Plan Year 2017 Federally-facilitated Marketplace (FFM) Registration and Training for Agents and Brokers New to the FFMs

An Overview for Agents and Brokers

- *July 20, 2016*
- *July 27, 2016*
- *August 4, 2016*

Disclaimer

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 webinar applies to agents and brokers in states with a State-based Marketplace that uses the federal platform (i.e., HealthCare.gov) for eligibility and enrollment functions, known as State-based Marketplaces on the federal platform, or SBM-FPs. The information presented does not apply to agents and brokers who participate in the State-based Marketplaces that do not use the federal platform. Please review the guidance on our Agents and Brokers Resources webpage (http://go.cms.gov/CCIIOAB) and Marketplace.CMS.gov to learn more.

Webinar Agenda

- Small Business Health Options Program (SHOP) Marketplace Overview
- FFM Registration and Training Overview
- FFM Agent and Broker CMS-approved Vendor Training Option
- FFM Agent and Broker Registration and Training Steps
- Call Center and Help Desk Support
- Resources
- Question & Answer (Q&A) Session
- Closing Remarks

Note: Unless indicated otherwise, references to the FFMs or "Marketplace" in this presentation include FFMs where the states perform plan management functions, as well as -the SBM-FPs.

Plan Year 2017 FFM Registration and Training for Agents and Brokers
New to the FFMs

SHOP Marketplace Overview

SHOP Marketplace Registration

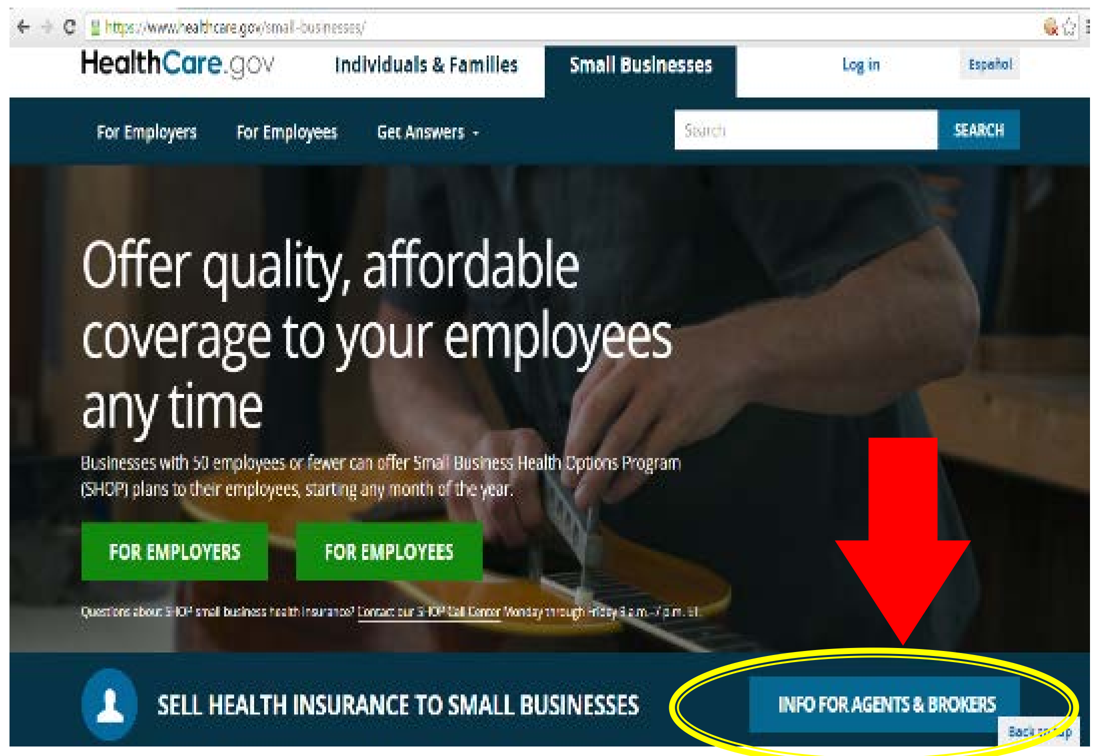
To register to participate in the SHOP Marketplace, agents and brokers:

- **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); and
- **May** complete the SHOP Marketplace training and exam. It is highly recommended that agents and brokers complete SHOP Marketplace training, but not required.

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

SHOP Marketplace Agent/Broker Portal

- The SHOP Marketplace Agent /Broker Portal can be accessed by visiting: www.healthcare.gov/small-businesses/ and selecting the "Info for Agents and Broker Button."
- Use your FFM User ID and password to log in to the SHOP Marketplace Agent/Broker Portal.



Note: The SHOP Marketplace Agent/Broker Portal is only available to those agents and brokers who have completed the FFM registration process for the SHOP Marketplaces.

SHOP Marketplace Agent/Broker Portal

- The information you provide during Marketplace registration will be searchable by employers looking for assistance with their SHOP Marketplace application and enrollment.
- You can make edits to the information displayed in the SHOP Marketplace through the MLMS by logging into your CMS Enterprise Portal account at https://portal.cms.gov/.

Working With Clients in the SHOP Marketplace

- Employers must authorize a SHOP Marketplace-registered agent or broker to work on their behalf.
- To authorize a SHOP Marketplace-registered agent or broker, employers must:
  - Create an account and verify their identity at HealthCare.gov
  - Search for an agent or broker by name, National Producer Number (NPN), or location and click "Authorize"
  - Once an employer sends an authorization to an agent or broker, the agent or broker can log in to his or her SHOP Marketplace Agent/Broker Portal account and accept the authorization
- Once authorized, SHOP Marketplace-registered agents and brokers may complete the entire application on behalf of their clients.
- Through the SHOP Marketplace Agent/Broker Portal, SHOP Marketplace-registered agents and brokers can:
  - Assist employers with their applications and enrollments
  - View clients' premium payments and enrollment statuses
  - Manage clients' accounts, including adding/removing employees and dependents from coverage

What is New in the SHOP Marketplace for 2017

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.

Alaska	Illinois	Maine	New Hampshire	Texas
Delaware	Iowa	Missouri	North Dakota	Virginia
Florida	Kansas	Montana	Ohio	Wisconsin
Georgia	Louisiana	Nevada	Oklahoma	Wyoming

For more information, visit: *https://www.cms.gov/CCIIO/Programs-and-Initiatives/Health-Insurance-Marketplaces/2017-Implementation-of-Vertical-Choice.html.*

SHOP Marketplace Tools at HealthCare.gov

Tool	Functionality & Value
See Plans and Prices	Help clients browse SHOP Marketplace health and dental plans available in their area. Premium estimates are based on age and geographic location.
Full Time Equivalent (FTE) Employee Calculator	Help clients determine if they may be eligible for SHOP Marketplace 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 the SHOP Marketplace.

SHOP Marketplace Resources

- Learn more about the SHOP Marketplace and use tools to help your clients enroll in SHOP Marketplace coverage at www.HealthCare.gov/small-businesses/
- Find SHOP Marketplace resources, fact sheets, and user guides at Marketplace.CMS.gov
- Watch step-by-step SHOP Marketplace application and enrollment videos at www.youtube.com/playlist?list=PLaV7m2-zFKphB8T_modG40hUQeGLCa24c

Keep Up With SHOP Marketplace News

- Connect with us on LinkedIn: www.linkedin.com/company/the-shop-marketplace-at-healthcare.gov?trk=prof-following-company-logo
- Like us on Facebook: www.facebook.com/Healthcare.gov
- Follow us on Twitter: https://twitter.com/HealthCareGov
- Tell your clients about what the SHOP Marketplace has to offer, using a SHOP Marketplace Web Badge.

Plan Year 2017 FFM Registration and Training for Agents and Brokers New to the FFMs

FFM Registration and Training Overview

Welcome to Agents and Brokers for Plan Year 2017!

Thank you for your interest in becoming a plan year 2017 FFM agent or broker!

- 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.
- They also play a crucial role in educating consumers about the Health Insurance Marketplaces, both during annual Open Enrollment and throughout the coverage 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 FFMs.
- 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 and services 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.

Registration and Training Overview

- Registration for plan year 2017* will be available through the CMS Enterprise Portal (https://portal.cms.gov/).
- Agents and brokers who wish to participate in the FFMs for the first time must complete the following actions on the CMS Enterprise Portal:
  - Create an account
  - Request the FFM Agent/Broker role
  - Complete remote identity proofing through the Enterprise Identity Management (EIDM) System
- Agents and brokers who participated in the FFMs for plan year 2014 or 2015, but who did not participate for plan year 2016, have a CMS Enterprise Portal account and have completed identity proofing, but **will need to request the FFM Agent/Broker role when they log in.**

** 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.*

Registration and Training Overview (continued)

Agents and brokers who wish to participate in the FFMs for plan year 2017 must also complete the following actions:

1. Complete/update their agent/broker profile on the MLMS via the CMS Enterprise Portal
2. Enroll in the required Marketplace training (i.e., Individual and/or SHOP) on the MLMS or through a CMS-approved vendor via the CMS Enterprise Portal
3. Complete the applicable training courses and pass the exams through the MLMS or through a CMS-approved vendor via the CMS Enterprise Portal
4. Read and accept the applicable Marketplace Agreement(s) on the MLMS

Agents and brokers who participated in the FFMs during plan year 2016 already have an agent/broker profile on the MLMS, and those that participated in the Individual Marketplace are eligible to take streamlined Refresher Training to complete the plan year 2017 Individual Marketplace training requirement.

Registration and Training Overview (continued)

While most of the registration steps are the same as in plan year 2016, there are a few new features for plan year 2017:

New Features for FFM Agent and Broker Registration for Plan Year 2017

Plan Year 2017	Plan Year 2016
Identity proofing must be completed before an agent or broker is able to access the MLMS.	Identity proofing could be completed before or after completing FFM training.
Registration Completion Certificates will include the date when the agent or broker completes the plan year 2017 FFM registration requirement.	Registration Completion Certificates did not include the date that the agent or broker completed the plan year 2016 FFM registration requirement.

Registration and Training Overview (continued)

- For plan year 2017, CMS has 11 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 Insurance Affordability Programs
  - Individual Marketplace Enrollment
  - Privacy Standards and Definitions
  - Protecting and Handling Personally Identifiable Information (PII)
  - Information Security
  - SHOP Marketplace Employer
  - SHOP Marketplace Qualified Employee
- CMS will only be offering training in English for plan year 2017.

Depending on the market segment (i.e., individual or SHOP Marketplace) in which an FFM-registered agent or broker is assisting consumers, the training requirements vary.

Registration and Training Overview (continued)

CMS has four exams associated with the training modules:

- Affordable Care Act and Marketplace Basics
- Individual Marketplace
- Privacy and Security Standards
- SHOP Marketplace

Registration and Training Overview (continued)

While most of the training content is the same as in plan year 2016, there are a few new features for plan year 2017:

New Features for FFM Agent and Broker Training for Plan Year 2016

Plan Year 2017	Plan Year 2016
Agents and brokers who participated in the FFMs for the Individual Marketplace for plan year 2016 are eligible to take a streamlined Refresher Training, either through the MLMS or a CMS-approved vendor, regardless of who they completed the plan year 2016 training through.	Agents and brokers who participated in the FFMs for the Individual Marketplace for the previous plan year had to retake the full agent and broker training for the current plan year.
CMS-approved vendors automatically send records of training completions to the MLMS.	Agents and brokers had to enter confirmation codes into the MLMS to confirm completion of CMS-approved vendor training.
Agents and brokers choosing training through the MLMS will enroll in curricula; course-level enrollment is not available.	Agents and brokers choosing training through the MLMS could enroll by course, potentially leading to confusion about which courses to enroll in.

Registration and Training Overview (continued)

Agents and brokers must execute the Agreement(s) associated with the Marketplace(s) they are participating in:

- **Individual Marketplace General Agreement:** Includes terms for complying with federal and state laws, rules, standards, and policies.

- **Individual Marketplace Privacy and Security Agreement:** Includes privacy and security policies for protecting consumers' PII. The FFM privacy standards are consistent with the eight principles outlined in 45 CFR 155.260(a).

- **SHOP Marketplace Privacy and Security Agreement:** Includes privacy and security policies for protecting consumers' PII. The FFM privacy standards are consistent with the eight principles outlined in 45 CFR 155.260(a).

Registration and Training Overview (continued)

Upon successful completion of the FFM registration requirement, an agent or broker is able to generate a Registration Completion Certificate specific to the market segment(s) (i.e., individual and/or SHOP Marketplaces) for which he or she signed the Agreement(s).

- The QHP issuer(s) with which an agent or broker is affiliated may request to view his or her Registration Completion Certificate(s).
- However, QHP issuers are instructed to review the Agent and Broker FFM Registration Completion and Termination Lists published by CMS via the Agents and Brokers Resources webpage at http://go.cms.gov/CCIIOAB to confirm the current registration status of agents and brokers.

