CENTERS FOR MEDICARE & MEDICAID SERVICES

Guidance on Plan Year 2016 Federally-facilitated Marketplace Registration and Training

An Overview for Agents and Brokers

- *September 9, 2015*
- *September 10, 2015*
- *September 11, 2015*
- *September 15, 2015*
- *September 17, 2015*
- *September 18, 2015*
- *September 25, 2015*

Webinar Agenda

- Webinar Objectives
- FFM Plan Year 2016 Agent and Broker Registration and Training Overview and Process Walkthrough
- Resources
- Question & Answer (Q&A) Session
- Closing Remarks

The information provided in this presentation is intended only to be a general informal summary of technical legal standards. It is not intended to take the place of the statutes, regulations, and formal policy guidance that it is based upon. This presentation summarizes current policy and operations as of the date it was presented. Links to certain source documents have been provided for your reference. We encourage audience members to refer to the applicable statutes, regulations, and other interpretive materials for complete and current information about the requirements that apply to them.

Webinar Objectives

Topics to be covered:

- Small Business Health Options Program (SHOP) Marketplace Overview
- FFM Agent and Broker Registration and Training Overview
- CMS-approved Vendor FFM Agent and Broker Training Option Overview
- FFM Agent and Broker Registration and Training Process Steps

Please note that the content in this presentation is limited to the Federally-facilitated Individual and SHOP Marketplaces.

Guidance on Plan Year 2016 Federally-facilitated Marketplace Registration and Training

SHOP Marketplace Overview

SHOP Marketplace Registration

To register to participate in the SHOP Marketplace, agents and brokers:

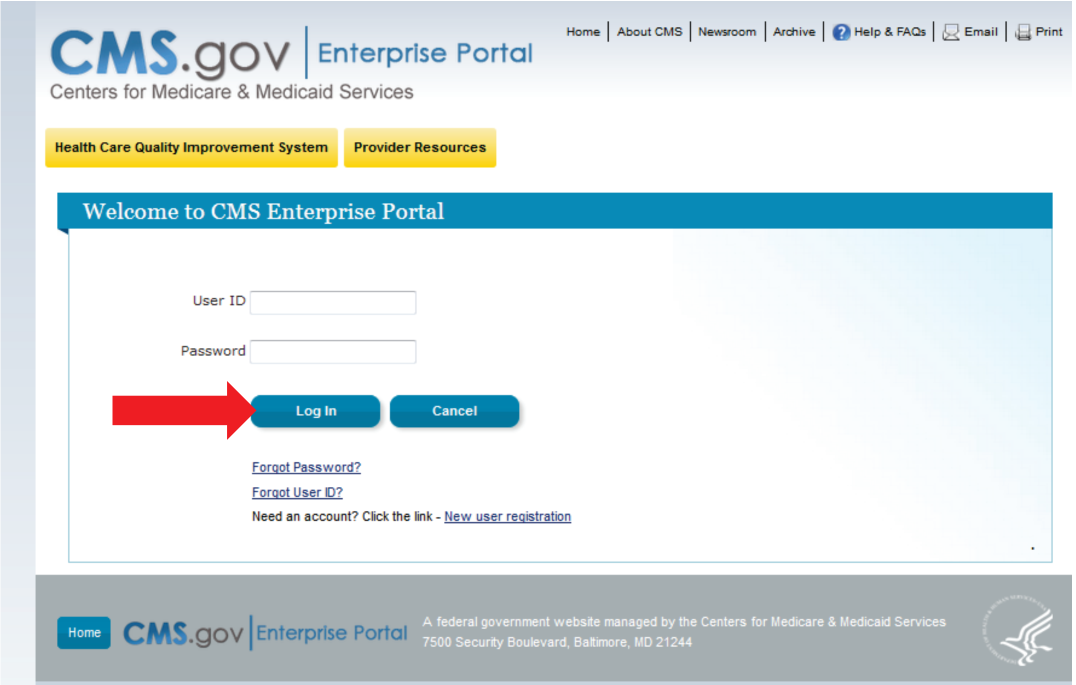
- Must create an account and complete identity proofing on the CMS Enterprise Portal
- Must execute the SHOP Privacy & Security Agreement in the Marketplace Learning Management System (MLMS)
- Must complete their searchable profile on the SHOP Marketplace Agent/Broker Portal
- May complete the SHOP Marketplace training and exam. It is highly recommended that agents and brokers complete SHOP Marketplace training, but not required.

To access the SHOP Marketplace Agent/Broker Portal to complete searchable profile and manage SHOP accounts visit:
https://healthcare.gov/marketplace/small-businesses/agent

SHOP Marketplace Agent/Broker Portal

- To create a searchable profile on the SHOP Marketplace Agent /Broker Portal, first visit https://healthcare.gov/marketplace/small-businesses/agent and enter your Marketplace User ID and password.

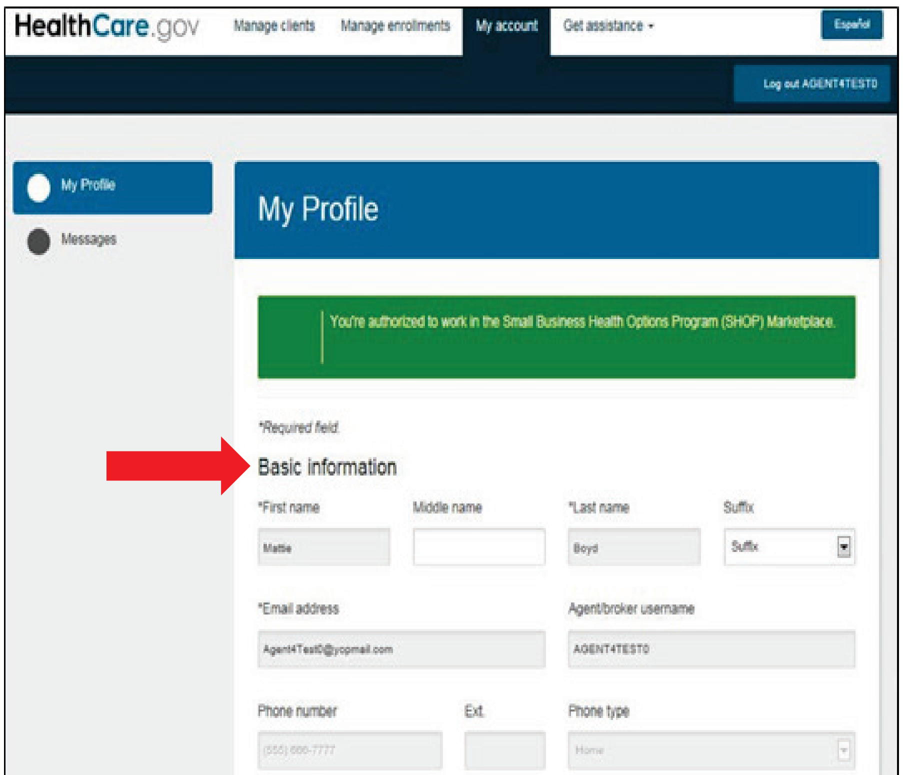
- Then select "Log In."

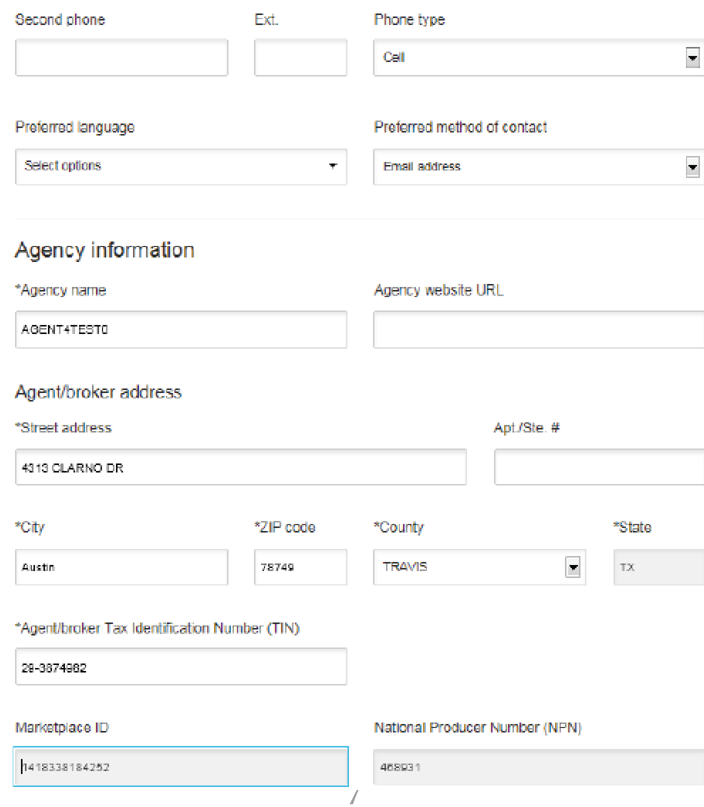


Note: The SHOP Marketplace Agent/Broker Portal is only available to those agents and brokers who have completed the FFM registration process

SHOP Marketplace Agent/Broker Portal

- Once on the My Profile page, enter basic information about you and your agency.
- The information you provide will be visible to employers in your area seeking assistance in the SHOP Marketplace. Once complete, click “Save and Continue.”





Working With Clients in the SHOP Marketplace

- Employers must authorize a SHOP registered agent or broker to work on their behalf in the SHOP Marketplace. To authorize a SHOP registered agent or broker, the employers must:
  - Create an account and verify their identity on HealthCare.gov
  - Search for an agent or broker by name, National producer Number (NPN), or location and click "Authorize"
  - Once an employer sends an authorization to an agent or broker, the agent or broker can log into his or her SHOP Marketplace Agent/Broker Portal account and accept the authorization
- Once authorized, SHOP registered agents and brokers may complete the entire application on behalf of their clients
- Through the SHOP Marketplace Agent/Broker Portal, SHOP registered agents and brokers can:
  - Assist employers with their applications and enrollments
  - View clients' premium payments and enrollment statuses
  - Manage clients' accounts, including adding/removing employees and dependents from coverage

SHOP Marketplace Tools

There are several tools SHOP registered agents and brokers can use to better assist their clients in the SHOP Marketplace:

- **Premium Estimation Tool**: Help clients browse SHOP Marketplace health and dental plans available in their areas before they enroll. Premium estimates are based on age and geographic location.
- **SHOP Full-time Equivalent (FTE) Employee Calculator**: Help clients determine if they may be eligible for SHOP Marketplace coverage by counting their total number of full-time and FTE employees
- **Small Business Health Care Tax Credit Estimator**: Help employers estimate if they may be eligible for the Small Business Health Care Tax Credit, generally available exclusively for coverage purchased through a SHOP Marketplace, and estimate how much the tax credit may be worth to them

What's New in the SHOP Marketplace for 2016

- **Employee Choice:** Employers in all states will be able to offer their employees a choice of health and dental plans through a SHOP Marketplace.
- **Dental-only Option:** Employers will be able to offer dental coverage, without also offering health coverage through the SHOP Marketplace.
- **Minimum Participation Rate (MPR) Change:** Employers will still need to meet the SHOP MPR requirement (except during the November 15 – December 15 window) to be able to enroll through the SHOP Marketplace, *but* employees with various types of non-SHOP coverage will now be counted toward an employer's participation rate.
- **Online Renewal:** Renewal of employer participation in the SHOP Marketplace will take place online, without having to fill out a new application through HealthCare.gov.

What's New in the SHOP Marketplace for 2016

- **SHOP Marketplace Tools:** The SHOP Marketplace will offer new tools to assist agents, brokers, and their clients for 2016:
  - **Minimum Participation Rate (MPR) Calculator:** Help employers predict if they will meet the MPR required to enroll in the SHOP Marketplace. This calculator will be based on the new MPR methodology for 2016.
  - **Employee Premium Cost Estimator:** Help employers determine how their contribution toward premium costs will impact the amount paid by employees for SHOP Marketplace coverage.

Guidance on Plan Year 2016 Federally-facilitated Marketplace Registration and Training

Registration and Training Overview

Registration and Training Overview

- Registration for plan year 2016* will be available through the CMS Enterprise Portal.
- Agents and brokers who wish to participate in the FFM must complete the following actions on the CMS Enterprise Portal (https://portal.cms.gov/):
  - Create an account
  - Request the FFM agent/broker role
  - Complete remote identity proofing through the Enterprise Identity Management (EIDM) System

** 45 C.F.R. § 155.20 defines "plan year" as a consecutive 12-month period during which a health plan provides coverage for health benefits. A plan year may be a calendar year or otherwise.*

Registration and Training Overview

Agents and brokers must also complete the following actions:

- Complete an agent/broker profile on the new MLMS
- Enroll in the desired Marketplace training (i.e. Individual and/or SHOP) on the MLMS or through a CMS-approved vendor via the CMS Enterprise Portal
- Complete assigned training courses and pass exams through the MLMS or through a CMS-approved vendor via the CMS Enterprise Portal
- Read and accept the applicable Marketplace Agreement(s) on the MLMS

The new MLMS replaces the previously used Medicare Learning Network® (MLN) and can be accessed via the Registration Status page on the CMS Enterprise Portal.

Registration and Training Overview

Enhancements for FFM Agent and Broker Registration for Plan Year 2016

While most of the registration process is the same as in plan year 2015, there are a few new features for plan year 2016:

Plan Year 2016	Plan Year 2015
Only one account (i.e., User ID and password), the CMS Enterprise Portal account, is required.	Two accounts, a CMS Enterprise Portal account and an MLN account, were required.
A registration status page is available on the CMS Enterprise Portal to enable agents and brokers to check their completion statuses in real time.	Agents and brokers could only view their registration status via the Agent and Broker FFM Completion List on the Agents and Brokers Resources webpage at http://www.cms.gov/cciio/programs-and-initiatives/health-insurance-marketplaces/a-b-resources.html which is updated on a bi-weekly basis.

Registration and Training Overview

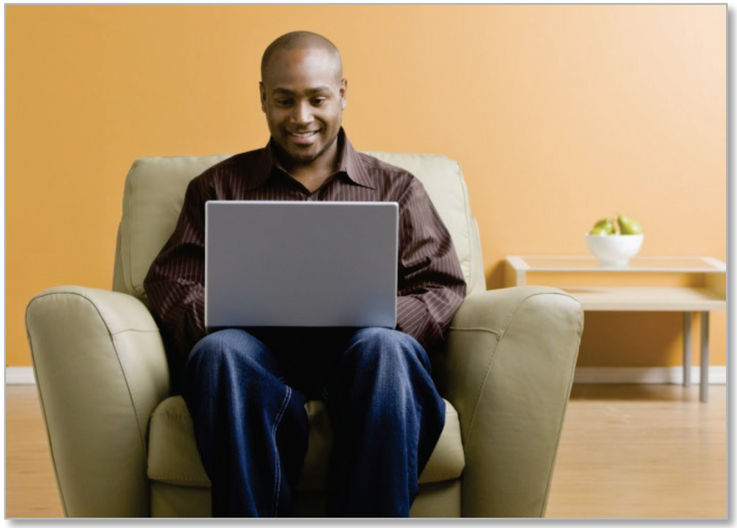
- For plan year 2016, CMS has eleven training modules available:
  - Welcome
  - Affordable Care Act Basics
  - Marketplace Basics
  - Individual Marketplace Eligibility for Enrolling in a QHP
  - Individual Marketplace Eligibility for Enrolling in an Insurance Affordability Program (IAP)
  - Individual Marketplace Enrollment
  - Privacy Standards and Definitions
  - Protecting and Handling Personally Identifiable Information (PII)
  - Information Security
  - FF-SHOP Marketplace Employer
  - FF-SHOP Marketplace Qualified Employee
- CMS will also be offering all training modules and exams in Spanish for plan year 2016.

Depending on the market segment (i.e., individual market or SHOP) in which an FFM registered agent or broker is assisting consumers, the training requirements vary.

