

# Plan Year 2021 Health Insurance Marketplace<sup>®</sup> Registration and Training for New Agents and Brokers

*August 2020*

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



1 / 10 | Exit >

Welcome to the  
**INTRODUCTION TO  
MARKETPLACE AGENT  
AND BROKER TRAINING**



 Health Insurance Marketplace

# Disclaimer

*The information provided in this presentation is intended only as a general, informal summary of technical legal standards. It is not intended to take the place of the statutes, regulations, and formal policy guidance that it is based upon. 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 document generally is not intended for use in the State-based Marketplaces that do not use HealthCare.gov for eligibility and enrollment. 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.*

*Unless indicated otherwise, the general references to “Marketplace” in the presentation only includes Federally-facilitated Marketplaces (FFMs) and State-based Marketplaces on the Federal Platform.*

*This communication was printed, published, or produced and disseminated at U.S. taxpayer expense.*

# Intended Audience

The intended audience for this presentation includes 1) agents and brokers joining the Marketplace for the first time for plan year 2021 and 2) agents and brokers who participated in a previous plan year, but did NOT complete plan year 2020 Marketplace registration and training.

- “Returning” agents and brokers who successfully completed registration and training for plan year 2020 are eligible for “What's New for Returning Agents and Brokers” training for plan year 2021. They are required to execute the applicable Marketplace Agreements.
- “New” agents and brokers who did not complete registration and training for plan year 2020 are required to complete the full Individual Marketplace training for plan year 2021 if assisting with Individual Marketplace enrollments. They are required to execute the applicable Marketplace Agreements.

# Agenda

- Introduction
- Marketplace Registration and Training Process
- Help Desk and Call Center Support
- Agent and Broker Resources

# Introduction to Agents and Brokers for Plan Year 2021!

*Thank you for your interest in the Marketplace for plan year 2021!\**

- To the extent permitted by states, licensed agents and brokers assist consumers in applying for insurance affordability programs, including the premium tax credit and cost-sharing reductions, and enrolling in qualified health plans (QHPs) through the Marketplace.
- Agents and brokers also play a crucial role in educating consumers about the Health Insurance Marketplace®, both during the annual Open Enrollment period and throughout the plan year.



*\* 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.*

# Introduction to Agents and Brokers for Plan Year 2021! (Continued)

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 Marketplace.
- 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 to a consumer.



To better understand the standards under 45 CFR §§ 155.220 and 155.260, review the guidance on the Centers for Medicare & Medicaid Services (CMS) [Agents and Brokers Resources webpage](#).



# Plan Year 2021 Health Insurance Marketplace<sup>®</sup> Registration and Training for New Agents and Brokers

CMS.gov | My Enterprise Portal ☰ My

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### My Access

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

## Plan Year 2021 Agent Broker Registration Status

Please click the link below next to items marked 'INCOMPLETE' to register as an agent/broker for the 2018 plan year. A 'Complete' status should display at the bottom of the page. If your status is not accurate, please log out and log back in to complete your 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 for 16.0 seconds.

## *Marketplace Registration and Training Process*

# Registration and Training for New Agents and Brokers

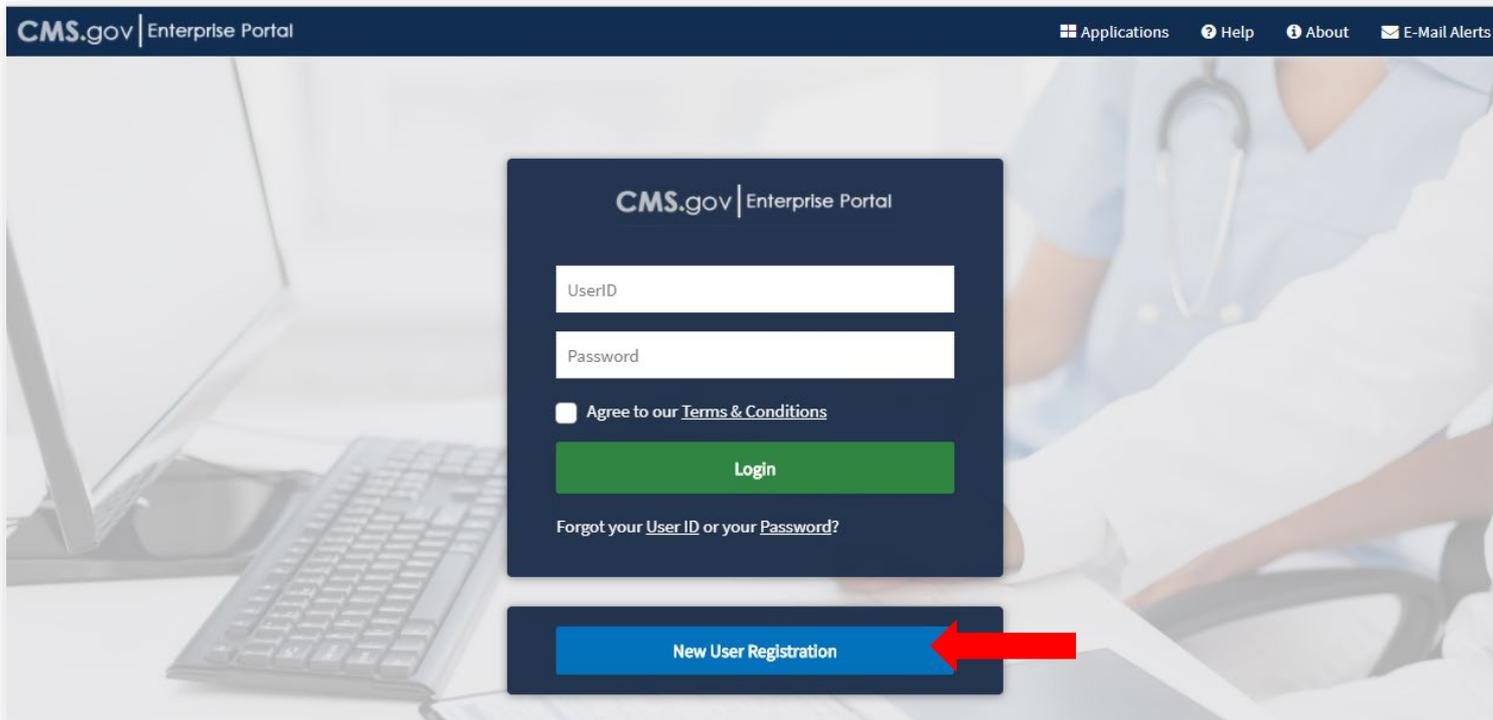
If you wish to participate in the Marketplace for plan year 2021, you must complete the following actions:

1. Create a CMS Enterprise Portal account.
2. Request the FFM Agent Broker role.
3. Complete remote identity proofing through the Enterprise Identity Management (EIDM) System.
4. Complete your agent/broker profile on the Marketplace Learning Management System (MLMS) via the CMS Enterprise Portal.
5. Complete Marketplace training on the MLMS or through an HHS-approved vendor via the CMS Enterprise Portal.
6. Read and accept the applicable Marketplace Agreement(s) on the MLMS.
7. Confirm completion of all registration steps by logging back in to the “Agent Broker Registration Status” page on the CMS Enterprise Portal and printing your completion certificate.

