



= HAPPY AGENTS

Agility Insurance Services is pleased to announce their partnership with HealthSherpa, an innovative healthcare technology and the country's *largest* ACA agent enrollment platform.

HealthSherpa is a CMS-approved entity for Enhanced Direct Enrollment (EDE). Through a HealthSherpa account, you can track, enroll, and service all of your ACA clients — without going to healthcare.gov.

Benefits of using HealthSherpa

FAST

- No redirect to HC.gov
- No more waiting rooms
- No more 3-way calls with CMS
- Pre-populated renewal apps

AUTOMATED

- Bulk email marketing
- Branded enrollment site for your self-serve clients

QUOTE & ENROLL

- Shop and enroll from one all-inclusive site
- Eligibility notices
- Drug & provider search

MANAGE

- Upload documents for clients
- Resolve DMIs & upload docs.
- Real-time status & notifications
- Make first payment
- Report life changes
- Document retrieval (e.g. 1095As)
- Add any Marketplace client

MORE

- Maintain consumer relationship
- Year-round technology support
- Track client activity
- Referral bonus program
- Reporting & analytics

What is EDE?

EDE (Enhanced Direct Enrollment) is a powerful new technology that simplifies the enrollment process and provides complete policy management functionality—without going to Healthcare.gov.

HealthSherpa stats

- Enrolled 3M+ consumers
- Last OEP 1.2M lives enrolled through active agent enrollments
- Used by 36,000 agents and 4,800 Agencies
- Support 100% EDE-approved carriers
- 20% higher effectuation vs. DE*
- 14% higher self-serve rate vs. DE*
- 8 min application vs. 30 min DE*

*DE = Direct Enrollment

Your join code

To join the **Agility Insurance Services** account as an agent, sign up at HealthSherpa.com and use the join code b4fd.

\$0.00* = Your cost to participate

*No, seriously. It's free!

Create your account
Join code: b4fd



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

Personal Info

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

FIRST NAME
Zoe

LAST NAME
Sherpa

COMPANY NAME
HealthSherpa

PHONE NUMBER
(555) 555-5555

Step 1

Choose Agency settings. If you are an independent agent, and do not want to join / create an agency, please choose the 3rd option.

Agency

There are a few different ways to set up your account. Please select the account type you prefer based on the scenario that applies to you. You can always do this later from your Account Settings page.

Please select the scenario that applies to you

I want to create a **new** agency account and I am the owner or admin of the agency

I am an agent joining an agency with a JOIN code

I am an agent and the other options don't apply to me

Step 2

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.**

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

Add another state

Alabama

Blue Cross And Blue Shield Of Alabama

Bright Health

Step 3

Enter your FFM username (this is the same username you use to log into portal.cms.gov) and verify your NPN. Please note you must enter in your personal address - not business address.

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
zoesharpa

NPN
99999999

Step 4

Opt into the referral program - this allows you to get paid \$25 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.

Refer clients for cash

When you enroll your client in a plan from a carrier you're not appointed with, we'll pay you **\$25 cash**

And **we only sell ACA** — so you can keep the client for any other products you offer.

[Learn more](#)

Turn on referrals

By turning this on, HealthSherpa will track & pay you for non-appointed applications

On Off

Edit this setting from the referrals page any time.

Step 5

Please verify your NPN

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

Individual
Agency

National producer number (NPN) edit
99999999

First name
Zoe

Last name
Sherpa

Date of birth
mm/dd/yyyy

Social security number
XXX-XX-XXXX

Step 6

That's it! You will then be directed to your client dashboard. Please review our other FAQ's for instructions on using all of the features on our dashboard.