Broker & ISA Account Setup

HealthSherpa

Broker + ISA Onboarding

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:

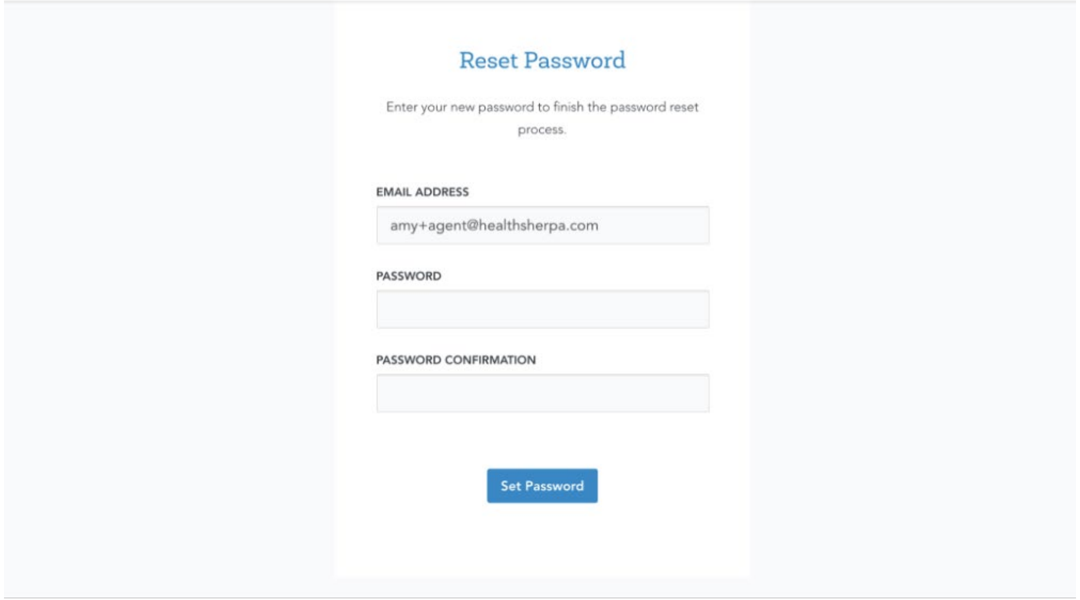
- *If in the provisioning process NPN and FFM ID are provided, brokers and ISAs will bypass the "Onboarding" step.*
- *This is the case for all ISAs who are enabled to sell and service accounts.*

Password
reset

Password reset

Reset password

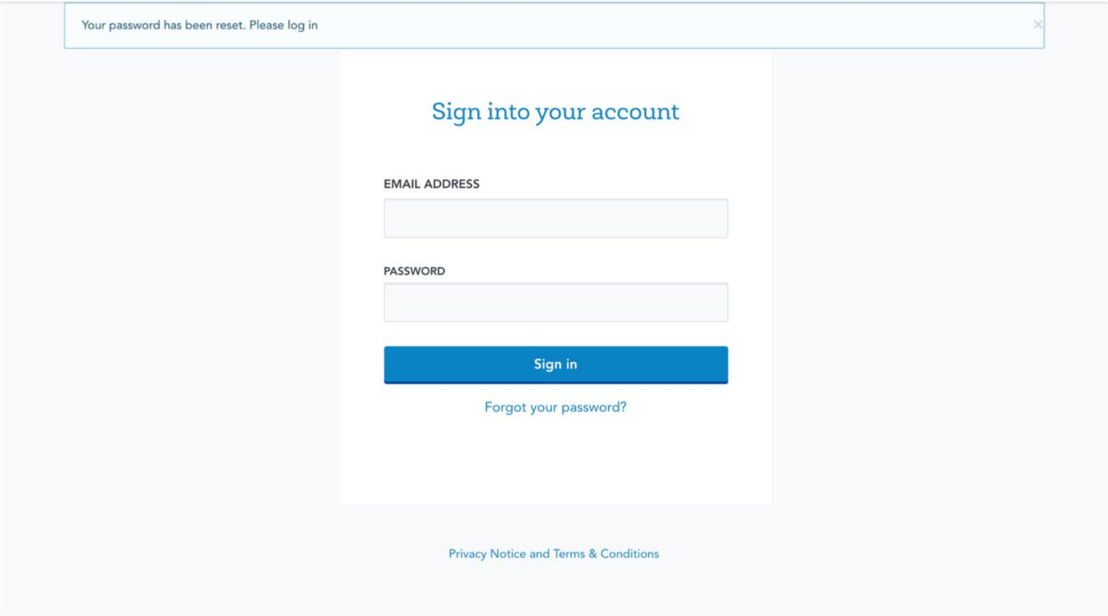
Brokers navigate to the carrier whitelabel site and select sign in. Then input their email and select forgot password. For all brokers created via the bulk upload process their email will include +carrierslug. For example if their email is jane@healthsherpa.com the email they will use to login will be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



