



BlueCross. BlueShield.
Illinois • Montana • New Mexico
Oklahoma • Texas

October 2022

Producer Guide

Retail Producer Portal Guide: Broker On-exchange Enrollment Solution Powered by HealthSherpa

The Retail Producer Portal now offers a broker-assisted On Exchange enrollment solution to meet the needs of their clients. Powered by HealthSherpa, this flow will allow a broker to quote and enroll their clients exclusively in Blue Plans, via the Enhanced Direct Enrollment pathway.

[This section will cover how to access this solution in RPP, creating an account, onboarding, enabling EDE and signing in.](#)

Blue Cross and Blue Shield of Illinois, Blue Cross and Blue Shield of Montana, Blue Cross and Blue Shield of New Mexico, Blue Cross and Blue Shield of Oklahoma, and Blue Cross and Blue Shield of Texas, Divisions of Health Care Life Corporation, a Mutual Legal Reserve Company, an Independent Licensee of the Blue Cross and Blue Shield Association

Accessing the Broker On Exchange Enrollment Solution in RPP:

For first time Account creation:

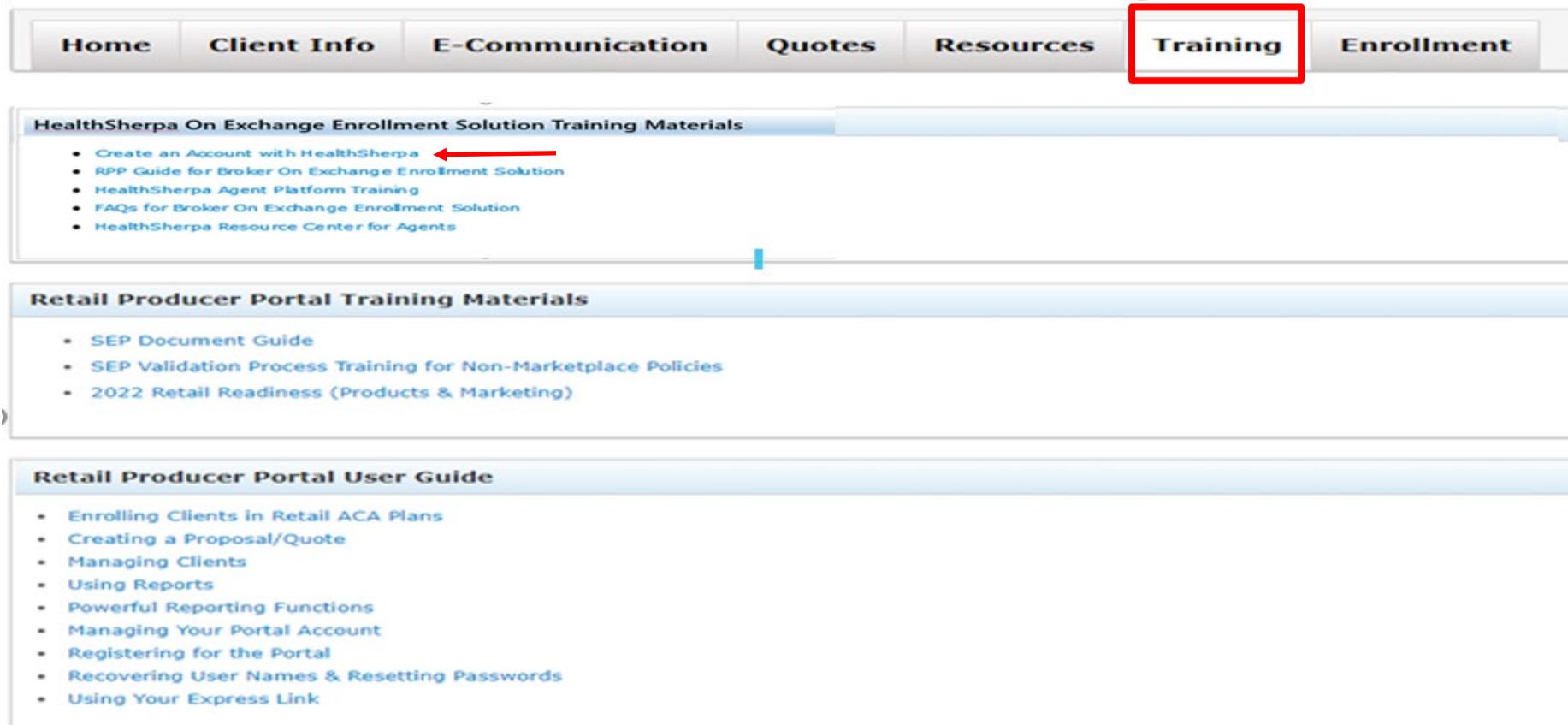
Log into RPP.

