Plan Year 2018 Health Insurance Marketplace Registration and Training for New Agents and Brokers

July 2017

Centers for Medicare & Medicaid Services (CMS)
Center for Consumer Information & Insurance Oversight (CCIIO)

Intended Audience

- The intended audience for this webinar includes:
  1) Agents and brokers joining the Marketplace for the first time for plan year 2018 and,
  2) Agents and brokers who participated in a previous plan year, but did NOT complete plan year 2017 Marketplace registration and training.
- "Returning" agents and brokers successfully completed registration and training for plan year 2017 and are eligible for Refresher Training for plan year 2018.*
- "New" agents and brokers did not complete registration and training for plan year 2017 and are required to complete the full Individual Marketplace training for plan year 2018.
- Please be advised that this is not an open press call. Members of the press or a media outlet should disconnect the call at this time and contact the Centers for Medicare & Medicaid Services (CMS) Press Office for further information.

Disclaimer

The information provided in this presentation is intended only as 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.

This document generally is not intended for use in the State-based Marketplaces (SBMs), but some of the material in it might be relevant if you are in a state with an SBM that is using HealthCare.gov for eligibility and enrollment. Please review the guidance on our Agents and Brokers Resources webpage (http://go.cms.gov/CCIIOAB) and Marketplace.CMS.gov to learn more.

Unless indicated otherwise, the general references to "Marketplace" in the presentation only includes Federally-facilitated Marketplaces (FFMs) and State-based Marketplaces on the Federal Platform (SBM-FPs).

Webinar Agenda

- Welcome
- Small Business Health Options Program (SHOP)
- Marketplace Registration and Training
- Help Desk and Call Center Support
- Agent and Broker Resources
- Q&A Session
- Closing Remarks

Welcome to Agents and Brokers for Plan Year 2018!

Thank you for your interest in the Marketplace for plan year 2018*!

- To the extent permitted by states, licensed agents and brokers assist consumers in applying for qualified health plans (QHPs) and insurance affordability programs, including premium tax credits and cost-sharing reductions.
- Agents and brokers also play a crucial role in educating consumers about the Health Insurance Marketplaces, both during the annual Open Enrollment period and throughout the plan year.

Prior to assisting consumers, you should:

- Understand the standards under 45 CFR 155.220, which authorize agents and brokers to assist consumers with selecting and enrolling in QHPs offered through the Marketplaces.
- Be familiar with 45 CFR 155.260, which outlines the limits on how agents and brokers may use any information gained as part of providing assistance to a qualified individual.

To better understand the standards under CFR 155.220 and 155.260, review the guidance on CMS' Agents and Brokers Resources webpage at http://go.cms.gov/CCIIOAB.

** 45 CFR § 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.*

Session Guidelines

- This is a 90-minute webinar session.
- Throughout the webinar, you may submit questions via the web chat box and we will address as many as we can during the question and answer (Q&A) session at the end of the presentation.
- For questions regarding webinar content or logistics, contact the REGTAP Registrar at registrar@regtap.info or by phone at (800) 257-9520.

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Plan Year 2018 Health Insurance Marketplace Registration and Training for Returning Agents and Brokers

Small Business Health Options Program (SHOP)

SHOP Registration

To register to participate in SHOP, agents and brokers:

- **Must** create an account and complete identity proofing through the CMS Enterprise Portal.
- **Must** execute the SHOP Privacy and Security Agreement in the Marketplace Learning Management System (MLMS).
- **May** complete the SHOP training and exam.
  - It is recommended that agents and brokers complete SHOP training, but not required.

Note: To access the SHOP Marketplace Agent/Broker Portal and assist clients with their SHOP application and enrollment, visit: https://healthcare.gov/marketplace/small-businesses/agent.

Proposed Changes to SHOP for Plan Year 2018

- On May 15, 2017 CMS announced an intention to propose, in future rulemaking, a change in the way small businesses enroll in insurance coverage through the Federally-facilitated SHOP (FF-SHOP).
- Under the proposed approach, small employers looking for SHOP coverage would no longer enroll in SHOP coverage through HealthCare.gov beginning for plan years on or after January 1, 2018.
- Employers would enroll directly through SHOP registered agents and brokers or through issuers instead.
- Agents and brokers will still need to sign the annual Privacy and Security Agreement to assist small employers with applying and enrolling in SHOP coverage.
  - Agents and brokers who sign the Privacy and Security Agreement will be searchable by small employers on Find Local Help on HealthCare.gov.

Enrolling Clients Under Proposed Enrollment Approach

- Under the proposed changes to the FF-SHOP enrollment process, SHOP registered agents and brokers could help their small business clients find a SHOP plan in their area using the See Plans and Prices Tool on HealthCare.gov.
- SHOP registered agents and brokers would then help their clients enroll in an FF-SHOP plan directly through an FF-SHOP issuer.
- Employers will need to complete a simple eligibility determination from the FF-SHOP through HealthCare.gov.
- Employers completing an eligibility determination on HealthCare.gov who enroll in a SHOP plan will still have access to the Small Business Health Care Tax Credit, if eligible.

What is New for SHOP in 2018?

Employee Choice by Insurance Company: While employers in all states are able to offer their employees a choice of a single health and/or dental plan or all health and/or dental plans at a single metal level of coverage, employers in the states listed below will also be able to offer their employees a choice of health and/or dental plans by insurance company. This allows employers to offer coverage options at different metal levels to their employees from a single insurance company.

Vertical Choice States		
Alaska	Mississippi	Pennsylvania
Delaware	Missouri	South Carolina
Florida	Montana	South Dakota
Georgia	Nebraska	Tennessee
Illinois	Nevada	Texas
Indiana	New Hampshire	Utah
Iowa	North Carolina	Virginia
Kansas	North Dakota	West Virginia
Louisiana	Ohio	Wisconsin
Maine	Oklahoma	Wyoming

Note: Vertical Choice is not available in: Alabama, Arizona, Kentucky, Michigan, New Jersey

SHOP Tools at HealthCare.gov

Tool	Functionality & Value
See Plans and Prices	Help clients browse SHOP health and dental plans available in their area. Premium estimates are based on age and geographic location.
Full Time Equivalent (FTE) Calculator	Help clients determine if they may be eligible for SHOP coverage by counting their total number of full-time and FTE employees.
Tax Credit Estimator	Help employers estimate if they may be eligible for the Small Business Health Care Tax Credit, and estimate how much the tax credit may be worth to them.
Minimum Participation Rate (MPR) Calculator	Help employers predict if they will meet the MPR required to enroll in SHOP.

SHOP Resources

- Learn more about SHOP and use tools to help your clients enroll in SHOP coverage at www.HealthCare.gov/small-businesses/.
- Find SHOP resources, fact sheets, and user guides at https://Marketplace.CMS.gov.
- Learn more about the potential proposed changes coming to the SHOP at https://www.cms.gov/CCIIO/Resources/Regulations-and-Guidance/Downloads/The-Future-of-the-SHOP-CMS-Intends-to-Allow-Small-Businesses-in-SHOPs-Using-HealthCaregov-More-Flexibility-when-Enrolling-in-Healthcare-Coverage.pdf.
- See the listing of states offering employee choice by insurance company in 2018 by visiting https://www.cms.gov/CCIIO/Programs-and-Initiatives/Health-Insurance-Marketplaces/2017-Implementation-of-Vertical-Choice.html.

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Plan Year 2018 Health Insurance Marketplace Registration and Training for New Agents and Brokers

Marketplace Registration and Training

Registration and Training

If you wish to participate in the Marketplace for plan year 2018, you must complete the following actions:

1. Create a CMS Enterprise Portal account.
2. Request the FFM Agent/Broker role.
3. Complete remote identity proofing through the Enterprise Identity Management (EIDM) System.
4. Complete your agent/broker profile on the MLMS via the CMS Enterprise Portal.
5. Complete Marketplace training and pass the associated exams (i.e., Individual Marketplace and/or SHOP) on the MLMS or through a CMS-approved vendor via the CMS Enterprise Portal.
6. Read and accept the applicable Marketplace Agreement(s) on the MLMS.
7. Confirm completion of all registration steps by logging back in to the "Agent/Broker Registration Status" page on the CMS Enterprise Portal.

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

- If you do not already have a CMS Enterprise Portal account,* navigate to https://portal.cms.gov, and select the "New User Registration" link.

- After reading and agreeing to the terms and conditions, select the check box next to "I Agree to the Terms and Conditions" and then select "Next."

If you already have a CMS Enterprise Portal account, you should not create a new one. You should select "Login to CMS Secure Portal" and proceed to Step 2. If you are unsure if you already have an FFM User ID and password, see the "Avoiding the Creation of a Duplicate CMS Enterprise Portal Account" resource available here on the Agents and Brokers Resources webpage.

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

- Enter the requested information under "Your Information" and select "Next."
- Create an FFM User ID and password.
- Choose challenge questions and provide answers, then select "Next."
- The CMS Enterprise Portal will notify you that the account was created. Then, select "OK."
- You will receive an email at the address you listed in your account, notifying you that your account was successfully created.

Remember! You must log in to the CMS Enterprise Portal and change your password every 180 days to maintain system access.

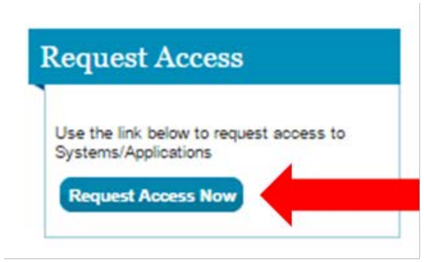
Step 2: Agent or Broker Requests the FFM Agent/Broker Role

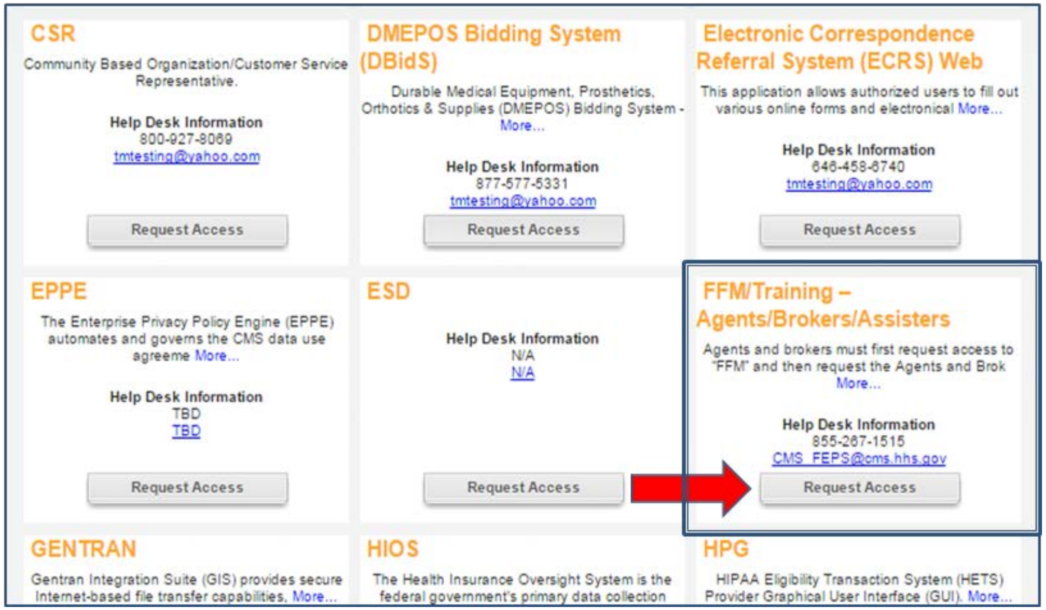
- Once you receive your account creation notification via email, or after waiting a few minutes for the system to update, log back in to the CMS Enterprise Portal by selecting "Login to CMS Secure Portal" at https://portal.cms.gov.
- Read the terms and conditions and accept them by selecting "I Accept."
- Enter your FFM User ID and the password you created when setting up your CMS Enterprise Portal account in Step 1.
- Then select "Log In."

Note: Even if you participated in the Marketplace for plan year 2014, 2015, or 2016, you will need to request the FFM Agent/Broker role when you log in your CMS Enterprise Portal account if you did not complete registration for plan year 2017.