Ensuring Agents' or Brokers' NPNs Are Associated with Their Profiles

Agents and brokers must enter a correct NPN in their MLMS profiles to receive credit for completing FFM 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 an agent's or broker's state license number. Agents and brokers should be sure to use their NPNs, not a state license number.
- To update the NPN, agents and brokers can select the "Complete Agent Broker Training" hyperlink and update the information in their MLMS profiles.
- Agent and broker NPNs can be found at: www.nipr.com/PacNpnSearch.htm.

Agents and brokers should confirm their NPNs are correct in their MLMS profiles. Entering an inaccurate NPN could result in denial of compensation/credit by an issuer.

Plan Year 2017 FFM Registration and Training for Agents and Brokers New to the FFMs

FFM Agent and Broker CMS-approved Vendor Training Option

CMS-approved Vendor Training Option

- Agents and brokers who chose to complete training through a CMS-approved vendor must access the vendor's training via the CMS Enterprise Portal and should <u>not</u> go directly to the vendor's website to access the training content.
- CMS-approved vendors may charge a fee to agents and brokers that choose to take their training.
- Agents and brokers who complete FFM training through a CMS-approved vendor still need to execute the applicable Agreement(s) on the MLMS prior to assisting consumers seeking to enroll in coverage through the FFMs.

CMS-approved Vendor Training Option (continued)

The benefits of completing training through a CMS-approved vendor include:

- CMS-approved vendors are required to offer continuing education unit (CEU) credits in a minimum of five states where the FFMs are operating (45 CFR § 155.222). The states where CEUs are offered may vary by CMS-approved vendor. Note: information on CEUs offered by each CMS-approved vendor is found in the CMS Enterprise Portal "Agent/Broker Training Options" page by selecting on the "Learn More" link.
- Completion of a training curriculum, including the associated exams, through one of the CMS-approved vendors fulfills the FFM training requirement for agents and brokers registering to participate in the Individual Marketplace.
- CMS-approved vendors are required to cover, at a minimum, the same topic areas that are covered in the CMS training.
- All CMS-approved vendors offer Refresher Training to returning Individual Marketplace agents and brokers.

Plan Year 2017 FFM Registration and Training for Agents and Brokers
New to the FFMs

FFM Agent and Broker Registration and Training Steps

Steps for Registration and Training Completion

New agents and brokers must complete seven steps to become registered to participate in the FFMs for plan year 2017:

1. Create a CMS Enterprise Portal account
2. Request the FFM Agent/Broker role
3. Conduct identity proofing within the CMS Enterprise Portal
4. Complete an MLMS profile
5. Complete training*
6. Execute Agreement(s)
7. Confirm completion of all registration steps by logging back in to the "Agent/Broker Registration Status" page on the CMS Enterprise Portal

** CMS recommends that agents and brokers who choose to take training via a CMS-approved vendor complete training prior to completing their profile information.*

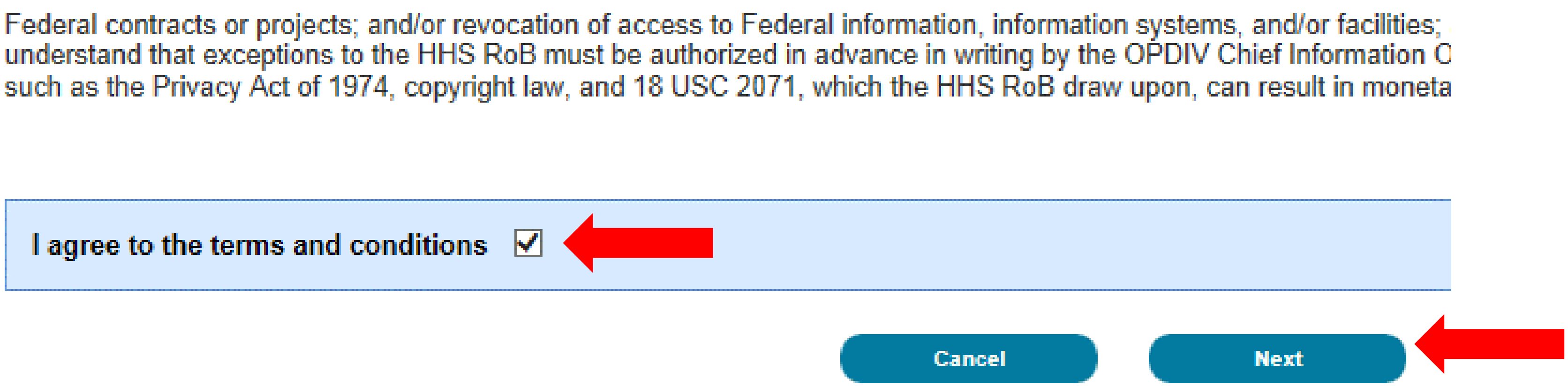
Step 1: Agent or Broker Creates a CMS Enterprise Portal Account

Once at https://portal.cms.gov, select the “New User Registration” link.

Important: Agents and brokers who have an existing CMS Enterprise Portal account should not create a new account. If you are unsure if you already have a FFM User ID and password, see the resource “Avoiding the Creation of a Duplicate CMS Enterprise Portal Account.”

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

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 the "Next" button.



Important: *Agents and brokers who have an existing CMS Enterprise Portal account should not create a new account.*

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

Enter all personal information and then select the “Next” button.

Important: *Agents and brokers who have an existing CMS Enterprise Portal account should not create a new account.*

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

- Create an FFM User ID and password.
- Choose challenge questions and provide answers.
- Then select the “Next” button.

Important: *Agents and brokers who have an existing CMS Enterprise Portal account should not create a new account.*

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

- The CMS Enterprise Portal will notify you that the account was created and then you can select the "OK" button.
- You will receive an email to the address you listed in your account, notifying you your account was successfully created.

***Important**: Agents and brokers who have an existing CMS Enterprise Portal account should not create a new account.*

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 the "Login to CMS Secure Portal" button at https://portal.cms.gov.

Agents and brokers who have an existing FFM Agent/Broker Role do not need to request it again.

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

Read the terms and conditions and accept them by selecting the “I Accept” button.

By using this information system, you understand and consent to the following:

You have no reasonable expectation of privacy regarding any communication or data transiting or stored on this information system.

At any time, and for any lawful Government purpose, the government may monitor, intercept, and search and seize any communication or data transiting or stored on this information system.

Any communication or data transiting or stored on this information system may be disclosed or used for any lawful Government purpose.

To continue, you must accept the terms and conditions. If you decline, your login will automatically be cancelled.

I Accept | Decline

Agents and brokers who have an existing FFM Agent/Broker Role do not need to request it again.

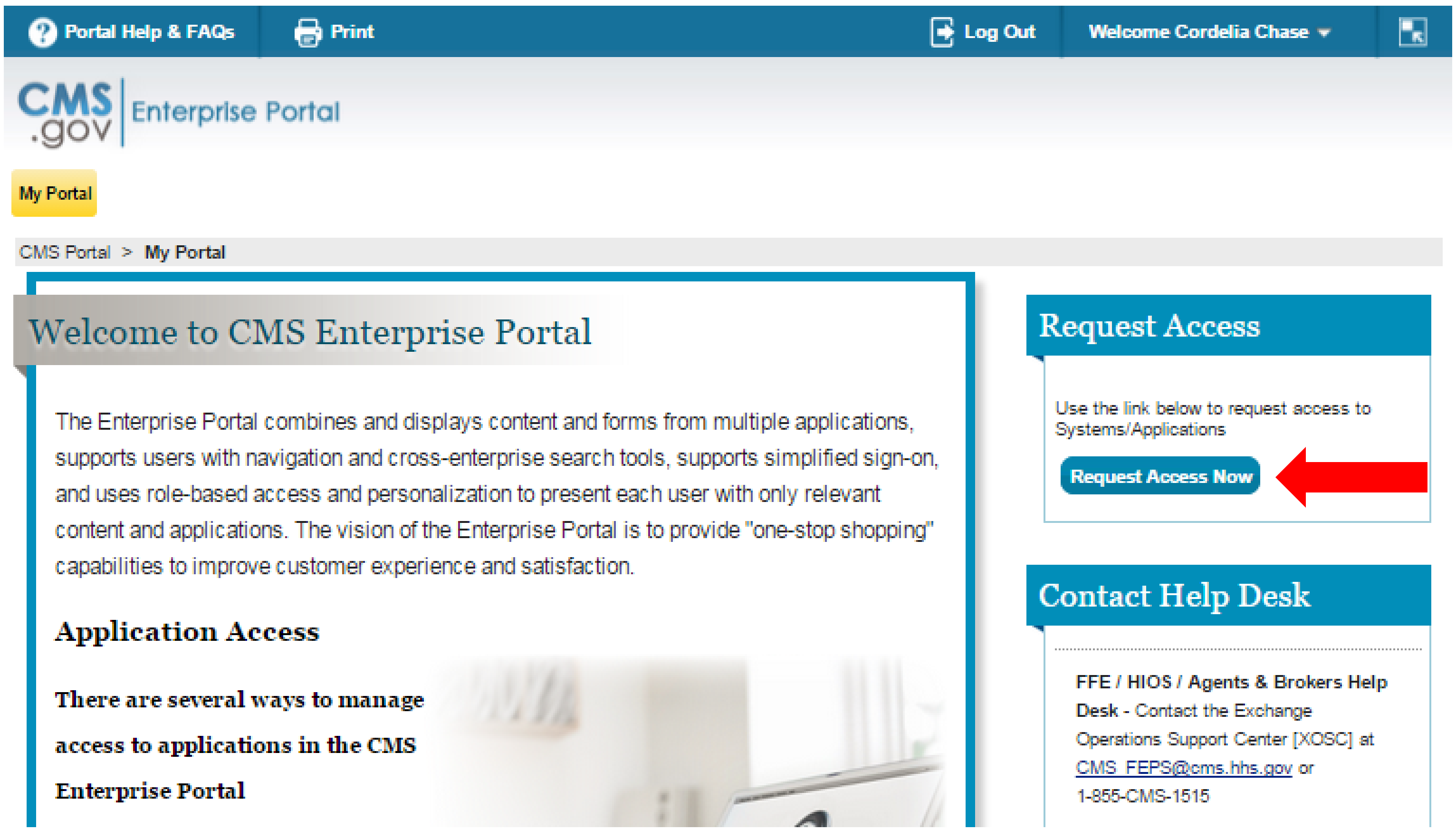
Step 2: Agent or Broker Requests the FFM Agent/Broker Role (continued)

- Enter your FFM User ID and the password you created when setting up your CMS Enterprise Portal account in Step 1.
- Then select the "Log In" button.

Agents and brokers who have an existing FFM Agent/Broker Role do not need to request it again.

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

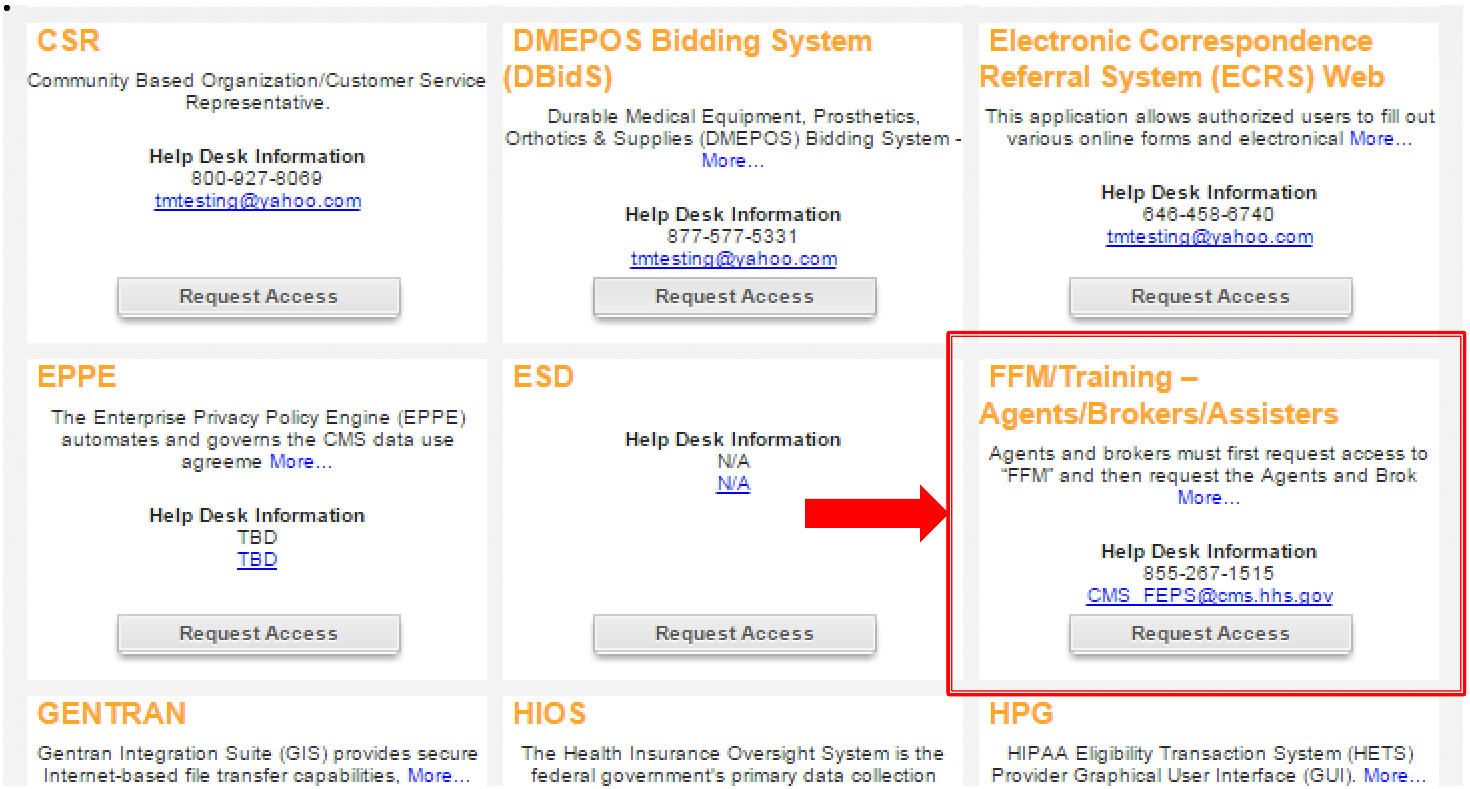
Select the “Request Access Now” button.