Select the Major Medical context.

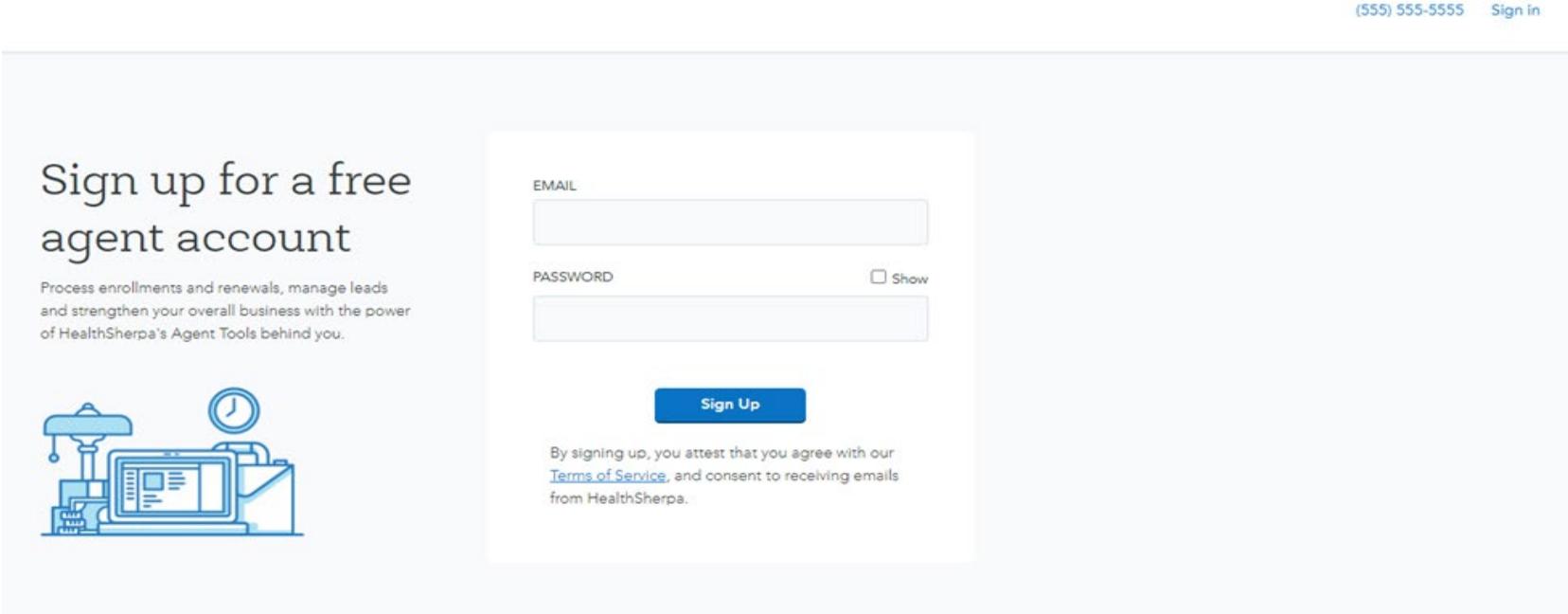
Access the “Training” tab.

Under the “HealthSherpa On Exchange Enrollment Solution Training Materials” section, click on “Create an Account with HealthSherpa”.

You will be redirected to the HealthSherpa landing page.



- o HealthSherpa Landing Page:



Access while working with a client:

- Log into RPP.
- Select the Major Medical Context.
- Access the “Quotes” tab.

If you would like to run a quote for your client first, filter to the “On-Exchange” tab on the plan results page.
 Click on “Apply for this Plan” button.
 You will be redirected to the HealthSherpa Sign In page.

