Agent and Broker Federally-facilitated Marketplace (FFM) Registration

A Walk Through of Registration Steps

2015 Plan Year Registration

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

Purpose and Audience

Purpose: To present the registration process for agents and brokers, including web-brokers, wishing to assist consumers in the Federally-facilitated Marketplace (FFM)*

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

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

FFM Agent and Broker Registration Overview

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

	Part I	Part II
	Training and Agreements on the Medicare Learning Network® (MLN)	**Creation of an FFM User Account and Identity Proofing**
Website:	**Medicare Learning Network®:** https://Marketplace.MedicareLearningNetworkLMS.com	**CMS Enterprise Portal:** https://portal.cms.gov
Key Actions:	▸ Create an account on the MLN ▸ Select the agent/broker role for the desired market ▸ Complete the training curriculum for the desired market, including the applicable FFM Agreement(s)	▸ Create an FFM user account ▸ Request the agent/broker role ▸ Complete identity proofing

Registration Requirements for Agents and Brokers Who are NEW to the FFM

Agents and brokers participating in the…	Initial FFM Registration Activities			
	Part I			Part II
	Create an Account on MLN	**Complete the FFM Training**	**Execute FFM Agreement(s)**	**Create an FFM User Account and Complete Identity Proofing on the CMS Enterprise Portal**
• FFM for the individual market and FF-SHOP	Required	Required: Basics, P&S, IM Recommended: SHOP	Required: GA, P&S IM, P&S SHOP	Required
• FFM for the individual market	Required	Required: Basics, P&S, IM	Required: GA, P&S IM	Required
• FF-SHOP	Required	Recommended: Basics, P&S, SHOP	Required: P&S SHOP	Required

TRAINING & AGREEMENTS:

Basics	Affordable Care Act and Marketplace Basics Course & Exam
P&S	Privacy and Security Standards Course & Exam – **NEW for Plan Year 2015**
IM	Individual Marketplace Course & Exam
SHOP	SHOP Marketplace Course & Exam
GA	Agent Broker General Agreement for the FFM Individual Market
P&S IM	Agreement Between Agent or Broker and CMS for the FFM Individual Market
P&S SHOP	Agreement Between Agents and Brokers and CMS for the FF-SHOP

Registration Requirements for Agents and Brokers Who are RENEWING with the FFM

Agents and brokers renewing their participation in the…	Annual FFM Registration Activities — Part I: Log in to MLN using existing MLN User ID	Part I: Complete the FFM Training	Part I: Execute FFM Agreement(s)	Part II: Create an FFM User Account and Complete Identity Proofing on the CMS Enterprise Portal
• FFM for the individual market and FF-SHOP	Required	Required: Basics, P&S, IM Recommended: SHOP	Required: GA, P&S IM, P&S SHOP	No activity required
• FFM for the individual market	Required	Required: Basics, P&S, IM	Required: GA, P&S IM	No activity required
• FF-SHOP	Required	Recommended: Basics, P&S, SHOP	Required: P&S SHOP	Required (*Note: Agents and brokers who did not complete this requirement as part of the registration for the 2014 plan year must do so as part of registration for the 2015 plan year.*)

TRAINING & AGREEMENTS:

	Basics	Affordable Care Act and Marketplace Basics Course & Exam
	P&S	Privacy and Security Standards Course & Exam – **NEW for Plan Year 2015**
	IM	Individual Marketplace Course & Exam
	SHOP	SHOP Marketplace Course & Exam
	GA	Agent Broker General Agreement for the FFM Individual Market
	P&S IM	Agreement Between Agent or Broker and CMS for the FFM Individual Market
	P&S SHOP	Agreement Between Agents and Brokers and CMS for the FF-SHOP

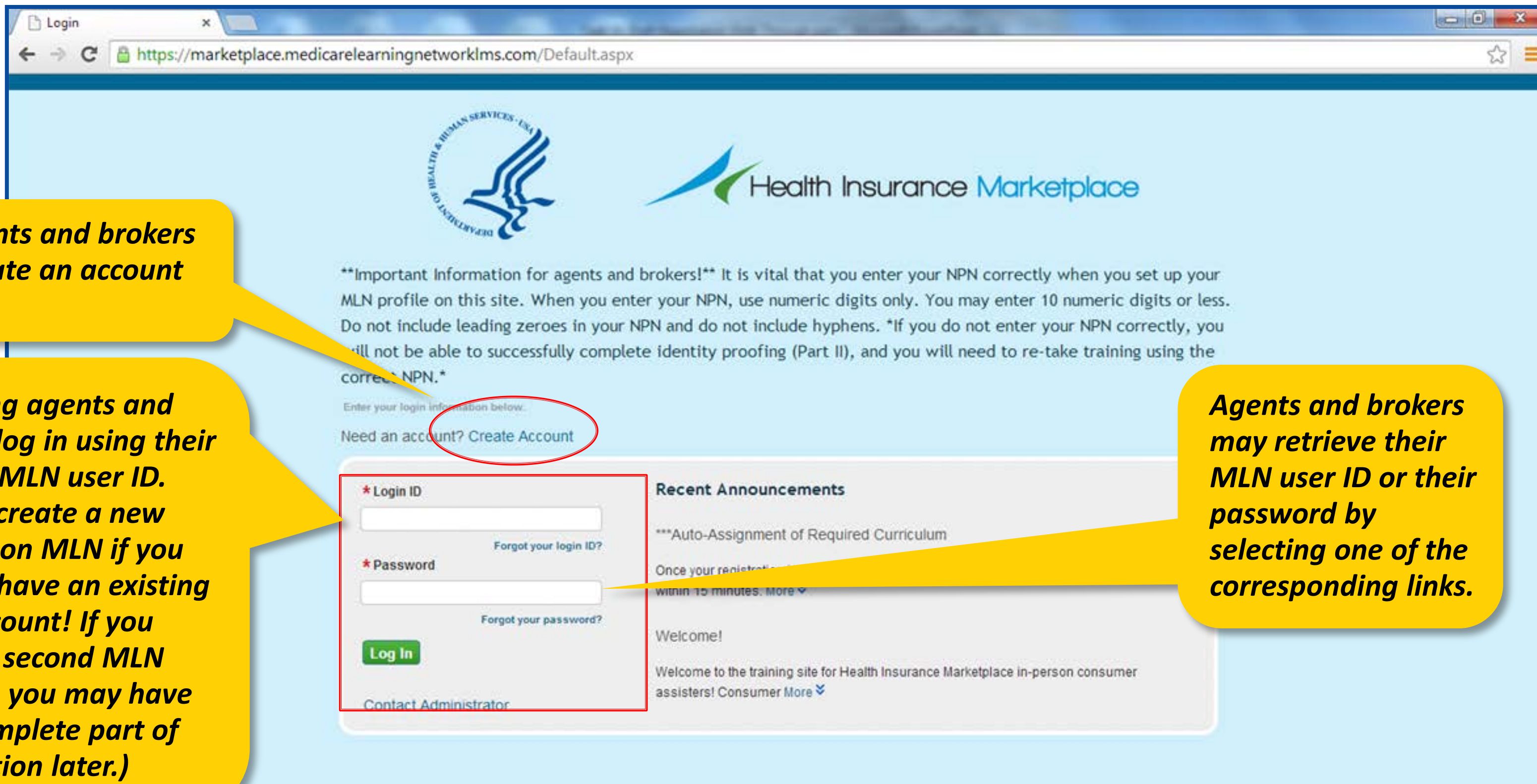
CENTERS FOR MEDICARE & MEDICAID SERVICES

Agent and Broker Federally-facilitated Marketplace (FFM) Registration

Part I: Training and Agreements on MLN

Step 1: Create MLN Account/Log In on the MLN

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



New agents and brokers must create an account on MLN.

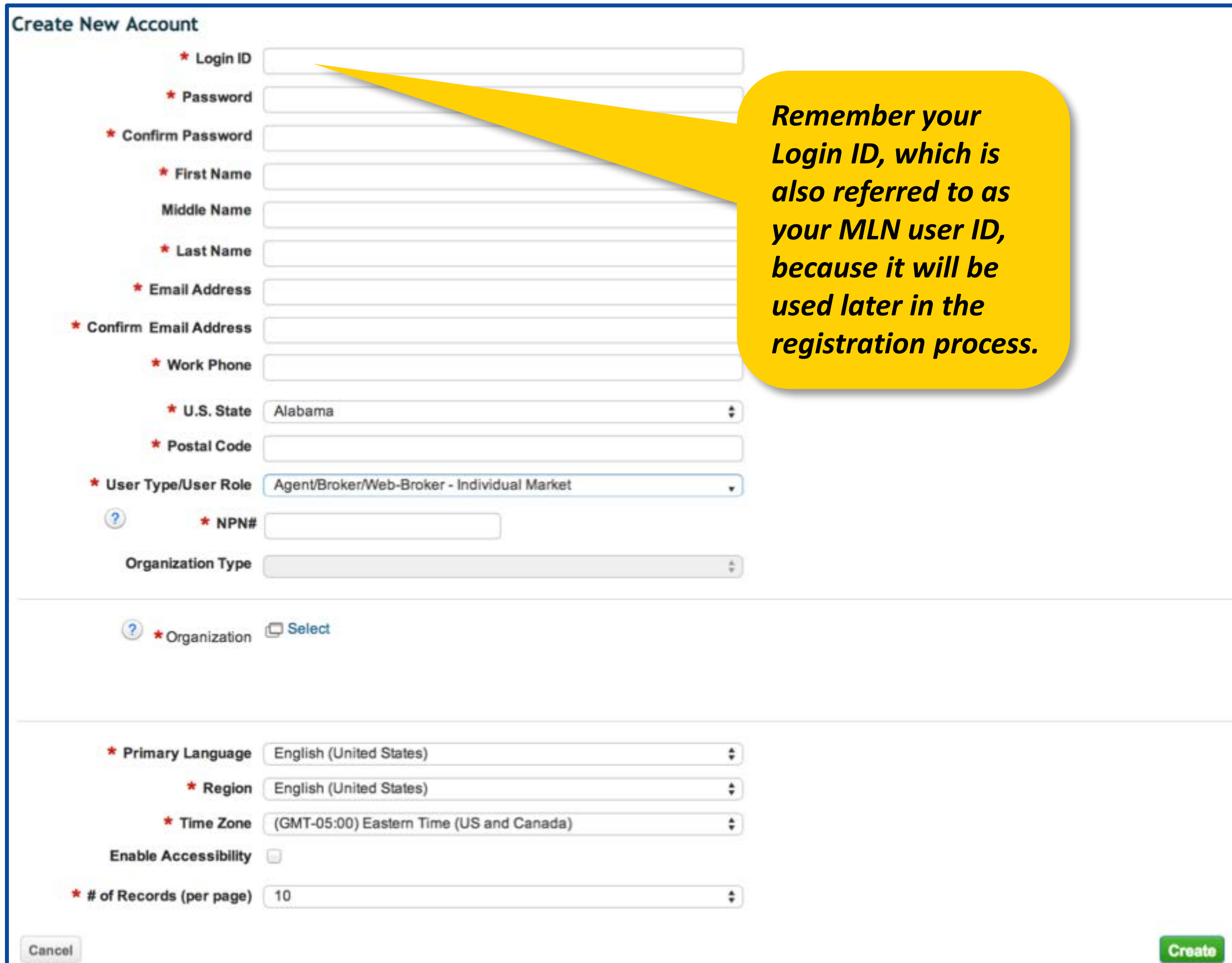
Renewing agents and brokers log in using their existing MLN user ID. (Do not create a new account on MLN if you already have an existing MLN account! If you create a second MLN account, you may have to re-complete part of registration later.)

Agents and brokers may retrieve their MLN user ID or their password by selecting one of the corresponding links.

Part I

Step 2: Create a New Account

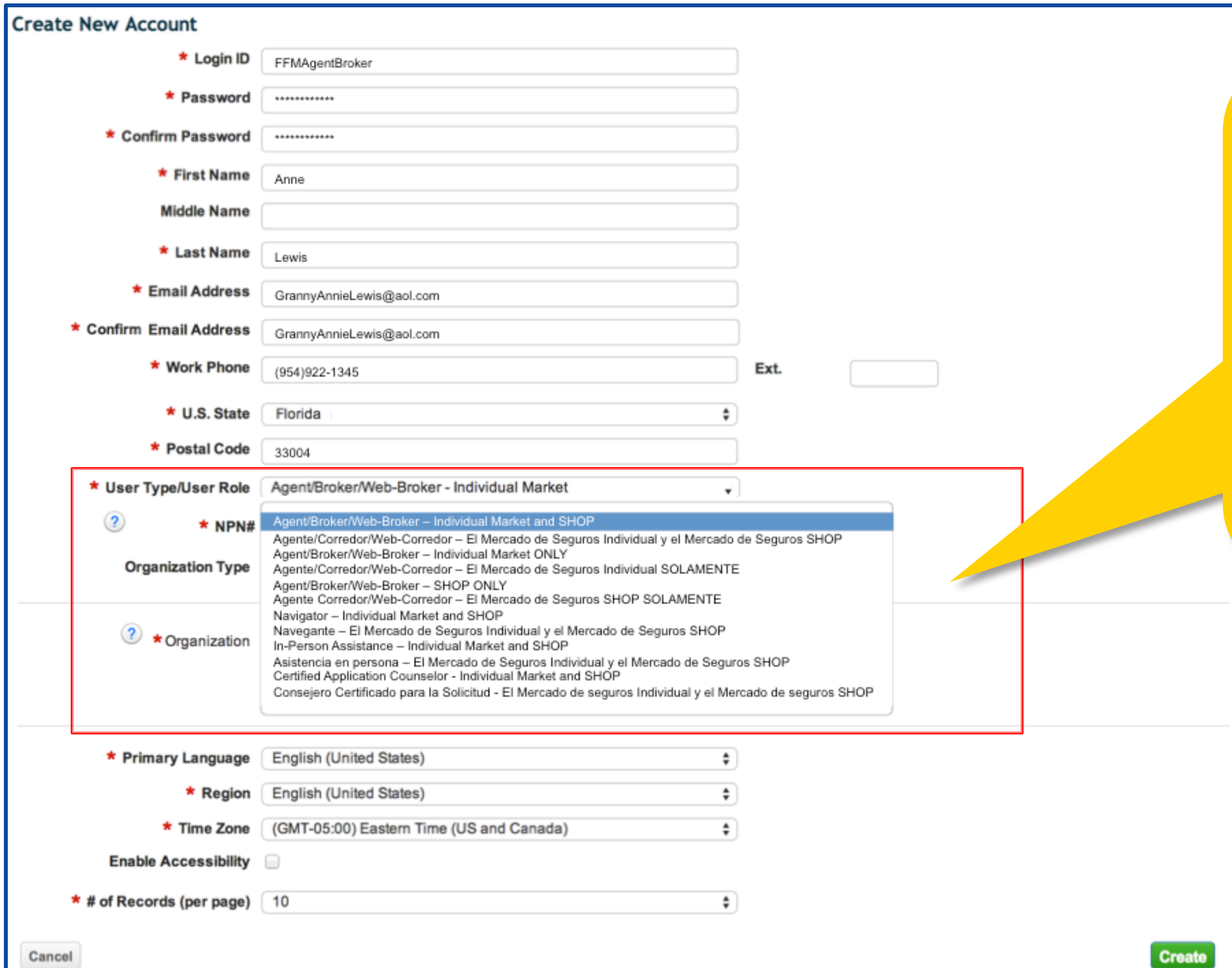
Enter your identifying information to create an account.



