



Title: Questions and Answers for the Plan Year 2018 Vendor Training Application

Date: November 1, 2016

Q: What is the purpose of the Application?

A: Pursuant to 45 C.F.R. § 155.222, the Centers for Medicare & Medicaid Services (CMS) is releasing the vendor training application for organizations interested in applying to become a plan year 2018 vendor of Federally-facilitated Marketplace (Marketplace) training for agents and brokers assisting consumers with enrollment through the Marketplace (including both the Individual and Small Business Health Options Program (SHOP) Marketplaces).

Q: Why is CMS doing this?

A: Our intent is to make the Marketplace training and registration process easier for agents and brokers, and to attract greater agent and broker participation in the Marketplace through partnerships with third-party organizations. CMS will use the application to evaluate whether an applicant meets the requirements to become a vendor.

Q: How are agents and brokers impacted by this program?

A: For plan year 2018, agents and brokers will have the option to complete Marketplace training through the online platform of an approved vendor. Any approved vendor will also provide technical assistance to those agents and brokers who access its training. Agents and brokers who complete Marketplace training through a vendor will still need to execute all applicable Marketplace Agreements with CMS prior to assisting consumers seeking to enroll in coverage through the Marketplace.

Q: What does this mean for State-based Marketplaces?

A: State-based Marketplaces have their own standards for training and registration, which must be followed by agents and brokers in those states. However, some State-based Marketplaces have received approval to utilize the federal platform to support selected eligibility and enrollment functions for the Individual Marketplace, the SHOP Marketplace, or both. Agents and brokers in these Marketplaces (known as State-based Marketplaces on the Federal Platform) must complete the Federally-facilitated Marketplace registration and training requirements. This includes completing agent and broker training through an approved vendor, or through the CMS Marketplace Learning Management System, in order to satisfy standards for participation in the states' Individual and SHOP Marketplaces.

Q: How has the application changed for plan year 2018?

A: CMS has taken steps to streamline the application for plan year 2018 to minimize the administrative burden on potential applicants. CMS has eliminated duplicative questions and introduced more direct, tailored questions regarding technical requirements, testing, and quality assurance.

For plan year 2018, CMS is also requesting that prospective applicants submit a Notice of Intent via email to AgentBrokerVendor@cms.hhs.gov by 11:59 PM ET on November 10, 2016. The intent to submit an application is not binding and will be relied on by CMS for planning purposes only. Submitting a negative response or no response does not preclude an organization from submitting an application.

Q: Will agents and brokers be able to receive continuing education units (CEUs) for Marketplace training offered by approved vendors?

A: Yes. Approved vendors must offer CEUs in at least five states in which a Federally-facilitated Marketplace or State-based Marketplace on the Federal Platform is operating.

Q: Will CMS continue to provide Marketplace training to agents and brokers?

A: Yes. For plan year 2018, CMS will continue to offer Marketplace training and registration for agents and brokers in the Individual and SHOP Marketplaces at no cost to agents and brokers. CMS will also continue to offer technical assistance and other guidance on the process for completing Marketplace training and registration.

Q: Are conditionally approved vendors required to develop their own Marketplace training for agents and brokers?

A: No. For plan year 2018, approved vendors will be required to offer CMS-developed training content for both the Core and Refresher Training curriculum.

Q: Are approved vendors permitted to supplement CMS-developed training content?

A: Vendors that wish to modify or supplement the training content provided by CMS must gain prior written approval from CMS. CMS will then establish a timeline for review and approval of the revised content.

Q: When will CMS make its training content available to conditionally approved vendors?

A: CMS will make its Marketplace training content available to vendors approximately 30 days prior to the scheduled go-live date. More detailed schedule information will be provided in early 2017.

Q: What is the estimated go-live date for plan year 2018 Marketplace training?

A: CMS intends to make Marketplace training for plan year 2018 available to agents and brokers in July or August 2017. A final schedule will be made available to conditionally approved vendors in early 2017.

Q: Are approved vendors required to offer Marketplace training for agents and brokers in Spanish?

A: No. Approved vendors have the option to provide Spanish language training, but are not required to do so at this time.

Q: Are approved vendors required to perform information verification functions for agents and brokers?

A: No. In the 2017 Payment Notice Final Rule, CMS eliminated the requirement from 45 C.F.R. § 155.222 that approved vendors perform information verification services, as CMS intends to

continue performing the identity proofing function and expects that qualified health plan issuers are overseeing affiliated agents and brokers to ensure that they have the appropriate licenses required under the applicable State law.

Q: Are vendors that were approved to provide Marketplace training for agents and brokers for plan year 2017 required to reapply if they wish to participate in the vendor training program for plan year 2018?

A: Yes. According to 45 C.F.R. § 155.222(a)(3), each vendor must submit an application for each year that approval is sought.

Q: What is the deadline and process for submitting the application and receiving approval from CMS?

A: The application is due to CMS by 11:59 PM ET on Wednesday, November 23, 2016. Applicants should email the application along with any attachments to CMS at AgentBrokerVendor@cms.hhs.gov. Questions should also be sent to this address. CMS anticipates conditionally approving vendors during the month of December. Final approval to provide training to Marketplace agents and brokers is contingent upon the following conditions:

1. Submission of a signed Agent Broker Vendor Agreement;
2. Submission and CMS approval of final training content (if applicable);
3. CMS approval of vendor's information technology processes, including the vendor's demonstrated ability to collect, store, and share agent and broker training completion data with CMS;
4. Offering CEU credits in a minimum of five states where the Marketplace is operating;
5. Providing technical support to agents and brokers completing the vendor's training; and
6. Compliance with CMS system standards and applicable regulatory requirements.

Q: Will CMS provide additional information about the vendor training program and answer questions from prospective applicants?

A: Yes. CMS plans to host a webinar on Tuesday, November 15, 2016 at 1:00 PM ET. Applicants who submit a Notice of Intent by 11:59 PM ET on November 10, 2016 will be automatically included in the meeting invitation for this webinar. Other individuals and/or organizations who wish to participate should send an email to AgentBrokerVendor@cms.hhs.gov no later than November 14, 2016.