



Guide to Plan Year 2018 Marketplace Registration and Training for New Agents and Brokers

This resource is an overview of the plan year 2018 Health Insurance Marketplace registration and training process for “new” agents and brokers who did not complete plan year 2017 registration and training and are required to take the full Individual Marketplace training for plan year 2018.

1

Create an Account on the Centers for Medicare & Medicaid Services (CMS) Enterprise Portal

- Navigate to the [CMS Enterprise Portal](#) and select **New User Registration**.
- Complete the steps as prompted to create an account.



Note: Please ensure both your first and last name is spelled correctly. If there is a spelling error in either, you can correct it during remote identity proofing.

- You will receive an email at the address you listed in your account, notifying you of your successful account creation.



Note: If you already have a CMS Enterprise Portal account, you should **not** create a new one. Click [here](#) for more information.

2

Request the Federally-facilitated Marketplace (FFM) Agent/Broker Role

- Log in to the [CMS Enterprise Portal](#) and select **Request Access Now** for **FFM/Training – Agents/Brokers/Assisters**.
- Request the **Agents and Brokers** role from the dropdown menu.

3

Complete Remote Identity Proofing

- After requesting the Agents and Brokers role, you will be prompted to complete identity proofing.
- Enter and confirm your information and answer identity verification questions. You will then be asked to log out and log back into the [CMS Enterprise Portal](#).
- If your information cannot be verified electronically, the CMS Enterprise Portal will provide you a phone number and code to confirm your identity directly with Experian, CMS’ identity proofing vendor.



Note: If you have completed identity proofing in the past, you will not need to complete it again.

4

Complete Marketplace Learning Management System (MLMS) Profile

- Log in to the [CMS Enterprise Portal](#) and select **Complete Agent Broker Training**.
- Select the **Access Training** link next to the MLMS training option, which is the fourth option listed.
- Select one of four user roles: 1) Only an Individual Marketplace Agent Broker; 2) Only a Small Business Health Options Program (SHOP) Marketplace Agent Broker; 3) Both an Individual and SHOP Marketplace Agent Broker; or 4) Not an Agent Broker.
- Enter all applicable information in your MLMS Profile. The profile fields will be customized based on the role you selected.
- Select **Save/Update** then **Next** to complete your profile.



Note: If applicable to your role, make sure that you enter your National Producer Number (NPN) correctly. Entering an inaccurate NPN may result in denial of compensation or credit by issuers.

5

Complete Training through the MLMS or a CMS-Approved Vendor

- On the [CMS Enterprise Portal](#), select **Complete Agent Broker Training**.
- Review the MLMS and CMS-approved vendor training options.
 - Three vendors are approved to offer training for plan year 2018: America’s Health Insurance Plans (AHIP), the National Association of Health Underwriters (NAHU), and Litmos by CallidusCloud.
 - If you choose to complete training through a CMS-approved vendor, CMS recommends you do so prior to completing your MLMS profile.
- Select the **Access Training** link beside the training option you plan to complete and follow the prompts to enroll in and complete the training curriculum of your choice – either for the Individual Marketplace, SHOP, or both.



Note: If you complete training with a CMS-approved vendor, you must return to the MLMS to execute applicable Agreements. This step is **required** to complete your Marketplace registration for plan year 2018.

6

Execute the Applicable Agreement(s) on the MLMS

- Once you have updated your MLMS profile and completed training through either the MLMS or a CMS-approved vendor, you must launch, read, and select **I Agree** for all applicable Agreement(s).

7

Confirm Registration Status and Print Certificate

- After executing the Agreement(s), you will be redirected to the “Agent Broker Registration Status” page on the CMS Enterprise Portal. Review this page to confirm you have completed all registration steps.
- If you have completed all steps, select **Print Certificate(s)** on the “Agent Broker Registration Status” page.
- Confirm that your information appears on the [Agent and Broker FFM Registration Completion List](#). Your information may take one to two business days to appear.

Looking for additional guidance? Check out the “Plan Year 2018 Health Insurance Marketplace Registration and Training for New Agents and Brokers” [webinar slides](#) for more information or [contact one of our Agent and Broker Help Desks](#) for assistance.