



HealthSherpa Account Training

OEP 2024

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Before We Begin



We're recording!

We'll email you a link and the deck later today for you to review (and share if you want!)



Questions?

Submit questions via the Q&A feature within the zoom



Technical difficulties?

Attendees are automatically muted. If you are having trouble hearing, check your audio settings. You can also connect via phone.



Agenda

Who is HealthSherpa?

Account Setup

Platform Overview (Live)

Agent & Agency Features

HealthSherpa Resources

Q&A

Who is HealthSherpa?

HealthSherpa Marketplace

18 million+

Lives enrolled through HealthSherpa



4,800

Agency Accounts



45,000

Agents & Brokers



1+ million

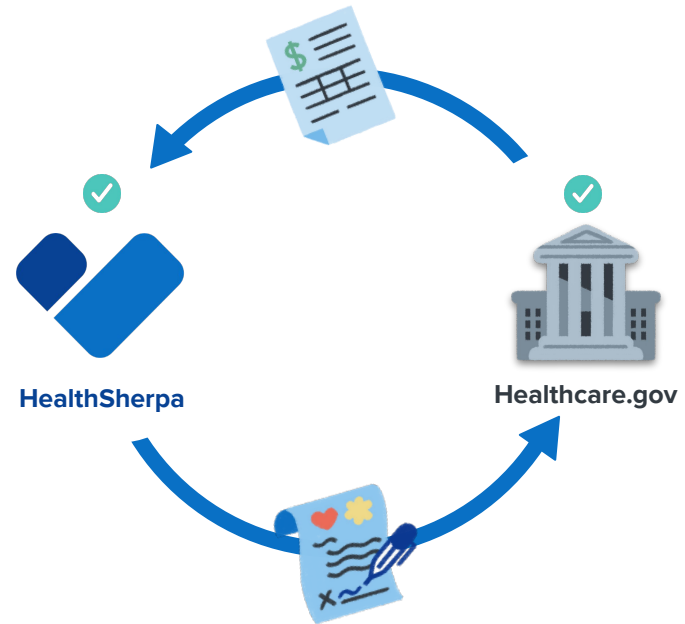
Lives Enrolled During PY2024



How do we make ACA enrollments easier?

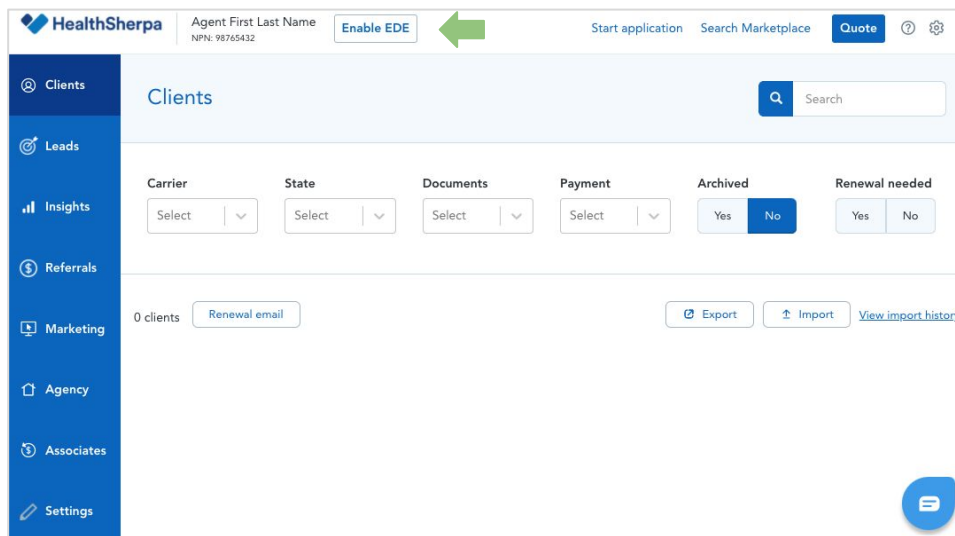
HealthSherpa connects to the Federal Marketplace through Phase III Enhanced Direct Enrollment (EDE), which lets agents:

- Complete applications directly on HealthSherpa
- Save time with pre-filled renewals
- Improve client effectuation
- View real time status updates, required Marketplace documents, 1095 A forms, and eligibility letters



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.



HealthSherpa EDE Application

HC.gov

HS for A

57

pages

25

15

mins for AB enrollment

7.5

15

mins for AB renewal

4

+ Full agent CRM
+ Streamlined quoting,
apps, and follow-up tools



Account Setup

Account Setup

Create your free HealthSherpa for Agents account on our [New User page](#)

After you create your account, check out our new user [Getting Started Guide](#)

1. Integrate your FFM Account
2. Enable EDE

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.

