

# Plan Year 2017 Federally-facilitated Marketplace (FFM) Registration and Refresher Training for Agents and Brokers Returning to the FFM

## *An Overview for Agents and Brokers*

- *July 13, 2016*
- *July 19, 2016*
- *July 28, 2016*
- *August 3, 2016*
- *August 10, 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](http://Marketplace.CMS.gov) to learn more.*

# Webinar Agenda

- Small Business Health Options Program (SHOP) Marketplace Overview
- FFM Registration and Refresher 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 and 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 SBMs that use HealthCare.gov for eligibility and enrollment functions.*

# Plan Year 2017 Federally-facilitated Marketplace (FFM) Registration and Refresher Training for Agents and Brokers Returning to the FFM



## *SHOP Marketplace Overview*

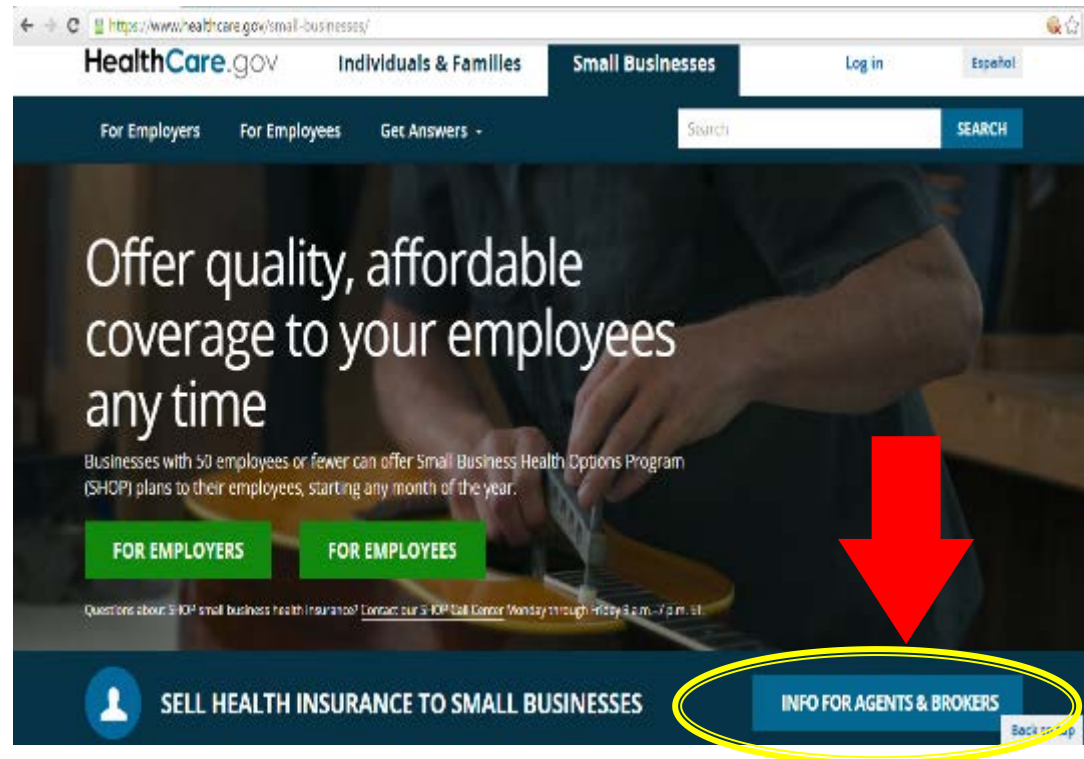
# SHOP Marketplace Registration

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 & Security Agreement in the 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.

# SHOP Marketplace Agent/Broker Portal

- The SHOP Marketplace Agent/Broker Portal can be accessed by visiting: [HealthCare.gov\small-businesses/](https://www.healthcare.gov/small-businesses/) and selecting the “Info for Agents and Brokers” 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 Marketplace.*

# 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/](http://www.HealthCare.gov/small-businesses/)
- Find SHOP Marketplace resources, fact sheets, and user guides at [Marketplace.CMS.gov](http://Marketplace.CMS.gov)
- Watch step-by-step SHOP Marketplace application and enrollment videos at [https://www.youtube.com/playlist?list=PLaV7m2-zFKphB8T\\_modG4ohUQeGLCa24c](https://www.youtube.com/playlist?list=PLaV7m2-zFKphB8T_modG4ohUQeGLCa24c)