The screenshot shows a web interface for plan selection. On the left, there are filter controls for Premium Maximum, Out of Pocket Maximum, Annual Individual Deductible, Co-insurance %, and PCP Co-pay. At the top, there are tabs for 'Off-Exchange' and 'On-Exchange', with the latter being selected and highlighted by a red box. To the right of the tabs are buttons for 'Save Proposal', 'Send Quote', and 'View Additional Benefits'. Below the tabs, a blue banner indicates 'Viewing 14 of 14 matching plans.' Two plan cards are visible. The first card is for 'Blue Advantage Bronze HMO 204' and includes a table with the following data:

Network	Deductible	Out-of-Pocket	Coinsurance	Office Visit	Premium
Blue Advantage HMO	\$6,000	\$8,700	50%	\$45 Copay	\$334.95

Below the table for the first plan, there is a 'Dental Coverage' section with radio buttons for 'Yes' and 'No', and an 'Apply for this Plan >' button. A red arrow points to this button. The second plan card is for 'Blue Advantage Bronze HMO 301' and includes a table with the following data:

Network	Deductible	Out-of-Pocket	Coinsurance	Office Visit	Premium
Blue Advantage HMO	\$8,700	\$8,700	100%	0% Coinsurance after Deductible	\$326.65

Below the table for the second plan, there is a 'Dental Coverage' section with radio buttons for 'Yes' and 'No', and an 'Apply for this Plan >' button.

If you are ready to begin the enrollment, you can click the Enroll in On Exchange QHPs button to reach the HealthSherpa sign in page.

- HealthSherpa Sign In Page:

Sign into your
account

EMAIL ADDRESS

PASSWORD

[Sign in](#)

[Forgot your password?](#)

[Privacy Notice and Terms & Conditions](#)

Creating an Account and Onboarding:

For first time Account Creation:

Enter your Email address to use for this account.

- **Note:** If you already have a HealthSherpa Marketplace account, you'll need to use a **different email address** for your new RPP-linked account.

Enter a Password.

Click the "Sign Up" button.

(555) 555-5555 [Sign in](#)

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.