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

Part I

Step 2a: Select User Type/User Role


Create New Account

* Login ID: FFMAgentBroker
* Password: ••••••••••••
* Confirm Password: ••••••••••••
* First Name: Anne
Middle Name:
* Last Name: Lewis
* Email Address: GrannyAnnieLewis@aol.com
* Confirm Email Address: GrannyAnnieLewis@aol.com
* Work Phone: (954)922-1345 Ext.
* U.S. State: Florida
* Postal Code: 33004
* User Type/User Role: Agent/Broker/Web-Broker - Individual Market
* NPN#
Organization Type
* Organization

Agent/Broker/Web-Broker – Individual Market and SHOP
Agente/Corredor/Web-Corredor – El Mercado de Seguros Individual y el Mercado de Seguros SHOP
Agent/Broker/Web-Broker – Individual Market ONLY
Agente/Corredor/Web-Corredor – El Mercado de Seguros Individual SOLAMENTE
Agent/Broker/Web-Broker – SHOP ONLY
Agente Corredor/Web-Corredor – El Mercado de Seguros SHOP SOLAMENTE
Navigator – Individual Market and SHOP
Navegante – El Mercado de Seguros Individual y el Mercado de Seguros SHOP
In-Person Assistance – Individual Market and SHOP
Asistencia en persona – El Mercado de Seguros Individual y el Mercado de Seguros SHOP
Certified Application Counselor - Individual Market and SHOP
Consejero Certificado para la Solicitud - El Mercado de seguros Individual y el Mercado de seguros SHOP

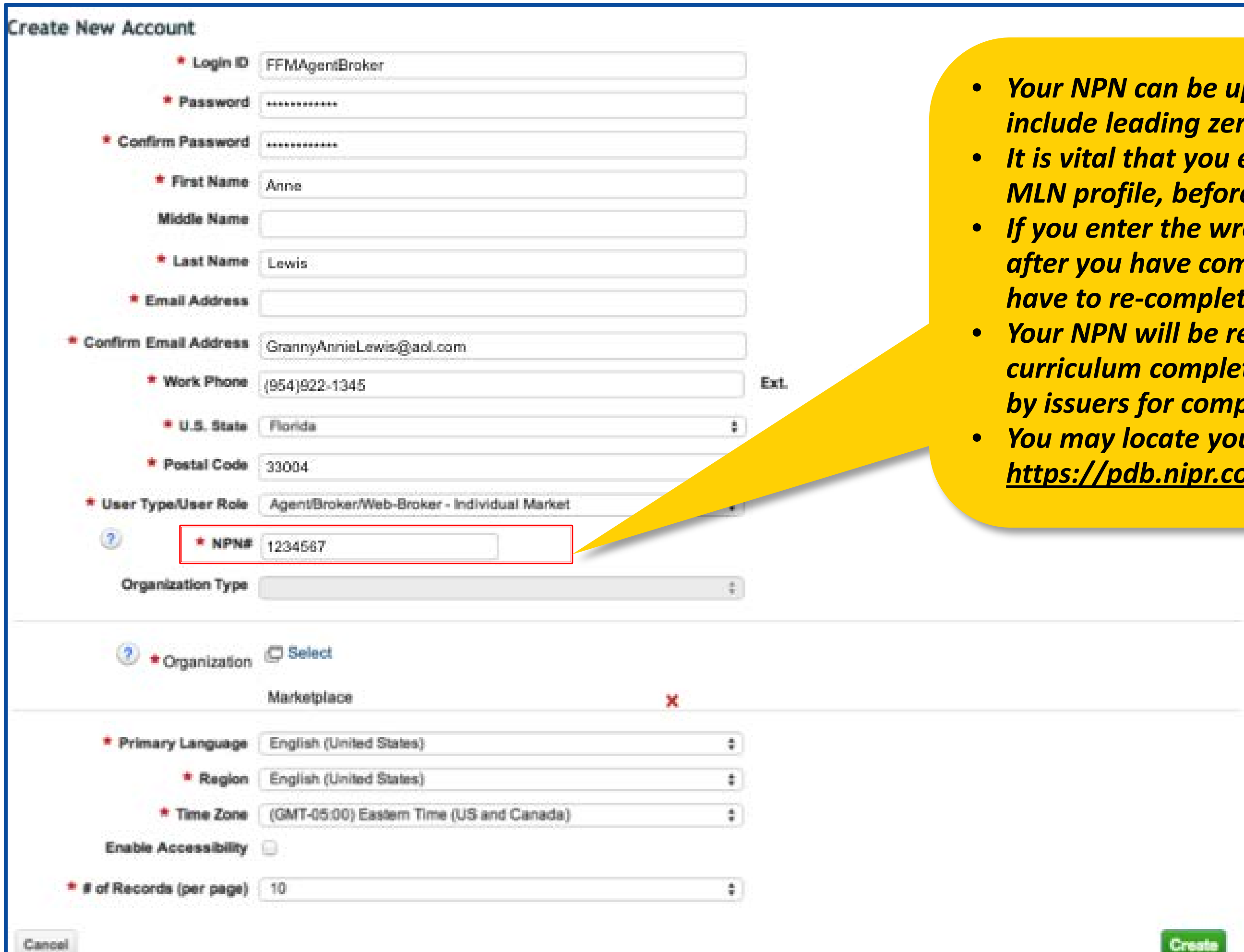
* Primary Language: English (United States)
* Region: English (United States)
* Time Zone: (GMT-05:00) Eastern Time (US and Canada)
Enable Accessibility
* # of Records (per page): 10

Cancel
Create

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

Part I

Step 2b: Enter NPN

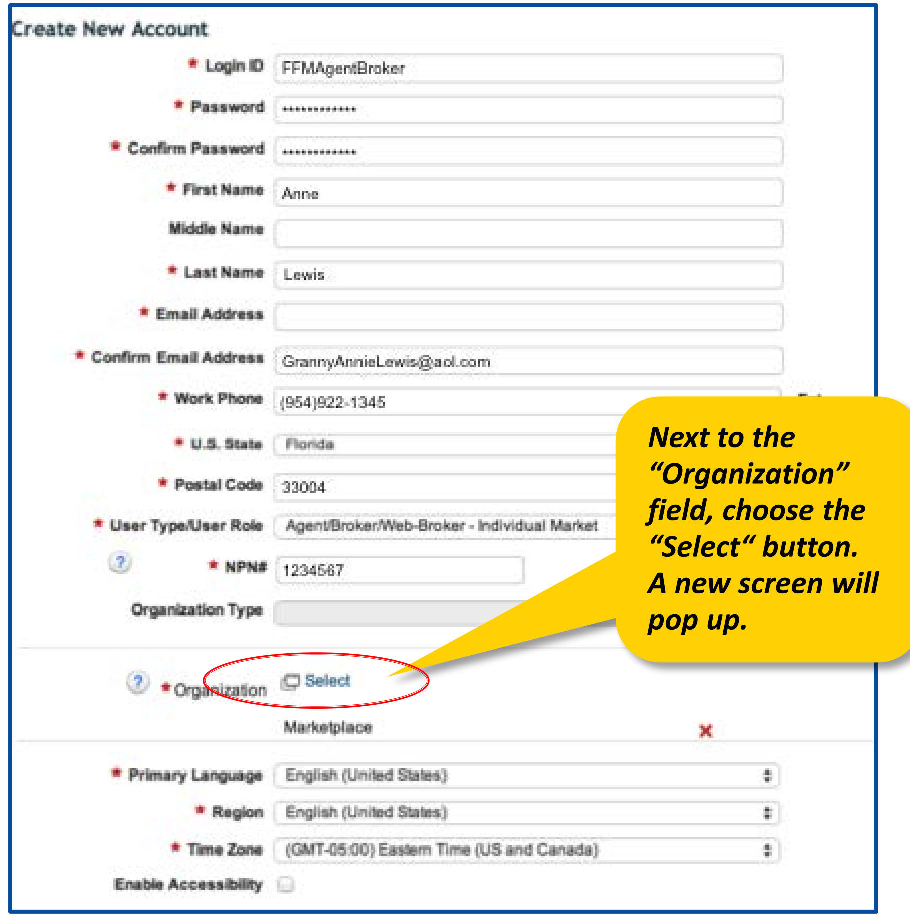


- ***Your NPN can be up to 10 digits long and does not include leading zeroes.***
- ***It is vital that you enter your NPN correctly in your MLN profile, before you complete a curriculum.***
- ***If you enter the wrong NPN and wish to correct it after you have completed a curriculum, you may have to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

Part I

Step 2c: Select Organization

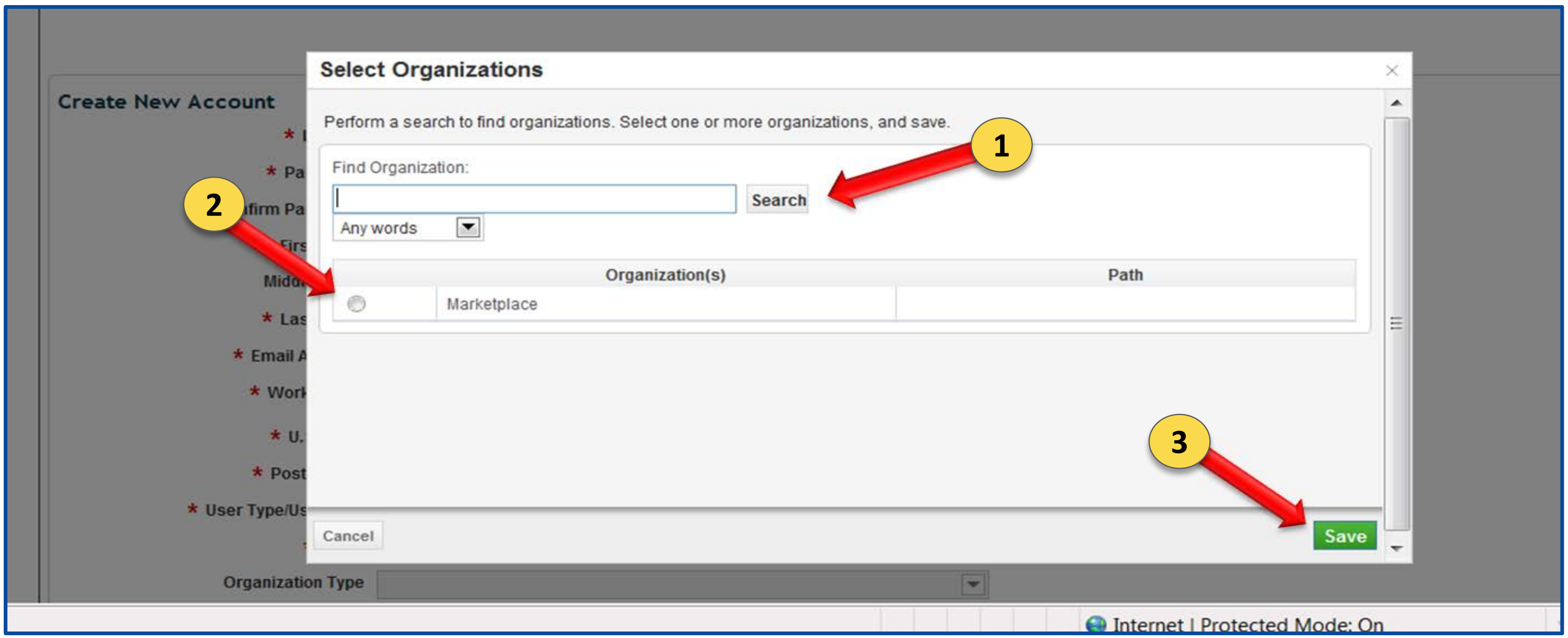
- After entering your NPN, you must make a selection in the "Organization" field.
- For the "Organization" field, choose the blue text that says "Select." A new screen will pop up.
- This should not be confused with the field labeled "Organization Type" which is automatically grayed-out; agents and brokers do not need to complete this field.



Part I

Step 2c: Select Organization, continued

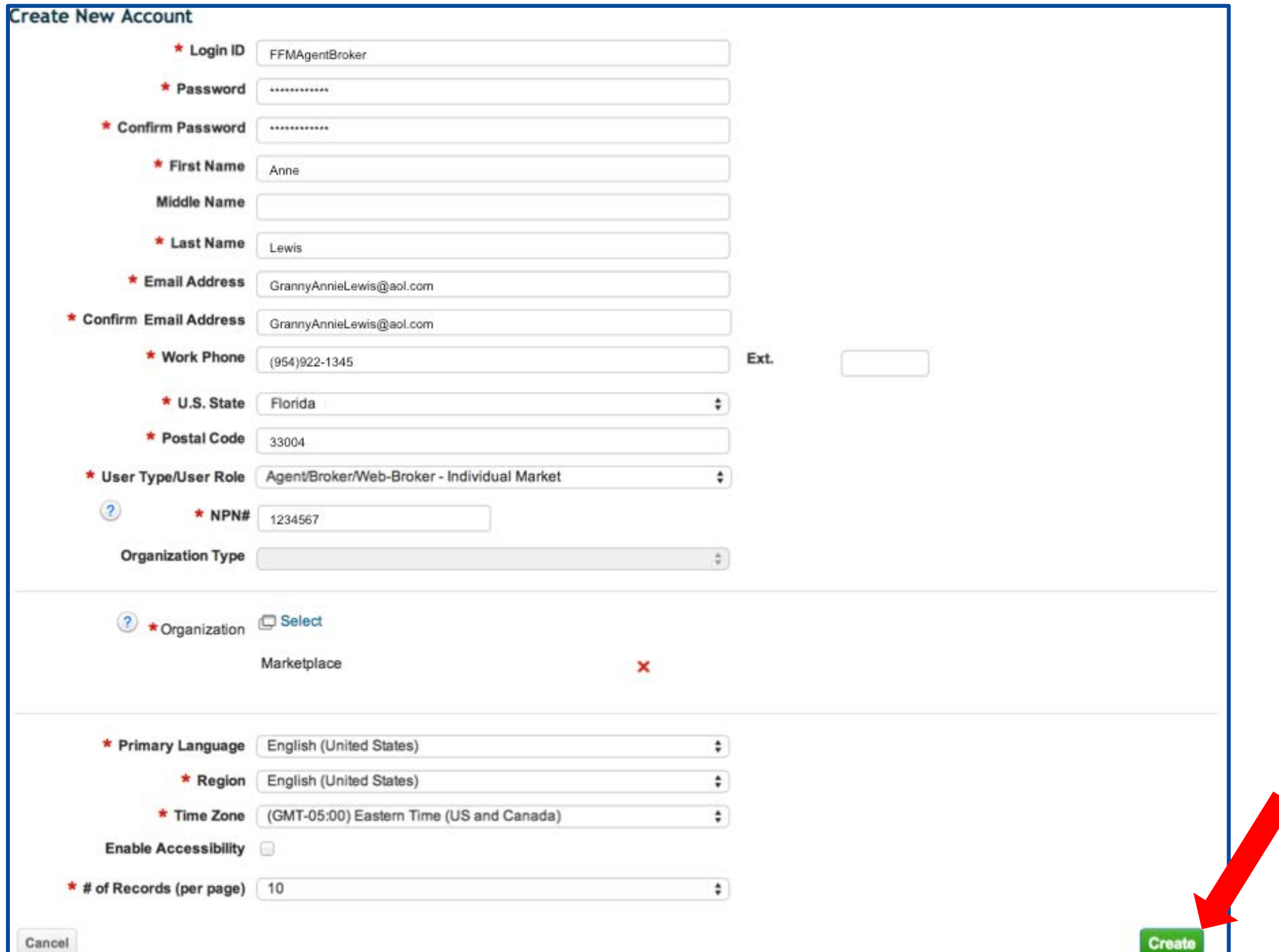
Select the gray "Search" button, and "Marketplace" will appear as the only option. Choose the radio button next to "Marketplace." Select "Save" to finish creating an MLN account.



Part I

Step 2d: Select Create Account

Once you have completed all of the fields, select “Create” to finish creating your account.


Create New Account

* Login ID	FFMAgentBroker
* Password	•••••••••••••
* Confirm Password	•••••••••••••
* First Name	Anne
Middle Name	
* Last Name	Lewis
* Email Address	GrannyAnnieLewis@aol.com
* Confirm Email Address	GrannyAnnieLewis@aol.com
* Work Phone	(954)922-1345 Ext.
* U.S. State	Florida
* Postal Code	33004
* User Type/User Role	Agent/Broker/Web-Broker - Individual Market
* NPN#	1234567
Organization Type	
* Organization	Select Marketplace
* Primary Language	English (United States)
* Region	English (United States)
* Time Zone	(GMT-05:00) Eastern Time (US and Canada)
Enable Accessibility	
* # of Records (per page)	10

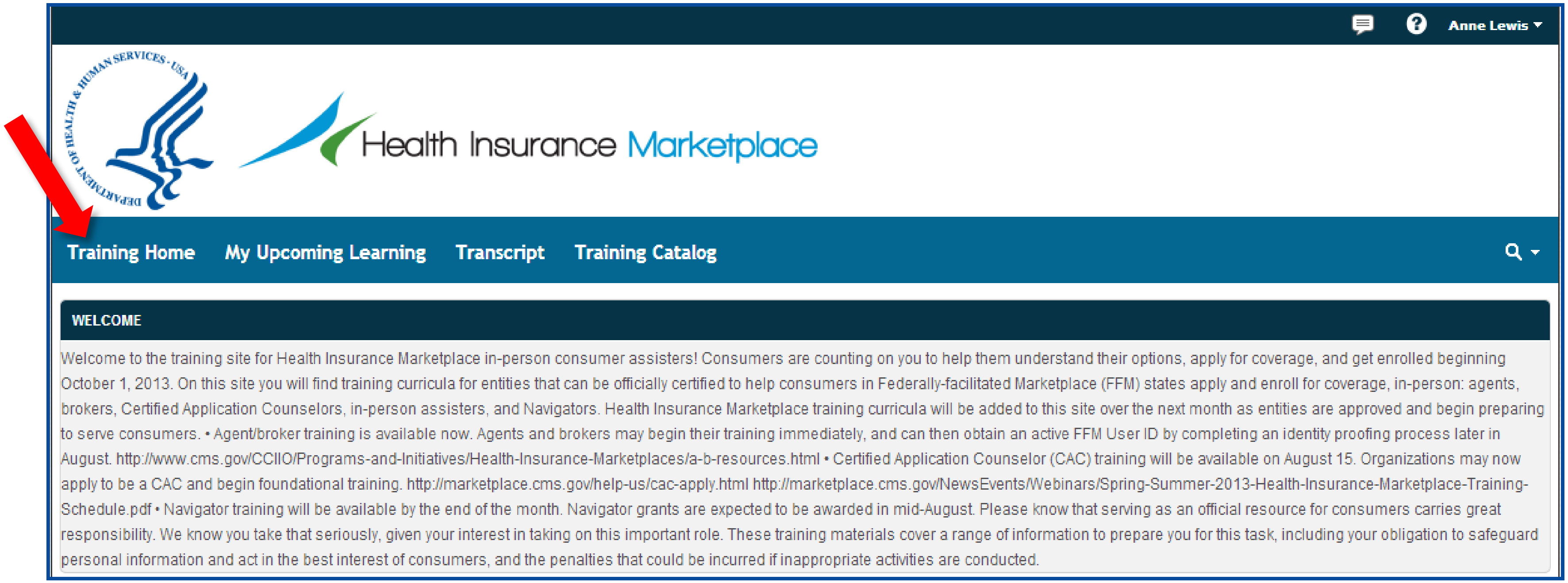
Cancel

Create

Part I

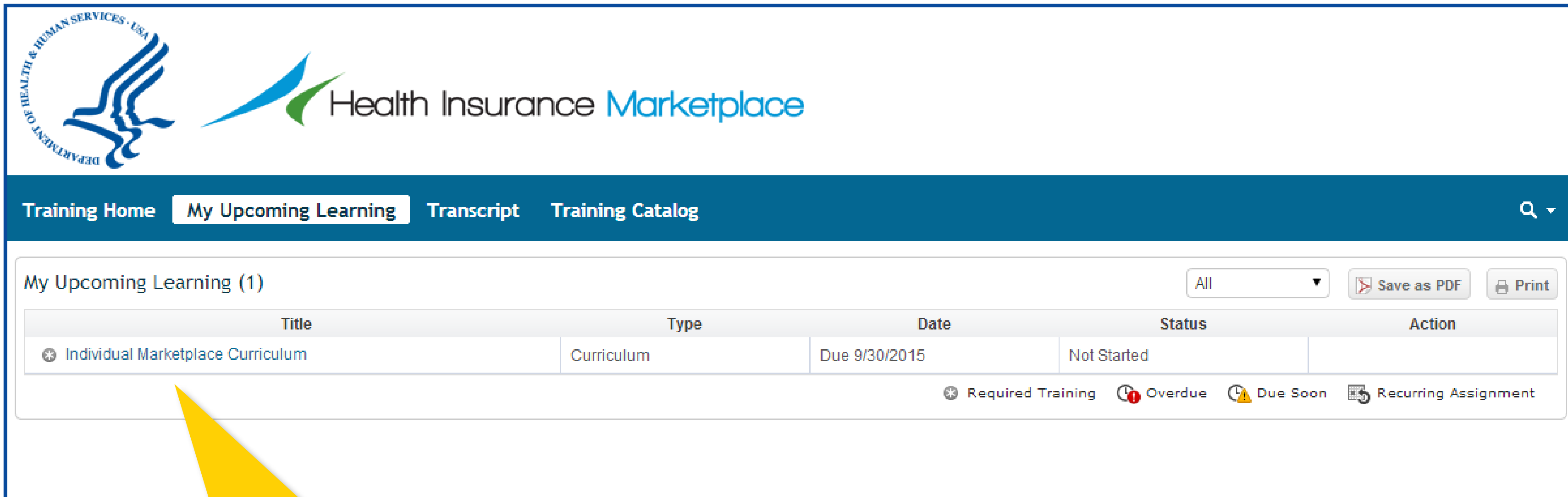
Step 3: Select “Training Home” on the Welcome Page

After you have successfully created your account, you will be taken to a “Welcome” page. Select “Training Home.”



