



Health Plans



Health First Health Plans Broker Portal supported by Oscar Overview

Broker Training
2021

Training Topics

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03 — New Broker - Setting up an Account

04 — Broker Homepage

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- Start Selling
- Agency Details
- Locating Your BoB
- Menu Items

05 — Contact Us

Welcome to your Broker Portal

As a broker, your time is valuable, so we would like to make it easy for you to access the tools you need in one location.

In the Broker Portal you will be able to:

- Get appointed
- Update your account
- Quote & enroll clients
- Review & manage your BoB
- View commissions

If you have questions, please reach out to the Oscar Broker Support team at hf-brokers@plusoscar.com,

or Health First Broker Services at 321.434.5265 or HFBroker@HF.org



How to Log-In

Broker Portal Location

The Broker Portal can be accessed in two ways:

From the public website at:
myHFHP.org or myAHPlan.com

1



Directly via <https://healthfirst-brokers.hioscar.com/login>

2



Existing Broker Log-In

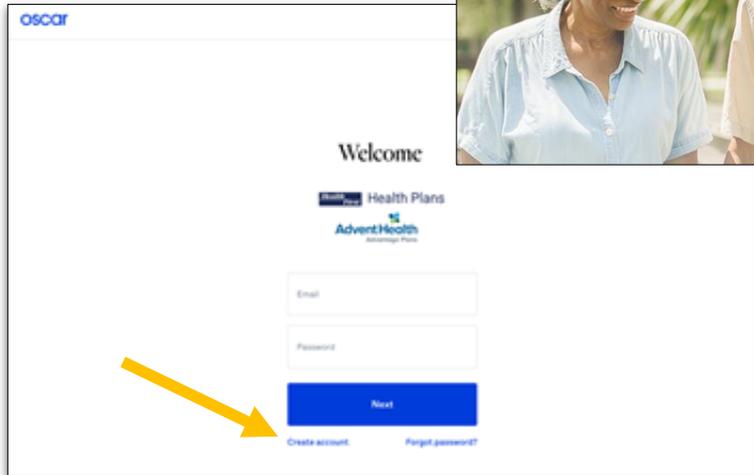
Existing Brokers: Accessing your Broker Portal Account

If you're an existing Health First broker, GOOD NEWS - your account has already been set up.

From the public website, locate the Broker Portal login page:

- 1. myHFHP.org or myAHPlan.com
- 2. Click "Login"
- 3. Click "Broker"
- 4. Select "Create Account"

Note: Google Chrome is recommended



Existing Brokers: Logging into your Broker Portal Account

Choose an account type to create

Let's start by selecting an option that best describes you.

Broker
I am a licensed health insurance broker. I plan to quote and sell HFHP & AHAP products.

General agent
I will enroll or manage business on a broker's behalf.



Select "Broker" to begin selling.

General Agent's/FMO's will select the General Agent Option.

Existing Brokers: Logging into your Broker Portal Account

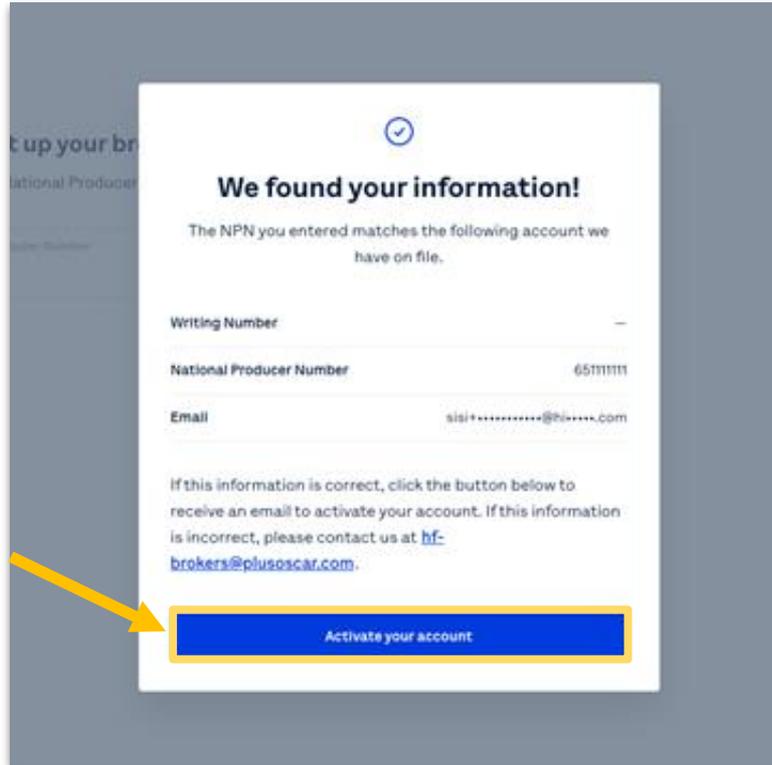
Let's set up your broker account

Enter your National Produce Number. You can look up your NPN at [NIPR](#).

