

Broker & ISA Account Setup



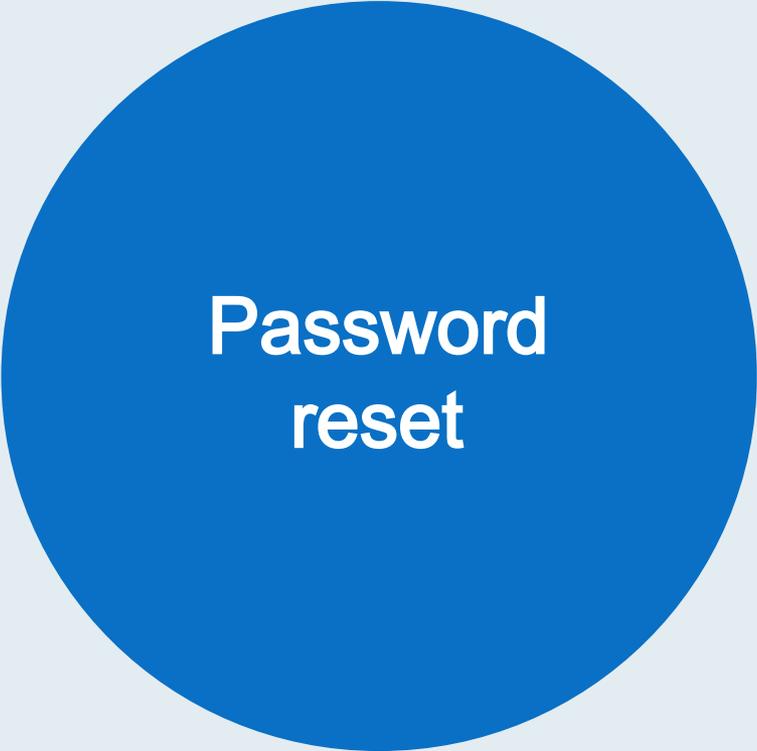
Broker + ISA account setup

Once a broker or ISA account has been provisioned, there are multiple parts to completing account setup:

1. **Password reset:** user will set their password and login to their account
2. **FFM Integration:** Since 9/1, CMS requires agents to integrate their FFM account when signing on with HealthSherpa
3. **Onboarding:** configuring the account on the whitelabel platform for the user's information (e.g., name, contact information, NPN, agency affiliation)
4. **Enable EDE:** identity and NPN verification to enable all EDE functionality

Note:

- *If in the provisioning process NPN and FFM ID are provided, brokers and ISAs will bypass the "Onboarding" step.*
- *This is the case for all ISAs who are enabled to sell and service accounts.*



**Password
reset**

Reset password

Brokers navigate to the carrier whitelabel site and select sign in. Then input their email and select forgot password. For all brokers created via the bulk upload process their email will include +carrierslug. For example if their email is jane@healthsherpa.com the email they will use to login will be jane+carrierslug@healthsherpa.com

Reset Password

Enter your new password to finish the password reset process.