Step 2: Agent or Broker Requests the FFM Agent/Broker Role (continued)

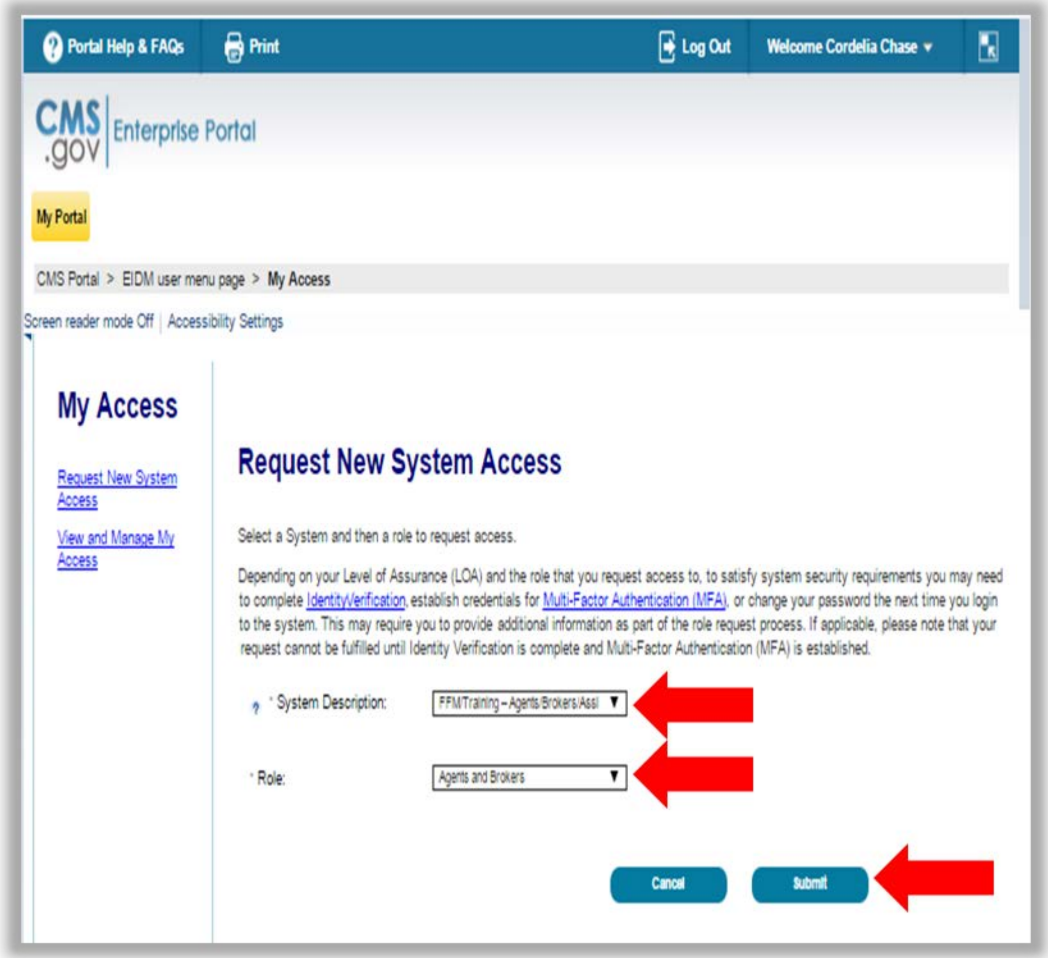
- Select "Request Access Now."
- Scroll down the list of roles, or enter "F" in the search box at the top, to find the "FFM/Training – Agents/Brokers/Assisters" role.
- Then select "Request Access."





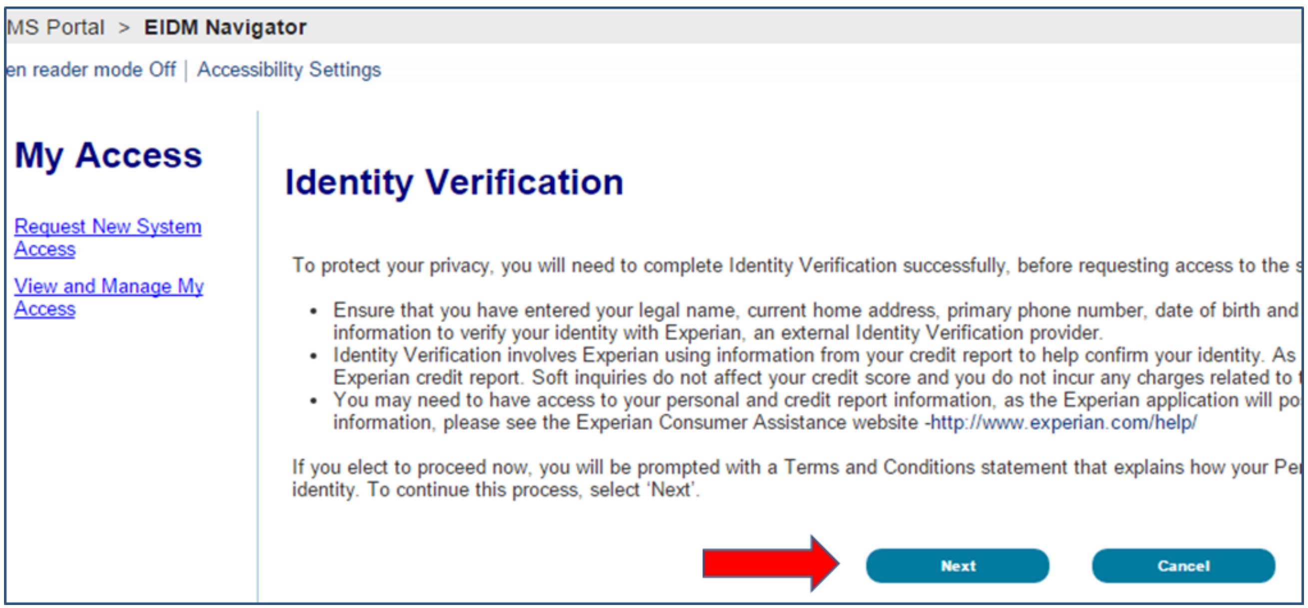
Step 2: Agent or Broker Requests the FFM Agent/Broker Role (continued)

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



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

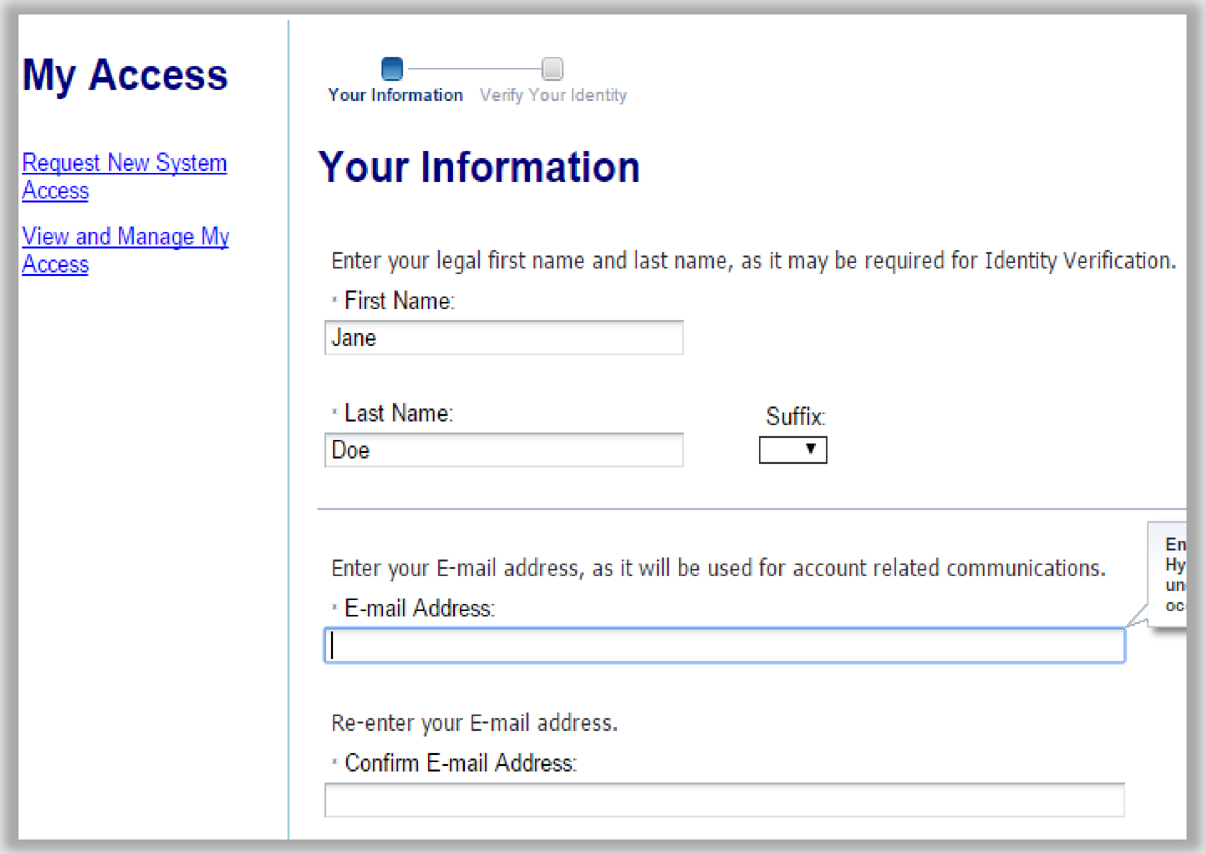
- After selecting “Submit,” new Portal account users will be prompted to complete identity proofing. Read the instructions and then select “Next.”



- Read the terms and conditions and accept them by selecting the check box next to “I agree to the terms and conditions.” Then, select “Next.”

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

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



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

Provide valid answers for the “Out-of-Wallet” questions and select “Next.”

CMS Portal > EIDM user menu page > **My Access**

Screen reader mode Off | Accessibility Settings

My Access

Request New System Access

View and Manage My Access

Your Information | **Verify Your Identity**

Verify Identity

You may have opened a mortgage loan in or around December 2005. 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'.

- FLEET MORTGAGE
- FANNIE MAE
- MORTGAGE SERVICE CENTE
- EASTERN MORT
- NONE OF THE ABOVE/DOES NOT APPLY

You may have opened an auto loan in or around March 2014. Please select the lender for this account. If you do not have such an auto loan, select 'NONE OF THE ABOVE/DOES NOT APPLY'.

- TOYOTA MOTOR CRED
- AUTOMOTIVE FINANCE
- CHASE
- WELLS FARGO BANK
- NONE OF THE ABOVE/DOES NOT APPLY

According to our records, you previously lived on (PRISM). Please choose the city from the following list where this street is located.

- ANDREWS AIR FORCE BASE
- LUSBY
- CALIFORNIA
- BOWIE
- NONE OF THE ABOVE

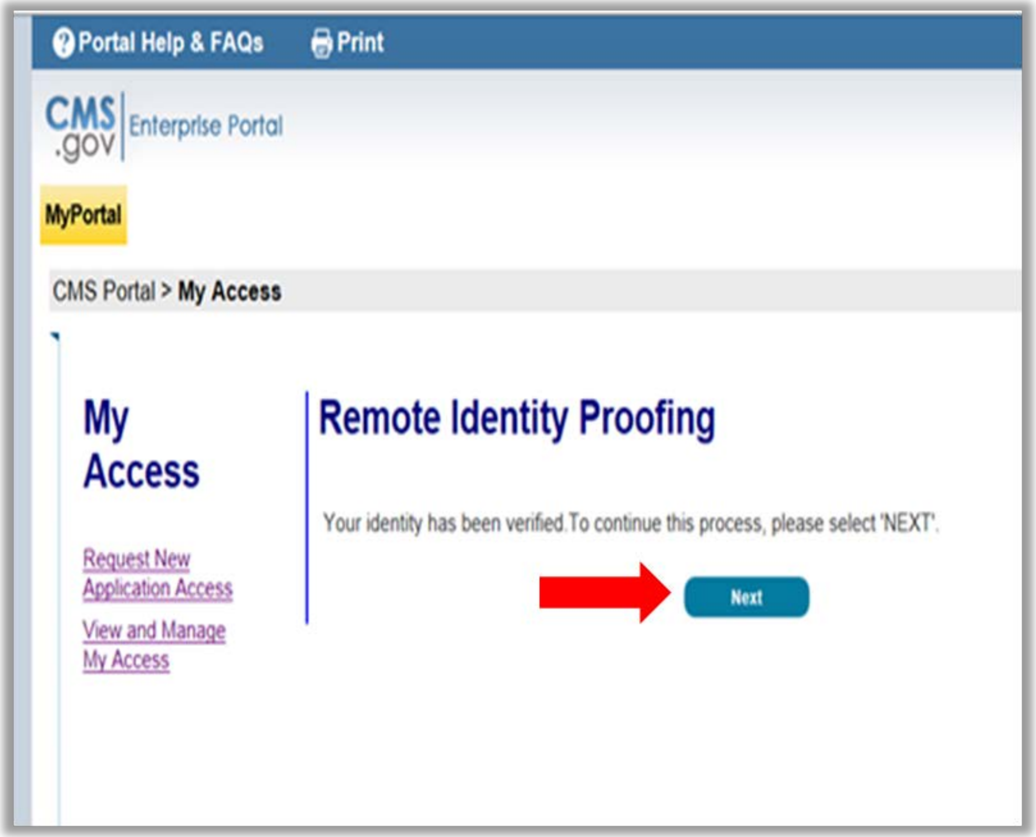
Which of the following is a previous phone number of yours? If there is not a matched phone number, please select 'NONE OF THE ABOVE'.

- (443)225-6514
- (443)229-2872
- (443)206-2783
- (443)210-3183
- NONE OF THE ABOVE

Cancel | Next

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

- After you receive confirmation that your identity has been verified, select "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, which is CMS' identity proofing vendor.
- You will then receive a logout message. Select "OK," and you will be logged out and redirected to the CMS Enterprise Portal home page.