Registration and Training Overview

CMS has four exams associated with the training modules:

- Affordable Care Act and Marketplace Basics
- Individual Marketplace
- Privacy and Security Standards
- SHOP Marketplace



Registration and Training Overview

Enhancements for FFM Agent and Broker Training for Plan Year 2016

While most of the training content is the same as in plan year 2015, there are a few new features for plan year 2016:

Plan Year 2016	Plan Year 2015
The option to take training from CMS-approved vendors	The only approved training was offered by CMS.
Agents and brokers may be able to receive CEU credits by completing training through a CMS-approved vendor, depending on the state in which they participate. CEU credits are not offered through the MLMS training hosted by CMS.	CMS did not offer continuing education unit (CEU) credits to agents and brokers for completing training.
Training has been streamlined into 11 focused modules and the content has been updated to reflect plan year 2016 policies.*	CMS offered four training modules.
The new MLMS system replaces the previously-used MLN.	Agents and brokers accessed training through the MLN.

**The total time to complete all trainings is the same as in plan year 2015, but the more specific modules allow agents and brokers to review the different topics in smaller pieces.*

Registration and Training Overview

Agents and brokers must execute the Agreement(s) associated with the Marketplace(s) they are participating in:

- **Individual Marketplace General Agreement:** includes terms for complying with federal and state laws, rules, standards, and policies.
- **Individual Marketplace Privacy and Security Agreement:** includes privacy and security policies for protecting consumers' PII. The FFM privacy standards are consistent with the eight principles outlined in 45 CFR 155.260(a).
- **SHOP Marketplace Agreement:** includes privacy and security policies for protecting consumers' PII. The FFM privacy standards are consistent with the eight principles outlined in 45 CFR 155.260(a).

Registration and Training Overview

Upon successful completion of all registration requirements, an agent or broker is able to generate a registration completion certificate specific to the market segment(s) (i.e., individual market or SHOP) for which they signed the Agreement(s).

- The issuer(s) with which an agent or broker is affiliated may request to view his or her registration completion certificate(s).
- However, issuers are instructed to review the registration completion list published by CMS to confirm the registration status of agents and brokers.

Ensuring an Agent's or Broker's National Producer Number is Associated with Profile

Agents and brokers must enter a correct NPN in their MLMS profiles and should verify it is correct to receive credit for completing training.

- The NPN can be up to 10 digits long and must not begin with a zero.
- The NPN must not include any special characters or letters.
- The NPN is generally not the same as the agent's or broker's state license number. The agent or broker should be sure to use his or her NPN, not a state license number.
- To update the NPN, agents and brokers can click on the "Complete Agent Broker Training" hyperlink and update the information in their MLMS profiles.
- Agent and broker NPNs can be found at: www.nipr.com/PacNpnSearch.htm.

Entering an inaccurate NPN could result in denial of compensation/credit by an issuer.

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FFM Agent and Broker CMS-approved Vendor Training Option

CMS-approved Vendor Training Option

- For plan year 2016, CMS has approved three vendors to offer FFM training to agents and brokers to fulfill the plan year 2016 training requirement.
- The CMS-approved vendors for plan year 2016 are:
  - America's Health Insurance Plans, Inc. (AHIP): for more information go to https://www.ahipexchangetraining.com/file.php/1/public/About.html
  - Gorman Health Group: for more information go to http://www.exchangebrokertraining.com
  - National Association of Health Underwriters (NAHU): for more information go to http://www.nahu.org/education/ffmtraining/index.cfm or for CEU credit information visit https://www.netstudy.com/nahu

CMS-approved Vendor Training Option

- Agents and brokers who chose to complete training through a CMS-approved vendor can access the vendor's training via the MLMS and do not need to go directly to the vendor's website to access the training content.
- CMS-approved vendors may charge a fee to agents and brokers that choose to take their training.
- Agents and brokers who complete FFM training through a CMS-approved vendor still need to execute the applicable Agreements on the MLMS prior to assisting consumers seeking to enroll in coverage through the FFMs.
- New users will also need to create an account, request the agent/broker role, and complete identity proofing on the CMS Enterprise Portal.

CMS-approved Vendor Training Option

The benefits of completing training through a CMS-approved vendor include:

- CMS-approved vendors are required to offer continuing education unit (CEU) credits in a minimum of five states where the FFM is operating (45 C.F.R. § 155.222). The states where CEUs are offered may vary by CMS-approved vendor.
- Completion of a training curriculum, including the associated exams, through one of the CMS-approved vendors will fulfill the FFM training requirements for agents and brokers registering to participate in the Individual Marketplace.
- CMS-approved vendors are required to cover, at a minimum, the same topic areas as are covered in the CMS training.

Guidance on Plan Year 2016 Federally-facilitated Marketplace Registration and Training

FFM Agent and Broker Registration and Training Process Steps

Process for Registration and Training Completion

Agents and brokers must complete seven steps to become fully-registered to participate in the FFMs for plan year 2016:

1. Create a CMS Enterprise Portal account *(new users only)*
2. Request the FFM Agent/Broker role *(new users only)*
3. Conduct identity proofing within the CMS Enterprise Portal *(new users only)*
4. Complete profile information
5. Complete training
6. Execute Agreement(s)
7. Confirm completion on the Agent/Broker Registration Status page on the CMS Enterprise Portal

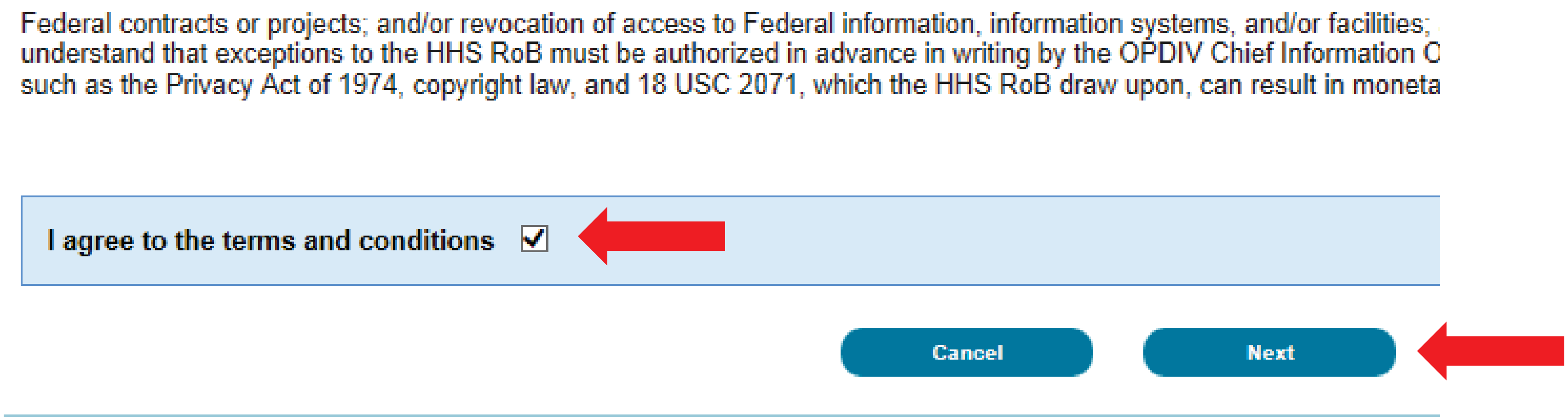
Step 1: Agent or Broker Creates a CMS Enterprise Portal Account

Once at https://portal.cms.gov, click on "New User Registration."

Agents and brokers with an existing account do not need to create a new account.

Step 1: Agent or Broker Creates a CMS Enterprise Portal Account

After reading and agreeing to the terms and conditions, click the "I agree to the terms and conditions" and click "Next."



Agents and brokers with an existing account do not need to create a new account.

Step 1: Agent or Broker Creates a CMS Enterprise Portal Account

Enter all personal information and then click "Next."

Agents and brokers with an existing account do not need to create a new account.

Step 1: Agent or Broker Creates a CMS Enterprise Portal Account

- Create a User ID and password.
- Choose challenge questions and provide answers.
- Then click “Next.”

Agents and brokers with an existing account do not need to create a new account.

Step 1: Agent or Broker Creates a CMS Enterprise Portal Account

- The CMS Enterprise Portal will notify you that the account is created and you can click "OK."
- You will receive an email to the address you listed in your account notifying you that your account was successfully created.

Agents and brokers with an existing account do not need to create a new account.

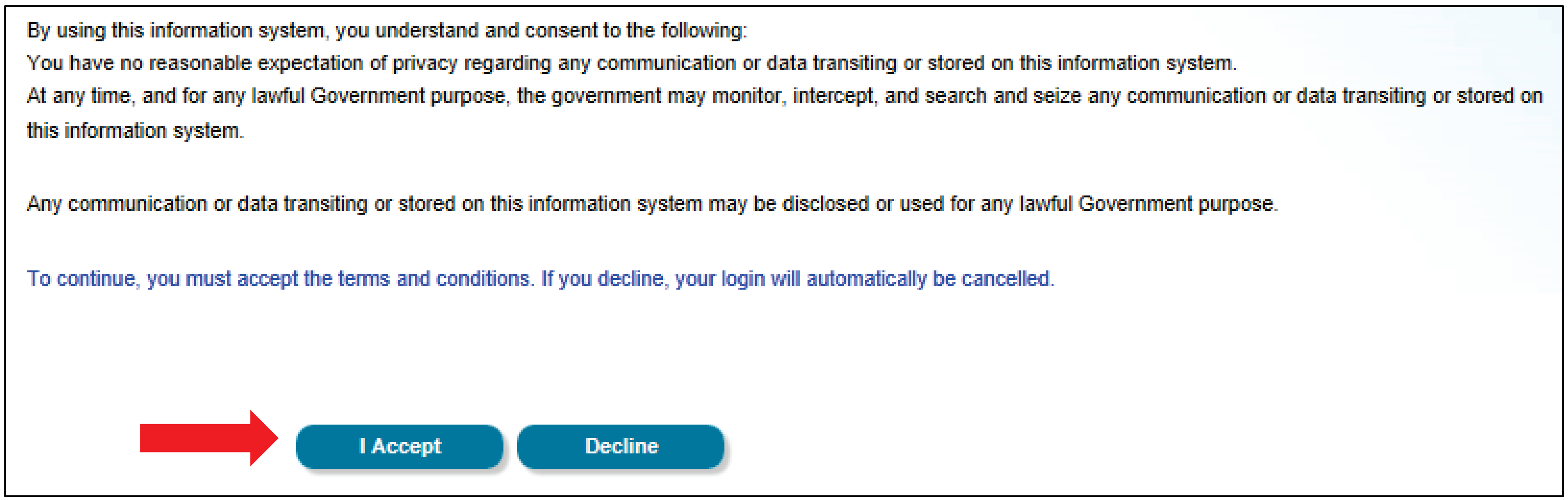
Step 2: Agent or Broker Requests the FFM Agent/Broker Role

Once you receive your account creation notification via email, or after waiting a few minutes for the system to update, log back into the CMS Enterprise Portal by clicking "Login to CMS Secure Portal" at https://portal.cms.gov.

Agents and brokers with an existing role do not need to re-request it.

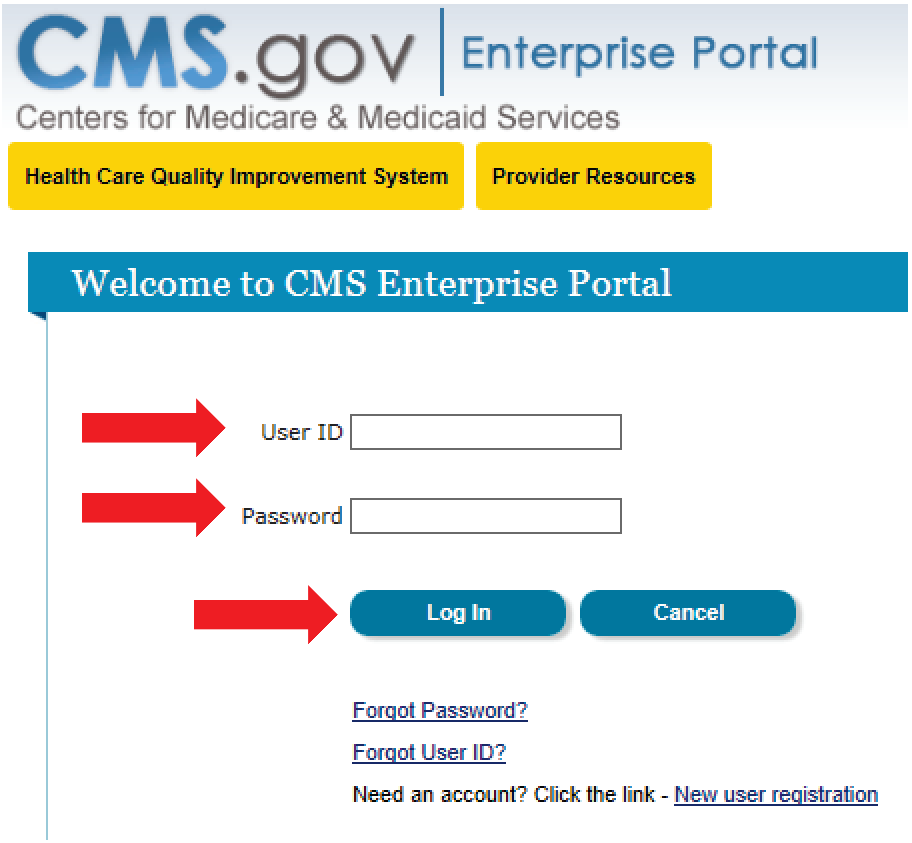
Step 2: Agent or Broker Requests the FFM Agent/Broker Role

Read the terms and conditions and accept by clicking "I Accept."



Agents and brokers with an existing role do not need to re-request it.

Step 2: Agent or Broker Requests the FFM Agent/Broker Role

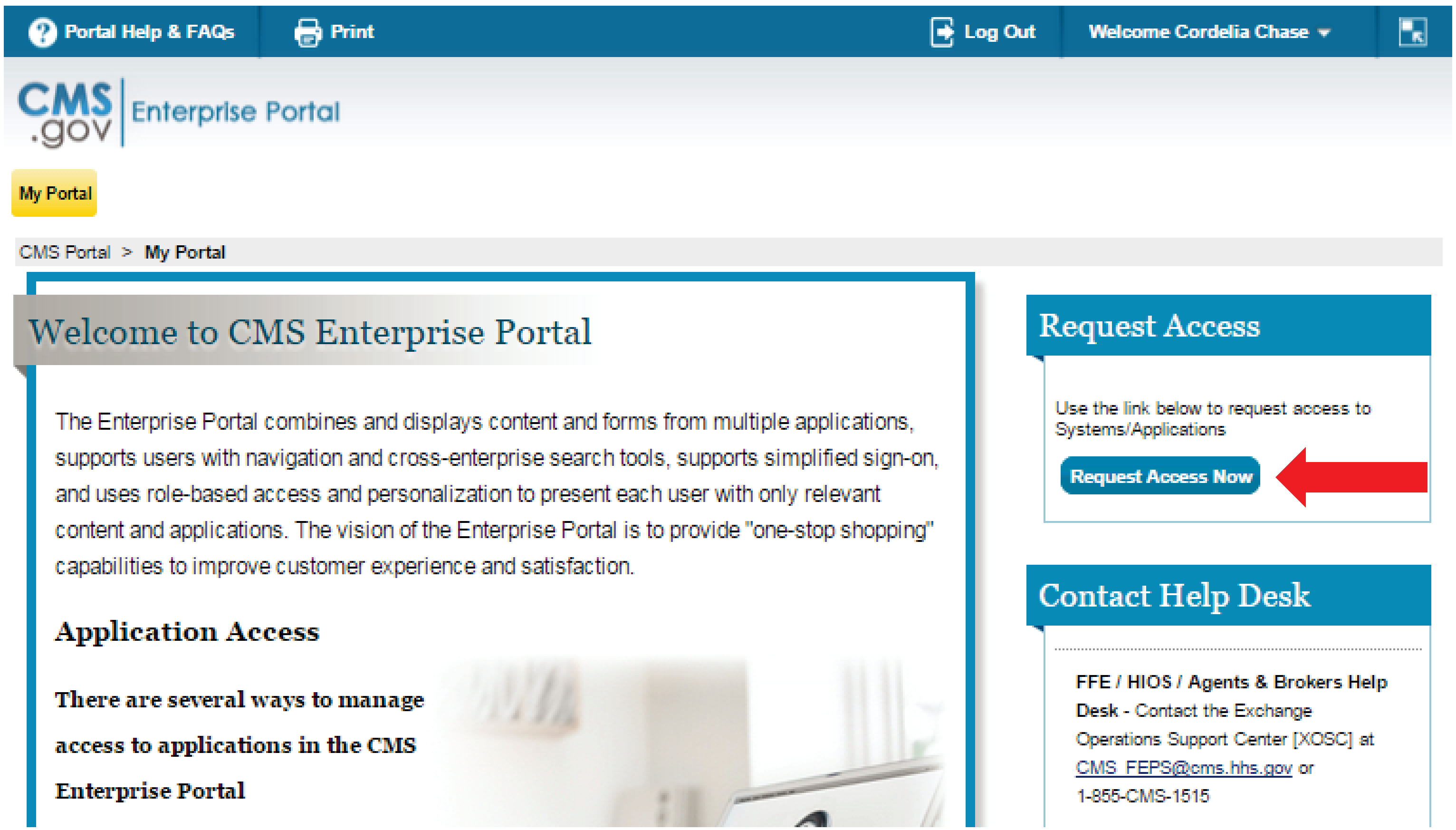


- Enter your User ID and password that you created when setting up your CMS Enterprise Portal account in Step 1.
- Then click "Log In."