# 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](http://www.linkedin.com/company/the-shop-marketplace-at-healthcare.gov?trk=prof-following-company-logo)
- Like us on Facebook: [www.facebook.com/Healthcare.gov](http://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 Federally-facilitated Marketplace (FFM) Registration and Refresher Training for Agents and Brokers Returning to the FFM



## *FFM Registration and Training Overview*

# 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 have previously participated in the FFMs already have a CMS Enterprise Portal account and should use their existing credentials to log in to the portal to access the MLMS.
- 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 participated in the FFMs during plan year 2016 already have an agent/broker profile on the MLMS and must complete the following actions:
  - Complete the assigned training courses and pass the exams through the MLMS via the CMS Enterprise Portal or through a CMS-approved vendor via the CMS Enterprise Portal\*
  - Read and accept the applicable Marketplace Agreement(s) on the MLMS
- Returning Individual Marketplace agents and brokers are eligible to take Refresher Training to complete the plan year 2017 Individual Marketplace training requirement and will be automatically enrolled into the Refresher Training.
  - Returning agents or brokers who wish to take additional curricula (i.e., SHOP Marketplace training or the full Individual Marketplace training, instead of the shorter Refresher Training) must enroll in the curriculum they wish to take.

*\* Training is only required for participation in the Individual Marketplace. Agents and brokers who participate in the SHOP Marketplace are encouraged, but not required, to take SHOP Marketplace training.*



# Registration and Training Overview (continued)

## Enhancements to FFM Agent and Broker Registration for Plan Year 2017

While most of the registration steps are the same as in plan year 2016, there are a few new features 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 three (3) training modules in the streamlined Refresher Training available for returning Individual Marketplace agents and brokers:
  - Basics Refresher Training
  - Individual Marketplace Refresher Training
  - Privacy and Security Refresher Training
- The Refresher Training also contains a Refresher Exam.
- Returning Individual Marketplace agents and brokers also have the option to take the entire training that is available to new agents and brokers.
- CMS will only be offering training in English for plan year 2017.

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

# Registration and Training Overview (continued)

## Enhancements to FFM Agent and Broker Training for Plan Year 2017

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

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 how they completed the plan year 2016 training.	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.

Returning agents and brokers who completed plan year 2016 FFM registration for the Individual Marketplace are eligible to take the streamlined Refresher Training for returning Individual Marketplace agents and brokers for plan year 2017 and will continue to be eligible each year they complete the Refresher Training.

# 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' personally identifiable information (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 List(s) 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.
- New for plan year 2017, the Registration Completion Certificate will include the date that the agent or broker completed registration.



# 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](http://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 Federally-facilitated Marketplace (FFM) Registration and Refresher Training for Agents and Brokers Returning to the FFM**



***FFM Agent and Broker  
CMS-approved Vendor  
Training Option***



# CMS-approved Vendor Training Option

- Agents and brokers who choose to complete training through a CMS-approved vendor must access the vendor's training via the MLMS and should not 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.

Note: Vendors' conformation codes are not required for plan year 2017 training.

# 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 (5) 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 Federally-facilitated Marketplace (FFM) Registration and Refresher Training for Agents and Brokers Returning to the FFM**



### ***FFM Agent and Broker Registration and Training Steps***

# Process for Registration and Training Completion

Returning agents and brokers must complete four (4) steps to become registered to participate in the FFMs for plan year 2017:

1. Log into CMS Enterprise Portal and update MLMS profile information
2. Complete training\*
3. Execute Agreement(s)
4. 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 updating their profile information.*

# Step 1: Log into CMS Enterprise Portal and Update MLMS Profile

Once at <https://portal.cms.gov>, select the “Login to CMS Secure Portal” button at <https://portal.cms.gov>.

The screenshot displays the CMS.gov Enterprise Portal interface. At the top, the CMS.gov logo is on the left, and navigation links (Home, About CMS, Newsroom, Archive, Help & FAQs, Email, Print) are on the right. Below the logo, it says "Centers for Medicare & Medicaid Services". A search bar is on the right with the text "Learn about your healthcare options" and "Search CMS.gov". Below this, there are two yellow buttons: "Health Care Quality Improvement System" and "Provider Resources". A breadcrumb trail shows "CMS Portal > Welcome to CMS Portal". The main content area features a large blue banner for "Welcome to PECOS Data Mart" with a text box describing the system. To the right of this banner, a red arrow points to a sidebar titled "CMS Secure Portal". This sidebar contains the text "To log into the CMS Portal a CMS user account is required." and a prominent blue button with a lock icon labeled "Login to CMS Secure Portal". Below this button are three links: "Forgot User ID?", "Forgot Password?", and "New User Registration".


