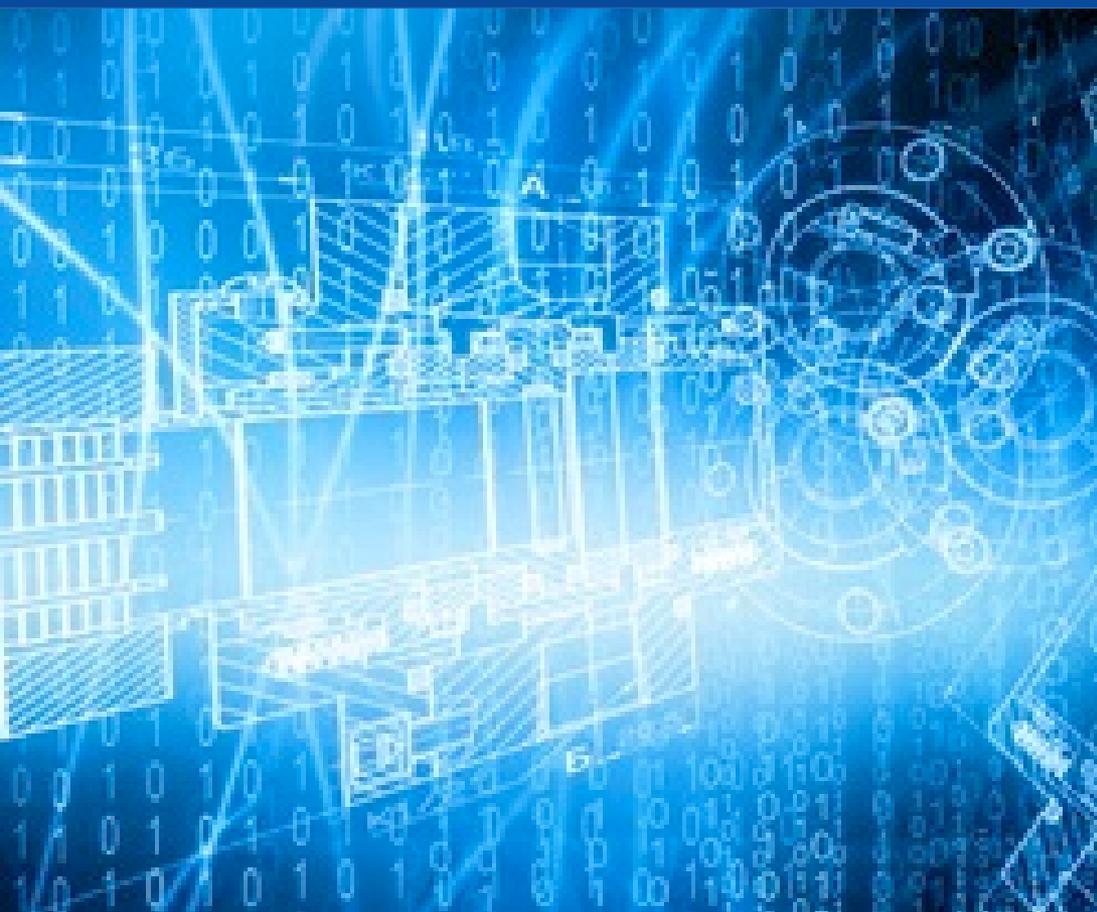


# Federally-facilitated Marketplace Enrollment: Tips for Agents and Brokers in the Individual Market



**January 28, 2014**

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# Objective

This document is designed to assist agents/brokers as they assist consumers to enroll in individual market QHPs on the Federally-facilitated Marketplaces (FFM). This document provides tips on the key screens for agent/broker assistance during enrollment in the FFM.

There are two pathways for agents/brokers to help qualified individuals enroll in an individual market QHP:

1. the direct enrollment pathway, through which the agent logs on to an issuer's website to assist the consumer;
2. the Marketplace pathway, or "side by side" pathway, through which the agent/broker assists the consumer to use the Marketplace website; or

An overview of key steps for these pathways follows.

# Direct Enrollment Pathway: Overview

First, please check with your issuers if direct enrollment is supported.

If you are affiliated with a issuer that supports direct enrollment, you will be able to use the issuer's online agent/broker platform to assist the consumer with the completion of an application on the Marketplace website and then help the consumer select a qualified health plan (QHP). Check with your issuer for training on the direct enrollment process, and how to log in to their site.