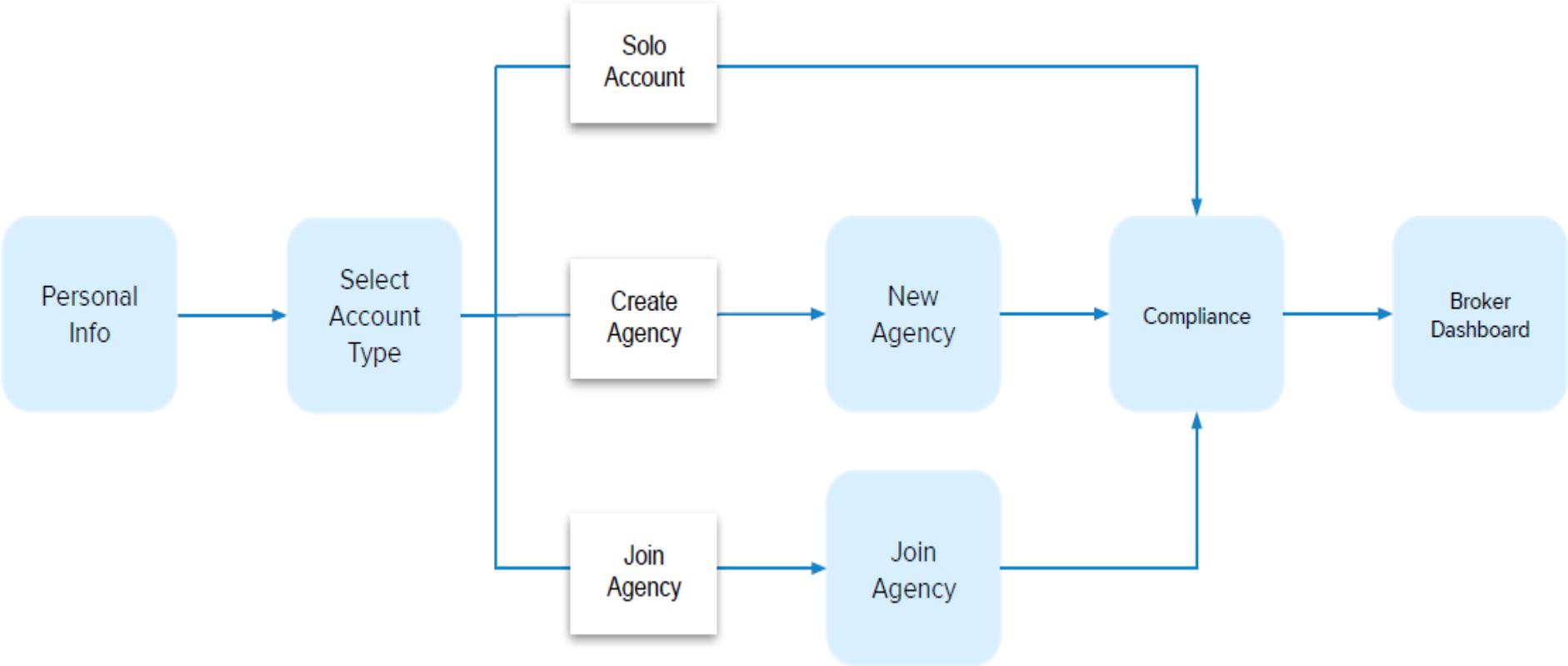


Show

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

Onboarding:

You will be prompted to confirm and/or enter your information, such as name, contact information, NPN, and agency affiliation.



Personal Info: Enter your information into the fields listed.

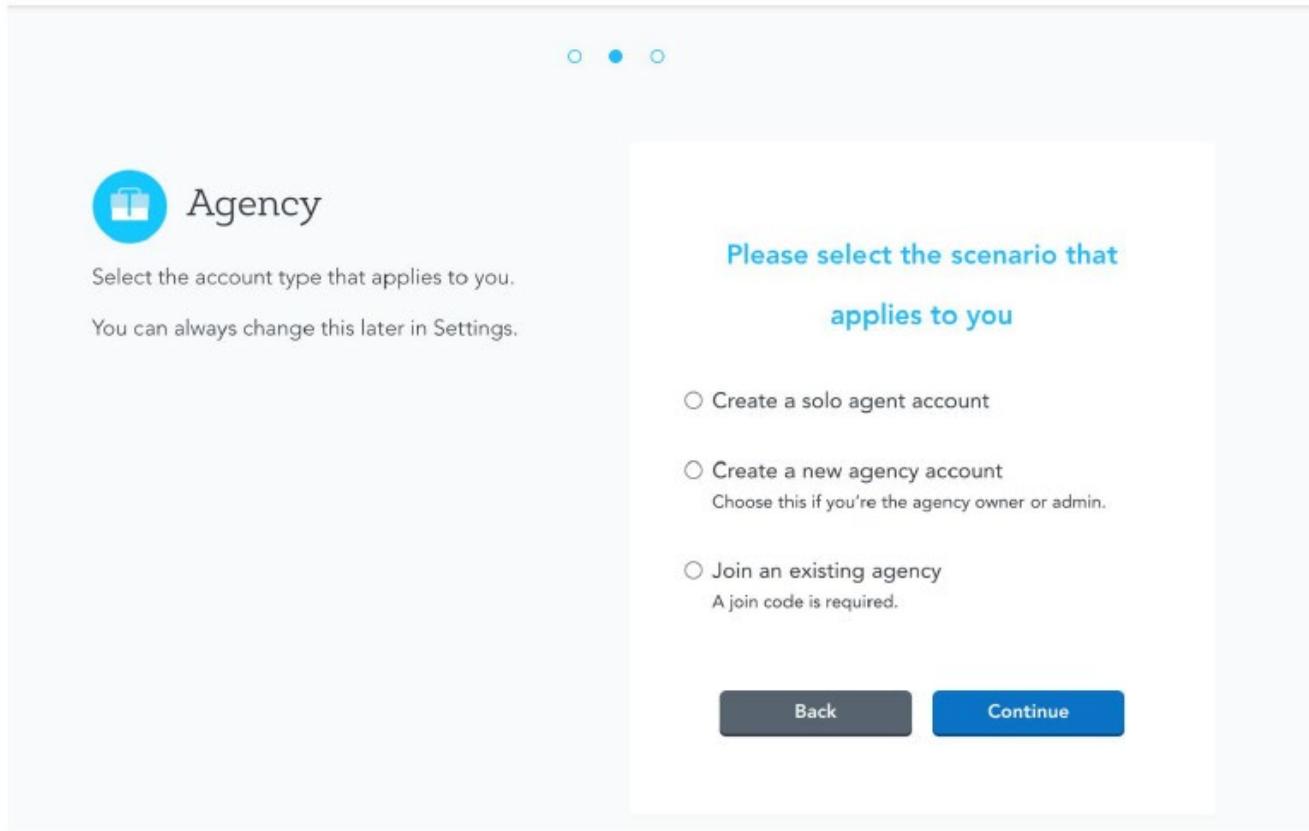
The screenshot shows a web form titled "Personal Info" with a sub-header "We'll need some basic information so we can get your account created." The form includes input fields for "First Name", "Last Name", "Company Name", and "Phone Number" (with a placeholder "(XXX) XXX-XXXX"). Below these is a section "HOW DID YOU FIRST HEAR ABOUT US?" with radio button options: "An Agent Recommended You", "I Did A Web Search", "I Received An Email", "I Took HealthSherpa FFM Training", "An Agency Recommended You", "I Received A Sales Call", "I Saw You On Healthcare.Gov", and "Other". At the bottom are "Back" and "Continue" buttons.

