Agent and Broker Federally-facilitated Marketplace (FFM) Registration

A Walk Through of Registration Steps

2015 Plan Year Registration

Centers for Medicare & Medicaid Services (CMS)
Center for Consumer Information & Insurance Oversight (CCIIIO)
Purpose: To present the registration process for agents and brokers, including web-brokers, wishing to assist consumers in the Federally-facilitated Marketplace (FFM)*

Audience: This resource will be useful for agents, brokers, and web-brokers who are new to the FFM and are registering for the first time. This document also contains useful tips for agents, brokers, and web-brokers who wish to renew their registration with the FFM.

* The FFM includes the FFM for the individual market and the Federally-facilitated Small Business Health Options Program (FF-SHOP). This registration process also applies to agents and brokers operating in the Marketplaces where the state is performing plan management functions.
FFM Agent and Broker Registration Overview

- Agents and brokers must complete certain registration activities initially and annually in order to participate in the FFM.
- The agent and broker registration process for the FFM is comprised of two parts.

**Part I**

- Training and Agreements on the Medicare Learning Network® (MLN)

**Part II**

- Creation of an FFM User Account and Identity Proofing

**Website:**


**Key Actions:**

- Create an account on the MLN
- Select the agent/broker role for the desired market
- Complete the training curriculum for the desired market, including the applicable FFM Agreement(s)
- Create an FFM user account
- Request the agent/broker role
- Complete identity proofing
Registration Requirements for Agents and Brokers Who are NEW to the FFM

<table>
<thead>
<tr>
<th>Initial FFM Registration Activities</th>
<th>Part I</th>
<th>Part II</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agents and brokers participating in the...</td>
<td>Create an Account on MLN</td>
<td>Complete the FFM Training</td>
</tr>
<tr>
<td>• FFM for the individual market and FF-SHOP</td>
<td>Required</td>
<td>Required: Basics, P&amp;S, IM</td>
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**TRAINING & AGREEMENTS:**
- Basics: Affordable Care Act and Marketplace Basics Course & Exam
- P&S: Privacy and Security Standards Course & Exam – **NEW for Plan Year 2015**
- IM: Individual Marketplace Course & Exam
- SHOP: SHOP Marketplace Course & Exam
- GA: Agent Broker General Agreement for the FFM Individual Market
- P&S IM: Agreement Between Agent or Broker and CMS for the FFM Individual Market
- P&S SHOP: Agreement Between Agents and Brokers and CMS for the FF-SHOP
Registration Requirements for Agents and Brokers Who are RENEWING with the FFM

### Annual FFM Registration Activities

<table>
<thead>
<tr>
<th>Part I</th>
<th>Part II</th>
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</thead>
<tbody>
<tr>
<td>Log in to MLN using existing MLN User ID</td>
<td>Create an FFM User Account and Complete Identity Proofing on the CMS Enterprise Portal</td>
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<tr>
<td>Complete the FFM Training</td>
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<tr>
<td>Execute FFM Agreement(s)</td>
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</table>

**Agents and brokers renewing their participation in the...**

<table>
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<tr>
<th>Requirement</th>
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<tr>
<td><strong>• FFM for the individual market and FF-SHOP</strong></td>
<td>Required</td>
<td>No activity required</td>
</tr>
<tr>
<td></td>
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<td>Required: GA, P&amp;S IM, P&amp;S SHOP</td>
</tr>
<tr>
<td></td>
<td>Recommended: SHOP</td>
<td></td>
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</tr>
<tr>
<td><strong>• FF-SHOP</strong></td>
<td>Required</td>
<td>Required (Note: Agents and brokers who did not complete this requirement as part of the registration for the 2014 plan year must do so as part of registration for the 2015 plan year.)</td>
</tr>
<tr>
<td></td>
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Agent and Broker Federally-facilitated Marketplace (FFM) Registration

Part I: Training and Agreements on MLN
Step 1: Create MLN Account/Log In on the MLN

You will begin on the login page for the MLN Learning Management System available at: https://Marketplace.MedicareLearningNetworkLMS.com

New agents and brokers must create an account on MLN.

Renewing agents and brokers log in using their existing MLN user ID. (Do not create a new account on MLN if you already have an existing MLN account! If you create a second MLN account, you may have to re-complete part of registration later.)