Agents and brokers who have an existing FFM Agent/Broker Role do not need to request it again.

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

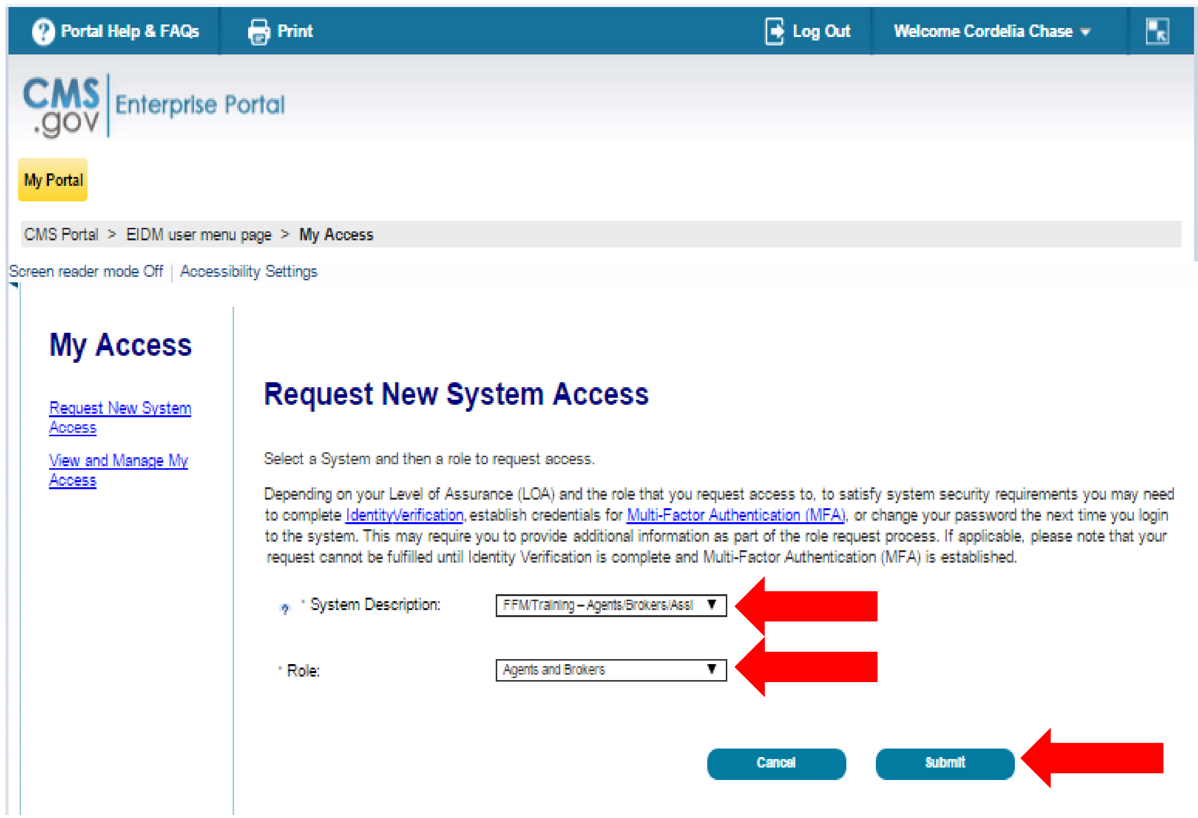
Scroll down the list of roles, or enter “F” in the search box at the top, to find the “FFM/Training – Agents/Brokers/Assisters” role and then select “Request Access.”



Agents and brokers who have an existing FFM Agent/Broker Role do not need to request it again.

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

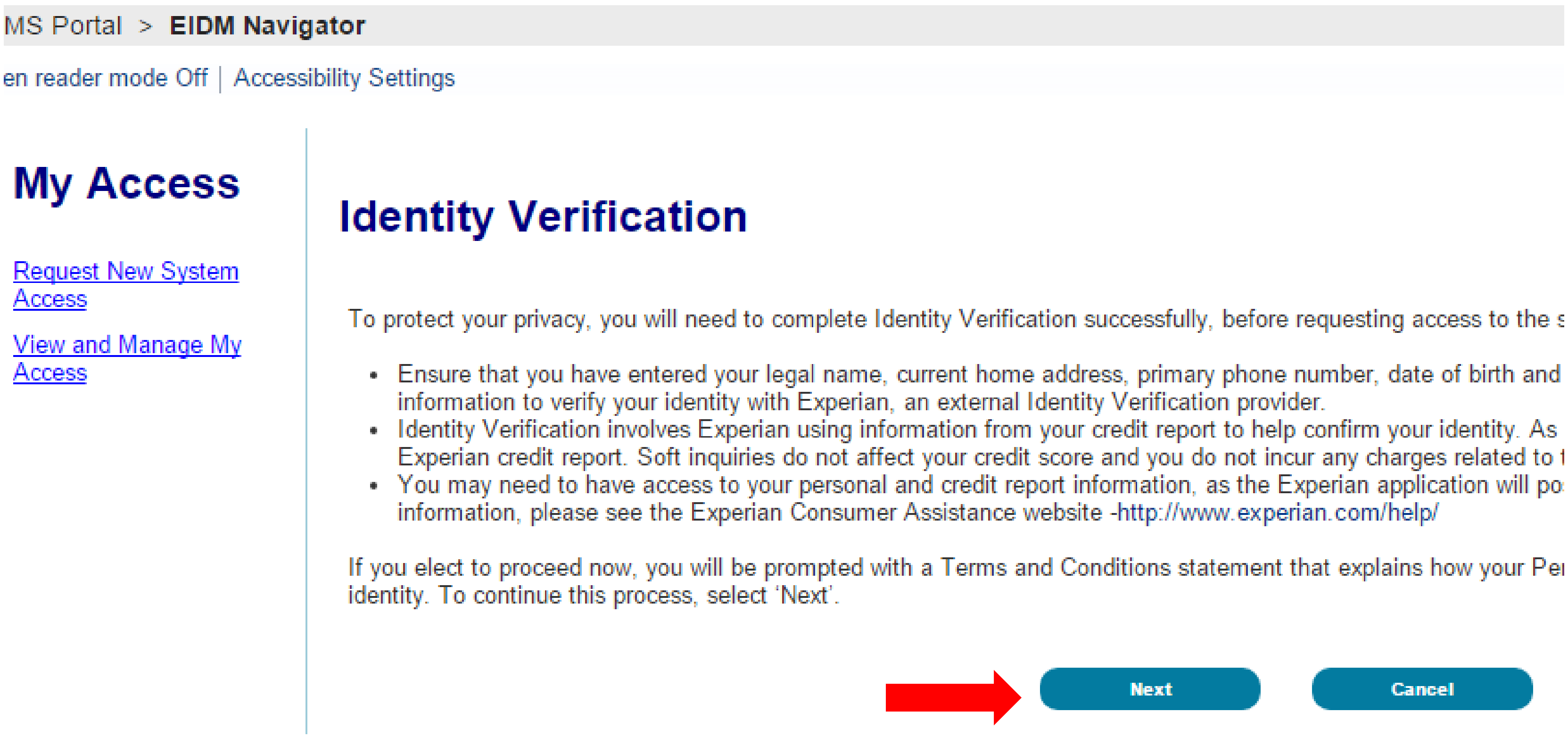
- Select “FFM/Training – Agents/Brokers/Assisters” from the “System Description” drop-down menu.
- Then select “Agents and Brokers” from the “Role” drop-down menu.
- Select the “Submit” button.



Agents and brokers who have an existing FFM Agent/Broker Role do not need to request it again.

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

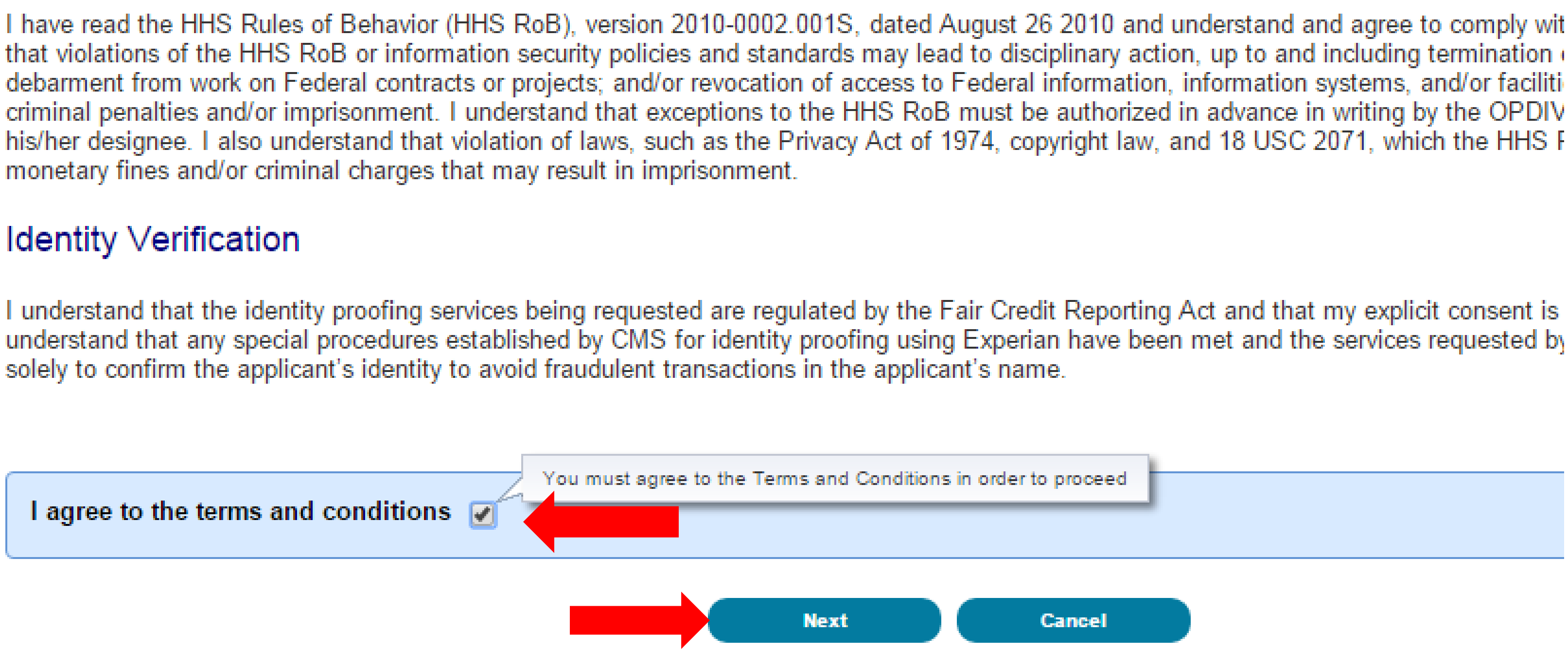
After selecting “Submit,” you will be prompted to complete Identity Proofing. Read the instructions and then select the “Next” button.



Agents and brokers who have an existing CMS Enterprise Portal account do not need to complete identity proofing again.

