



HealthSherpa 101

June, 2026

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Agenda

HealthSherpa overview

Account setup

Platform demonstration

HealthSherpa resources

Q&A

HealthSherpa overview

Empowering agent success



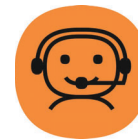
Comprehensive enrollment tools

- Simple to shop & apply
- Transparency into the enrollment submission journey
- Personalized marketing tools
- Consent and fraud features to help you stay compliant



Training

- Platform training to learn our tools
- Webinars focused on specialized topics & industry changes
- Agent help center



Support

- Dedicated Agent Support team
- Available by phone, email, and chat
- Extended hours during OE

Account setup

Create or log into your account

Licensed Agents can choose from [different account types](#) based on how they want to provide enrollment support.

Account creation is free and often takes only a few minutes. If you are part of an agency, you will need the agency's unique join code to link to their downline.

Account creation and setup steps vary depending on the account type selected.

Welcome to HealthSherpa

Create a free agent account

Supercharge your business with HealthSherpa's Agent Tools - process enrollments, streamline renewals, and manage your leads.

Email

Password

Password strength

Weak

- ✗ Eight or more characters
- ✗ Number or symbol
- ✗ Capitalized letter

By signing up, you attest that you agree with our [Terms of Service](#), and consent to receiving emails from HealthSherpa

Create agent account

Want to write Medicare? [Sign up](#) for a Healthsherpa for Medicare account

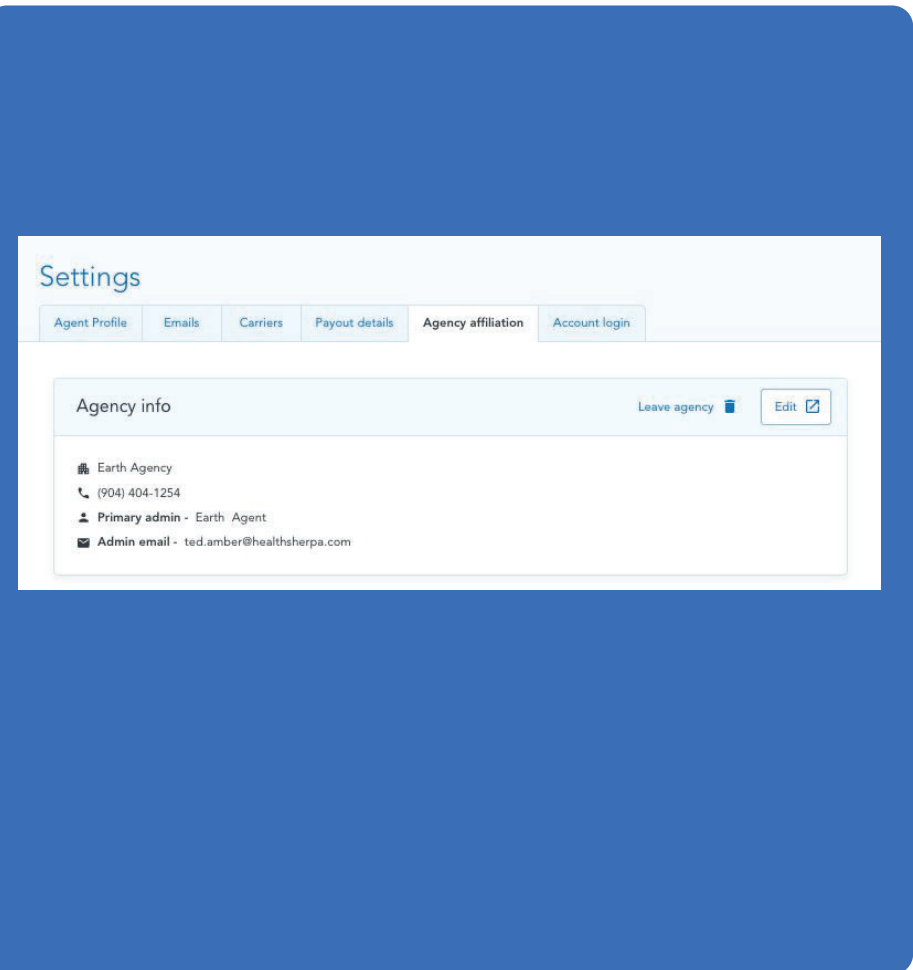
Joining Risk Placement Services/Savoy

To fully connect to Risk Placement Services/ Savoy, agents must enter the agency join code in the Agency Affiliation section within their settings.