Agents and brokers may retrieve their MLN user ID or their password by selecting one of the corresponding links.
Step 2: Create a New Account

Enter your identifying information to create an account.

Remember your Login ID, which is also referred to as your MLN user ID, because it will be used later in the registration process.
Part I

Step 2a: Select User Type/User Role

- For User Type/User Role, select one of the three agent/broker user type/user roles, based on the market you wish to serve (i.e. Individual Market and SHOP, Individual Market Only, or SHOP only).
- You may select a role in English or Spanish. (The Spanish curriculums will be available in August 2014.)
Step 2b: Enter NPN

- Your NPN can be up to 10 digits long and does not include leading zeroes.
- It is vital that you enter your NPN correctly in your MLN profile, before you complete a curriculum.
- If you enter the wrong NPN and wish to correct it after you have completed a curriculum, you may have to re-complete the curriculum!
- Your NPN will be recorded on your training curriculum completion certificate and may be used by issuers for compensation purposes.
- You may locate your NPN at: https://pdb.nipr.com/html/PacNpnSearch.html
Step 2c: Select Organization

• After entering your NPN, you must make a selection in the “Organization” field.
• For the “Organization” field, choose the blue text that says “Select.” A new screen will pop up.
• This should not be confused with the field labeled “Organization Type” which is automatically grayed-out; agents and brokers do not need to complete this field.
Select the gray “Search” button, and “Marketplace” will appear as the only option. Choose the radio button next to “Marketplace.” Select “Save” to finish creating an MLN account.
Step 2d: Select Create Account

Once you have completed all of the fields, select “Create” to finish creating your account.
Step 3: Select “Training Home” on the Welcome Page

After you have successfully created your account, you will be taken to a “Welcome” page. Select “Training Home.”
Step 4: Select your Curriculum to View the Courses

Your curriculum displays under “My Upcoming Learning.” Select your curriculum to view the courses.

The curriculum may take up to 15 minutes to be auto-assigned.
Step 5a: Select the Title of the First Curriculum Item

Select the title of the first item listed. The title of the first course or Agreement will be highlighted in blue. You will be able to scroll to view the full curriculum (courses, exams, and Agreements).
Step 5b: Enroll in a Course

Select “Enroll” to enroll in the course.
Step 5c: Confirm Enrollment Information

Select “Enroll” to confirm your enrollment in the course.

You may keep the defaults for “Course Credit Options” and “Course Mode Options.” (CMS does not currently offer CEU credit for this training.)
Step 5d: Launch the Course

Choose “Open Item” to launch the course.
Proceed with taking the course.
Tip: Menu Displays Within Courses

• The menu page displays the topics in each course.

• After completing each topic in a course, you will return to the menu page.
Step 7: Obtain Curriculum Certificate

- After you complete all required courses, exams, and Agreements within the curriculum, you will receive a curriculum completion certificate.
- To provide proof of completion, be sure to print the curriculum certificate—not the course certificate.
Tip: Viewing and Printing Certificates

You may view or print your curriculum certificate at any time by accessing the “Transcript” tab.
Tip: Training Display and Completion Status

From “Training Home,” you can view the status of your courses, exams, and Agreements.
Tip: Bookmarking

Training may be completed in multiple sessions. From “Training Home” you may revisit a course or Agreement, and resume where you left off previously.
Agents and brokers can change or edit their user type/user role, NPN, and other MLN profile information by accessing “My Account.”

- Locate your name at the top right corner of the MLN screen.
- Place your cursor over your name, and a drop-down list will appear. Select “My Account.”
- But, remember—it is vital that you enter your NPN correctly in your MLN profile BEFORE you complete a curriculum.
• Select “Edit” under “User Information” on the left side of the page.
• Update the information that you wish to change. Click “Save.”
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Part II: Role Selection and Identity Proofing
Tip: Processing Time Between Parts I & II

- If you are completing Part I of the registration process, you must wait two business days before completing Part II of the registration process. This allows time for your training completion record to be transmitted from the MLN to the CMS Enterprise Portal.