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

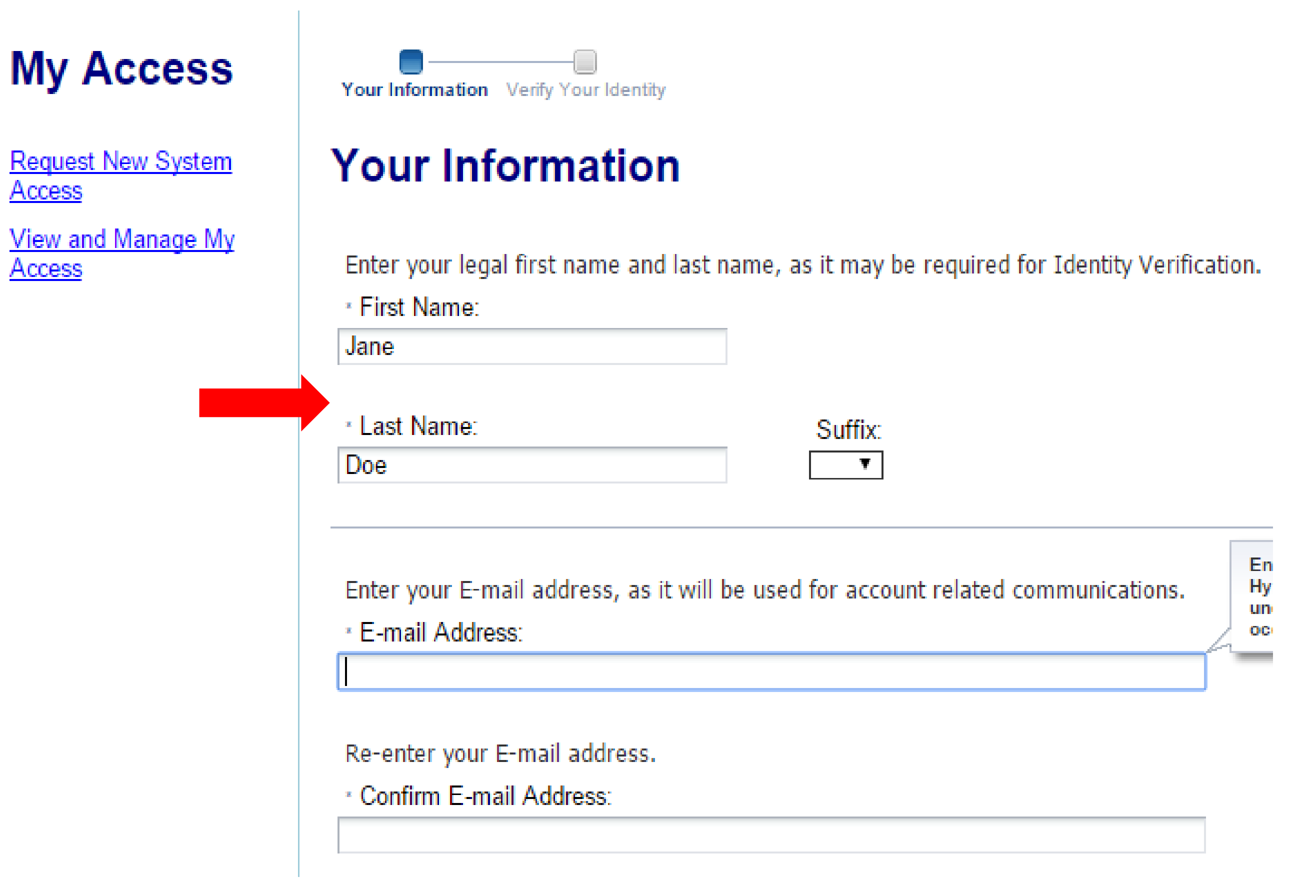
Read the terms and conditions and accept them by selecting the check box next to “I agree to the terms and conditions,” and then select the “Next” button.



Agents and brokers who have an existing CMS Enterprise Portal account do not need to complete identity proofing again.

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

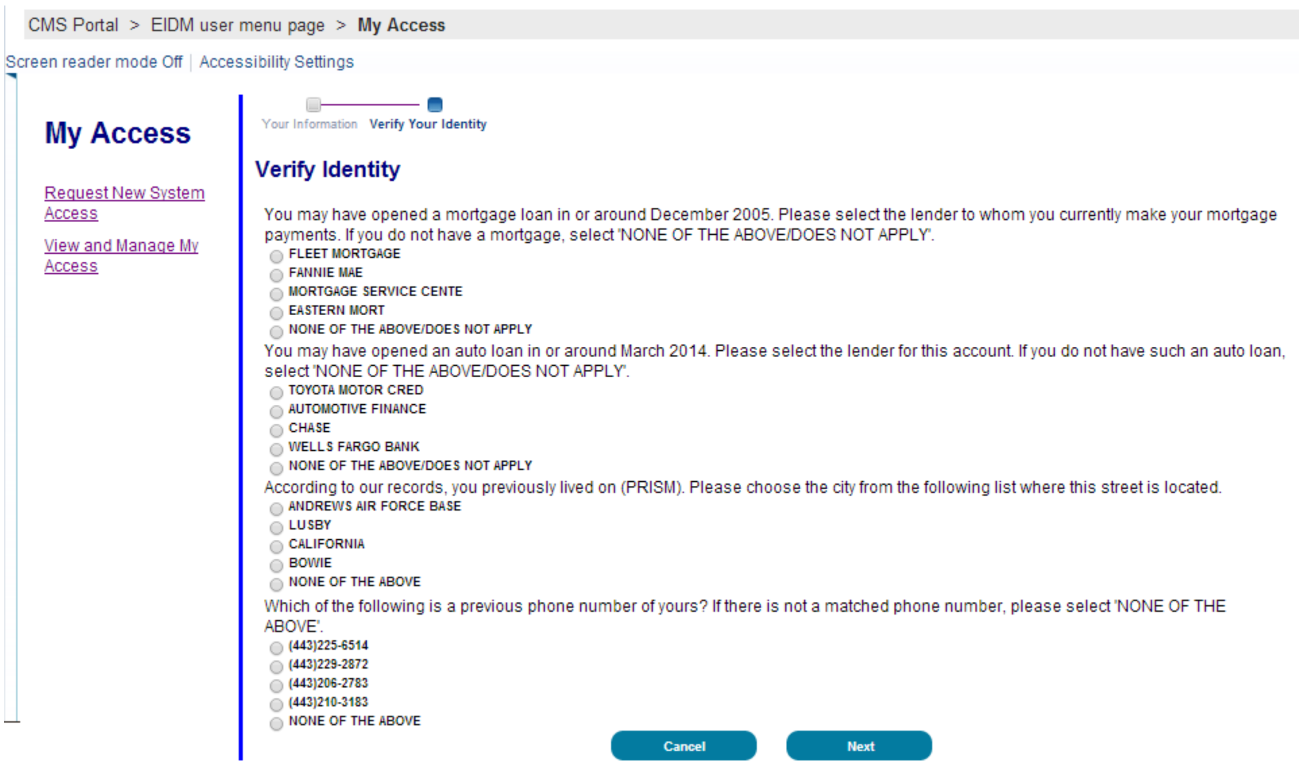
- Confirm the information that automatically populates and enter any missing information (e.g., confirm email address, enter Social Security number).
- Then select the “Next” button to submit your information for verification.



Agents and brokers who have an existing CMS Enterprise Portal account do not need to complete identity proofing again.

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

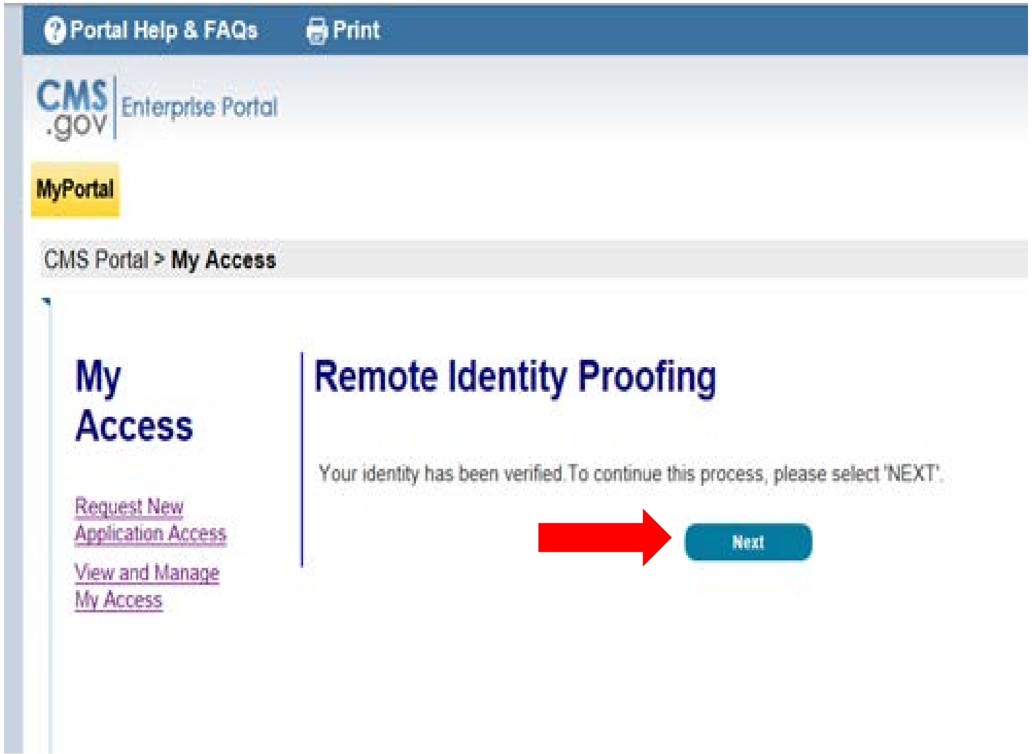
Provide valid answers for the ‘Out-of-Wallet’ questions and select “Next.”



Agents and brokers who have an existing CMS Enterprise Portal account do not need to complete identity proofing again.

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

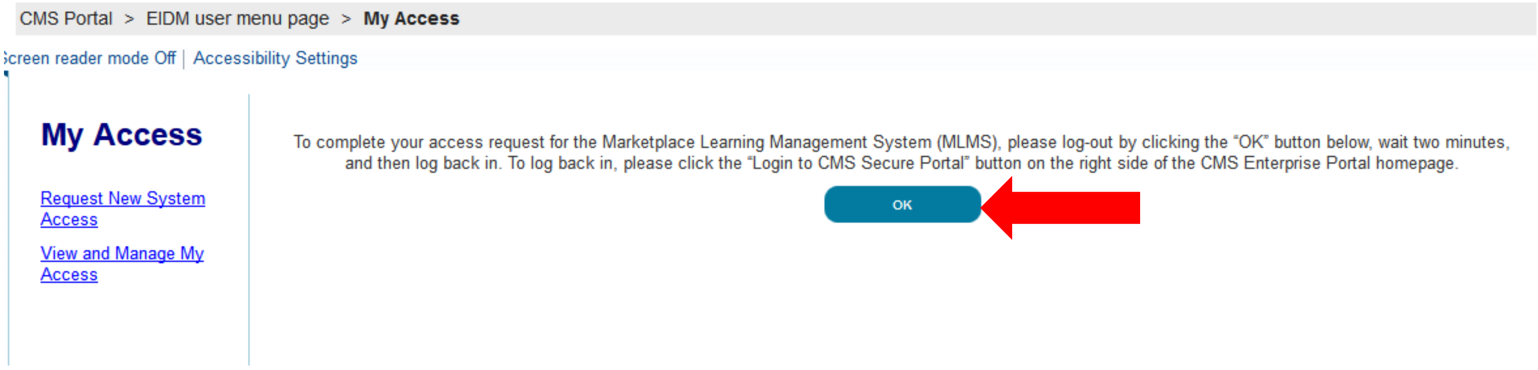
- After you receive confirmation that your identity has been verified, select the “Next” button.
- If your information cannot be verified remotely (i.e., electronically), the CMS Enterprise Portal will provide you with a phone number and code to confirm your identity directly with Experian, CMS’ identity proofing vendor.



Agents and brokers who have an existing CMS Enterprise Portal account do not need to complete identity proofing again.

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

You will then receive a logout message. Select "OK," and you will be logged out and redirected to the CMS Enterprise Portal homepage.



Agents and brokers who have an existing CMS Enterprise Portal account do not need to complete identity proofing again.

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 the Agreement(s) after you have completed training.
- To complete your MLMS profile, you will need to enter Agent/Broker profile information, including your NPN and "Find Local Help" listing preference, in the MLMS.

**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 to access both the CMS-developed training and training offered through CMS-approved vendors, log back into the CMS Enterprise Portal using the User ID and password you created in Step 1.
- You will be redirected to the "Agent/Broker Registration Status Page." Select the "Complete Agent Broker Training" link.

Agent Broker Registration Status

Plan Year 2017

Please click the link below next to items marked 'INCOMPLETE' to register as an agent/broker for the 2017 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
• SHOP	
3.Print Certificate(s)	Accessible after completing steps 1 & 2.

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

- To access the 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.
- Note that this is also the page where agents and brokers may access training via CMS-approved vendors.

Plan Year 2017 Agent/Broker Training Options

Agents and brokers have new options to complete Individual Marketplace and/or SHOP Marketplace training for the 2017 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.