*For a printable tip sheet with information on these steps, please see the [New Agents' and Brokers' Guide to Plan Year 2021 Marketplace Registration and Training](#) resource on the [Agents and Brokers Resources Plan Year 2021 Registration and Training](#) webpage.*

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

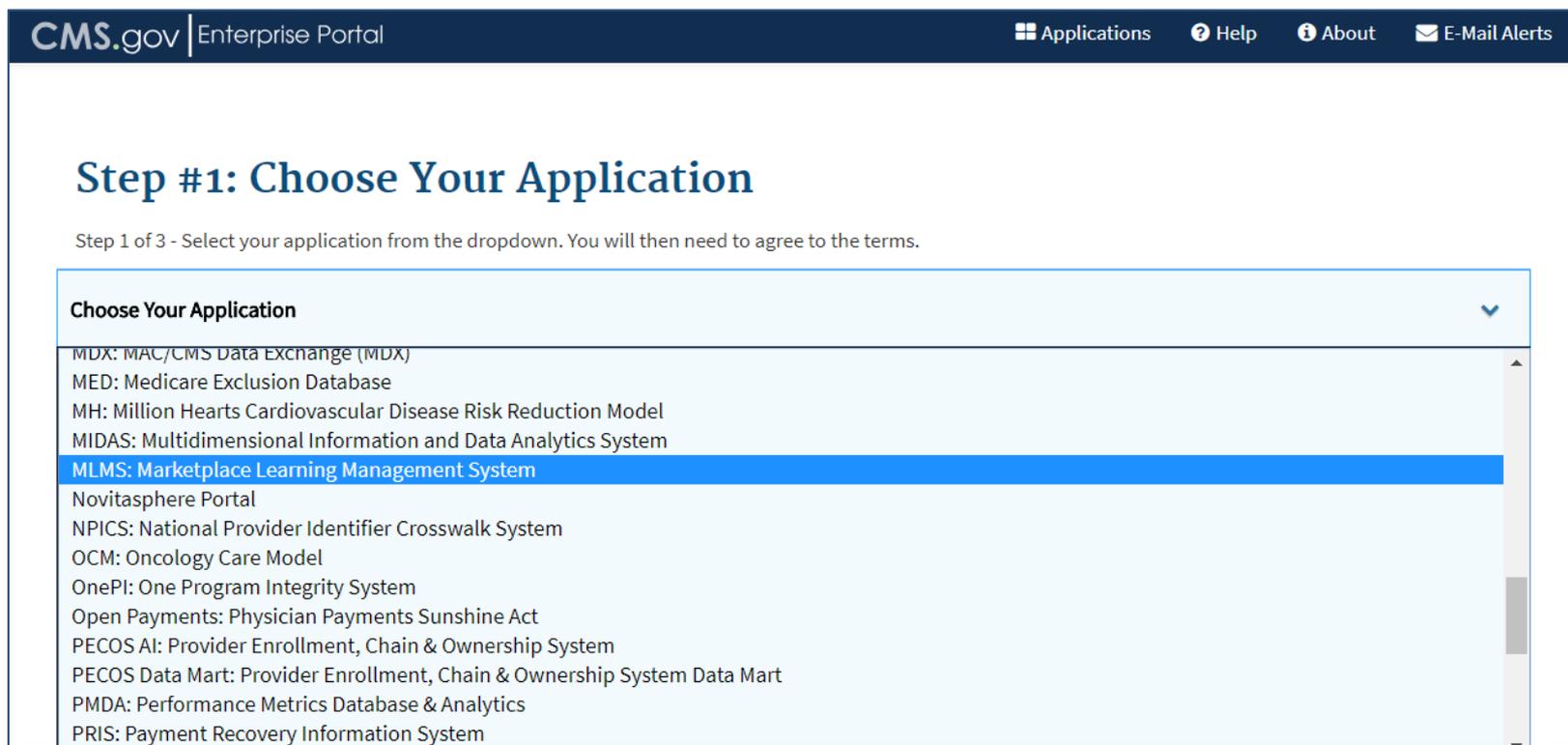
If you do not already have a CMS Enterprise Portal account,\* navigate to <https://portal.cms.gov> and select the “New User Registration” button.



*\*If you already have a CMS Enterprise Portal account, you should **not** create a new one. You should log in with your existing FFM User ID and password and proceed to Step 2. If you are unsure if you already have an FFM User ID and password, see the [“Avoiding the Creation of a Duplicate CMS Enterprise Portal Account”](#) resource on the Agents and Brokers Resources webpage.*

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

Select the Marketplace Learning Management System (MLMS) application from the dropdown list.



The screenshot displays the CMS.gov Enterprise Portal interface. At the top, the header includes the CMS.gov logo, 'Enterprise Portal', and navigation links for 'Applications', 'Help', 'About', and 'E-Mail Alerts'. The main content area features a heading 'Step #1: Choose Your Application' and a sub-heading 'Step 1 of 3 - Select your application from the dropdown. You will then need to agree to the terms.' Below this is a dropdown menu titled 'Choose Your Application' with a downward arrow. The dropdown list contains the following items:

- MDX: MAC/CMS Data Exchange (MDX)
- MED: Medicare Exclusion Database
- MH: Million Hearts Cardiovascular Disease Risk Reduction Model
- MIDAS: Multidimensional Information and Data Analytics System
- MLMS: Marketplace Learning Management System**
- Novitasphere Portal
- NPICS: National Provider Identifier Crosswalk System
- OCM: Oncology Care Model
- OnePI: One Program Integrity System
- Open Payments: Physician Payments Sunshine Act
- PECOS AI: Provider Enrollment, Chain & Ownership System
- PECOS Data Mart: Provider Enrollment, Chain & Ownership System Data Mart
- PMDA: Performance Metrics Database & Analytics
- PRIS: Payment Recovery Information System

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

After reading and agreeing to the Terms & Conditions, select the check box next to “I Agree to the terms and conditions” and then select “Next.”