Step 4: Select your Curriculum to View the Courses

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

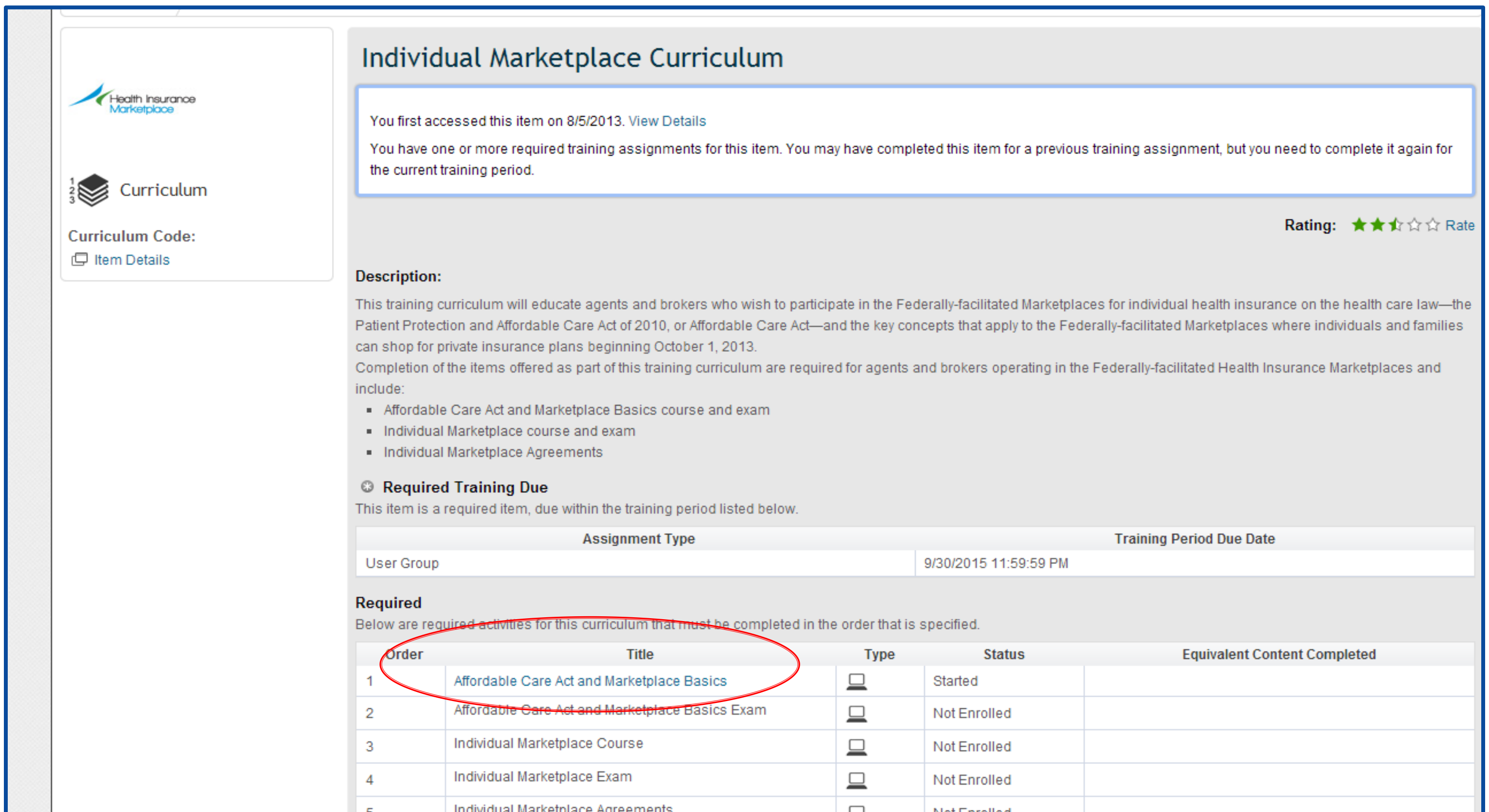


The curriculum may take up to 15 minutes to be auto-assigned.

Part I

Step 5a: Select the Title of the First Curriculum Item

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



Health Insurance Marketplace

Curriculum

Curriculum Code:

Item Details

Individual Marketplace Curriculum

You first accessed this item on 8/5/2013. View Details

You have one or more required training assignments for this item. You may have completed this item for a previous training assignment, but you need to complete it again for the current training period.

Rating: Rate

Description:

This training curriculum will educate agents and brokers who wish to participate in the Federally-facilitated Marketplaces for individual health insurance on the health care law—the Patient Protection and Affordable Care Act of 2010, or Affordable Care Act—and the key concepts that apply to the Federally-facilitated Marketplaces where individuals and families can shop for private insurance plans beginning October 1, 2013.

Completion of the items offered as part of this training curriculum are required for agents and brokers operating in the Federally-facilitated Health Insurance Marketplaces and include:

- Affordable Care Act and Marketplace Basics course and exam
- Individual Marketplace course and exam
- Individual Marketplace Agreements

Required Training Due

This item is a required item, due within the training period listed below.

Assignment Type	Training Period Due Date
User Group	9/30/2015 11:59:59 PM

Required

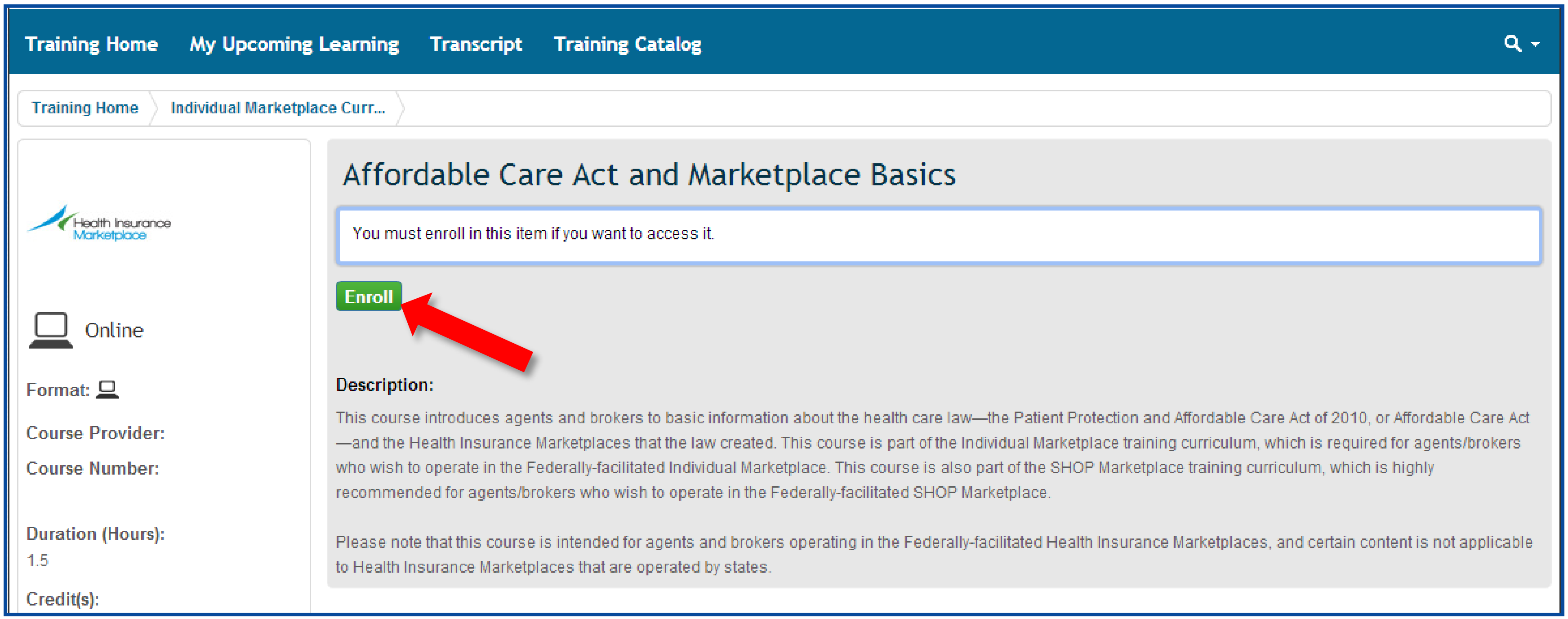
Below are required activities for this curriculum that must be completed in the order that is specified.

Order	Title	Type	Status	Equivalent Content Completed
1	Affordable Care Act and Marketplace Basics		Started	
2	Affordable Care Act and Marketplace Basics Exam		Not Enrolled	
3	Individual Marketplace Course		Not Enrolled	
4	Individual Marketplace Exam		Not Enrolled	
5	Individual Marketplace Agreements		Not Enrolled	

Part I

Step 5b: Enroll in a Course

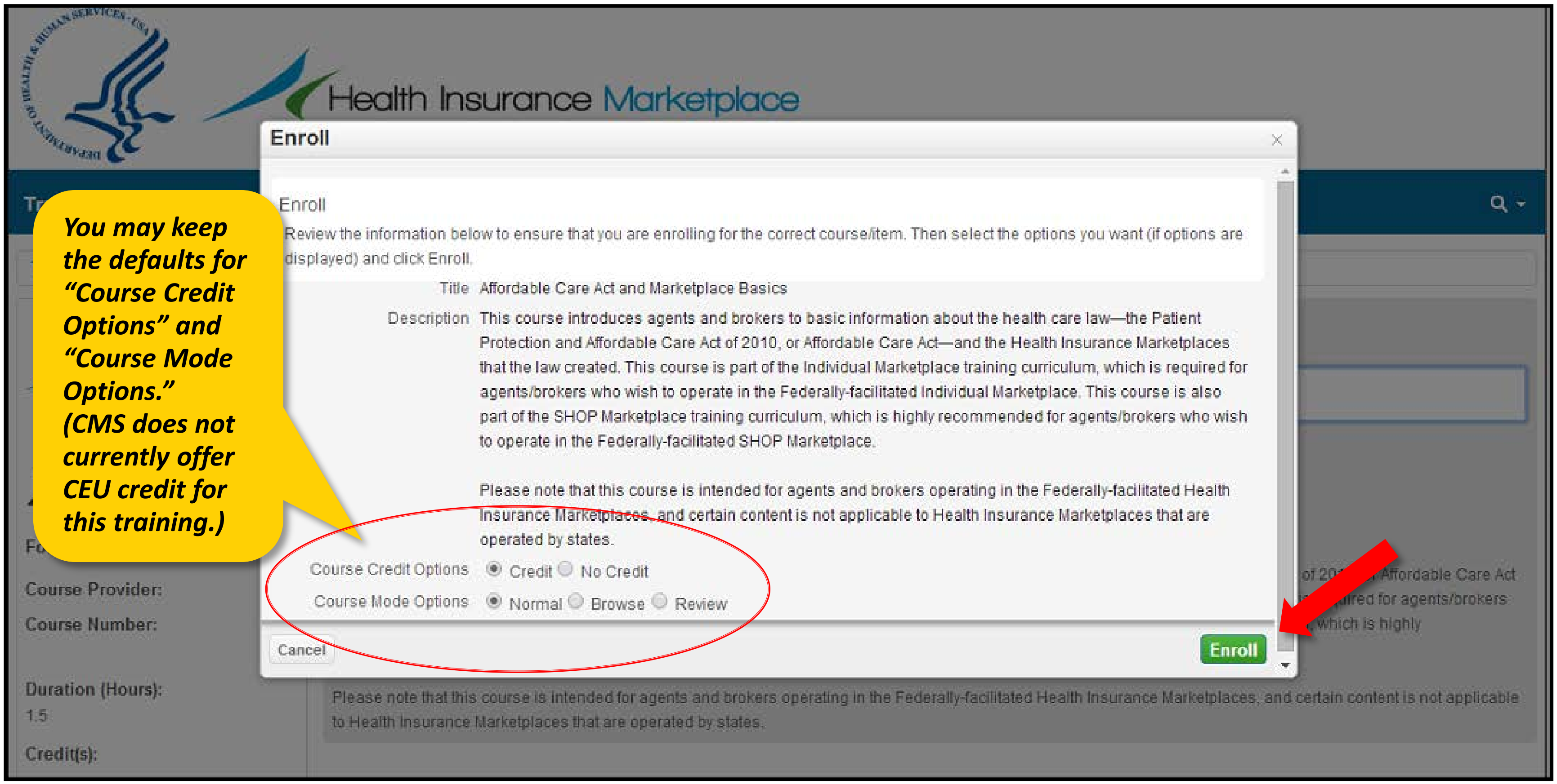
Select “Enroll” to enroll in the course.



Part I

Step 5c: Confirm Enrollment Information

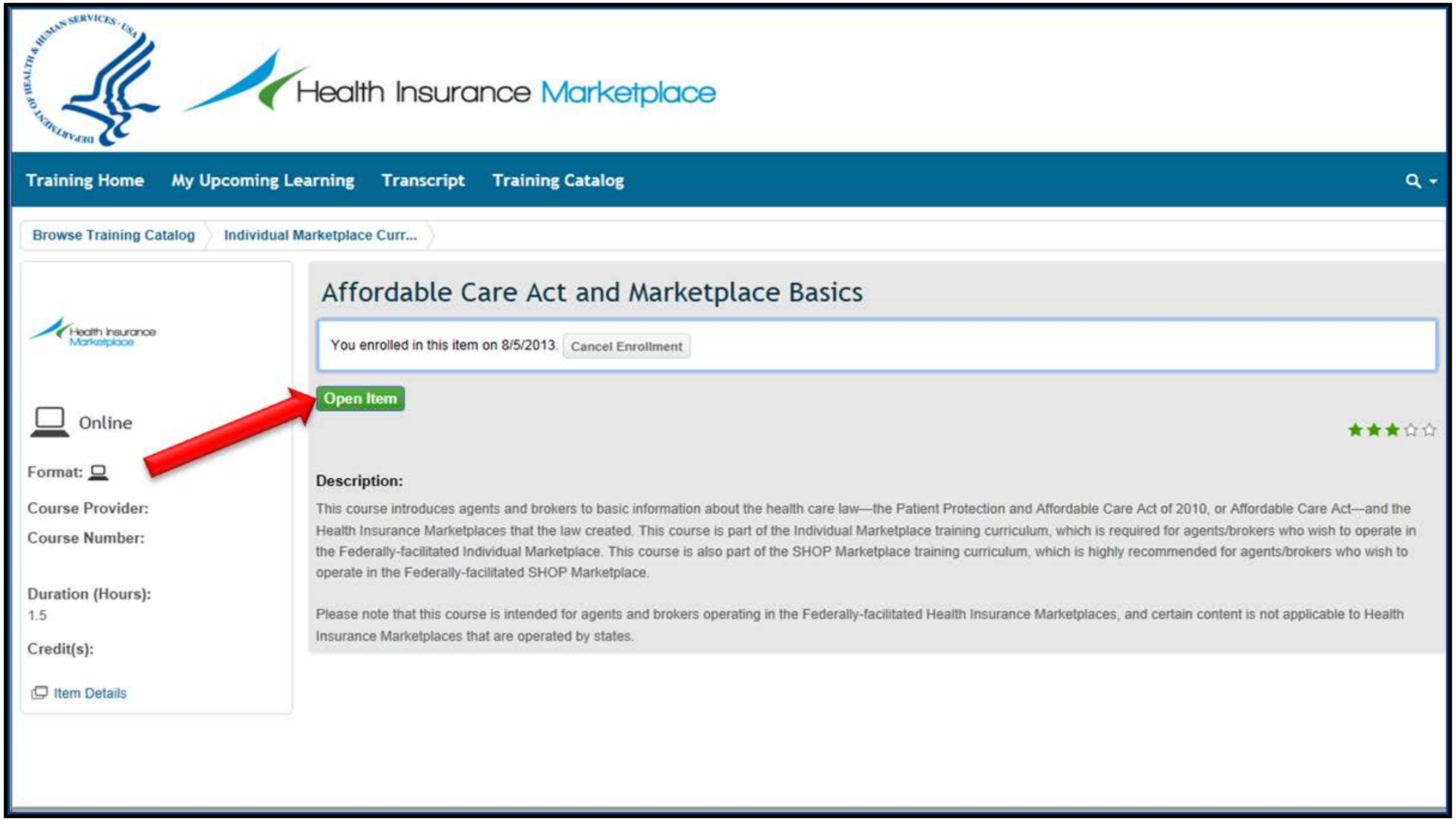
Select “Enroll” to confirm your enrollment in the course.