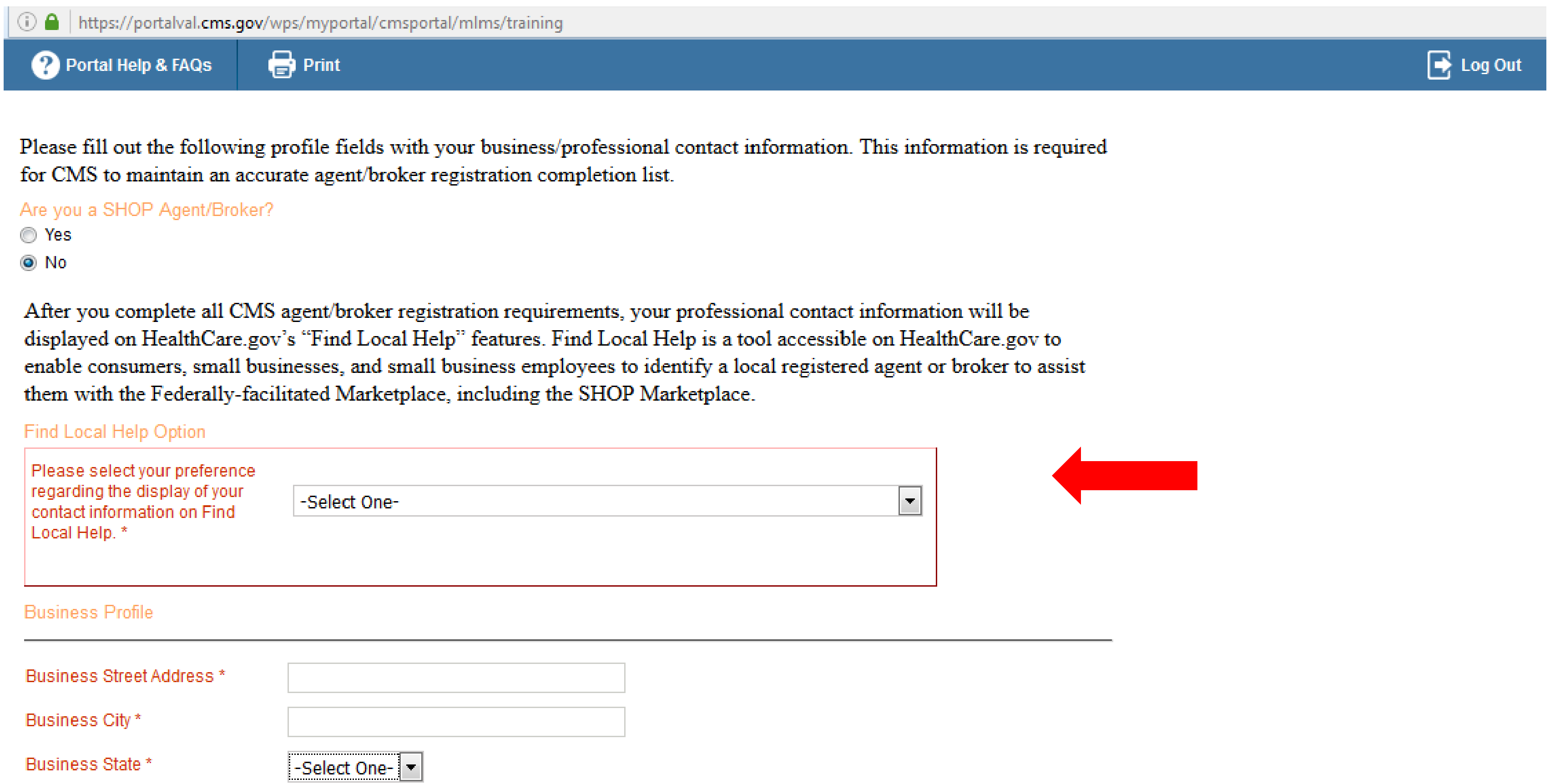
If you select a vendor to complete training, you are consenting to being securely redirected to that third-party vendor's site. After you complete training, you will receive a training completion confirmation code and instructions to access the MLMS (i.e., CMS's system) to complete the agent/broker registration process.

- CMS-approved Vendor Options   Learn More   Access Training   555-555-1213
- Marketplace Learning Management System (CMS)   Access Training   MLMSHelpDesk@cms.hhs.gov

Return to Agent Broker Registration Status Page

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

Once the MLMS profile page appears in a separate window, complete your profile information.



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 NPN by selecting the appropriate "Click Here" link at the bottom of the profile page.
- 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.
- You can list up to three NPNs in one profile.

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 click here 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).

Web-Based Entity Profile

If you are the authorized individual of record completing CMS agent/broker registration on behalf of a Web-based entity (e.g., a Web-broker), then please click here to provide additional information. Please note there should only be one individual acting as the authorized representative of any Web-based entity for this purpose (being affiliated with a Web-based entity for a purpose other than completing agent/broker registration for that entity is not reason to click the link above).

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

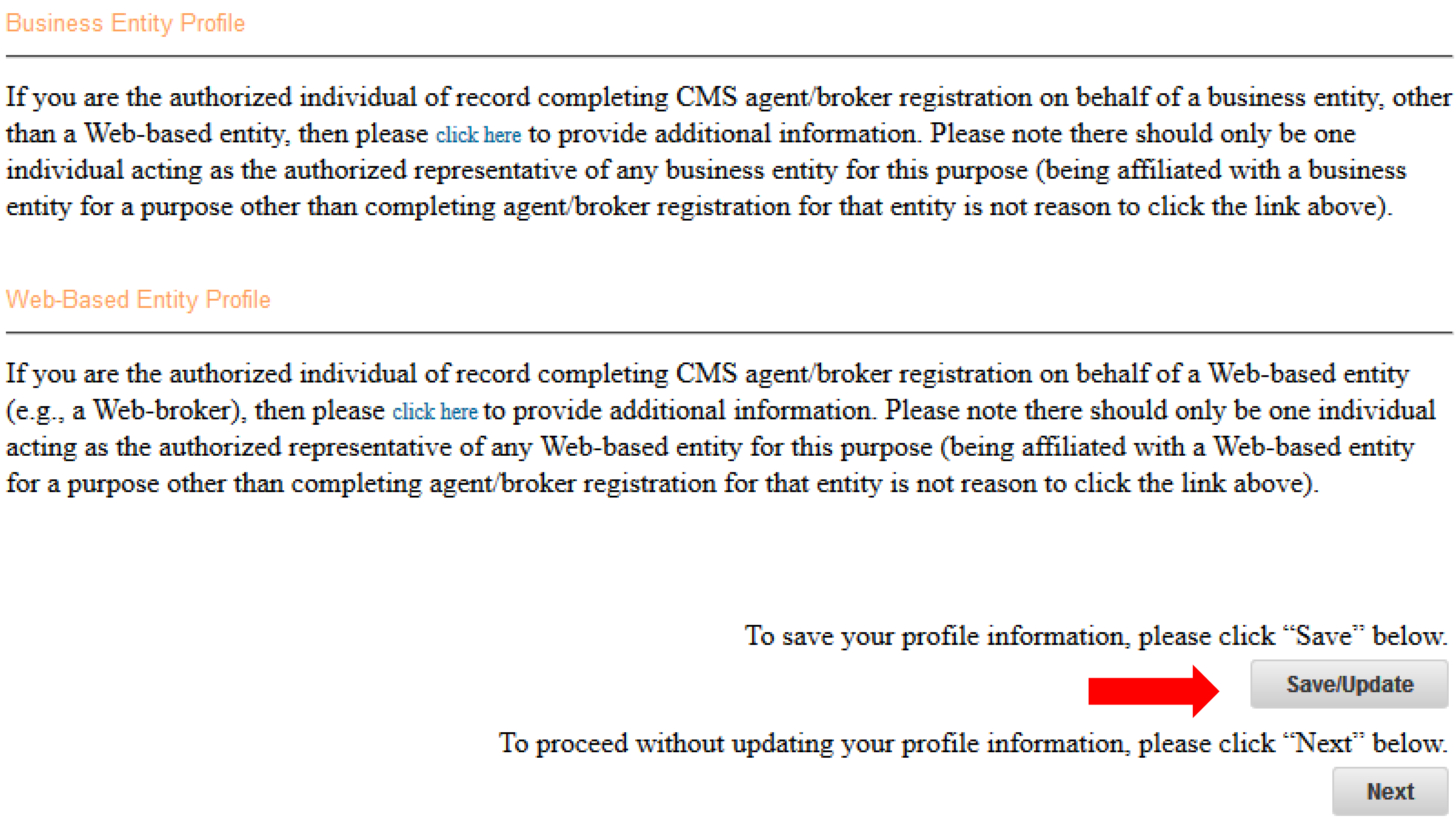
An additional set of information fields will appear. Enter the information for the web-broker or business entity with which you are affiliated.

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 click here 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) (1-10 numeric characters not starting with zero) *	
Confirm NPN *	
Business entity states of licensure: (Please select at least one state in which this business entity is licensed or otherwise authorized to operate as an insurance producer.) *	-Select One- -Select One- -Select One- -Select One- -Select One-

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

Once you have entered all your profile information, select the "Save/Update" button and then select "Next."



Step 5: Agent or Broker Completes Training

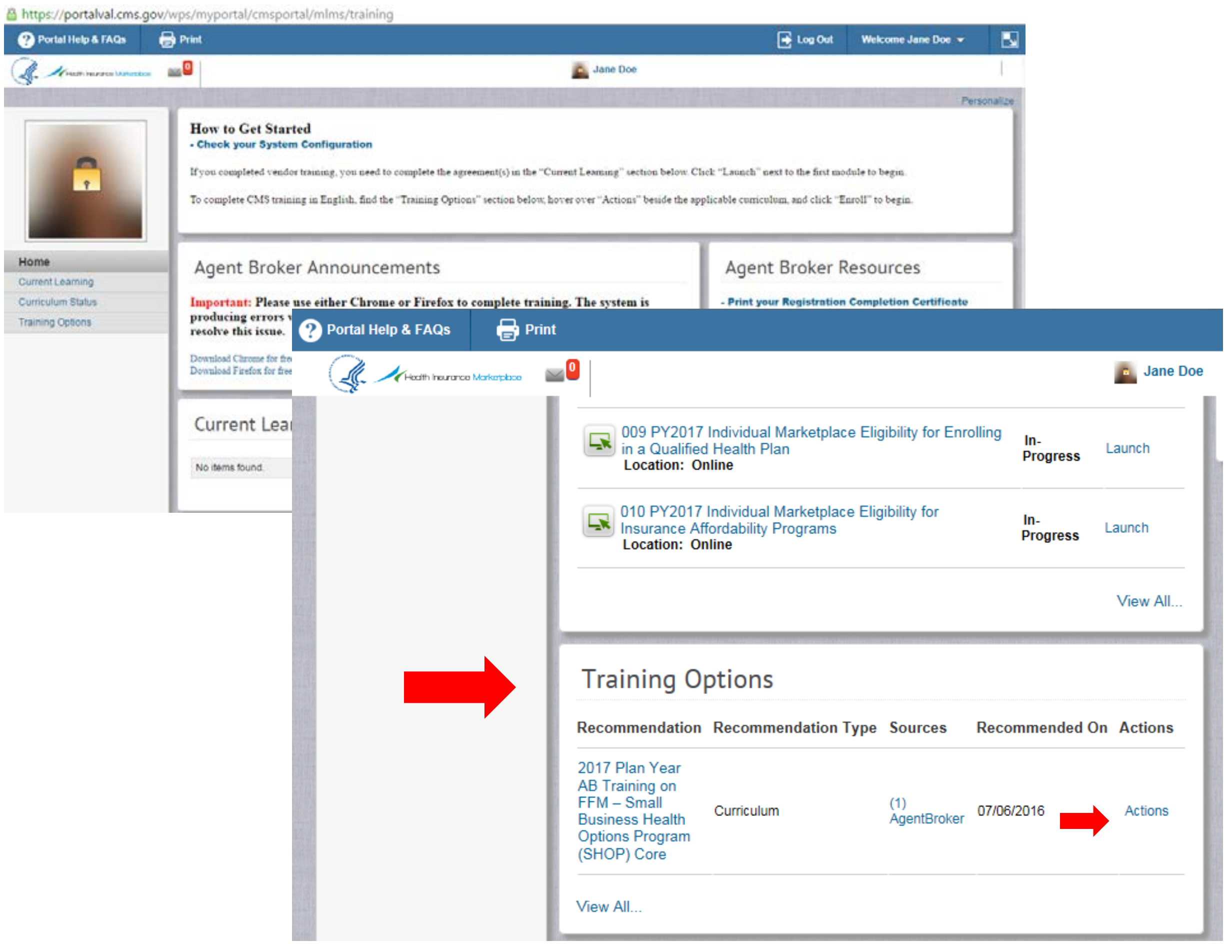
The steps for completing agent and broker training differ depending upon the training option an agent or broker chooses. Agents and brokers have two options for training via the CMS Enterprise Portal:

- CMS-developed training through the MLMS
- Training offered through CMS-approved vendors

We will first walk through the steps for completing training through the MLMS in Step 5a, and will then discuss the process for completing training via a CMS-approved vendor in Step 5b.

