Creating a HealthSherpa Account

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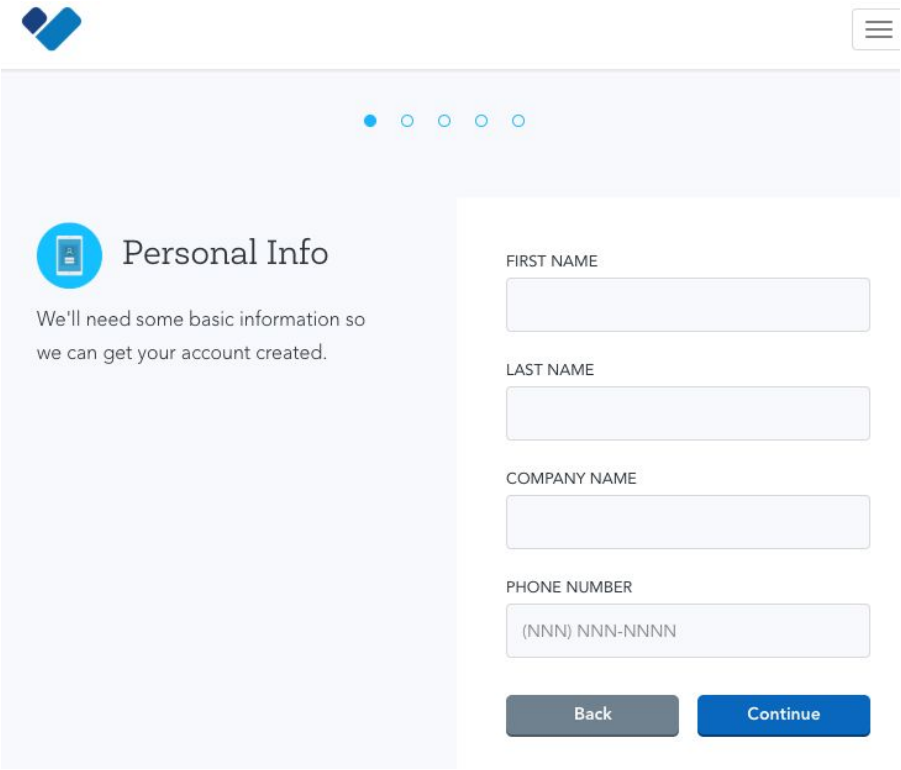
HealthSherpa

You can create your new account at this link: [Create a HealthSherpa Acct]

First, enter your email address and choose a strong password.

Then, enter in your name, company name, and preferred phone number.



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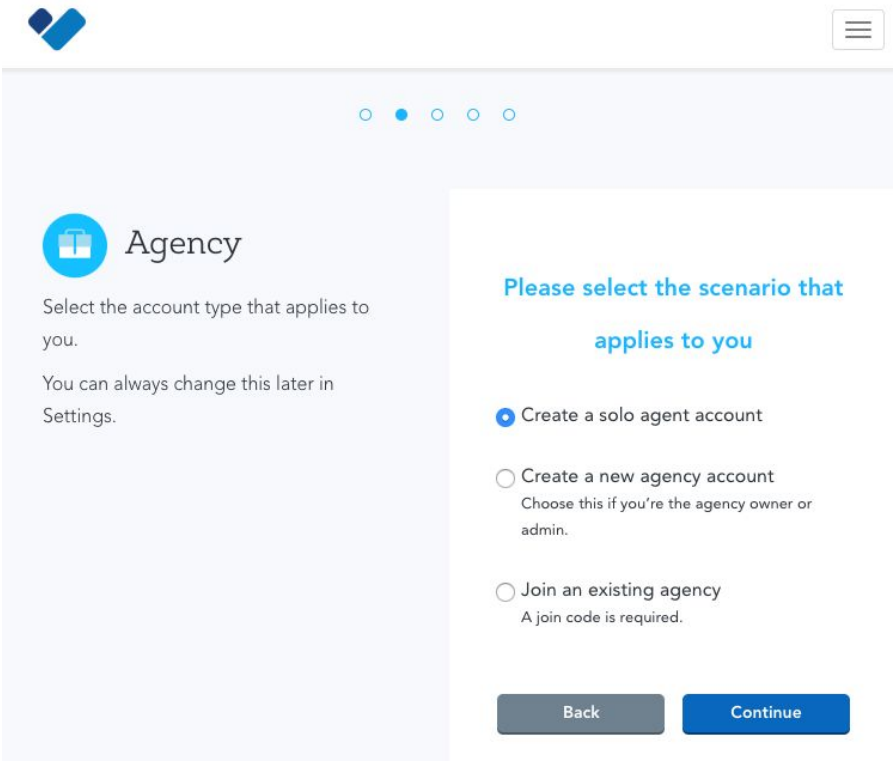
Select the account type that applies to you.