EMAIL ADDRESS

PASSWORD

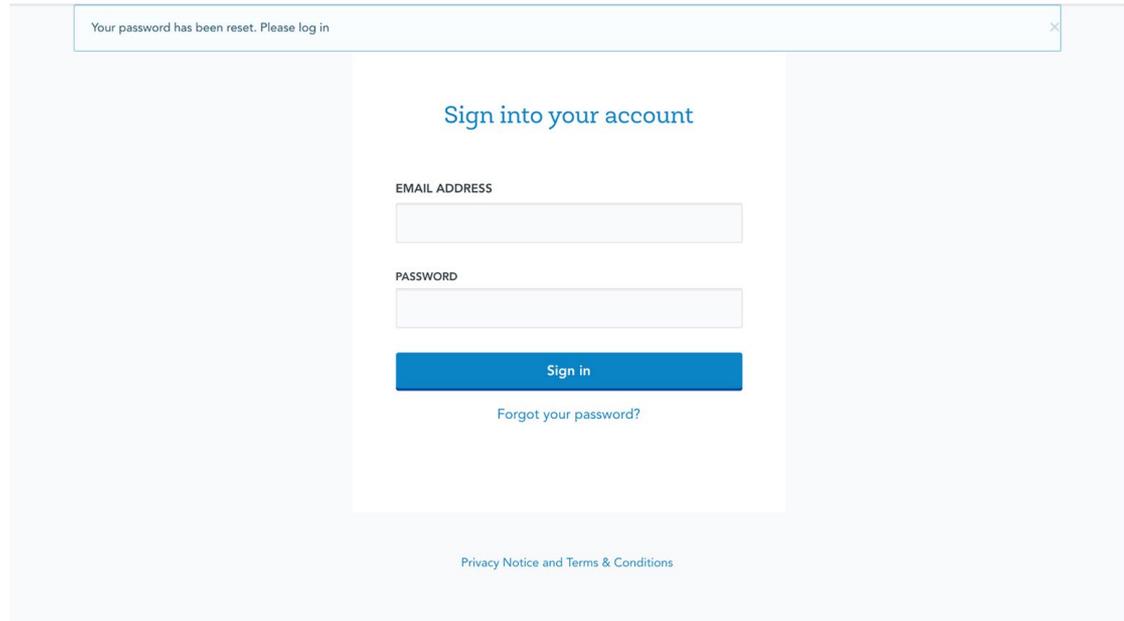
PASSWORD CONFIRMATION

[Set Password](#)

Password
reset

Sign into account

After resetting their password, the broker will be prompted to sign into their account using the new password.



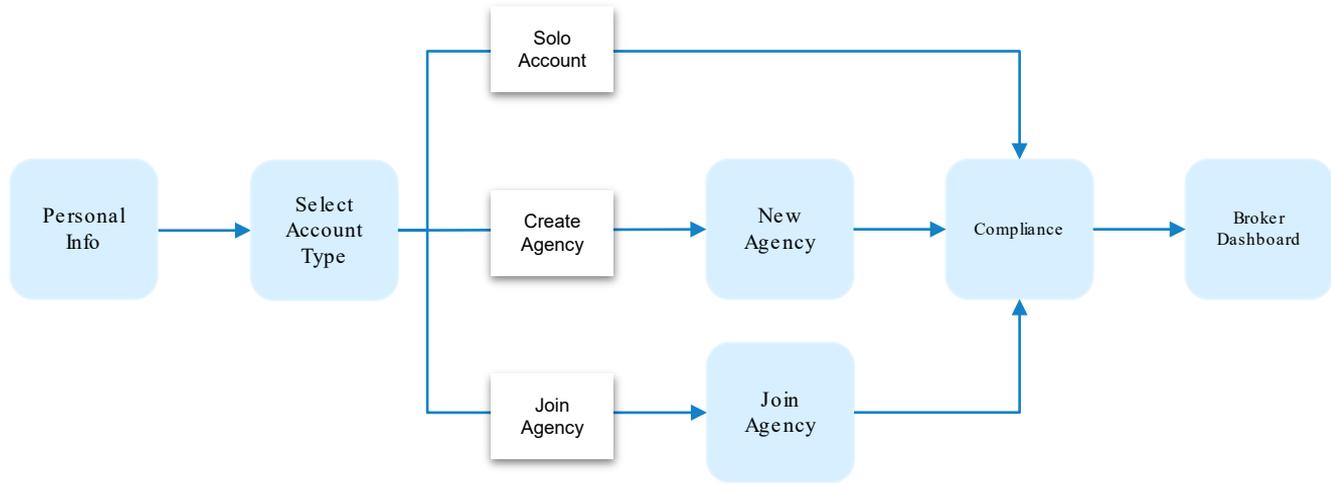
The screenshot shows a web interface for signing into an account. At the top, a light blue notification bar contains the text "Your password has been reset. Please log in" with a close button (X) on the right. Below this, the main heading "Sign into your account" is centered. Underneath, there are two input fields: "EMAIL ADDRESS" and "PASSWORD". Below the password field is a blue "Sign in" button. A link "Forgot your password?" is positioned below the button. At the bottom of the page, there is a link for "Privacy Notice and Terms & Conditions".