# Step 1: Log into CMS Enterprise Portal and Update MLMS Profile (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.



# Step 1: Log into CMS Enterprise Portal and Update MLMS Profile (continued)

**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” on the Agents and Brokers Resources webpage.](#)

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

**CMS.gov** | Enterprise Portal  
Centers for Medicare & Medicaid Services

Health Care Quality Improvement System    Provider Resources

Welcome to CMS Enterprise Portal

User ID

Password

[Forgot Password?](#)  
[Forgot User ID?](#)  
Need an account? Click the link - [New user registration](#)



# Step 1: Log into CMS Enterprise Portal and Update MLMS Profile (continued)


- After logging into the CMS Enterprise Portal, 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
<a href="#">2.Complete Agent Broker Training:</a> 	Incomplete
• Individual Market	
• SHOP	
3.Print Certificate(s)	Accessible after completing steps 1 & 2.

# Step 1: Log into CMS Enterprise Portal and Update MLMS Profile (continued)

After logging into your CMS Enterprise Portal account, 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 update your MLMS profile prior to completing training.
- For either training, you will need to execute the Agreement(s) after you have completed training.

## 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)      [Return to Training](#)      [MLMSHelpDesk@cms.hhs.gov](mailto:MLMSHelpDesk@cms.hhs.gov)

[Return to Agent Broker Registration Status Page](#)

\*Additional details about the CMS-approved vendor training will be reviewed during step 2b.

# Step 1: Log into CMS Enterprise Portal and Update 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)  [Return to Training](#) [MLMSHelpDesk@cms.hhs.gov](mailto:MLMSHelpDesk@cms.hhs.gov)

[Return to Agent Broker Registration Status Page](#)

# Step 1: Log into CMS Enterprise Portal and Update MLMS Profile (continued)

To update your profile, select the “Return to Training” link next to the Marketplace Learning Management System (CMS) option. You will need to select this link to update your MLMS profile, even if you are accessing training through one of the CMS-approved vendor links.

## 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)            [Return to Training](#)      [MLMSHelpDesk@cms.hhs.gov](mailto:MLMSHelpDesk@cms.hhs.gov)

[Return to Agent Broker Registration Status Page](#)

# Step 1: Log into CMS Enterprise Portal and Update MLMS Profile (continued)

Once the MLMS profile page appears in a separate window, review your profile information to confirm it is still accurate.

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

Portal Help & FAQs Print Log Out

Please fill out the following profile fields with your business/professional contact information. This information is required for CMS to maintain an accurate agent/broker registration completion list.

Are you a SHOP Agent/Broker?

- ☐ Yes  
☒ No

After you complete all CMS agent/broker registration requirements, your professional contact information will be displayed on HealthCare.gov's "Find Local Help" features. Find Local Help is a tool accessible on HealthCare.gov to enable consumers, small businesses, and small business employees to identify a local registered agent or broker to assist them with the Federally-facilitated Marketplace, including the SHOP Marketplace.

Find Local Help Option

Please select your preference regarding the display of your contact information on Find Local Help. \*

-Select One-



Business Profile

Business Street Address \*

Business City \*

Business State \*


-Select One-

# Step 1: Log into CMS Enterprise Portal and Update MLMS Profile (continued)

- If you also act as the authorized representative for a web-broker or other business entity and you entered your business entity's NPN into your MLMS profile for plan year 2016, it will still be associated with your MLMS profile.
- If you have recently become the authorized representative for a web-broker or other business entity and wish to add the NPN to your MLMS profile for plan year 2017, 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.


## Business Entity Profile

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If you are the authorized individual  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

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If you are the authorized individual  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 1: Log into CMS Enterprise Portal and Update MLMS Profile (continued)

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).

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

Business Entity Name *	<input type="text"/>
Business Entity Street Address *	<input type="text"/>
Business Entity City *	<input type="text"/>
Business Entity State *	<input type="text" value="-Select One-"/>
Business Entity Zip Code *	<input type="text"/>
Business Entity Phone *	<input type="text"/>
Business Entity Email *	<input type="text"/>
Business Entity URL	<input type="text"/>
Business Entity National Producer Number (NPN) (1-10 numeric characters not starting with zero) *	<input type="text"/>
Confirm NPN *	<input type="text"/>
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.) *	<input type="text" value="-Select One-"/>
	<input type="text" value="-Select One-"/>
	<input type="text" value="-Select One-"/>
	<input type="text" value="-Select One-"/>
	<input type="text" value="-Select One-"/>



# Step 1: Log into CMS Enterprise Portal and Update MLMS Profile (continued)

- 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 (3) NPNs in one profile.