Password reset

Sign into account

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

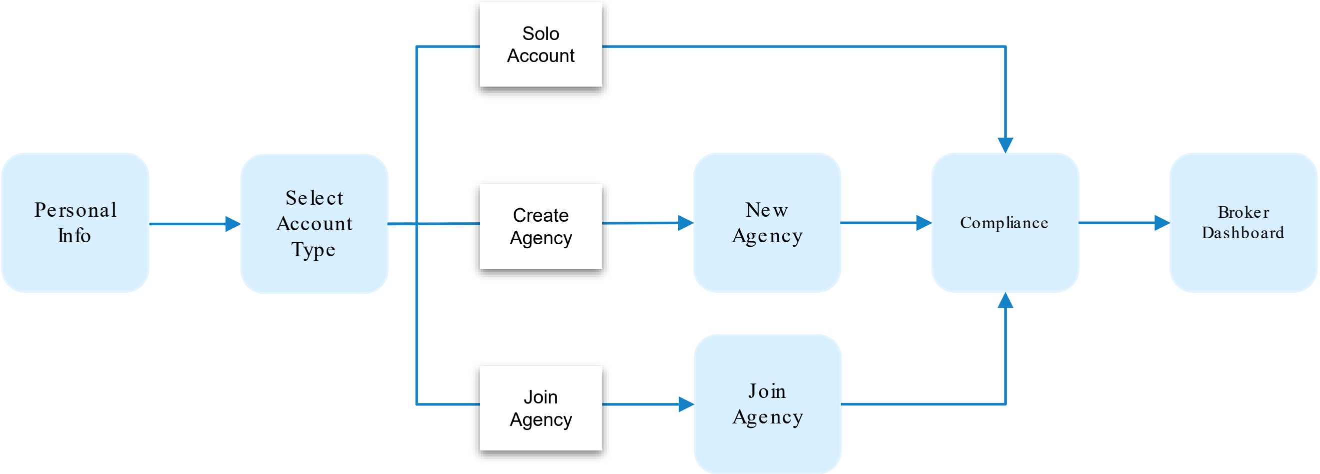


Onboarding

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:

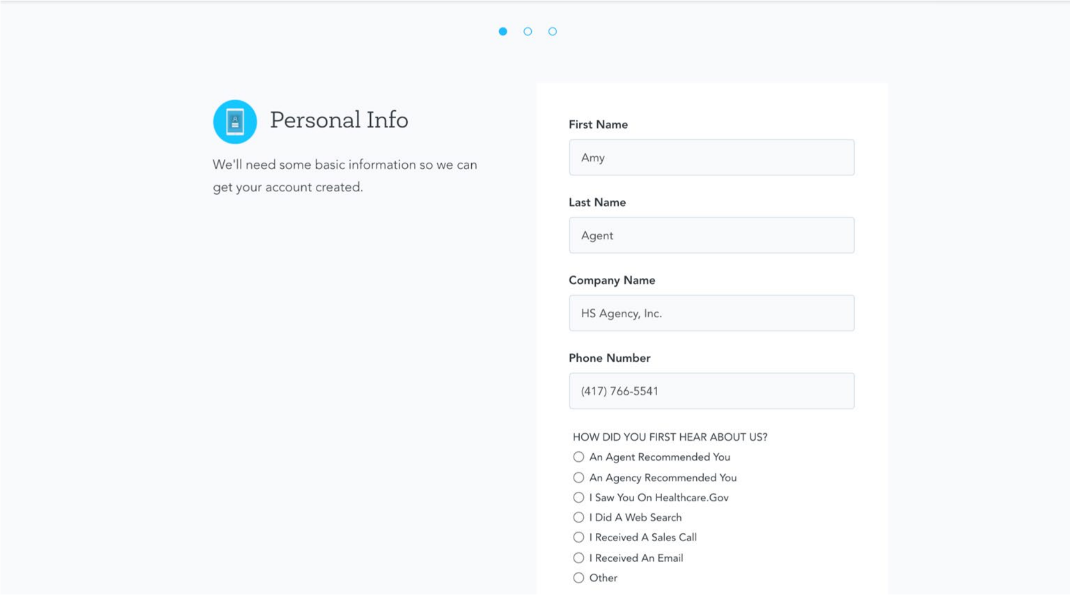


Note: ISA accounts are provisioned with the associated NPN attached, so they will not be subject to the onboarding flow. If broker accounts include those NPN and FFM ID, they will also bypass the onboarding step.