# Direct Enrollment Pathway: Overview, cont.

*Using the direct enrollment pathway provided through an issuer, you will be able to log on to an agent/broker landing page on the Marketplace website and assist with the completion of an application with a consumer.*

*Please note that you must be working with an issuer that supports direct enrollment to access the agent/broker landing page on the Marketplace website.*

*The following walkthrough does not represent every step in the process, but rather some of the key steps that are integral to a successful enrollment.*

*Please note: Each agent should check with their Issuer for Issuer specific training on direct enrollment, and how to use the Issuer's site for direct enrollment.*

# Direct Enrollment Pathway: Key Screen Shots

The screenshot shows the HealthCare.gov agent/broker portal interface. At the top, there is a navigation bar with 'HealthCare.gov' on the left, 'Learn' and 'Get Insurance' in the center, and a user profile for 'Joyce\_Agent' with a person icon and a language selector for 'Español' on the right. Below the navigation bar is a blue banner with the text 'Return to [Agent/Broker's Portal]'. The main content area has a dark blue background with the heading 'What would you like to do?'. There are two white boxes with green buttons. The left box is titled 'Start a client's new application' and contains instructions: 'To start a new application, enter the state in which your client wishes to purchase Marketplace coverage.' Below this is a 'State' label and a dropdown menu. A green button labeled 'START APPLICATION' is at the bottom of this box. The right box is titled 'Look up a client's existing application' and contains instructions: 'To find a client's existing Marketplace application, click the button below and enter the requested information on the page that follows. (This is for applications that have already been started. If you are starting a new application, please refer to the 'Start Application' feature on the left.)' A green button labeled 'LOOK UP APPLICATION' is at the bottom of this box.

After you log in through an issuer's online portal, you will be securely redirected from the issuer's online portal to an agent/broker landing page on the Marketplace website.

# Direct Enrollment Pathway: Key Screen Shots

To find an application that your client had previously submitted/started:

**Enter the consumer's full information, and click "SEARCH" to retrieve the application.**

To start a new application for a client: enter **their State**, and click **"Start Application."**

The screenshot shows the HealthCare.gov interface. At the top, there are navigation links for 'Learn' and 'Get Insurance', along with a user profile for 'Joyce\_Agent' and a language selector for 'Español'. A blue banner at the top right contains a link to 'Return to [Agent/Broker's Portal]'. The main content area is titled 'Look up a client's existing application' and includes the following instructions: 'To find a client's existing Marketplace application, enter his or her information below. (The easiest way to find a client's application is to enter the client's Marketplace application ID in addition to the required information.)' The form contains several input fields: 'Client's Marketplace application ID optional', 'First name', 'Middle Optional', 'Last name', 'Suffix Optional' (with a dropdown menu), 'Email', 'Application State' (with a dropdown menu), 'Date of birth' (with a placeholder 'MM/DD/YYYY'), 'Social Security number optional' (with a placeholder 'XXX-XX-XXXX'), 'Street address', 'Apt./Ste. # optional', 'City', 'State' (with a dropdown menu), and 'ZIP code'. At the bottom right of the form are two buttons: 'CANCEL' and 'SEARCH'.

# Direct Enrollment Pathway: Key Screen Shots

The screenshot displays the HealthCare.gov interface. At the top, the 'Get Insurance' tab is selected. The user is logged in as 'Wisconsin'. A navigation bar includes 'Return to issuer website' and a card for a '2014 application for Individuals & Families (ID#: 95830247)' with a 'View all applications' link. A sidebar on the left lists menu items: 'My plans & programs', 'Eligibility & appeals', 'Applications details', 'Report a life change', 'Communication preferences', and 'Authorized users'. The main content area is titled 'APPLICATION STATUS' and features a prominent message: 'Your application is incomplete'. Below this message is a green button labeled 'CONTINUE APPLICATION'. A second message asks 'Need to remove your application?' and provides instructions on how to do so, with a link to 'Learn more before removing this application.' A 'Live Chat' button is visible in the bottom right corner.

If the consumer's previously-started application is found,  
click **"CONTINUE APPLICATION"**.

# Direct Enrollment Pathway: Key Screen Shots

The screenshot shows the HealthCare.gov website interface. At the top, there are navigation tabs for 'Learn' and 'Get Insurance', with 'Get Insurance' selected. A 'Logout' link is in the top right. Below the navigation, there's a 'Wisconsin' state indicator and a progress bar with 'Apply', 'Get Results', and 'Get Coverage' steps. A 'Return to issuer website' link is also present. The main content area features a sidebar on the left with a 'GET STARTED' section containing a numbered list of steps: 1. Privacy policy, 2. Contact information, 3. Help applying for coverage, 4. Help paying for coverage, and 5. Who needs coverage. Below this are sections for 'FAMILY & HOUSEHOLD', 'ADDITIONAL INFORMATION', and 'REVIEW & SIGN'. The central focus is a large blue box titled 'Start your application' with the text: 'You can apply for any of these people on this same application, even if they already have health coverage now:'. It lists three categories: 'Yourself' (with a person icon), 'Other family members' (with a family icon), and 'Anyone on your same federal income tax return (if you file one)' (with a tax icon). Below this, it states 'All fields are required unless they're marked optional.' and 'You may need:' followed by two bullet points: 'Names, birth dates, and income information for your family' and 'Social Security numbers (if they're available) for the people who want coverage'. A large green 'NEXT' button is at the bottom right of the blue box. A 'Live Chat' button is in the bottom right corner of the page. A 'Connecting...' status indicator is visible in the bottom left.