# Step 1: Log into CMS Enterprise Portal and Update MLMS Profile (continued)

Once you have entered all your profile information, select the “Save/Update” button.

## Business Entity Profile

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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

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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).

To save your profile information, please click “Save” below.



Save/Update

To proceed without updating your profile information, please click “Next” below.

Next

# Step 1: Log into CMS Enterprise Portal and Update MLMS Profile (continued)

After selecting the “Save/Update” button, you will be taken to the MLMS Landing page.

The screenshot displays the MLMS Landing page. At the top, a blue header bar contains a 'Log Out' button and a welcome message 'Welcome hpimplSatz SatzMuruABC'. Below the header, a navigation sidebar on the left lists 'Home', 'Current Learning', 'Curriculum Status', and 'Training Options'. The main content area is divided into several sections:

- How to Get Started**: Includes instructions on completing vendor training and finding the 'Training Options' section.
- Agent Broker Announcements**: Features an important notice about using Chrome or Firefox for training and links to download these browsers.
- Agent Broker Resources**: Lists links for registration completion certificates, marketplace agreements, and training resources.
- Current Learning**: A table showing the status of various training modules.
- Curriculum Status**: A table showing the status of the 2017 Plan Year AB Training on FFM - Individual Marketplace (IM) Refresher.

Name	Status	Action
001 PY2017 Welcome Location: Online	In-Progress	Launch
013 Individual Marketplace Privacy and Security Agreement - IM Refresher Location: Online	In-Progress	View Details
014 Individual Marketplace General Agreement - IM Refresher Location: Online	In-Progress	View Details
019 PY2017 Basics Refresher Location: Online	In-Progress	Launch
020 PY2017 Individual Marketplace Refresher Location: Online	In-Progress	Launch
021 PY2017 Privacy and Security Refresher Location: Online	In-Progress	Launch

Name	Version	Status	Target Date	Recertification?
2017 Plan Year AB Training on FFM - Individual Marketplace (IM) Refresher		Assigned		No

[All Curriculum](#)

# Step 2: 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 (2) 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 2a, and will then discuss the process for completing training via a CMS-approved vendor in Step 2b.

# Step 2a: Agent or Broker Completes MLMS Training

- After updating your MLMS Profile, you will be redirected to the “MLMS Landing Page” on the MLMS.
- As a returning agent or broker, you will be automatically enrolled into the Individual Marketplace Refresher Training curriculum, which will be listed under “Current Learning.”

The screenshot shows the CMS Enterprise Portal interface. The user is logged in as 'hplmplSatz SatzMuraABC'. The page displays the 'How to Get Started' section, 'Agent Broker Announcements', 'Agent Broker Resources', and 'Current Learning'.

**Current Learning**

Name	Status	Action
001 PY2017 Welcome Location: Online	In-Progress	Launch
013 Individual Marketplace Privacy and Security Agreement - IM Refresher Location: Online	In-Progress	View Details
014 Individual Marketplace General Agreement - IM Refresher Location: Online	In-Progress	View Details
019 PY2017 Basics Refresher Location: Online	In-Progress	Launch
020 PY2017 Individual Marketplace Refresher Location: Online	In-Progress	Launch
021 PY2017 Privacy and Security Refresher Location: Online	In-Progress	Launch

**Curriculum Status**

Name	Version	Status	Target Date	Recertification?
2017 Plan Year AB Training on FFM - Individual Marketplace (IM) Refresher		Assigned		No

*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 2b.*

# Step 2a: Agent or Broker Completes MLMS Training

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

The top screenshot shows the MLMS training portal with the following sections:

- How to Get Started**
  - Check your System Configuration
  - If you completed vendor training, you need to complete the agreement(s) in the “Current Learning” section below. Click “Launch” next to the first module to begin.
  - To complete CMS training in English, find the “Training Options” section below; hover over “Actions” beside the applicable curriculum, and click “Enroll” to begin.
- Agent Broker Announcements**
  - Important: Please use either Chrome or Firefox to complete training. The system is producing errors > resolve this issue.
  - Download Chrome for the Download Firefox for free
- Agent Broker Resources**
  - Print your Registration Completion Certificate
- Current Learning**
  - No items found.