Step 4: Agent or Broker Completes MLMS Profile

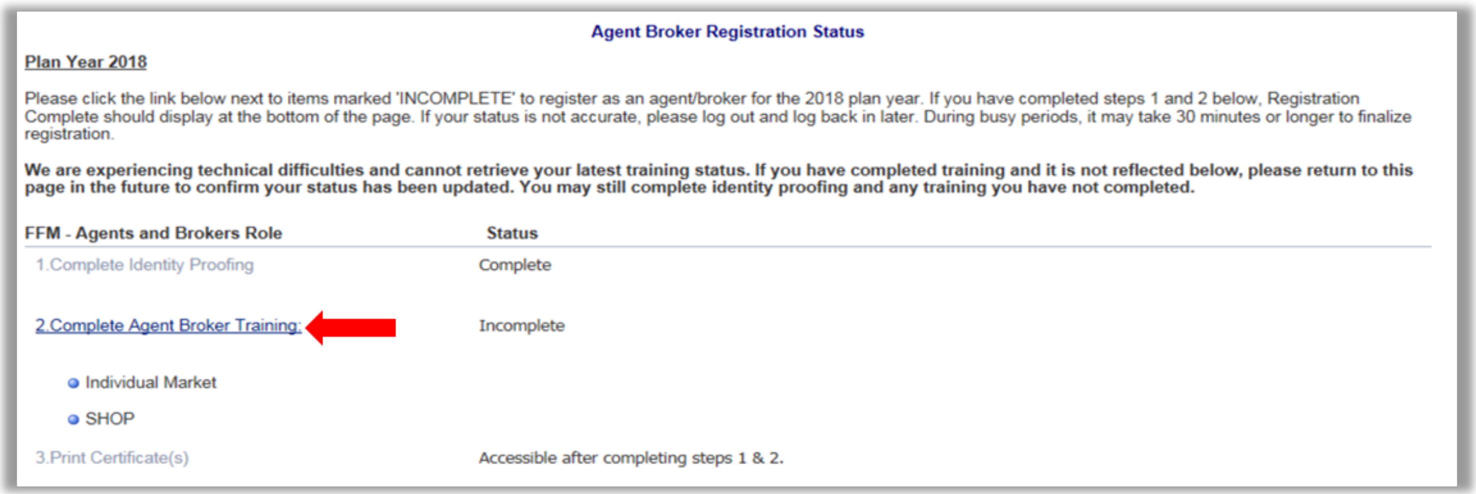
After completing identity proofing, you have the option to complete training either through the MLMS or a CMS-approved vendor.

- If you choose to complete training through a CMS-approved vendor, CMS recommends you do so prior to completing your MLMS profile.*
- If you chose to complete training through the MLMS, you will need to create your MLMS profile prior to completing training.
- For either training, you will need to execute (i.e., sign) the Agreement(s) after you have completed training.

**Additional details about the CMS-approved vendor training will be reviewed during Step 5b.*

Step 4: Agent or Broker Completes MLMS Profile (continued)

- To complete your MLMS profile and access both the CMS-developed training and training offered through CMS-approved vendors, log back in to the CMS Enterprise Portal using the FFM User ID and password you created in Step 1.
- After you are directed to the "Agent/Broker Registration Status" page, select the "Complete Agent Broker Training" link.



Agent Broker Registration Status

Plan Year 2018

Please click the link below next to items marked 'INCOMPLETE' to register as an agent/broker for the 2018 plan year. If you have completed steps 1 and 2 below, Registration Complete should display at the bottom of the page. If your status is not accurate, please log out and log back in later. During busy periods, it may take 30 minutes or longer to finalize registration.

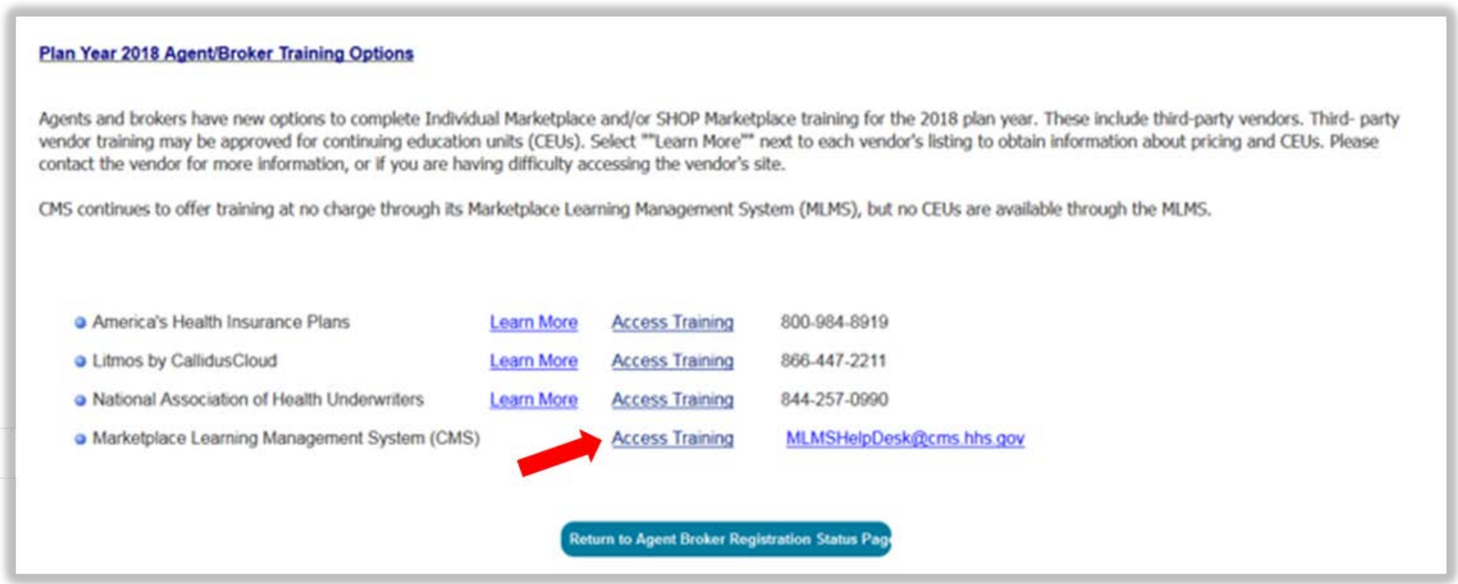
We are experiencing technical difficulties and cannot retrieve your latest training status. If you have completed training and it is not reflected below, please return to this page in the future to confirm your status has been updated. You may still complete identity proofing and any training you have not completed.

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

- You may also navigate to your MLMS profile from the "MLMS Landing Page" using the "My Profile" hyperlink.

Step 4: Agent or Broker Completes MLMS Profile (continued)

- To access your MLMS profile and CMS-developed training, select the "Access Training" link next to the "Marketplace Learning Management System (CMS)" option on the "Agent/Broker Training Options" page.
- This is also the page where agents and brokers may access training via CMS-approved vendors.



Plan Year 2018 Agent/Broker Training Options

Agents and brokers have new options to complete Individual Marketplace and/or SHOP Marketplace training for the 2018 plan year. These include third-party vendors. Third- party vendor training may be approved for continuing education units (CEUs). Select ""Learn More"" next to each vendor's listing to obtain information about pricing and CEUs. Please contact the vendor for more information, or if you are having difficulty accessing the vendor's site.

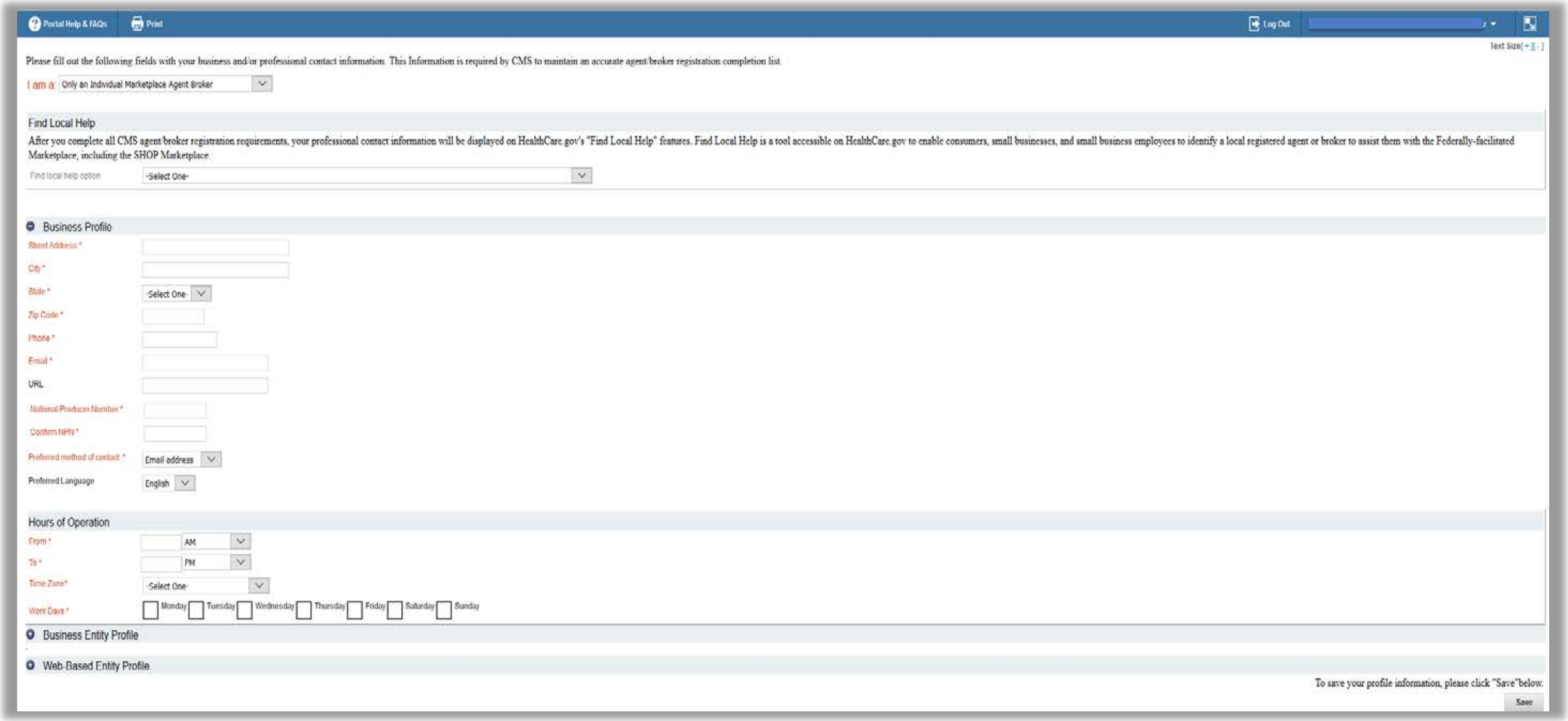
CMS continues to offer training at no charge through its Marketplace Learning Management System (MLMS), but no CEUs are available through the MLMS.

America's Health Insurance Plans	Learn More	Access Training	800-984-8919
Litmos by CallidusCloud	Learn More	Access Training	866-447-2211
National Association of Health Underwriters	Learn More	Access Training	844-257-0990
Marketplace Learning Management System (CMS)		Access Training	MLMSHelpDesk@cms.hhs.gov

Return to Agent Broker Registration Status Pag

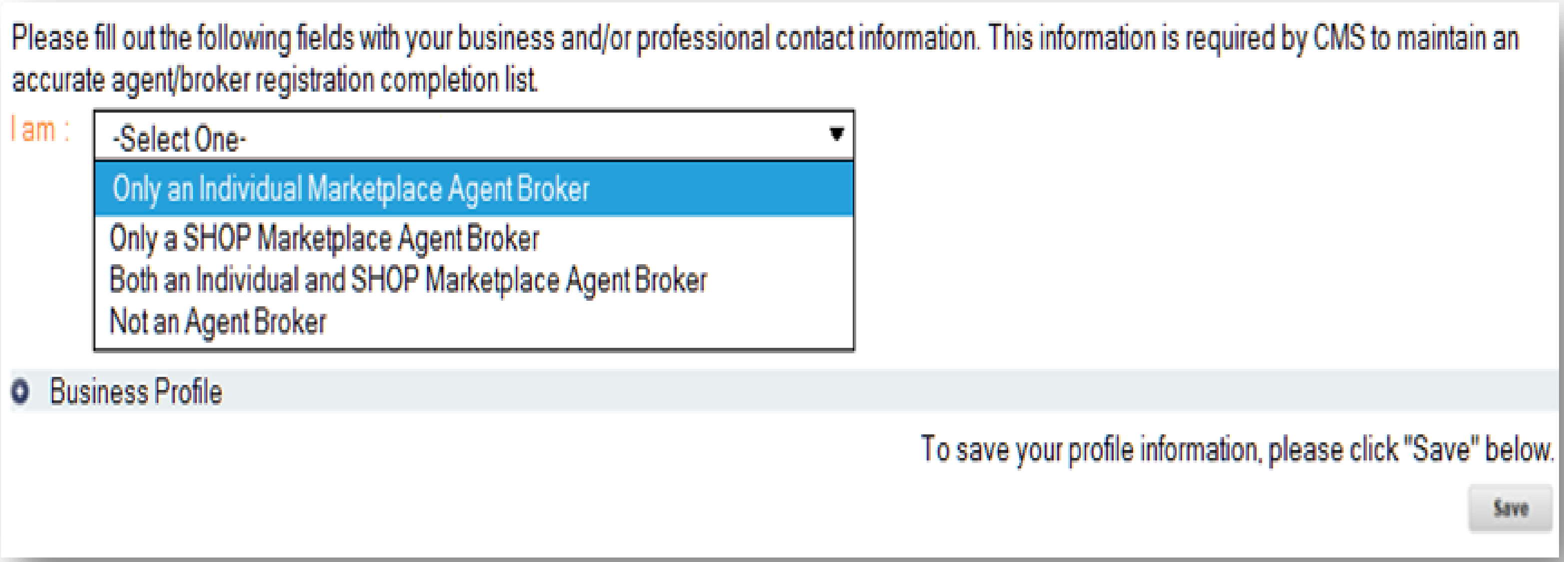
Step 4: Agent or Broker Completes MLMS Profile (continued)

The MLMS profile page will appear in a separate window for you to complete your profile information.