Agents and brokers with an existing role do not need to re-request it.

Step 2: Agent or Broker Requests the FFM Agent/Broker Role

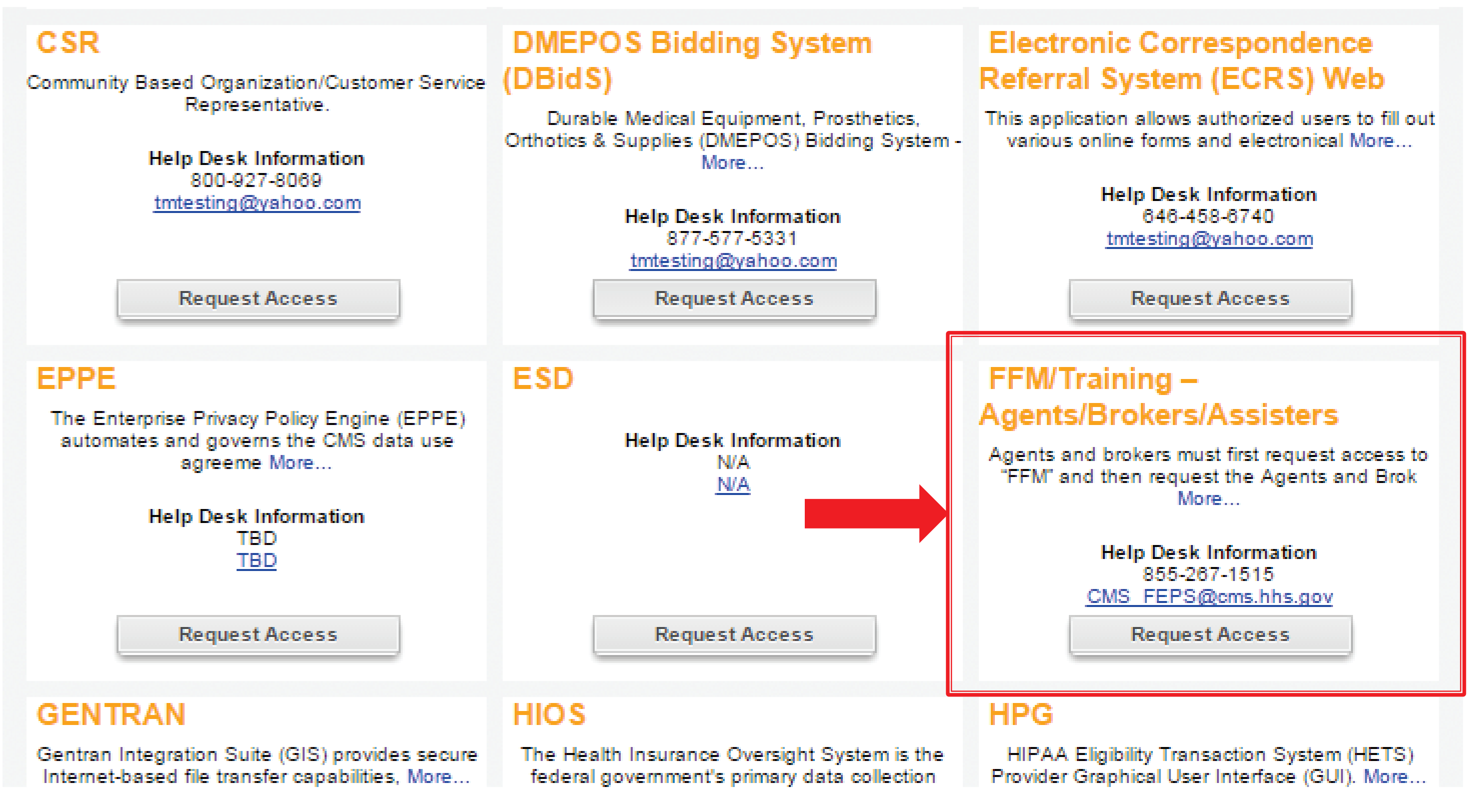
Click on “Request Access Now.”



Agents and brokers with an existing role do not need to re-request it.

Step 2: Agent or Broker Requests the FFM Agent/Broker Role

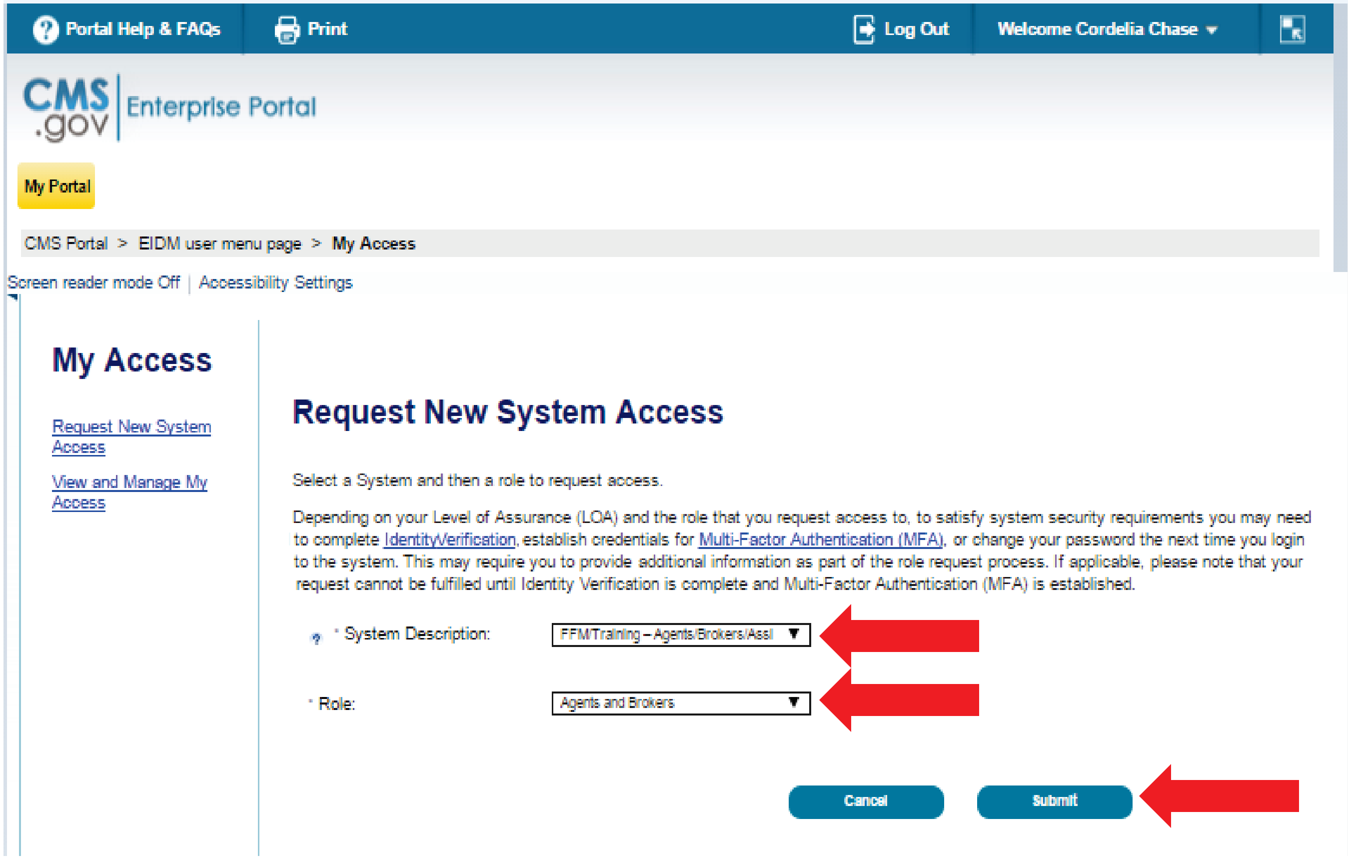
Scroll down the list of roles, or enter “F” in the search box, to find the “FFM/Training – Agents/Brokers/Assisters” role and click “Request Access.”



Agents and brokers with an existing role do not need to re-request it.

Step 2: Agent or Broker Requests the FFM Agent/Broker Role

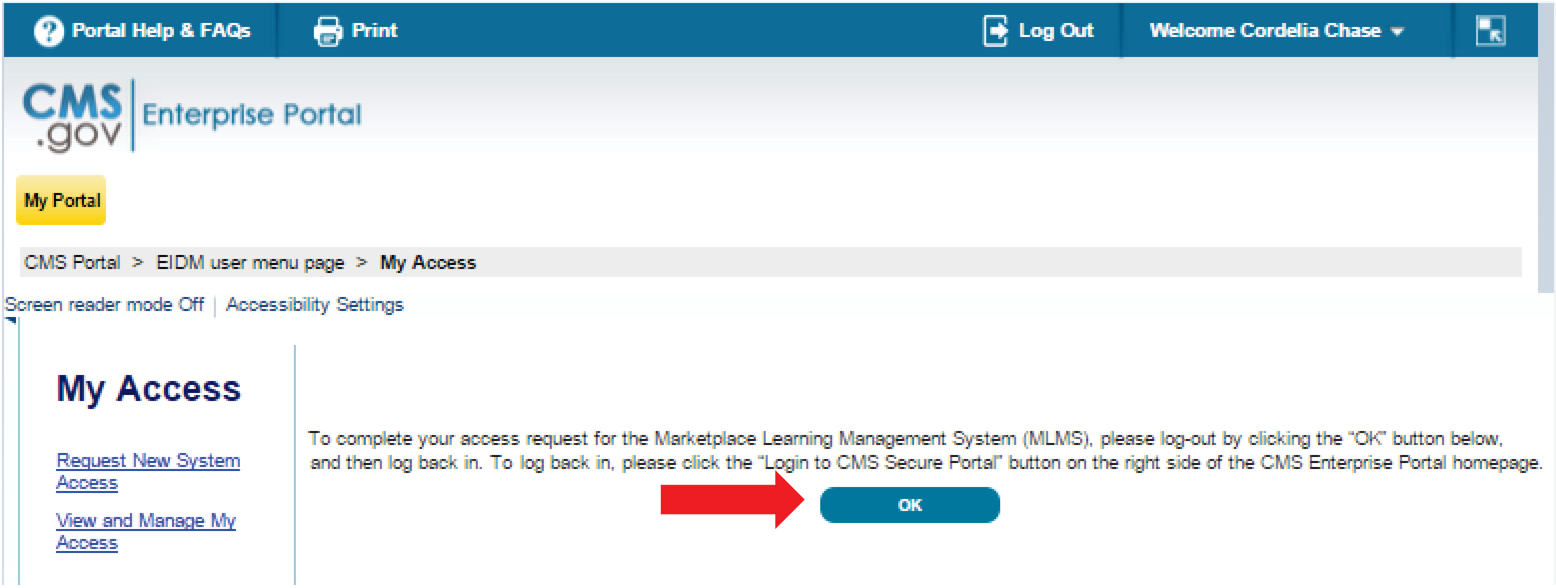
- Select "FFM/Training – Agents/Brokers/Assisters" from the "System Description" drop-down menu.
- Then select "Agents and Brokers" from the "Role" drop-down menu.
- Click "Submit."



Agents and brokers with an existing role do not need to re-request it.

Step 2: Agent or Broker Requests the FFM Agent/Broker Role

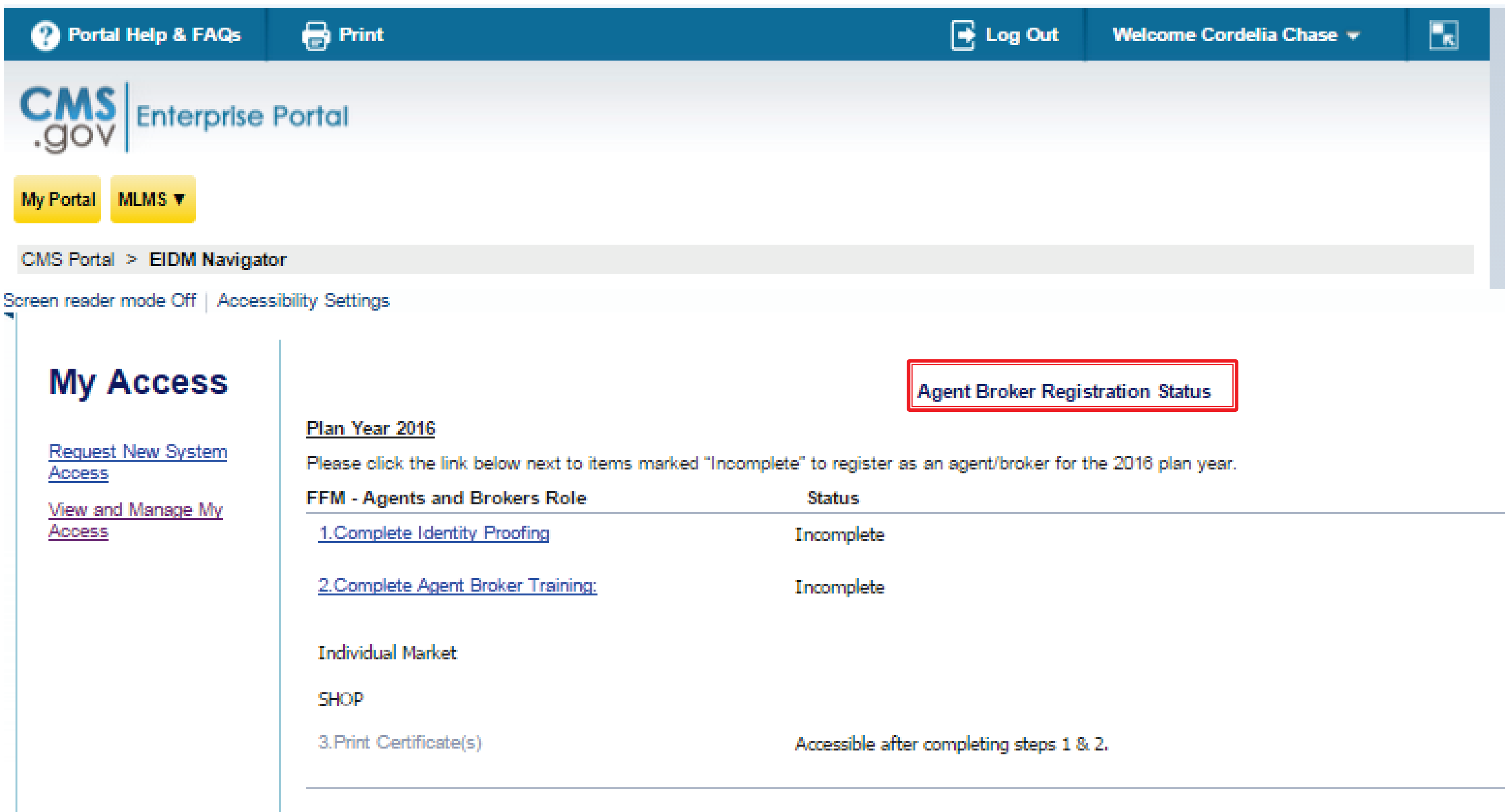
To complete your role request, click "OK."