[Back](#) [Next](#)

Enter your National Producer Number (NPN)

Existing Brokers: Logging into your Broker Portal Account



The portal will detect a NPN match, and show the following modal

Click “Activate your account”

Check your email for an Account Initialization email, and move through the authentication process as outlined in the email.

Note: Check your Spam folder as the email may not have routed directly to your inbox.

Existing Brokers: Logging into your Broker Portal Account

Lastly, set up your account

Finish setting up your account with your name and primary business email.

First name	Last name
Email	Confirm email
Password 	Confirm password

[Back](#) [Sign up!](#)

You will be directed back to your account to finalize setting up the account, and creating a password

Note:
Existing Brokers will have profiles created already with demographic and direct deposit information.

**Review all information for accuracy.
Update if information is missing or not accurate.**

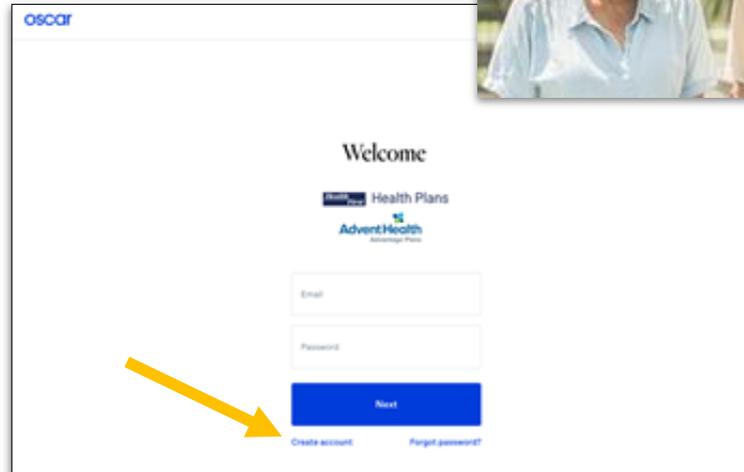
New Broker Account Creation

New Brokers: Creating your Broker Portal Account

From the public website, locate the Broker Portal login page:

1. myHFHP.org or myAHPlan.com
2. Login
3. Broker
4. Select “Create Account”

Note: Google Chrome is recommended



New Brokers: Creating your Broker Portal Account

Choose an account type to create

Let's start by selecting an option that best describes you.

Broker
I am a licensed health insurance broker. I plan to quote and sell HFHP & AHAP products.

General agent
I will enroll or manage business on a broker's behalf.



Select "Broker" to begin selling Health First Health Plans and AdventHealth Advantage Plan Products.

General Agent's/FMO's will select the General Agent Option.

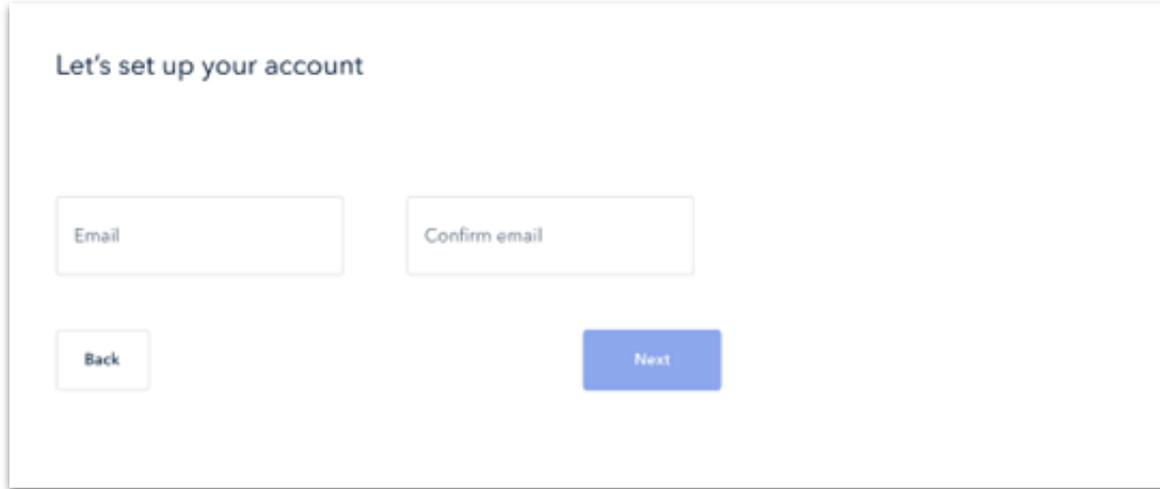
New Brokers: Creating your Broker Portal Account