Account Type:

Next, select an account type. There are three options:

- Solo agent – this will be the most frequently selected option.
- New agency account [for Principals and Administrators]
- Join an existing agency – if you're unsure whether your agency has an account, create a Solo account and you can join the agency later.

Note: setting up an agency account on HealthSherpa does not affect the terms of your Producer Agreement with HCSC in any way.



The screenshot shows a web interface for selecting an account type. On the left, there is a blue circular icon with a white briefcase, followed by the word "Agency". Below this, the text reads: "Select the account type that applies to you. You can always change this later in Settings." On the right, a white panel contains the heading "Please select the scenario that applies to you" in blue. Below the heading 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."). At the bottom of the panel are two buttons: a grey "Back" button and a blue "Continue" button.

New Agency: Enter the new agency's name and phone number.

- You will be designated as the agency administrator and have special privileges, such as inviting individuals to the agency via a join code and viewing clients for all broker accounts within this agency.
- For more information on setting up a new agency account, please reference the [HealthSherpa guide](http://faq.healthsherpa.com/en/articles/2789529-agency-accounts) for this feature at <http://faq.healthsherpa.com/en/articles/2789529-agency-accounts>.

The screenshot shows a web interface for creating a new agency. On the left, there is a blue circular icon with a white building symbol, followed by the word "Agency" in a large, dark font. Below this, there is a paragraph of text explaining the role of an Agency Admin. On the right, there is a white form with two input fields: "Agency Name" containing "HS Agency, Inc." and "Agency Phone" containing "(215) 834-7239". At the bottom of the form are two buttons: a dark grey "Back" button and a blue "Continue" button.

Join Agency: Enter the agency's "join code" provided by the agency administrator.

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.