CMS.gov | Enterprise Portal

Applications Help About E-Mail Alerts

## Step #1: Choose Your Application

Step 1 of 3 - Select your application from the dropdown. You will then need to agree to the terms.

MLMS: Marketplace Learning Management System

### Terms & Conditions

OMB No.0938-1236 | Expiration Date: 03/31/2021 | Paperwork Reduction Act

#### Consent to Monitoring

By logging onto this website, you consent to be monitored. Unauthorized attempts to upload information and/or change information on this web site are strictly prohibited and are subject to prosecution under the Computer Fraud and Abuse Act of 1986 and Title 18 U.S.C. Sec.1001 and 1030. We encourage you to read the HHS Rules of Behavior.

I agree to the terms and conditions

**Next** Cancel

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

Enter the requested information and select “Next.”

The screenshot shows a registration form titled "Step #2: Register Your Information" within a web application interface. The form is part of a three-step process, with the current step being "Step 2 of 3 - Please enter your personal and contact information." A note states, "All fields are required unless marked 'Optional'." The form includes several input fields and dropdown menus for personal and contact information. At the bottom, there are three buttons: "Back", "Next", and "Cancel".

Applications

## Step #2: Register Your Information

Step 2 of 3 - Please enter your personal and contact information.  
All fields are required unless marked 'Optional'.

Enter First Name    Enter Middle Name (optional)    Enter Last Name    Suffix (optional) ▼

Enter Social Security Number (optional)    Birth Month ▼    Birth Date ▼    Birth Year ▼

Is Your Address US Based?  
 Yes     No

Enter Home Address #1    Enter Home Address #2 (optional)

Enter City    State ▼    Enter Zip Code    Enter Zip+4 (optional)

Enter E-mail Address    Confirm E-mail Address

Enter Phone Number

Back    Next    Cancel

# 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 “Next.”

The screenshot shows the 'Enterprise Portal' interface. At the top, there are navigation links for 'Applications', 'Help', and 'About'. The main heading is 'Step #3: Create User ID, Password & Challenge Questions'. Below this, a sub-heading reads 'Step 3 of 3 - Please create User ID and Password, Select Challenge questions and provide answers.' The form contains several input fields: 'Enter User ID', 'Enter Password' (with a visibility icon), 'Enter Confirm Password' (with a visibility icon), three dropdown menus for 'Select Challenge Question #1', '#2', and '#3', and three corresponding text boxes for 'Enter Challenge Question #1 Answer', '#2 Answer', and '#3 Answer'. At the bottom, there are two buttons: 'Back' and 'Next'. A large red arrow points to the 'Next' button.

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

Review the information you entered, make any necessary changes, and then select “Submit User.”

Enterprise Portal Applications Help About

## Registration Summary

Please review your information and make any necessary changes before submitting.

MLMS: Marketplace Learning Management System

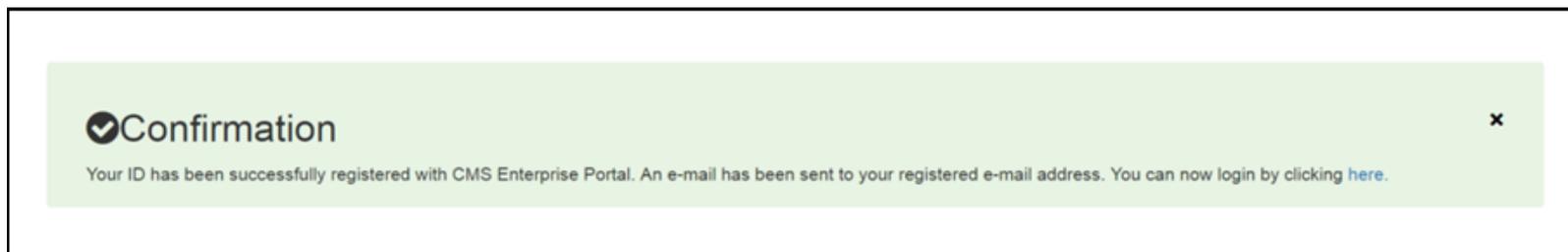
All fields are required unless marked 'Optional':

First Name FirstName	Enter Middle Name (optional)	Last Name LastName	Suffix (optional)
Enter Social Security Number (optional)	Birth Month January	Birth Date 1	Birth Year 1999
Home Address #1 100 Main Street	Enter Home Address #2 (optional)		
City CityName	State Maryland	Zip Code 10000	Enter Zip+4 (optional)
E-mail Address FirstNameLastName@email.com	Confirm E-mail Address FirstNameLastName@email.com		
What is the name of your favorite childhood friend?	Challenge Question #3 Answer friend		

**Submit User** 

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

- The Confirmation page is displayed to acknowledge your successful registration.
- You will receive an email at the address you listed in your account, notifying you that your account was successfully created.



Remember! You must log in to the CMS Enterprise Portal and change your password every 180 days to maintain system access.

# Registration and Training for New Agents and Brokers

If you wish to participate in the Marketplace for plan year 2021, you must complete the following actions:

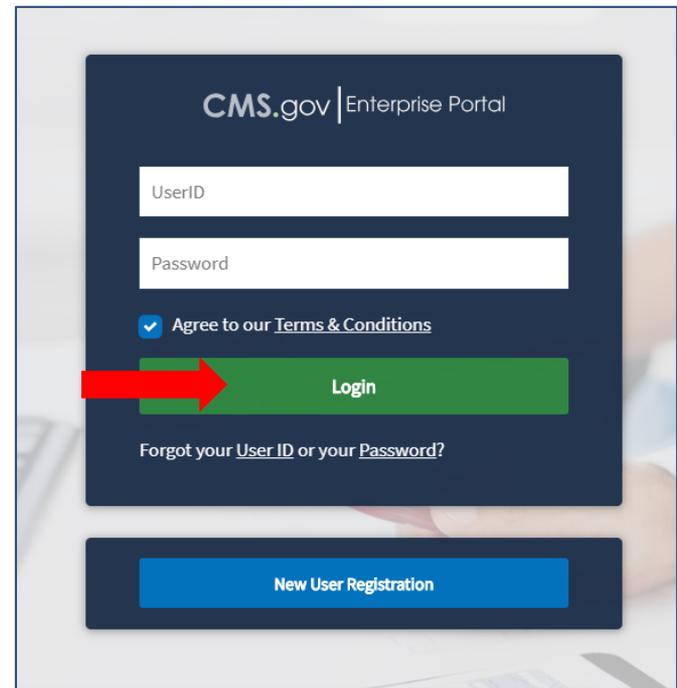
1. Create a CMS Enterprise Portal account.
2. Request the FFM Agent Broker role.
3. Complete remote identity proofing through the Enterprise Identity Management (EIDM) System.
4. Complete your agent/broker profile on the MLMS via the CMS Enterprise Portal.
5. Complete Marketplace training on the MLMS or through an HHS-approved vendor via the CMS Enterprise Portal.
6. Read and accept the applicable Marketplace Agreement(s) on the MLMS.
7. Confirm completion of all registration steps by logging back in to the “Agent Broker Registration Status” page on the CMS Enterprise Portal and printing your completion certificate.