Onboarding

Onboarding process

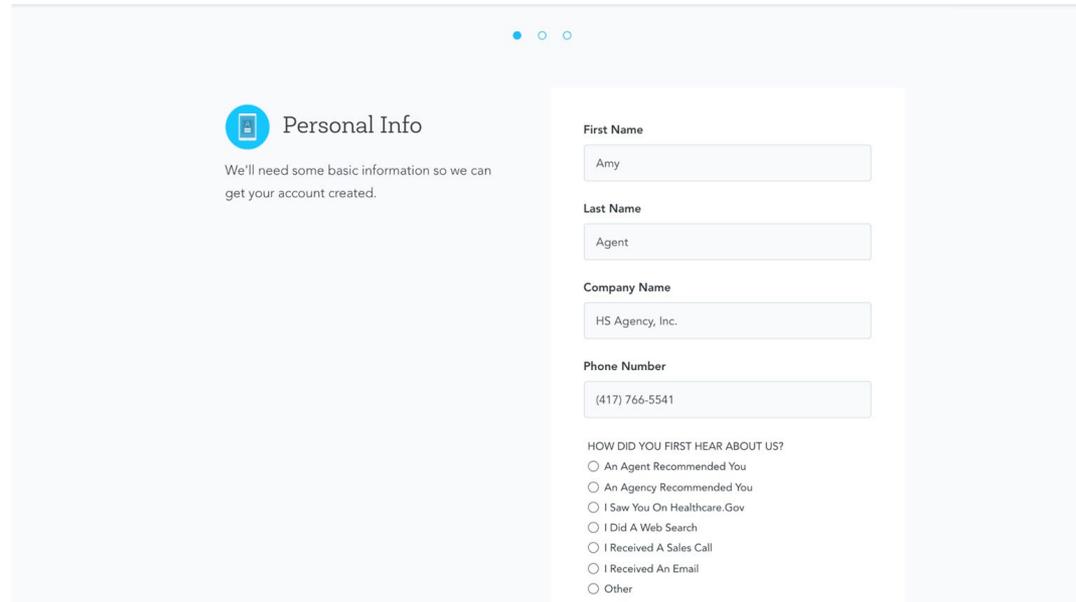
Upon logging in, the broker will be prompted to confirm and/or enter their information, such as name, contact information, NPN, and agency affiliation:



Note: ISA accounts are provisioned with the associated NPN attached, so they will not be subject to the onboarding flow. If broker accounts include those NPN and FFM ID, they will also bypass the onboarding step.

Personal info

User will be prompted for the following fields. If previously provided as part of account provisioning, this information will be **pre-filled**.



The screenshot shows a web form titled 'Personal Info' with a blue icon of a person. Below the title is the text: 'We'll need some basic information so we can get your account created.' To the right, there are several input fields, each with a label above it: 'First Name' (pre-filled with 'Amy'), 'Last Name' (pre-filled with 'Agent'), 'Company Name' (pre-filled with 'HS Agency, Inc.'), and 'Phone Number' (pre-filled with '(417) 766-5541'). 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'. A final 'Other' option is also present.

Personal Info

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

First Name
Amy

Last Name
Agent

Company Name
HS Agency, Inc.

