide

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: ▼

Date of birth: Social security number:

Contact information

Street address: Apt. / Ste. (Optional):

City: State: ▼ Zip code:

Phone number:

HealthSherpa Account Creation Guide

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](#)

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**HealthSherpa Account Creation,
Complete**