Onboarding

Personal info

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

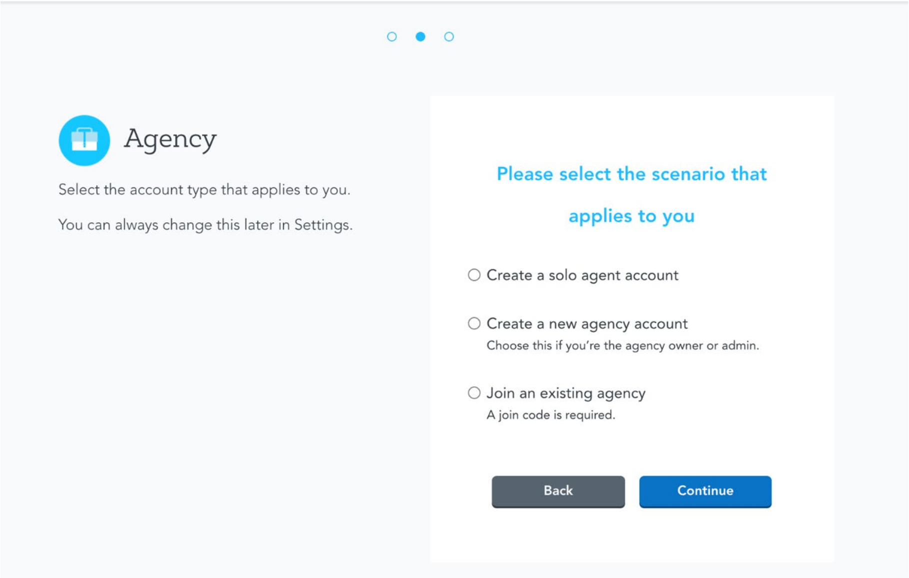


Onboarding

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

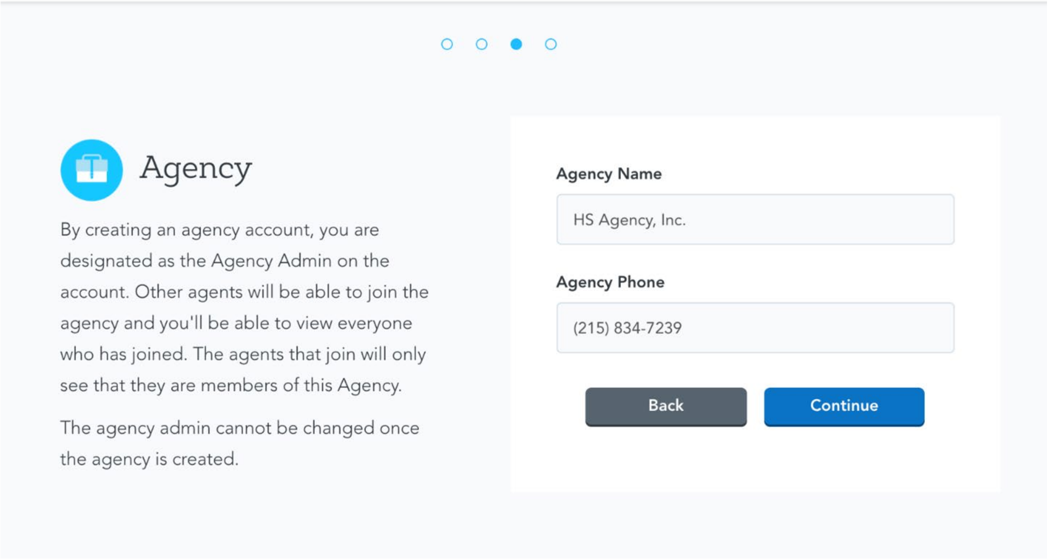


Onboarding

New agency

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

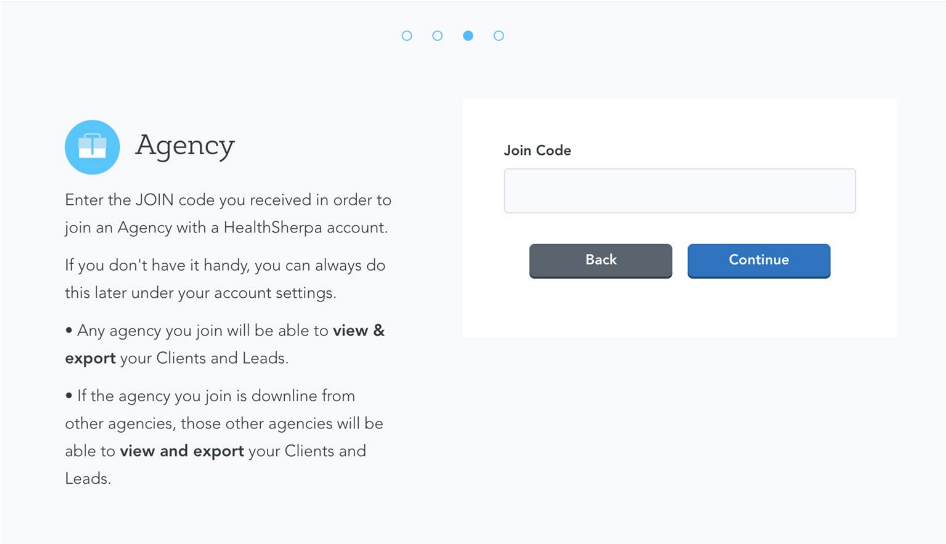
- asked for the new agency’s name and phone number.
- designated as the agency administrator and have special privileges, including inviting individuals to the agency and being able to view all accounts within their agency.



Onboarding

Join agency

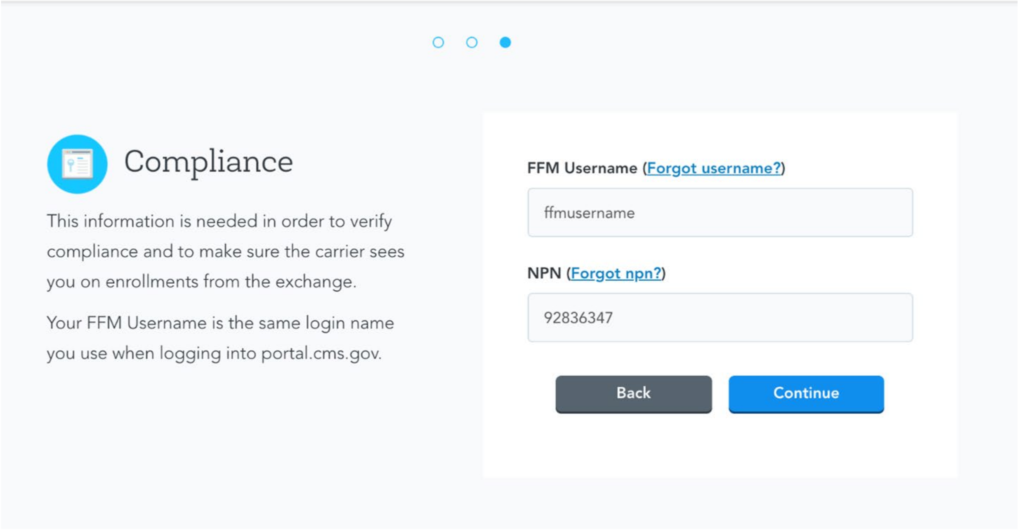
If the user selects “Join an existing agency”, they will be prompted for the agency’s “join code” which is provided by the agency administrator.