Let's set up your broker account

Enter your National Produce Number. You can look up your NPN at [NIPR](#).

Enter your National Producer Number (NPN)

New Brokers: Creating your Broker Portal Account



The screenshot shows a web form titled "Let's set up your account". It contains two input fields: "Email" and "Confirm email". Below the "Email" field is a "Back" button, and below the "Confirm email" field is a blue "Next" button.

Enter and confirm your Email address

Note: To request to have your email address changed, you will need to send an email to: hf-brokers@plusoscar.com

New Brokers: Creating your Broker Portal Account

Are you the principal of an agency?

As an agency principal, you are responsible for managing your organization's account, as well as inviting, approving, and terminating users as necessary.

No, I am not the principal of an agency

Yes, I am the principal of an agency

[Back](#) [Next](#)

Confirm “Yes” or “No” if you are the principal of your agency

New Brokers: Creating your Broker Portal Account

Do you work for an agency or brokerage?

Working for an agency/brokerage means that you will be assigning your commissions to that agency/brokerage.

- No, I do not work for agency. I am an independent broker
- Yes, I work for an agency but I am NOT the principal agent
- Yes, I work for an agency and I am the principal agent

Back

Next

Confirm your Agency status

New Brokers: Creating your Broker Portal Account

Lastly, set up your account

Email
Sampleemail@gmail.com

Confirm email
Sampleemail@gmail.com

Password
|

- At least 6 characters
- 1 uppercase character
- 1 number

Confirm password

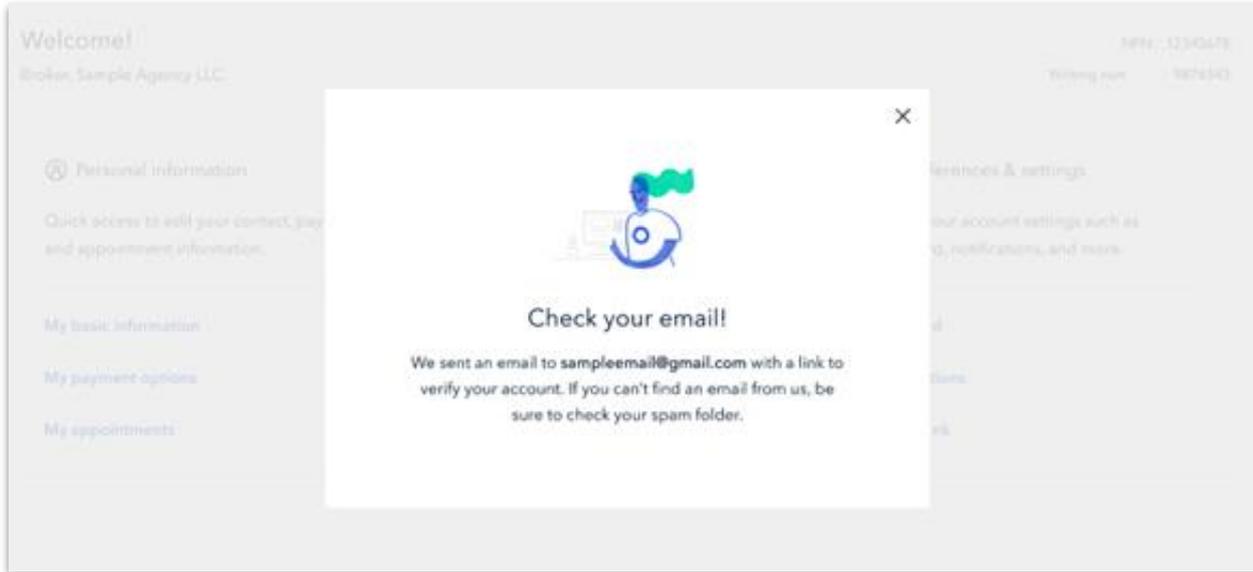
Sign up!