If this is a new application, you will see this screen.

Click "NEXT".

# Direct Enrollment Pathway: Key Screen Shots

The screenshot shows the 'Contact information' step in the Wisconsin Direct Enrollment process. The top navigation bar includes 'Wisconsin', 'Apply', 'Get Results', and 'Get Coverage'. A 'Return to issuer website' link is visible. The left sidebar shows a progress list with '2 Contact information' selected. The main form area has a title 'Contact information' and a note: 'If we need to contact you, we'll use this information from your Marketplace account (If any of these fields are blank, you can add information here.) Don't enter any letters with special characters, like accents, tildes, etc.' The form fields are: 'First name' (John), 'Middle optional' (R), 'Last name' (Smith), 'Suffix optional' (Select...), 'Date of birth' (08/23/1980), 'Email' (consumer@mail.com), 'Home address' (Street address), and 'Apt./Ste.# optional'.

Verify consumer's "Contact Information":

Some of the information may be carried over from the Issuer's site and be pre-populated here.

# Direct Enrollment Pathway: Key Screen Shots

The screenshot displays the Wisconsin Direct Enrollment application interface. At the top, there is a navigation bar with the Wisconsin logo, the 'Apply' step highlighted, and 'Get Results' and 'Get Coverage' steps. A 'HELP' link is visible in the top right. Below the navigation bar, there is a 'Return to issuer website' link and an 'EDIT' button. The main content area shows the application ID: 95830247. On the left, a sidebar lists the application steps: 'GET STARTED' (with a plus icon), 'Privacy policy', 'Contact information', '3 Help applying for coverage' (highlighted with a blue bar), '4 Help paying for coverage', and '5 Who needs coverage'. Below this, there are sections for 'FAMILY & HOUSEHOLD', 'ADDITIONAL INFORMATION', and 'REVIEW & SIGN'. The main content area features a light blue notification box stating: 'You've told us another person is helping you complete the application.' Below this, a warning message reads: 'We need to make sure that only people who have your permission are viewing the application. Enter a security response. Choose only information that you'll know.' The 'Question 1' is 'In what city or town was your first job?' with a dropdown arrow. The 'Answer 1' is 'job'. A green 'SAVE & CONTINUE' button is located below the answer field. A 'Live Chat' button is in the bottom right corner.

The consumer will be required to answer security questions to verify their identity.

# Direct Enrollment Pathway: Key Screen Shots

The screenshot shows the Wisconsin Direct Enrollment application interface. At the top, there is a navigation bar with the Wisconsin logo, the word "Apply" in a blue button, and links for "Get Results" and "Get Coverage". A "HELP" icon is in the top right. Below the navigation bar is a dark blue bar with a "Return to issuer website" link. The main content area is divided into a left sidebar and a main form area. The sidebar contains the application ID "95830247" and a progress list: "GET STARTED" (checked), "FAMILY & HOUSEHOLD" (expanded), "1 John Smith" (selected), "2 Summary", "ADDITIONAL INFORMATION", and "REVIEW & SIGN". The main form area is titled "John Smith's information" and contains a light blue informational box about the need for a Social Security number (SSN). Below this is a section titled "Enter John Smith's Social Security number" with a text input field containing "385-55-3302" and a placeholder "XXX-XX-XXXX". A question follows: "Is John Smith the same name that appears on his Social Security card?" with radio buttons for "Yes" (selected) and "No". At the bottom right of the form is a green "SAVE & CONTINUE" button, and a "Live Chat" button is in the bottom right corner of the page.

With the consumer, complete the eligibility application on the Marketplace website for the consumer.

Please note that the consumer will not set up his/her own “MyAccount” username and password through an agent or broker, but can return to the Marketplace website separately or call the Marketplace call center to set up his/her “MyAccount” username and password.

# Direct Enrollment Pathway: Key Screen Shots

- Once you have assisted the consumer with completion of the application and received the consumer's eligibility determination from the Federally-facilitated Marketplace, you will be securely redirected to the issuer's website.
- Once back on the issuer's site, compare and select a plan with the consumer.
  - Please note that through this process you will only be able to help the consumer choose among plans offered by that specific issuer. *Agents and brokers are required to disclose to consumers this enrollment path is only for plans specific to this issuer.*
- Once a plan has been selected on the Issuer site, if applicable, select the amount of the advance premium tax credit that the consumer would like to apply.
- At this point, the issuer will submit the enrollment information to the Marketplace. Your agent/broker identifying information will be included in the official Federally-facilitated Marketplace enrollment record sent to the issuer.

# Marketplace Pathway: Overview

An agent or broker can also assist consumers directly on the Federally-facilitated Marketplace website using the Marketplace pathway.

- Agents and brokers can use this pathway to help enroll qualified individuals in individual market QHP Marketplace coverage.