Onboarding

Compliance

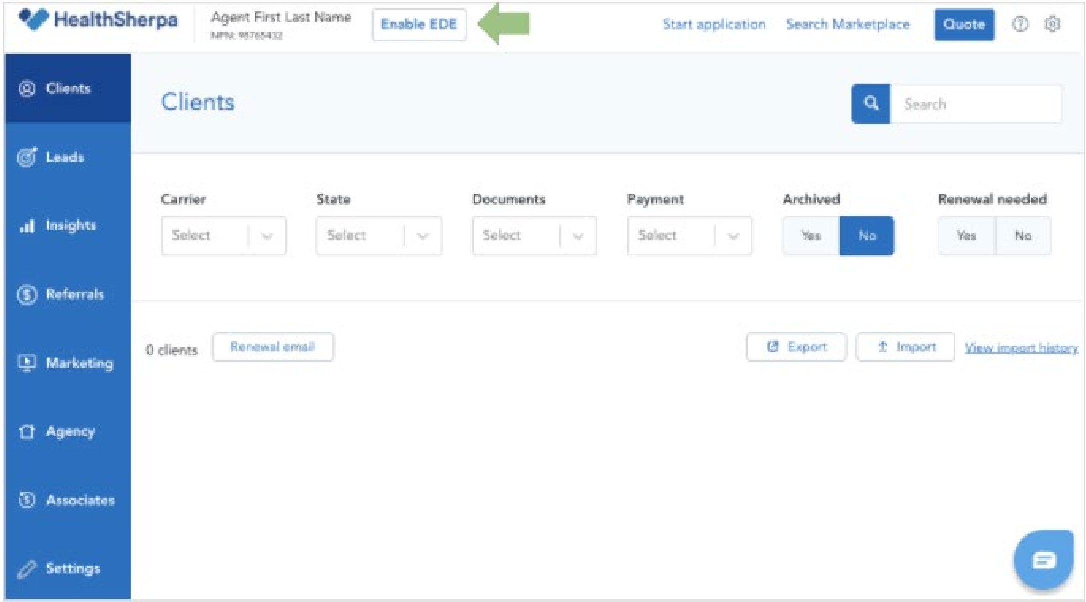
The user will be required to enter their FFM username and NPN, which will be attached to applications submitted by the broker/ISA.



Onboarding

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.



Enable EDE

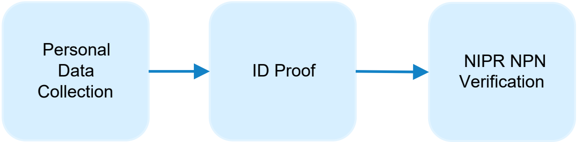
Enable EDE

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.