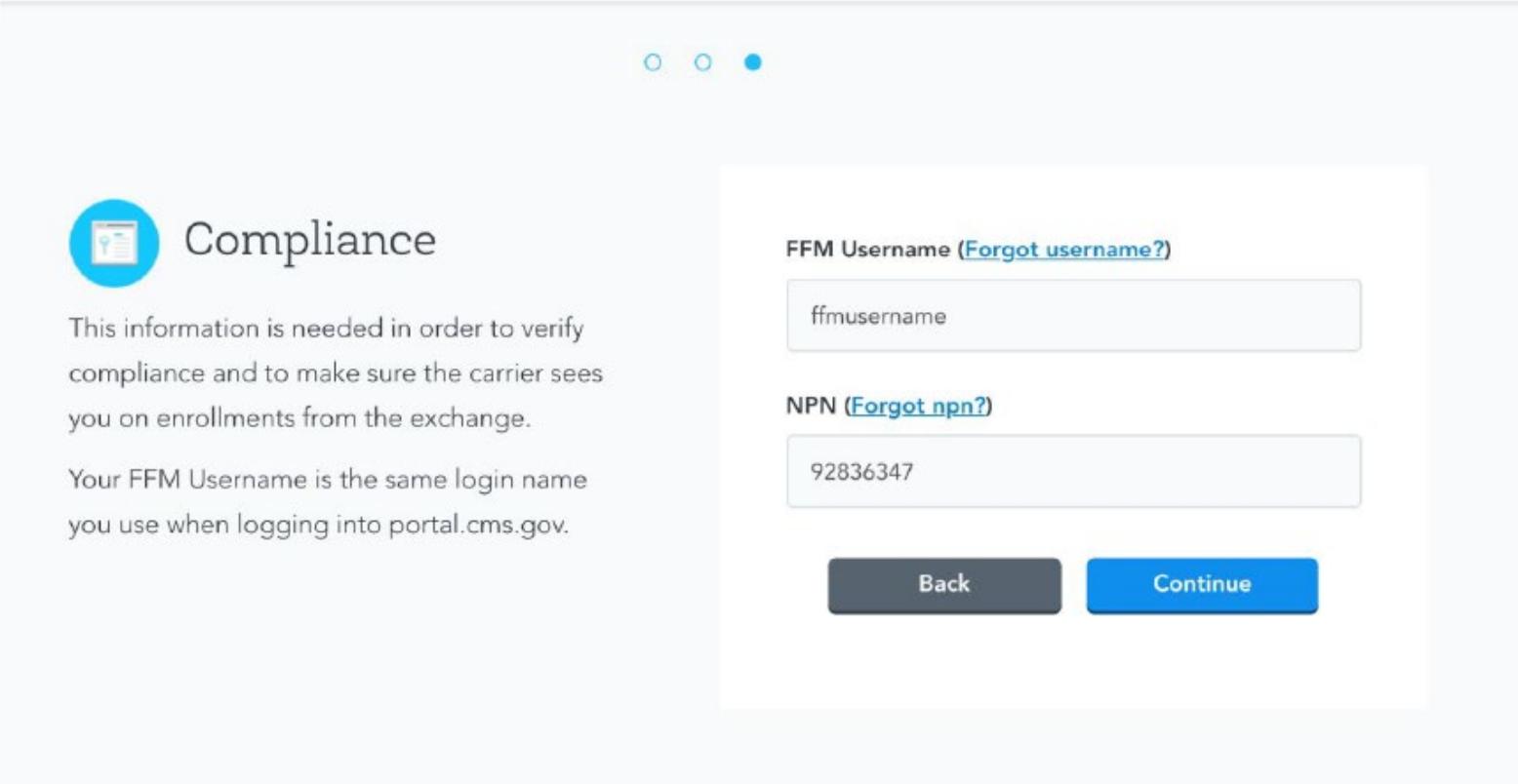
- Any agency you join will be able to **view & export** your Clients and Leads.
- If the agency you join is downline from other agencies, those other agencies will be able to **view and export** your Clients and Leads.

Join Code

Back Continue

Compliance:

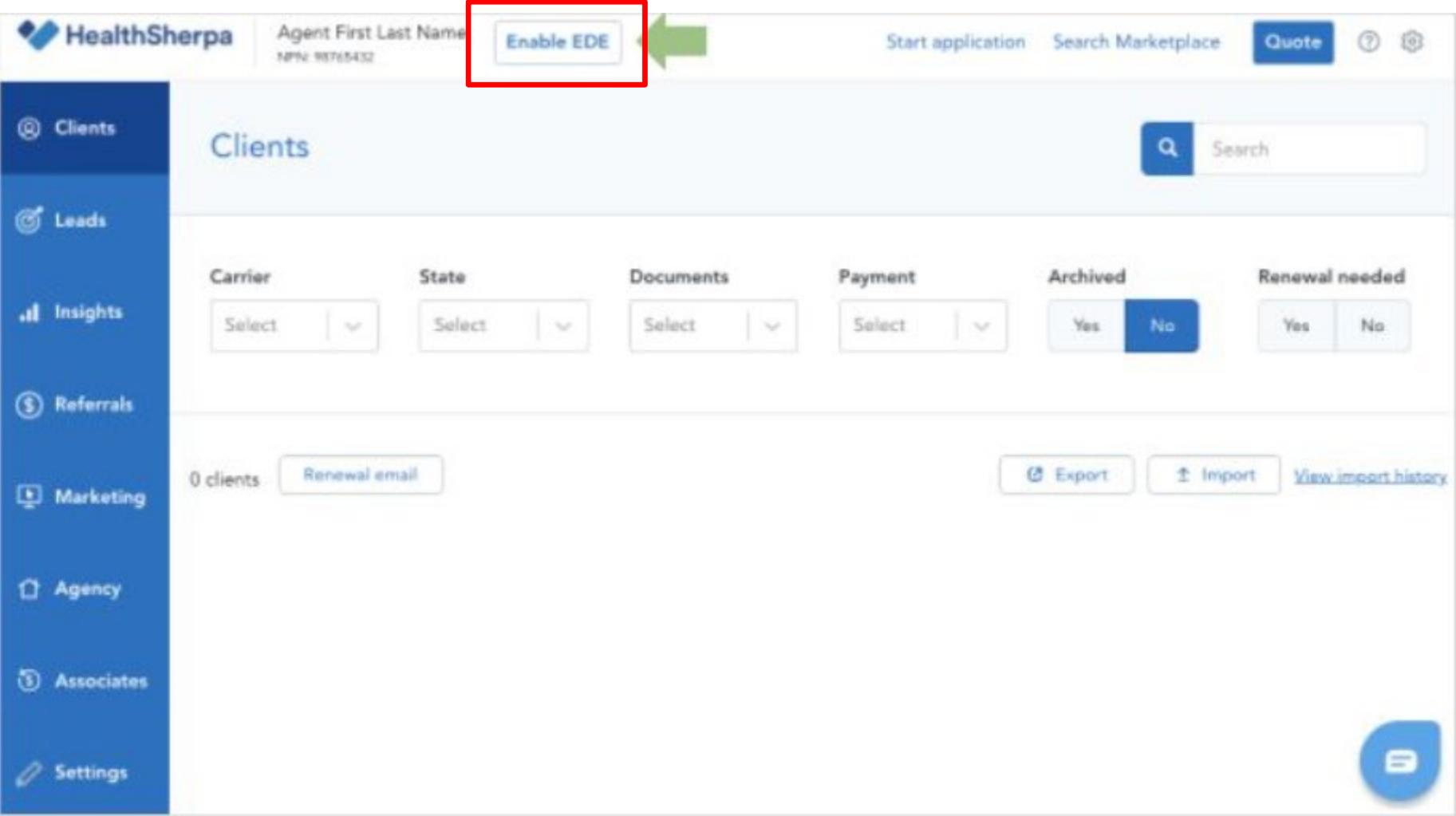
You'll be required to enter your FFM username and NPN, which will be attached to submitted applications by the CMS Marketplace.



The screenshot shows a web interface for entering compliance information. On the left, there is a section titled "Compliance" with a circular icon containing a document and a key. Below the title, there is explanatory text: "This information is needed in order to verify compliance and to make sure the carrier sees you on enrollments from the exchange." and "Your FFM Username is the same login name you use when logging into portal.cms.gov." On the right, there is a form with two input fields. The first field is labeled "FFM Username (Forgot username?)" and contains the text "ffmusername". The second field is labeled "NPN (Forgot npn?)" and contains the number "92836347". Below the input fields are two buttons: a dark grey "Back" button and a blue "Continue" button.

Dashboard:

Upon completion of the Onboarding flow, you will see your Dashboard. To access full EDE functionality, click the “Enable EDE” button in the header and complete the next steps.



Enable EDE:

Enable EDE:

Brokers must enable EDE on their accounts to utilize the EDE pathway, which includes: enrolling directly on the Broker On Exchange Enrollment Solution / HealthSherpa platform (as opposed to being redirected to healthcare.gov); searching and claiming an application from the Marketplace, and servicing a policy.

Enabling EDE consists of three steps:



Personal Data Collection:

Enter your SSN, DOB, and other personal information to verify your identity and NPN.

Verify your identity

CMS requires every agent verify their identity in order to use the Enhanced Direct Enrollment (EDE) pathway. [Learn more](#)

Your contact information

First name: wooter Middle: Last name: yeah Suffix: Select

Date of birth: MM/DD/YYYY Social security number: XXX-XX-XXXX

Contact information

Street address: Apt. / Ste. (Optional):

City: State: Select Zip code: XXXXX

Phone number: (408) 123-1234

ID Proof:

Next, verify your identity by answering questions from Experian. This is also known as Remote ID Proofing Service (RIDP), and is required by CMS.

Verify your identity

Based on the information you just provided, we've pulled together some questions that only you'll be able to answer.

[Learn more](#)

You may have opened an auto loan in or around April 2021. Please select the lender for this account. If you do not have such an auto loan, select 'NONE OF THE ABOVE/DOES NOT APPLY'.