In the Marketplace pathway, the consumer will log directly into his or her own Marketplace account.

- The agent or broker can help *the consumer* as the consumer completes the application and plan selection processes using the Marketplace website. (Note that the agent/broker does not log in with their agent/broker FFM user ID; the consumer will log in directly, using the consumer's FFM user ID.)

# Marketplace Pathway: Key Screen Shots

The screenshot shows the HealthCare.gov website interface. At the top, the logo 'HealthCare.gov' is on the left, and navigation links 'Learn' and 'Get Insurance' are in the center. On the right, there is a user profile 'Earl' with a 'Logout' link and a language selector 'Español'. Below the navigation, a progress bar shows 'Apply' (active), 'Get Results', and 'Get Coverage'. A 'HELP' link is in the top right corner. The main content area is dark blue and features the New Jersey state logo and the text 'New Jersey application for individuals & families'. Below this, a heading reads 'You can apply for any of these people on this same application, even if they already have health insurance now:'. This is followed by a bulleted list: '• Yourself', '• Other family members', and '• Anyone on your same federal income tax return (if you file one)'. Another heading reads 'You may need:', followed by another bulleted list: '• Names, birth dates, and income information for your family' and '• Social Security numbers (if they're available) for the people who want coverage'. At the bottom of the content area, there is a green 'NEXT' button and a blue link 'Choose a different state.'

Advise the consumer to gather the appropriate documents that he or she will need to complete the application. This information can be found at: [www.healthcare.gov](http://www.healthcare.gov)

# Marketplace Pathway: Key Screen Shots

HealthCare.gov Learn Get Insurance Español

New to HealthCare.gov? CREATE ACCOUNT

**Log In**  
All fields are required unless they're marked optional.

Username

Password

[Forgot your username?](#) | [Forgot your password?](#)  
[Having trouble logging in?](#)

**Note:** If you are using a shared computer or a computer in a public place, like a library or community center, be sure you close all browser windows and tabs and log out when you're done. This will keep your information secure.

LOG IN

Live Chat

Help guide the consumer to set up his or her own Marketplace account, if they do not already have an FFM user ID.

The agent or broker can assist the consumer in creating his or her account if needed, but the consumer or a legally authorized representative must create his or her own Marketplace username and password and should not share this information with third parties, including agents and brokers.

# Marketplace Pathway: Key Screen Shots

HealthCare.gov Learn Get Insurance Earl Logout Español

Earl Parker

MY APPLICATIONS & COVERAGE

MY PROFILE

Earl, what would you like to do?

View my current applications [Apply for new coverage](#)

2014 Mississippi application for Individual & Family Coverage	Status: <b>Submitted</b> ID#: 94546790	REMOVE
2014 Tennessee application for Individual & Family Coverage	Status: <b>In progress</b> ID#: 94629493	REMOVE
2014 North Dakota application for Individual & Family Coverage	Status: <b>In progress</b> ID#: 94550203	REMOVE
2014 Louisiana application for Individual & Family Coverage	Status: <b>Complete</b> ID#: 94546944	

**Need to find your application?** If you applied for coverage with a paper application or over the phone, you can take the next steps online and shop for plans. [Find my existing application.](#)

Apply for new coverage

INDIVIDUALS & FAMILIES

Apply and shop for coverage for me and/or my family

Live Chat

The consumer will have a choice of continuing an existing application OR starting a new application (i.e. “applying for new coverage.”)

# Marketplace Pathway: Key Screen Shots

New Jersey **Apply** Get Results Get Coverage **HELP**

- GET STARTED
  - Privacy policy
  - 2 Contact information**
  - 3 Help applying for coverage
  - 4 Help paying for coverage
  - 5 Who needs coverage
- FAMILY & HOUSEHOLD
- ADDITIONAL INFORMATION
- REVIEW & SIGN

## Contact information

**Earl Parker** [UPDATE NAME](#)  
**6321 Washington St**  
**Denver, CO 80216**

Is this your home address?

Yes  
 No

Is 6186282537 your preferred number?

Yes  
 No

Phone type *optional*  
Select... ▾

Preferred spoken language *optional* Preferred written language *optional*  
English ▾ English ▾

The consumer will be asked to verify / submit their contact information.

# Marketplace Pathway: Key Screen Shots

The screenshot shows the 'New Jersey' Marketplace application interface. At the top, there are navigation tabs: 'New Jersey', 'Apply' (active), 'Get Results', and 'Get Coverage'. A 'HELP' icon is in the top right. The application ID is 95161648. A left sidebar contains a progress list: 'GET STARTED', 'Privacy policy', 'Contact information', '3 Help applying for coverage' (highlighted), '4 Help paying for coverage', and '5 Who needs coverage'. Below this are sections for 'FAMILY & HOUSEHOLD', 'ADDITIONAL INFORMATION', and 'REVIEW & SIGN'. The main content area is titled 'Help applying for coverage' and asks 'Tell us if you're getting help from one of these people'. It has radio buttons for 'Navigator', 'Certified application counselor', 'Non-Navigator assistance personnel', 'Agent or broker' (selected), and 'None of these people'. Below are input fields for 'First name', 'Middle optional', 'Last name', and 'Suffix optional' (a dropdown menu). Further down are fields for 'Organization name optional' and 'ID number optional'. At the bottom are fields for 'FFM User ID optional' and 'NPN number'. A green 'SAVE & CONTINUE' button is at the bottom right, and a 'Live Chat' button is in the bottom right corner.