- Solo independent agent
- Agency Account
- Agent joining an existing agency (downline agent)
  - Obtain 'join code' from your agency



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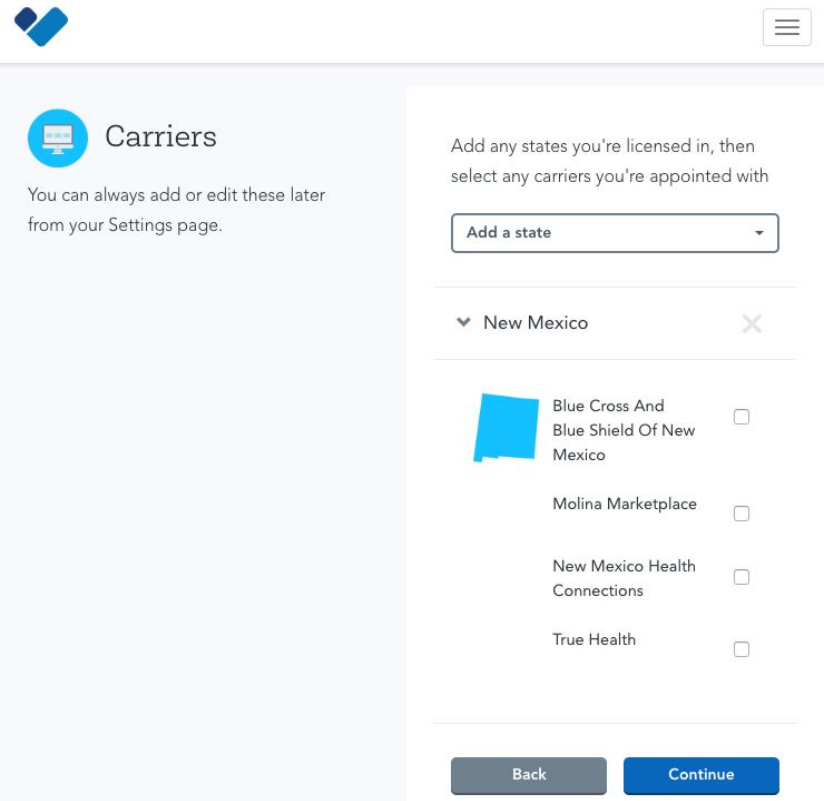
Add the states you are licensed in, and the check off the carriers you are appointed with. It is very important that this is accurate and up-to-date at all times.



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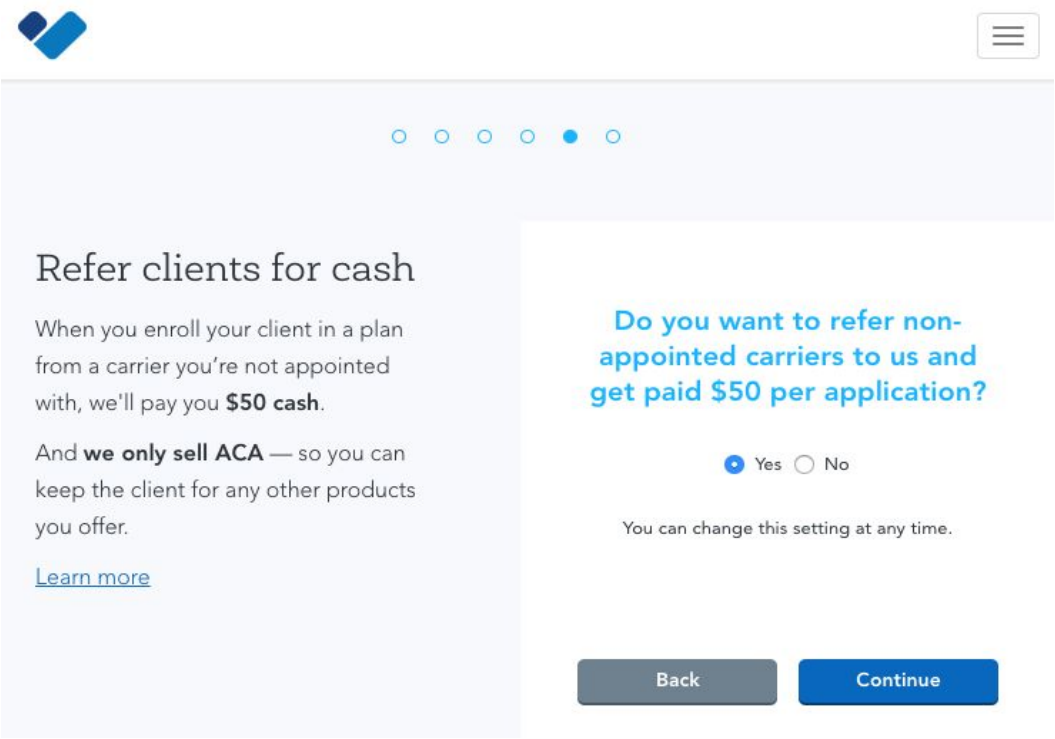
Opt into the referral program - this allows you to get paid $50 for applications you write with carriers you are not appointed with. The list of carrier appointments is very important, as this is how we determine whether to process an application as a referral or not.