Part I

Step 5d: Launch the Course

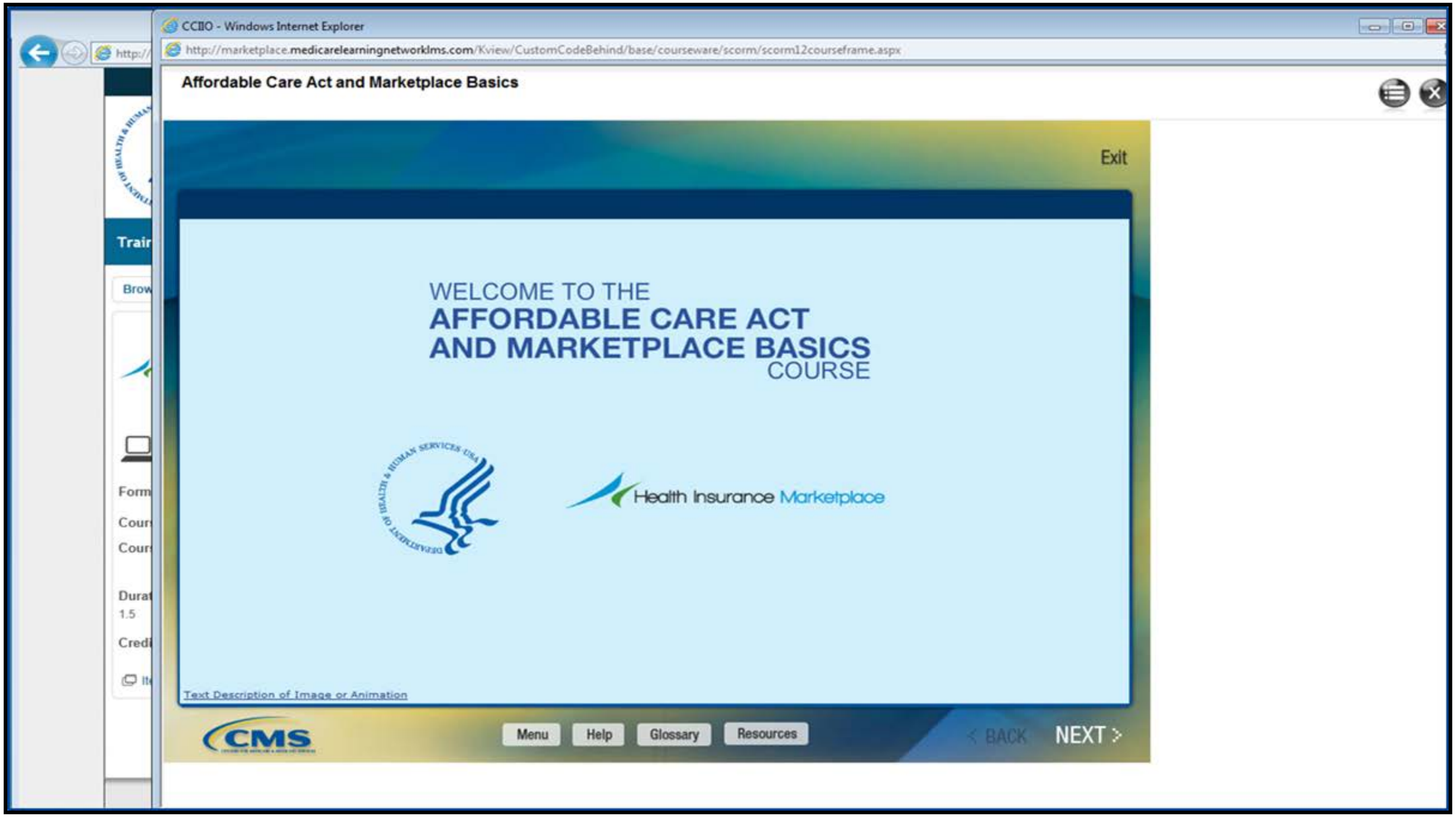
Choose "Open Item" to launch the course.



Part I

Step 6: Start the Training Module

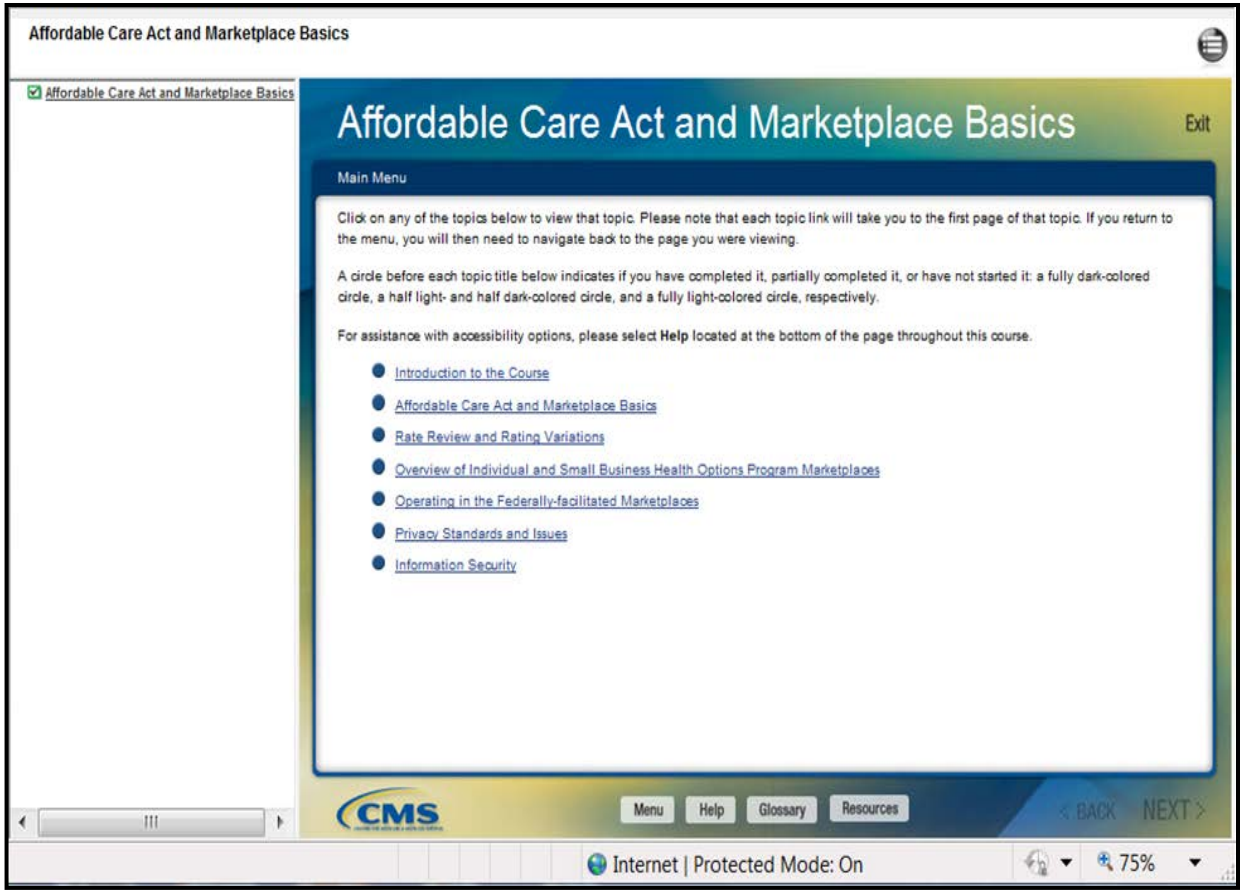
Proceed with taking the course.



Part I

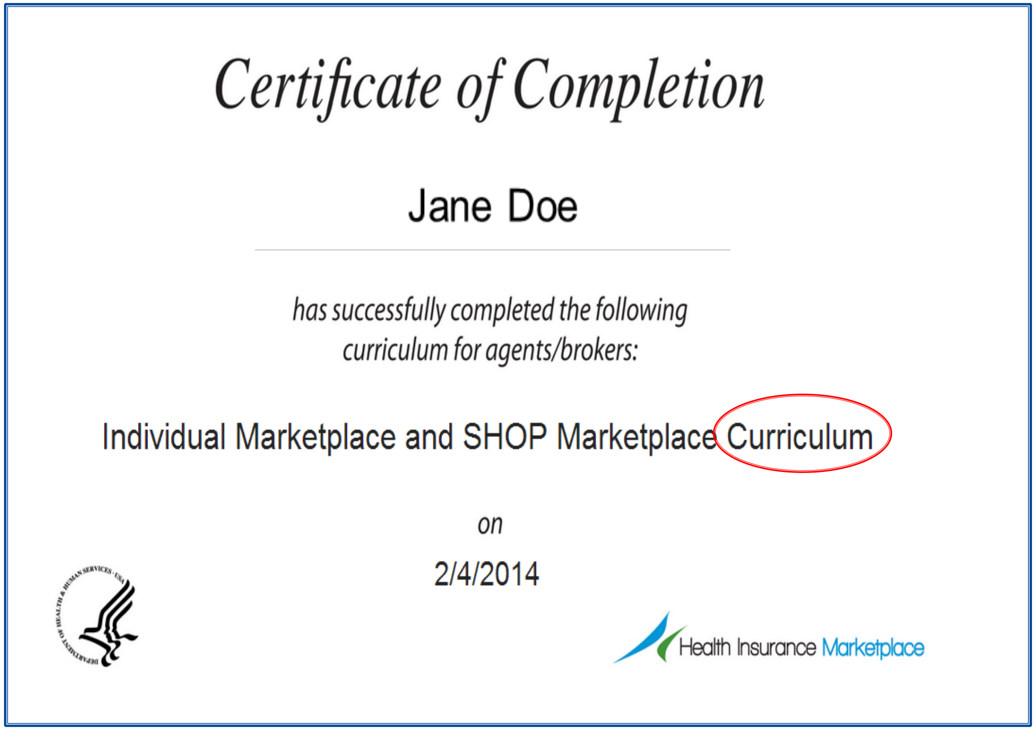
Tip: Menu Displays Within Courses

- The menu page displays the topics in each course.
- After completing each topic in a course, you will return to the menu page.



Step 7: Obtain Curriculum Certificate

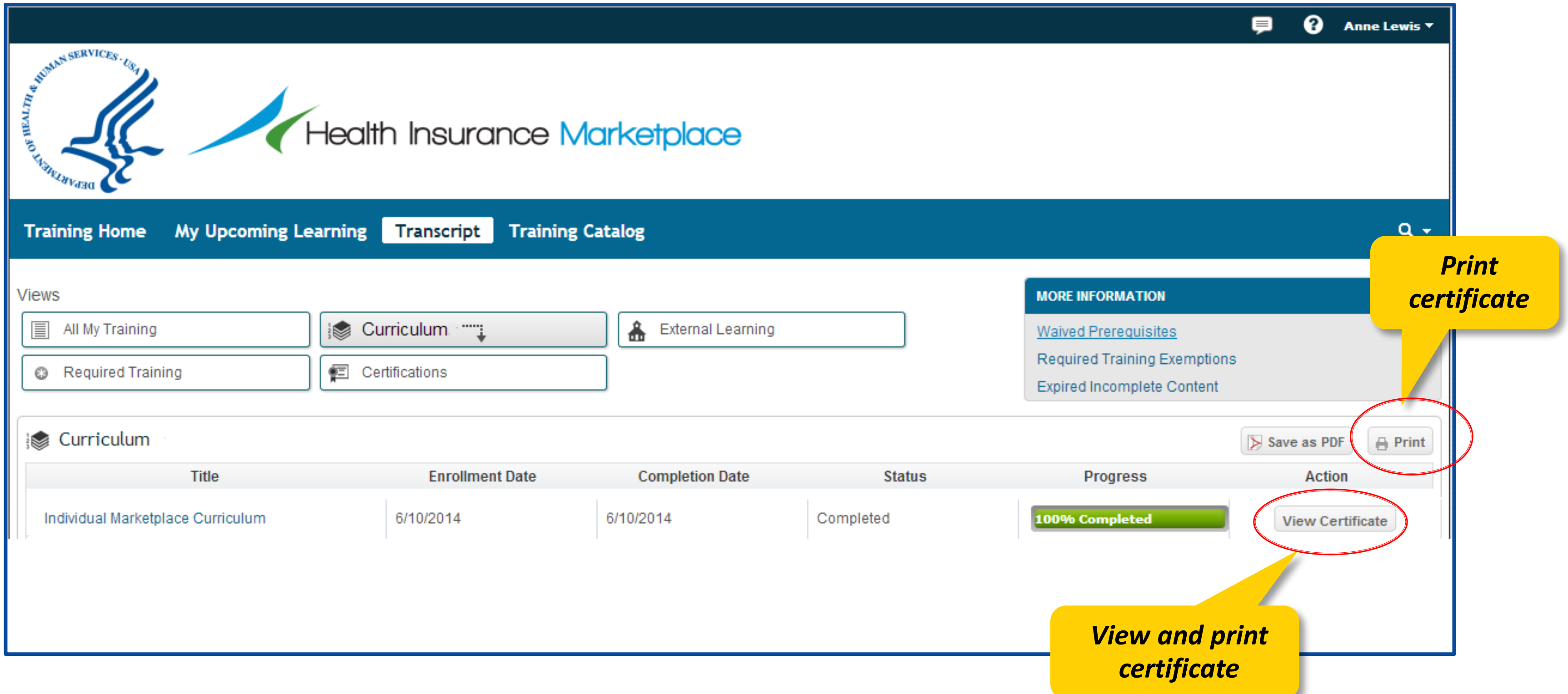
- After you complete all required courses, exams, and Agreements within the curriculum, you will receive a curriculum completion certificate.
- To provide proof of completion, be sure to print the **curriculum certificate**—not the course certificate.



Part I

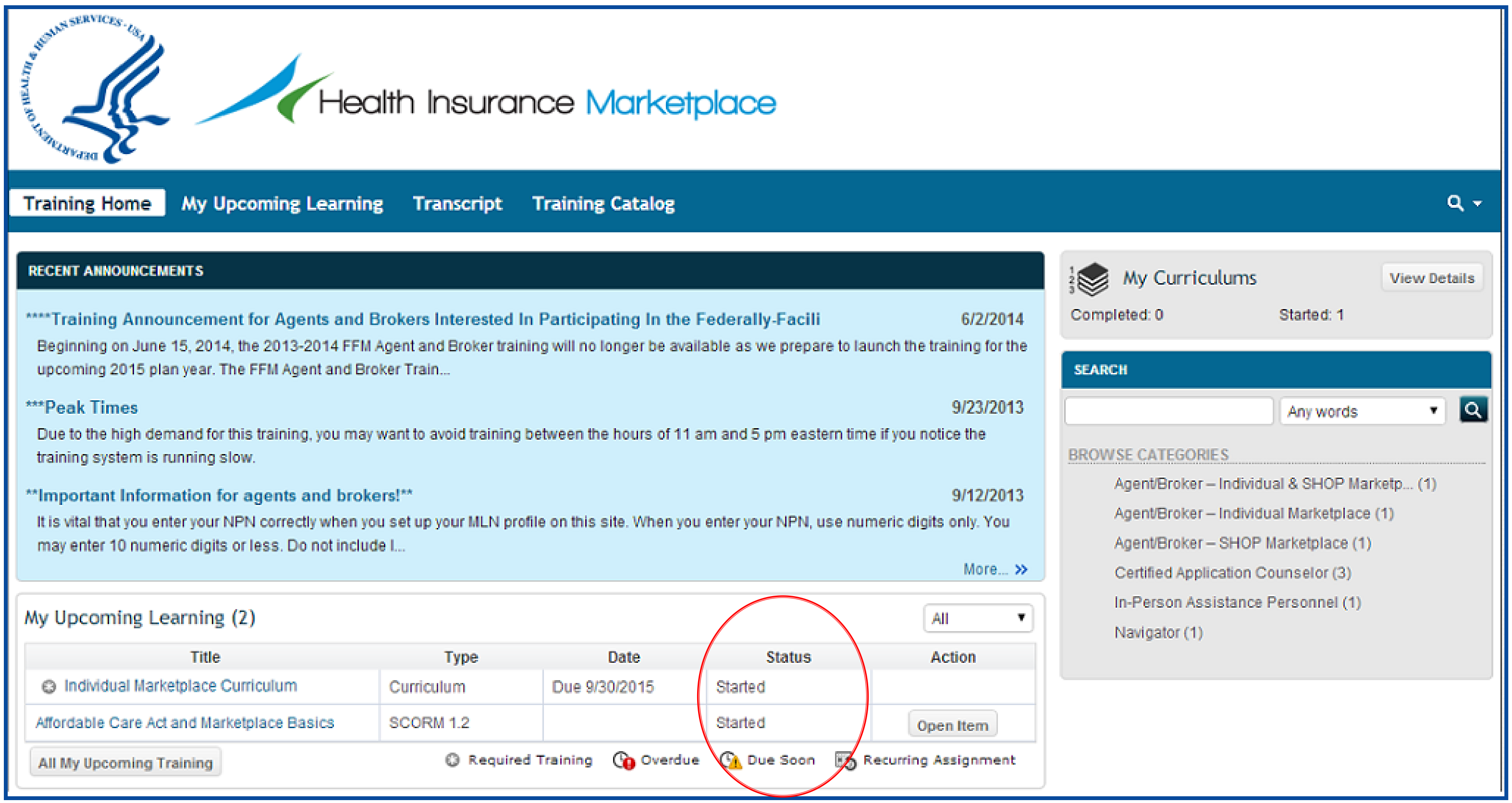
Tip: Viewing and Printing Certificates

You may view or print your curriculum certificate at any time by accessing the "Transcript" tab.