Agents and brokers with an existing role do not need to re-request it.

Step 2: Agent or Broker Requests the FFM Agent/Broker Role

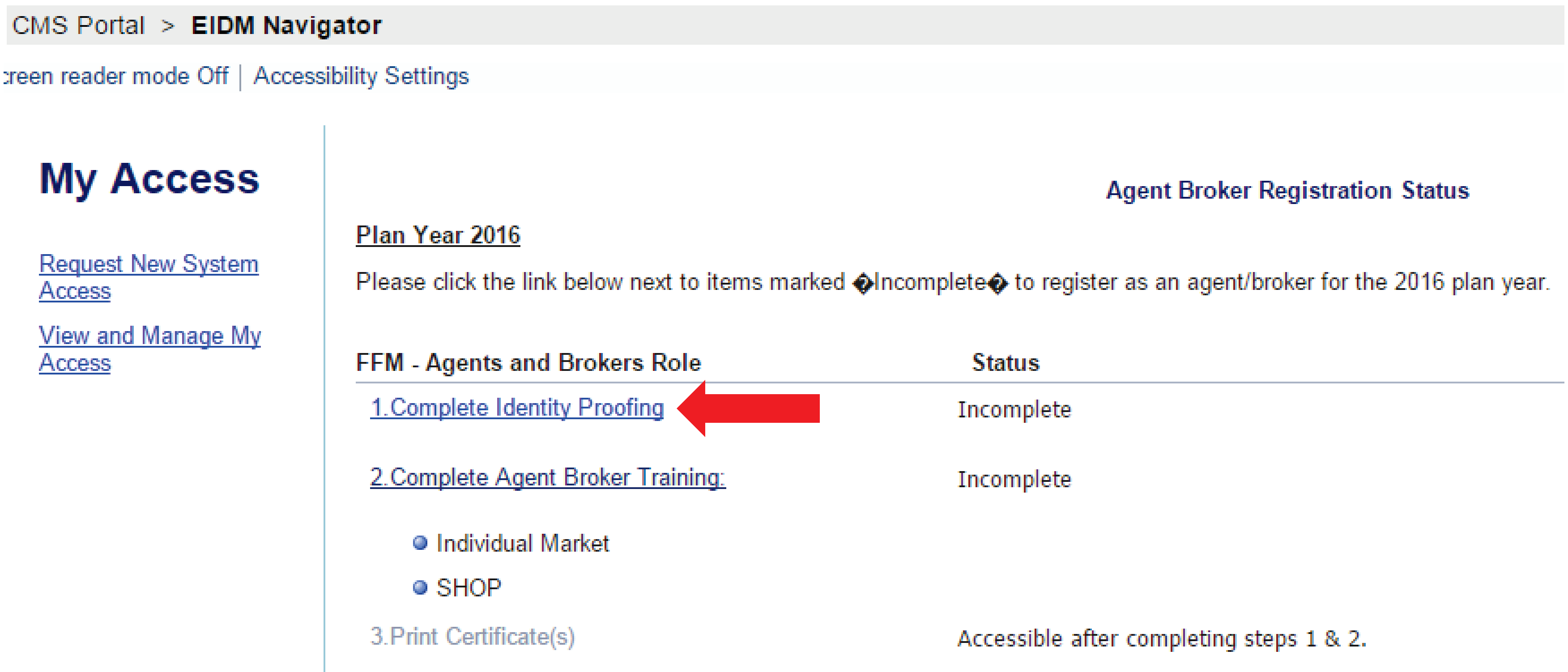
After waiting a few minutes, log back in to the CMS Enterprise Portal and you will be redirected to the Agent Broker Registration Status page.



Agents and brokers with an existing role do not need to re-request it.

Step 3: Agent or Broker Conducts Identity Proofing within CMS Enterprise Portal

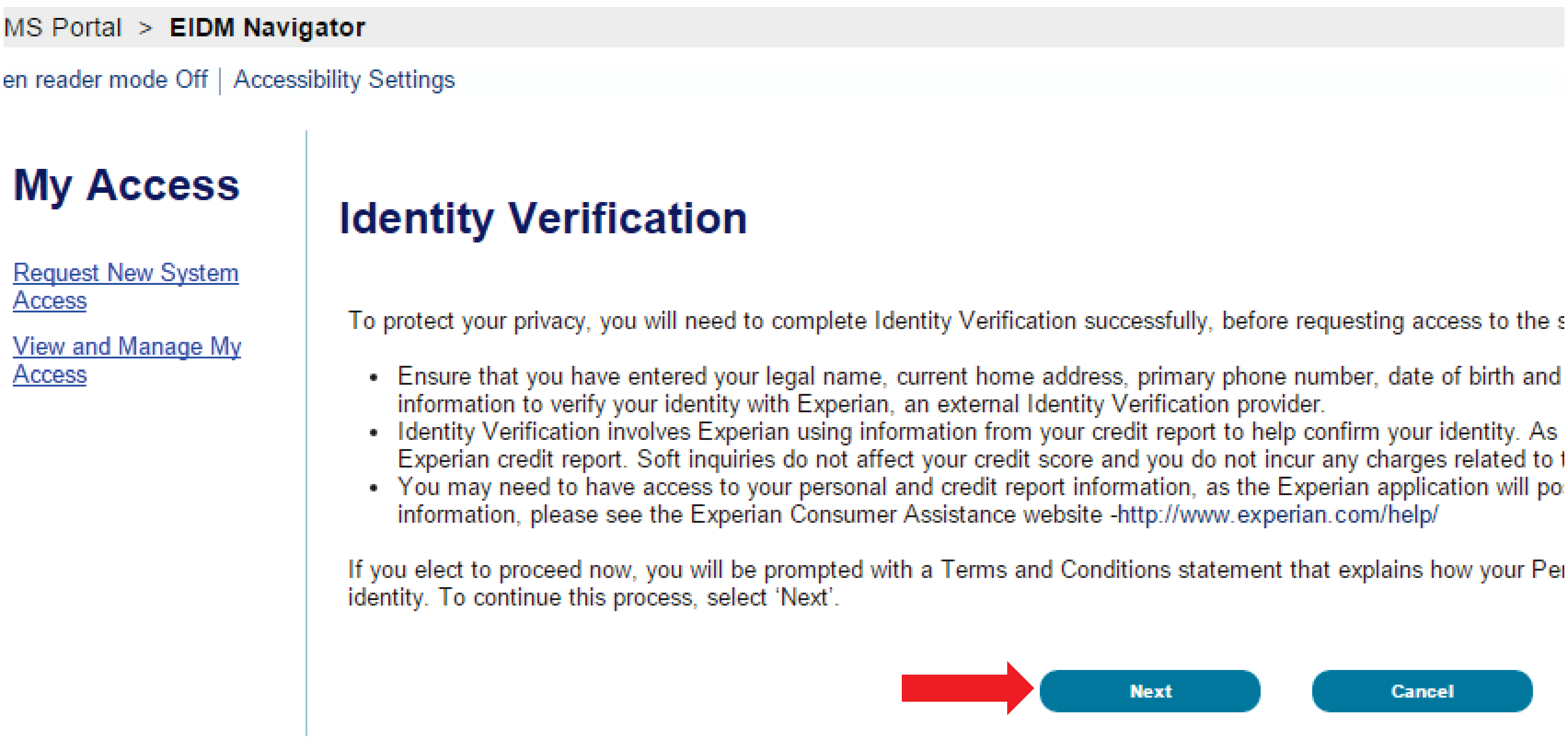
- On the Agent Broker Registration Status page, click on "Complete Identity Proofing" to begin identity proofing.
- Identity proofing can be completed before or after training is completed.



Agents and brokers with an existing account do not need to complete identity proofing again.

Step 3: Agent or Broker Conducts Identity Proofing within CMS Enterprise Portal

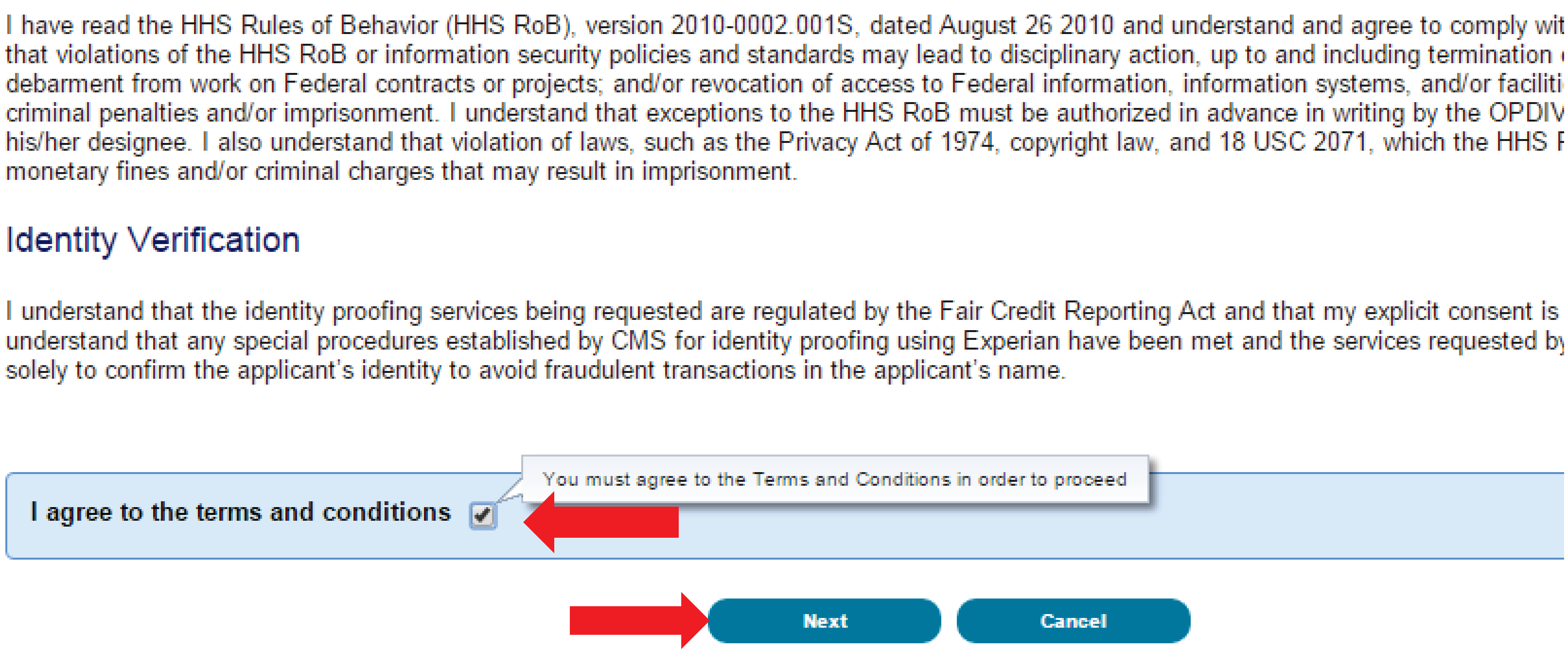
Read the instructions and click "Next."



Agents and brokers with an existing account do not need to complete identity proofing again.

Step 3: Agent or Broker Conducts Identity Proofing within CMS Enterprise Portal

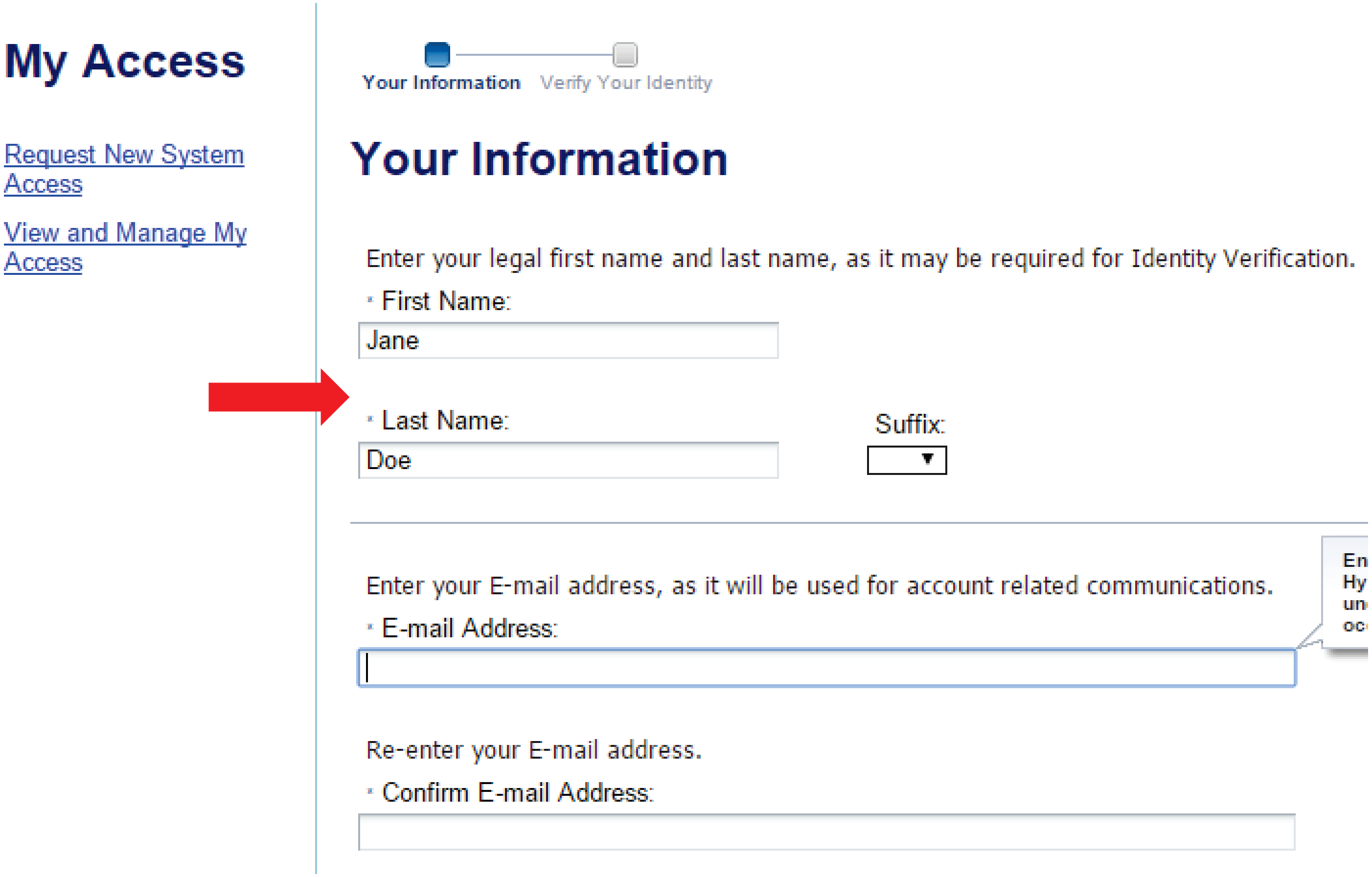
Read the terms and conditions and accept by checking the box and clicking "Next."