Join Code: **89217428**

See a different agency associated? You may reach out to the agency admin and request a release to be removed from that agency and join **Risk Placement Services/ Savoy**.

If you are under a carrier platform please reach out to Risk Placement Services/ Savoy for further guidance.

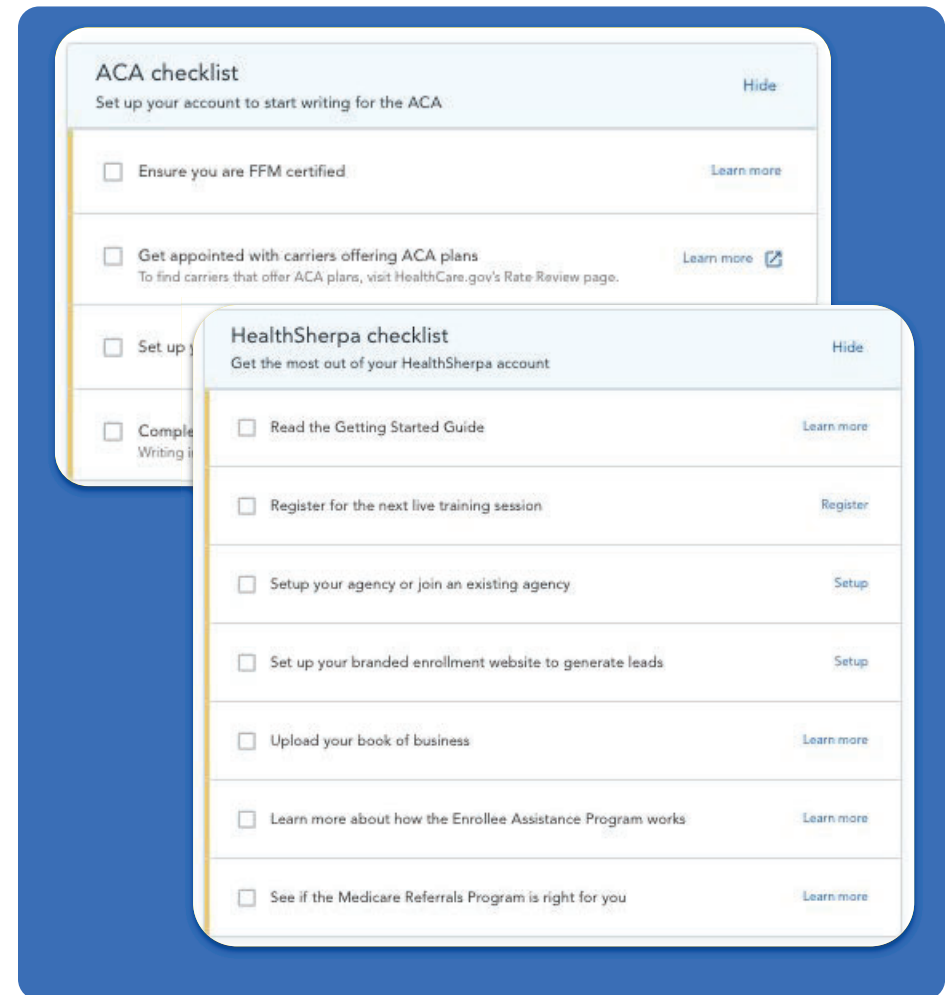


Onboarding checklist

After you create your account, check out our [Agent Onboarding Checklist](#) to ensure your account is set up correctly.