Tip: Training Display and Completion Status

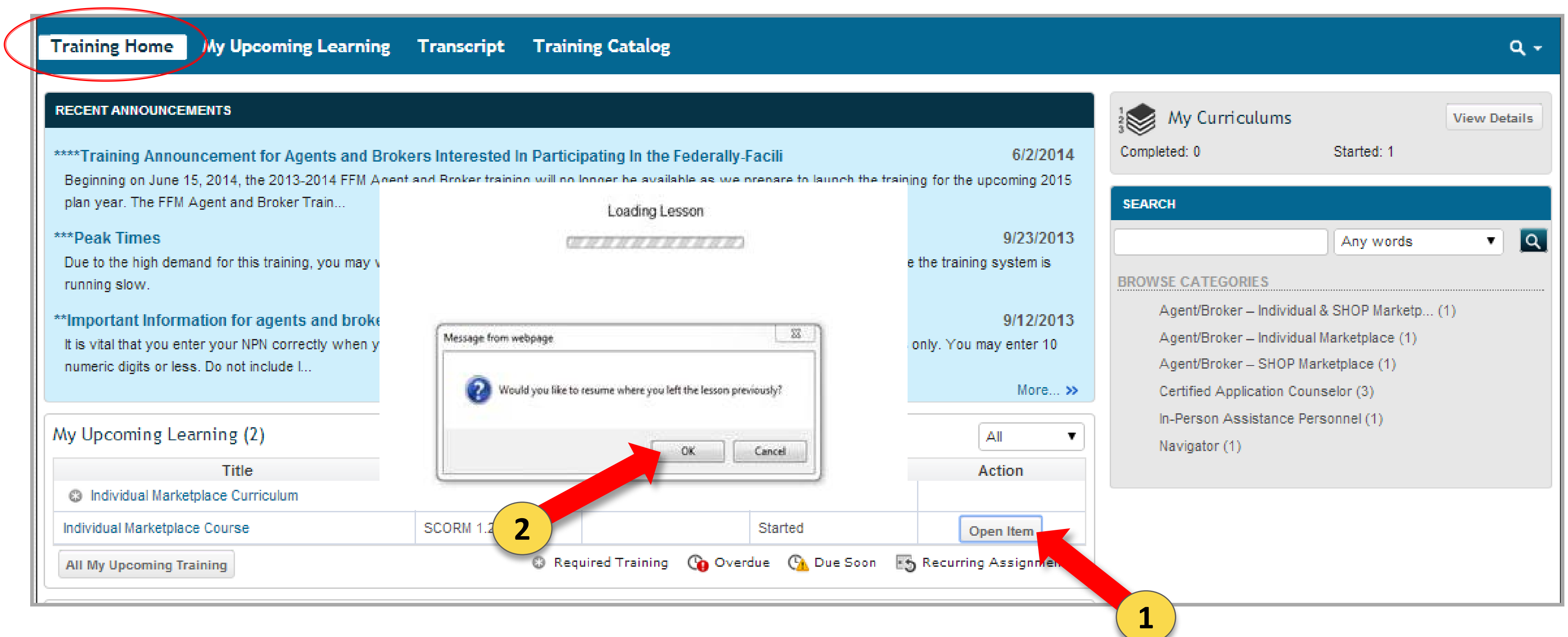
From "Training Home," you can view the status of your courses, exams, and Agreements.



Part I

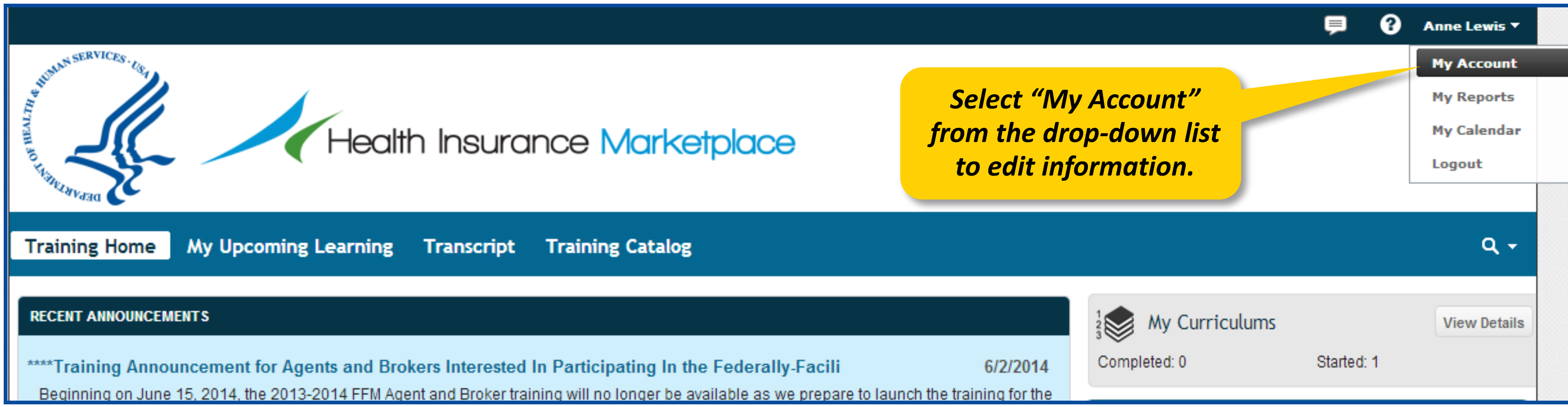
Tip: Bookmarking

Training may be completed in multiple sessions. From “Training Home” you may revisit a course or Agreement, and resume where you left off previously.



Part I

Tip: Updating Your MLN Profile

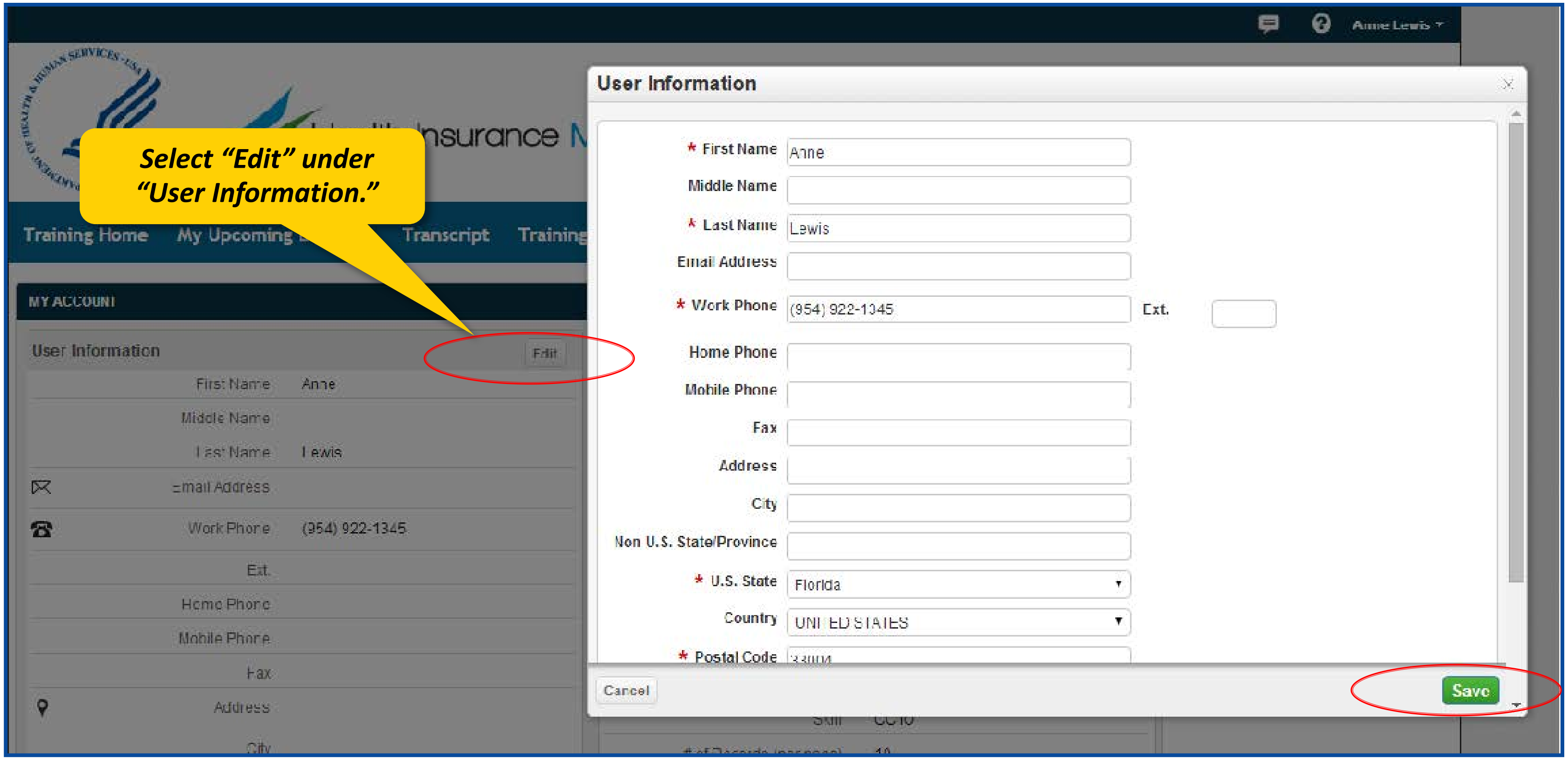


Agents and brokers can change or edit their user type/user role, NPN, and other MLN profile information by accessing "My Account."

- Locate your name at the top right corner of the MLN screen.
- Place your cursor over your name, and a drop-down list will appear. Select "My Account."
- But, remember—it is vital that you enter your NPN correctly in your MLN profile BEFORE you complete a curriculum.

Part I

Tip: Updating Your MLN Profile (continued)



- Select "Edit" under "User Information" on the left side of the page.
- Update the information that you wish to change. Click "Save."

CENTERS FOR MEDICARE & MEDICAID SERVICES

Agent and Broker Federally-facilitated Marketplace (FFM) Registration

Part II: Role Selection and Identity Proofing

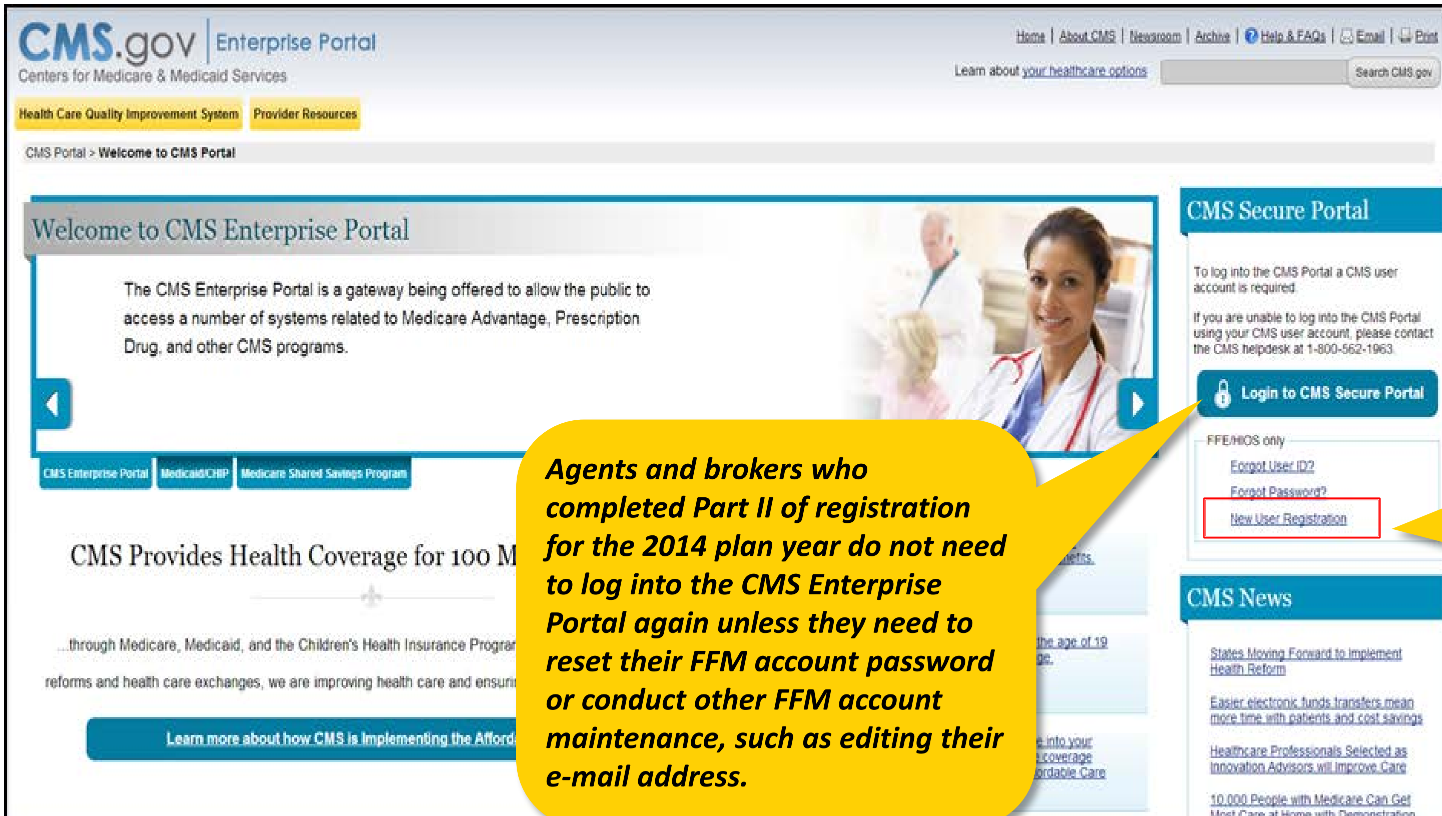
Tip: Processing Time Between Parts I & II

- If you are completing Part I of the registration process, you must wait two business days before completing Part II of the registration process. This allows time for your training completion record to be transmitted from the MLN to the CMS Enterprise Portal.
- **Remember, you only need to complete Part II if you did NOT do so as part of 2014 plan year registration!**

Part II

Step 1: Register on CMS Enterprise Portal

Access the CMS Enterprise Portal, available at: http://portal.cms.gov and select “New User Registration.”



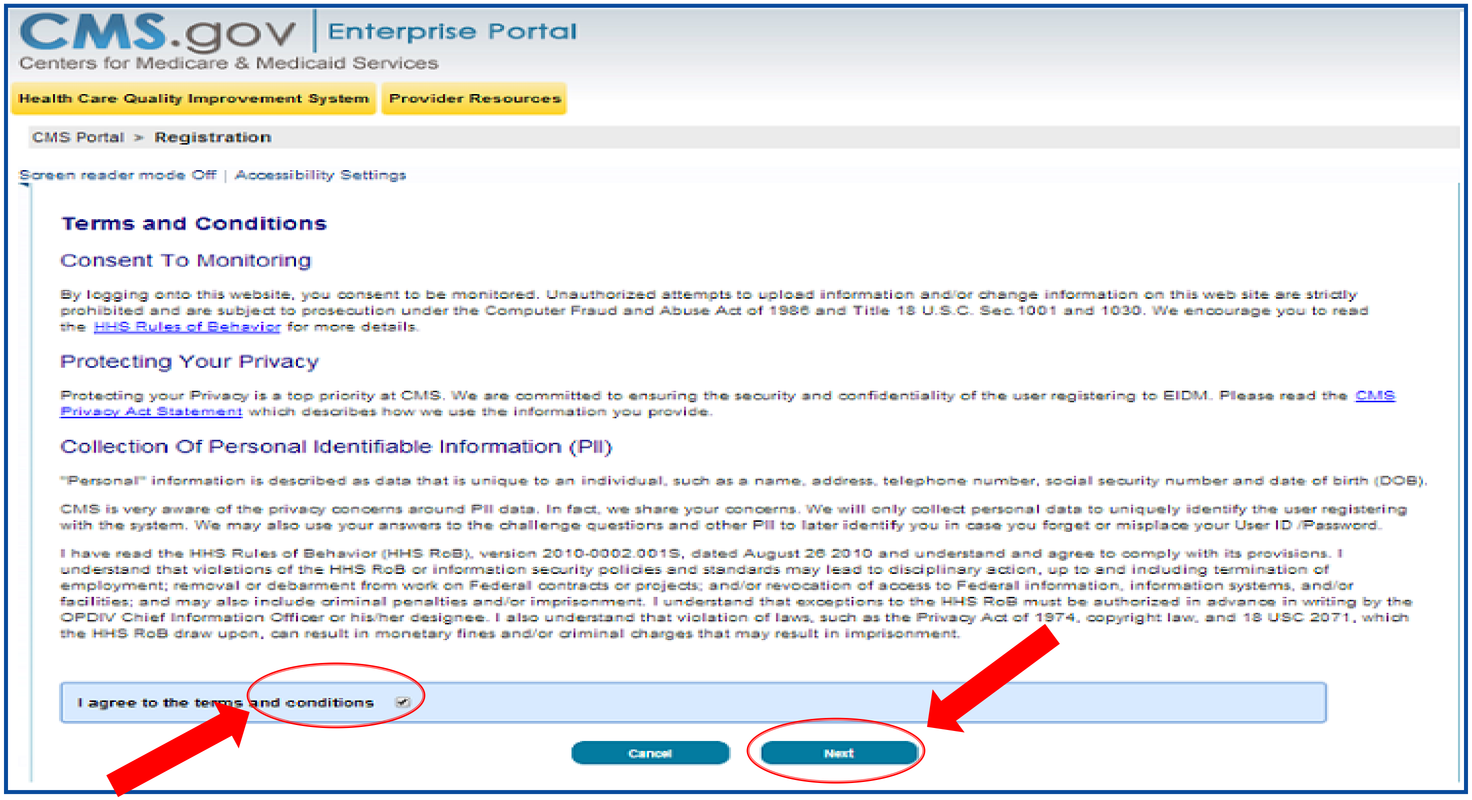
Agents and brokers who completed Part II of registration for the 2014 plan year do not need to log into the CMS Enterprise Portal again unless they need to reset their FFM account password or conduct other FFM account maintenance, such as editing their e-mail address.

New users select “New User Registration.”