Set up your broker account with Email & Password

Your password must include:

- At least 6 characters
- 1 uppercase character
- 1 number

New Brokers: Creating your Broker Portal Account

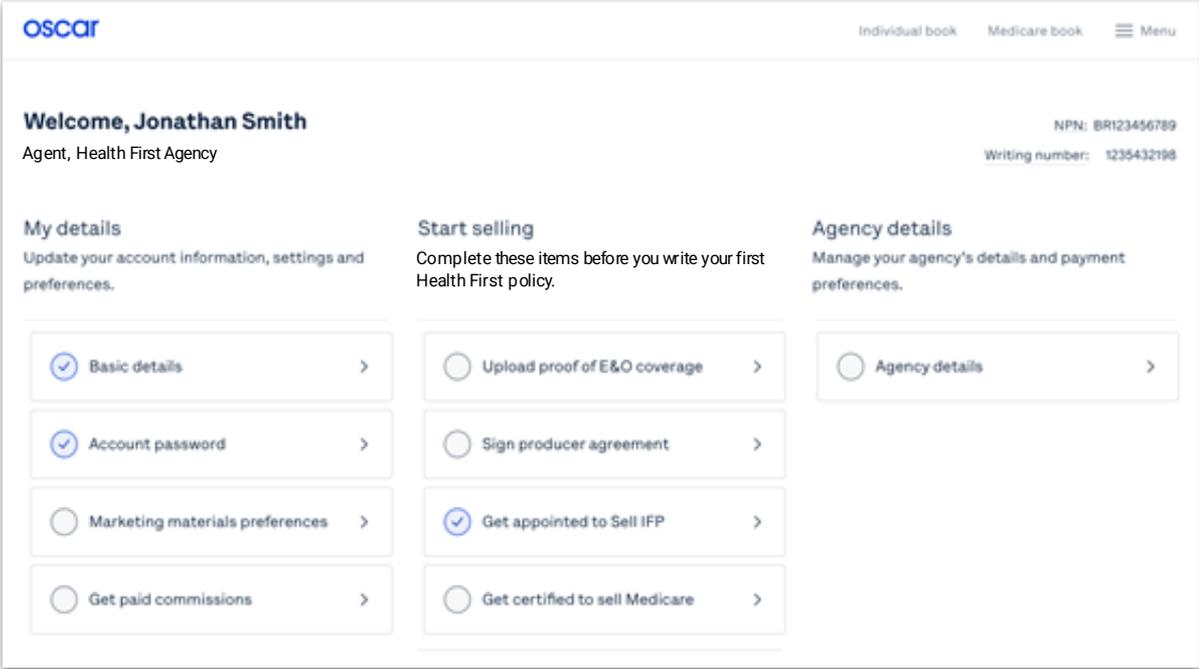


Verify your account via your email used to create your account.

Note: Check your Spam folder as the email may not have routed directly to your inbox.

Broker Homepage

Broker Account:



Oscar’s logo will be displayed in the Health First Health Plans Broker Portal supported by Oscar as we are using their technology platform.

The information and plans presented in this portal will be from Health First Health Plans and AdventHealth Advantage Plans.



Your Broker Account Homepage will allow you to **view and update** personal details, ready to sell documents, and agency details.



Broker Account: My details

oscar Individual book Medicare book Menu

Welcome, Jonathan Smith
Agent, Health First Agency NPN: BR123456789
Writing number: 1235432198

My details
Update your account information, settings and preferences.

- Basic details >
- Account password >
- Marketing materials preferences >
- Get paid commissions >

Start selling
Complete these items before you write your first Health First policy.

- Upload proof of E&O coverage >
- Sign producer agreement >
- Get appointed to Sell IFP >
- Get certified to sell Medicare >

Agency details
Manage your agency's details and payment preferences.

- Agency details >

The **My details** section will allow you to:

1. Update your personal details
2. Reset your password
3. Set marketing material preferences
4. Enter payment information

Broker Account: My details

My details
Update your account information, settings and preferences.

- Basic details** >
- Account password** >
- Marketing materials preferences** >
- Get paid commissions** >

[← Back to My account](#)

Basic details

Manage your basic information — your name, contact, and mailing address — to help us stay in touch with you.