*For a printable tip sheet with information on these steps, please see the [New Agents' and Brokers' Guide to Plan Year 2021 Marketplace Registration and Training](#) resource on the [Agents and Brokers Resources Plan Year 2021 Registration and Training](#) webpage.*

## 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 at <https://portal.cms.gov>.
- Enter your FFM User ID and the password you created when setting up your CMS Enterprise Portal account in Step 1.
- Select the check box next to “Agree to our Terms & Conditions” and then select “Login.”

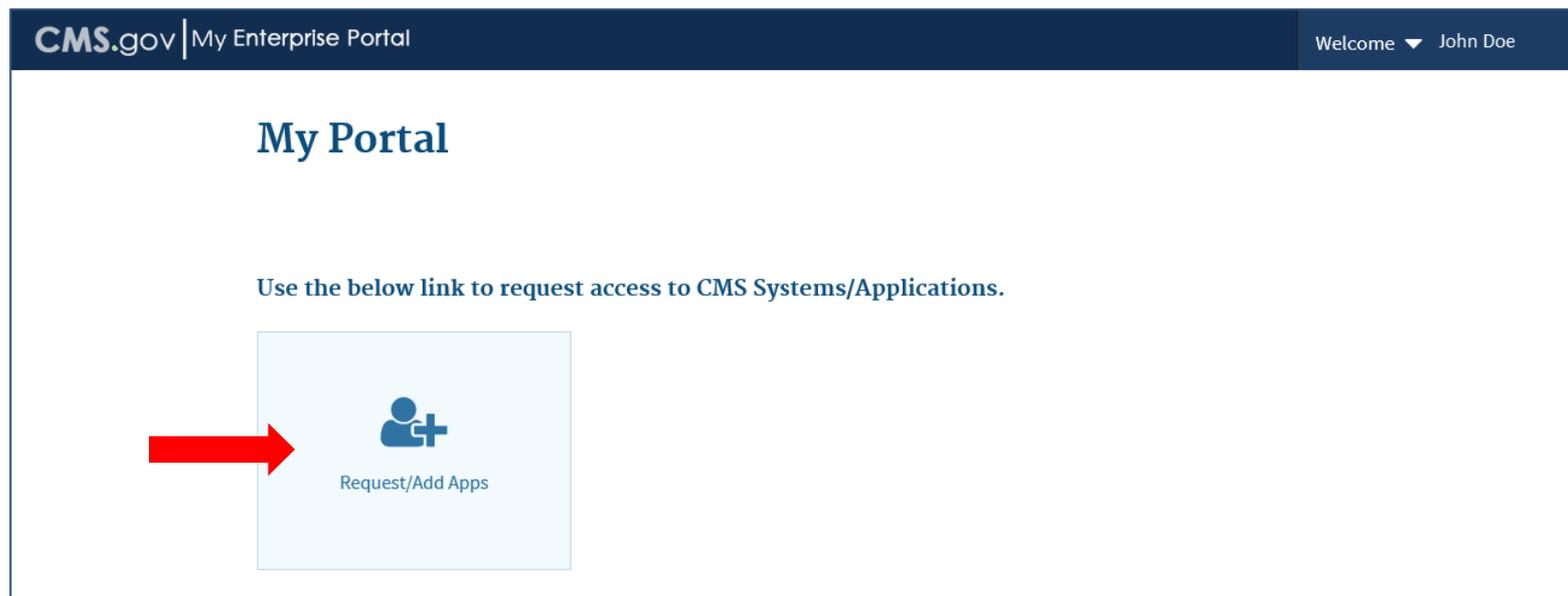
*\*Note: Even if you participated in the Marketplace for prior plan years 2014 through 2019, you will need to request the FFM Agent Broker role when you log in to your CMS Enterprise Portal account if you did not complete registration for plan year 2020.*



The image shows a screenshot of the CMS.gov Enterprise Portal login interface. The page has a dark blue background. At the top, it says 'CMS.gov | Enterprise Portal'. Below this, there are two white input fields: 'UserID' and 'Password'. Underneath the password field is a checkbox labeled 'Agree to our Terms & Conditions' with a blue checkmark. A large red arrow points to a green button labeled 'Login'. Below the 'Login' button is a link that says 'Forgot your User ID or your Password?'. At the bottom of the page, there is a blue button labeled 'New User Registration'.

# Step 2: Agent or Broker Requests the FFM Agent Broker Role (Continued)

On the “My Portal” page, select the “Request/Add Apps” button to access the Application Catalog.



# Step 2: Agent or Broker Requests the FFM Agent Broker Role (Continued)

- Enter “Fed” into the Access Catalog search bar.
- Select the “Request Access” button on the “Federally Facilitated Marketplace (FFM) / Request for MLMS Training Access” tile.

The screenshot displays the CMS.gov My Enterprise Portal Access Catalog. The search bar at the top contains the text "Start typing to filter apps...". Below the search bar, there are several application tiles. The tile for "Federally Facilitated Marketplace (FFM) / Request for MLMS Training Access" is highlighted with a red box, and a red arrow points to its "Request Access" button. Other tiles include CSR, DMEPOS Bidding System (DBidS), Electronic Correspondence Referral System (ECRS) Web, EPPE, ESD, GENTRAN, HIOS, and HPG. Each tile provides a brief description, help desk information, and a "Request Access" button.