Step 4: Agent or Broker Completes MLMS Profile (continued)

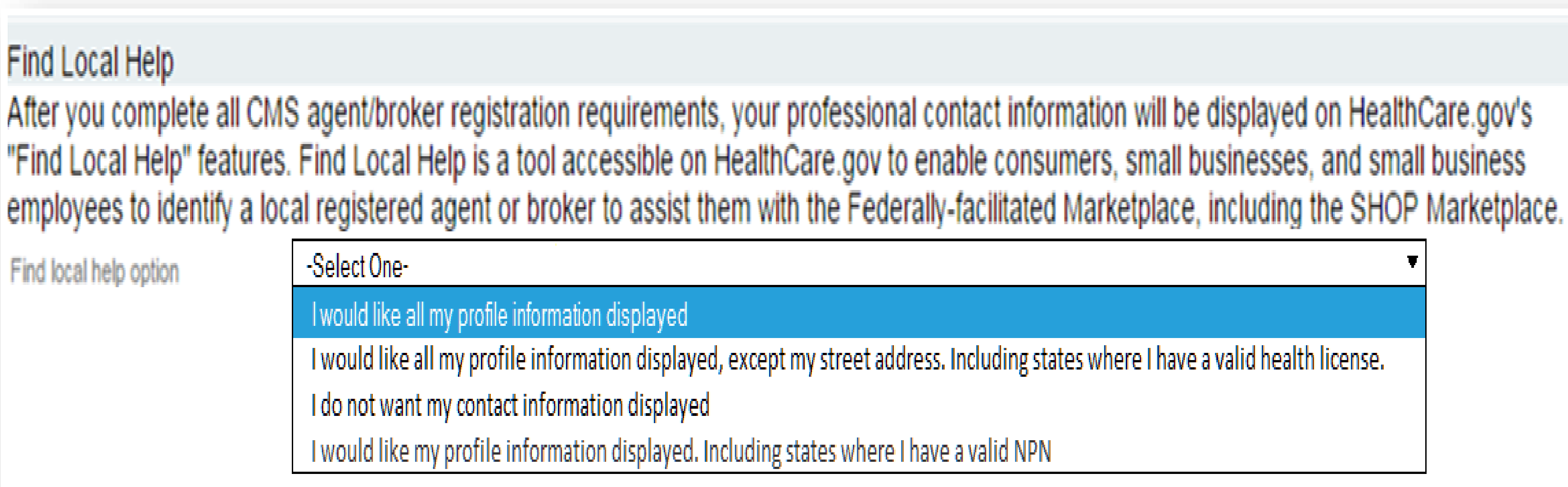
You will need to select one (1) role from four (4) options. Then, your appropriate role will show or hide the corresponding profile fields.



Step 4: Agent or Broker Completes MLMS Profile (continued)

The information you use to complete your MLMS profile will be used to populate "Find Local Help" on HealthCare.gov so consumers, small businesses and small business employees can find you for assistance.

- Access Find Local Help at https://localhelp.healthcare.gov/#intro.
- Also available in Spanish at https://ayudalocal.cuidadodesalud.gov/es/#intro.



Find Local Help

After you complete all CMS agent/broker registration requirements, your professional contact information will be displayed on HealthCare.gov's "Find Local Help" features. 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.

Find local help option

-Select One-

I would like all my profile information displayed

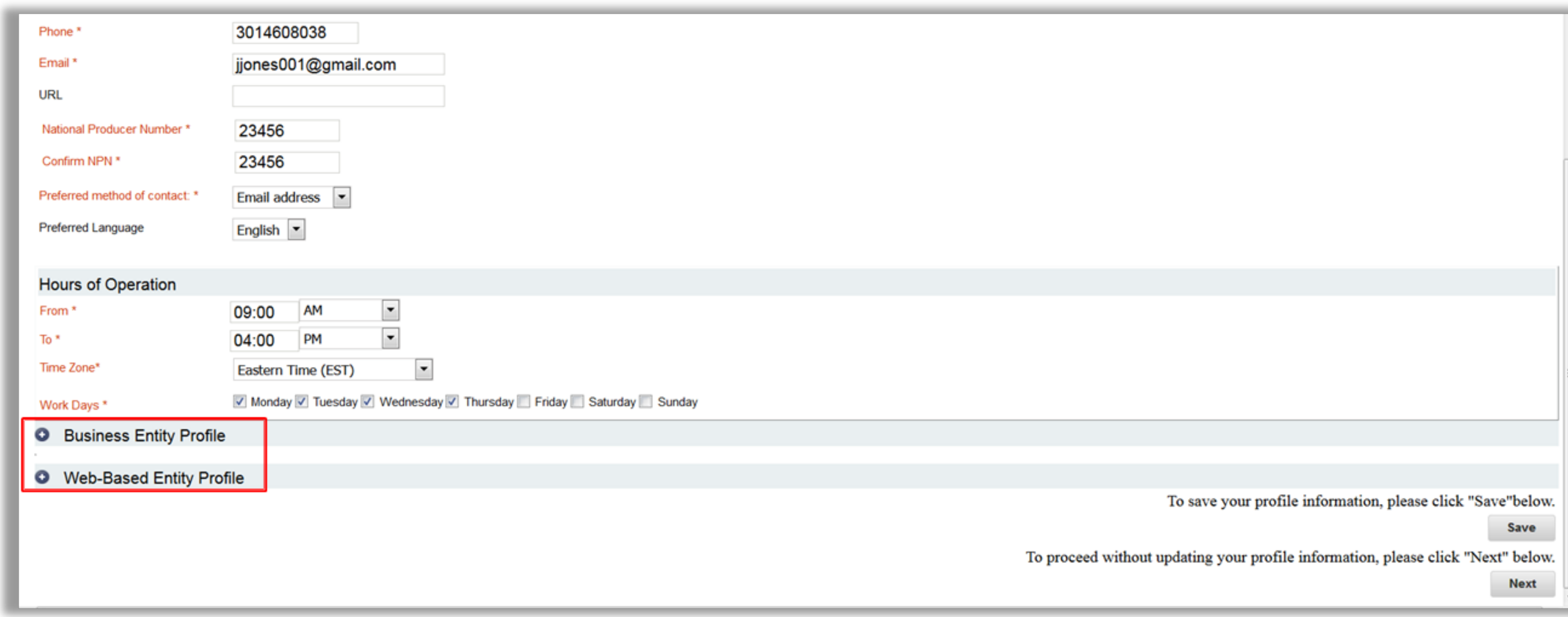
I would like all my profile information displayed, except my street address. Including states where I have a valid health license.

I do not want my contact information displayed

I would like my profile information displayed. Including states where I have a valid NPN

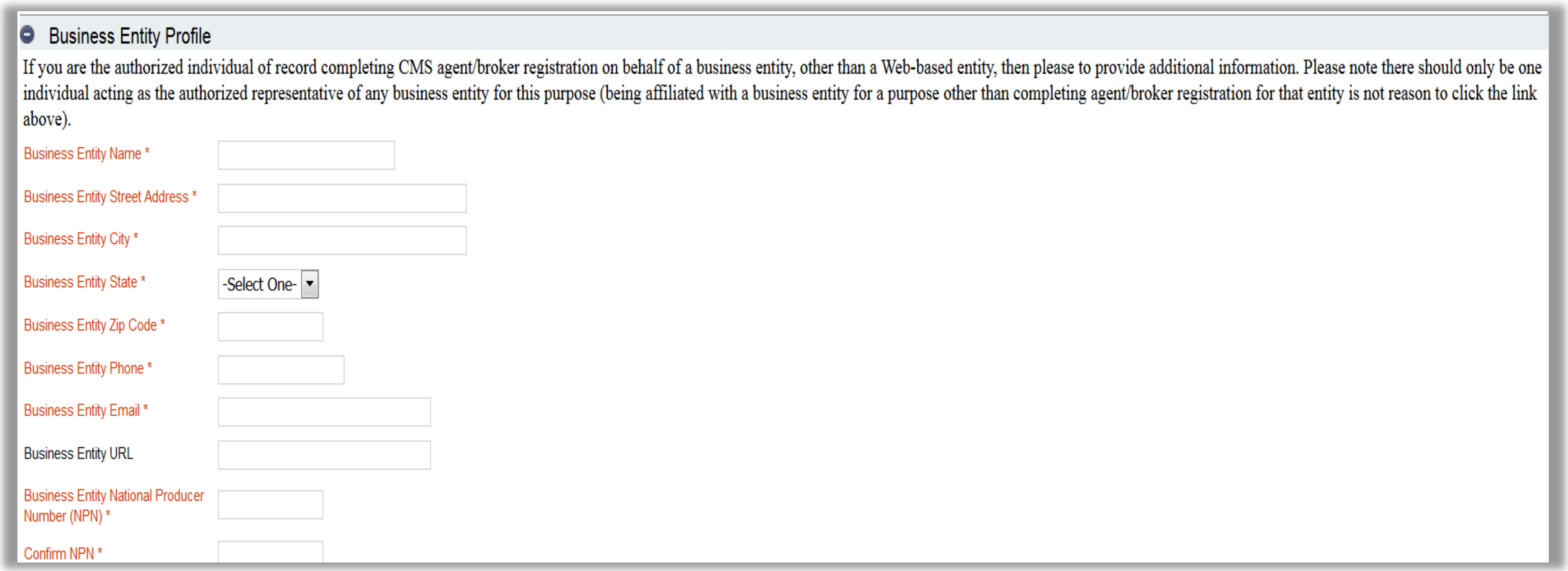
Step 4: Agent or Broker Completes MLMS Profile (continued)

- 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 National Producer Number (NPN) by selecting the appropriate "+" link at the bottom of the profile page.
- You can list up to three (3) NPNs in your MLMS profile.



Step 4: Agent or Broker Completes MLMS Profile (continued)

- Enter the information for the web-broker or business entity with which you are affiliated.
- 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.



Business Entity Profile

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 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 *

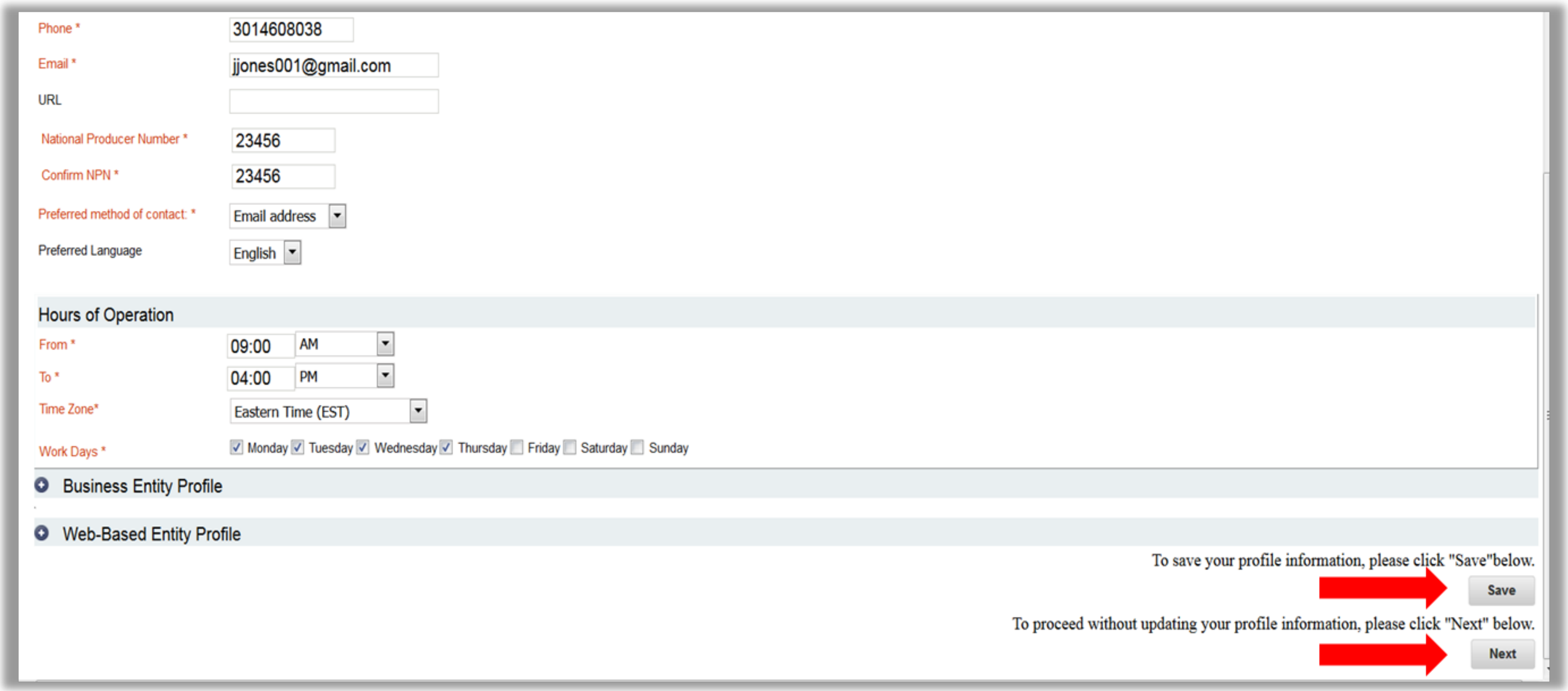
Business Entity URL

Business Entity National Producer Number (NPN) *

Confirm NPN *

Step 4: Agent or Broker Completes MLMS Profile (continued)

Once you have entered all your profile information, select “Save/Update” and then select “Next.”