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Sign the referral agreement (Joint Marketing Agreement).

Congrats on enrolling in the HealthSherpa Referral program! You'll soon be getting paid $50 for all non-appointed carrier applications.

To finalize enrollment, 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 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.

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

I ACCEPT

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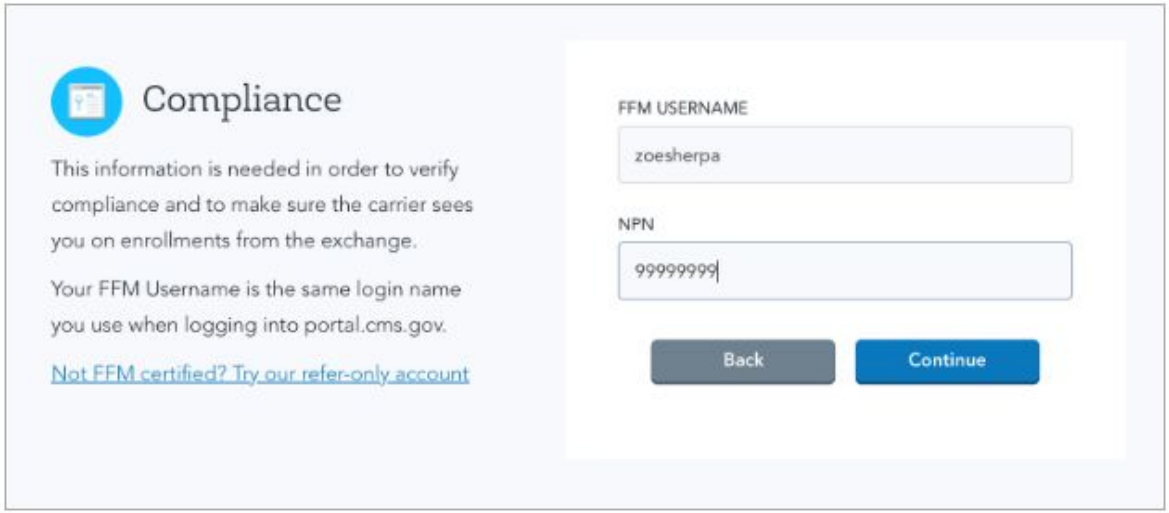
Enter your FFM username (this is the same username you use to log into portal.cms.gov) and verify your NPN. Ensure the NPN you are using is contracted with the carriers. This NPN will go on your applications.



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Authorizing 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