Step 5a: Agent or Broker Completes MLMS Training

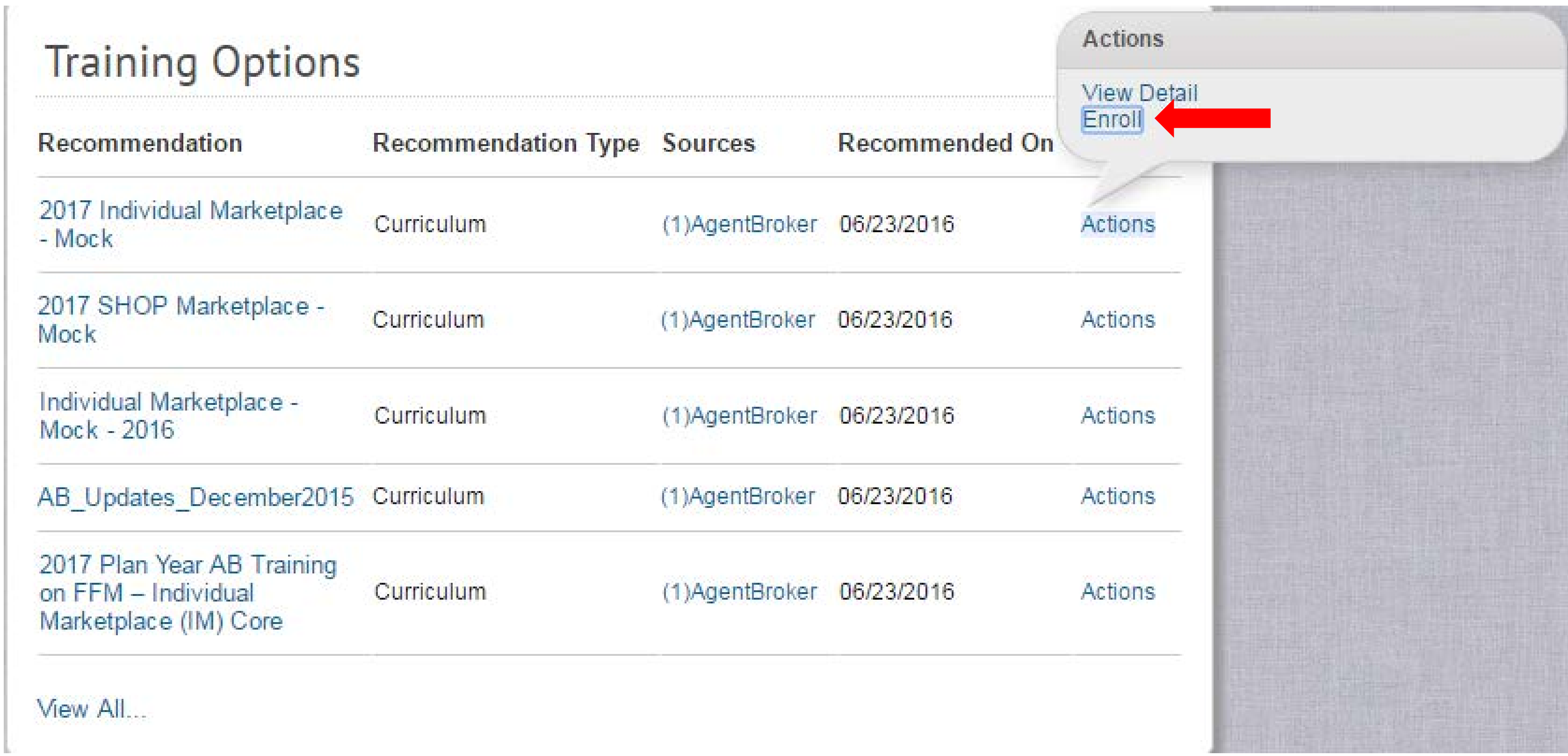
- After completing your MLMS Profile, you will be redirected to the "MLMS Landing Page" on the MLMS. Scroll down to find "Training Options."
- Identify the curriculum you wish to enroll in, and hover your cursor over the "Actions" link to the right of that curriculum.



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)

In the “Actions” bubble, select the "Enroll“ link.



Training Options

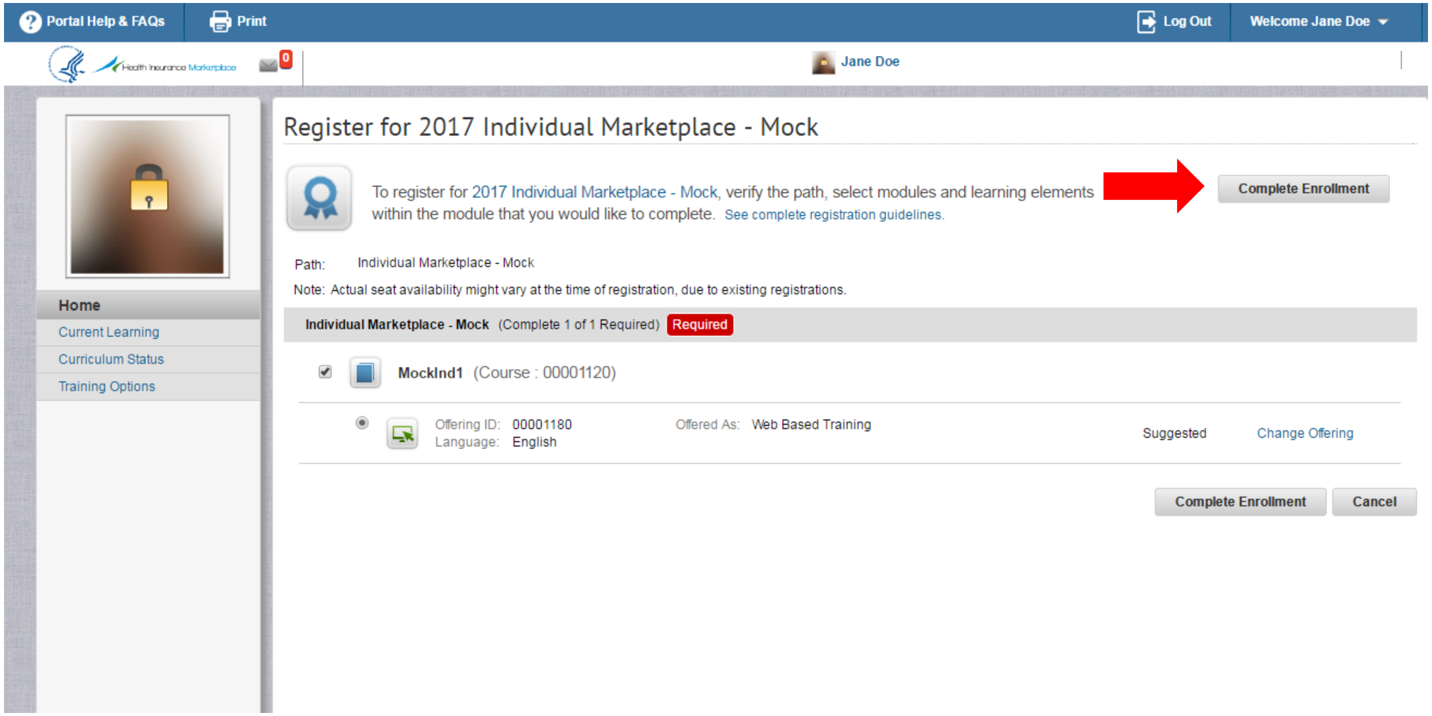
Recommendation	Recommendation Type	Sources	Recommended On	
2017 Individual Marketplace - Mock	Curriculum	(1)AgentBroker	06/23/2016	Actions
2017 SHOP Marketplace - Mock	Curriculum	(1)AgentBroker	06/23/2016	Actions
Individual Marketplace - Mock - 2016	Curriculum	(1)AgentBroker	06/23/2016	Actions
AB_Updates_December2015	Curriculum	(1)AgentBroker	06/23/2016	Actions
2017 Plan Year AB Training on FFM – Individual Marketplace (IM) Core	Curriculum	(1)AgentBroker	06/23/2016	Actions

View All...

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)

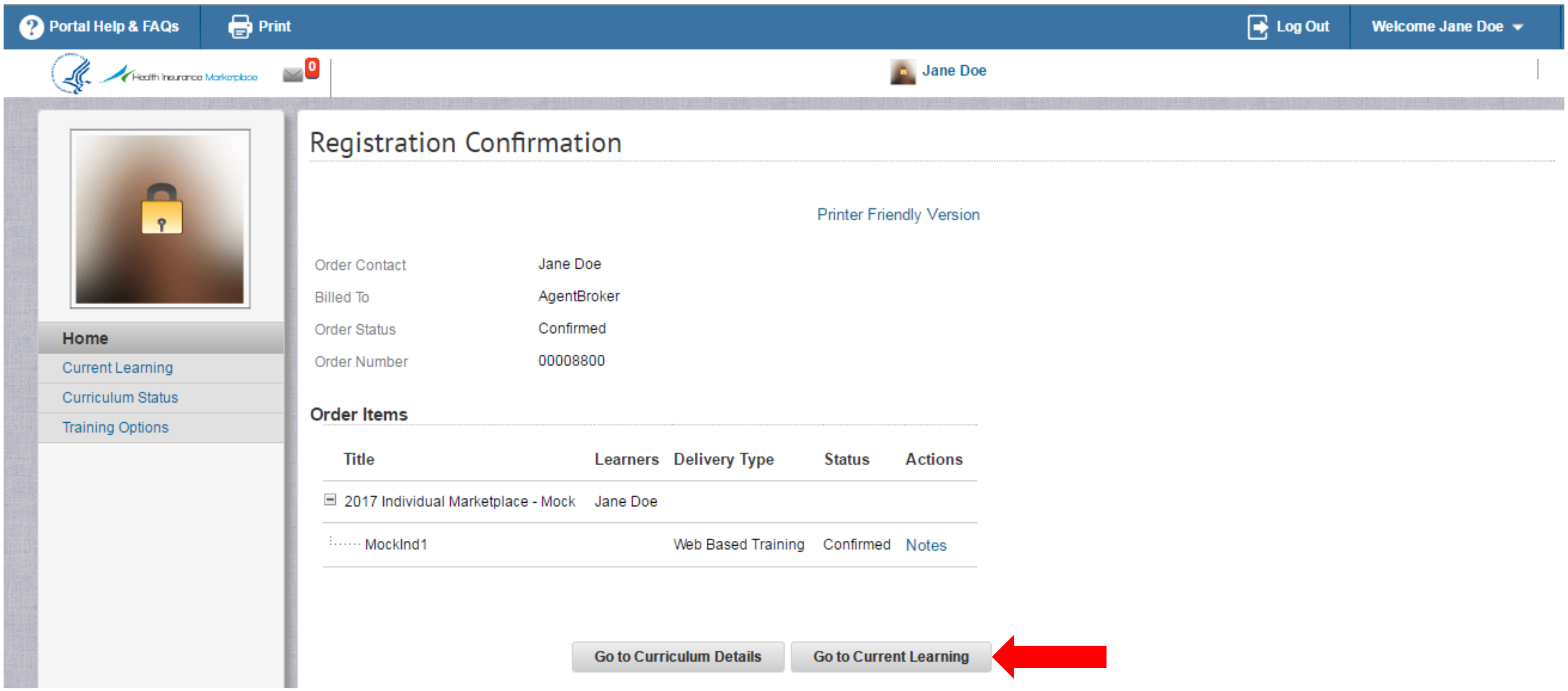
A page will open with the selected curriculum and will include a list of the modules it includes. Select the "Complete Enrollment" button at the top of the screen.



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 the “Go to Current Learning” button at the bottom of the page.