Agents and brokers with an existing account do not need to complete identity proofing again.

Step 3: Agent or Broker Conducts Identity Proofing within CMS Enterprise Portal

- Confirm the information that automatically populates and enter any missing information (e.g., confirm email address, enter Social Security number).
- Then click “Next” to submit your information for verification.

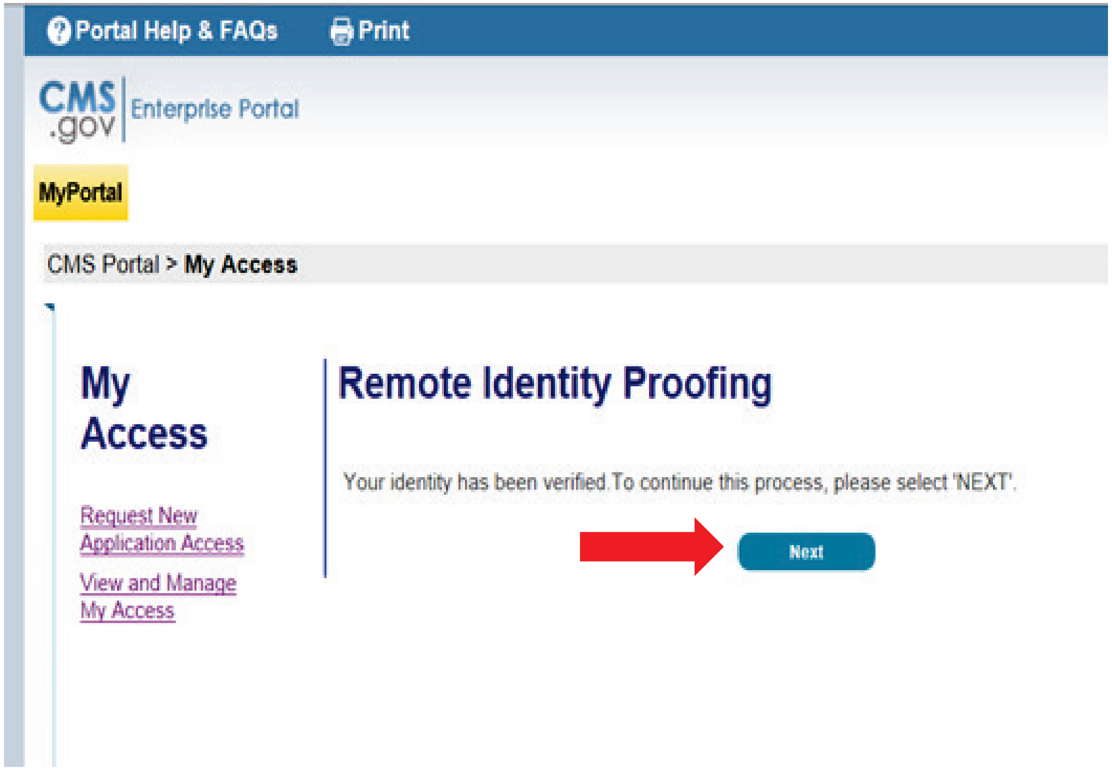


Agents and brokers with an existing account do not need to complete identity proofing again.

Step 3: Agent or Broker Conducts Identity Proofing within CMS Enterprise Portal

- Once you receive confirmation that your identity has been verified, click “Next.”

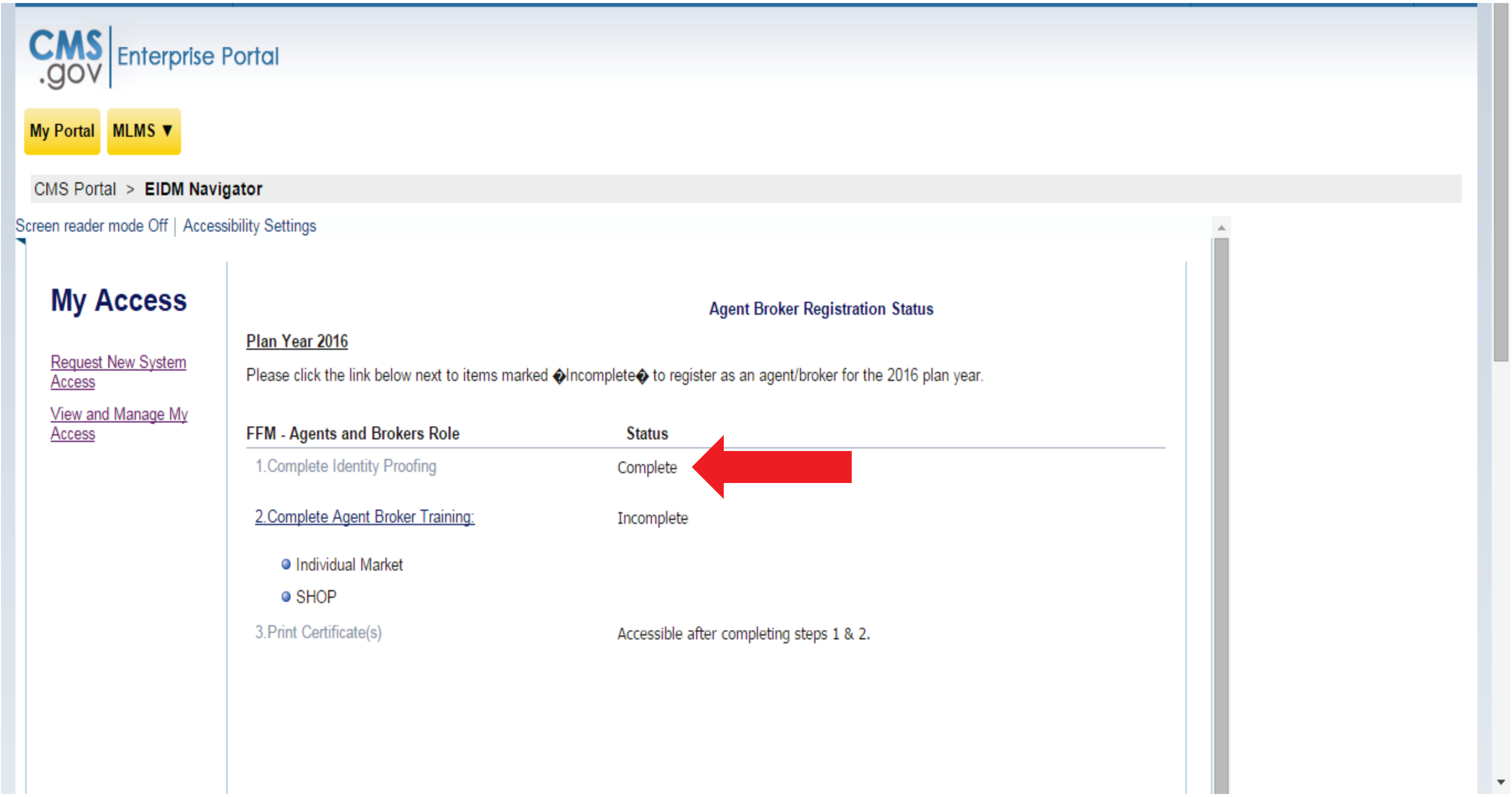
- If your information cannot be verified remotely (i.e., electronically), the CMS Enterprise Portal will provide you with a phone number and code to confirm your identity directly with Experian, CMS’ identity proofing vendor.



Agents and brokers with an existing account do not need to complete identity proofing again.

Step 3: Agent or Broker Conducts Identity Proofing within CMS Enterprise Portal

You will then be redirected to the Agent Broker Registration Status page and the status of your identity proofing step will marked as "Complete."



Agents and brokers with an existing account do not need to complete identity proofing again.

Step 4: Agent or Broker Completes Profile Information

- At this time, the agent/broker will need to enter Agent/Broker profile information, including NPN and Find Local Help listing preference, in the MLMS.
- Agents and brokers who complete training through a CMS-approved vendor can complete their MLMS profile information before or after training is completed.

Step 4: Agent or Broker Completes Profile Information

To complete your profile, select the “Access Training” link next to the MLMS.

Plan Year 2016 Agent/Broker Training Options

Agents and brokers have new options to complete Individual Marketplace and/or SHOP Marketplace training for the 2016 plan year. These incluc vendor training may be approved for continuing education units (CEUs). Select "Learn More" next to each vendor's listing to obtain information al contact the vendor for more information, or if you are having difficulty accessing the vendor's site.

CMS continues to offer training at no charge through its Marketplace Learning Management System (MLMS), but no CEUs are available through t

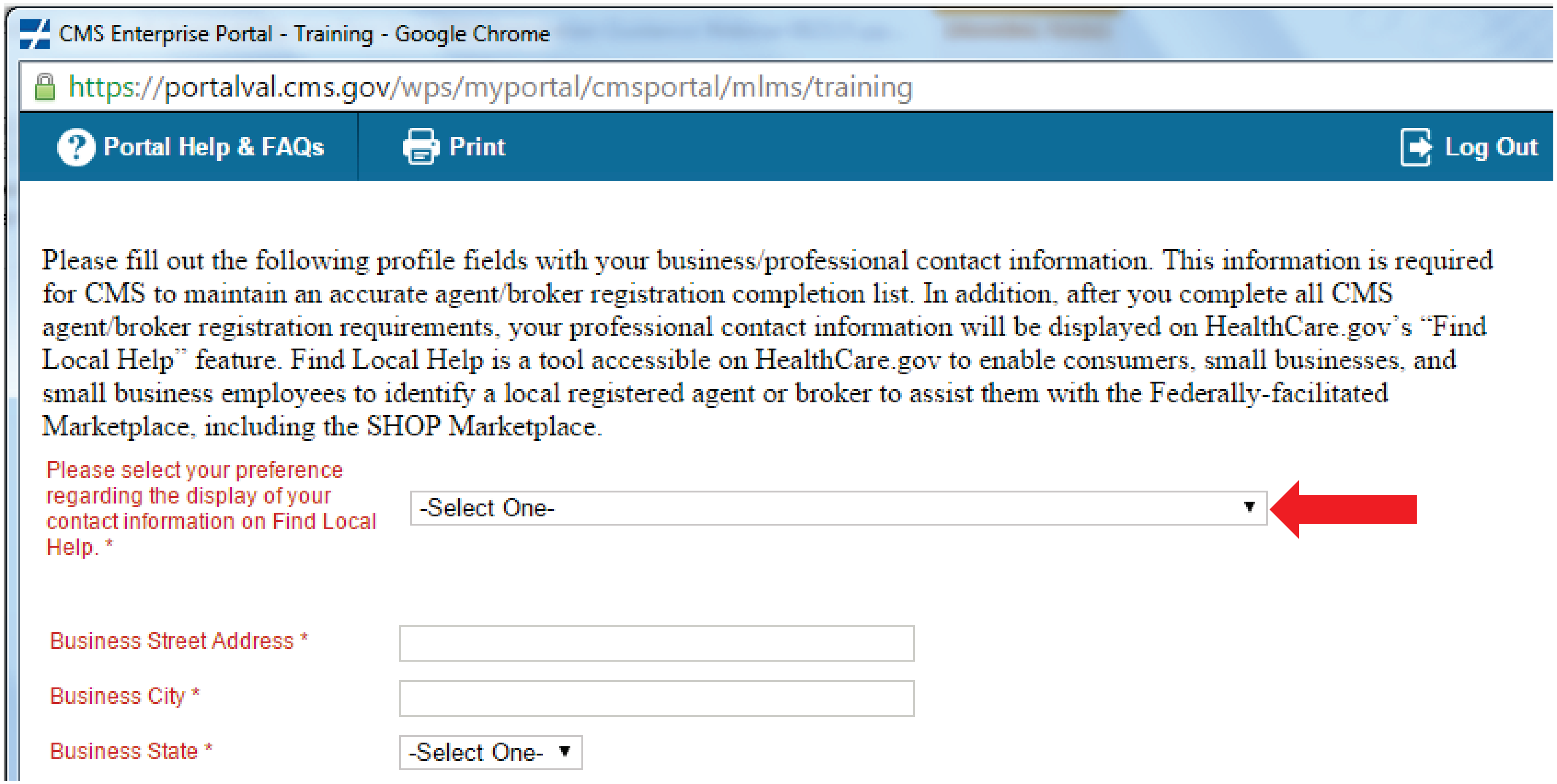
If you select a vendor to complete training, you are consenting to being securely redirected to that third-party vendor's site. After you complete t completion confirmation code and instructions to access the MLMS (i.e., CMS's system) to complete the agent/broker registration process.

CMS-approved Vendor # 1	Learn More	Access Training	555-555-1212
CMS-approved Vendor # 2	Learn More	Access Training	555-555-1213
CMS-approved Vendor # 3	Learn More	Access Training	555-555-1214
Marketplace Learning Management System (CMS)		Access Training	MLMSHelpDesk@cms.hhs.gov

Return to Agent Broker Registration Status Page

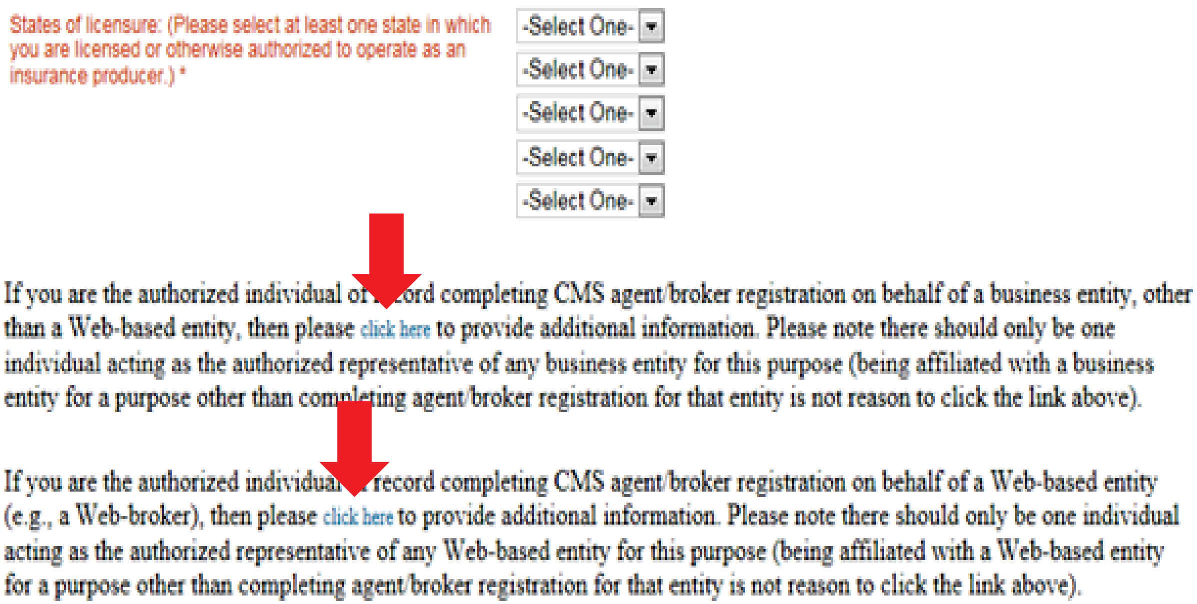
Step 4: Agent or Broker Completes Profile Information

Once the MLMS profile page appears, complete your profile information.



Step 4: Agent or Broker Completes Profile Information

- If you also act as the authorized representative for a web-broker or other business entity, you can add the web-broker's or business entity's NPN by clicking the appropriate "click here" link at the bottom of the profile page.
- If you list the web-broker's or other business entity's NPN, once you have completed registration, the registration for the additional NPNs you listed will also be complete.
- Up to three NPNs can be listed in one profile.