Step 4: Agent or Broker Completes MLMS Profile (continued)

You must enter a correct NPN in your MLMS profile to receive credit for completing Marketplace registration.

- 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 your state license number. Be sure to use your NPN, not a state license number.
- To update the NPN, you can select the "Complete Agent Broker Training" hyperlink and update the information in your MLMS profile.
- Agent and broker NPNs can be found at www.nipr.com/PacNpnSearch.htm.

Be sure to confirm your NPN is correct in your MLMS profile.
Entering an inaccurate NPN could result in denial of compensation/credit by an issuer.

Step 5: Agent or Broker Completes Training

- The steps for completing agent and broker training differ depending upon the training option you choose.
- For plan year 2018, you have two (2) options for training via the CMS Enterprise Portal:
  - CMS-developed training through the MLMS
  - Training offered through a CMS-approved vendor
- Training is only required for participation in the Individual Marketplace. Agents and brokers who participate in SHOP are encouraged, but not required, to take SHOP training.

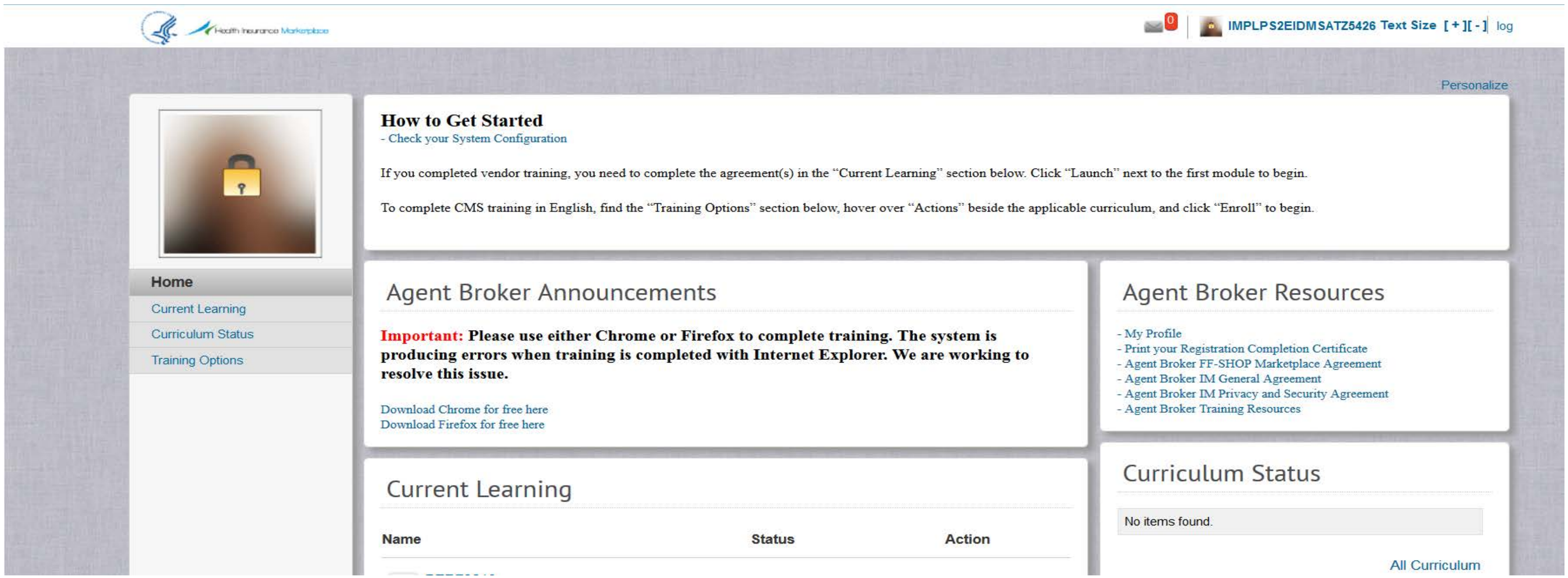
Step 5: Agent or Broker Completes Training (continued)

- For plan year 2018, Marketplace Agent and Broker Training for new agents and brokers has 10 core training modules available:
  - Welcome
  - Affordable Care Act Basics
  - Marketplace Basics
  - Individual Marketplace Eligibility for Enrolling in a Qualified Health Plan (QHP)
  - Individual Marketplace Eligibility for Enrolling in an Insurance Affordability Program
  - Individual Marketplace Enrollment
  - Privacy Standards and Definitions
  - Protecting and Handling Personally Identifiable Information
  - Information Security
  - SHOP Employer

- There are four (4) exams associated with the training courses:
  - Affordable Care Act and Marketplace Basics
  - Individual Marketplace
  - Privacy and Security Standards
  - SHOP

Step 5a: Agent or Broker Completes MLMS Training

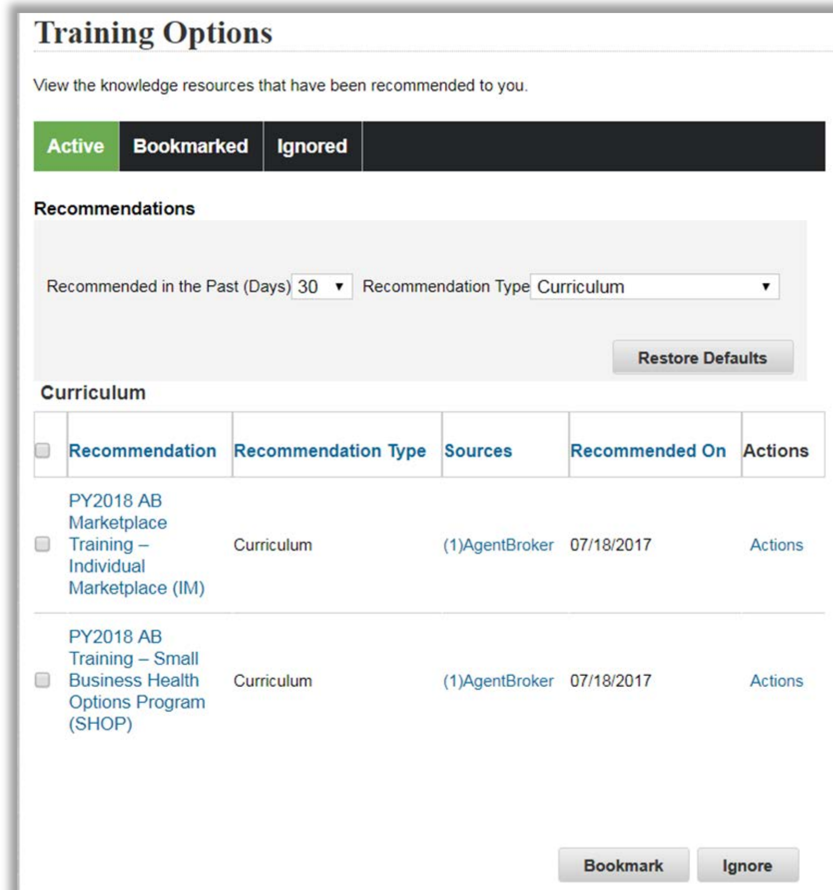
- After completing your MLMS profile, you will be redirected to the MLMS landing page.



Note: These screenshots are from the MLMS and apply to the CMS-developed training. If you chose to take training through a CMS-approved vendor, reference Step 5b.

Step 5a: Agent or Broker Completes MLMS Training (continued)

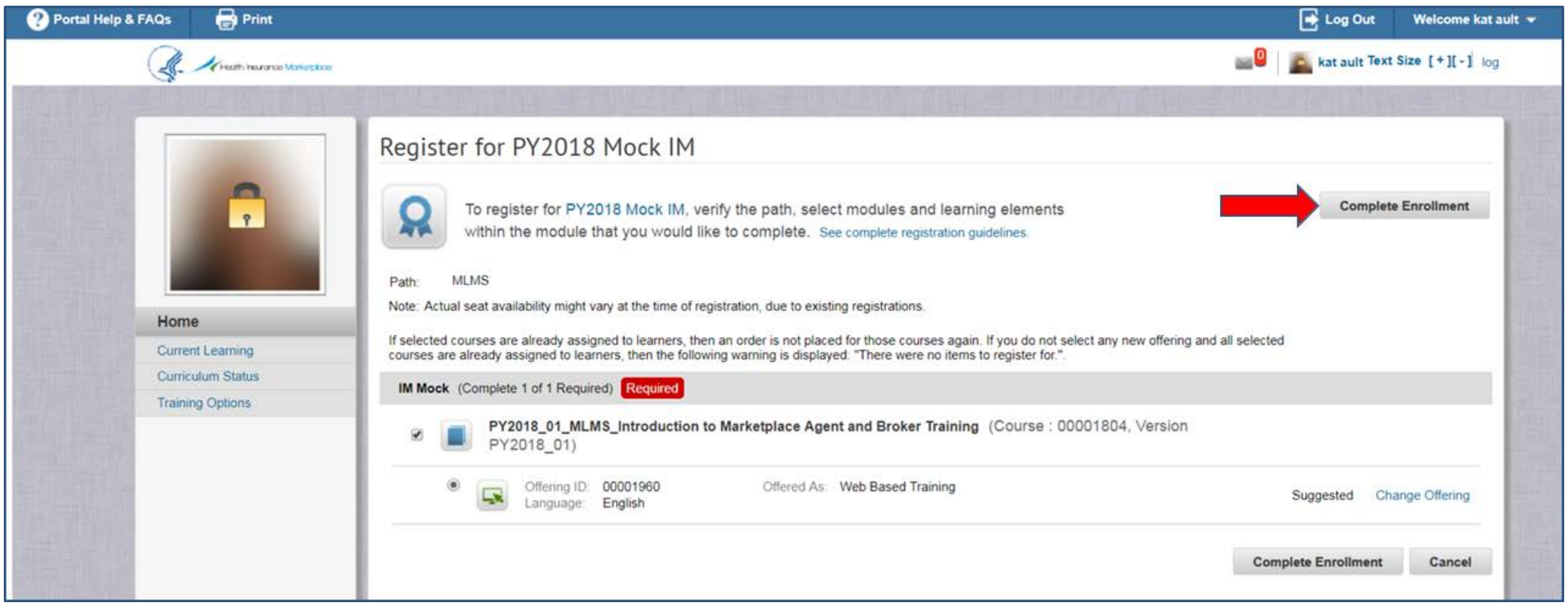
- If you wish to enroll in the full Individual Marketplace curriculum or in SHOP training, scroll down to find “Training Options.”
- Identify the curriculum you wish to enroll in, and hover your cursor over the “Actions” link to the right of that curriculum.
- In the “Actions” bubble, select the "Enroll” link.



Note: These screenshots are from the MLMS and apply to the CMS-developed training. If you chose to take training through a CMS-approved vendor, reference Step 5b.

Step 5a: Agent or Broker Completes MLMS Training (continued)

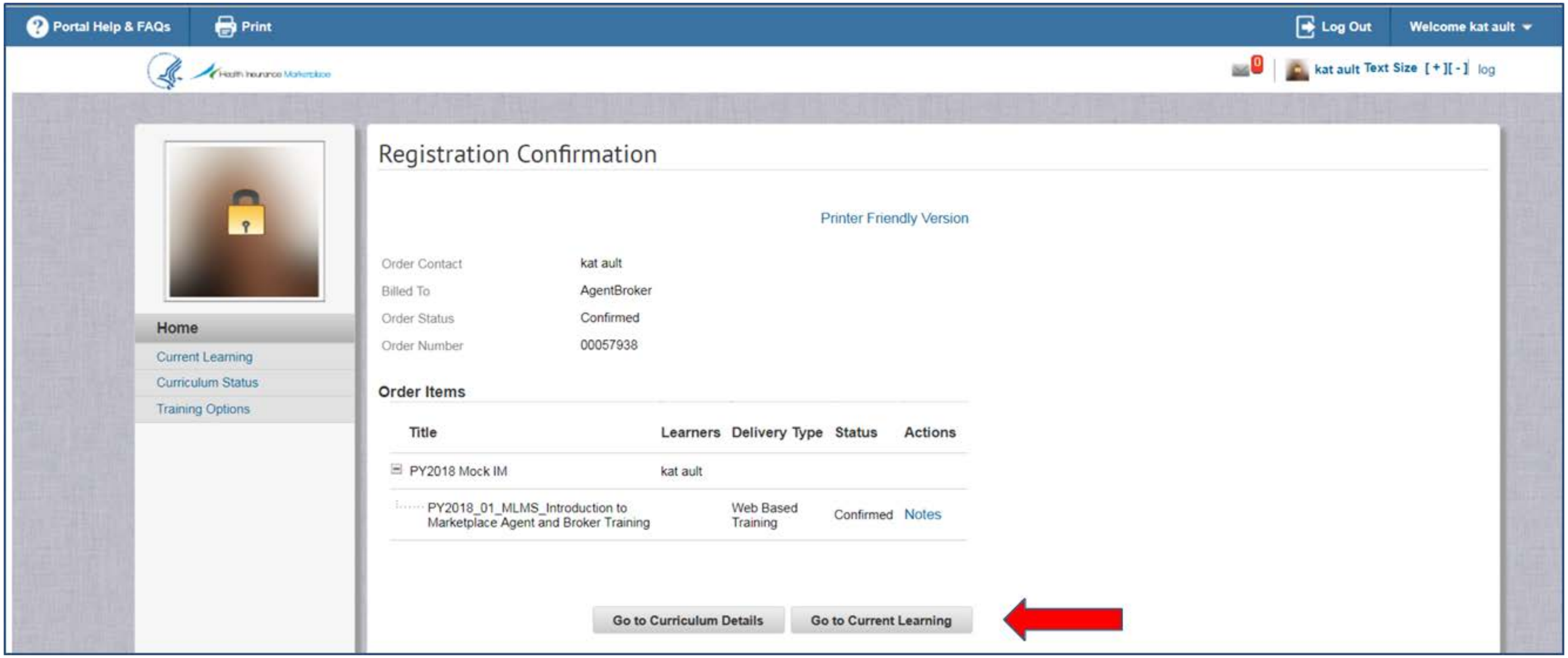
A page opens with the selected curriculum, including a list of the modules it includes. Select "Complete Enrollment" at the top of the screen.