Unique identifiers (admin only)

NPI

Name

First name

Last name

Contact details

Email address

Administrative email

Optional

Phone number Ext.

Optional Optional

Mailing address

Address line 1

Address line 2

Optional

City

State Zip

Save changes

Update your Name, Contact Details & Mailing Address in **Basic Details**

Broker Account: My details

My details
Update your account information, settings and preferences.

- Basic details >
- Account password** >
- Marketing materials preferences >
- Get paid commissions >

Reset password [X]

Enter your current password and select a new password for future logins.

Current password [input field]

New password [input field]

Confirm password [input field]

Cancel Submit

Clicking **Account password** will force a pop-up that allows you to reset your current password

Broker Account: My details

My details
Update your account information, settings and preferences.

- Basic details >
- Account password >
- Marketing materials preferences >
- Get paid commissions >

What line(s) of business would you like more information on?

We'll send you emails and marketing materials relevant to your selected preferred lines of business.

Select all that apply

- Individual
- Medicare Advantage

Marketing materials preferences will allow you to select which emails and marketing materials you would like to receive from Health First Health Plans based on preferred lines of business

Broker Account: My details

My details
Update your account information, settings and preferences.

- Basic details >
- Account password >
- Marketing materials preferences >
- Get paid commissions** >



Payment requirements

In order to pay you commissions, we require your tax ID number and a completed W-9. We are not permitted to release your commissions until we have this information on file. If you are writing under an agency, you will be paid under that agency even if you enter payment information.

- Social security number ... - .. - 1234 [Edit](#)
- W-9 upload 2 documents uploaded [Edit](#)
- Preferred payment method ACH (via online deposit) [Edit](#)

Get paid commissions will prompt you to enter your social security number, **upload your W-9**, and include your preferred payment method.

Health First brokers will have a Direct Deposit (ACH) payment method option available.

*Note: if you receive commissions through an Agency, you do **not** need to complete this section.*

Broker Account: Start selling

The screenshot shows the Oscar broker account dashboard for Jonathan Smith, Agent at Health First Agency. The dashboard is divided into three main sections: 'My details', 'Start selling', and 'Agency details'. The 'Start selling' section is highlighted with a yellow border and contains four items, each with a radio button and a right-pointing arrow. The 'Get appointed to Sell IFP' item is checked with a blue checkmark. The 'Agency details' section contains one item, 'Agency details', which is not checked. The 'My details' section contains four items, all of which are checked with blue checkmarks.

My details
Update your account information, settings and preferences.

- Basic details >
- Account password >
- Marketing materials preferences >
- Get paid commissions >

Start selling
Complete these items before you write your first Health First policy.

- Upload proof of E&O coverage >
- Sign producer agreement >
- Get appointed to Sell IFP >
- Get certified to sell Medicare >

Agency details
Manage your agency's details and payment preferences.

- Agency details >

The **Start selling** section requires you to:

1. **Upload proof of E&O coverage**
2. **Sign the producer agreement**
3. **Get appointed to sell Individual and Family Plans (IFP)**
4. **Get appointed and certified to sell Medicare Advantage (MA)**

Broker Account: Start selling

Start selling
Complete these items before you write your first Health First policy.

- Upload proof of E&O coverage >
- Sign producer agreement >
- Get appointed to Sell IFP >
- Get certified to sell Medicare >

My account > E&O coverage

Submit proof of errors & omissions coverage

All agents must have errors & omissions in the amount of \$1 million per incident and \$1 million in aggregate. Oscar reserves the right to audit this documentation throughout the year and terminate appointment if the coverage is not valid.

Upload document

Upload proof of E&O coverage will ask you to upload your E&O document, select who the policy covers, and enter the dates for which the policy is valid for.

To edit or remove the current E&O document, you will need to email: hf-brokers@plusoscar.com

Broker Account: Start selling

Start selling

Complete these items before you write your first Health First policy.

Upload proof of E&O coverage >

Sign producer agreement >

Get appointed to Sell IFP >

Get certified to sell Medicare >



My account > Producer agreement

E-sign producer agreement

As the last step of your appointment request, please read and review our producer agreement. When you are ready to finalize your request, confirm your signature and submit below.

1 / 15

HEALTH FIRST ADMINISTRATIVE PLANS
AGENT AND AGENCY AGREEMENT

THIS AGENT AND/OR AGENCY AGREEMENT ("Agreement") is made between Health First Administrative Plans, Inc., a Florida corporation with its principal office at _____, ("Company") and _____, ("Agent and/or Agency").