States of licensure: (Please select at least one state in which you are licensed or otherwise authorized to operate as an insurance producer.) *

-Select One-
-Select One-
-Select One-
-Select One-
-Select One-

If you are the authorized individual of record completing CMS agent/broker registration on behalf of a business entity, other than a Web-based entity, then please click here to provide additional information. Please note there should only be one individual acting as the authorized representative of any business entity for this purpose (being affiliated with a business entity for a purpose other than completing agent/broker registration for that entity is not reason to click the link above).

If you are the authorized individual of record completing CMS agent/broker registration on behalf of a Web-based entity (e.g., a Web-broker), then please click here to provide additional information. Please note there should only be one individual acting as the authorized representative of any Web-based entity for this purpose (being affiliated with a Web-based entity for a purpose other than completing agent/broker registration for that entity is not reason to click the link above).

Step 4: Agent or Broker Completes Profile Information

An additional set of information fields will appear. Enter the information for the web-broker or business entity with which you are affiliated.

If you are the authorized individual of record completing CMS agent/broker registration on behalf of a business entity, other than a Web-based entity, then please click here to provide additional information. Please note there should only be one individual acting as the authorized representative of any business entity for this purpose (being affiliated with a business entity for a purpose other than completing agent/broker registration for that entity is not reason to click the link above).

Business Entity Name *

Business Entity Street Address *

Business Entity City *

Business Entity State * -Select One-

Business Entity Zip Code *

Business Entity Phone *

Business Entity Email *

Business Entity URL

Business Entity National Producer Number (NPN) (1-10 numeric characters not starting with zero) *

Confirm NPN *

Business entity states of licensure: (Please select at least one state in which this business entity is licensed or otherwise authorized to operate as an insurance producer.) *

-Select One-
-Select One-
-Select One-
-Select One-
-Select One-

Step 4: Agent or Broker Completes Profile Information

Once all your profile information is entered, click "Save/Update".

States of licensure: (Please select at least one state in which you are licensed or otherwise authorized to operate as an insurance producer.) *

-Select One-
-Select One-
-Select One-
-Select One-
-Select One-

If you are the authorized individual of record completing CMS agent/broker registration on behalf of a business entity, other than a Web-based entity, then please click here to provide additional information. Please note there should only be one individual acting as the authorized representative of any business entity for this purpose (being affiliated with a business entity for a purpose other than completing agent/broker registration for that entity is not reason to click the link above).

If you are the authorized individual of record completing CMS agent/broker registration on behalf of a Web-based entity (e.g., a Web-broker), then please click here to provide additional information. Please note there should only be one individual acting as the authorized representative of any Web-based entity for this purpose (being affiliated with a Web-based entity for a purpose other than completing agent/broker registration for that entity is not reason to click the link above).

To save your profile information, please click "Save" below.

Save/Update

Step 5: Agent or Broker Completes Training

With the new CMS-approved vendor training option, the system will allow each agent/broker to select which training option he or she wishes to complete (i.e., CMS-developed training via the MLMS or one of the CMS-approved vendor's trainings).

Plan Year 2016 Agent/Broker Training Options

Agents and brokers have new options to complete Individual Marketplace and/or SHOP Marketplace training for the 2016 plan year. These incluc vendor training may be approved for continuing education units (CEUs). Select "Learn More" next to each vendor's listing to obtain information al contact the vendor for more information, or if you are having difficulty accessing the vendor's site.

CMS continues to offer training at no charge through its Marketplace Learning Management System (MLMS), but no CEUs are available through t

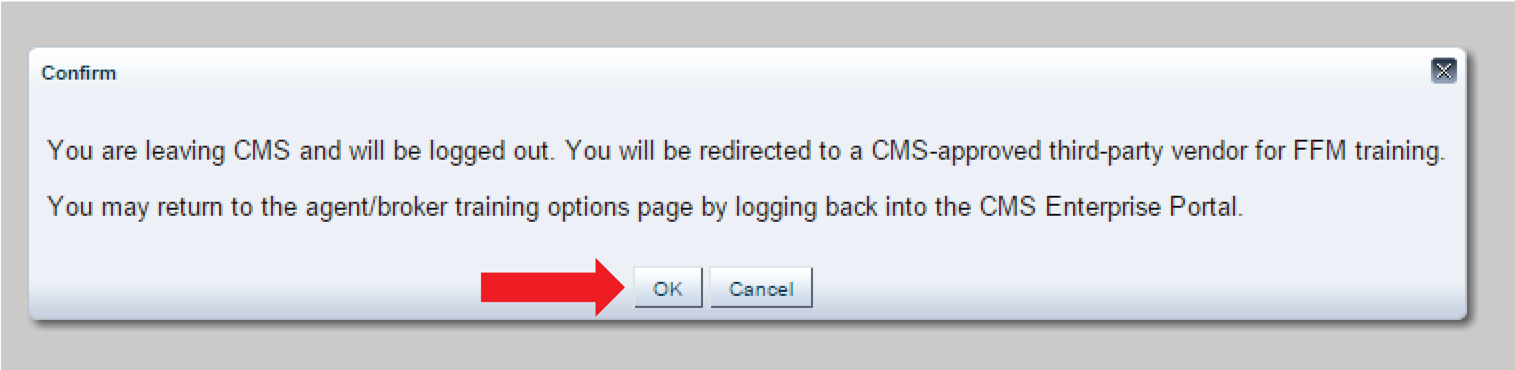
If you select a vendor to complete training, you are consenting to being securely redirected to that third-party vendor's site. After you complete t completion confirmation code and instructions to access the MLMS (i.e., CMS's system) to complete the agent/broker registration process.

CMS-approved Vendor # 1	Learn More	Access Training	555-555-1212
CMS-approved Vendor # 2	Learn More	Access Training	555-555-1213
CMS-approved Vendor # 3	Learn More	Access Training	555-555-1214
Marketplace Learning Management System (CMS)		Access Training	MLMSHelpDesk@cms.hhs.gov

Return to Agent Broker Registration Status Page

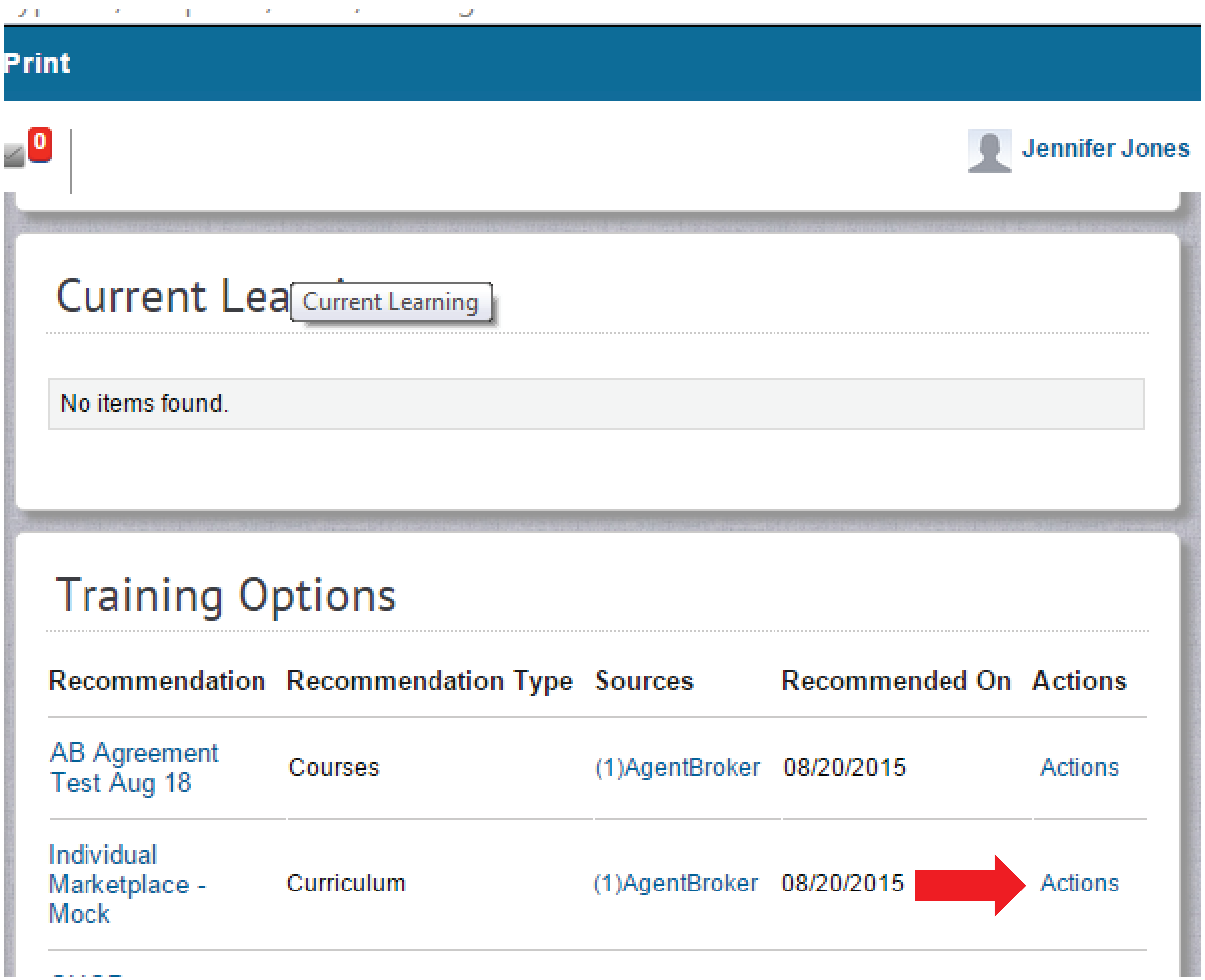
Step 5: Agent or Broker Completes Training

- If you chose to take training from one of the CMS-approved vendors, the system will securely redirect you to the selected CMS-approved vendor's learning management system, where you can complete the training and associated exams.
- Once you select "Access Training" for your chosen CMS-approved vendor, you'll see the pop-up box below.
- Click "OK" to confirm you want to be redirected to the CMS-approved vendor's website.



Step 5: Agent or Broker Completes Training

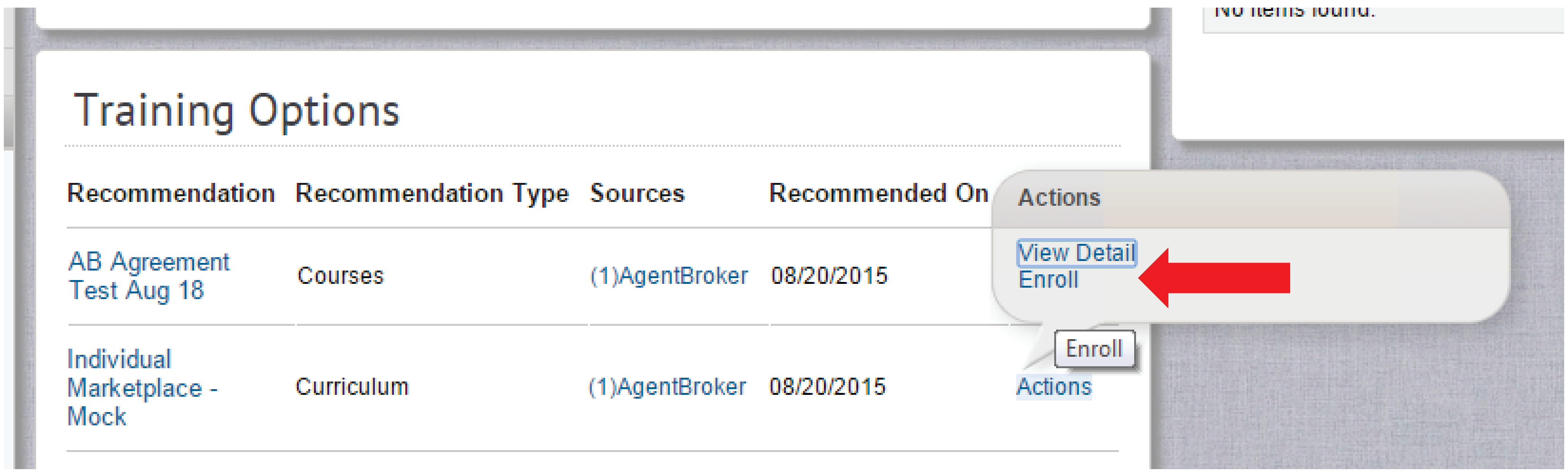
Identify the curriculum you wish to enroll in, and hover your cursor over the "Actions" link to the right of that curriculum.



These screenshots are from the MLMS and apply to the CMS-developed training. If you chose to take training through a CMS-approved vendor, the steps may be different.

Step 5: Agent or Broker Completes Training

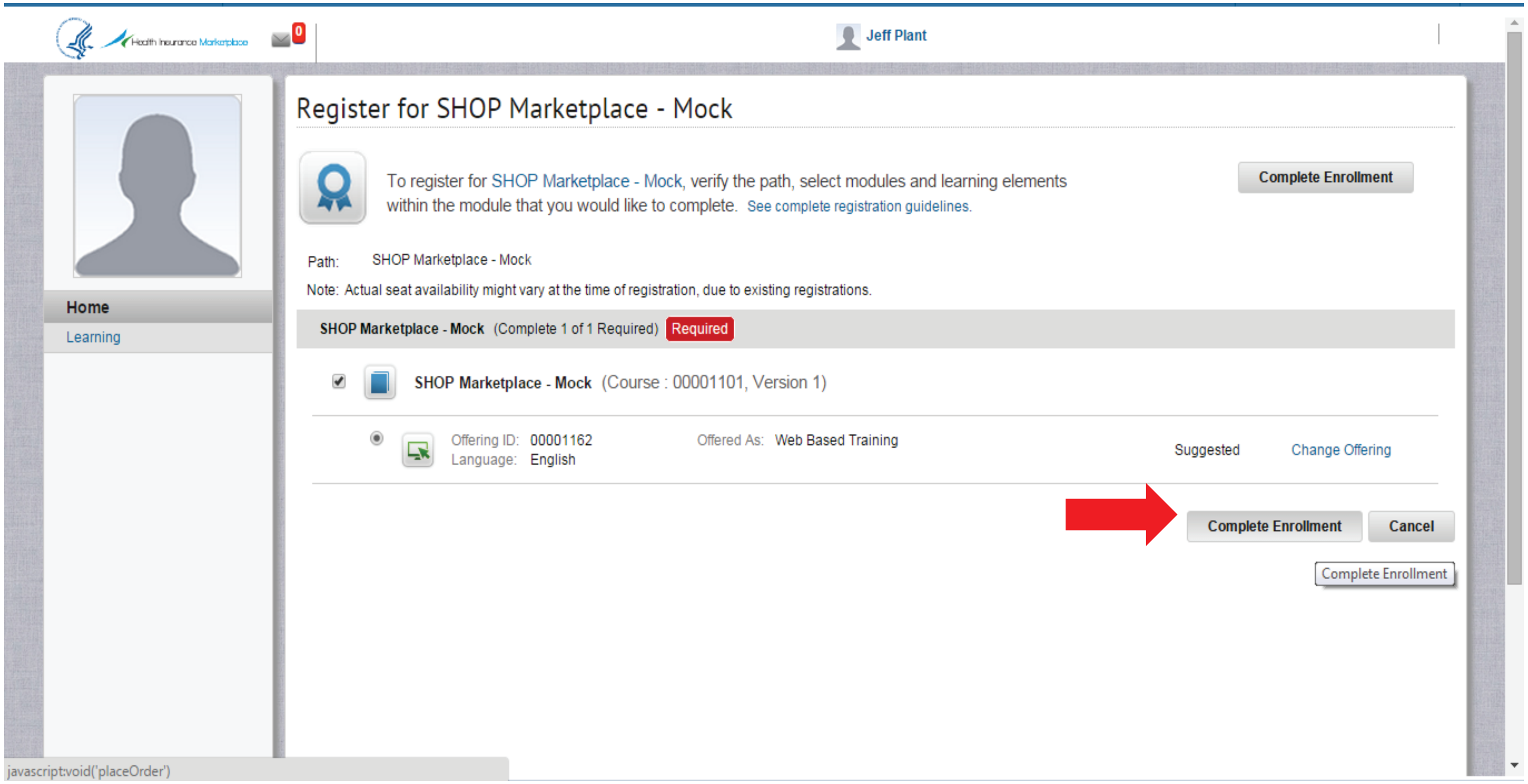
In the bubble that appears, click "Enroll."