Part II

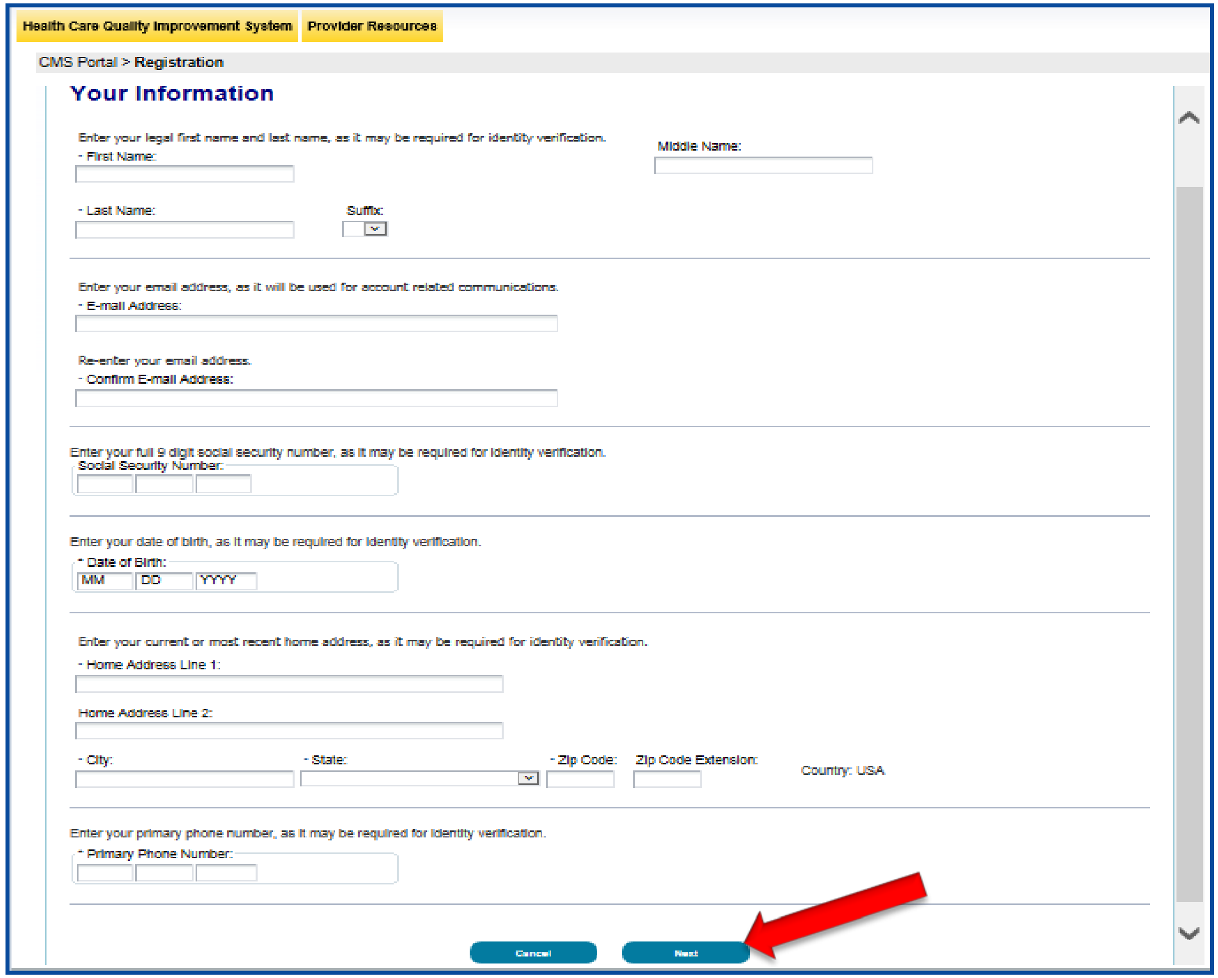
Step 2: Read and Agree to the Terms and Conditions

Read the terms and conditions, then check the box next to "I agree to the terms and conditions." Click "Next."



Step 3: Enter Basic Identifying Information

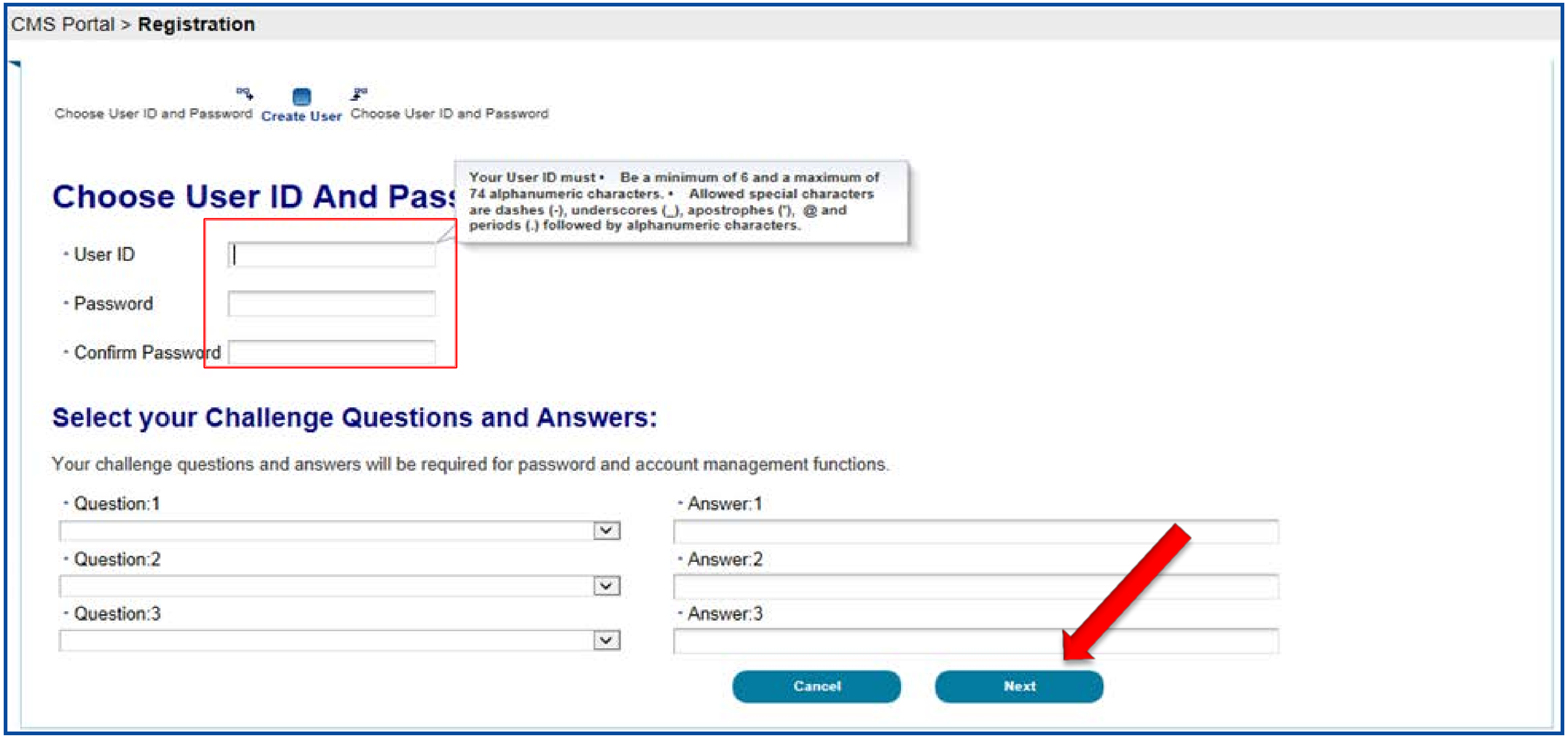
- Enter basic identifying information on the “Your Information” page.
- Note that Social Security Number is not required. Click “Next.”



Part II

Step 4: Create an FFM User Account

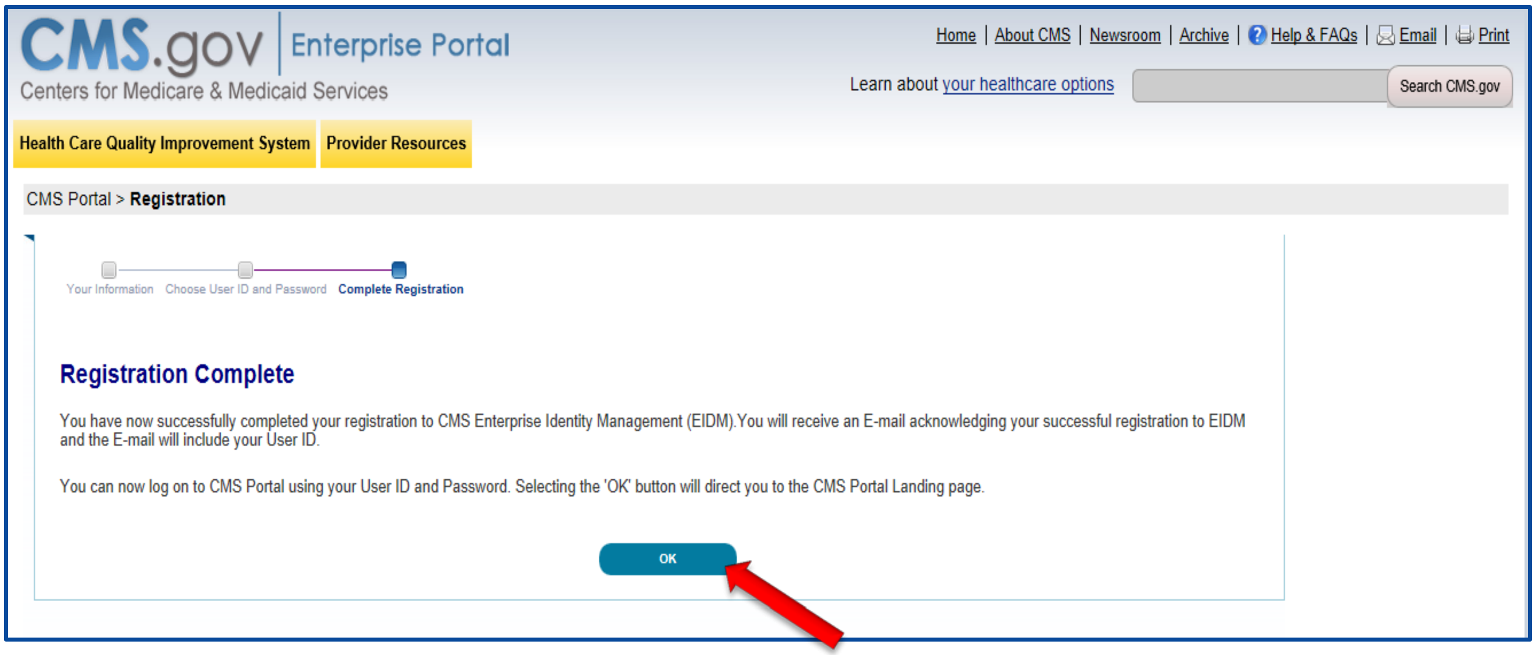
Create your FFM user account (i.e., FFM user ID and password). Respond to the challenge questions and click "Next."



Part II

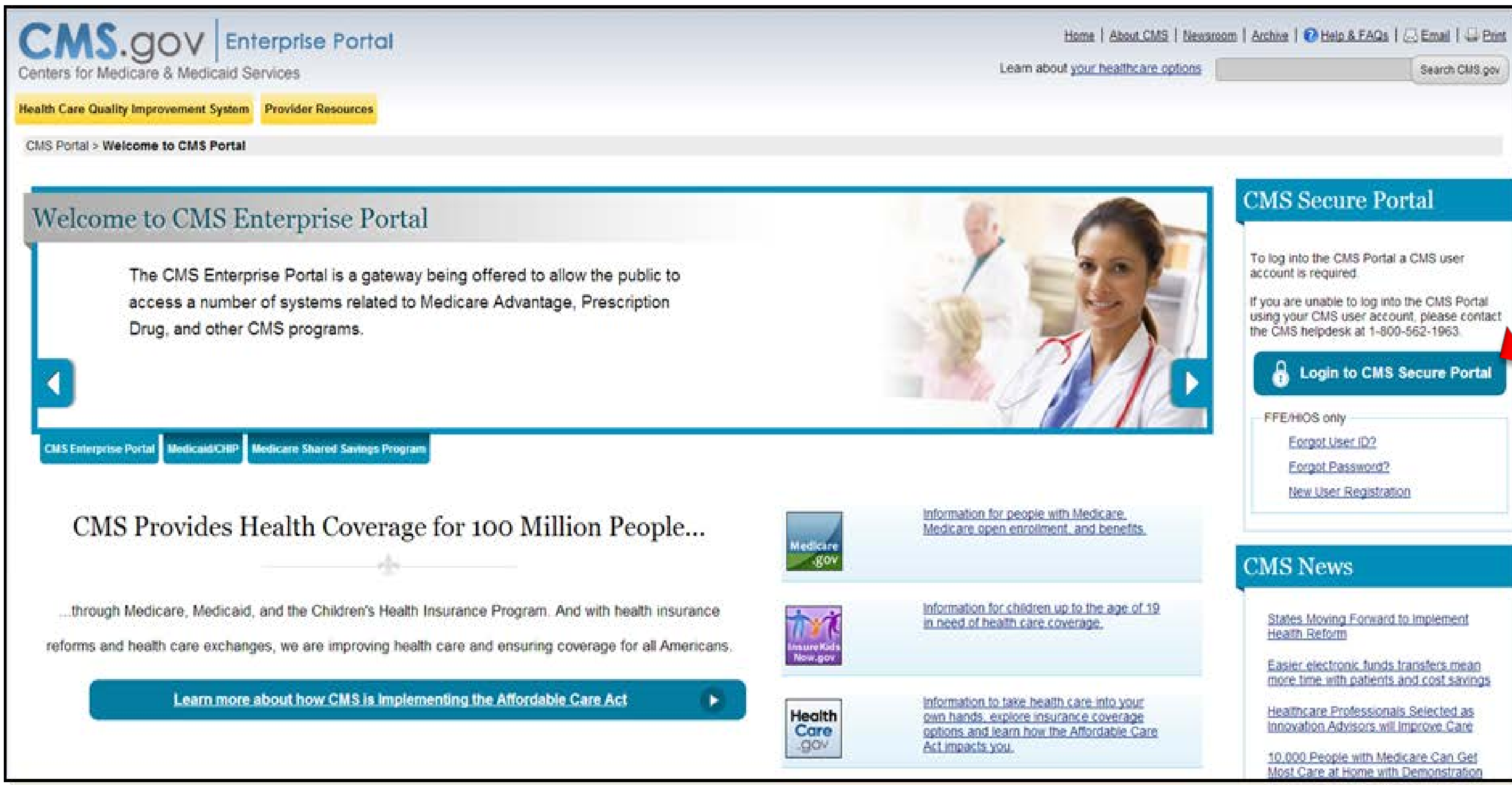
Step 5: Account Creation Complete

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



Step 6: Log In to CMS Secure Portal

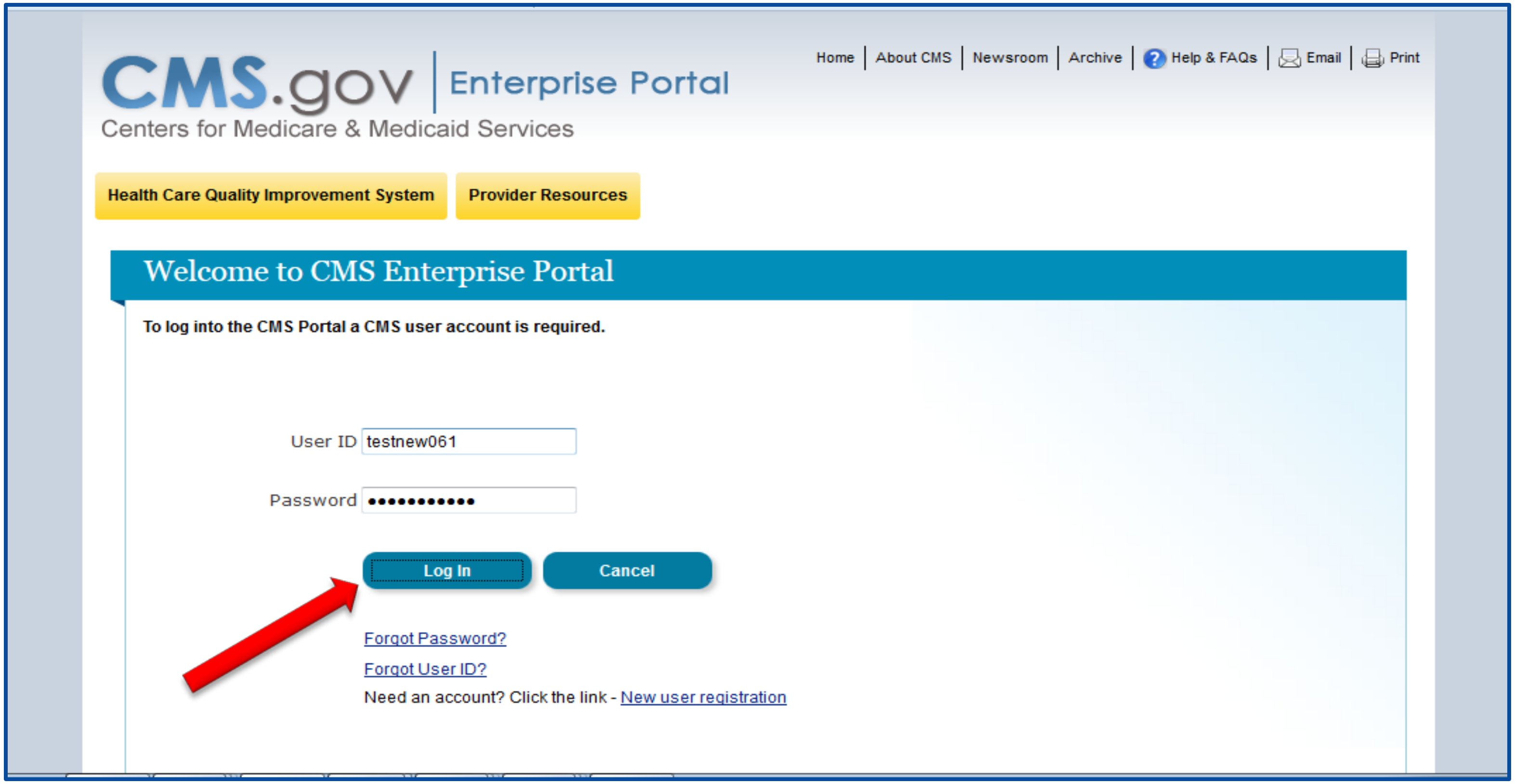
Select “Login to CMS Secure Portal.”



