

HEALTH SHERPA SIGN UP INSTRUCTIONS

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

Join Code: d57b

VERY IMPORTANT - You must select **“Join an existing agency”** on the AGENCY page of the sign-up process to be connected to the PPI Health Sherpa account. *If you choose the first option to “create a new agency account”, you will not be connected to the PPI Health Sherpa account. (See page 2 of this pdf for screen shots.)*

The screenshot shows a sign-up form titled "Sign up for free". On the left, there is a sub-header and a paragraph: "Process enrollments and renewals, manage leads and strengthen your overall business with the power of HealthSherpa's Agent Tools behind you." The form fields include "EMAIL" and "PASSWORD" (with a "Show" toggle). Below the fields is a blue "Sign Up" button. A red arrow points from a blue callout box on the right to the "Sign Up" button. The callout box contains the following instructions:

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

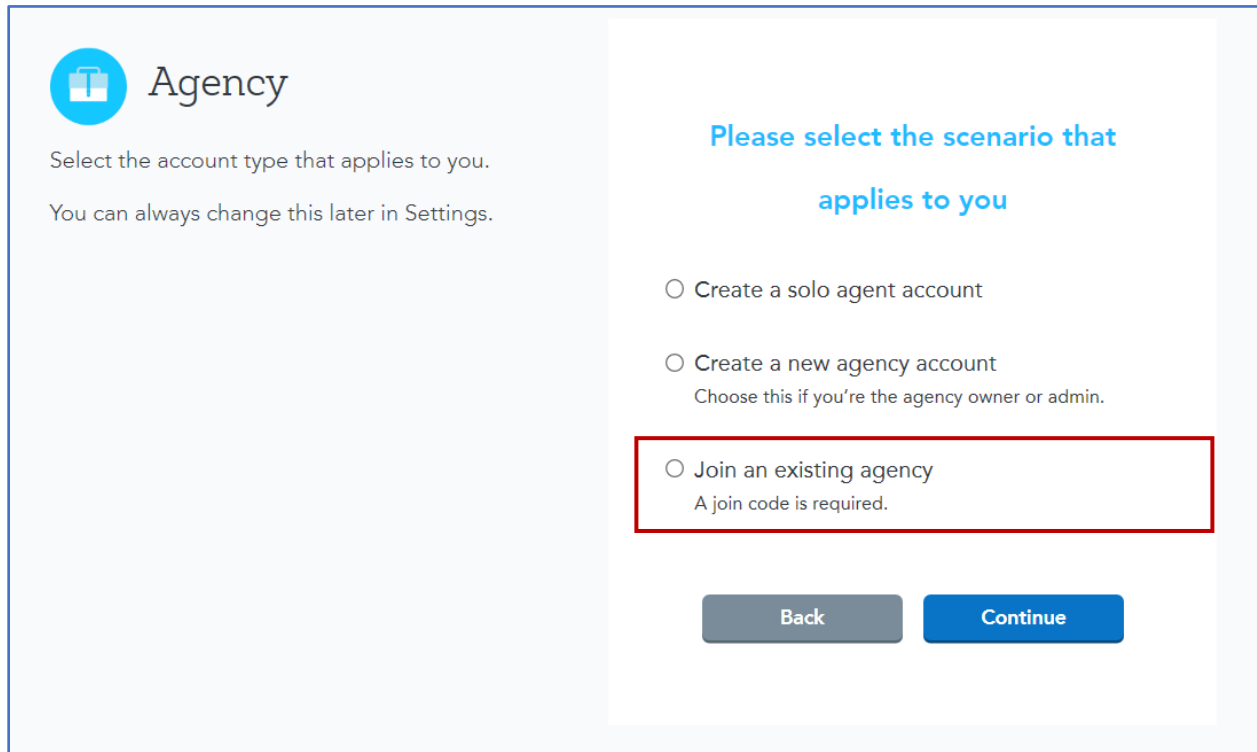
Below the "Sign Up" button, there is a disclaimer: "By signing up, you attest that you agree with our Terms of Service, and consent to receiving emails from HealthSherpa."