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EDE-enable

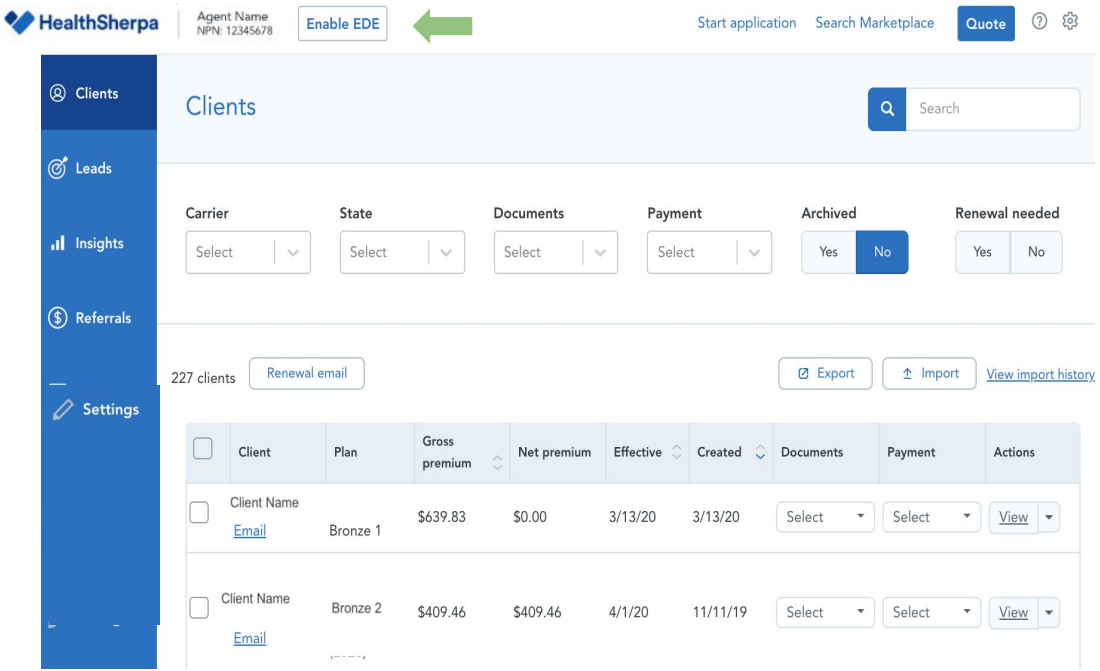
Enable EDE to get the most out of your HealthSherpa platform and maximize your ACA production

HealthSherpa

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.



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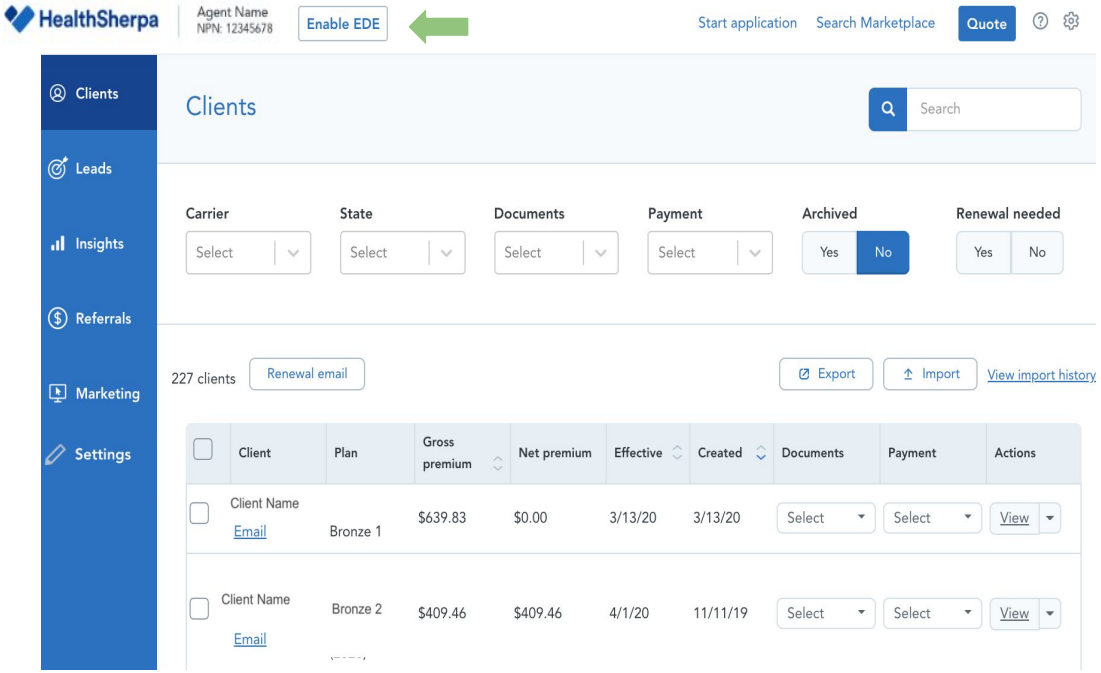
Enable EDE to:

- 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



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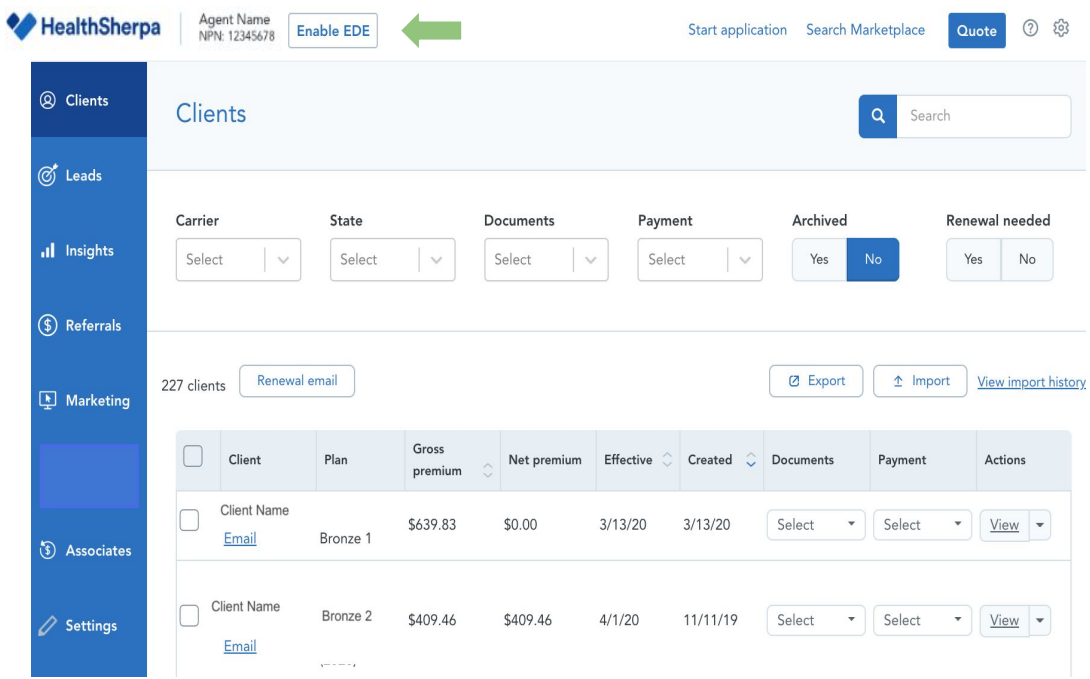
How to enable Enhance Direct Enrollment (EDE):

- When you log into your dashboard, you will see a "Enable EDE" button in the top - please click on this to begin the ID proofing process.



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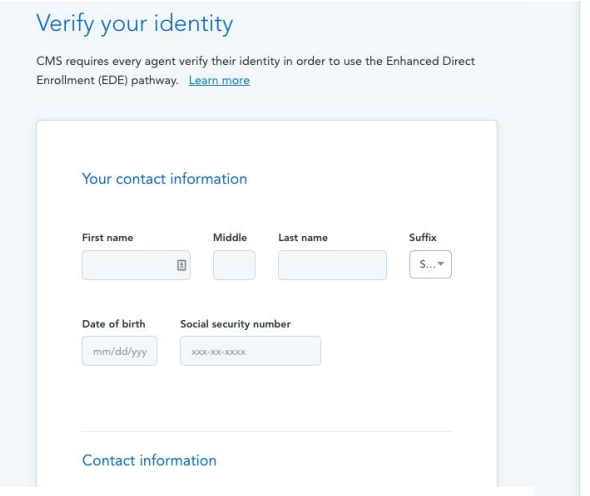
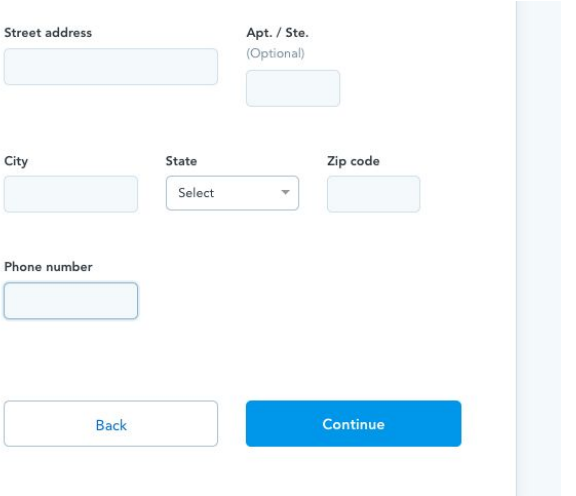
Verifying your identity