Application Name	Description	Help Desk Information	Action
CSR	Community Based Organization/Customer Service Representative.	800-927-8009 <a href="mailto:ttesting@yahoo.com">ttesting@yahoo.com</a>	Request Access
DMEPOS Bidding System (DBidS)	Durable Medical Equipment, Prosthetics, Orthotics & Supplies (DMEPOS) Bidding System - More...	877-577-5331 <a href="mailto:ttesting@yahoo.com">ttesting@yahoo.com</a>	Request Access
Electronic Correspondence Referral System (ECRS) Web	This application allows authorized users to fill out various online forms and electronic... More...	848-458-8740 <a href="mailto:ttesting@yahoo.com">ttesting@yahoo.com</a>	Request Access
EPPE	The Enterprise Privacy Policy Engine (EPPE) automates and governs the CMS data use agreeme... More...	TBD <a href="#">TBD</a>	Request Access
ESD		N/A <a href="#">N/A</a>	Request Access
Federally Facilitated Marketplace (FFM) / Request for MLMS Training Access	Click <b>Request Access</b> to obtain system access.	855-267-1515 <a href="mailto:CMS_FEPS@cms.hhs.gov">CMS_FEPS@cms.hhs.gov</a>	Request Access
GENTRAN	Gentran Integration Suite (GIS) provides secure Internet-based file transfer capabilities. More...	877-577-5331 <a href="mailto:cbic.admin@palmettoqba.com">cbic.admin@palmettoqba.com</a>	Request Access
HIOS	The Health Insurance Oversight System is the federal government's primary data collection	855-267-1515 <a href="mailto:CMS_FEPS@cms.hhs.gov">CMS_FEPS@cms.hhs.gov</a>	Request Access
HPG	HIPAA Eligibility Transaction System (HETS) Provider Graphical User Interface (GUI). More...	<a href="mailto:DEXSupport@cms.hhs.gov">DEXSupport@cms.hhs.gov</a>	Request Access

# Step 2: Agent or Broker Requests the FFM Agent Broker Role (Continued)

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

### My Access

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

### Request New System Access

Select a System and then a role to request access.

Depending on your Level of Assurance (LOA) and the role that you request access to, to satisfy system security requirements you may need to complete [Identity Verification](#), establish credentials for [Multi-Factor Authentication \(MFA\)](#), or change your password the next time you login to the system. This may require you to provide additional information as part of the role request process. If applicable, please note that your request cannot be fulfilled until Identity Verification is complete and Multi-Factor Authentication (MFA) is established.

\* System Description:  ←

\* Role:  ←

←

# Registration and Training for New Agents and Brokers

If you wish to participate in the Marketplace for plan year 2021, you must complete the following actions:

1. Create a CMS Enterprise Portal account.
2. Request the FFM Agent Broker role.
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4. Complete your agent/broker profile on the MLMS via the CMS Enterprise Portal.
5. Complete Marketplace training on the MLMS or through an HHS-approved vendor via the CMS Enterprise Portal.
6. Read and accept the applicable Marketplace Agreement(s) on the MLMS.
7. Confirm completion of all registration steps by logging back in to the “Agent Broker Registration Status” page on the CMS Enterprise Portal and printing your completion certificate.

*For a printable tip sheet with information on these steps, please see the [New Agents' and Brokers' Guide to Plan Year 2021 Marketplace Registration and Training](#) resource on the [Agents and Brokers Resources Plan Year 2021 Registration and Training webpage](#).*

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

- After selecting “Submit,” new Portal account users will be prompted to complete identity proofing.
- Read the instructions and then select “Next” to begin the identity verification process

**My Access**

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

**Identity Verification**

To protect your privacy, you will need to complete Identity Verification successfully, before requesting access to the selected role. Below are a few items to keep in mind.

- Ensure that you have entered your legal name, current home address, primary phone number, date of birth and E-mail address correctly. We will only collect personal information to verify your identity with Experian, an external Identity Verification provider.
- Identity Verification involves Experian using information from your credit report to help confirm your identity. As a result, you may see an entry called a “soft inquiry” on your Experian credit report. Soft inquiries do not affect your credit score and you do not incur any charges related to them.
- You may need to have access to your personal and credit report information, as the Experian application will pose questions to you, based on data in their files. For additional information, please see the Experian Consumer Assistance website -<http://www.experian.com/help/>

If you elect to proceed now, you will be prompted with a Terms and Conditions statement that explains how your Personal Identifiable Information (PII) is used to confirm your identity. To continue this process, select ‘Next’.

 **Next** **Cancel**

- On the following screen, read the terms and conditions and accept them by selecting the check box next to “I agree to the terms and conditions.” Then, select “Next.”

# Step 3: Agent or Broker Completes 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 “Next” to submit your information for verification.

**My Access**

[Request New System Access](#)

[View and Manage My Access](#)

[Annual Certification](#)

**Your Information** Verify Your Identity

Enter your legal first name and last name, as it may be required for Identity Verification.

\* First Name:

\* Last Name:  Suffix:

Enter your E-mail address, as it will be used for account related communications.

\* E-mail Address:

Re-enter your E-mail address.

\* Confirm E-mail Address:

# Step 3: Agent or Broker Completes Identity Proofing within CMS Enterprise Portal (Continued)

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

## My Access

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

Your Information **Verify Your Identity**

### Verify Identity

Which one of the following retail credit cards do you have? If there is not a matched retail credit card, please select 'NONE OF THE ABOVE'.

- BED BATH AND BEYOND
- THE TIE BAR
- CABI
- JJ BUCKLEY
- NONE OF THE ABOVE/DOES NOT APPLY

Please select the county for the address you provided.

- ARLINGTON
- MONTGOMERY
- PRINCE GEORGE
- DISTRICT OF COLUMBIA
- NONE OF THE ABOVE/DOES NOT APPLY

According to our records, you previously lived on (RIVERSCAPE). Please choose the city from the following list where this street is located.

- FAIRFAX STATION
- WOODBRIDGE
- GREAT FALLS
- BURKE
- NONE OF THE ABOVE/DOES NOT APPLY

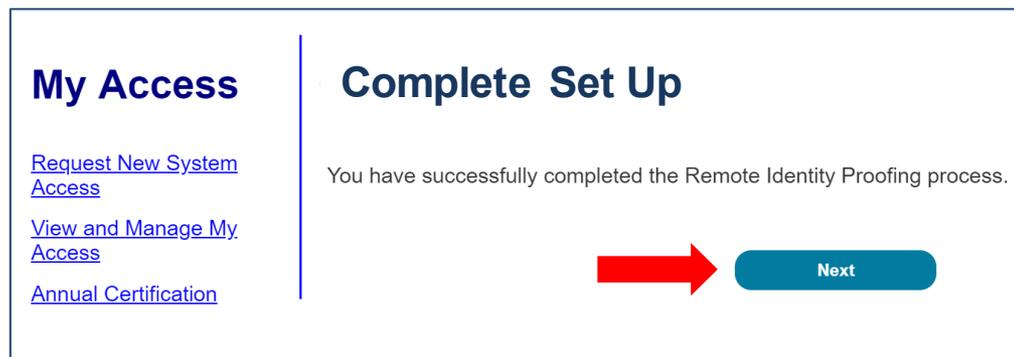
Which of the following is a previous phone number of yours? If there is not a matched phone number, please select 'NONE OF THE ABOVE'.

