



= 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.

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.

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 allinclusive 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

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

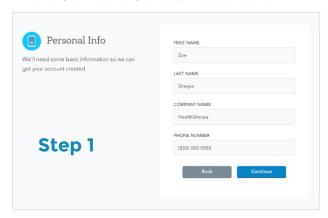
To join the **Agility Insurance** Services account as an agent, sign up at HealthSherpa.com and use the join code b4fd.

\$0.00* = Your cost to participate *No, seriously. It's free!

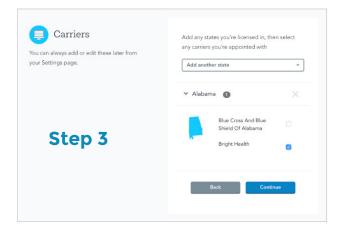
Create your account Join code: b4fd



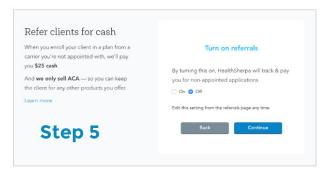
Then, enter in your name, company name, and preferred phone number.



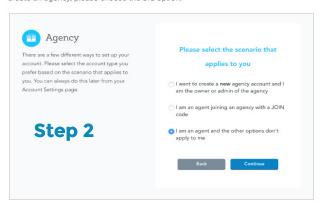
Add the states you are licensed in, and the check off the carriers you are appointed with. It is very important that this is accurate and up-to-date at all times.



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.



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



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	FFM USERNAME
This information is needed in order to verify	zoesherpa
compliance and to make sure the carrier sees you on enrollments from the exchange.	NPN
Your FFM Username is the same login name you use when logging into portal.cms.gov.	99999999
Not FFM certified? Try our refer-only account	Back
Step 4	

	r Number with the National Insurance rotect you and your clients when using
Individual	Agency
National producer number (NPN) e	dit
99999999	
First name	
Zoe	
Last name	
Sherpa	
Date of birth	
mm/dd/yyyy	
Social security number	

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.