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





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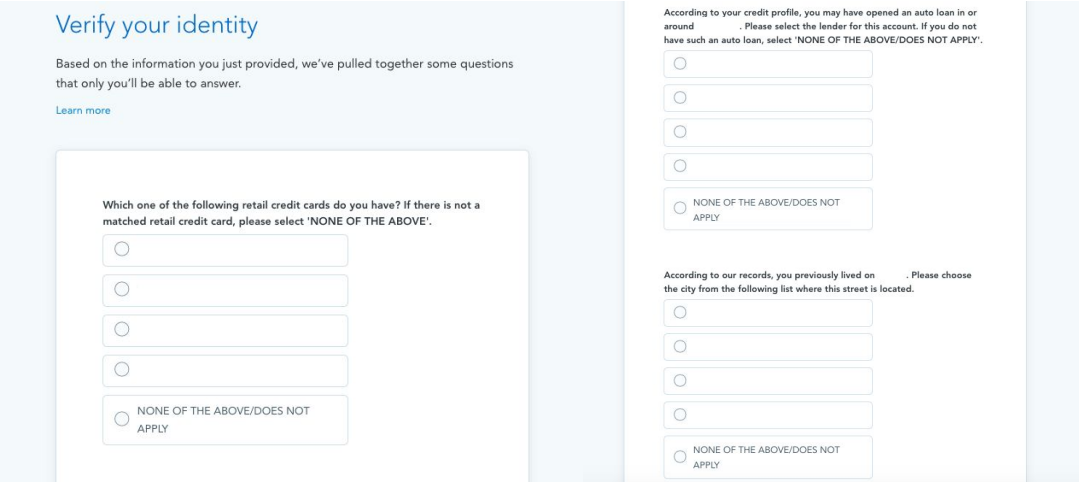
Verifying your identity

- 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).



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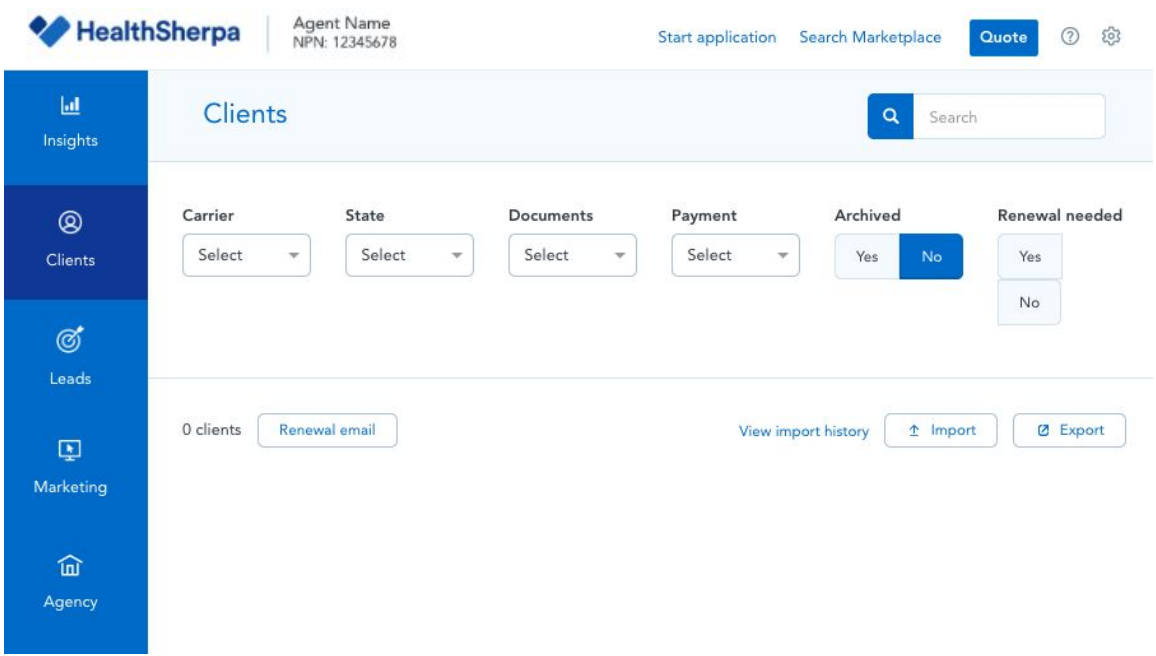
Verifying your identity

- 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!