The screenshot shows a "Personal Info" form. On the left, there is a sub-header and a paragraph: "We'll need some basic information so we can get your account created." The form fields include "FIRST NAME", "LAST NAME", "COMPANY NAME", and "PHONE NUMBER" (with a placeholder "(NNN) NNN-NNNN"). Below the fields are two buttons: "Back" and "Continue". A red arrow points from the "Continue" button to the text on the right.

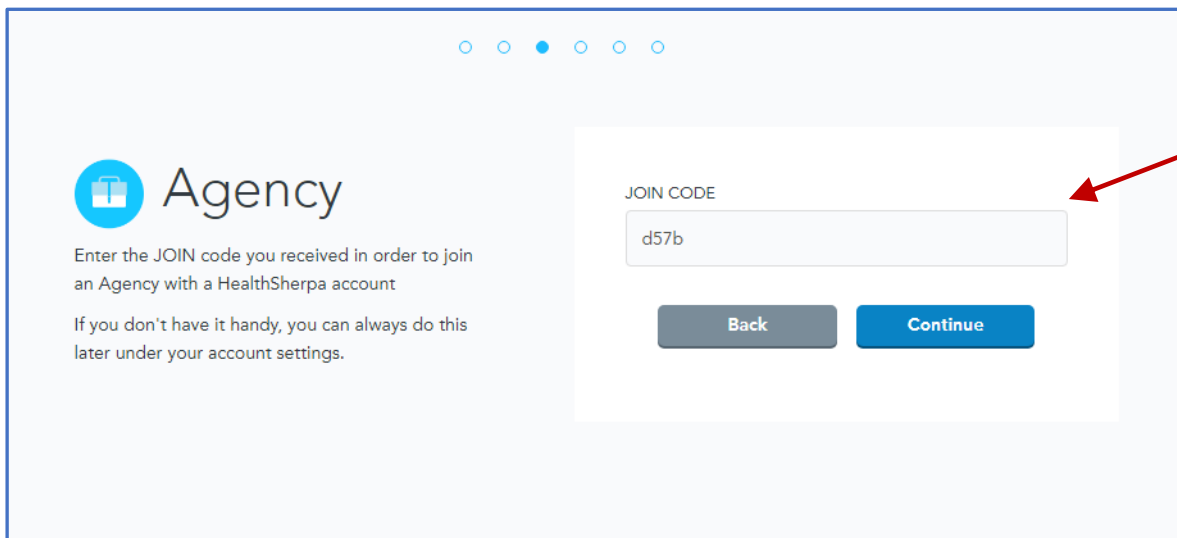
Enter your personal info, and click "continue"

JOIN CODE:

This section will ask you to select the scenario that applies to you. In order to create a profile connected to PPI, you must select **“Join an existing agency.”**



The screenshot shows the 'Agency' selection screen. On the left, there is a blue circular icon with a white briefcase and the word 'Agency' in a large font. Below it, the text reads: 'Select the account type that applies to you. You can always change this later in Settings.' On the right, there is a white box with a blue border containing the instruction: 'Please select the scenario that applies to you'. Below this instruction are three radio button options: 'Create a solo agent account', 'Create a new agency account' (with a sub-note: 'Choose this if you're the agency owner or admin.'), and 'Join an existing agency' (with a sub-note: 'A join code is required.'). The 'Join an existing agency' option is highlighted with a red rectangular border. At the bottom of the white box are two buttons: a grey 'Back' button and a blue 'Continue' button.



The screenshot shows the 'Agency' join code entry screen. On the left, there is a blue circular icon with a white briefcase and the word 'Agency' in a large font. Below it, the text reads: '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.' On the right, there is a white box with a grey border containing a text input field labeled 'JOIN CODE' with the value 'd57b' entered. Below the input field are two buttons: a grey 'Back' button and a blue 'Continue' button. A red arrow points from the text on the right towards the 'Continue' button.

Enter the JOIN CODE **d57b**, and click “continue”

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Refer clients for cash

When you enroll your client in a plan from a carrier you're not appointed with, we'll pay you **\$100** during OEP and \$50 during SEP.

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

[Learn more](#)

Do you want to refer non-appointed carriers to us and get paid **\$50** per application?

Yes No

You can change this setting at any time.

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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

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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