The consumer will be prompted to enter your agent/broker FFM user ID and NPN on the application, to indicate that an agent or broker assisted him or her. You should provide this information to the consumer and help ensure that the consumer correctly fills in this information on this screen.  
***A correct NPN is required for issuers' compensation purposes.***

# Marketplace Pathway: Key Screen Shots

The screenshot displays the New Jersey Marketplace application interface. At the top, the navigation bar includes the New Jersey logo, the 'Apply' step (highlighted), 'Get Results', and 'Get Coverage'. A 'HELP' icon is visible in the top right. Below the navigation, the application ID '95161648' is shown next to an 'EDIT' button. A left-hand menu lists various steps: 'GET STARTED', 'Privacy policy', 'Contact information', '3 Help applying for coverage' (the current step), '4 Help paying for coverage', and '5 Who needs coverage'. Below this, there are sections for 'FAMILY & HOUSEHOLD', 'ADDITIONAL INFORMATION', and 'REVIEW & SIGN'. The main content area features a light blue notification box stating, 'You've told us another person is helping you complete the application.' Below this, a bold instruction reads: 'We need to make sure that only people who have your permission are viewing the application. Enter a security response. Choose only information that you'll know.' The form includes a 'Question 1' dropdown menu with 'Select...' and a 'Answer 1' text input field. A green 'SAVE & CONTINUE' button is positioned at the bottom right of the form area.

The consumer will be required to answer security questions to verify his or her identity.

# Marketplace Pathway: Key Screen Shots

The screenshot displays the 'Application details' page for a 2014 application for Individuals & Families (ID#: 94547639). The page is titled 'Application details' and includes a sub-header 'Here's your current application information:'. The status is 'Complete' with ID#: 94547639. The main content area contains the following text: 'Your application is complete' followed by 'Your Marketplace application is complete and has been processed. View your eligibility results to find out if you can enroll in health coverage.' Below this, there are two green buttons: 'VIEW ELIGIBILITY RESULTS' and 'REMOVE MY APPLICATION'. A section titled 'Qualified Health Plan eligibility' states: 'You have unresolved inconsistencies. You need to provide additional documentation.' Below this, there is a light blue button labeled 'Verify Greenwich's yearly income' and a green button labeled 'VERIFY'. The left sidebar contains a navigation menu with options: 'My plans & programs', 'Eligibility & appeals', 'Applications details' (highlighted), 'Report a life change', 'Communication preferences', and 'Authorized users'. The top navigation bar includes the New Jersey logo and a 'HELP' link. A 'Live Chat' button is visible in the bottom right corner.

Application complete page:  
This shows that the application is completed.

# Marketplace Pathway: Key Screen Shots

The screenshot shows the HealthCare.gov website interface. At the top left is the 'HealthCare.gov' logo. To its right are navigation links for 'Learn' and 'Get Insurance'. Further right, a user profile for 'Earl' is shown with a 'Logout' link and a 'Español' language toggle. Below the main navigation, a dark blue header contains the 'New Jersey' logo and a progress bar with three steps: 'Apply' (checked), 'Get Results' (active), and 'Get Coverage'. A 'HELP' link is visible on the right. The main content area features the heading 'Eligibility results' with a sub-link 'Learn more about your eligibility results'. Below this, it states 'Results based on your application (ID 94547639) submitted on 2013-09-25' and 'Your application was received and has been processed.' A white callout box contains the message 'Your detailed eligibility results are ready' and an 'Important' note: 'Read your eligibility results before you enroll. We'll let you know if there are problems with your application that you'll need to resolve.' Two green buttons are provided: 'VIEW ELIGIBILITY RESULTS' and 'CONTINUE TO ENROLLMENT'. A 'Live Chat' icon is in the bottom right corner.

The consumer will receive an eligibility determination; please have the consumer print their eligibility results for his or her records.

# Marketplace Pathway: Key Screen Shots

HealthCare.gov Learn Get Insurance Earl | Logout Español

Application Eligibility Results Enroll HELP

## Enroll To-Do List

**You're not enrolled yet.**

You must complete each step in order to enroll. Work at your own pace. You can come back to complete these tasks later.

**Warning:** Review your **Application Details** in your Marketplace account to resolve any outstanding issues with your application. Issues with your application must be resolved to keep your coverage.