FFM Account Integration

CMS requires EDE partners like HealthSherpa to use additional authentication for all agents and brokers.

Beginning February 24, 2023 Agents and brokers will not be able to use their HealthSherpa account (or any other account with an EDE partner) to submit applications via EDE without completing this authentication.

Integrate your HealthSherpa account with your FFM account to make sure you don't lose access to full functionality on HealthSherpa.

[Click here to review integration instructions.](#)

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

LAST NAME

NPN

FFM USERNAME

Your FFM Username is the same login you use when logging into [portal.cms.gov](#).

[Update](#)

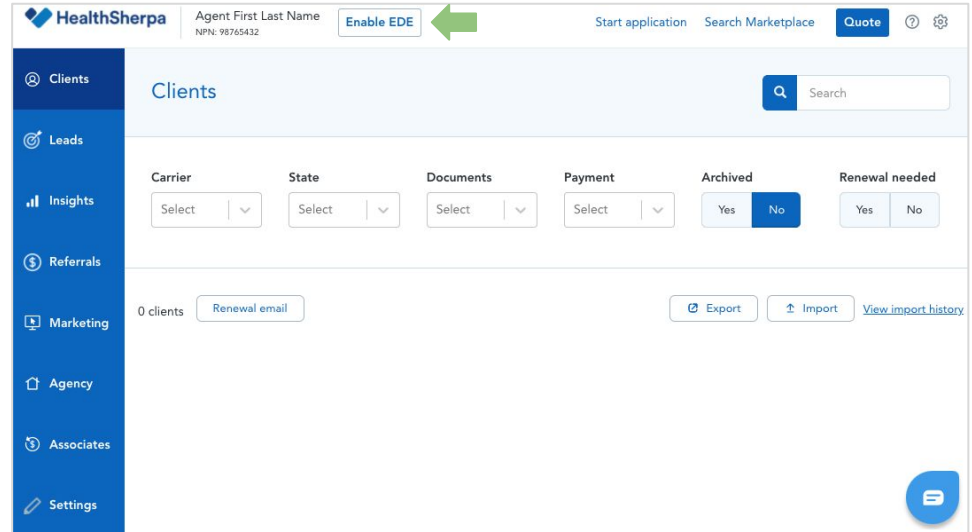
Agents need to turn on EDE in their account

To fully connect to the Marketplace, agents must opt into EDE by clicking the 'Enable EDE' button in the account.

Don't see the button?

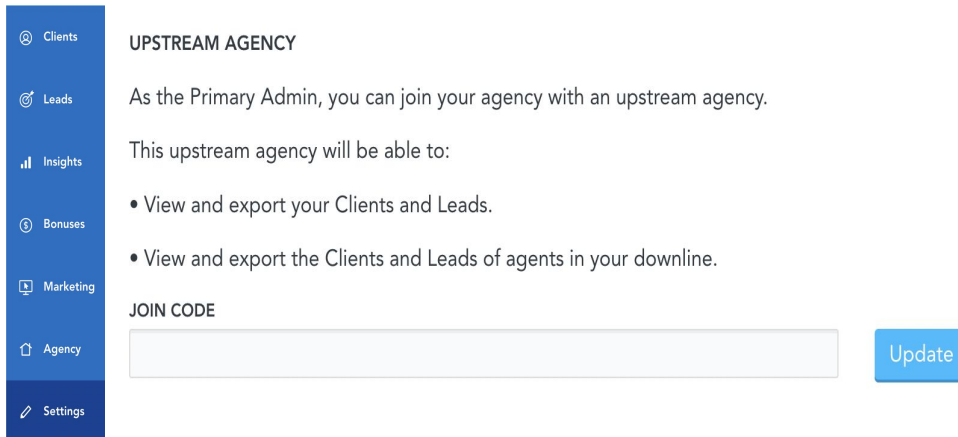
- If you recently got certified, it may take some time for the Enable EDE button to appear.
- Note: HealthSherpa is now an approved vendor for the Marketplace Agent and Broker Training Program for PY2023.

[Click here to review instructions on Enabling EDE](#)



Joining an Upline Agency

- Navigate to **Settings>Agency>Upstream Agency** to link your Agency or Agent account to an Upline Agency.
- Helps upline analyze production data, reconcile commissions, perform compliance checks, monitor BoB, and more.



UPSTREAM AGENCY

As the Primary Admin, you can join your agency with an upstream agency.

This upstream agency will be able to:

- View and export your Clients and Leads.
- View and export the Clients and Leads of agents in your downline.