Note: These screenshots are from the MLMS and apply to the CMS-developed training. If you chose to take training through a CMS-approved vendor, reference Step 5b.

Step 5a: Agent or Broker Completes MLMS Training (continued)

Select "Go to Current Learning" at the bottom of the page.

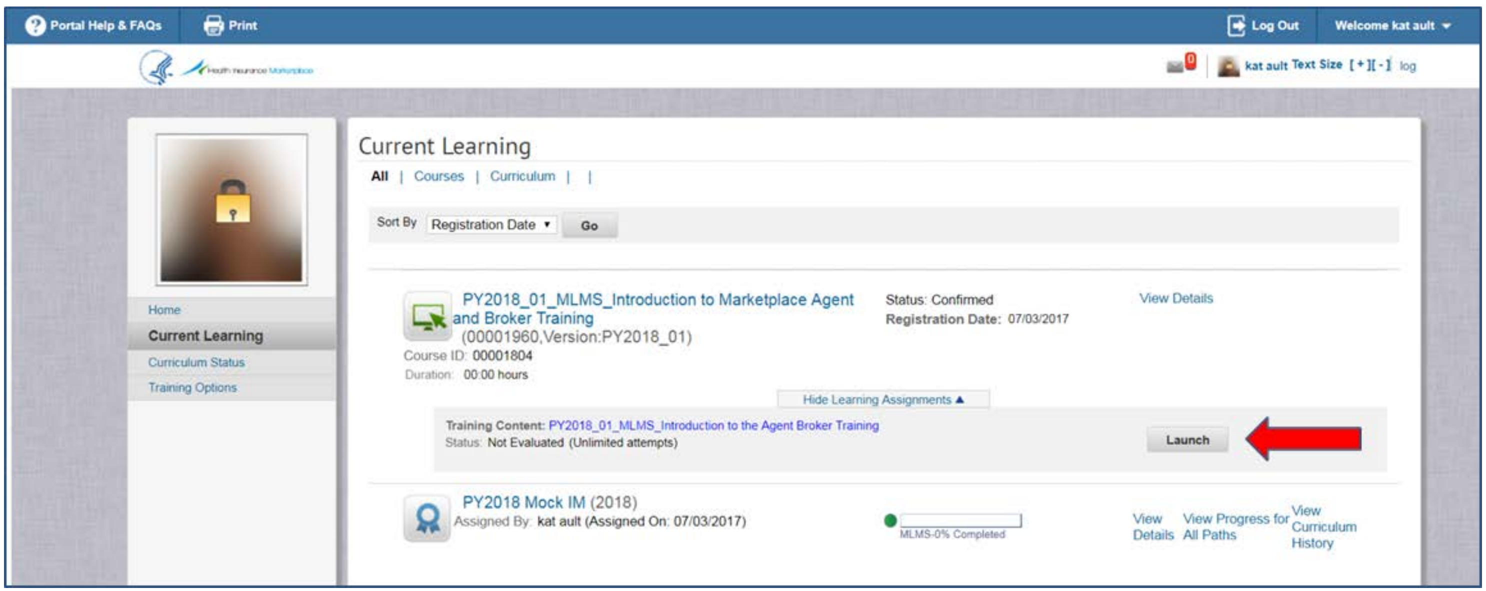


Note: These screenshots are from the MLMS and apply to the CMS-developed training. If you chose to take training through a CMS-approved vendor, reference Step 5b.

Step 5a: Agent or Broker Completes MLMS Training (continued)

You may start the curriculum's courses by selecting "Launch" next to each course.

- Note some modules have prerequisites, so there may not be a "Launch" button next to all of them.



Note: These screenshots are from the MLMS and apply to the CMS-developed training. If you chose to take training through a CMS-approved vendor, reference Step 5b.

Step 5b: Agent or Broker Completes CMS-approved Vendor Training

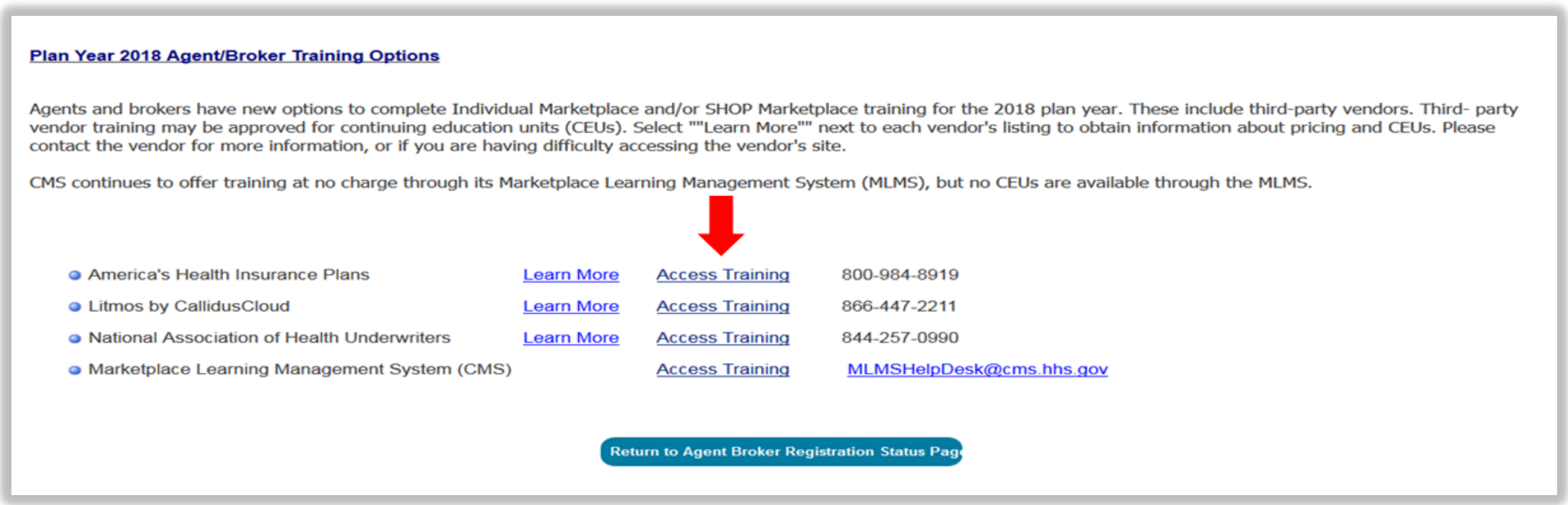
- In addition to the MLMS, three (3) vendors are approved to offer Marketplace training for plan year 2018.
  - **America's Health Insurance Plans, Inc. (AHIP):** For more information go to https://www.ahipexchangetraining.com/file.php/1/public/About.html
  - **Litmos by CallidusCloud (Litmos):** For more information go to http://cms.learnpass.com/learn-more
  - **National Association of Health Underwriters (NAHU):** For more information go to http://www.nahu.org/education/ffmtraining/index.cfm or, for continuing education unit (CEU) credit information, visit https://www.netstudy.com/nahu

Step 5b: Agent or Broker Completes CMS-approved Vendor Training (continued)

- CMS-approved vendors are required to offer CEU credits in a minimum of five (5) states where the Marketplace operates (45 CFR § 155.222).
  - Agents and brokers can use these CEUs to meet state licensure requirements for continuing education.
  - For more information on individual state CEU requirements, check with your state's Department of Insurance.
  - The states where CEUs are offered may vary by CMS-approved vendor. This information is available from each vendor via the CMS Enterprise Portal "Agent/Broker Training Options" page by selecting the vendor's "Learn More" link.
- CMS-approved vendors may charge a fee to take their training. Fees for plan year 2018 will range from $20-$125 depending on the vendor and the curriculum completed.
- Completing Marketplace training through a CMS-approved vendor still requires you to execute the applicable Agreement(s) on the MLMS prior to assisting consumers seeking to enroll in coverage through the Marketplace.

Step 5b: Agent or Broker Completes CMS-approved Vendor Training (continued)

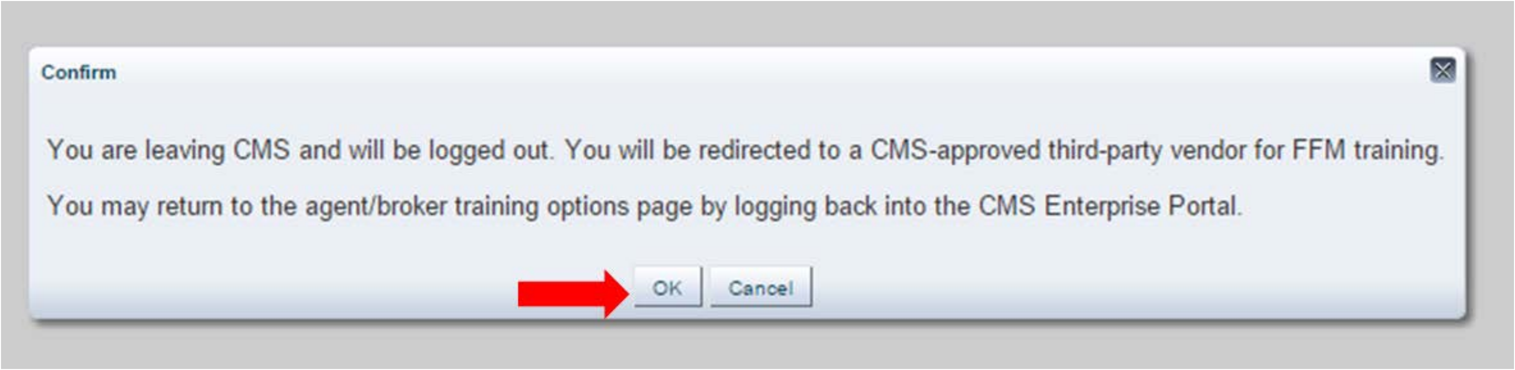
- If you chose to complete training through a CMS-approved vendor, you must access the vendor's training via the CMS Enterprise Portal. You <u>cannot</u> go directly to the vendor's website to access the training content.
- Select the "Access Training" link for your chosen vendor, and the CMS Enterprise Portal will redirect you to that vendor's website.
- As a reminder, CMS recommends taking CMS-approved vendor training prior to completing your MLMS profile (i.e., complete Step 5b before Step 4).



Note: These screenshots apply to accessing CMS-approved vendor training. If you want to complete the MLMS training, reference Step 5a.

Step 5b: Agent or Broker Completes CMS-approved Vendor Training (continued)

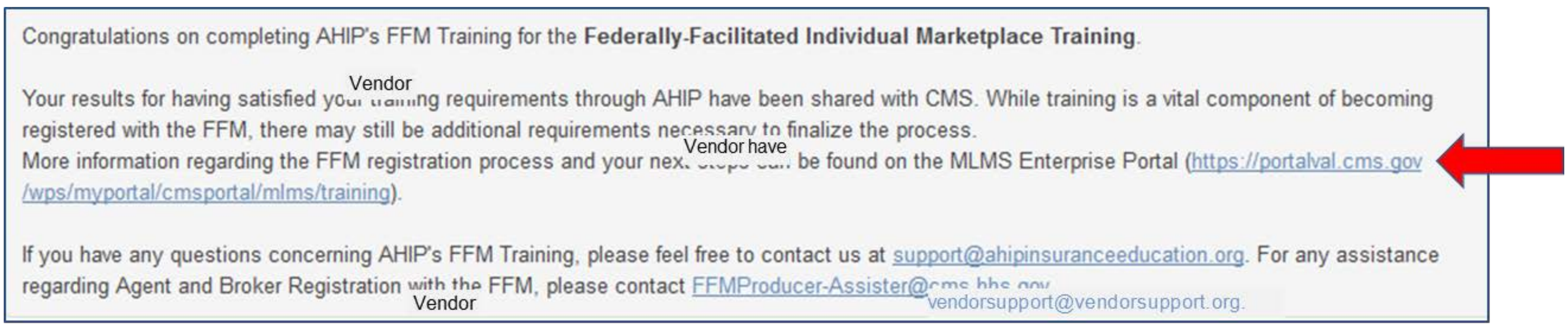
- The pop-up box below will appear.
- Select “OK” to confirm you want to be redirected to the CMS-approved vendor’s website. This action will automatically log you out of the CMS Enterprise Portal.