- (202)205-3463
- (202)227-6100
- (202)215-7826
- (202)234-2034
- NONE OF THE ABOVE/DOES NOT APPLY

**Next** **Cancel**

# Step 3: Agent or Broker Completes Identity Proofing within CMS Enterprise Portal (Continued)

- After you receive confirmation that your identity has been verified, select “Next.”
- 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, which is CMS’ identity proofing vendor.
- You will then receive a logout message. Select “OK,” and you will be logged out and redirected to the CMS Enterprise Portal home page.



# Registration and Training for New Agents and Brokers

If you wish to participate in the Marketplace for plan year 2021, you must complete the following actions:

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5. Complete Marketplace training on the MLMS or through an HHS-approved vendor via the CMS Enterprise Portal.
6. Read and accept the applicable Marketplace Agreement(s) on the MLMS.
7. Confirm completion of all registration steps by logging back in to the “Agent Broker Registration Status” page on the CMS Enterprise Portal and printing your completion certificate.

*For a printable tip sheet with information on these steps, please see the [New Agents' and Brokers' Guide to Plan Year 2021 Marketplace Registration and Training](#) resource on the [Agents and Brokers Resources Plan Year 2021 Registration and Training](#) webpage.*

# Step 4: Agent or Broker Completes MLMS Profile

After completing identity proofing, you have the option to complete training either through the MLMS or the Department of Health & Human Services (HHS)-approved vendor, America's Health Insurance Plans (AHIP).

- If you choose to complete training through the HHS-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 (i.e., sign) the applicable Marketplace Agreement(s) after you have completed training.



*\*Additional details about the HHS-approved vendor training will be reviewed during Step 5b.*

# Step 4: Agent or Broker Completes MLMS Profile (Continued)

- To complete your MLMS profile and access both the CMS-developed training and training offered through AHIP, log back in to the CMS Enterprise Portal using the FFM User ID and password you created in Step 1.\*
- After you are directed to the “Agent Broker Registration Status” page, select the “Complete Agent Broker Training” link.

**Agent Broker Registration Status**

**Plan Year 2021**

Please click the link below next to items marked 'INCOMPLETE' to register as an agent/broker for the 2018 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
<input type="radio"/> Individual Market <input type="radio"/> SHOP	
3. Print Certificate(s)	Accessible after completing steps 1 & 2.

\* You may also navigate to your MLMS profile from the “MLMS Landing Page” using the “My Profile” hyperlink.

# Step 4: Agent or Broker Completes MLMS Profile (Continued)

- To access your 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.
- This is also the page where you may access training via the HHS-approved vendor, AHIP.

## **Plan Year 2021 Agent/Broker Training Options**

Agents and brokers have new options to complete Individual Marketplace and/or SHOP training for the 2021 plan year. These include a third-party vendor. 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.

○ America’s Health Insurance Plans

[Learn More](#)

[Access Training](#)

○ Marketplace Learning Management System (CMS)

[Access Training](#)

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

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

# Step 4: Agent or Broker Completes MLMS Profile (Continued)

The MLMS profile page will appear in a separate window for you to complete your profile information.

Portal Help & FAQs Print Log Out Text Size [+][-]

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

I am a:

### Find Local Help

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:

### Business Profile

Street Address \*

City \*

State \*

Zip Code \*

Phone \*

Email \*

URL

National Producer Number \*

Confirm NPN \*

Preferred method of contact \*

Preferred Language

### Hours of Operation

From \*

To \*

Time Zone \*

Work Days \*  Monday  Tuesday  Wednesday  Thursday  Friday  Saturday  Sunday

### Business Entity Profile

Web-Based Entity Profile

To save your profile information, please click "Save" below.

Save

# Step 4: Agent or Broker Completes MLMS Profile (Continued)

You will need to select one role from four options. Then, your appropriate role will show or hide the corresponding profile fields.

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

I am :

- Only an Individual Marketplace Agent Broker
- Only a SHOP Marketplace Agent Broker
- Both an Individual and SHOP Marketplace Agent Broker
- Not an Agent Broker

Business Profile

To save your profile information, please click "Save" below.

Save

# Step 4: Agent or Broker Completes MLMS Profile (Continued)

The information you use to complete your MLMS profile will be used to populate [Find Local Help](#) at HealthCare.gov and Help On Demand so consumers, small employers, and small business employees can find you for assistance.\*

## Find Local Help and Help On Demand\*\*

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 and Help On Demand options

I would like all my contact information displayed but only for my home state.

-Select One-

I would like all my contact information displayed for all states where I have a valid health license.

I would like my contact information, except my street address, displayed for all states where I have a valid health license.

I would like all my contact information displayed but only for my home state.

I don't want my contact information displayed and do not want to participate in Find Local Help or Help on Demand.

\*Find Local Help is also available in [Spanish](#).

\*\* Help On Demand is a consumer assistance referral system that connects individuals on HealthCare.gov with Marketplace-registered, licensed agents and brokers in their area who can provide immediate assistance with Marketplace plan selection and enrollment.

# 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 National Producer Number (NPN) by selecting the appropriate "+" link at the bottom of the profile page.
- You can list up to three NPNs in your MLMS profile.

The screenshot displays a web form for completing an MLMS profile. The form includes the following fields and sections:

- Contact Information:** Phone \* (3014608038), Email \* (jjones001@gmail.com), URL, National Producer Number \* (23456), Confirm NPN \* (23456), Preferred method of contact \* (Email address), Preferred Language (English).
- Hours of Operation:** From \* (09:00 AM), To \* (04:00 PM), Time Zone\* (Eastern Time (EST)).
- Work Days \*:** Monday , Tuesday , Wednesday , Thursday , Friday , Saturday , Sunday .
- Entity Profile Selection:** A red box highlights two expandable sections: "Business Entity Profile" and "Web-Based Entity Profile".
- Navigation:** "Save" and "Next" buttons are located at the bottom right.