The bottom screenshot shows the **Training Options** table:

Recommendation	Recommendation Type	Sources	Recommended On	Actions
2017 Plan Year AB Training on FFM - Small Business Health Options Program (SHOP) Core	Curriculum	(1) AgentBroker	07/06/2016	Actions

A red arrow points from the 'Actions' link in the table to the right.

*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 2b.*

# Step 2a: Agent or Broker Completes MLMS Training (continued)

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

The screenshot displays the 'Training Options' section of the MLMS interface. It features a table with five rows of training recommendations. Each row includes columns for the recommendation name, type, sources, and recommended date. An 'Actions' bubble is overlaid on the right side of the table, containing links for 'View Detail' and 'Enroll'. A red arrow points to the 'Enroll' link.

Recommendation	Recommendation Type	Sources	Recommended On	Actions
2017 Individual Marketplace - Mock	Curriculum	(1)AgentBroker	06/23/2016	<a href="#">View Detail</a> <a href="#">Enroll</a>
2017 SHOP Marketplace - Mock	Curriculum	(1)AgentBroker	06/23/2016	<a href="#">View Detail</a> <a href="#">Enroll</a>
Individual Marketplace - Mock - 2016	Curriculum	(1)AgentBroker	06/23/2016	<a href="#">View Detail</a> <a href="#">Enroll</a>
AB_Updates_December2015	Curriculum	(1)AgentBroker	06/23/2016	<a href="#">View Detail</a> <a href="#">Enroll</a>
2017 Plan Year AB Training on FFM – Individual Marketplace (IM) Core	Curriculum	(1)AgentBroker	06/23/2016	<a href="#">View Detail</a> <a href="#">Enroll</a>

[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 2b.*



# Step 2a: 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.

The screenshot shows a web application interface for the MLMS training. At the top, there is a blue header bar with links for 'Portal Help & FAQs', 'Print', 'Log Out', and a welcome message 'Welcome Jane Doe'. Below the header, a sidebar on the left contains a 'Home' button and a list of links: 'Current Learning', 'Curriculum Status', and 'Training Options'. The main content area is titled 'Register for 2017 Individual Marketplace - Mock'. It features a blue ribbon icon, a text instruction to verify the path and select modules, and a red arrow pointing to a 'Complete Enrollment' button. Below this, there is a section for 'Individual Marketplace - Mock' (Complete 1 of 1 Required) with a 'Required' status. A list of modules is shown, including 'MockInd1' (Course: 00001120) with a checkbox. Below the module list, there is a section for 'Offering ID: 00001180' and 'Language: English', with 'Offered As: Web Based Training' and a 'Suggested' status. At the bottom right, there are 'Complete Enrollment' and 'Cancel' buttons.

*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 2b.*



# Step 2a: Agent or Broker Completes MLMS Training (continued)

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

The screenshot displays the MLMS Registration Confirmation page for Jane Doe. The page includes a navigation sidebar on the left with links for Home, Current Learning, Curriculum Status, and Training Options. The main content area shows the Registration Confirmation details, including Order Contact (Jane Doe), Billed To (AgentBroker), Order Status (Confirmed), and Order Number (00008800). Below this is a table of Order Items with columns for Title, Learners, Delivery Type, Status, and Actions. The table lists one item: 2017 Individual Marketplace - Mock, Jane Doe, Web Based Training, Confirmed, and a link to Notes. At the bottom of the page, there are two buttons: 'Go to Curriculum Details' and 'Go to Current Learning'. A red arrow points to the 'Go to Current Learning' button.

Portal Help & FAQs Print Log Out Welcome Jane Doe

Health Insurance Marketplace

Jane Doe

## Registration Confirmation

[Printer Friendly Version](#)

Order Contact: Jane Doe  
Billed To: AgentBroker  
Order Status: Confirmed  
Order Number: 00008800

### Order Items

Title	Learners	Delivery Type	Status	Actions
2017 Individual Marketplace - Mock	Jane Doe			
MockInd1		Web Based Training	Confirmed	<a href="#">Notes</a>

[Go to Curriculum Details](#) [Go to Current Learning](#)

*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 2b.*

# Step 2a: Agent or Broker Completes MLMS Training (continued)

You may start a 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.