These screenshots are from the MLMS and apply to the CMS-developed training. If you chose to take training through a CMS-approved vendor, the steps may be different.

Step 5: Agent or Broker Completes Training

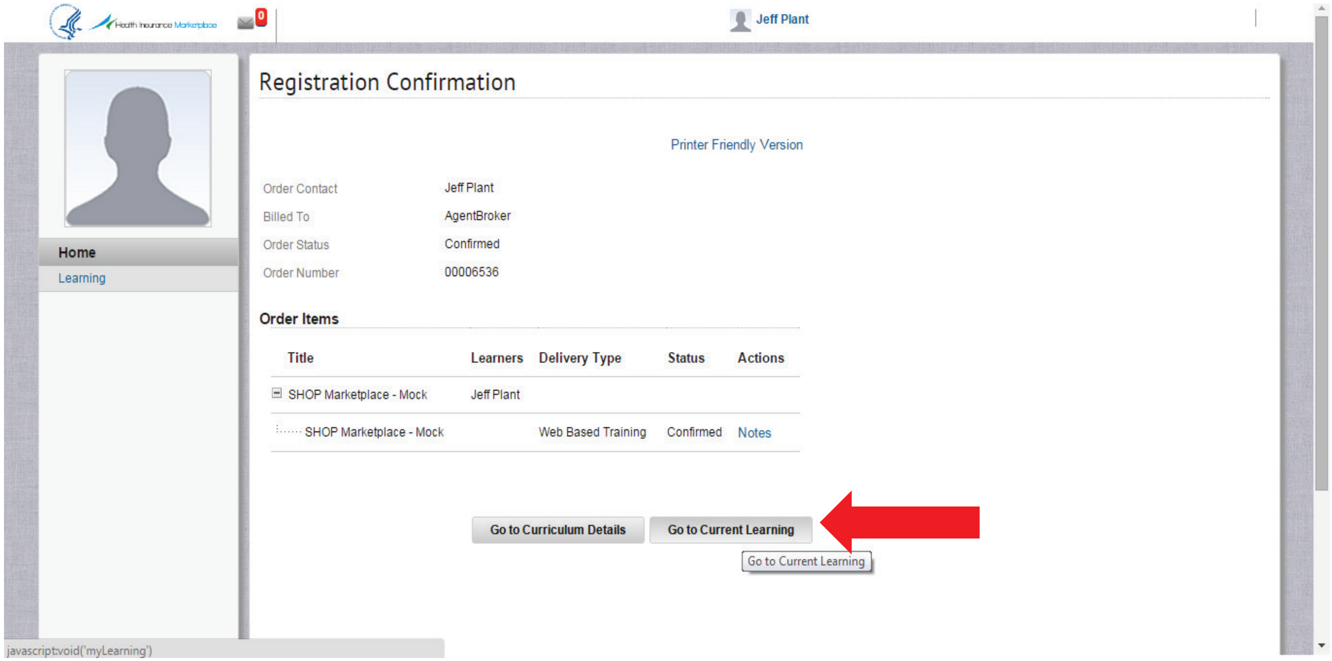
Then click "Complete Enrollment."



These screenshots are from the MLMS and apply to the CMS-developed training. If you chose to take training through a CMS-approved vendor, the steps may be different.

Step 5: Agent or Broker Completes Training

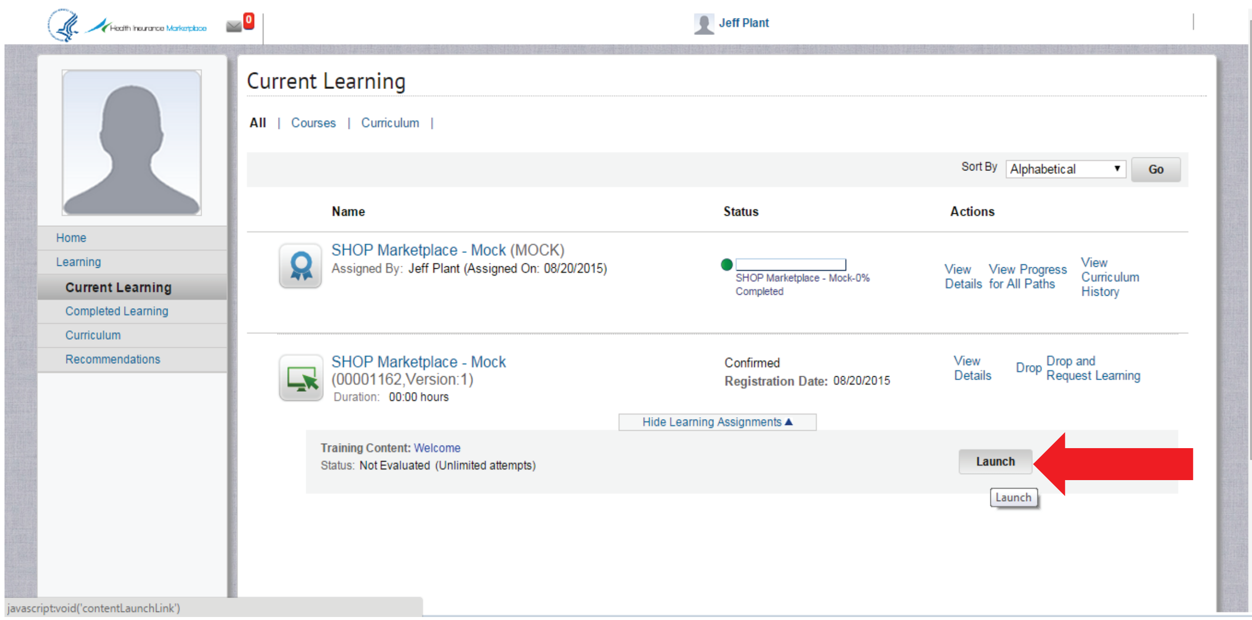
Click the "Go to Current Learning" button at the bottom of the page.



These screenshots are from the MLMS and apply to the CMS-developed training. If you chose to take training through a CMS-approved vendor, the steps may be different.

Step 5: Agent or Broker Completes Training

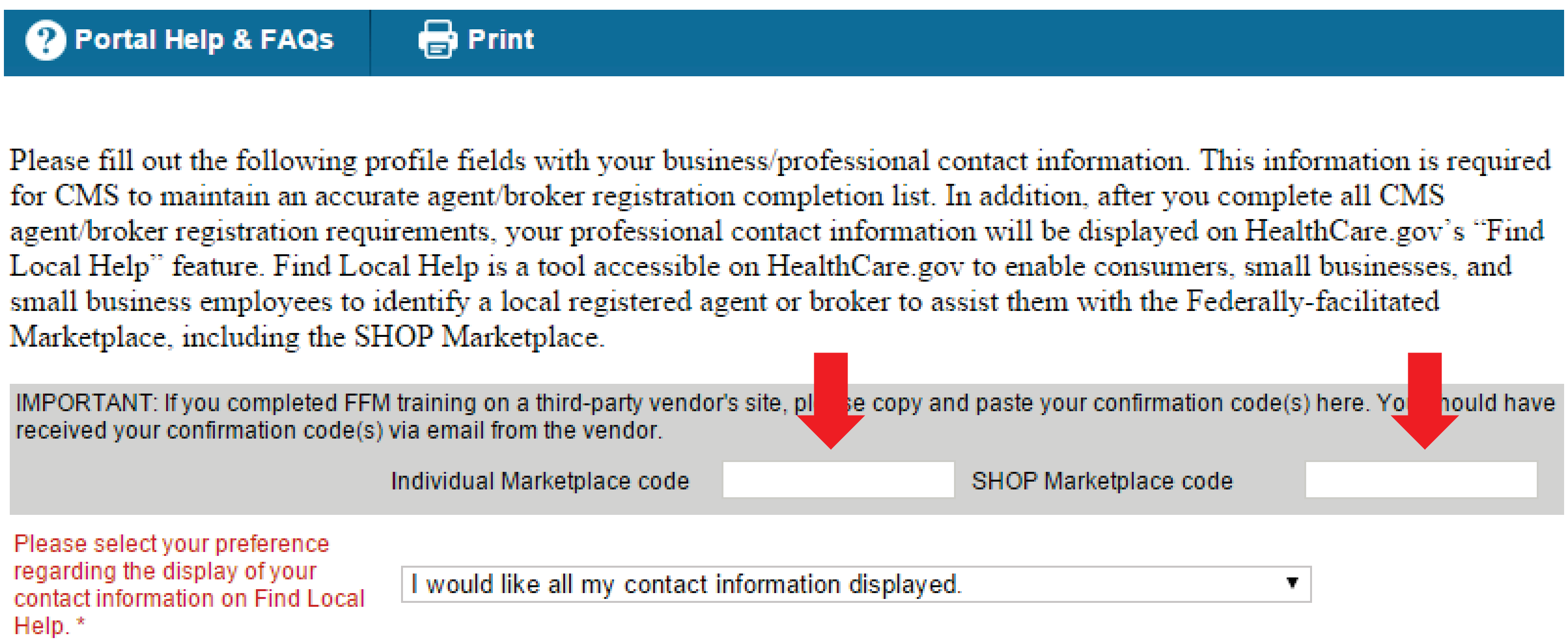
- You may start the curriculum's courses by clicking the "Launch" button next to each course.
- Note some courses have prerequisites, so there may not be a "Launch" button next to all of them.



These screenshots are from the MLMS and apply to the CMS-developed training. If you chose to take training through a CMS-approved vendor, the steps may be different.

Step 5: Agent or Broker Completes Training

- If you complete training through a CMS-approved vendor, you will receive a completion code via email from your chosen CMS-approved vendor 24 hours after you have completed a training curriculum.
- Copy and paste your confirmation code(s) into the appropriate code field on your MLMS profile page (e.g., if you completed SHOP Marketplace training, enter the SHOP Marketplace training confirmation code into the field to the right of "SHOP Marketplace code" in your MLMS profile).


Portal Help & FAQs | Print

Please fill out the following profile fields with your business/professional contact information. This information is required for CMS to maintain an accurate agent/broker registration completion list. In addition, after you complete all CMS agent/broker registration requirements, your professional contact information will be displayed on HealthCare.gov's "Find Local Help" feature. Find Local Help is a tool accessible on HealthCare.gov to enable consumers, small businesses, and small business employees to identify a local registered agent or broker to assist them with the Federally-facilitated Marketplace, including the SHOP Marketplace.

IMPORTANT: If you completed FFM training on a third-party vendor's site, pl se copy and paste your confirmation code(s) here. Yo hould have received your confirmation code(s) via email from the vendor.

Individual Marketplace code | SHOP Marketplace code

Please select your preference regarding the display of your contact information on Find Local Help. *

I would like all my contact information displayed.

Step 6: Agent or Broker Executes the Agent/Broker Agreement(s)

- An agent or broker must request the agent/broker role and complete his or her profile information, identity proofing, and the required training and exams before he or she can sign the Agreement(s).

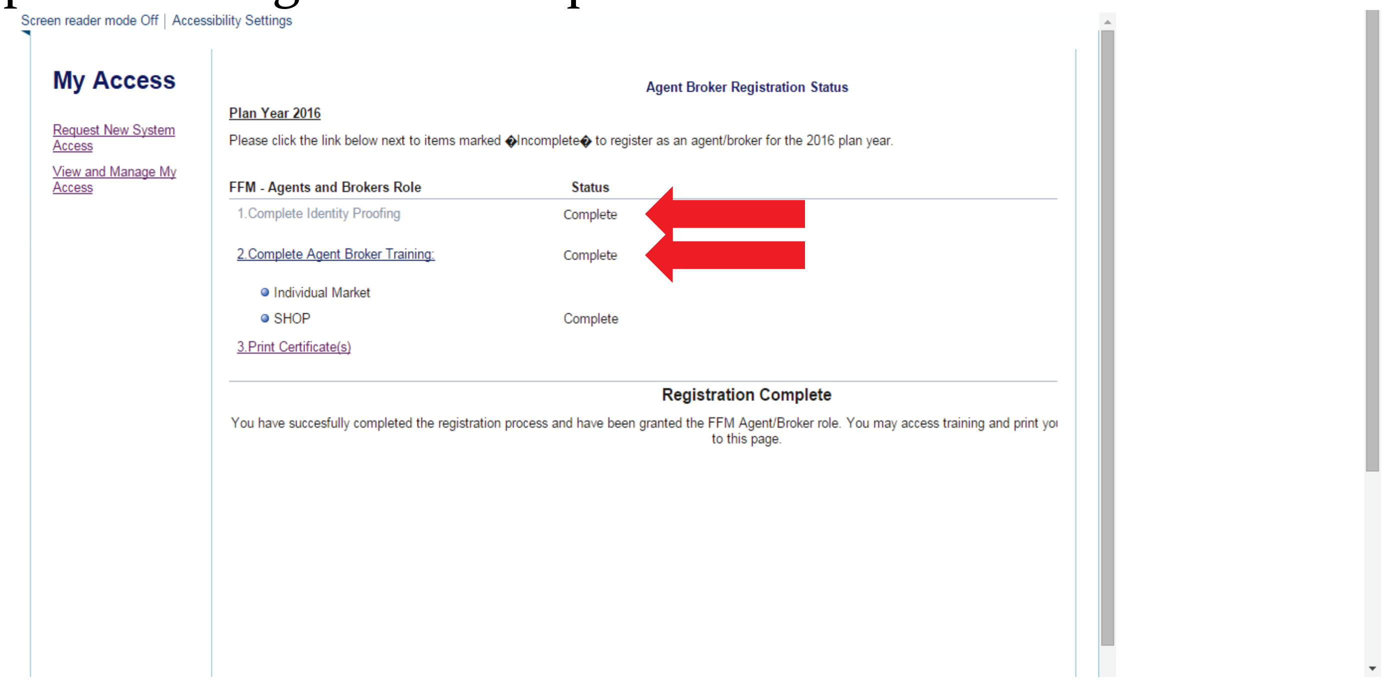
- If the agent/broker chose to take training from one of the CMS-approved vendors, the agent/broker will need to log back to the MLMS via the CMS Enterprise Portal to execute the applicable Agreement(s) once he/she receives a confirmation code from the CMS-approved via email.

Step 6: Agent or Broker Executes the Agent/Broker Agreement(s)

Click "Yes" to the Agreement at the end of the curriculum to confirm you have reviewed and accept the terms of the Marketplace's Agreement.

Step 7: Confirm Completion on the Agent/Broker Registration Status Page

- After Agreements are executed, the agent or broker is redirected back to the Agent Broker Registration Status page on the CMS Enterprise Portal.
- Once the agent or broker is redirected, he or she should review the Agent Broker Registration Status page to confirm he or she has completed all registration requirements.



Step 7: Confirm Completion on the Agent/Broker Registration Status Page

- At this time, if all steps have been completed, you will be able to print your completion certificate(s) if needed.
- Click on "Print Certificates" on the Agent Broker Registration Status page.

CMS Portal > **EIDM Navigator**

My Access

Request New System Access

View and Manage My Access

Agent Broker Registration Status

Plan Year 2016

Please click the link below next to items marked �Incomplete� to register as an agent/broker for the 2016 plan year.