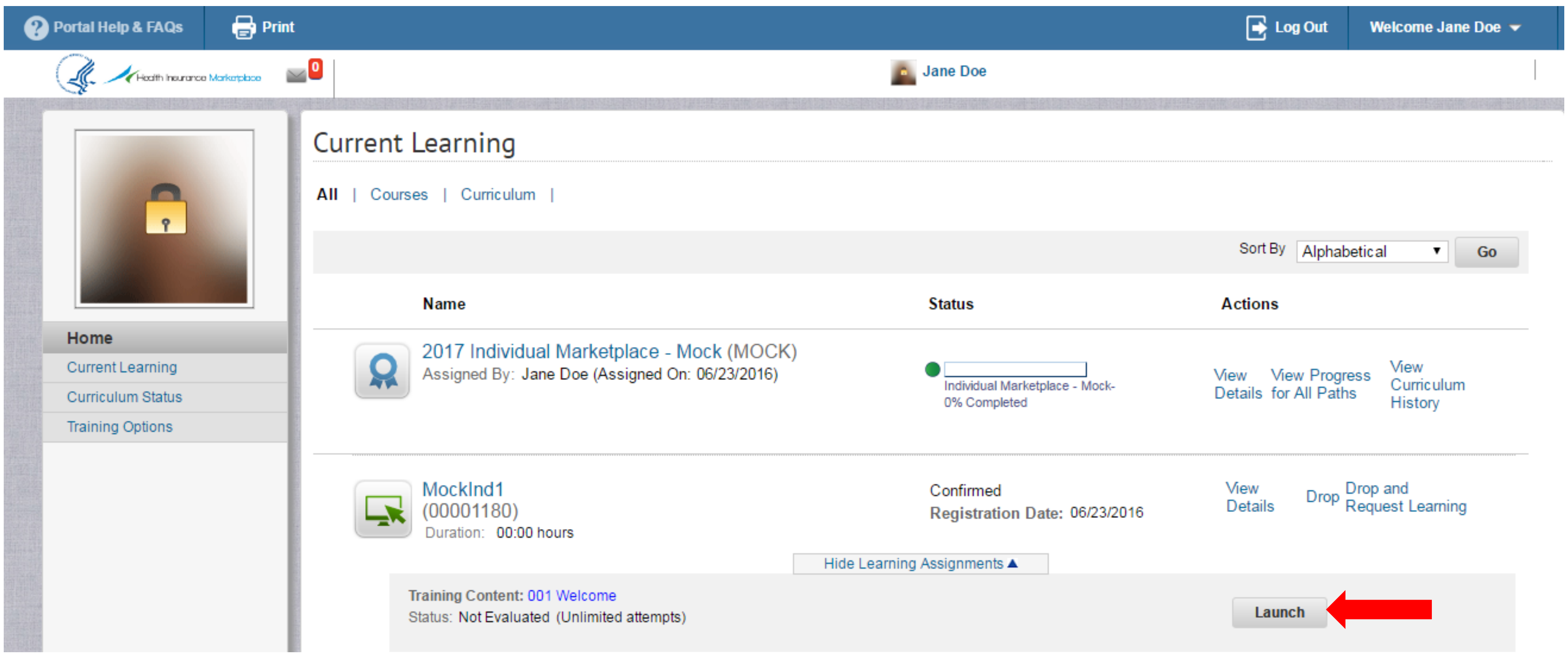


These screenshots are from the MLMS and apply to the CMS-developed training. If you chose to take training through a CMS-approved vendor, reference step 5b.

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

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

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



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

- If you chose to take training from one of the CMS-approved vendors, select the "Access Training" link for your chosen vendor and the CMS Enterprise Portal will begin to 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).

Plan Year 2017 Agent/Broker Training Options

Agents and brokers have new options to complete Individual Marketplace and/or SHOP Marketplace training for the 2017 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.

If you select a vendor to complete training, you are consenting to being securely redirected to that third-party vendor's site. After you complete training, you will receive a training completion confirmation code and instructions to access the MLMS (i.e., CMS's system) to complete the agent/broker registration process.

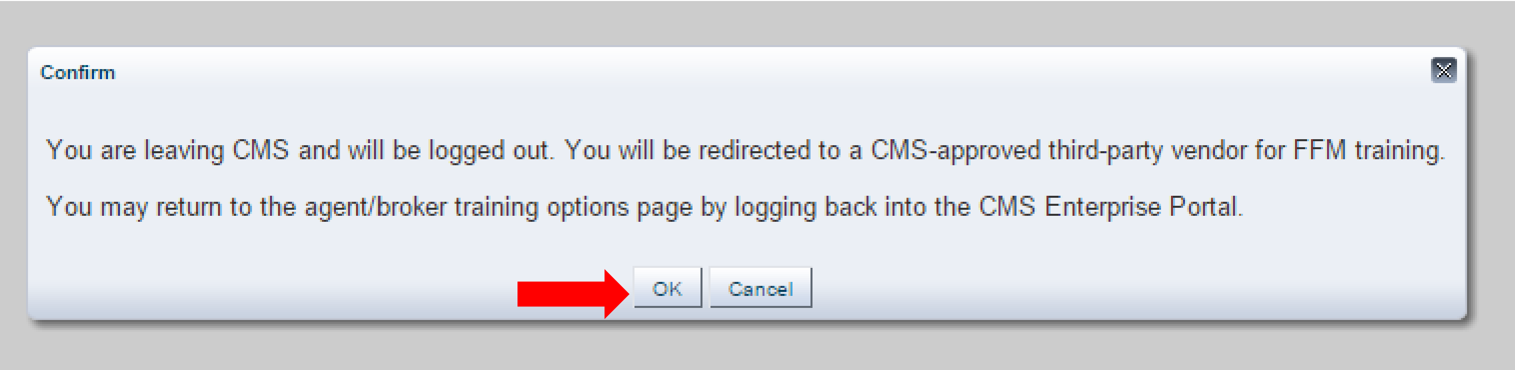
- CMS-approved Vendor Options | Learn More | Access Training | 555-555-1213
- Marketplace Learning Management System (CMS) | Access Training | MLMSHelpDesk@cms.hhs.gov

Return to Agent Broker Registration Status Page

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 the “OK” button 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.



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 have completed 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 FFM Training for the **Federally-Facilitated Individual Marketplace Training**.

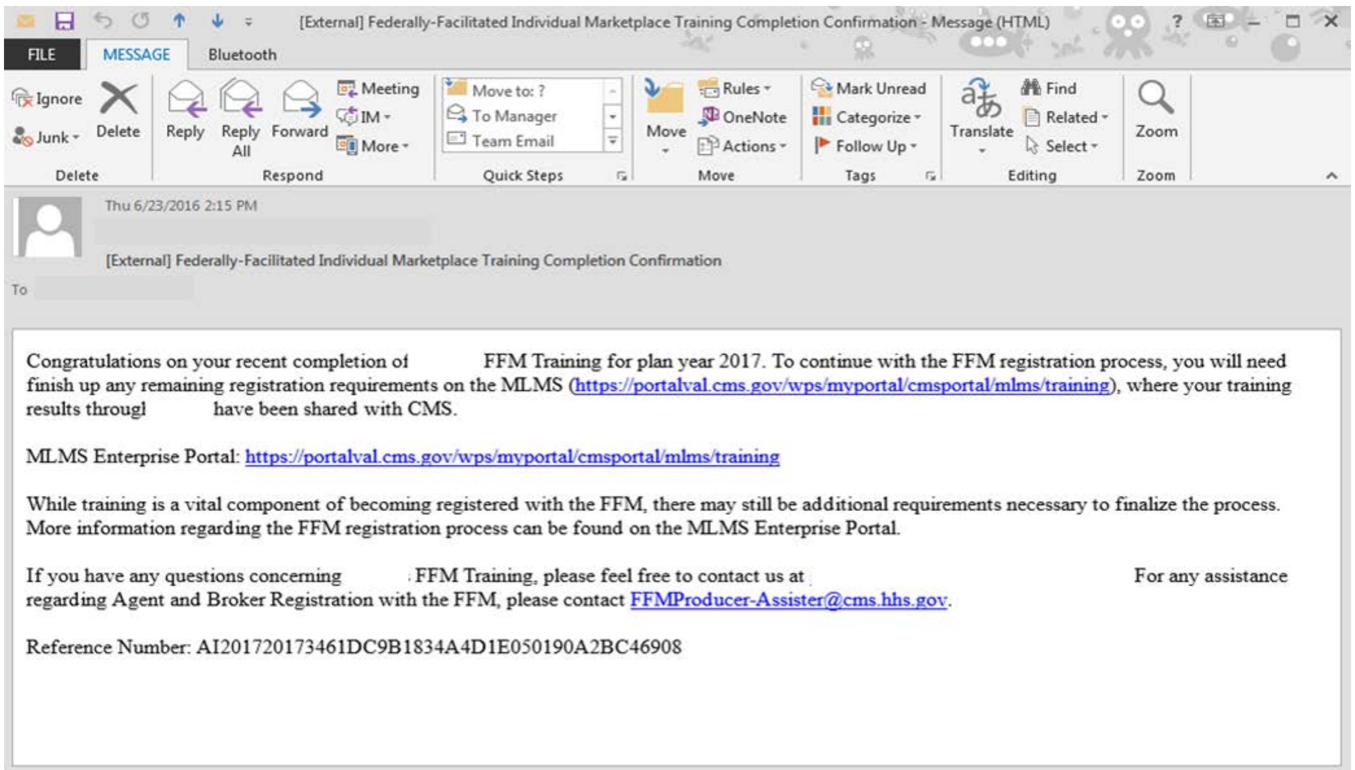
Your results for having satisfied your training requirements through have been shared with CMS. While training is a vital component of becoming registered with the FFM, there may still be additional requirements necessary to finalize the process.
More information regarding the FFM registration process and your next steps can be found on the MLMS Enterprise Portal (https://portal.cms.gov

If you have any questions concerning FFM Training, please feel free to contact us samplevendor@samplevendor.com. For any assistance regarding Agent and Broker Registration with the FFM, please contact FFMProducer-AssisterHelpDesk@cms.hhs.gov

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 how to continue with FFM registration on the MLMS.



Congratulations on your recent completion of FFM Training for plan year 2017. To continue with the FFM registration process, you will need finish up any remaining registration requirements on the MLMS (https://portalval.cms.gov/wps/myportal/cmsportal/mlms/training), where your training results througl have been shared with CMS.

MLMS Enterprise Portal: https://portalval.cms.gov/wps/myportal/cmsportal/mlms/training

While training is a vital component of becoming registered with the FFM, there may still be additional requirements necessary to finalize the process. More information regarding the FFM registration process can be found on the MLMS Enterprise Portal.

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

Reference Number: AI201720173461DC9B1834A4D1E050190A2BC46908

These screenshots only apply to the CMS-developed training. If you want to complete the MLMS training, reference step 5a.

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

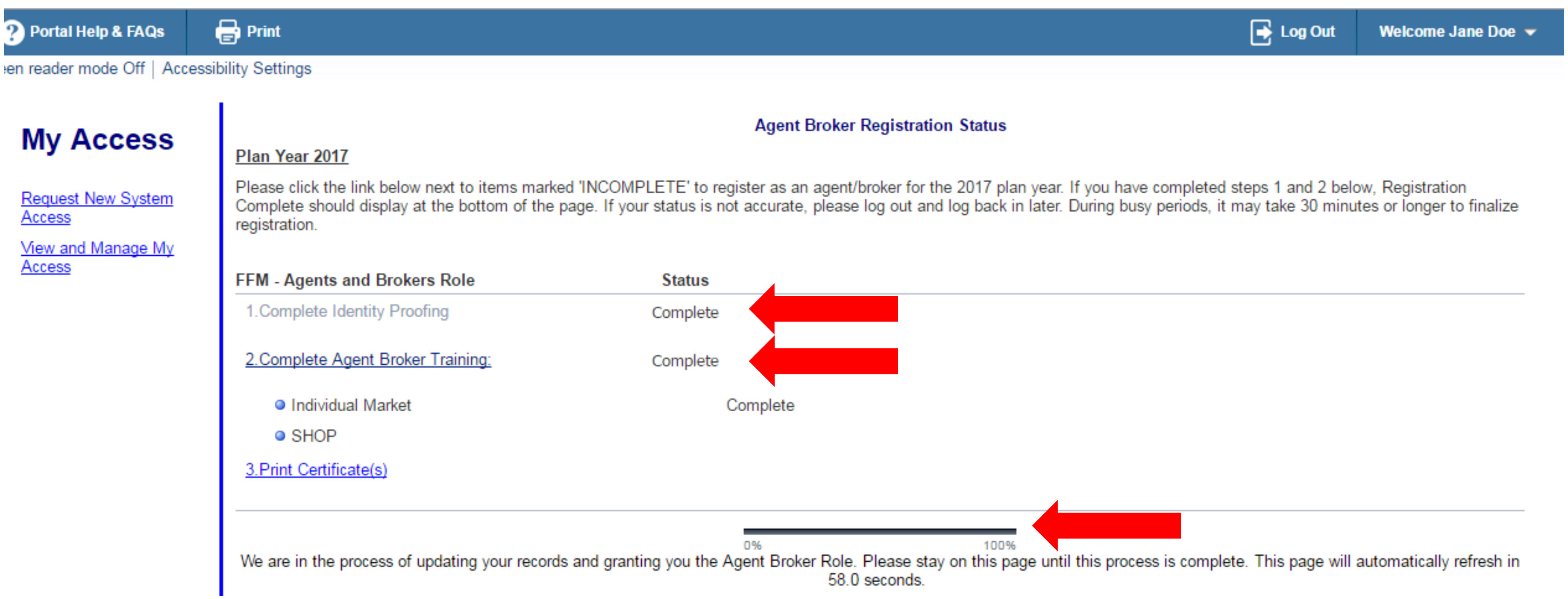
- You must request the Agent/Broker role and complete your profile information, identity proofing, and the required training and exams before you can sign the Agreement(s).
- If you chose to take training from one of the CMS-approved vendors, you will need to log back into the MLMS via the CMS Enterprise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

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 the SHOP Marketplace), you will need to sign the Agreement(s).
- After launching the appropriate Agreement module, review the Agreement language by selecting the "Next" button at the bottom of each screen to advance through the Agreement, and select the "I Agree" button 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% 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.