Phone Number
(417) 766-5541

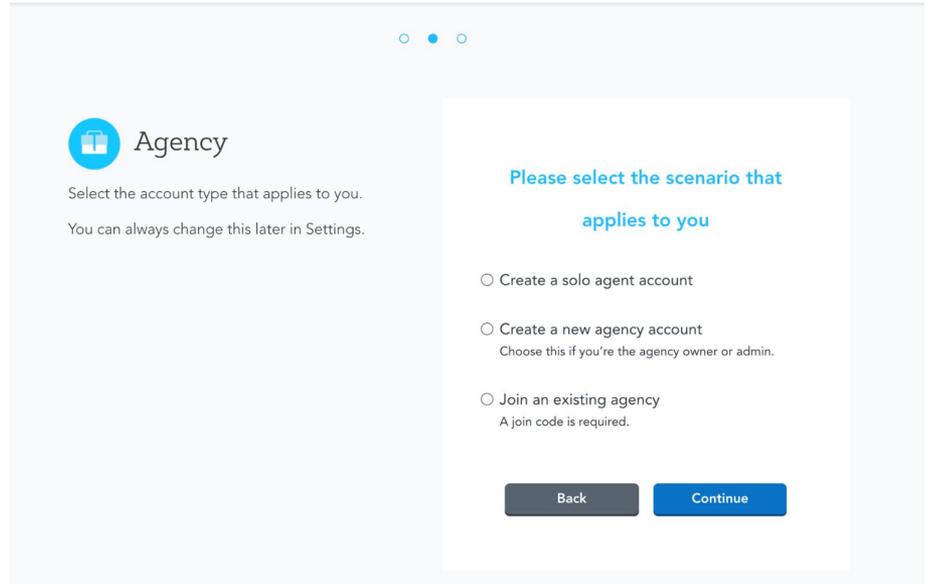
HOW DID YOU FIRST HEAR ABOUT US?

- 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

Account type

Next, the user will be prompted to select an account type. There are 3 options:

- Solo agent
- New agency account
- Join an existing agency

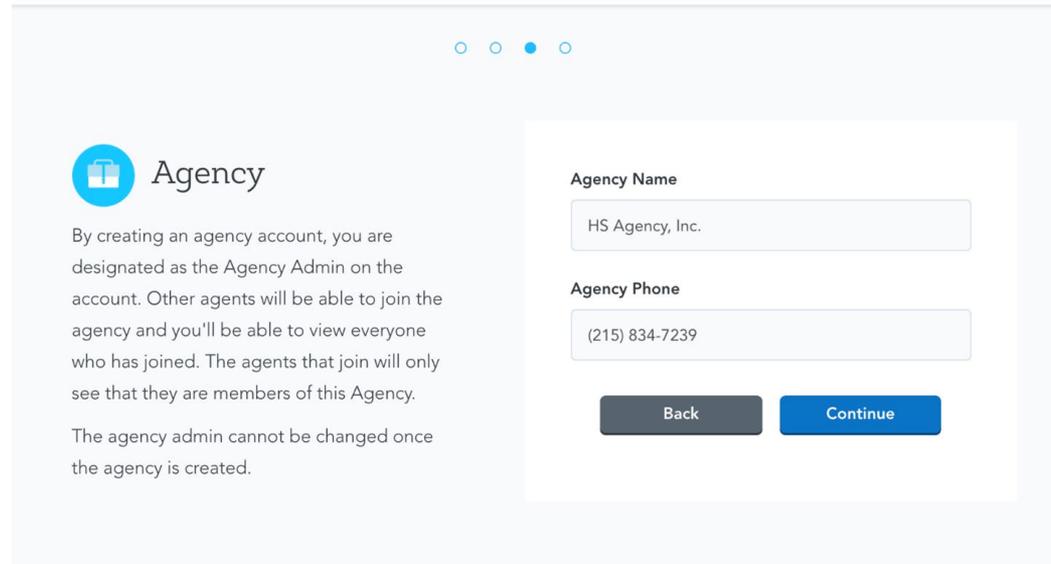


The screenshot shows a user interface for selecting an account type. On the left, there is a blue circular icon with a white building symbol, followed by the word "Agency". Below this, the text reads: "Select the account type that applies to you. You can always change this later in Settings." On the right, a white panel contains the instruction: "Please select the scenario that applies to you". Below this instruction 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 panel are two buttons: a grey "Back" button and a blue "Continue" button. At the top right of the main interface, there are three small circles, with the middle one being filled blue, indicating the current step in a sequence.

New agency

If the user selects “Create a new agency account”, they will be

- asked for the new agency’s name and phone number.
- designated as the agency administrator and have special privileges, including inviting individuals to the agency and being able to view all accounts within their agency.