Portal Help & FAQs | Print | Log Out | Welcome Jane Doe

Health Insurance Marketplace | Jane Doe

### Current Learning


All | Courses | Curriculum |

Sort By: Alphabetical | Go

Name	Status	Actions
 <b>2017 Individual Marketplace - Mock (MOCK)</b> Assigned By: Jane Doe (Assigned On: 06/23/2016)	 <input type="text" value="0% Completed"/>	<a href="#">View Details</a>   <a href="#">View Progress for All Paths</a>   <a href="#">View Curriculum History</a>
 <b>MockInd1 (00001180)</b> Duration: 00:00 hours	Confirmed Registration Date: 06/23/2016	<a href="#">View Details</a>   <a href="#">Drop</a>   <a href="#">Drop and Request Learning</a>

[Hide Learning Assignments](#)

Training Content: [001 Welcome](#)  
Status: Not Evaluated (Unlimited attempts)

[Launch](#) 

*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 2b.*

# Step 2b: 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 updating your MLMS profile (i.e., complete step 2b before step 1).

## 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)

[Return to Training](#)

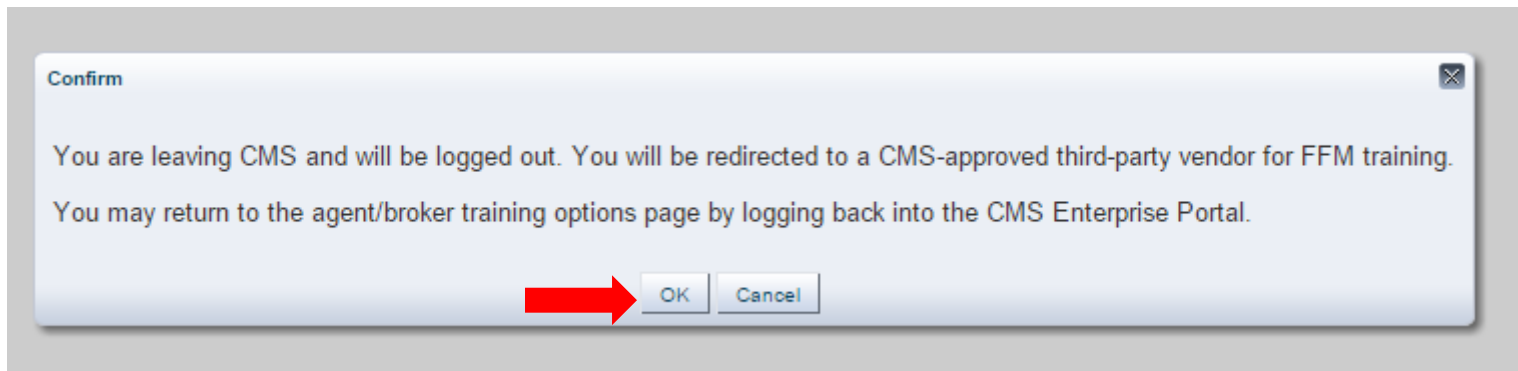
[MLMSHelpDesk@cms.hhs.gov](mailto:MLMSHelpDesk@cms.hhs.gov)

[Return to Agent Broker Registration Status Page](#)

*These screenshots only apply to the CMS-approved vendor training. If you want to complete the MLMS training, reference step 2a.*

## Step 2b: 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 only apply to the CMS-approved vendor training. If you want to complete the MLMS training, reference step 2a.*