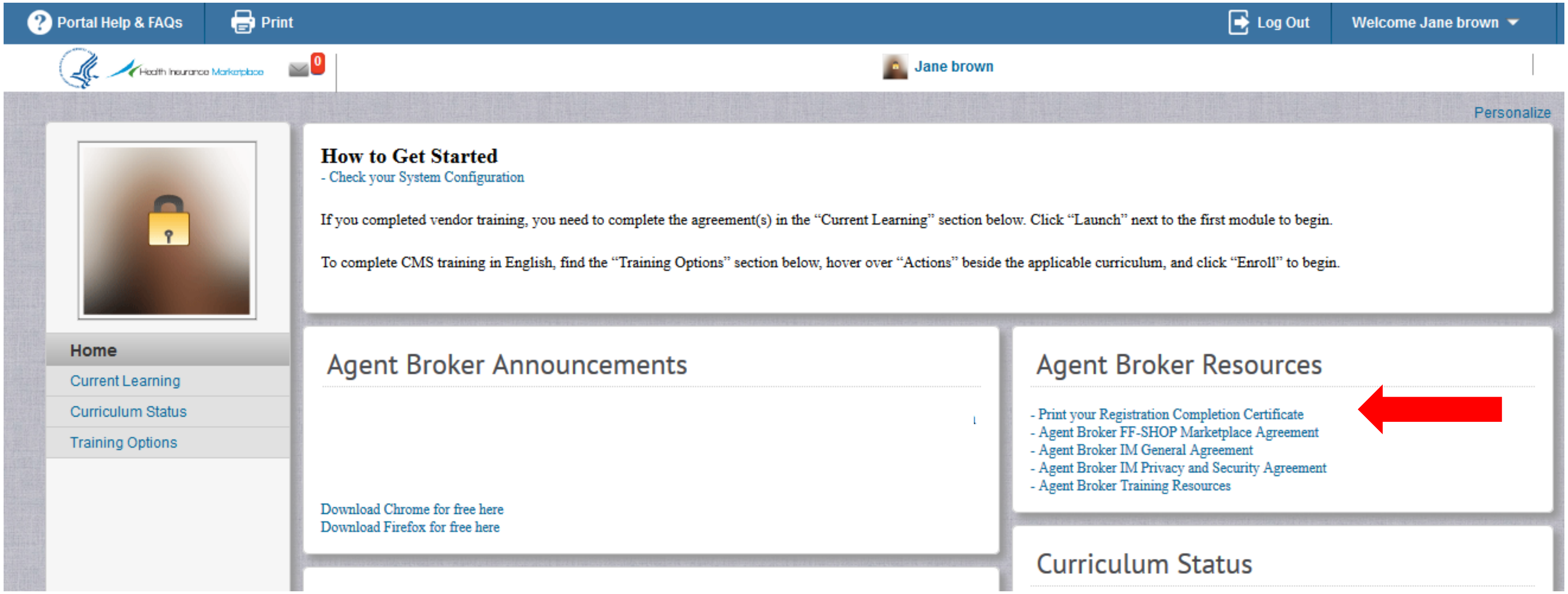


Step 7: Agent or Broker Confirms Completion on the Agent/Broker Registration Status Page (continued)

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

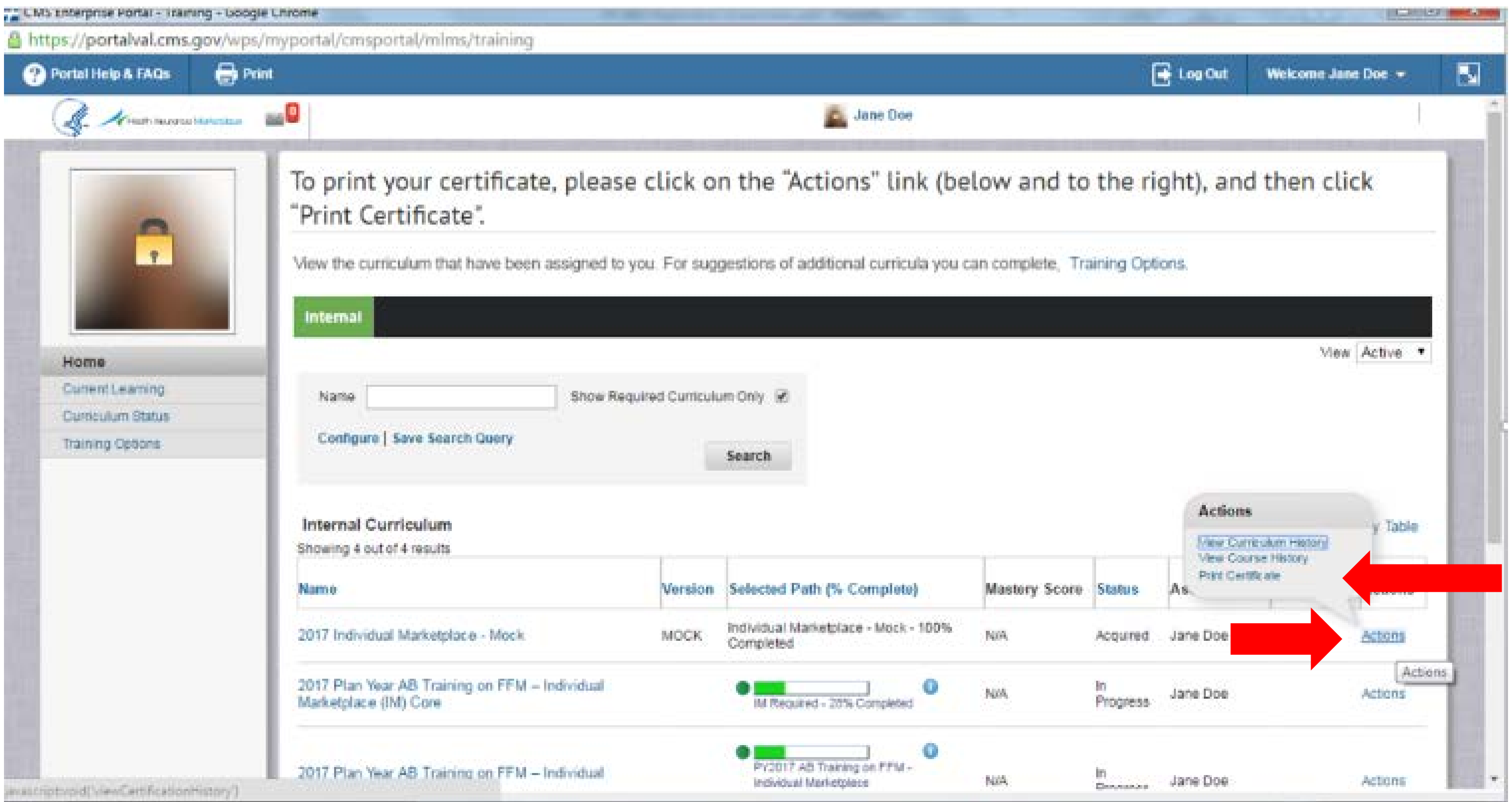
Step 7: Agent or Broker Confirms Completion on the Agent/Broker Registration Status Page (continued)

Select the "Print your Registration Completion Certificate" 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 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 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.*

Plan Year 2017 FFM Registration and Training for Agents and Brokers
New to the FFMs

Call Center and Help Desk Support

Call Center and Help Desk Support: Agent and Broker Call Center

- CMS maintains a Help Desk and Call Center specifically to assist agents and brokers in accessing the resources they need to support consumers.
- Email the **FFM Producer and Assister Help Desk** (FFMProducer-AssisterHelpDesk@cms.hhs.gov) for assistance with the following types of questions:
  - Agent/Broker FFM Registration Completion List issues
  - Identity proofing issues
  - "Find Local Help" issues
  - Eligibility and enrollment policy questions related to the Individual Marketplace
- Call the **Agent and Broker Call Center** at 1-855-CMS-1515 (855-267-1515) and select option "1" Monday through Saturday from 8:00 AM to 10:00 PM Eastern Time (ET) Agent and Broker Call Center (1-855-CMS-1515) for assistance with the following types of questions:
  - CMS Portal account issues, including error messages, password resets, and account lockouts
  - General registration and training questions, including SHOP Marketplace-related questions
  - Log in issues at the HealthCare.gov landing page

Call Center and Help Desk Support: Other Marketplace Call Centers

- For questions when working with consumers applying for and enrolling in coverage, call the **Health Insurance Marketplace Call Center** at 1-800-318-2596 (TTY: 1-855-889-4325), 7 days a week, 24 hours a day.
- For questions about the SHOP Marketplace, call the **SHOP Call Center** at 1-800-706-7893 (TTY: 711) Monday through Friday, 9:00 AM to 7:00 PM ET.

Call Center and Help Desk Support: Email Help Desk Support

- Have questions after hours or can wait for a response? Send your query via email.
  - For questions about the agent and broker registration process, and how agents and brokers can assist consumers in the FFMs, email the **FFM Producer and Assister Help Desk** at: FFMProducer-AssisterHelpDesk@cms.hhs.gov.
  - For technical or system-specific issues related to the MLMS, user-specific questions about maneuvering the learning management system site, or accessing CMS training and exams on the MLMS, contact the **MLMS Help Desk** at MLMSHelpDesk@cms.hhs.gov.
  - For questions about CMS Enterprise Portal password resets and account lockouts; HealthCare.gov website issues; and other CMS Enterprise Portal account issues, requests, or error messages, contact the **Exchange Operations Support Center** at 1-855-CMS-1515 (855)267-1515) or CMS_FEPS@cms.hhs.gov.
  - For questions/comments about web-broker participation in the FFMs: WebBroker@cms.hhs.gov.

Summary

The topics presented during this webinar included:

- SHOP Marketplace Overview
- Agent and Broker FFM Registration and Training Overview
- CMS-approved FFM Agent and Broker Vendor Training Option Overview
- Agent and Broker FFM Registration and Training Steps
- Call Center and Help Desk Support

Please note that the content in this presentation is limited to the Federally-facilitated Individual and SHOP Marketplaces (including FFMs where the states perform plan management functions), as well as SBMs that use Healthcare.gov for eligibility and enrollment.

Upcoming Activities

- Plan year 2017 Open Enrollment begins on November 1, 2016 and ends on January 31, 2017.
- The first date when plan year 2017 coverage can start is January 1, 2017.
- CMS will make the slides from this webinar available on REGTAP (https://www.regtap.info/) and the Resources for Agents and Brokers webpage (http://go.cms.gov/CCIIOAB).
- CMS will provide additional outreach through the remainder of 2016 on topics relevant to agents and brokers to help prepare for the 2017 Open Enrollment period, including webinars focusing on plan year 2017 system enhancements, eligibility and enrollment tips, and other key information.

Resources Available to Agents and Brokers

- CMS makes a wide variety of resources available online, including on the Agents and Brokers Resources webpage (http://go.cms.gov/CCIIOAB) which is the primary outlet for CMS information for agents and brokers.
- HealthCare.gov and Marketplace.CMS.gov also offer a wealth of information you can use to help consumers enroll in qualified health plans and manage their health care.
- CMS uses emails to provide agents and brokers up-to-the-minute information on time-sensitive issues, and on policy and process updates. You can establish an account at the CMS Enterprise Portal (https://portal.cms.gov/) to receive emails by selecting the “Get Email Updates” link in the right panel of the webpage.
- CMS publishes the “News for Agents and Brokers” newsletter on a monthly basis.
- CMS also releases current news and updates via its Twitter handles: @CMSGov and @HealthCareGov.

Agent and Broker Resources

- *If you would like to see which QHPs are available in the FFM in your state, you may view the QHP landscape file available at: https://www.healthcare.gov/health-and-dental-plan-datasets-for-researchers-and-issuers/.*
- *Agent and Broker NPNs can be found at: www.nipr.com/PacNpnSearch.htm.*
- *To access the SHOP Marketplace Agent/Broker Portal to complete a searchable profile and manage SHOP accounts, visit: https://healthcare.gov/marketplace/small-businesses/agent.*
- *For the regulations outlining the CMS-approved vendor training option, review 45 CFR 155.222.*
- *For the regulations outlining CMS' eight privacy principals, review 45 CFR 155.260(a).*
- *The "Find Local Help" tool can be accessed at: https://localhelp.healthcare.gov/.*

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
FTE	Full-time Equivalent
MLMS	Marketplace Learning Management System
MPR	Minimum Participation Rate
NPN	National Producer Number
PII	Personally Identifiable Information
Q&A	Question and Answer
QHP	Qualified Health Plan
SBM	State-based Marketplace
SBM-FP	State-based Marketplace on the federal platform
SHOP	Small Business Health Options Program

Questions?

For questions/comments about agent/broker participation in the FFM: FFMProducer-AssisterHelpDesk@cms.hhs.gov

For questions/comments on the MLMS: MLMSHelpDesk@CMS.HHS.gov

For questions/comments about the FFM application and enrollment:
1-800-318-2596 (TTY: 1-855-889-4325) available 7 days a week, 24 hours a day

For questions/comments about the FF-SHOP:
1-800-706-7893 (TTY: 711) available M-F 9:00 AM -7:00 PM ET

For questions/comments about web-broker participation in the FFM:
Webbroker@cms.hhs.gov