Note: These screenshots apply to accessing CMS-approved vendor training. If you want to complete the MLMS training, reference Step 5a.

Step 5b: Agent or Broker Completes CMS-approved Vendor Training (continued)

Once you complete the training through a CMS-approved vendor, you will be directed to log back in to the CMS Enterprise Portal to complete registration, including creating your MLMS profile (Step 4) and signing the Agreement(s) (Step 6).


Congratulations on completing AHIP's FFM Training for the **Federally-Facilitated Individual Marketplace Training**.

Vendor

Your results for having satisfied your training requirements through AHIP have been shared with CMS. While training is a vital component of becoming registered with the FFM, there may still be additional requirements necessary to finalize the process.

Vendor have

More information regarding the FFM registration process and your next steps can be found on the MLMS Enterprise Portal (https://portalval.cms.gov/wps/myportal/cmsportal/mlms/training).

If you have any questions concerning AHIP's FFM Training, please feel free to contact us at support@ahipinsuranceeducation.org. For any assistance regarding Agent and Broker Registration with the FFM, please contact FFMProducer-Assister@cms.hhs.gov

Vendor

vendorsupport@vendorsupport.org.

Note: These screenshots apply to accessing CMS-approved vendor training. If you want to complete the MLMS training, reference Step 5a.

Step 5b: Agent or Broker Completes CMS-approved Vendor Training (continued)

You will also receive a confirmation email from the vendor confirming completion of the training and detailing how to continue with Marketplace registration on the MLMS.

AB Test

6/23/2017

[External] Marketplace FFM Course: Individual Marketplace Completed

Congratulations !

Additional action is required to complete the Marketplace training and registration process with the Centers for Medicare & Medicaid Services (CMS):

1. Return to the CMS Enterprise Portal via the following link: https://portalval.cms.gov/wps/myportal/cmsportal/mlms/training
2. Complete/update your agent/broker profile on the MLMS
3. Read and accept the applicable Marketplace Agreement(s) on the MLMS
4. Confirm completion of all registration steps on the "Agent/Broker Registration Status" page on the CMS Enterprise Portal

For any assistance regarding Agent and Broker Marketplace Registration, please visit CMS' Resources for Agents and Brokers webpage (http://go.cms.gov/CCIIOAB) or contact the Agent/Broker Email Help Desk at FFMProducer-Assister@cms.hhs.gov.

Note: These screenshots apply to accessing CMS-approved vendor training. If you want to complete the MLMS training, reference Step 5a.

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

- You must request the Agent/Broker role and complete your MLMS profile information, identity proofing*, and the required training and exams before you can sign the Agreement(s).
- If you chose to take training from one of the CMS-approved vendors, you will need to log back into the MLMS via the CMS Enterprise Portal to execute the applicable Agreement(s).

**Note: If you completed identity proofing in a previous plan year, you will <u>not</u> need to complete it again.*

Step 6: Agent or Broker Executes the Agreement(s) with CMS (continued)

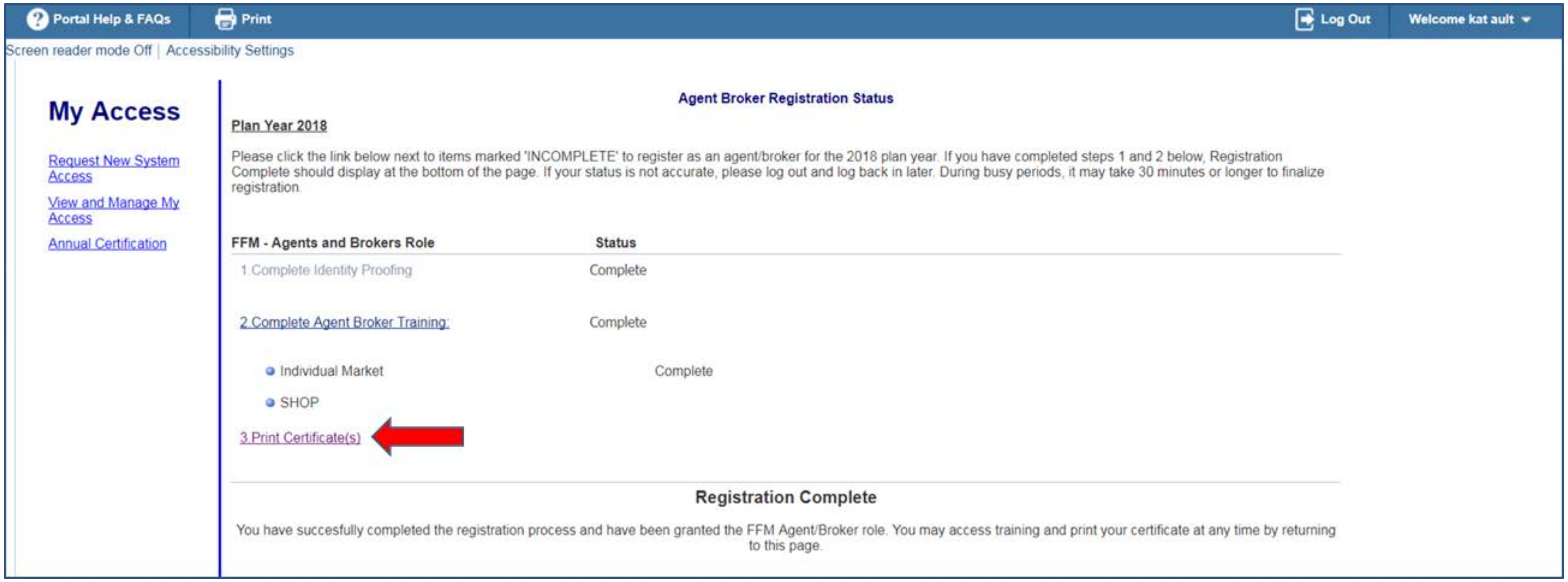
- Once you have completed the training (which is required for the Individual Marketplace and optional for SHOP), you will need to sign the Agreement(s).
  - After launching the appropriate Agreement module, review the Agreement language by selecting “Next” at the bottom of each screen to advance through the Agreement, and select “I Agree” at the end of the Agreement to confirm you have reviewed and accept the terms of the Marketplace Agreement.

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

- After you have executed the Agreement(s), you will be redirected back to the "Agent Broker Registration Status" page on the CMS Enterprise Portal.
  - To ensure the system completes the update of your records, wait for the progress bar to complete to 100 percent before logging out of the system.
- Once you have been redirected, you should review the "Agent Broker Registration Status" page to confirm you have completed all registration steps.

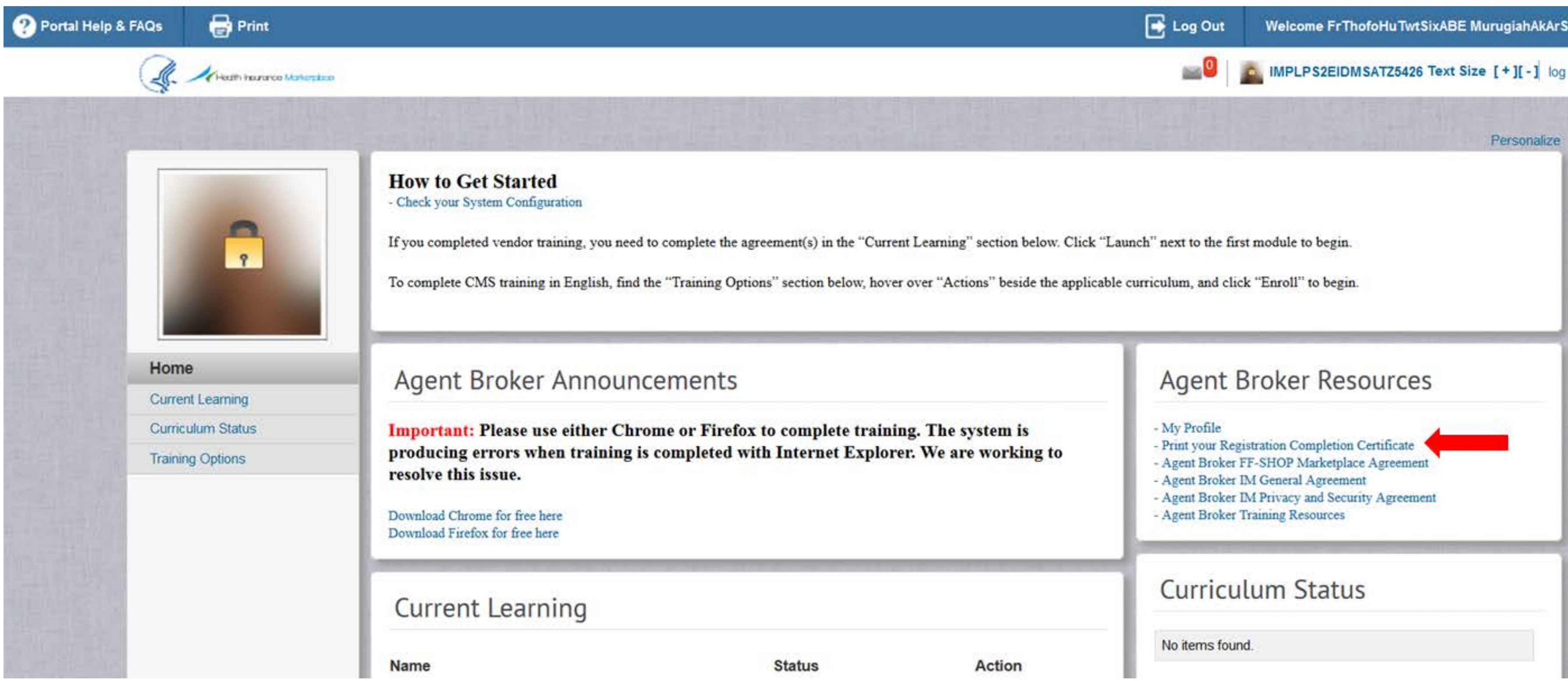
Step 7: Agent or Broker Confirms Completion on the Agent/Broker Registration Status Page (continued)

- At this time, if you have completed all steps, you will be able to print your Registration Completion Certificate(s).
- Select "Print Certificate(s)" on the "Agent Broker Registration Status" page.



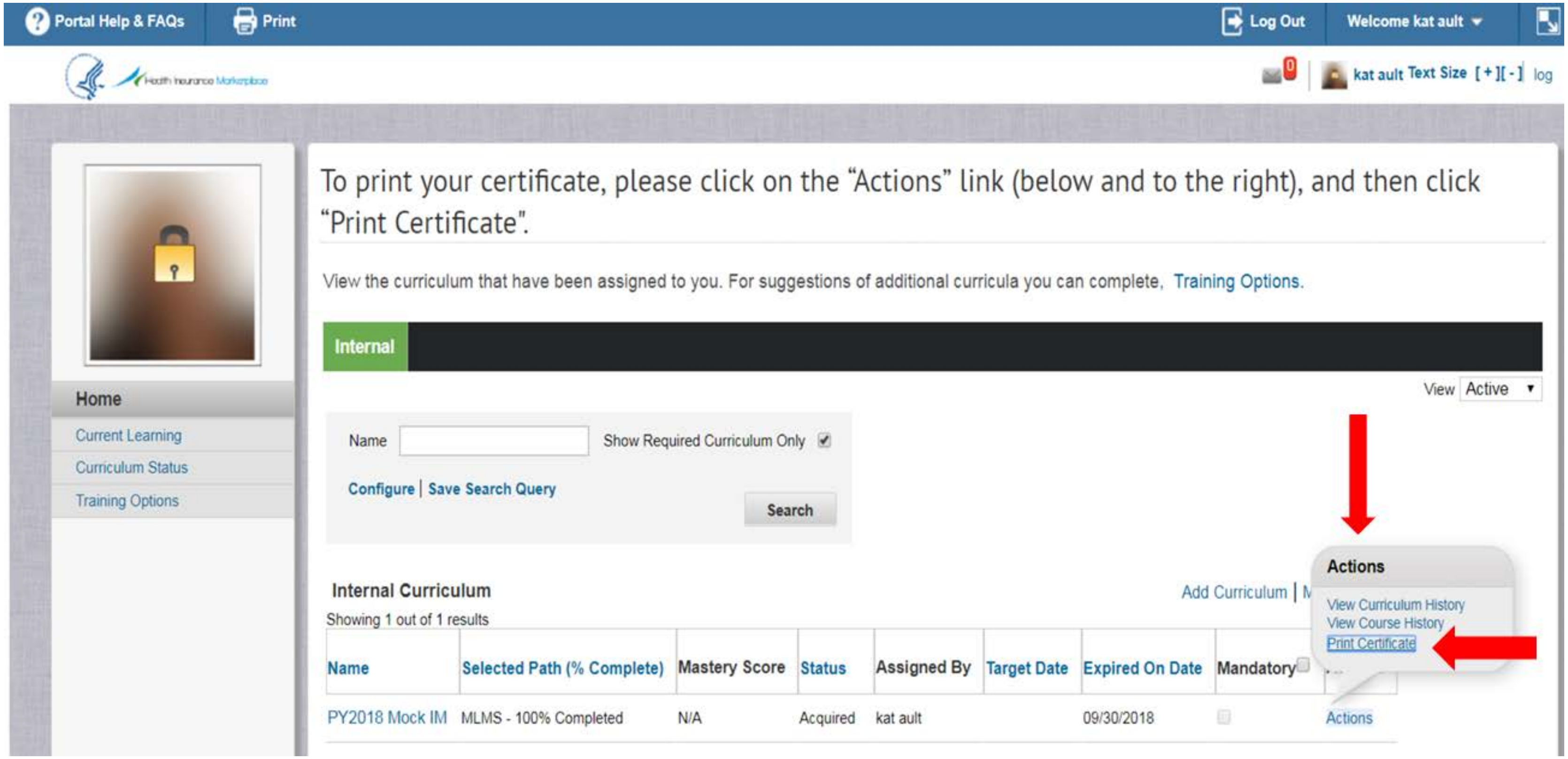
Step 7: Agent or Broker Confirms Completion on the Agent/Broker Registration Status Page (continued)

Select the “Print your Registration Completion Certificate” link once you have been redirected to the MLMS.