Depending on the HealthSherpa account type selected, agents may need to:

1. Integrate your Federally Facilitated Marketplace (FFM) Account
2. Enable Enhanced Direct Enrollment (EDE)
3. Decide whether to participate in the Enrollee Assistance Program (EAP)
4. Update carrier settings

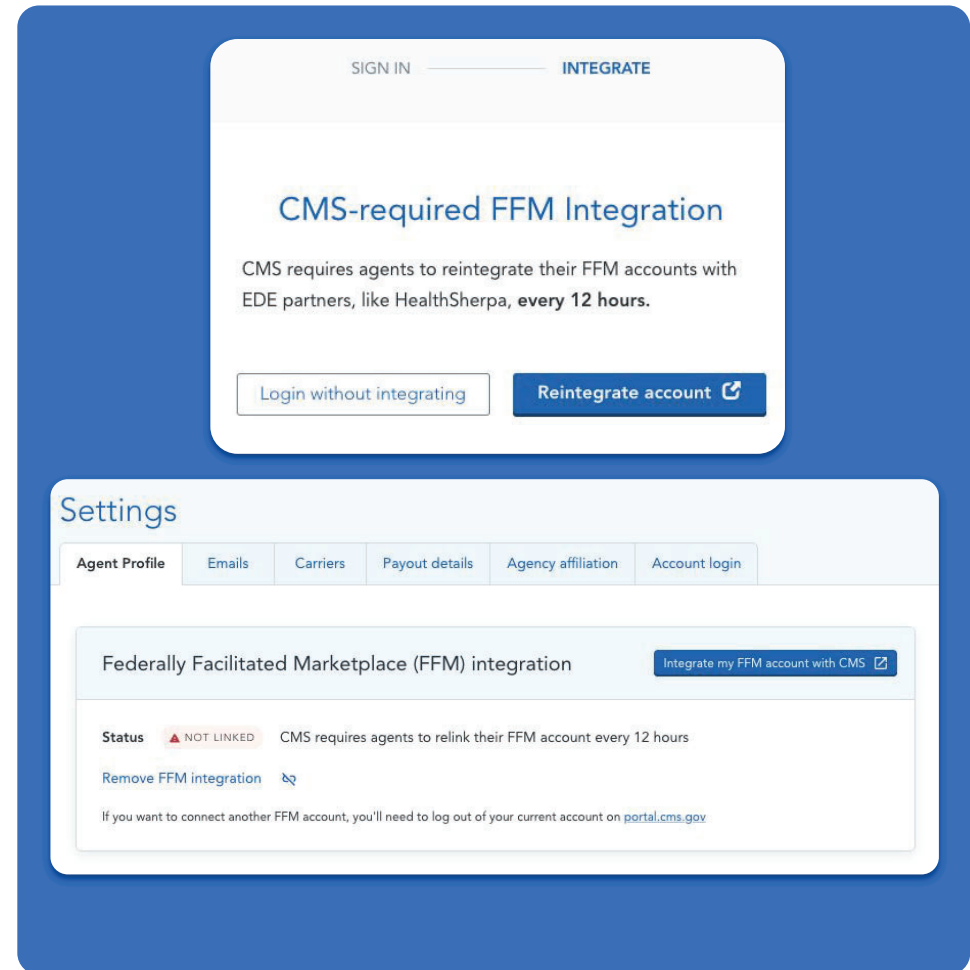


Integrate your FFM account

Centers for Medicare & Medicaid Services (CMS) requires agents using HealthSherpa (and all EDE partners) to have active [integration with their Federally Facilitated Marketplace \(FFM\) account](#).

Agents without an active integration will not be able to search the Marketplace, submit applications, or view clients.

Only the account-owning licensed agent may log in to their HealthSherpa account, use their CMS Enterprise Portal credentials, and complete or renew FFM account integration. Credential sharing is not allowed.