## Step 2b: Agent or Broker Completes CMS-approved Vendor Training (continued)

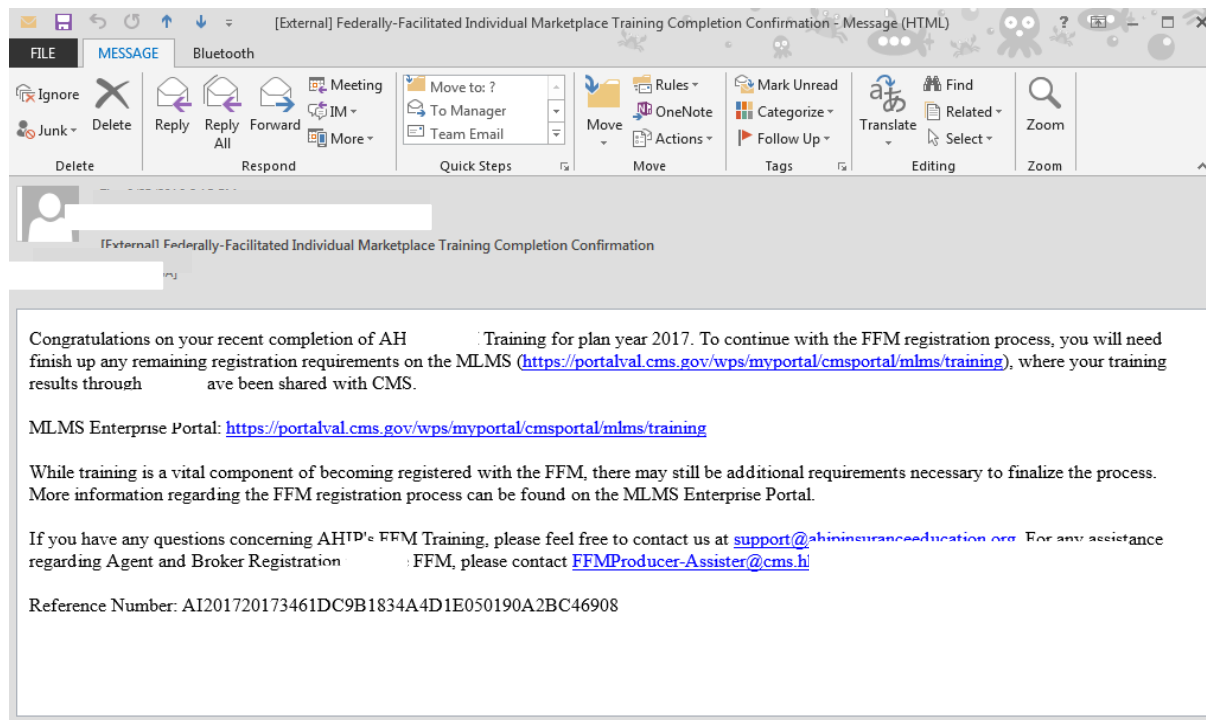
- Once you have completed the training through a CMS-approved vendor, you will be directed to log back in to the CMS Enterprise Portal to complete registration, including updating your MLMS profile (step 1) and signing the Agreement(s) (step 3).



*These screenshots only apply to the CMS-approved vendor training. If you want to complete the MLMS training, reference step 2a.*

# Step 2b: 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.



*These screenshots only apply to the CMS-approved vendor training. If you want to complete the MLMS training, reference step 2a.*

# Step 3: Agent or Broker Executes the Agreement(s) with CMS



- You must update your profile information and completed the required training and exams before you can sign the Agreement(s).
- You must complete all other registration and training requirements 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 3: 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 “Yes” button at the end of the Agreement to confirm you have reviewed and accept the terms of the Marketplace Agreement.

Individual Marketplace General Agreement Exit

Agent Broker General Agreement for FFM Individual Market 8 of 8

**Accept Agreement**

**Do you accept the terms and conditions of the AGENT BROKER GENERAL AGREEMENT FOR THE FEDERALLY-FACILITATED EXCHANGE INDIVIDUAL MARKET?**

Select "I Agree" to provide your electronic signature.

Select your response and click Submit.

☐ I Agree

☐ I Do Not Agree



# Step 4: Confirm 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 for the system to complete updating your records. 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.

[Portal Help & FAQs](#) [Print](#) [Log Out](#) [Welcome Jane Doe](#)

en reader mode Off | Accessibility Settings

### My Access

[Request New System Access](#)  
[View and Manage My Access](#)

### 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.

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

0%

100%

We are in the process of updating your records and granting you the Agent Broker Role. Please stay on this page until this process is complete. This page will automatically refresh in 58.0 seconds.

# Step 4: Confirm 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.

[Portal Help & FAQs](#) [Print](#) [Log Out](#) Welcome Jane Doe ▾

Screen reader mode Off | Accessibility Settings

## My Access

- [Request New System Access](#)
- [View and Manage My Access](#)

### 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.

FFM - Agents and Brokers Role	Status
<a href="#">1.Complete Identity Proofing</a>	Complete
<a href="#">2.Complete Agent Broker Training:</a>	Complete
• Individual Market	Complete
• SHOP	
<a href="#">3.Print Certificate(s)</a>	

0%100%

We are in the process of updating your records and granting you the Agent Broker Role. Please stay on this page until this process is complete. This page will automatically refresh in 58.0 seconds.