WHEREAS, Health First Administrative Plans, Inc. administers Health First Health Plans, Health First Commercial Plans and Health First Insurance, which are licensed to operate as Health First Health Insurance by the State of Florida.

WHEREAS, Agent/Agency affirms that Agent/Agency is licensed in good standing with the State of Florida as a health insurance agent, and

WHEREAS, Company desires that Agent/Agency be authorized to sell Company Products on the terms and conditions provided for in this Agreement, and

WHEREAS, Agent/Agency desires to market Company Products to eligible beneficiaries ("Contractors").

NOW, THEREFORE, in consideration of the mutual promises and covenants made in this Agreement, and for other good and lawful considerations, the Parties hereto agree as follows:

Confirm your first and last name to e-sign this document.

First Name Last Name

I have reviewed, understood, and agree to comply with the attached agreement.

Sign producer agreement will prompt you to review, and digitally sign the Health First Agent and Agency Agreement and Commission Schedule.

Note: This agreement must be signed based on the exact spelling of your name from your insurance license.

Broker Account: Start selling

Start selling
Complete these items before you write your first Health First policy.

- Upload proof of E&O coverage >
- Sign producer agreement >
- Get appointed to Sell IFP** >
- Get certified to sell Medicare >

My account > Appointments

Health First Appointments

You must be appointed per state to receive commissions for the policies you enroll in each state.

HFHP & AHAP plans are available in FL. Appointment requests get processed within 5-7 business days.

[Request Appointment](#)

State	Broker license number	Agency	Agency license number	Status
FL	XXXX	--	--	Complete

To **get appointed to sell Individual and Family Plans**, you will be able to request your FL appointment and have it processed within 5-7 business days.

Additional details to be shared in the **How to Get Appointed** supplementary training.

Broker Account: Get Certified to Sell Medicare

Start selling
Complete these items before you write your first Health First policy.

- Upload proof of E&O coverage >
- Sign producer agreement >
- Get appointed to Sell IFP >
- Get certified to sell Medicare >

If you have already completed your Health First Required Medicare Certification (HFMC) and provided your AHIP Certification to Health First by August 20, your information has been transferred to Oscar. You will see this information in your Oscar Broker Portal by September 5.

If you did not complete your HFMC or AHIP certifications by August 20, you will be required to complete all requirements through the Broker Portal, shown here under *Get certified to sell Medicare*.

Broker Account: Start selling

Start selling

Complete these items before you write your first Health First policy.

Upload proof of E&O coverage >

Sign producer agreement >

Get appointed to Sell IFP >

Get certified to sell Medicare >

Medicarebook > Certifications

Certifications

You can get certified to sell 2022 Health First Medicare Advantage plans below. **Please note: 2021 Health First Medicare Advantage certifications are now closed.**

Certification	Steps Completed	Status
2022 Medicare Advantage Certification	0/6 steps	Incomplete >
2021 Medicare Advantage Certification	0/6 steps	Incomplete >
2020 Medicare Advantage Certification	0/6 steps	Incomplete >

To **get certified to sell Medicare**, you will be able to begin the certification process to sell 2022 Medicare Advantage plans. Appointment and certification will take place for MA in this step.

Additional details to be shared in the **How to Get Appointed** supplementary training.

Broker Account: Agency details

The screenshot shows the Oscar Broker Account dashboard for Jonathan Smith, Agent at Health First Agency. The dashboard is divided into three main sections: 'My details', 'Start selling', and 'Agency details'. The 'Agency details' section is highlighted with a yellow border. It contains a single item: 'Agency details' with a radio button and a right-pointing arrow. The 'My details' section includes 'Basic details', 'Account password', 'Marketing materials preferences', and 'Get paid commissions'. The 'Start selling' section includes 'Upload proof of E&O coverage', 'Sign producer agreement', 'Get appointed to Sell IFP', and 'Get certified to sell Medicare'. The top right of the dashboard shows 'Individual book', 'Medicare book', and a 'Menu' icon. The user's NPN is BR123456789 and the Writing number is 1235432198.

oscar Individual book Medicare book Menu

Welcome, Jonathan Smith
Agent, Health First Agency

NPN: BR123456789
Writing number: 1235432198

My details
Update your account information, settings and preferences.

- Basic details >
- Account password >
- Marketing materials preferences >
- Get paid commissions >

Start selling
Complete these items before you write your first Health First policy.