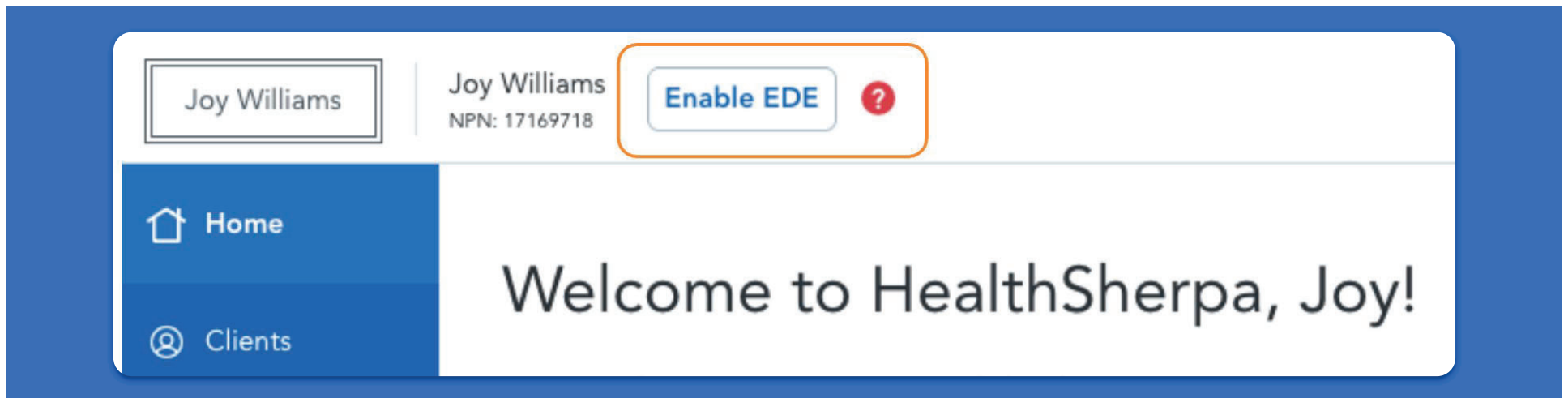
Enable EDE

Overview

Enhanced Direct Enrollment (EDE) is a CMS-approved technology that creates a secure backend connection to the Marketplace.

Benefits

EDE allows agents to complete ACA enrollments directly in HealthSherpa, submit follow-ups, manage updates, and more. To access all EDE features, agents must complete the free [EDE approval process](#).

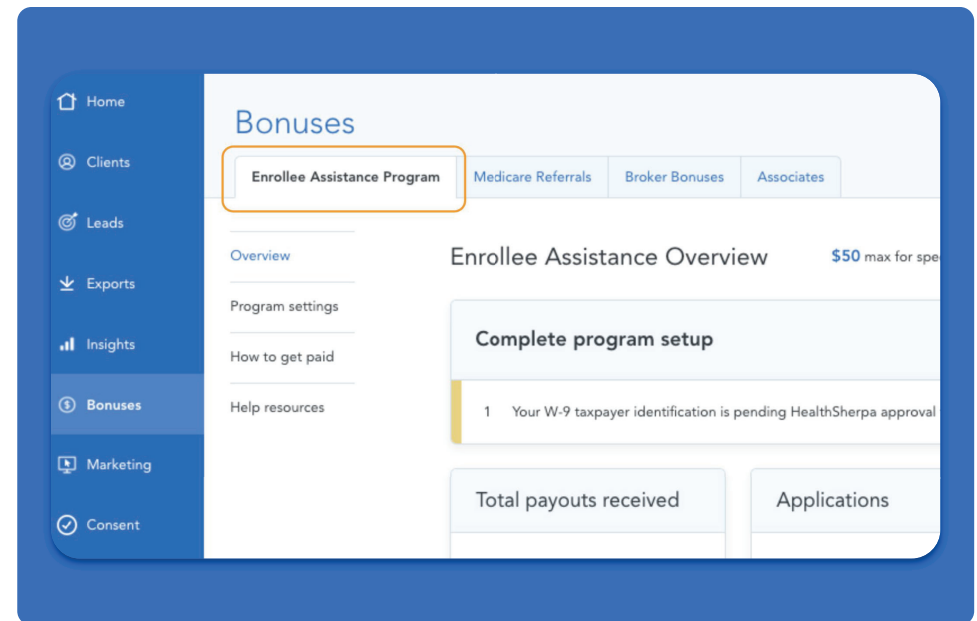


The Enrollee Assistance Program (EAP)

The HealthSherpa [Enrollee Assistance Program \(EAP\)](#) gives agents a way to partner with HealthSherpa to help ensure consumers have a smooth Affordable Care Act (ACA) enrollment experience.