Part II

Step 7: Enter FFM User ID and Password

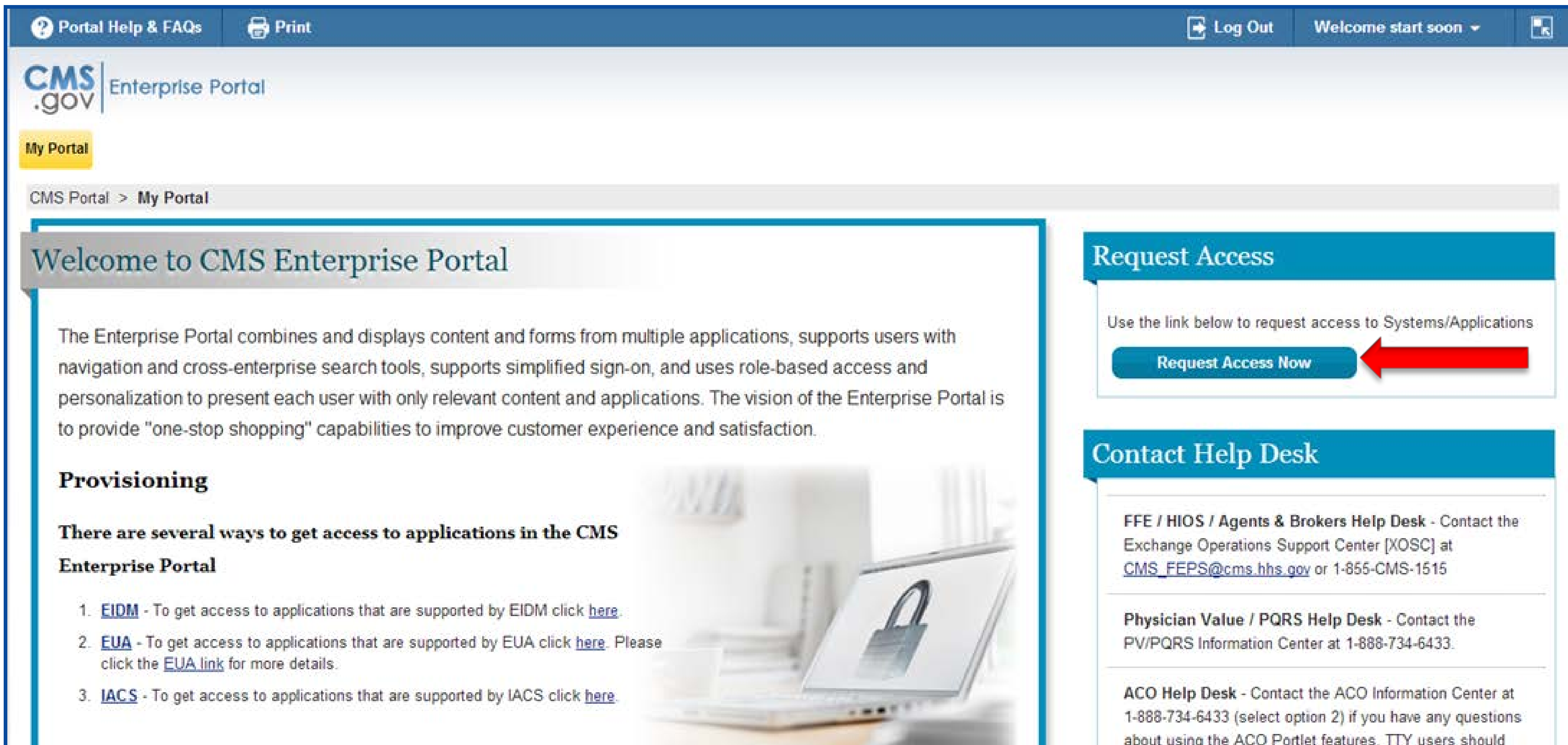
Enter the FFM user ID and password you created in Step 4. Select “Log In.”



Part II

Step 8: Request Access

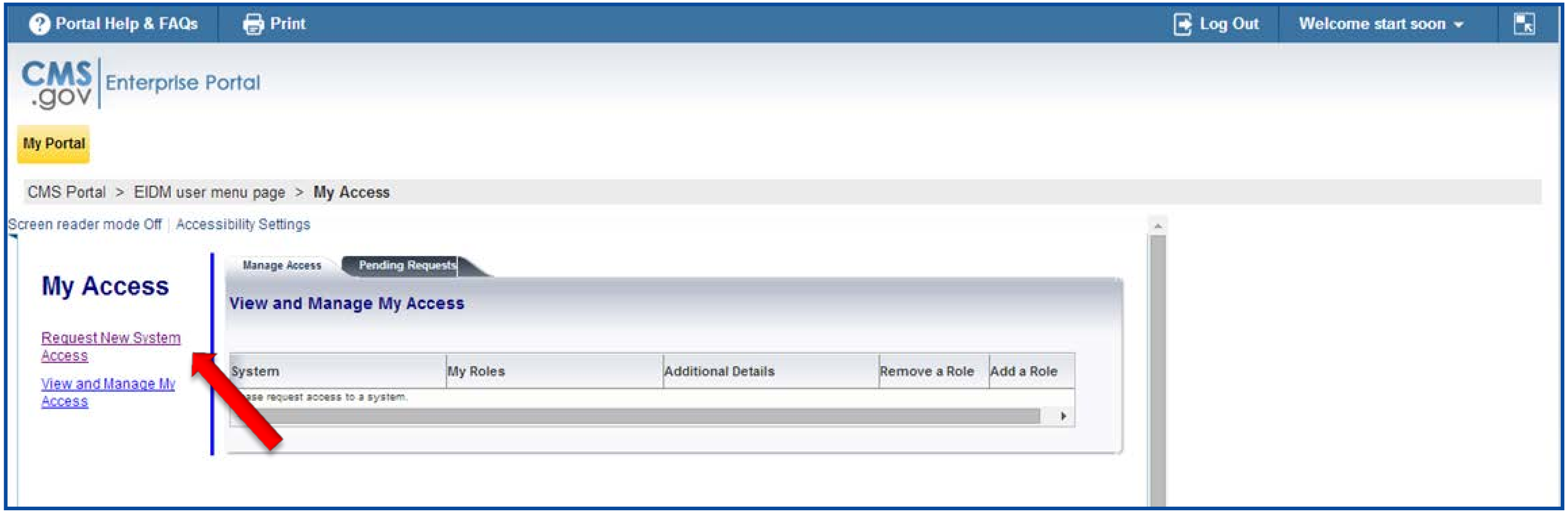
On the “My Portal” page, select “Request Access Now” under “Request Access.”



Part II

Step 9: Request New System Access

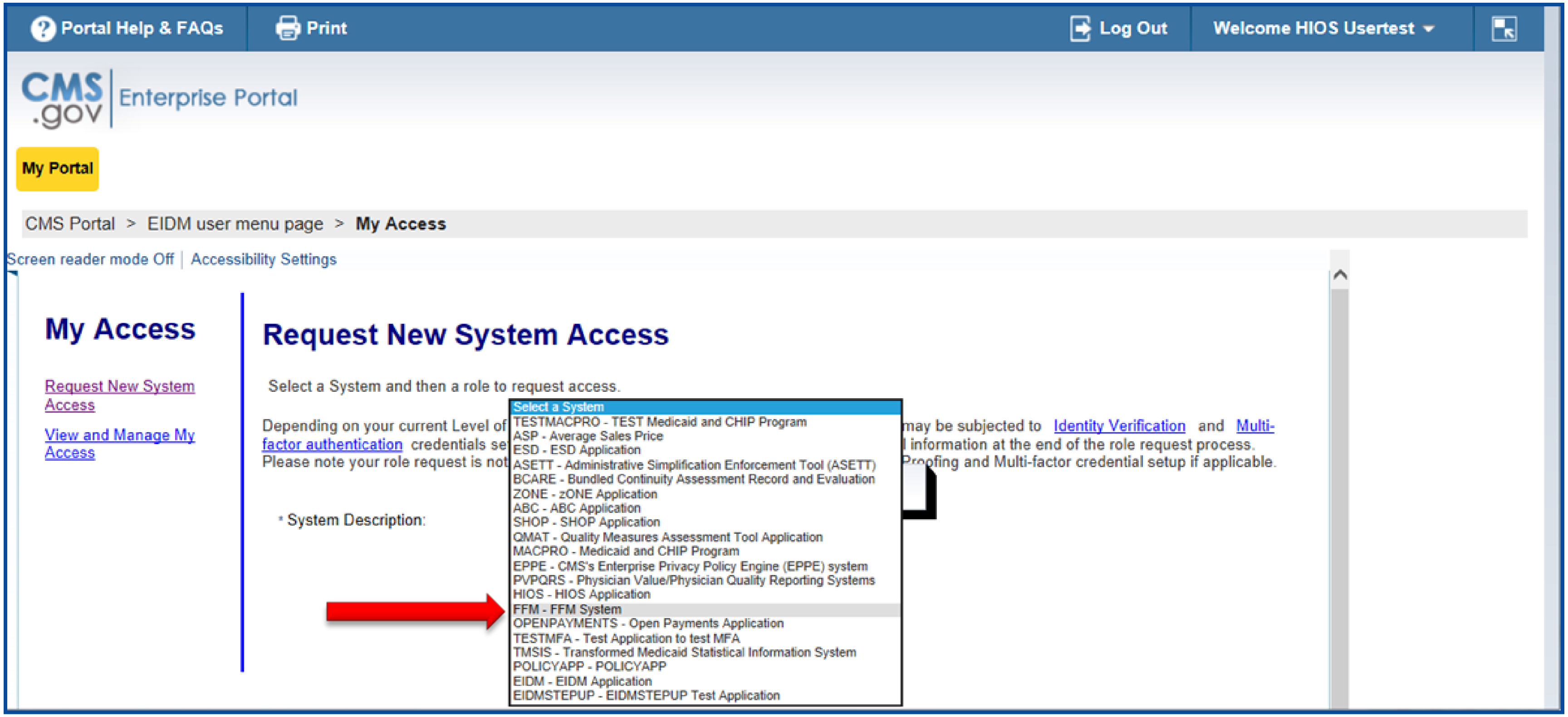
Under “My Access,” select “Request New System Access.”



Part II

Step 10: Select FFM Application

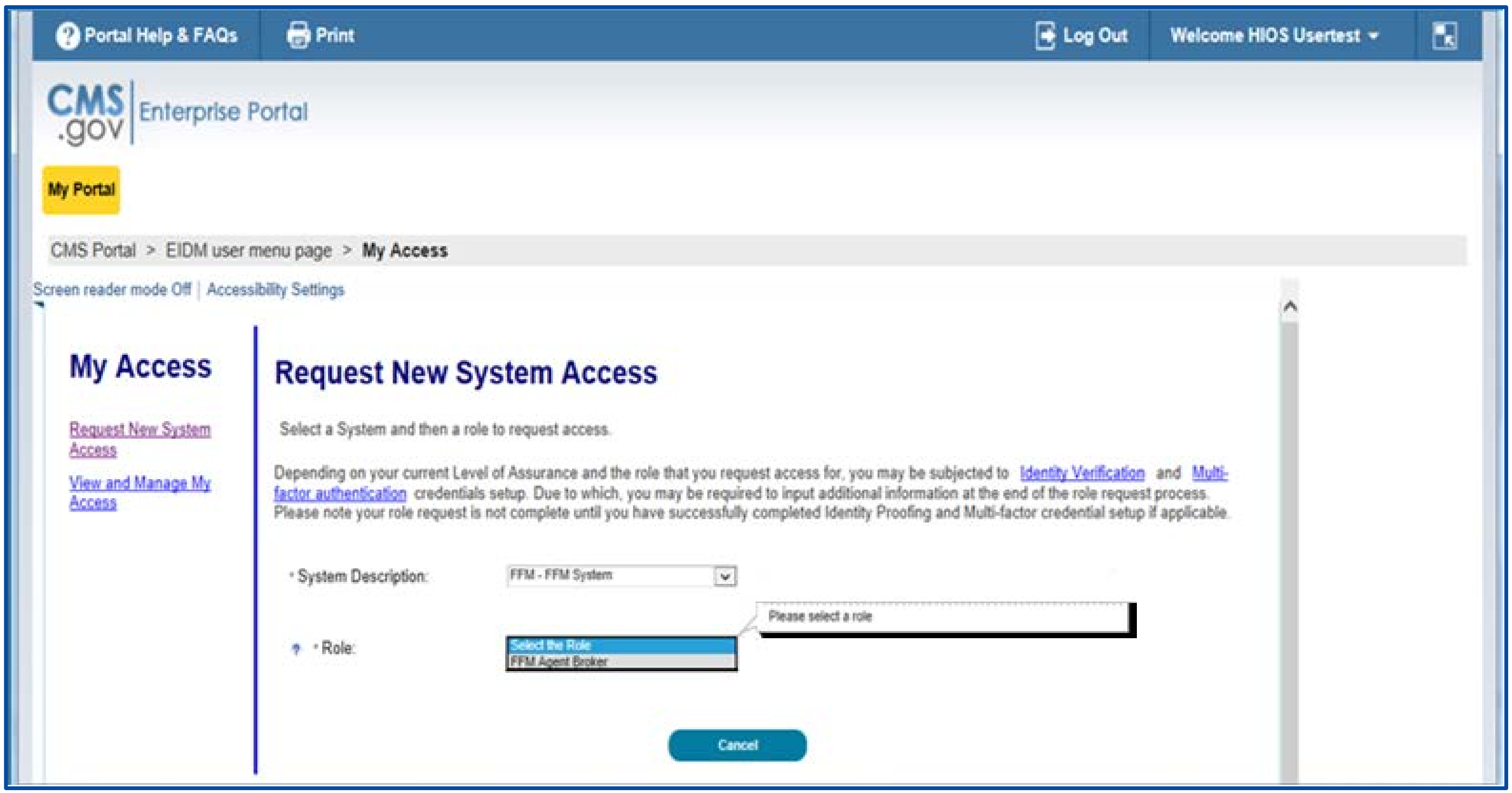
Next to “System Description,” select “FFM - FFM System.”



Part II

Step 11: Select FFM Agent Broker Role

Under “Role,” select “FFM Agent Broker.”

