

HEALTH SHERPA SIGN UP INSTRUCTIONS

Sign Up Link: https://www.healthsherpa.com/agents/new?_referring_agent_id=peek-performance

Join Code: d57b

VERY IMPORTANT!!!! - In order to create a profile where you will receive **FREE enrollments**, you must select **“I am an agent joining an agency with a JOIN code”** on the **AGENCY** page of the sign-up process. If you choose the first option to “create a new agency account”, you will not be connected to the PPI Health Sherpa account, and you will be charged for each enrollment you submit. (See pages 2&3 of this pdf for screen shots.)

The screenshot shows a sign-up form titled "Sign up for free". The form includes an "EMAIL" field, a "PASSWORD" field with a "Show" toggle, and a "Sign Up" button. Below the button is a disclaimer: "By signing up, you attest that you agree with our Terms of Service, and consent to receiving emails from HealthSherpa." A blue callout box on the right contains the following instructions:

1. ENTER YOUR EMAIL
2. CREATE A PASSWORD
3. CLICK SIGN UP

A red arrow points from the "Sign Up" button to the third instruction in the callout box.

The screenshot shows a "Welcome!" page with the heading "Welcome!". Below the heading is the text: "To get your account set up and enrolling clients right away, we'll ask you a few quick questions". There are five steps listed, each with a blue circular icon:

- Personal**: We'll need some basic information to create your account
- Agency**: Create an agency or join another agency
- Carriers**: Select the carriers you're appointed with
- Compliance**: We'll need to verify some of your information including your NPN and FFM certification
- Branding**: Upload your logo for personalized branding on your client-facing site

At the bottom of the page is a blue "Get Started" button. A red arrow points from the "Get Started" button to the text "Click 'Get Started'" on the right side of the page.

Click "Get Started"

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

FIRST NAME

LAST NAME

COMPANY NAME

PHONE NUMBER
(NNN) NNN-NNNN

Enter your personal info, and click "continue"

VERY IMPORTANT!

This section will ask you to select the scenario that applies to you. In order to create a profile where you will receive FREE enrollments, you must select **"I am an agent joining an agency with a JOIN code."** Scroll to page 3 to see the JOIN code page.

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

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.

JOIN CODE

d57b

Back Continue

Enter the JOIN CODE **d57b**, and click "continue"

Carriers

Which carriers are you currently appointed with? You can always do this later and update in your settings.

Select the carriers you are appointed with in each state

Add a state

Back 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

NPN

Back Continue