Set premium tax credit usage (Greenwich and Eleanor) <a href="#">Explain this task</a>	SET
Answer questions about your household. <a href="#">Explain this task</a>	LOCKED
Select a health insurance plan <a href="#">Explain this task</a>	LOCKED

Live Chat

If determined eligible, have the consumer use the plan shopping feature on Healthcare.gov. You can assist the consumer in comparing qualified health plans (QHPs) on the Marketplace website and submitting the consumer's selection.

# Marketplace Pathway: Key Screen Shots

HealthCare.gov Learn Get Insurance Earl Logout Español

Louisiana HELP

2014 application for Individuals & Families (ID#: 94546944) View all applications

- My plans & programs
- Eligibility & appeals
- Applications details
- Report a life change
- Communication preferences
- Authorized users

**MY COVERAGE**

**My plans & programs**

**Starmount Life Insurance Company AlwaysCare AllStar Family Dental Plan**  
Rich  
Status: Initial enrollment

**Starmount Life Insurance Company AlwaysCare AllStar Family Dental Plan**  
Mike  
Status: Initial enrollment

**HMO Louisiana, Inc. Blue POS 70/50 \$4500**  
Mike  
Status: Initial enrollment

**Starmount Life Insurance Company AlwaysCare AllStar Family Dental**

**PREMIUM TAX CREDIT**

**Premium tax credit usage**  
Helen, Rich, Johnrichard and Mike

Using: \$0per month Eligible for: \$0per month

Live Chat

The consumer will be asked to verify the accuracy of their plan enrollment information, and the APTC applied.

# Other Useful Tips: 403 Login Errors

**Question: When I log in, I see a 403 error. What should I do?**

**Answer:**

- A 403 error typically occurs when an agent is attempting to login directly to healthcare.gov. (As an agent/broker, you cannot log in directly to healthcare.gov on behalf of the consumer. Only consumers can log in directly to healthcare.gov.)
- As part of the direct enrollment process, agents/brokers can login to healthcare.gov's agent/broker landing page after they have been redirected there from an issuer or web-broker's platform.
- If you are affiliated with either an issuer that supports direct enrollment or with a web-broker, you must log onto the issuer's/web-broker's portal first. You will then be redirected to the agent/broker landing page on healthcare.gov.
- If you are not affiliated with an issuer that supports direct enrollment, then use the Marketplace pathway described earlier.

# Other Useful Tips: Other Login Errors

**Question:** I am registered with the FFM, but I cannot login after I am redirected to healthcare.gov's agent/broker landing page. What should I do?

**Answer:** In some cases, an agent might get 403 error when logging into the Marketplace. A 403 error typically occurs when an agent is attempting to login directly to healthcare.gov. (As an agent/broker, you cannot log in directly to healthcare.gov on behalf of the consumer. Only consumers can log in directly to healthcare.gov.)

As part of the direct enrollment process, agents/brokers can login to healthcare.gov's agent/broker landing page after they have been redirected there from an issuer or web-broker's platform. If you are affiliated with either an issuer that supports direct enrollment or with a web-broker, you must log onto the issuer's/web-broker's portal first. You will then be redirected to the agent/broker landing page on healthcare.gov. If you are not affiliated with an issuer that supports direct enrollment, then use the Marketplace pathway and have your client log-in directly to Healthcare.gov. You can help your client complete the process as your client completes the application and plan selection processes using the Marketplace website.

*continued on next slide*

# Other Useful Tips: Other Login Errors

Many of the login errors that occur on the agent/broker landing page on the healthcare.gov site can be resolved by one of the following actions:

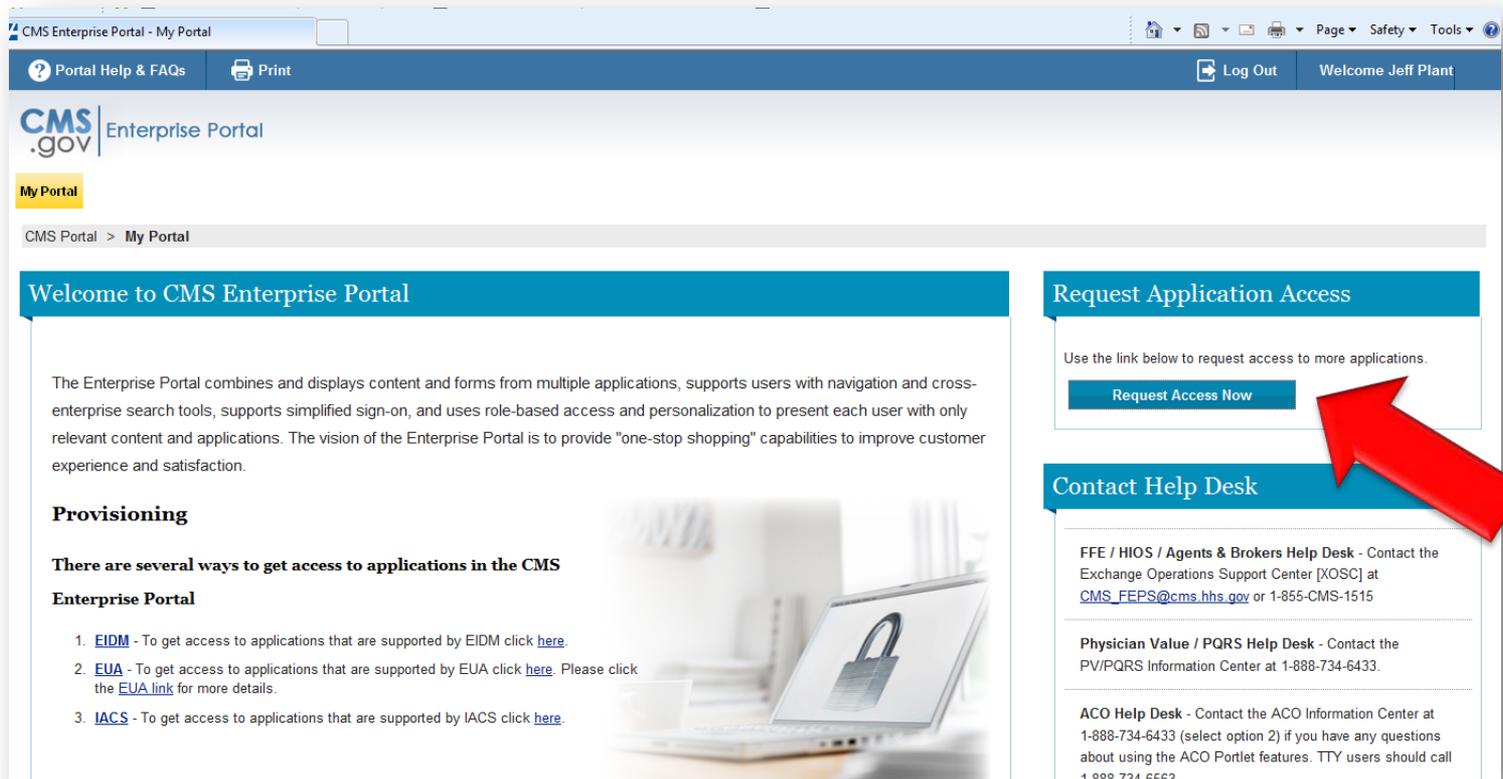
1. Check to see that your password is current. CMS passwords expire every 60 days, so you may need to reset your password on the CMS Enterprise Portal, where you created your FFM account. (<https://portal.cms.gov>)
2. Make sure your CMS Enterprise Portal account is provisioned for the agent/broker role. (Consumer accounts cannot be used to log in to the agent/broker landing page; only agent/broker accounts can log in to the agent/broker landing page.)
  1. Access the CMS Enterprise Portal by navigating to <https://portal.cms.gov>.
  2. Click “Login to CMS Secure Portal” on the right side of the page.
  3. Click “I Accept” on the Terms and Conditions page.
  4. Enter your User ID and Password, then Click “Log In.”
    - *Note that your Password is case-sensitive. Your User ID is not.*
  5. Click “Request Access Now” on the right side of the page, under the “Request Application Access” heading (**see screenshot on slide 28 of this presentation**).
  6. On the following page, “Federally Facilitated Marketplace” will appear in the Application table, under the “View and Manage My Access” heading, for users who have the Agent/Broker role (**see screenshot on slide 29 of this presentation**).

If “FFM Agent Broker” role does not exist for your account, then you should return to Step 8 of Part II. You will need to complete the remaining steps of the Part II process to finish the FFM registration process and activate your FFM account with the agent/broker role. (See Step 8, Part II, in the instructions posted at <http://www.cms.gov/CCIIO/Programs-and-Initiatives/Health-Insurance-Marketplaces/Downloads/agent-broker-registration-webinar.pdf>)

# Other Useful Tips: Other Login Errors

## Verifying Agent/Broker Role on CMS Enterprise Portal

- Step 5: Click “Request Access Now” on the right side of the page, under the “Request Application Access” heading



The screenshot displays the CMS Enterprise Portal interface. At the top, there is a navigation bar with links for 'Portal Help & FAQs', 'Print', 'Log Out', and 'Welcome Jeff Plant'. The main content area is titled 'Welcome to CMS Enterprise Portal' and includes a paragraph about the portal's features. Below this, there is a 'Request Application Access' section with a 'Request Access Now' button. A red arrow points to this button. To the right of the main content, there is a 'Contact Help Desk' section with contact information for various support centers.

**Welcome to CMS Enterprise Portal**

The Enterprise Portal combines and displays content and forms from multiple applications, supports users with navigation and cross-enterprise search tools, supports simplified sign-on, and uses role-based access and personalization to present each user with only relevant content and applications. The vision of the Enterprise Portal is to provide "one-stop shopping" capabilities to improve customer experience and satisfaction.