The screenshot shows a web interface for creating a new agency. At the top, there are four small circles, with the third one from the left filled with blue, indicating the current step. On the left side, there is a blue circular icon containing a white briefcase, followed by the word "Agency" in a large, bold font. Below this, there is a paragraph of text explaining the role of an Agency Admin. On the right side, there is a form with two input fields: "Agency Name" and "Agency Phone". The "Agency Name" field contains the text "HS Agency, Inc." and the "Agency Phone" field contains "(215) 834-7239". Below the form, there are two buttons: a dark grey "Back" button and a blue "Continue" button.

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

HS Agency, Inc.

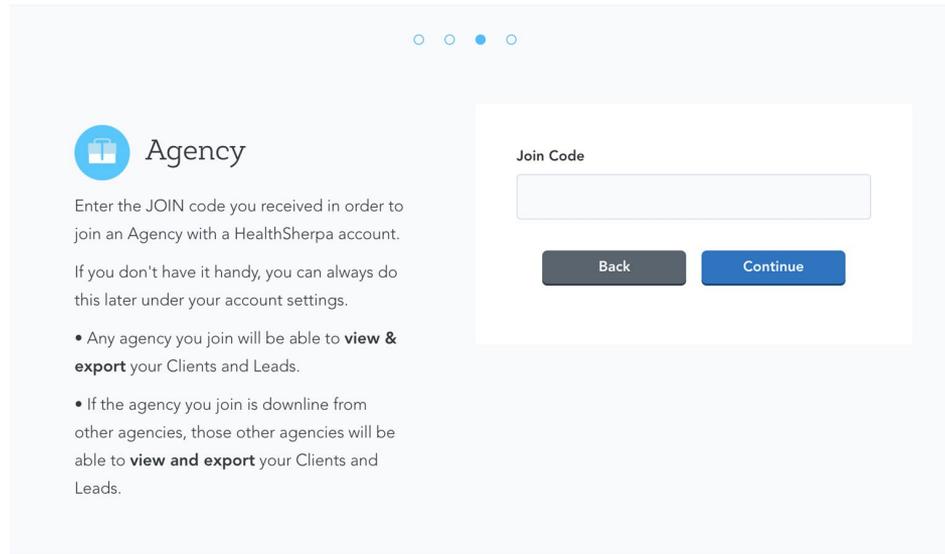
Agency Phone

(215) 834-7239

Back Continue

Join agency

If the user selects “Join an existing agency”, they will be prompted for the agency’s “join code” which is provided by the agency administrator.



The screenshot shows a web application interface for joining an agency. At the top, there are four small circles, with the third one from the left being filled blue, indicating the current step. The main content is divided into two columns. The left column features a blue circular icon with a white building, followed by the heading 'Agency'. Below this, there is a paragraph of text: '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.' This is followed by a bulleted list with two items: 'Any agency you join will be able to view & export your Clients and Leads.' and 'If the agency you join is downline from other agencies, those other agencies will be able to view and export your Clients and Leads.' The right column contains a form titled 'Join Code' with a single text input field. Below the input field are two buttons: a dark grey 'Back' button and a blue 'Continue' button.

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.