# Step 4: Confirm Completion on the Agent Broker Registration Status Page (continued)

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

The screenshot displays the MLMS interface. At the top, a blue navigation bar contains links for 'Portal Help & FAQs', 'Print', 'Log Out', and a welcome message 'Welcome Jane brown'. Below this, a header area shows the 'Health Insurance Marketplace' logo and the user's name 'Jane brown'. The main content area is divided into several sections:

- How to Get Started**: Includes instructions on completing vendor training and CMS training.
- Agent Broker Announcements**: Features an important notice about browser compatibility (Chrome or Firefox) and links to download these browsers.
- Agent Broker Resources**: A list of resources including 'Print your Registration Completion Certificate', 'Agent Broker FF-SHOP Marketplace Agreement', 'Agent Broker IM General Agreement', 'Agent Broker IM Privacy and Security Agreement', and 'Agent Broker Training Resources'. A red arrow points to the first item.
- Curriculum Status**: A section for tracking training progress.

A sidebar on the left contains a 'Home' button and links to 'Current Learning', 'Curriculum Status', and 'Training Options'.

# Step 4: Confirm Completion on the Agent Broker Registration Status Page (continued)

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

The screenshot shows the CMS Enterprise Portal training interface. The top navigation bar includes links for Portal Help & FAQs, Print, Log Out, and a welcome message for Jane Doe. The main content area displays a message about printing certificates and a search filter for 'Internal' curriculum. Below this is a table of curriculum items with columns for Name, Version, Selected Path (% Complete), Mastery Score, Status, and Actions. The first row shows '2017 Individual Marketplace - Mock' with a mastery score of N/A and status of Acquired. The second row shows '2017 Plan Year AB Training on FFM - Individual Marketplace (IM) Core' with a mastery score of N/A and status of In Progress. The third row shows '2017 Plan Year AB Training on FFM - Individual Marketplace' with a mastery score of N/A and status of In Progress. An 'Actions' bubble is overlaid on the table, containing links for 'New Curriculum History', 'View Course History', and 'Print Certificate'. A red arrow points to the 'Print Certificate' link, and another red arrow points to the 'Actions' link in the table row for the first curriculum item.

To print your certificate, please click on the “Actions” link (below and to the right), and then click “Print Certificate”.

View the curriculum that have been assigned to you. For suggestions of additional curricula you can complete, Training Options.

Internal [Search Bar] View Active

Name [Search Bar] Show Required Curriculum Only ☒ Configure | Save Search Query Search

Internal Curriculum  
Showing 4 out of 4 results

Name	Version	Selected Path (% Complete)	Mastery Score	Status	As	Actions
2017 Individual Marketplace - Mock	MOCK	Individual Marketplace - Mock - 100% Completed	N/A	Acquired	Jane Doe	Actions
2017 Plan Year AB Training on FFM - Individual Marketplace (IM) Core		IM Required - 20% Completed	N/A	In Progress	Jane Doe	Actions
2017 Plan Year AB Training on FFM - Individual Marketplace		IM Required - 20% Completed	N/A	In Progress	Jane Doe	Actions

Actions bubble: New Curriculum History, View Course History, Print Certificate

# Step 4: Confirm Completion on the Agent Broker Registration Status Page (continued)

Your Registration Completion Certificate will include:

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



*The issuer(s) with which an agent or broker is affiliated may request to view his or her Registration Completion Certificate(s). However, issuers are instructed to review the Registration Completion list published by CMS and available on the Agents and Brokers Resources webpage at <http://go.cms.gov/CCIIOAB> to confirm the registration status of agents and brokers.* 57

## **Plan Year 2017 Federally-facilitated Marketplace (FFM) Registration and Refresher Training for Agents and Brokers Returning to the FFM**

*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](mailto: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 and enrolling, 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](mailto: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](mailto: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](mailto:CMS_FEPS@cms.hhs.gov).
- For questions/comments about web-broker participation in the FFMs: [WebBroker@cms.hhs.gov](mailto: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](http://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 FFMs:  
[FFMProducer-AssisterHelpDesk@cms.hhs.gov](mailto:FFMProducer-AssisterHelpDesk@cms.hhs.gov)

For questions/comments on the MLMS: [MLMSHelpDesk@CMS.HHS.gov](mailto:MLMSHelpDesk@CMS.HHS.gov)

For questions/comments about 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 Monday-Friday 9:00 AM - 7:00 PM ET

For questions/comments about web-broker participation in the FFMs:  
[Webbroker@cms.hhs.gov](mailto:Webbroker@cms.hhs.gov)