*\*It is recommended that the agency designate only **one** user to act as the authorized representative for the business or web-broker entity for MLMS training completion.*

# Step 4: Agent or Broker Completes MLMS Profile (Continued)

- Enter the information for the web-broker or business entity with which you are affiliated.
- 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.

**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 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 \*

Business Entity Zip Code \*

Business Entity Phone \*

Business Entity Email \*

Business Entity URL

Business Entity National Producer Number (NPN) \*

Confirm NPN \*

# Step 4: Agent or Broker Completes MLMS Profile (Continued)

Once you have entered all your profile information, select “Save/Update” and then select “Next.”

The screenshot shows a web form for completing an MLMS profile. The form is divided into several sections:

- Personal Information:** Fields for Phone (\*), Email (\*), URL, National Producer Number (\*), Confirm NPN (\*), Preferred method of contact (\*), and Preferred Language.
- Hours of Operation:** Fields for From (\*), To (\*), Time Zone\*, and Work Days (\*).
- Business Entity Profile:** A section with a plus icon and a dropdown arrow.
- Web-Based Entity Profile:** A section with a plus icon and a dropdown arrow.

At the bottom right of the form, there are two buttons: "Save" and "Next". Red arrows point to these buttons with the following instructions:

- "To save your profile information, please click "Save" below."
- "To proceed without updating your profile information, please click "Next" below."

# Step 4: Agent or Broker Completes MLMS Profile (Continued)

You must enter a correct NPN in your MLMS profile to receive credit for completing Marketplace 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 not the same as your state license number. Be sure to use your NPN, not a state license number.
- To update the NPN, you can select the “Complete Agent Broker Training” hyperlink and update the information in your MLMS profile.
- Agent and broker NPNs can be found at [www.nipr.com/PacNpnSearch.htm](http://www.nipr.com/PacNpnSearch.htm).

Be sure to confirm your NPN is correct in your MLMS profile.  
Entering an inaccurate NPN could result in denial of compensation/credit by an issuer.

# Registration and Training for New Agents and Brokers

If you wish to participate in the Marketplace for plan year 2021, you must complete the following actions:

1. Create a CMS Enterprise Portal account.
2. Request the FFM Agent Broker role.
3. Complete remote identity proofing through the Enterprise Identity Management (EIDM) System.
4. Complete your agent/broker profile on the MLMS via the CMS Enterprise Portal.
5. Complete Marketplace training on the MLMS or through an HHS-approved vendor via the CMS Enterprise Portal.
6. Read and accept the applicable Marketplace Agreement(s) on the MLMS.
7. Confirm completion of all registration steps by logging back in to the “Agent Broker Registration Status” page on the CMS Enterprise Portal and printing your completion certificate.

*For a printable tip sheet with information on these steps, please see the [New Agents' and Brokers' Guide to Plan Year 2021 Marketplace Registration and Training](#) resource on the [Agents and Brokers Resources Plan Year 2021 Registration and Training webpage](#).*

# Step 5: Agent or Broker Completes Training

- The steps for completing agent and broker training differ depending upon the training option you choose.
- You have two options for training via the CMS Enterprise Portal:
  - CMS-developed training through the MLMS (Individual Marketplace and Small Business Health Options Program [SHOP])
  - Training offered through the HHS-approved vendor, AHIP (Individual Marketplace only\*)
- Training is only required for participation in the Individual Marketplace. Agents and brokers who participate in the SHOP are encouraged, but not required, to complete SHOP training.

\*Note: The SHOP curriculum is not available through the HHS-approved vendor.

# Step 5: Agent or Broker Completes Training (Continued)

- For plan year 2021, Marketplace Agent and Broker Training for new agents and brokers has 10 core training modules available:
  - Introduction
  - Affordable Care Act Basics
  - Marketplace Basics
  - Eligibility for Enrolling in a QHP
  - Eligibility for Insurance Affordability Programs
  - Enrolling in a QHP
  - Privacy Standards and Definitions
  - Protecting and Handling Personally Identifiable Information
  - Information Security
  - SHOP
- There are three exams\* associated with the training:
  - Basics Exam
  - Individual Marketplace Exam
  - Privacy and Security Standards Exam

\* You must obtain a score of 70% or higher to pass each exam module. If you do not pass, you can re-take the exam.

# Step 5: Agent or Broker Completes Training (Continued)

## Marketplace Training for Agents and Brokers Now Includes Audio.

- The audio will automatically begin to play when the training is launched.
- You can select the Play/Pause icon at any time to pause the audio or use the Mute icon to silence the audio.
- An accessible version of the audio is available by selecting the Transcript icon.
- Adjust the volume settings on your speakers or headset as needed.

**Marketplace Basics** 3 / 42 | Exit >

### Introduction

The health care law created the Health Insurance Marketplace<sup>®</sup> to help enroll people in qualified health plans (QHPs) and determine whether people are eligible for financial assistance. The Marketplace organizes health insurance options to help consumers shop for coverage in a way that permits comparison of available plan options based on price, benefits and services, and quality.

Upon completion of this module, you should be able to:

- Define the term "Marketplace" and identify its key functions
- Identify characteristics of a QHP
- Define Consumer Operated and Oriented Plans (CO-OP) and stand-alone dental plans
- Identify any federal programs that provide health coverage to Marketplace consumers
- Identify the roles of agents, brokers, and web-brokers in the Individual Marketplace and the Small Business Health Options Program (SHOP)
- Identify the roles of Navigators and certified application counselors (CACs) in the Marketplace
- Describe how agents and brokers are compensated for their participation in the Individual Marketplace and the SHOP
- Identify the entities that are responsible for monitoring agent and broker compliance with applicable laws and standards
- Understand the circumstances that may result in termination or suspension of an agent's or broker's Marketplace Agreement(s) with the Centers for Medicare & Medicaid Services (CMS)

\*When used in this document, the term "Health Insurance Marketplace<sup>®</sup>" or "Marketplace" refers to Federally-facilitated Marketplaces (FFMs), including FFMs where states perform plan management functions, and also refers to State-based Marketplaces on the Federal Platform (SBM-FPs).

Health Insurance Marketplace • Plan Year 2021

# Step 5a: Agent or Broker Completes MLMS Training

- After completing your MLMS profile, you will be redirected to the MLMS landing page.
- Select “Training Options” on the left sidebar.