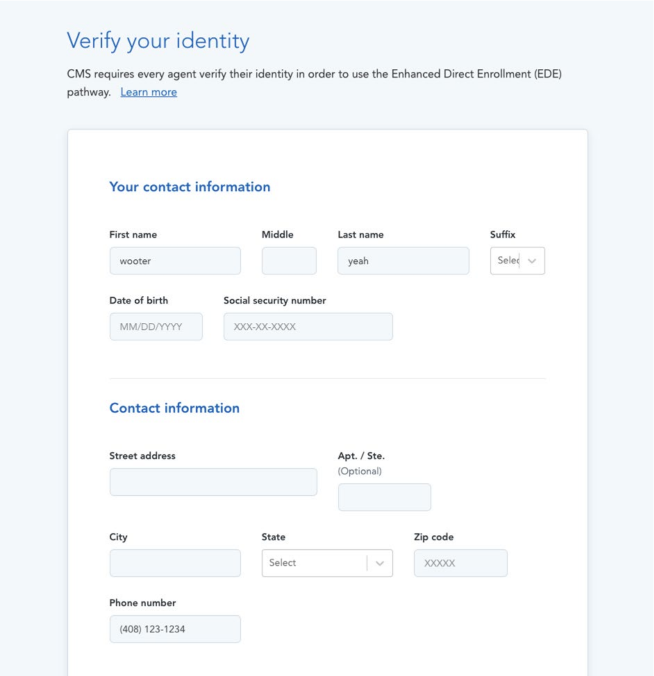
Enabling EDE consists of 3 steps:



Enable EDE

Personal data collection

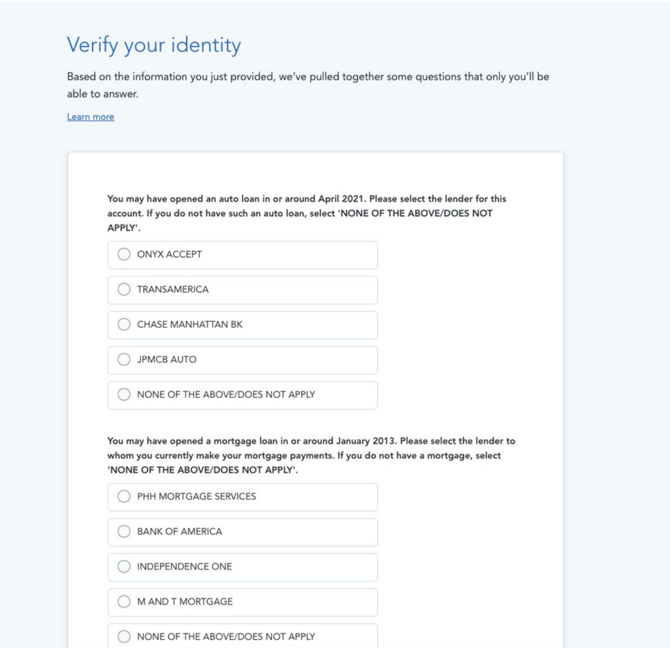
The user will need to enter in their SSN, DOB, and other personal information to verify their identity and their NPN.



Enable EDE

ID proof

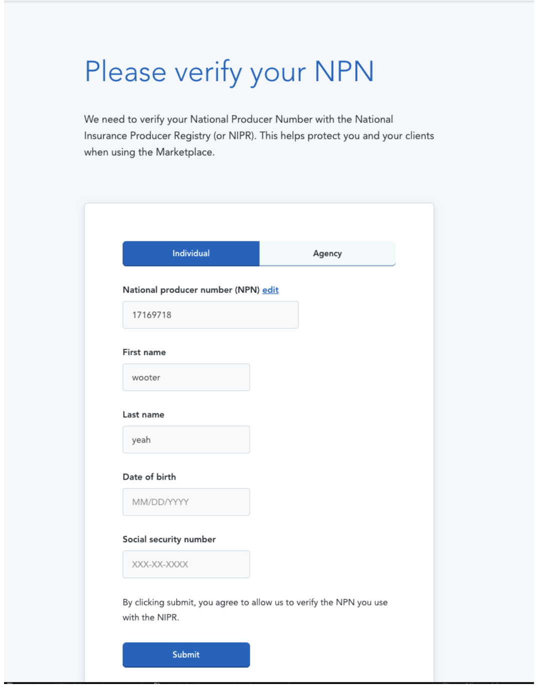
Users will verify their identity by answering questions from Experian. This is also known as Remote ID Proofing Service (RIDP) and required by CMS.



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.