- Remember, you only need to complete Part II if you did NOT do so as part of 2014 plan year registration!
Step 1: Register on CMS Enterprise Portal


Agents and brokers who completed Part II of registration for the 2014 plan year do not need to log into the CMS Enterprise Portal again unless they need to reset their FFM account password or conduct other FFM account maintenance, such as editing their e-mail address.
Step 2: Read and Agree to the Terms and Conditions

Read the terms and conditions, then check the box next to “I agree to the terms and conditions.” Click “Next.”
Step 3: Enter Basic Identifying Information

- Enter basic identifying information on the “Your Information” page.
- Note that Social Security Number is not required. Click “Next.”
Create your FFM user account (i.e., FFM user ID and password). Respond to the challenge questions and click “Next.”
Step 5: Account Creation Complete

The screen will display “Registration Complete.” Click “OK” and the system will redirect you back to the CMS Enterprise Portal page, where you will log back in with your new FFM user ID and password.
Step 6: Log In to CMS Secure Portal

Select “Login to CMS Secure Portal.”
Step 7: Enter FFM User ID and Password

Enter the FFM user ID and password you created in Step 4. Select “Log In.”
Step 8: Request Access

Step 9: Request New System Access

Step 10: Select FFM Application

Next to “System Description,” select “FFM - FFM System.”
Step 11: Select FFM Agent Broker Role

Under “Role,” select “FFM Agent Broker.”
Step 12: Enter NPN and MLN User ID

Enter your NPN and the MLN user ID you created in Part I of registration. When finished, click “Submit.”

- You must enter both your MLN user ID and NPN exactly as they appeared on MLN at the time you completed your curriculum.
- If you do not enter your NPN or MLN user ID correctly, the system will not be able to confirm the completion of your curriculum.
You will be returned to the “My Access” page. Read the explanation under “Remote Identity Proofing” and click “Next.”
Step 14: Agree to Terms and Conditions

You will be returned to the “My Access” page. Read the Terms and Conditions. Click “I agree to the terms and conditions,” and then select “Next.”

![Image of the Terms and Conditions page showing the checkbox for agreeing to the terms and conditions and the option to proceed]
Step 15: Enter Your Identifying Information

You will be prompted to enter your identifying information. This information will be used to create the identity proofing questions. Click “Next” when you have finished.
Part II

Step 16: Answer Security Questions

Answer the security questions to verify your identity.

![Image of security questions interface]

- My Access
- Request New System Access
- View and Manage My Access

Verify Identity

I was born within a year or on the year of the date below:
- 1960
- 1993
- 1966
- 1999
- NONE OF THE ABOVE

According to our records, you previously lived on (PHILIPS). Please choose the city from the following list where this street is located:
- NEWBURN
- NEW BERN
- MIDWAY PARK
- KINSTON
- NONE OF THE ABOVE

Which of the following is a current or previous employer? If there is not a matched employer name, please select ‘NONE OF THE ABOVE’.
- ORGANIC PRODUCTS
- SAFeway
- CODA ACQUISITION GROUP
- JOSÉ GUERRERO
- NONE OF THE ABOVE

Which of the following is a previous phone number of yours? If there is not a matched phone number, please select ‘NONE OF THE ABOVE’:
- (202)221-7003
- (202)212-8360
- (202)214-4270
- (202)233-3271
- NONE OF THE ABOVE

[Buttons: Cancel, Next]
Step 17: Notification of Successful Completion

Once you have completed the questions, your FFM user ID will be activated for the FFM Agent Broker role. When you see this “Successful Completion!” notification, you have completed Part II.
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Resources
Resources

Resources for Agents and Brokers in the Health Insurance Marketplaces:  
http://www.cms.gov/cciio/programs-and-initiatives/health-insurance-marketplaces/a-b-resources.html

- Frequently Asked Questions Regarding Agents and Brokers:  

- Registering to Participate in the Federally-facilitated Marketplace for the 2015 Plan Year: What Agents and Brokers Need to Know:  

- Operational Tips for Completing Agent and Broker Registration for the Federally-facilitated Marketplace:  

- Quick Reference Guide: Agent and Broker Training and Registration Process for the FFM:  

- Federally-facilitated Marketplace Agent and Broker Registration For the 2015 Plan Year: Frequently Asked Questions:  