Step 7: Agent or Broker Confirms Completion on the Agent/Broker Registration Status Page (continued)

Then scroll over the “Actions” bubble and select “Print Certificate.”



Step 7: Agent or Broker Confirms Completion on the Agent/Broker Registration Status Page (continued)

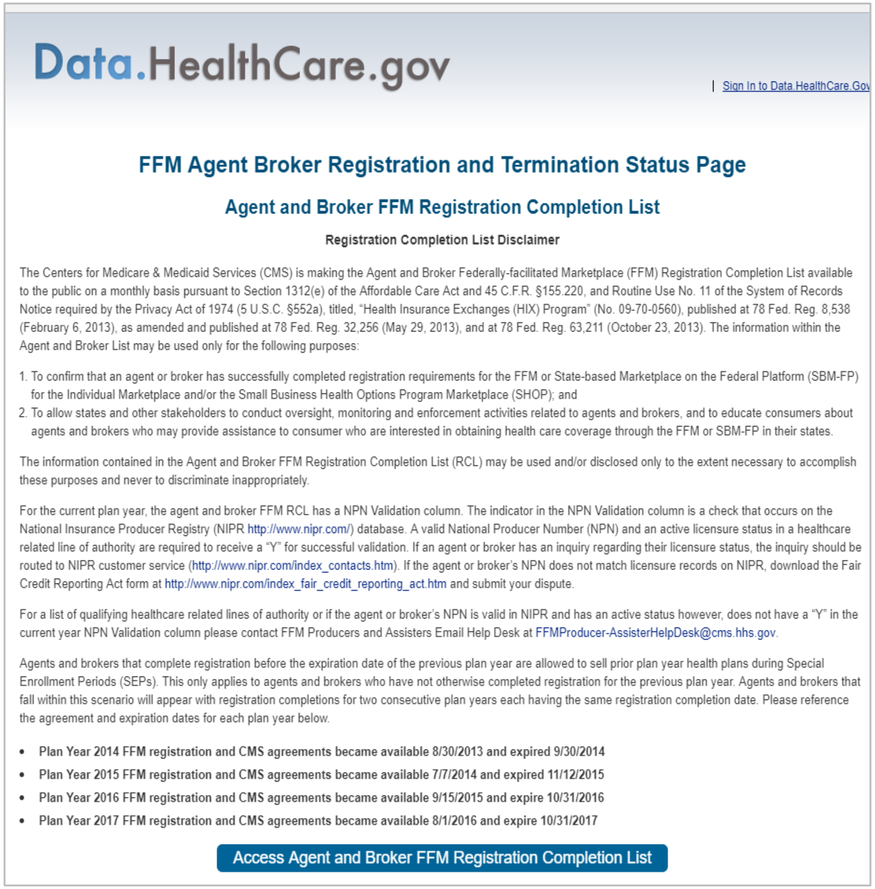
Your Registration Completion Certificate will include:

- Your name
- Your NPN(s)
- The market segment(s) for the certificate
- The plan year for the certificate
- The date you completed FFM registration

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, which is published by CMS and available via the Agents and Brokers Resources webpage at http://go.cms.gov/CCIIOAB *to confirm the registration status of agents and brokers.*

Step 7: Agent or Broker Confirms Completion on the Agent/Broker Registration Status Page (continued)

- You should also confirm that your information appears on the Registration Completion List (RCL) at https://data.healthcare.gov/ffm_ab_registration_lists.
- Your information may take one (1) to two (2) business days to appear on the RCL after completing all registration and training steps. It may take up to three (3) business days to appear on Find Local Help.
- If your NPN does not appear for plan year 2018, send an email to: FFMProducer-AssisterHelpDesk@cms.hhs.gov for assistance.



Plan Year 2018 Health Insurance Marketplace Registration and Training for New Agents and Brokers

Help Desk and Call Center Support

Agent/Broker Marketplace Help Desks and Call Centers

Help Desk Name	Phone # and/or Email Address	Types of Inquiries Handled	Hours of Operation (Closed Holidays)
Individual Marketplace Agent/Broker Partner Line	855-788-6275 Note: Enter your NPN to be directed to agent/broker assistance.	Inquiries related to specific consumers: • Password resets for consumer HealthCare.gov accounts • Special enrollment periods not available on the consumer application • Eligibility and enrollment issues related to the Individual Marketplace	Monday-Sunday 24 hours/day
Agent/Broker Email Help Desk	FFMProducer-AssisterHelpDesk@cms.hhs.gov	• Policy questions • Identity proofing/Experian issues requiring manual verification • Escalated general registration and training questions (not related to a specific training platform) • Agent/Broker Registration Completion List issues • Find Local Help issues	Monday-Friday 8:00 AM-6:00 PM ET

Agent/Broker Marketplace Help Desks and Call Centers (continued)

Help Desk Name	Phone # and/or Email Address	Types of Inquiries Handled	Hours of Operation (Closed Holidays)
Marketplace Service Desk	855-CMS-1515 855-267-1515 CMS_FEPS@cms.hhs.gov	• Password resets and account lockouts on the CMS Enterprise Portal (used to access the MLMS, the agent/broker training and registration system) • Login issues on the agent/broker landing page used for Direct Enrollment (often due to FFM User ID not populating correctly when the agent or broker is redirected from an issuer's or web-broker's site) • Other CMS Enterprise Portal account issues, requests, or error messages • 501 Downstream Error message on HealthCare.gov website issues • General registration and training questions (not related to a specific training platform) • General enrollment and eligibility policy questions related to the Individual Marketplace	Monday-Friday 8:00 AM-8:00 PM ET Saturday-Sunday 10:00 AM-3:00 PM ET (October–November only)

Agent/Broker Marketplace Help Desks and Call Centers (continued)

Help Desk Name	Phone # and/or Email Address	Types of Inquiries Handled	Hours of Operation (Closed Holidays)
Agent/Broker Training and Registration Email Help Desk	MLMSHelpDesk@cms.hhs.gov	• Technical or system-specific issues related to the agent/broker training and registration system (i.e., the MLMS) • User-specific questions about maneuvering in the MLMS site, or accessing training and exams	Monday-Friday 8:00 AM-5:00 PM ET
SHOP Call Center	800-706-7893	• All inquiries related to SHOP • SHOP agent/broker portal access questions • Employers and employees may also contact the SHOP Call Center for assistance	Monday-Friday 9:00 AM-7:00 PM ET
Direct Enrollment (formerly Web-Broker) Email Help Desk	DirectEnrollment@cms.hhs.gov	• All inquiries specifically related to becoming and/or operating as a direct enrollment issuer or web-broker in the Marketplace	Monday-Friday 9:00 AM-5:00 PM ET

Agent/Broker Marketplace Help Desks and Call Centers (continued)

Help Desk Name	Phone # and/or Email Address	Types of Inquiries Handled	Hours of Operation (Closed Holidays)
AHIP Training Help Desk	support@ahipinsuranceeducation.org 800-984-8919	All inquiries specifically related to the AHIP agent/broker training platform	**Call Center/Email** Monday-Friday: 8:00 AM-9:00 PM ET Saturday: 8:30 AM-5:30 PM ET
Litmos Training Help Desk	cmsffmsupport@litmos.com 844-675-6565	All inquiries specifically related to the Litmos agent/broker training platform	**Call Center** Monday-Friday 9:00 AM-5:00 PT **Email** 24 hours/day
NAHU Training Help Desk	NAHU-FFM@nahu.org 844-257-0990	All inquiries specifically related to the NAHU agent/broker training platform	**Call Center:** Monday-Friday: 9:00 AM-5:00 PM ET **Technical Support:** Monday-Friday: 8:00 AM-9:00 PM ET Saturday-Sunday: 8:00 AM-8:00 PM ET

CENTERS FOR MEDICARE & MEDICAID SERVICES

Plan Year 2018 Health Insurance Marketplace Registration and Training for New Agents and Brokers

Agent and Broker Resources

Upcoming Activities

- The slides from this webinar are available on REGTAP at www.REGTAP.info and will be available on the Resources for Agents and Brokers webpage at http://go.cms.gov/CCIIOAB in the coming days.
- In addition, this webinar will be available for on-demand training on REGTAP in early August.
- The Open Enrollment period for plan year 2018 will begin on November 1, 2017 and runs through December 15, 2017.
  - Weekly webinars will be held starting in October and throughout Open Enrollment to help you stay informed, notify you of important updates and deadlines, and answer any questions you might have.
  - To register for upcoming webinars, visit REGTAP at www.REGTAP.info.

Agent and Broker Resources

Resource	Link
Agents and Brokers Resources webpage	http://go.cms.gov/CCIIOAB
HealthCare.gov	https://www.healthcare.gov/
Outreach and Education Materials on Marketplace.CMS.gov	https://marketplace.cms.gov/outreach-and-education/outreach-and-education.html
Technical Assistance and Training on Marketplace.CMS.gov	https://marketplace.cms.gov/technical-assistance-resources/training-materials/training.html
Twitter updates @HealthCareGov	https://twitter.com/search?f=tweets&vertical=default&q=%23MktplaceABs%20from%3Ahealthcaregov&src=typd
Email updates via the CMS Enterprise Portal	Sign up by establishing an account on the CMS Enterprise Portal at https://portal.cms.gov/
SHOP Marketplace Agent/Broker Portal	https://healthcare.gov/marketplace/small-businesses/agent
RCL on Data.HealthCare.gov	https://data.healthcare.gov/ffm_ab_registration_lists
Find Local Help Tool	https://localhelp.healthcare.gov/
Agent and Broker NPNs	www.nipr.com/PacNpnSearch.htm

Agent and Broker Resources (continued)

Resource	Link
"News for Agents and Brokers" Newsletter	Distributed via email and available on the Agents and Brokers Resources webpage at http://go.cms.gov/CCIIOAB
"Marketplace Learning Management System (MLMS) Enhancements Overview" webinar slides	https://www.cms.gov/CCIIO/Programs-and-Initiatives/Health-Insurance-Marketplaces/Downloads/MLMS-Enhancements-Overview.pdf
Plan Year 2018 Health Insurance Marketplace Registration and Training for New Agents and Brokers" webinar slides	The slides from this webinar are available on REGTAP at www.REGTAP.info and will be available on the Resources for Agents and Brokers webpage at http://go.cms.gov/CCIIOAB in the coming days
Plan Year 2018 Health Insurance Marketplace Registration and Training for Returning Agents and Brokers" webinar slides	The slides from this webinar are available on REGTAP at www.REGTAP.info and will be available on the Resources for Agents and Brokers webpage at http://go.cms.gov/CCIIOAB in the coming days

Agent and Broker Resources (continued)

Resource	Link
For QHPs available in the Marketplace in your state, view the QHP landscape file available	https://www.healthcare.gov/health-and-dental-plan-datasets-for-researchers-and-issuers/
Regulation authorizing agents and brokers to assist consumers with selecting and enrolling in QHPs offered through the Marketplaces	Regulation 45 CFR 155.220
CMS-approved vendor training option regulation	Regulation 45 CFR 155.222
CMS' eight (8) privacy principals regulation	Regulation 45 CFR 155.260(a)
Patient Protection and Affordable Care Act Market Stabilization Final Rule	Regulation 82 FR 18346

Agent and Broker Resources: Definition of Acronyms

Acronym	Definition
CCIIO	Center for Consumer Information and Insurance Oversight
CEU	Continuing Education Unit
CMS	Centers for Medicare & Medicaid Services
EIDM	Enterprise Identity Management
FFM	Federally-facilitated Marketplace
FF-SHOP	Federally-facilitated Small Business Health Options Program
FTE	Full-time Equivalent
MLMS	Marketplace Learning Management System

Agent and Broker Resources: Definition of Acronyms (continued)

Acronym	Definition
MPR	Minimum Participation Rate
NPN	National Producer Number
Q&A	Question and Answer
QHP	Qualified Health Plan
RCL	Registration Completion List
SBM	State-based Marketplace
SBM-FP	State-based Marketplace on the Federal Platform
SHOP	Small Business Health Options Program