

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.)*

Sign up for a free agent account

Process enrollments and renewals, manage leads and strengthen your overall business with the power of HealthSherpa's Agent Tools behind you.

EMAIL

PASSWORD Show

Sign Up

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

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

Personal Info

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

FIRST NAME

LAST NAME

COMPANY NAME

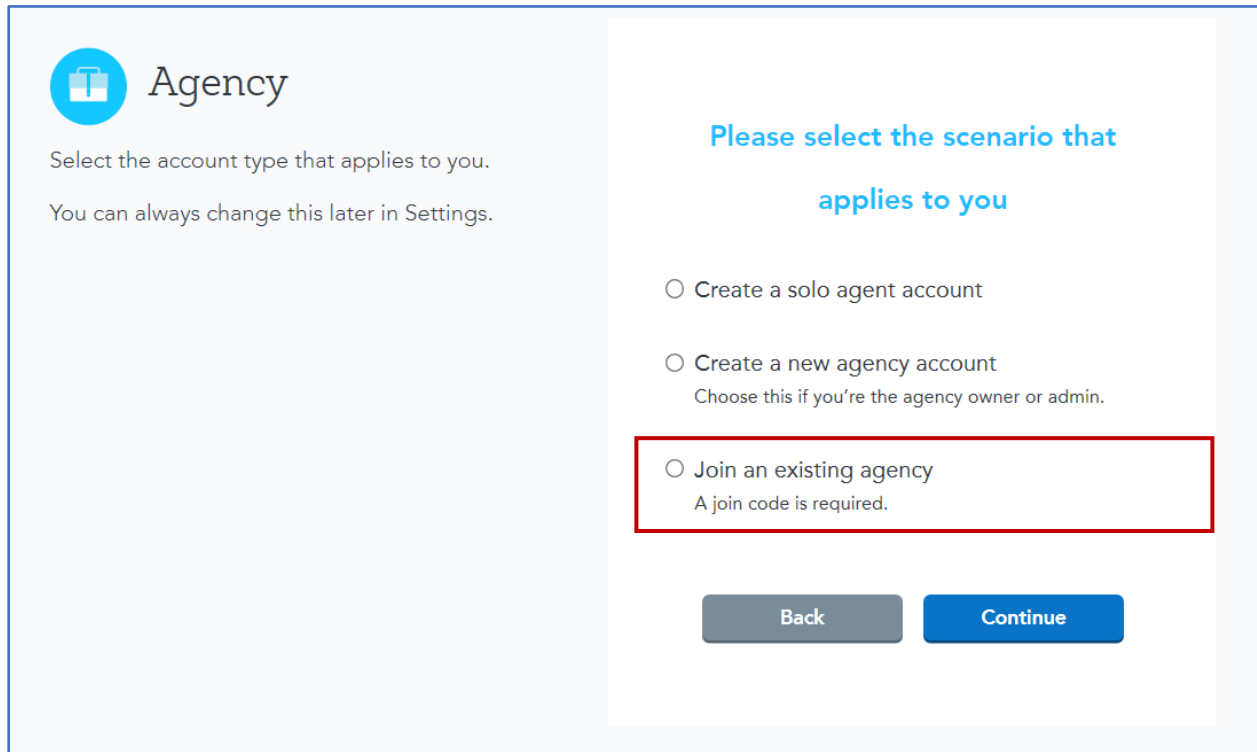
PHONE NUMBER
(NNN) NNN-NNNN

Back Continue

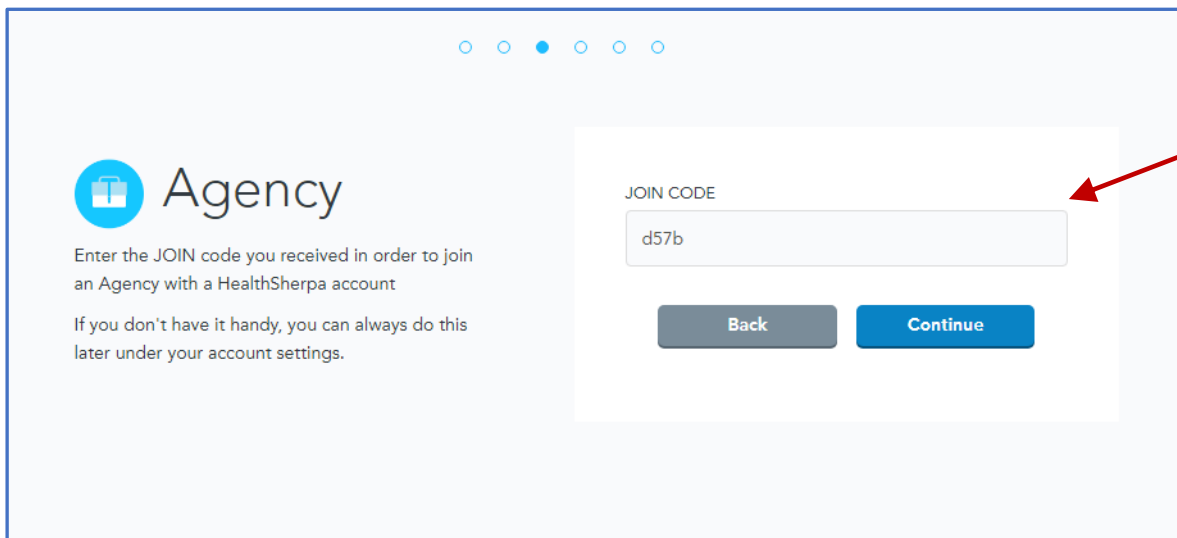
Enter your personal info, and click “continue”

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'. Below it, the text reads: 'Select the account type that applies to you. You can always change this later in Settings.' On the right, the heading says 'Please select the scenario that applies to you'. There 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 box. At the bottom, there are two buttons: 'Back' (grey) and 'Continue' (blue).



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'. 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 the heading 'JOIN CODE' and a text input field containing 'd57b'. Below the input field are two buttons: 'Back' (grey) and 'Continue' (blue). A red arrow points from the text on the right towards the input field.

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

Refer clients for cash

Get paid faster! Refer applications from any carriers that you choose.

During SEP, we pay a \$50 bonus, and during OEP we pay **\$100-\$120**.

How it works:

- Choose the carriers you'd like to refer.
- When you submit applications under those carriers, we become AOR.
- We pay you a referral bonus within 60 days!

View full program details [here](#).

Referrals setting

On Off

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 ([Forgot username?](#))

NPN ([Forgot npn?](#))