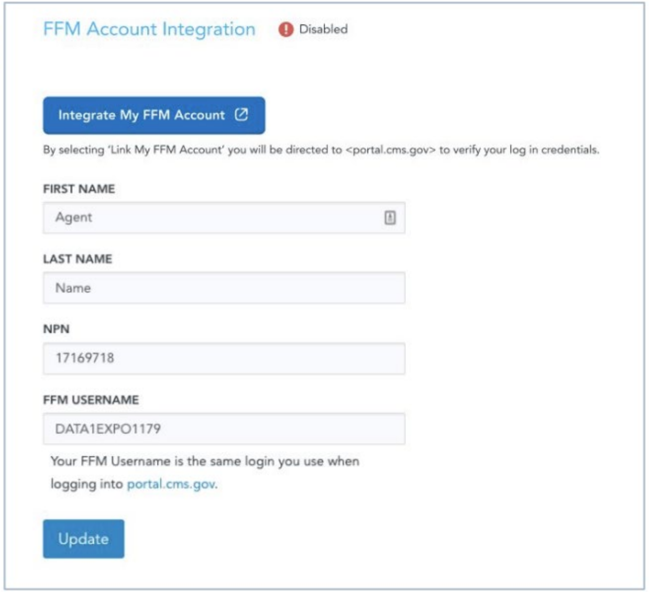
FFM Account Integration

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



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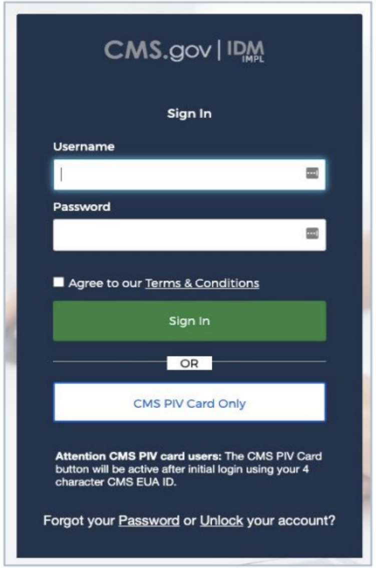
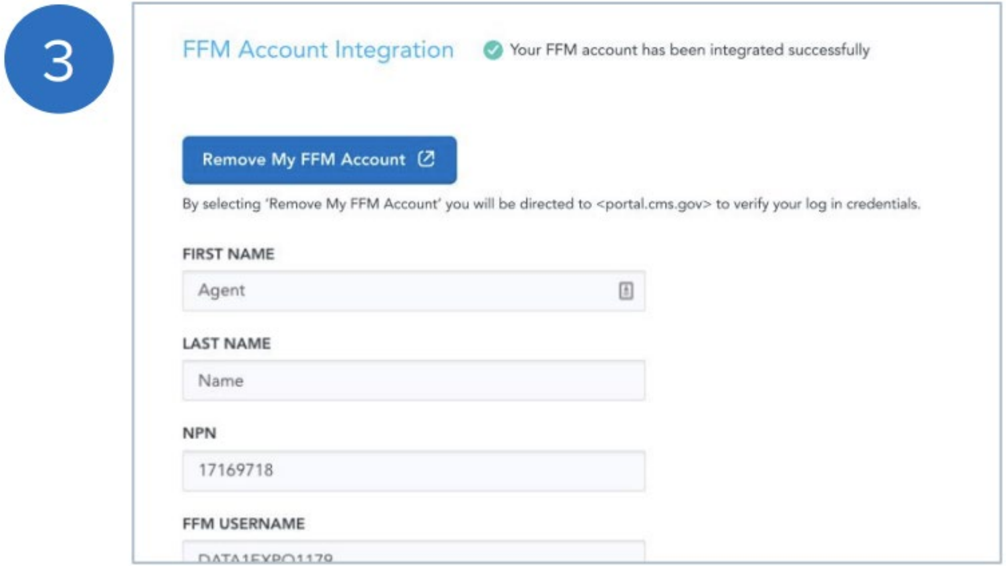


FFM Account Integration

Verification

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



FAQs

FAQ

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.

FAQ

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

Client View

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