- Upload proof of E&O coverage >
- Sign producer agreement >
- Get appointed to Sell IFP >
- Get certified to sell Medicare >

Agency details
Manage your agency's details and payment preferences.

- Agency details >

The **Agency details** section allows you to:

1. Update agency details
2. Enter agency payment information

Broker Account: Agency details

Agency details
Manage your agency's details and payment preferences.

 Agency details >



My account > Agency details

Agency details

Manage your agency's basic information — your name, contact, and mailing address — to help us stay in touch with you.

Name & ID

Agency Name
1

NPI
1

If NPI is not correct please contact brokers@hisacat.com to get it changed immediately.

Principal agent

You are this agency's principal agent.
To remove yourself as principal agent, please contact brokers@hisacat.com.

Contact details

Email address

Administrative email (optional)

Phone number (optional) Ext (optional)

Payment requirements

In order to pay you commissions, we require your tax ID number and a completed W-9. We are not permitted to release your commissions until we have this information on file. If you are writing under an agency, you will be paid under that agency even if you enter payment information.

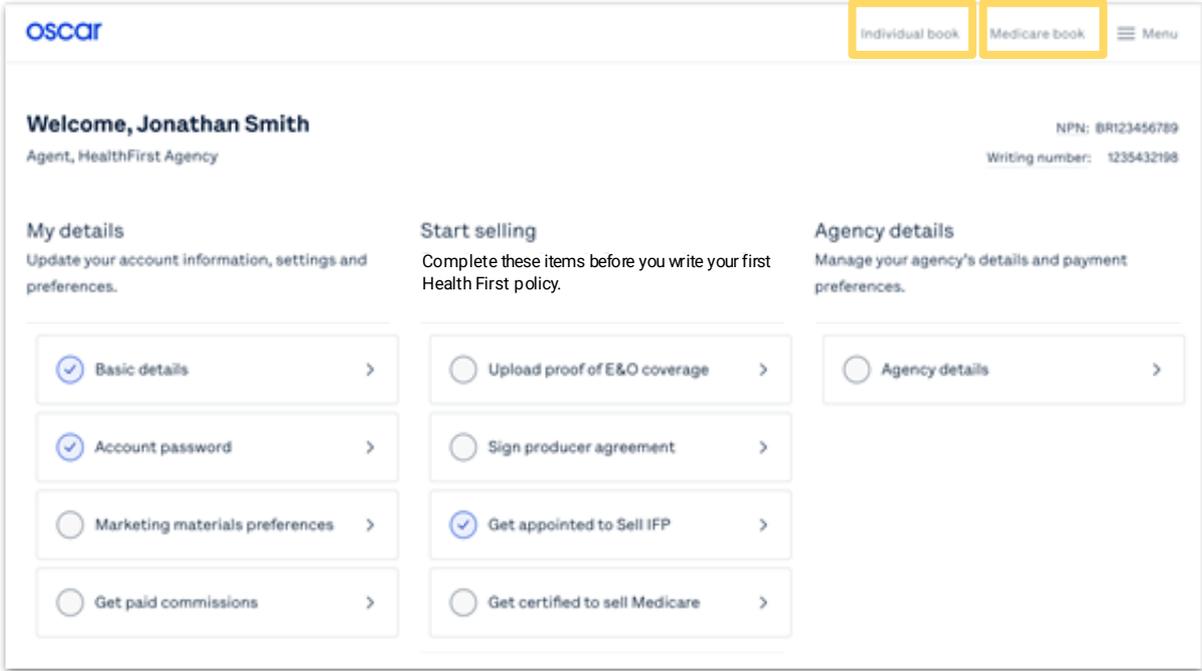
Employer Identification Number (EIN) ** - ***2341 [Edit](#)

W-9 upload 1 document uploaded [Edit](#)

Preferred payment method ACH (via online deposit) [Edit](#)
Account number **** 4234

Agency details will allow you to update and manage your agency's basic information *if you are the principal broker*

Broker Account: Locating your BoB



To view your Book of Business, select either **Individual book** or **Medicare book** via the top navigation bar of the broker portal

Broker Account: Managing your BoB

oscar

Individual book Medicare book Menu

5

Agency Personal

Individual book of business

This table displays all of your active individual policies. To view additional details for each policy, export your full book of business. Please note that policies submitted on-exchange will take up to two days to process before appearing here. Upon export, you will also be able to view your renewing book of business including plans and premiums. On-exchange renewals will populate in the exported file as they are sent to us by the exchanges.