ONYX ACCEPT

TRANSAMERICA

CHASE MANHATTAN BK

JPMCB AUTO

NONE OF THE ABOVE/DOES NOT APPLY

You may have opened a mortgage loan in or around January 2013. Please select the lender to whom you currently make your mortgage payments. If you do not have a mortgage, select 'NONE OF THE ABOVE/DOES NOT APPLY'.

PHH MORTGAGE SERVICES

BANK OF AMERICA

INDEPENDENCE ONE

M AND T MORTGAGE

NONE OF THE ABOVE/DOES NOT APPLY

NIPR NPN Verification:

The platform will also validate the NPN with NIPR. After this is completed, the Dashboard screen will display again.

Please verify your NPN

We need to verify your National Producer Number with the National Insurance Producer Registry (or NIPR). This helps protect you and your clients when using the Marketplace.

Individual Agency

National producer number (NPN) [edit](#)

17169718

First name

wooter

Last name

yeah

Date of birth

MM/DD/YYYY

Social security number

XXX-XX-XXXX

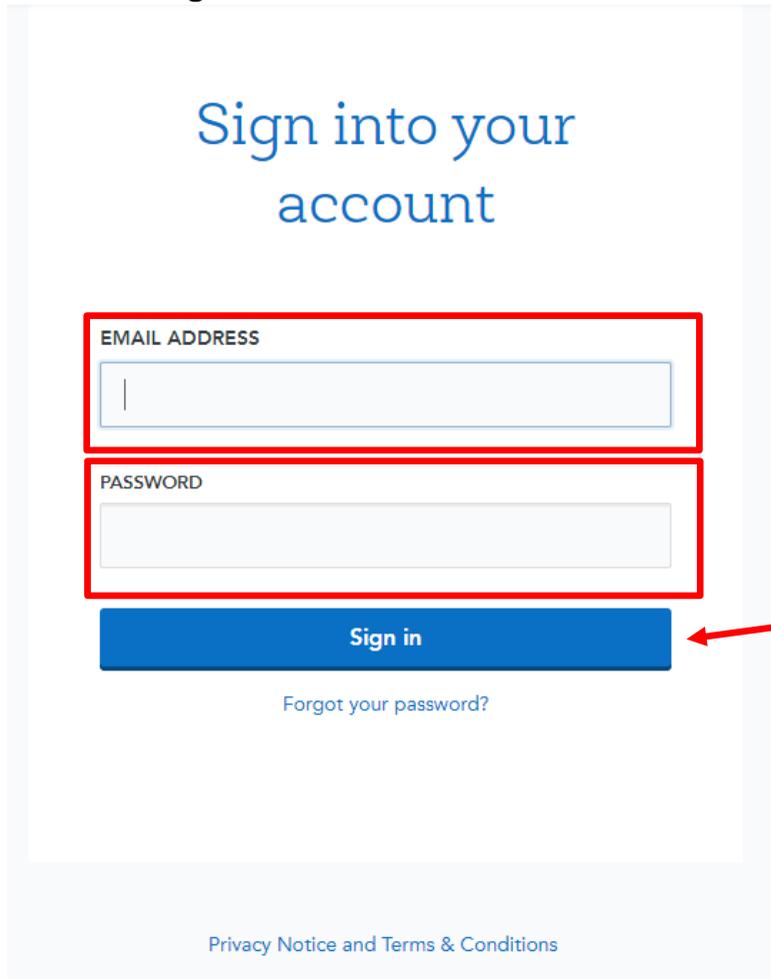
By clicking submit, you agree to allow us to verify the NPN you use with the NIPR.

Submit

Signing In:

Signing In After Account Creation and Onboarding:

Enter Email Address and Password from the Account Creation step.
Click the “Sign in” button.



The screenshot shows a sign-in form with the following elements:

- Header: "Sign into your account" in blue text.
- Input field: "EMAIL ADDRESS" with a text box below it.
- Input field: "PASSWORD" with a text box below it.
- Button: A blue "Sign in" button.
- Link: "Forgot your password?" below the sign-in button.
- Footer: "Privacy Notice and Terms & Conditions" at the bottom.

Red annotations highlight the "EMAIL ADDRESS" and "PASSWORD" input fields, and a red arrow points to the "Sign in" button.

- Your Dashboard will be displayed, and you are ready to quote, enroll and service clients!