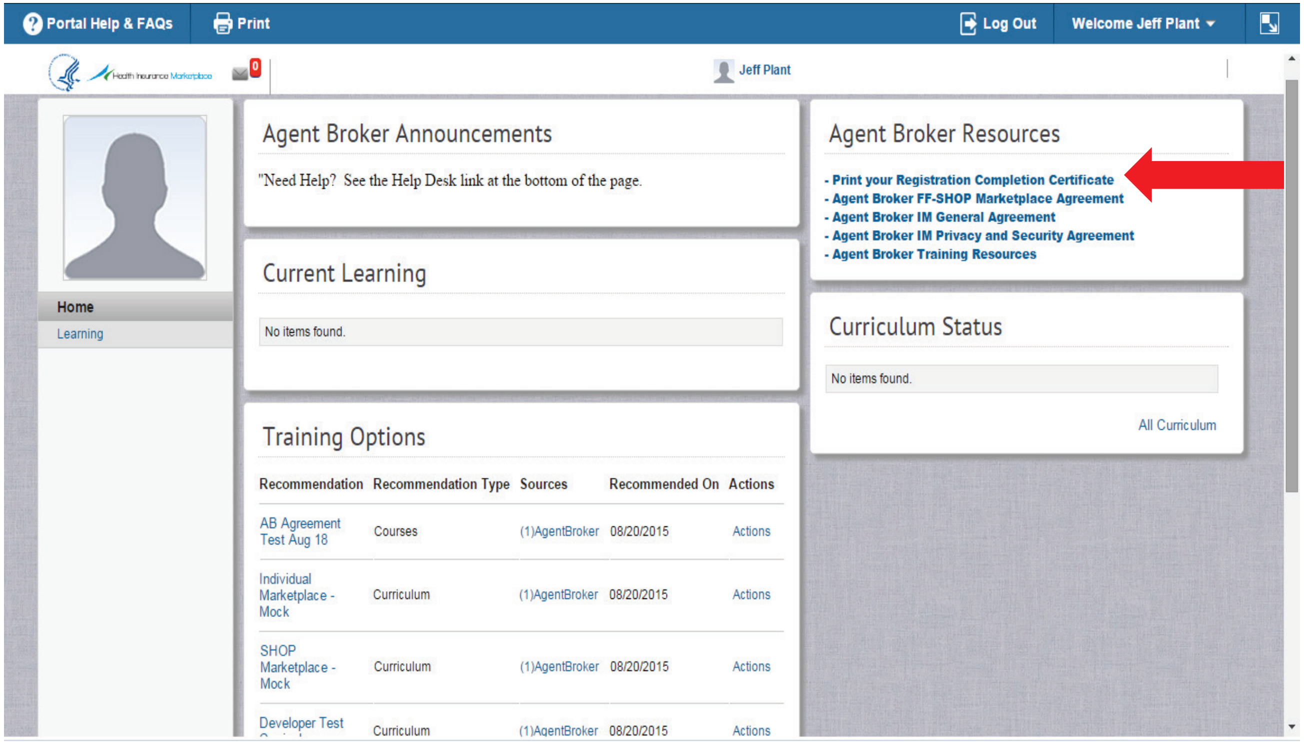
FFM - Agents and Brokers Role	Status
1.Complete Identity Proofing	Complete
2.Complete Agent Broker Training:	Complete
• Individual Market	
• SHOP	Complete
3.Print Certificate(s)	

Registration Complete

You have succesfully completed the registration process and have been granted the FFM Agent/Broker role. You may a to this page.

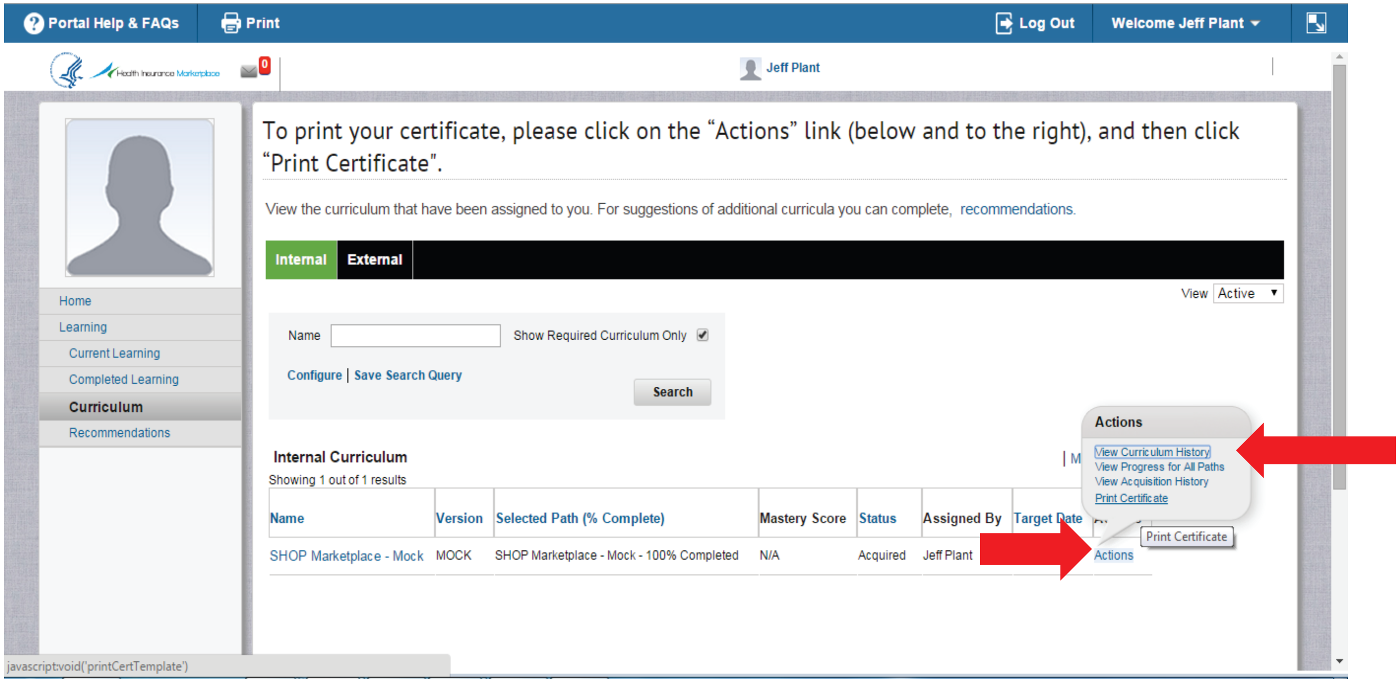
Step 7: Confirm Completion on the Agent/Broker Registration Status Page

Click on the “Print your Registration Completion Certificate” once redirected to the MLMS.



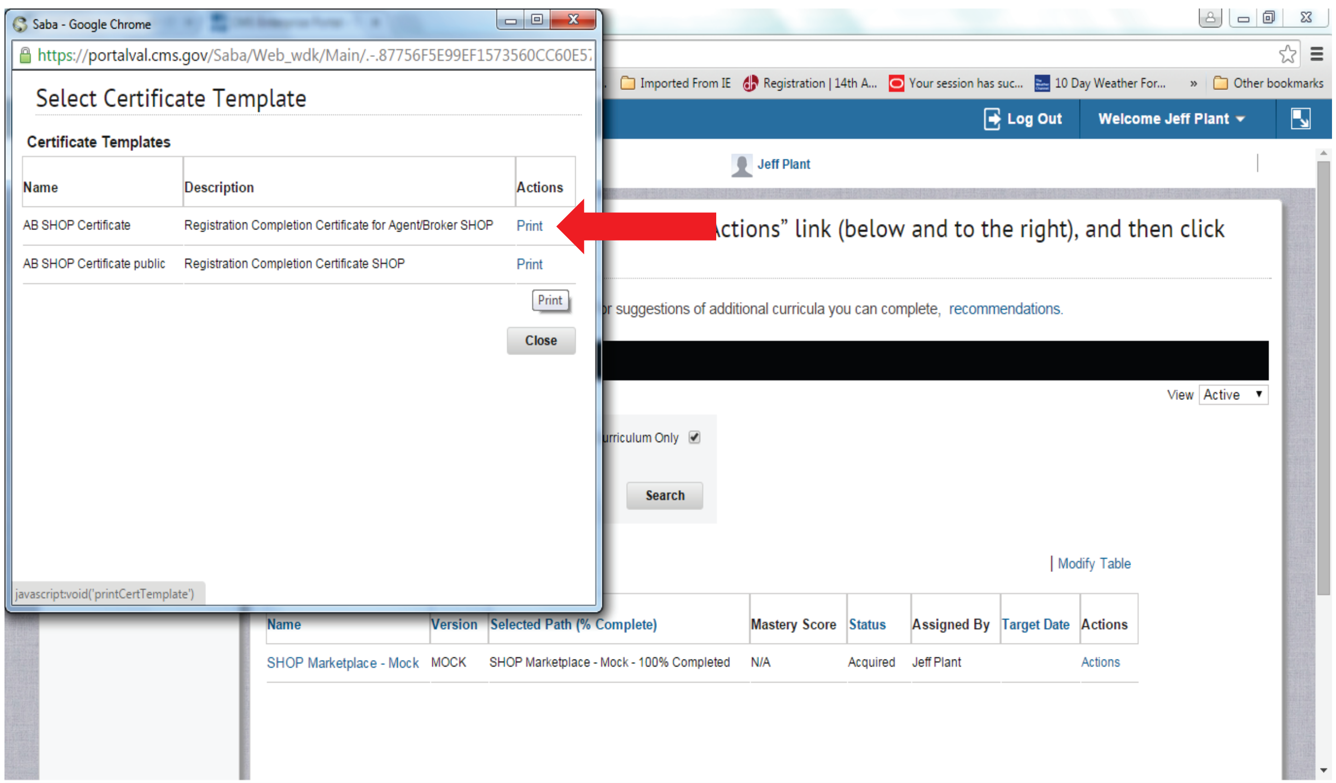
Step 7: Confirm Completion on the Agent/Broker Registration Status Page

Then scroll over "Actions" and click "Print Certificate.



Step 7: Confirm Completion on the Agent/Broker Registration Status Page

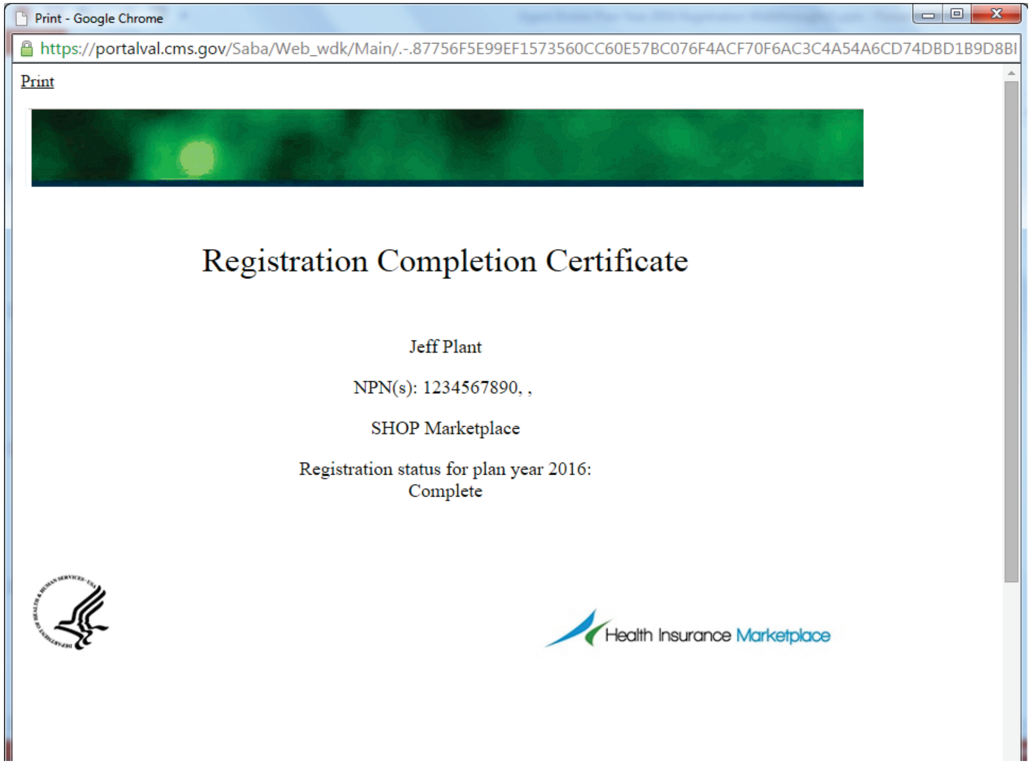
Once a window opens, click on "Print" next to the certificate you want to print.



Step 7: Confirm Completion on the Agent/Broker Registration Status Page

Your completion certificate will include:

- Your Name
- Your NPN(s)
- The market segment(s) for the certificate
- The plan year for the certificate



The issuer(s) with which an agent or broker is affiliated may request to view his or her registration completion certificate(s). However, issuers are instructed to review the Registration Completion list published by CMS to confirm the registration status of agents and brokers.

Summary

The topics presented during this webinar included:

- Small Business Health Options Program (SHOP) Marketplace Overview
- FFM Agent and Broker Registration and Training Overview
- CMS-approved FFM Agent and Broker Vendor Training Option Overview
- FFM Agent and Broker Registration and Training Process Steps

Please note that the content in this presentation is limited to the Federally-facilitated Individual and SHOP Marketplaces.

Upcoming Activities

- Plan year 2016 Open Enrollment begins on November 1, 2015 and ends on January 31, 2016.
- The first date when plan year 2016 coverage can start is January 1, 2016.
- CMS will make the slides from this webinar available on REGTAP and the Resources for Agents and Brokers webpage.
- Additional outreach, including two webinars focusing on Open Enrollment, will continue through the remainder of 2015 on topics relevant to agents and brokers to help prepare for the 2016 Open Enrollment period.

Agent and Broker Resources

- *Additional resources can be found on CMS's Agents and Brokers Resources webpage at* http://www.cms.gov/CCIIO/programs-and-initiatives/health-insurance-marketplaces/a-b-resources.html
- *Additional information agents and brokers can use to educate consumers can be found at* HealthCare.gov
- *For more information about technical assistance training and support, please visit* http://www.regtap.info
- *Information for plan year 2016 CMS-approved vendors can be found at:*
  - *AHIP: https://www.ahipexchangetraining.com/file.php/1/public/About.html*
  - *Gorman Health Group: http://www.exchangebrokertraining.com*
  - *NAHU: for general information visit http://www.nahu.org/education/ffmtraining/index.cfm or for CEU credit information visit https://www.netstudy.com/nahu*

Agent and Broker Resources

- *The CMS Enterprise Portal can be accessed at:* https://portal.cms.gov/.
- *Agent and Broker NPNs can be found at:* www.nipr.com/PacNpnSearch.htm.
- *To access the SHOP Marketplace Agent/Broker Portal to complete searchable profile and manage SHOP accounts visit:* https://healthcare.gov/marketplace/small-businesses/agent
- *For the regulations outlining the CMS-approved vendor training option, review 45 CFR 155.222.*
- *For the regulations outlining CMS's eight privacy principals, review 45 CFR 155.260(a).*
- *The Find Local Help tool can be accessed at* https://localhelp.healthcare.gov/.
- *Current news and updates are distributed via email through GovDelivery and CMS's twitter handle,* @CMSGov.

Questions?

For questions/comments about agent/broker participation in the FFM: FFMProducer-AssisterHelpDesk@cms.hhs.gov

For questions/comments on the MLMS: MLMSHelpDesk@CMS.HHS.gov

For questions/comments about the FFM application and enrollment:
1-800-318-2596 (TTY: 1-855-889-4325) available 7 days a week, 24 hours a day

For questions/comments about the FF-SHOP:
1-800-706-7893 (TTY: 711) available M-F 9:00 AM -7:00 PM ET

For questions/comments about web-broker participation in the FFM:
Webbroker@cms.hhs.gov