Applications submitted using EAP are processed using HealthSherpa's National Producer Number (NPN)

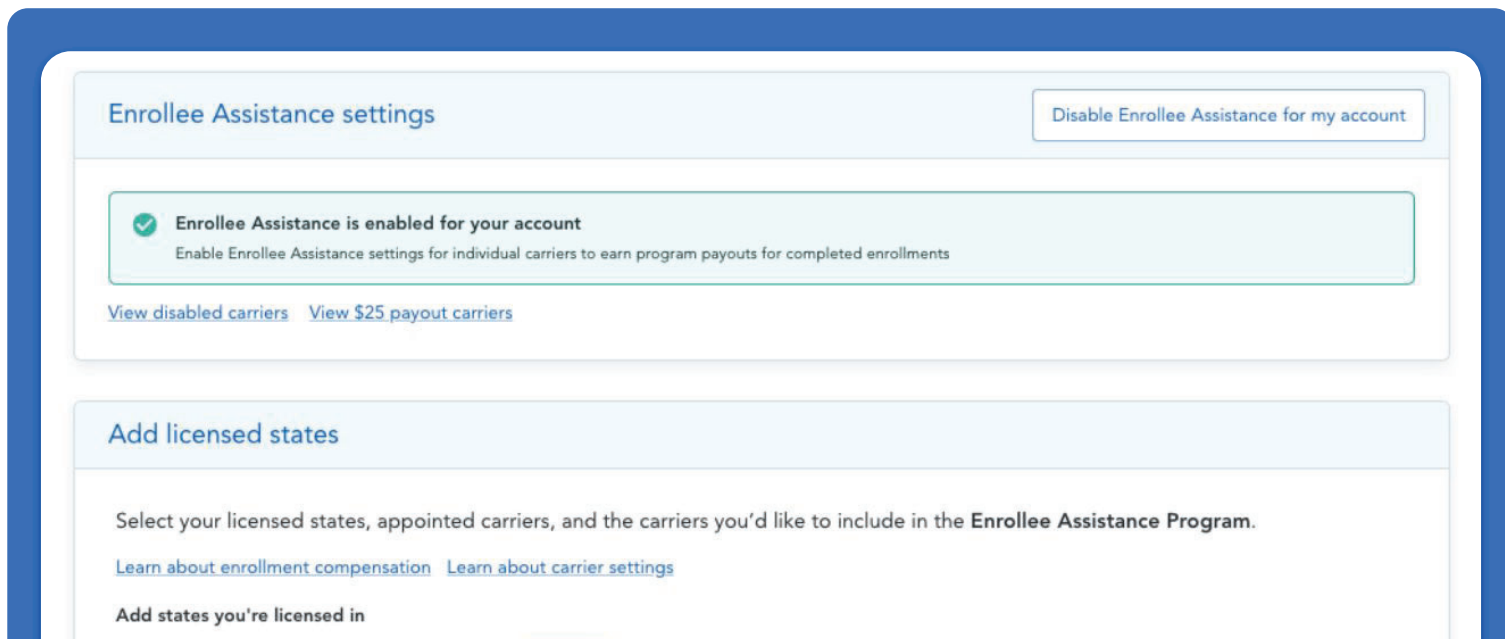
HealthSherpa compensates participating agents at the time of enrollment.



Update carrier settings

The [Carriers tab](#) allows agents to manage licensed states, indicate carrier appointments, and manage EAP carriers when EAP is enabled.

The Carriers tab can be accessed from the Settings page or the Bonuses page.



The screenshot shows the 'Enrollee Assistance settings' page. At the top, there's a header 'Enrollee Assistance settings' and a button 'Disable Enrollee Assistance for my account'. Below this, a green checkmark icon indicates 'Enrollee Assistance is enabled for your account'. A sub-header 'Add licensed states' is followed by instructions to select licensed states, appointed carriers, and carriers to include in the program. There are two links: 'Learn about enrollment compensation' and 'Learn about carrier settings'. At the bottom, there's a section titled 'Add states you're licensed in' with a text input field.

Enrollee Assistance settings [Disable Enrollee Assistance for my account](#)

✓ **Enrollee Assistance is enabled for your account**
Enable Enrollee Assistance settings for individual carriers to earn program payouts for completed enrollments

[View disabled carriers](#) [View \\$25 payout carriers](#)

Add licensed states

Select your licensed states, appointed carriers, and the carriers you'd like to include in the **Enrollee Assistance Program**.