JOIN CODE

Update

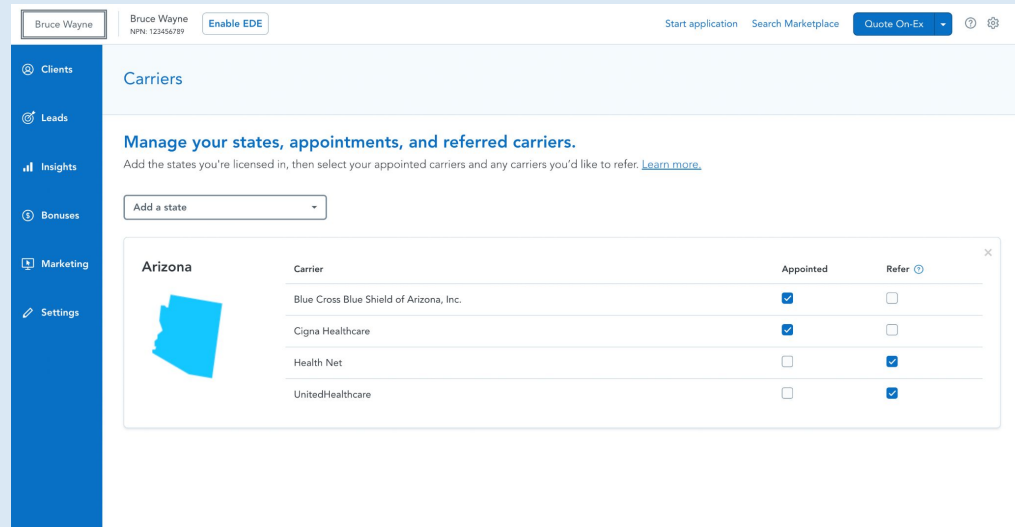
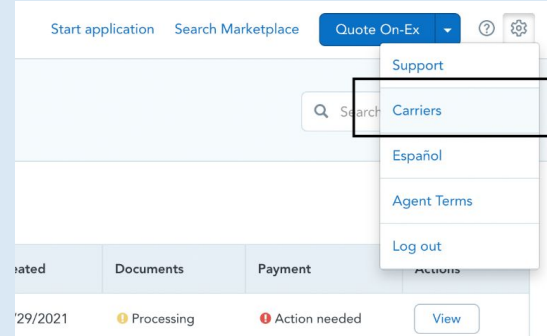
Ask your upline for Agency **Join Code**

Carriers Page

Set Licensed States, Appointment Status, and Referral Status for Carriers.

HealthSherpa does not automatically know your carrier appointments and contracts!!

Each agent must keep this information up to date.



Live Demonstration

Agent & Agency Features

Additional Features for Agents

How to monitor progress:

- Client/lead [export reports](#) - **Note: Handle PII with care.**
- [Leads Tab](#)
- Insights Tab

How to find more clients:

- [Marketing tab](#) - your free, customizable enrollment website.
- [HelpOnDemand](#) - a CMS queuing service to connect with consumers
 - [CMS-provided resources for Agents and Brokers](#)

Additional Features for Agencies

- **An Agency account in HealthSherpa lets you group various HealthSherpa accounts together.** [Learn how to create and invite agents to your agency.](#)
 - Each writing agent accessing HS should be using their own FFM Username and NPN, and agents should not share credentials.
- **Features available through an Agency account**
 - [Shared](#) and [Full](#) book: Allow agents to work each other's book.
 - [Multiple admins](#): Promote/demote downline agents to the admin role.
 - [NPN override](#): Let a downline agent write with another NPN — the writing agent must be licensed in the state.
 - [Agency Roster Exports](#): Download a roster of your downline agents.

Active Consent

Direct to Consumer Consent

Consent agreements embedded within the application flow allow consumers to grant agents consent from their custom marketing page

Privacy statement

Here at HealthSherpa, we work with the Marketplace to help you get health coverage.

[Learn more about the Marketplace](#)

Privacy and the use of your information

Important Marketplace Emails: If the Marketplace has your email address, they'll automatically send you important information, updates, and reminders about Marketplace enrollment. You can opt out of these communications at any time. To do this, click on the "unsubscribe" link in the footer of anyMarketplace email.

Privacy and the use of your information: The Marketplace will keep your information private as required by law. Your answers on this form will only be used to determine eligibility for health coverage or help paying for coverage. The Marketplace will check your answers using the information in their databases and the databases of other federal agencies. If the information doesn't match, the Marketplace may ask you to send them proof. The Marketplace won't ask any questions about your medical history. Household members who don't want coverage won't be asked questions about

To continue, you must agree and check each of the following statements:



- I agree to have my information used and retrieved from data sources for this application. I have consent for all people I'll list on the application for their information to be retrieved and used from data sources.
- I understand that I'm required to provide true answers and that I may be asked to provide additional information, including proof of my eligibility for a Special Enrollment Period if I qualify. If I don't, I may face penalties, including the risk of losing my eligibility for coverage.