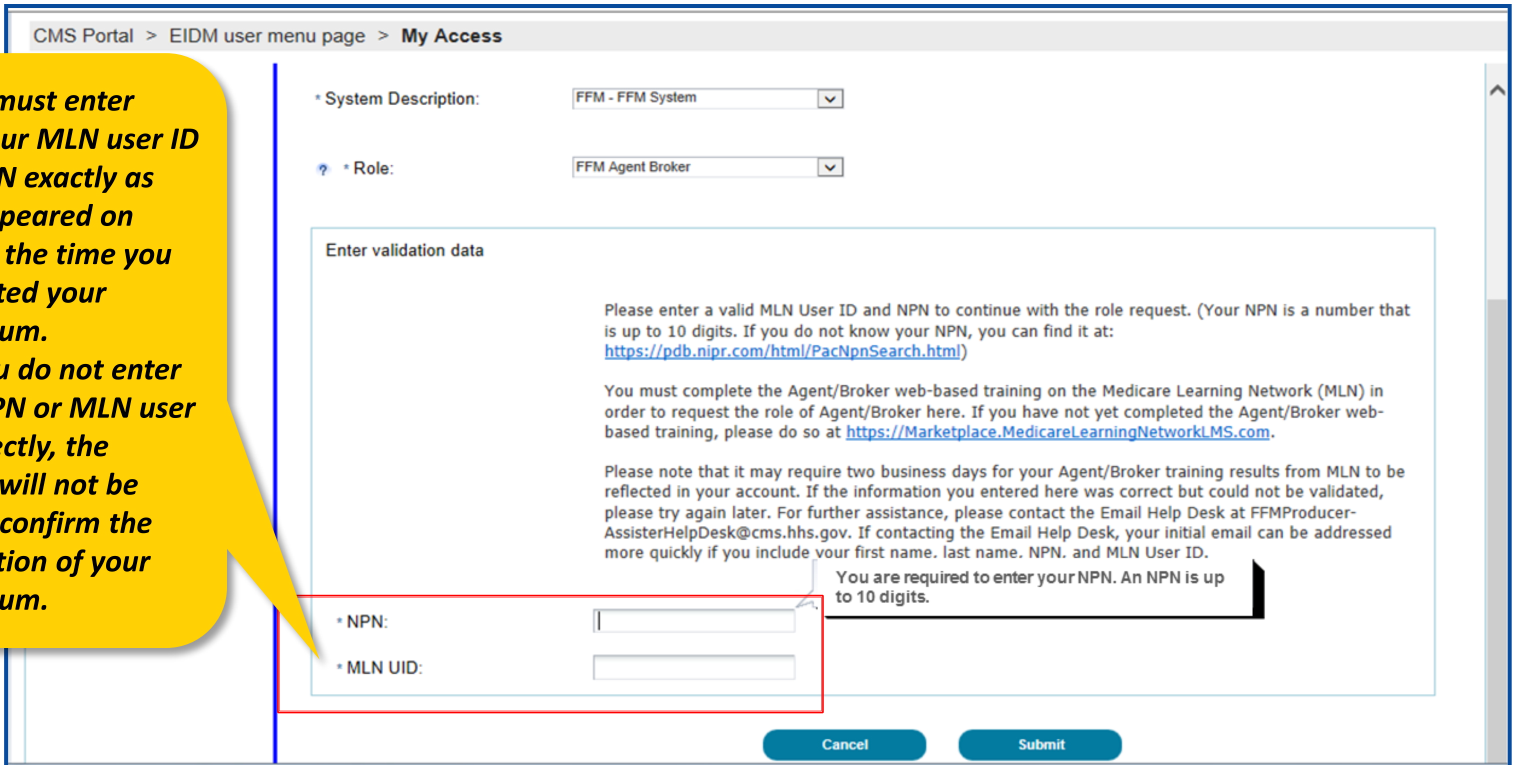


Part II

Step 12: Enter NPN and MLN User ID

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

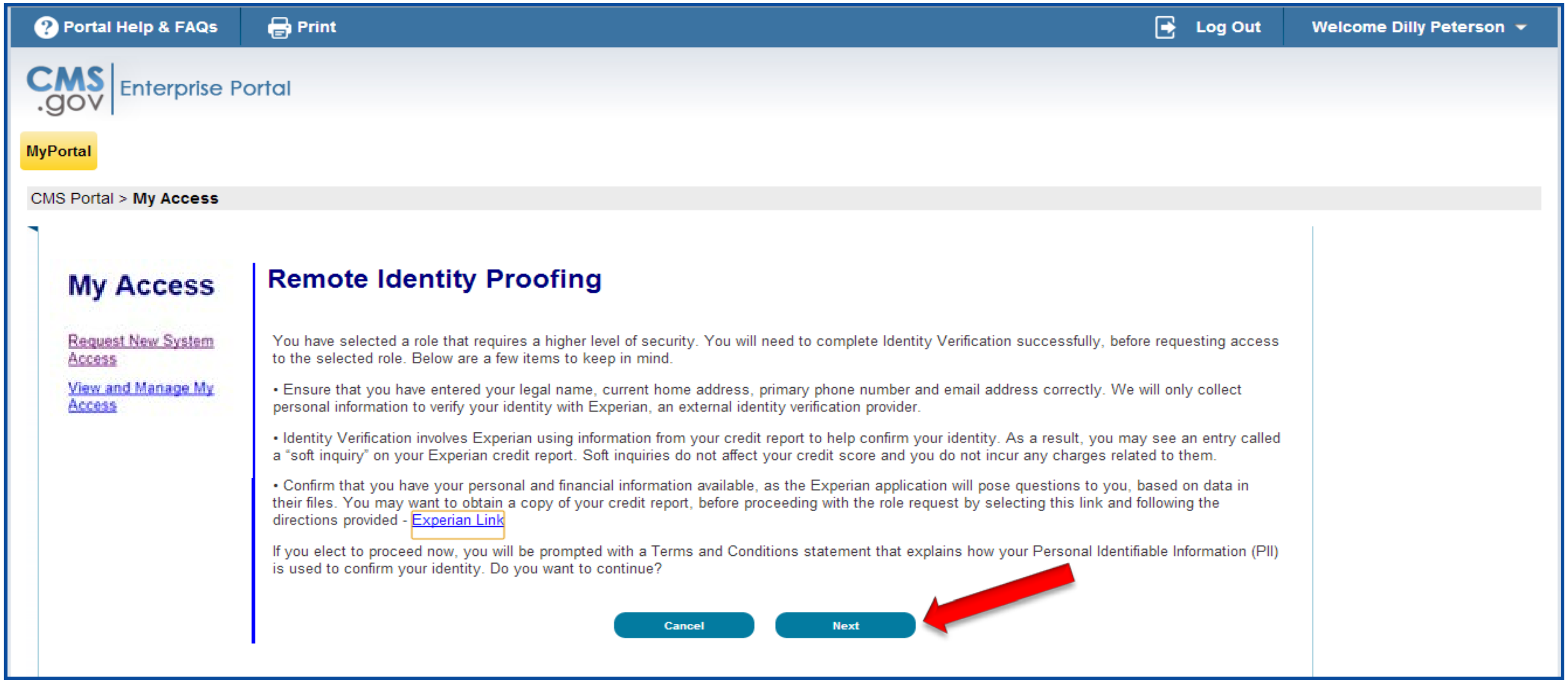
- ***You must enter both your MLN user ID and NPN exactly as they appeared on MLN at the time you completed your curriculum.***
- ***If you do not enter your NPN or MLN user ID correctly, the system will not be able to confirm the completion of your curriculum.***



Part II

Step 13: Read the Identity Proofing Explanation

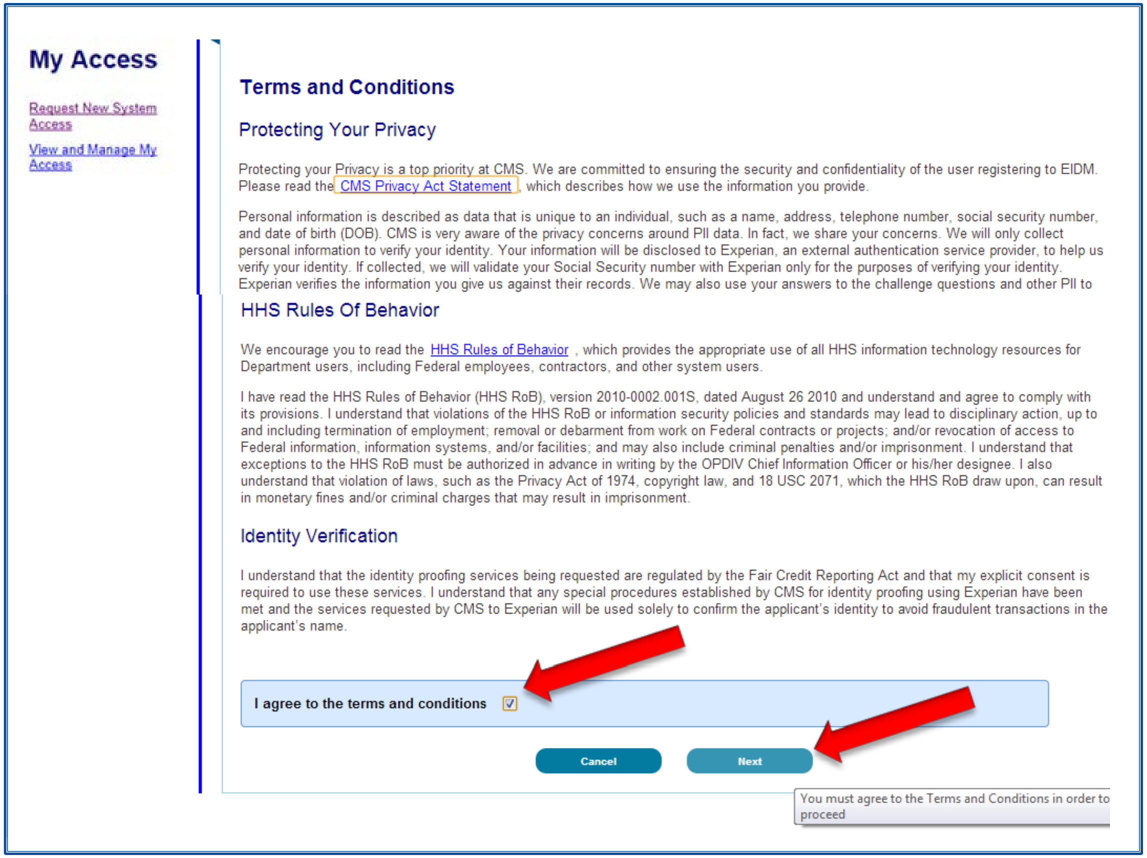
You will be returned to the “My Access” page. Read the explanation under “Remote Identity Proofing” and click “Next.”



Part II

Step 14: Agree to Terms and Conditions

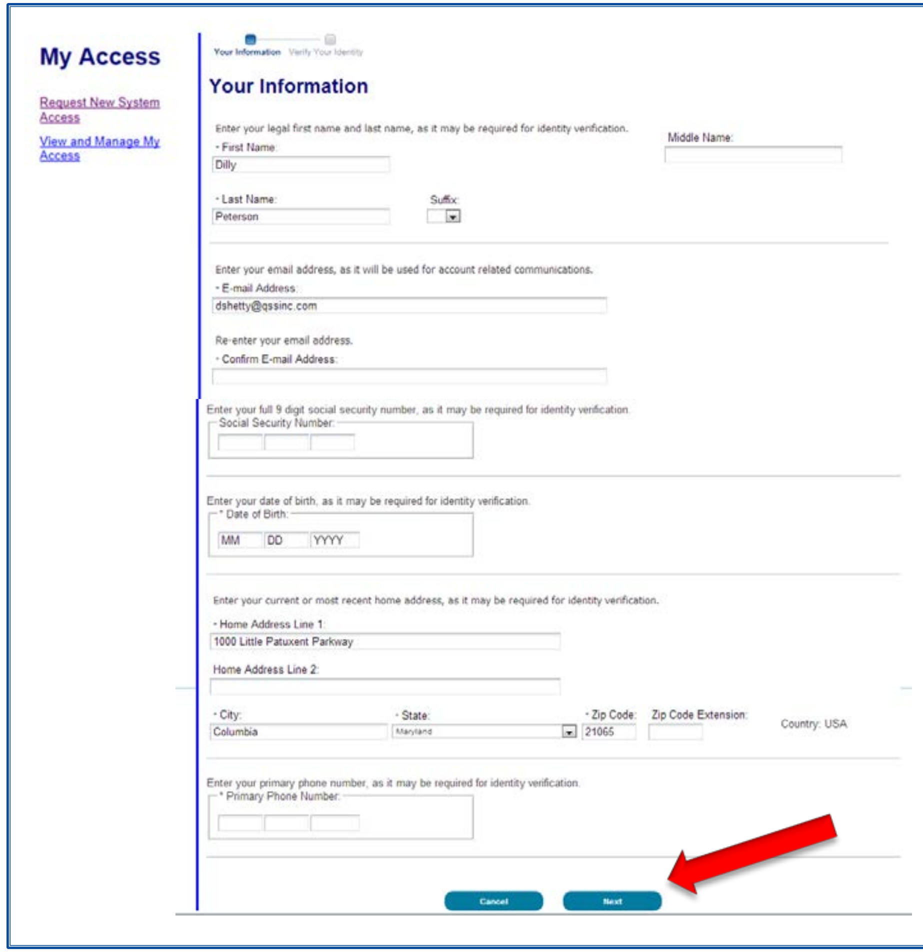
You will be returned to the "My Access" page. Read the Terms and Conditions. Click "I agree to the terms and conditions," and then select "Next."



Part II

Step 15: Enter Your Identifying Information

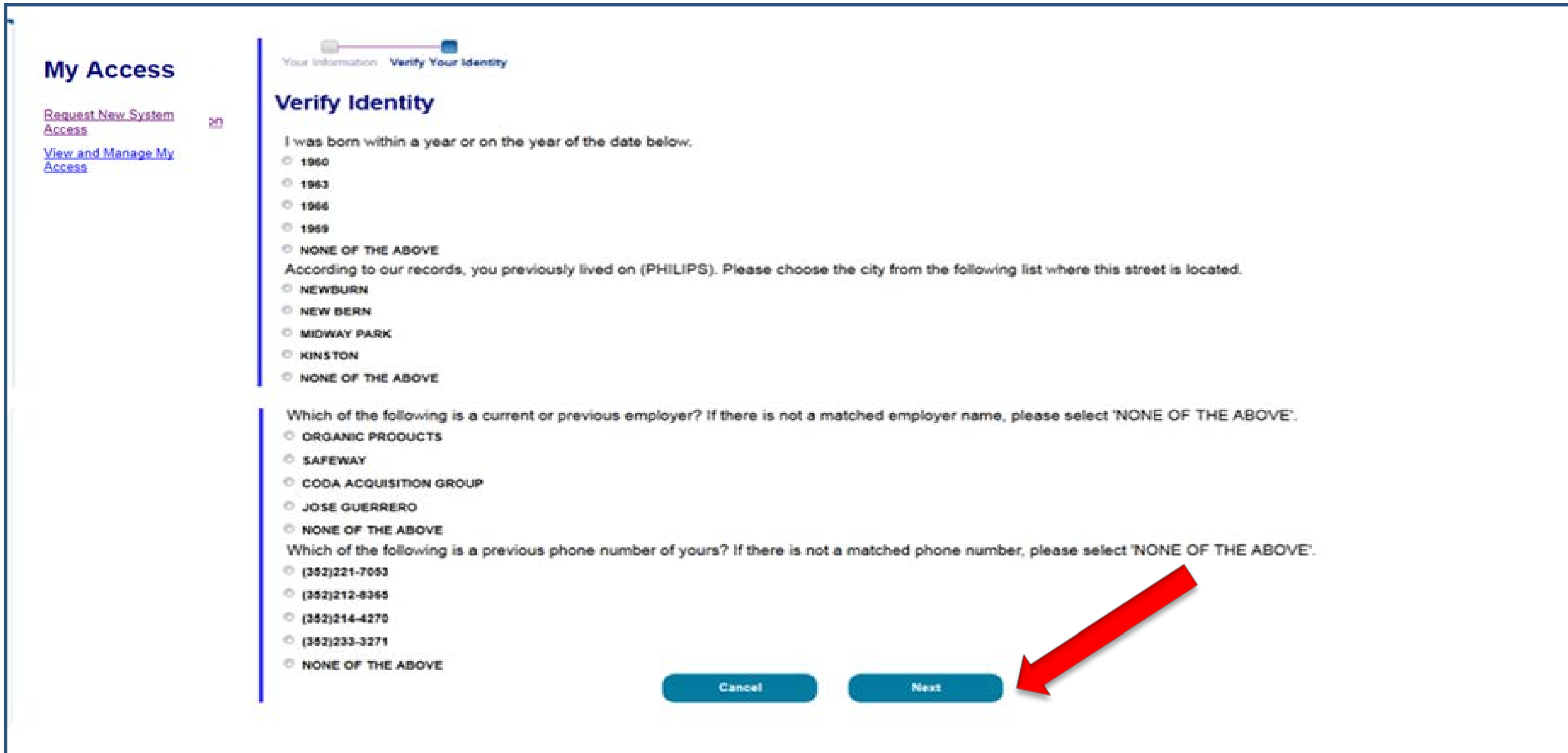
You will be prompted to enter your identifying information. This information will be used to create the identity proofing questions. Click “Next” when you have finished.



Part II

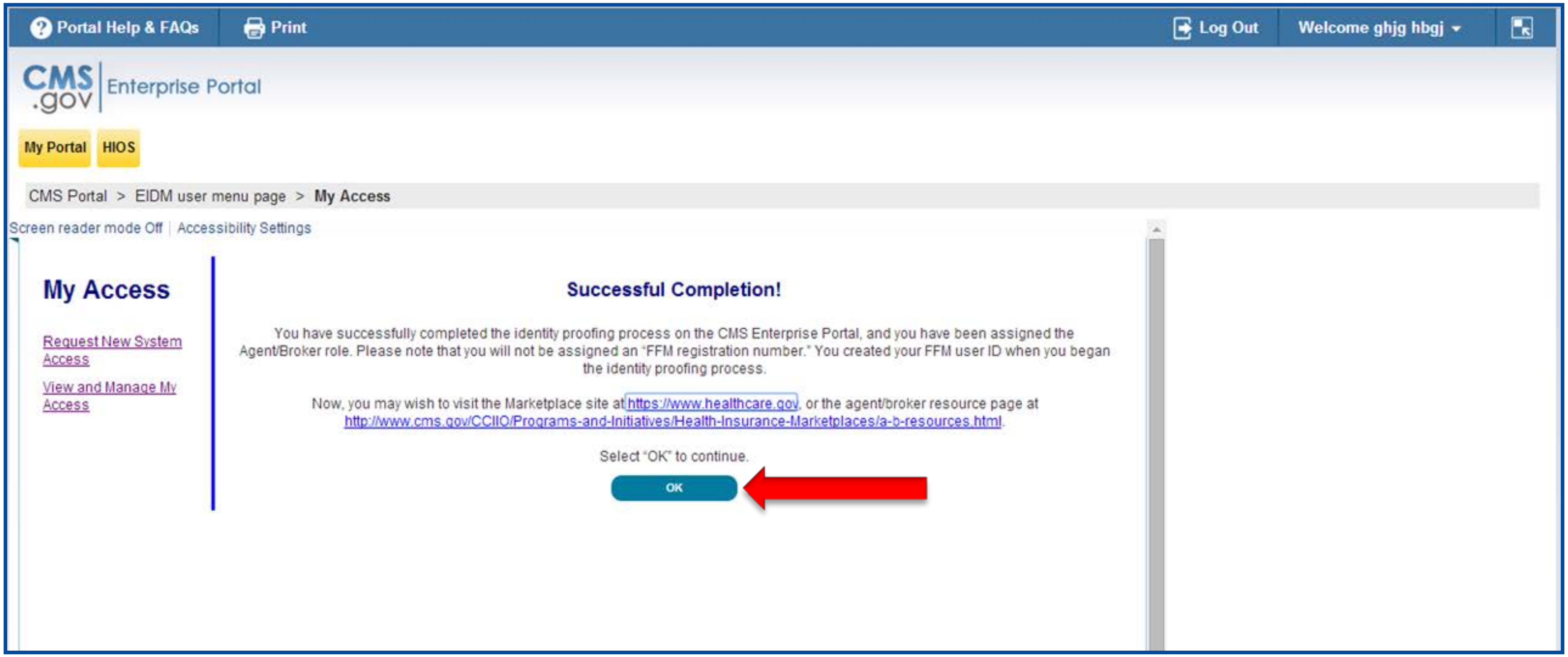
Step 16: Answer Security Questions

Answer the security questions to verify your identity.



Step 17: Notification of Successful Completion

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



Agent and Broker Federally-facilitated Marketplace (FFM) Registration

Resources

Resources

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

- **Frequently Asked Questions Regarding Agents and Brokers:** http://www.cms.gov/CCIIO/Programs-and-Initiatives/Health-Insurance-Marketplaces/Downloads/Agent-Broker-FAQs-5-30-14.pdf
- **Registering to Participate in the Federally-facilitated Marketplace for the 2015 Plan Year: What Agents and Brokers Need to Know:** http://www.cms.gov/CCIIO/Programs-and-Initiatives/Health-Insurance-Marketplaces/Downloads/AB_Training-and-Registration-Overview_052914_Opt1_v11.pdf
- **Operational Tips for Completing Agent and Broker Registration for the Federally-facilitated Marketplace:** http://www.cms.gov/CCIIO/Programs-and-Initiatives/Health-Insurance-Marketplaces/Downloads/Operational_Tips_5_30_2014_508.pdf
- **Quick Reference Guide: Agent and Broker Training and Registration Process for the FFM:** http://www.cms.gov/CCIIO/Programs-and-Initiatives/Health-Insurance-Marketplaces/Downloads/agent-broker-reg-quick-reference_revised_5_29_14_508.pdf
- **Federally-facilitated Marketplace Agent and Broker Registration For the 2015 Plan Year: Frequently Asked Questions:** http://www.cms.gov/CCIIO/Programs-and-Initiatives/Health-Insurance-Marketplaces/Downloads/Agent_Broker_Registration_QA_May_2014_508.pdf