**Provisioning**

**There are several ways to get access to applications in the CMS Enterprise Portal**

1. [EIDM](#) - To get access to applications that are supported by EIDM click [here](#).
2. [EUA](#) - To get access to applications that are supported by EUA click [here](#). Please click the [EUA link](#) for more details.
3. [IACS](#) - To get access to applications that are supported by IACS click [here](#).

**Request Application Access**

Use the link below to request access to more applications.

[Request Access Now](#)

**Contact Help Desk**

**FFE / HIOS / Agents & Brokers Help Desk** - Contact the Exchange Operations Support Center [XOSC] at [CMS\\_FEPS@cms.hhs.gov](mailto:CMS_FEPS@cms.hhs.gov) or 1-855-CMS-1515

**Physician Value / PQRS Help Desk** - Contact the PV/PQRS Information Center at 1-888-734-6433.

**ACO Help Desk** - Contact the ACO Information Center at 1-888-734-6433 (select option 2) if you have any questions about using the ACO Portlet features. TTY users should call 1-888-734-6563

# Other Useful Tips: Other Login Errors

## Verifying Agent/Broker Role on CMS Enterprise Portal cont.

- Step 6: “Federally Facilitated Marketplace” will appear in the Application table, under the “View and Manage My Access” heading, for users who have the Agent/Broker role

The screenshot shows the CMS Enterprise Portal interface. At the top, there is a navigation bar with 'Portal Help & FAQs' and 'Print'. Below that is the CMS logo and 'Enterprise Portal'. The main content area is titled 'My Access' and contains a sub-section 'View and Manage My Access'. This section includes a table with the following data:

Application	Take An Action
Federally Facilitated Marketplace	<a href="#">Add a Role</a> <a href="#">Remove a Role</a>

A large red arrow points to the 'Federally Facilitated Marketplace' row in the table.

If “FFM Agent Broker” role does not exist for your account, then you should return to Step 8 of Part II. You will need to complete the remaining steps of the Part II process to finish the FFM registration process and activate your FFM account with the agent/broker role. (See Step 8, Part II, in the instructions posted at <http://www.cms.gov/CCIIO/Programs-and-Initiatives/Health-Insurance-Marketplaces/Downloads/agent-broker-registration-webinar.pdf>)

# Other Useful Tips: Receiving credit for an enrollment

**Question: When using the Marketplace pathway, how can I ensure that I will get credit for the enrollment?**

**Answer:**

- Make sure that when the consumer completes the application, they enter your the NPN on “Help Applying for Coverage” screen.
  - Have the consumer select “agent or broker” in response to the question, “Tell us if you’re getting help from one of these people”
  - Have the consumer enter your name and NPN in the appropriate fields.
  - **BE SURE THAT THE CONSUMER ENTERS YOUR NPN CORRECTLY.**

# Other Useful Tips:

## Enrolling if the FFM website is not available

**Question: How can I enroll a consumer via the Marketplace pathway, if the Marketplace website is not available?**

### **Answer:**

- Arrange a 3-way call between yourself, the consumer and the Federally-facilitated Marketplace Call Center (1-800-318-2596) to fill out the application over the phone, receive an eligibility determination and choose a plan. The consumer must be on the phone with the agent or broker and Call Center representative to complete an application and/or make a plan selection. The Call Center will record the agent's information when the agent and consumer conduct a 3-way call with the Call Center.

# Concluding Notes

- The screen shots in this document depict key screens for agent/broker assistance during enrollment. These screen shots do not depict every possible screen during the consumer enrollment process.
- This content will be updated, as needed.
- CMS is continually working to enhance the agent/broker experience on the FFMs. Please see the following page for additional resources that may help you.

# Resources

## **Resources for Agents and Brokers in the Health Insurance Marketplace**

Available at: <http://www.cms.gov/CCIIO/Programs-and-Initiatives/Health-Insurance-Marketplaces/a-b-resources.html>

## **The Role of Agents, Brokers, and Web-brokers in Health Insurance Marketplaces**

Available at: <http://www.cms.gov/CCIIO/Resources/Regulations-and-Guidance/index.html#Affordable-Insurance-Exchanges>

## **Helping Consumers Complete an Enrollment Starting December 1st: Tips for Agents and Brokers**

Available at: <http://www.cms.gov/CCIIO/Programs-and-Initiatives/Health-Insurance-Marketplaces/Downloads/agent-broker-consumer-tips-12-1-2013.pdf>

## **General CCIIO Resources**

Available at: <http://www.cms.gov/CCIIO/Resources/Fact-Sheets-and-FAQs/index.html>

## **Healthcare.gov**

Available at: <https://healthcare.gov> and <https://healthcare.gov/small-businesses>

**FFM Producer-Assister Helpdesk:** [FFMProducer-AssisterHelpDesk@cms.hhs.gov](mailto:FFMProducer-AssisterHelpDesk@cms.hhs.gov)