Agent Consent Upload

Prompts within the agent workflow highlight consent requirements and allow agents to store and keep track of consent records they've captured outside of HealthSherpa

HealthSherpa stores required documents for the minimum of 10 years

Eligibility summary

Name	Covered by this plan	Next step
 Jane Fetterman	Yes	Enroll
 Fernando Garcia	Yes	Enroll

Consent

 [Download consent form](#)

You are required to collect written or verbal consent from your client before completing an enrollment. You can maintain this proof of consent in your own records or in your HealthSherpa dashboard.

How would you like to maintain proof of consent?

Upload my consent files to HealthSherpa

Accepted file types include text, audio, or image files (jpeg, png, pdf, txt, or mp3). Files must be smaller than 1 MB.

 Upload file

I already have proof of consent in my own records

Upload consent files later

Enroll in this plan

Not ready to enroll?

[Edit application](#)

[Change plans](#)

Consent on Agent Dashboard

Consent records are easily accessed and available for export from the Agent Dashboard

Consent status in the agent's client list indicates whether documentation is complete

Contact

Email: jesposito@gmail.com

Phone: (442) 323-2312

Address: 2631 NW 99th, Coral Springs, FL, 33065

Status

Status: Applying

Last update: 1/4/2021

Agent of Record: Other

Plans 2023

Renew

Health plan Silver HMO 1250

Ambetter from Magnolia Health

BRONZE

\$175.45

Premium
Was \$1,000

\$1,250

Deductible

\$5,250

Out-of-pocket max.

[View full plan details →](#)

Status

Enrolled

Members

Jane Esposito, Danny Esposito

FFM ID

872490

FFM Subscriber ID

32322323214

Effective

1/1/2021

Documents

[Summary of Benefits](#)

Carrier phone

(916) 456-7778

Payment phone

(916) 456-7778

[Pay premium](#)

[Change plan](#)

[Cancel plan](#)

Consent records

Method	Collection date	Consent status	Plan year	Download files	Action
Agent upload	01/03/2023	Collected	2023	Consent_01/02...	-

Marketplace notices

Date	Notice	Plan year	Details
12/10/2020	Important! Followup Documentation Insufficient	2021	View

HealthSherpa Consent Form

Consumer consent forms integrated into the user flow so agents can easily collect and document consent as part of the enrollment process

[Model Consent Forms Article](#)

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HealthSherpa Resources

Resources

[What's New Product Log](#)

Running list of product updates and releases

[Getting Started](#)

Short videos and a recap of this training

[Help Center](#) & [Centro de recursos para agentes](#)

Collection of articles about using your account

Keep an eye out for monthly newsletters and important announcements in your inbox!

The screenshot shows the HealthSherpa 'Clients' dashboard. The top navigation bar includes 'HealthSherpa', 'Health Sherpa NPN: 17169718', 'Start application', 'Search Marketplace', and a 'Quote On-Ex' dropdown menu. The left sidebar contains navigation options: Clients, Leads, Insights, Bonuses, Marketing, Agency, and Settings. The main content area has filters for Carrier, State, Documents, Payment, and Archived. A table lists 8 clients with columns for Client, Documents, Payment, and Actions. The 'Quote On-Ex' dropdown menu is open, showing options: 'What's new', 'Getting started', 'Help center', 'Email support', and '(888) 824-5763'. A blue circle highlights the dropdown menu, and a blue arrow points from the top right of the dashboard to the circle.

HealthSherpa Agent Support

HealthSherpa Agent Support provides top-tier support for your feature questions, technical issues, and any other questions about our platform.

Hours:

Special Enrollment Period (Jan-Oct): 6am- 4pm PST M-F

Open Enrollment Period (Nov-Dec): Extended Hours



1 (888) 684-1373



Email:
agent_support@healthsherpa.com



Chat from your
Agent Dashboard

Common Agent Questions

- What are DMIs and how do I resolve them? [Learn more here.](#)
- How do I upload follow-up documents? [Learn more here.](#)
- Where can I access eligibility letters and 1095A forms? [Learn more here.](#)
- Can I do split-policies on HealthSherpa? [Learn more here.](#)
- What happens if I encounter an error on HealthSherpa? [Learn more here.](#)
- How do I remove someone from an application who is aging into Medicare?
[Learn more here.](#)
- Why do I have to integrate my FFM account every 30-days? [Learn more here.](#)



Q&A

Thank you!