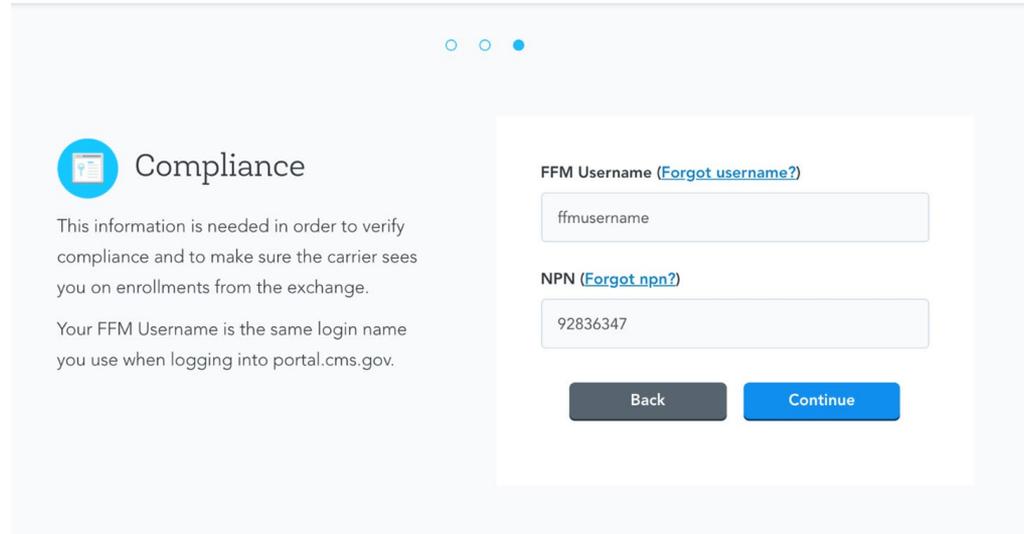
- Any agency you join will be able to **view & export** your Clients and Leads.
- If the agency you join is downline from other agencies, those other agencies will be able to **view and export** your Clients and Leads.

Join Code

Back Continue

Compliance

The user will be required to enter their FFM username and NPN, which will be attached to applications submitted by the broker/ISA.



The screenshot shows a web interface with a light blue background. At the top right, there are three small circles, with the rightmost one filled. On the left, there is a circular icon containing a document with a checkmark, followed by the heading 'Compliance'. Below this, there is explanatory text. On the right, there is a white form box containing two input fields: 'FFM Username' with a link '(Forgot username?)' and 'NPN' with a link '(Forgot npn?)'. Below the form are two buttons: 'Back' and 'Continue'.

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.

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

NPN ([Forgot npn?](#))

[Back](#) [Continue](#)

Dashboard

Upon completion of the onboarding flow, the user will be routed to their dashboard. In order to access full EDE functionality, the user needs to click the “Enable EDE” button in the header.

The screenshot displays the HealthSherpa dashboard interface. At the top left, the HealthSherpa logo is visible. To its right, the user's name 'Agent First Last Name' and ID 'MPN: 98765432' are shown. A prominent 'Enable EDE' button is located in the top header, with a green arrow pointing to it from the right. Further right in the header are links for 'Start application', 'Search Marketplace', and a 'Quote' button, along with help and settings icons. A left-hand navigation menu includes options for Clients, Leads, Insights, Referrals, Marketing, Agency, Associates, and Settings. The main content area is titled 'Clients' and features a search bar. Below this, there are filter sections for Carrier, State, Documents, Payment, Archived, and Renewal needed, each with a 'Select' dropdown or 'Yes/No' buttons. At the bottom of the main area, it indicates '0 clients' and provides buttons for 'Renewal email', 'Export', 'Import', and 'View import history'. A chat icon is located in the bottom right corner.



Enable EDE

Enable EDE

Brokers and ISAs must enable EDE on the account to utilize the EDE pathway, which includes

- enrolling directly on the Carrier Whitelabel platform (as opposed to being redirected to hc.gov),
- searching and claiming an application from the marketplace, and
- servicing a policy.

Enabling EDE consists of 3 steps:



Personal data collection

The user will need to enter in their SSN, DOB, and other personal information to verify their identity and their NPN.

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" value="wooter"/>	<input type="text"/>	<input type="text" value="yeah"/>	<input type="text" value="Select"/>

Date of birth Social security number

Contact information

Street address

Apt. / Ste. (Optional)

City State Zip code

Phone number

Enable EDE

ID proof

Users will verify their identity by answering questions from Experian. This is also known as Remote ID Proofing Service (RIDP) and required by CMS.

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](#)

You may have opened an auto loan in or around April 2021. Please select the lender for this account. If you do not have such an auto loan, select 'NONE OF THE ABOVE/DOES NOT APPLY'.

ONYX ACCEPT

TRANSAMERICA

CHASE MANHATTAN BK

JPMCB AUTO

NONE OF THE ABOVE/DOES NOT APPLY

You may have opened a mortgage loan in or around January 2013. Please select the lender to whom you currently make your mortgage payments. If you do not have a mortgage, select 'NONE OF THE ABOVE/DOES NOT APPLY'.