[Learn about enrollment compensation](#) [Learn about carrier settings](#)

Add states you're licensed in

HealthSherpa resources

Additional training sessions

Register for any of our upcoming training sessions or watch recordings of recent sessions by visiting our [Agent Training](#) page:

- HealthSherpa 101
- New to ACA

Watch recent webinars:

- Post-enrollment: ensure your consumers effectuate
- Follow-up documentation
- Special Enrollment Periods (SEPs)

HealthSherpa for Agents MAY 2026						
SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
					1	2
5	4	5	6	7	8	9
10	11	12 • HEALTHSHERPA 101	13 • NEW TO ACA	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

Resources

[What's New](#) Running list of product updates and feature releases

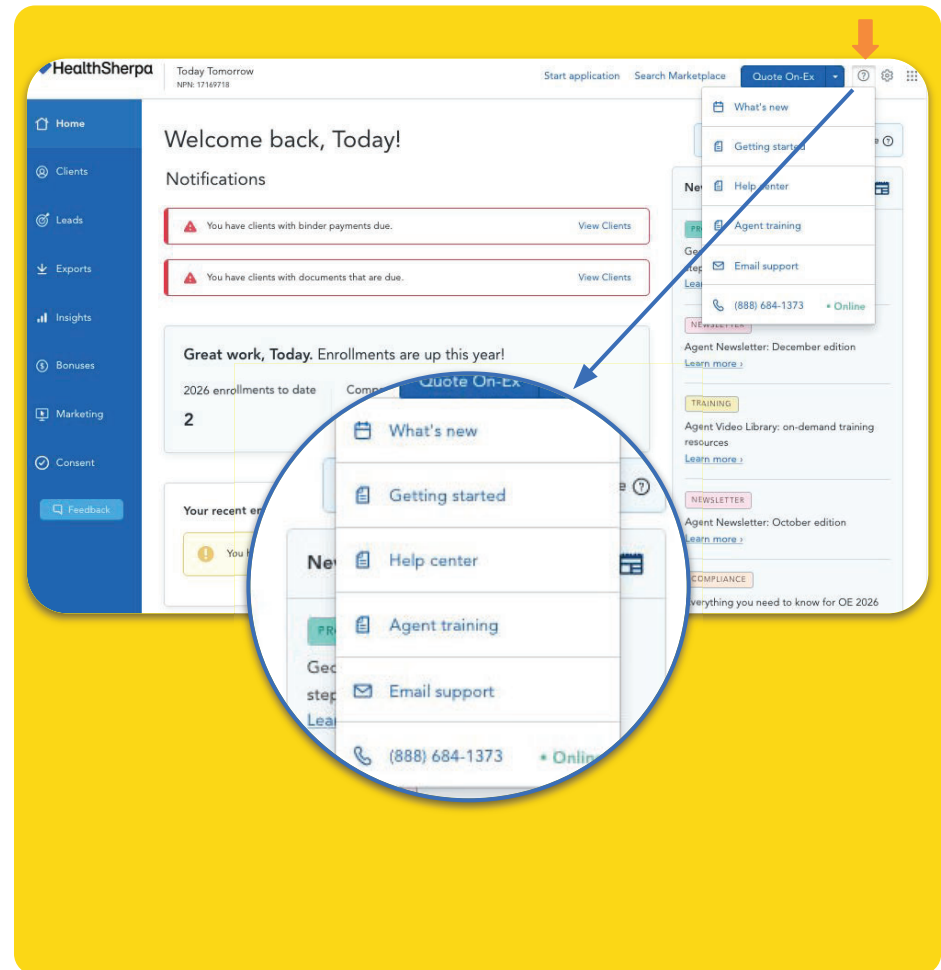
[Getting started](#) New user guide

[Help center](#) Collection of articles about using your account.

[Agent training](#) join upcoming training sessions

Contact the HealthSherpa Agent Support Team

Keep an eye on your email inbox we share monthly newsletters and important announcements

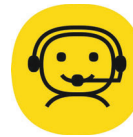


HealthSherpa Agent Support

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

Standard hours:

- Phone: 6am- 4pm PST M-F
- Email & Chat: 6am- 2:30pm PST M-F



1 (888) 684-1373



**agent_support@
healthsherpa.com**



**Chat from your
Agent Dashboard**

Common agent questions

- I am new to the ACA. How do I learn more about getting started? [Learn more here.](#)
- Where can I learn more about the enrollment journey? [Learn more here.](#)
- Can I write applications outside of Open Enrollment? [Learn more here.](#)
- How do I upload follow-up documents? [Learn more here.](#)
- Is HealthSherpa able to help me manage customer consent? [Learn more here.](#)
- I have an agency. Does HealthSherpa have any Agency related features? [Learn more here.](#)

Thank you!