1

Enroll new policy

2

Search by member name or member ID



All statuses

4

Export CSV

6 policy record(s)

Policy holder ↑	Plan name	Coverage	Premium	Policy status	
3 Antonio Ruiz OSC79569402-01	AdventHealth Bronze HMO 100 1776 (2 members)	January 1, 2022 December 31, 2022	\$890.61	Paid binder >	Make a payment
Ashley Osborn OSC79569378-01	Health First GYM ACCESS Silver HMO 100 1664 (2 members)	January 1, 2022 December 31, 2022	\$1,302.39	Paid binder >	Make a payment
Barbara Banks OSC79569402-01	Health First GYM ACCESS Silver HMO 80 1600	January 1, 2022 December 31, 2022	\$2,574.25	Unpaid binder >	Make a payment

1. Quote & enroll clients in minutes
2. Search by name, or filter by status to find clients
3. Click on any client to view more details including plan information, dependents, contact information, billing & payment history
4. Export your BoB to see more details
5. For agency principals: View and manage any policies attributed to your agency



These functionalities will also be available for Medicare Advantage BoB



Broker Account: Menu Items

oscar Individual book Medicare book **Menu**

Welcome, Jonathan Smith
Agent, Health First Agency

NPN: BR123456789
Writing number: 1235432198

My details	Start selling	Agency details
Update your account information, settings and preferences.	Complete these items before you write your first Health First policy.	Manage your agency's details and payment preferences.
<input checked="" type="checkbox"/> Basic details >	<input type="checkbox"/> Upload proof of E&O coverage >	<input checked="" type="checkbox"/> Agency details >
<input checked="" type="checkbox"/> Account password >	<input type="checkbox"/> Sign producer agreement >	<input type="checkbox"/> Agency payment setup >
<input type="checkbox"/> Marketing materials preferences >	<input type="checkbox"/> Get appointed & certified >	
	<input type="checkbox"/> Get paid commissions >	



Jessica Bling ×
Broker

- [Appointments](#)
- [Commissions](#)
- [My account](#)
- [Logout](#)

Need help? Contact us:
hf-brokers@plusoscar.com
1 (877) 693-6489



Oscar's Broker Support Team is here to help

- ✓ **Broker account** support
- ✓ **Appointment & certification** support
- ✓ Commissions **escalations**
- ✓ **Eligibility** inquiries
- ✓ **Member** inquiries & support
- ✓ **Network/Rx** support

Monday through Friday 8:00am - 6:00pm EST



hf-brokers@plusoscar.com

hf-brokercommissions@plusoscar.com

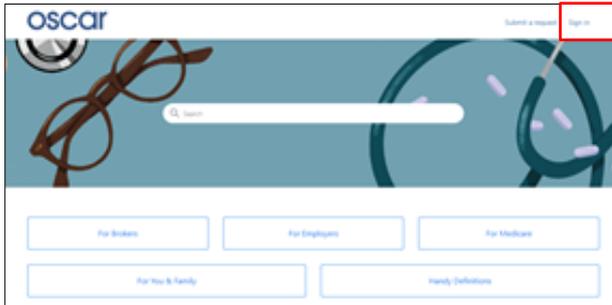
877-693-6489



Creating Your Zendesk Account

In order for brokers to communicate with Oscar through the designated emails provided, you will need to create an account through Zendesk. Follow the below steps.

- Start at Oscar's [Zendesk Help Center](#)
- Click "Sign in" from the top right



Sign in to Oscar Health

Email

Password

Sign in

[I am an Agent](#)

[Forgot my password](#)

New to Oscar Health? [Sign up](#)

Have you emailed us? [Get a password](#)

If you've communicated with our support staff through email previously, you're already registered. You probably don't have a password yet, though.

- A pop-up window will prompt you to sign in. If you don't have an account, select "Sign up" next to "New to Oscar Health?"
- Submit your full name and email address
- Click the blue "Sign up" button. Look for an email to complete account set-up.
- From your inbox, look for "Welcome to Oscar Health." Click the link to complete creating your password.
- You can now successfully communicate to/from, via email, with Oscar.

Health First Health Plans Broker Services is available:
Monday through Friday 8:00 a.m. to 5:00 p.m.

For questions contact us at:
321.434.5265 or HFBroker@HF.org