PHH MORTGAGE SERVICES

BANK OF AMERICA

INDEPENDENCE ONE

M AND T MORTGAGE

NONE OF THE ABOVE/DOES NOT APPLY

Enable EDE

NIPR NPN verification

The platform will also validate the NPN with NIPR. After this is complete, the user will be brought back to their dashboard.

Please verify your NPN

We need to verify your National Producer Number with the National Insurance Producer Registry (or NIPR). This helps protect you and your clients when using the Marketplace.

Individual Agency

National producer number (NPN) [edit](#)

17169718

First name

wooter

Last name

yeah

Date of birth

MM/DD/YYYY

Social security number

XXXX-XX-XXXX

By clicking submit, you agree to allow us to verify the NPN you use with the NIPR.

Submit



FFM Account Integration

Verify FFM Username and NPN

After logging into HealthSherpa for the first time (and every 30 days afterwards), agents will have to verify their FFM username and NPN under the Settings tab.

1

FFM Account Integration Disabled

[Integrate My FFM Account](#)

By selecting 'Link My FFM Account' you will be directed to <portal.cms.gov> to verify your log in credentials.

FIRST NAME
Agent

LAST NAME
Name

NPN
17169718

FFM USERNAME
DATA1EXPO1179

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

[Update](#)

2

CMS.gov | IDM

Sign In

Username

Password

Agree to our [Terms & Conditions](#)

[Sign In](#)

OR

[CMS PIV Card Only](#)

Attention CMS PIV card users: The CMS PIV Card button will be active after initial login using your 4 character CMS EUA ID.

[Forgot your Password](#) or [Unlock your account?](#)

Verification

Once the account is integrated, the agent will see a green check mark noting their successful account integration upon logging in to HealthSherpa.

3

FFM Account Integration ✓ Your FFM account has been integrated successfully

[Remove My FFM Account](#)

By selecting 'Remove My FFM Account' you will be directed to <portal.cms.gov> to verify your log in credentials.

FIRST NAME
Agent

LAST NAME
Name

NPN
17169718

FFM USERNAME
DATA1EXPO1178



FAQs

Frequently Asked Questions

- What scenario applies to me (create solo agent, create a new agency account, join an existing agency)?
 - If you are not part of a larger agency, select “Create solo agent”
 - If you are an administrator at an agency and would like to have special features and functionality, like shared access to leads and clients and special privileges for administrators, then you should select “Create a new agency.”
 - If you are part of an agency, consult with your agency as an agency account may have been set up.
 - If it has, then a join code will be provided and you should select “Join an existing agency”.
 - If you are unsure, then select “Create solo agent”. You can always create or join an agency at a later date.

Frequently Asked Questions

- Do I need to include my agency?
 - No, this is optional even if you are part of an agency. In the future, this will be required if agents would like to leverage the shared book functionality.
- Do I need to include a company name?
 - No, this can be left blank. Include this field only if the agent elects to use a name other than their first and last name.
- What do I do if I forgot my FFM username or NPN?
 - Select the forgot my FFM or forgot NPN prompt and follow the steps provided.



Appendix

Sync application with CMS

On the client view of the application, the button at the top:

- Indicates when the client's application was last synced with CMS
- Will sync it with CMS upon clicking

HealthSherpa | Agent Name
NPN: 17169718

Start application Search Marketplace Quote ? ⚙️

Clients Tiger Woods ↻ EDE synced a few seconds ago Report changes

Leads

Insights

Referrals

Marketing

Associates

Settings

Your follow-ups

There are just a few more steps to ensure you are covered.

Item	Member	Status	Deadline	Action
Verify loss of coverage	Tiger Woods	🔴 Action Needed	7/19/2020	Verify
Pay health premium	N/A	🔴 Action Needed	7/1/2020	
Verify income	Tiger Woods	🔴 Action Needed	9/17/2020	Verify
Verify citizenship	Tiger Woods	🔴 Action Needed	9/22/2020	Verify