The screenshot displays the MLMS landing page interface. On the left, a sidebar menu contains the following items: Home, Current Learning, Curriculum Status, and Training Options. The 'Training Options' item is highlighted with a red rectangular border. The main content area is divided into several sections:

- How to Get Started**: Includes instructions on completing vendor training and CMS training in English.
- Agent Broker Help**: Contains a 'Preparing your computer for the MLMS' section and a 'Need Help?' section with contact information for the MLMS help desk.
- Agent Broker Resources**: Lists links for 'My Profile', 'Registration Completion Certificate', 'SHOP Privacy and Security Agreement', 'IM General Agreement', 'IM Privacy and Security Agreement', 'Training Resources', and 'Address Tip Sheet'.
- Agent Broker Announcements**: A section for updates.
- Current Learning**: A section that currently displays 'No items found.'
- Training Options**: A table listing training modules.

Recommendation	Recommendation Type	Sources	Recommended On	Actions
PY2021 AB Marketplace Training – Individual Marketplace (IM)_Load2	Curriculum	(1)AgentBroker	08/20/2018	Actions

*Note: These screenshots apply to the option to complete CMS-developed training in the MLMS, which does not offer continuing education units (CEUs). If you chose to take training through the HHS-approved vendor, reference Step 5b.*

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

- Identify the curriculum you wish to enroll in, and hover your cursor over the “Actions” link to the right of that curriculum.
- In the “Actions” bubble, select the “Begin Enrollment” link.

The screenshot displays the 'Training Options' page. At the top, there are three tabs: 'Active' (selected), 'Bookmarked', and 'Ignored'. Below the tabs, there is a 'Recommendations' section with a filter for 'Recommended in the Past (Days)' set to 10 and a 'Recommendation Type' dropdown set to 'All'. A 'Restore Defaults' button is located below the filter. A checkbox for 'Group by Recommendation Type' is present. The main content is a table titled 'Active Recommendations' with the following data:

<input type="checkbox"/>	Recommendation	Recommendation Type	Sources	Recommended On	Actions
<input type="checkbox"/>	PY2021 AB Marketplace Training – Individual Marketplace (IM)	Curriculum	(1)AgentBroker	06/20/2018	Actions
<input type="checkbox"/>	PY2021 AB Marketplace Training – Small Business Health Options Program (SHOP)	Curriculum	(1)AgentBroker	06/20/2018	Actions

*Note: These screenshots apply to the option to complete CMS-developed training in the MLMS, which does not offer CEUs. If you chose to take training through the HHS-approved vendor, reference Step 5b.*

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

A page opens with the selected curriculum, including a list of the modules it includes. Select “Complete Enrollment” at the top of the screen.

Register for PY2021 Marketplace Training – Individual Marketplace (IM)\_

To register for PY2019 AB Marketplace Training – Individual Marketplace (IM)\_Load2, verify the path, select modules and learning elements within the module that you would like to complete. [See complete registration guidelines.](#) **Complete Enrollment**

Path: MLMS  
Note: Actual seat availability might vary at the time of registration, due to existing registrations.

If selected courses are already assigned to learners, then an order is not placed for those courses again. If you do not select any new offering and all selected courses are already assigned to learners, then the following warning is displayed: "There were no items to register for."

**MLMS (Complete 14 of 14 Required) Required**

<input checked="" type="checkbox"/>		PY2019_MLMS_AB_01 Introduction to Marketplace Agent and Broker Training_Load2 (Course : 00002545, Version 2019)
<input type="radio"/>		Offering ID: 00002686 Language: English Offered As: Web Based Training Suggested <a href="#">Change Offering</a>
<input checked="" type="checkbox"/>		PY2019_MLMS_AB_02 Affordable Care Act Basics_Load2 (Course : 00002546, Version 2019)
<input type="radio"/>		Offering ID: 00002688 Language: English Offered As: Web Based Training Suggested <a href="#">Change Offering</a>
<input checked="" type="checkbox"/>		PY2019_MLMS_AB_03 Marketplace Basics_Load2 (Course : 00002547, Version 2019)
<input type="radio"/>		Offering ID: 00002690 Language: English Offered As: Web Based Training Suggested <a href="#">Change Offering</a>

*Note: These screenshots apply to the option to complete CMS-developed training in the MLMS, which does not offer CEUs. If you chose to take training through the HHS-approved vendor, reference Step 5b.*

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

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

Registration Confirmation

[Printer Friendly Version](#)

Order Contact: fname lname  
Billed To: AgentBroker  
Order Status: Confirmed  
Order Number: 00059113

Order Items

Title	Learners	Delivery Type	Status	Actions
<input checked="" type="checkbox"/> PY2021 Marketplace Training - Individual Marketplace (IM)_Load2	fname lname			

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

*Note: These screenshots apply to the option to complete CMS-developed training in the MLMS, which does not offer CEUs. If you chose to take training through the HHS-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 modules have prerequisites, so there may not be a "Launch" button next to each module.

The screenshot displays a user interface for 'Current Learning'. At the top, there are navigation links: 'All | Courses | Curriculum | |'. Below this is a 'Sort By' dropdown menu set to 'Registration Date' and a 'Go' button. The main content area shows a course card for 'PY2021\_MLMS\_AB\_01 Introduction to Marketplace Agent and Broker Training'. The course card includes a small icon of a computer monitor with a mouse cursor, the course title, 'Status: Confirmed', 'Registration Date: 06/20/2018', and a 'View Details' link. Below the course title, it lists 'Course ID: 00002545' and 'Duration: 00:00 hours'. A 'Hide Learning Assignments' button is visible. At the bottom of the course card, there is a section for 'Training Content: AB\_PY2019\_Basics\_Intro to Marketplace AB Training' with a status of 'Status: Not Evaluated (Unlimited attempts)'. A red arrow points to the 'Launch' button located to the right of this section.

*Note: These screenshots apply to the option to complete CMS-developed training in the MLMS, which does not offer CEUs. If you chose to take training through the HHS-approved vendor, reference Step 5b.*

# Step 5b: Agent or Broker Completes HHS-approved Vendor Training

- In addition to the CMS-developed training on the MLMS, which does not offer CEUs, AHIP is approved to offer Individual Marketplace training for plan year 2021.\*
- AHIP is required to offer CEUs in a minimum of five states where the Marketplace operates (45 CFR § 155.222).
  - You can use these CEUs to meet state licensure requirements for continuing education.
  - For more information on individual state CEU requirements, check with your state’s Department of Insurance.
  - The list of states where AHIP offers CEUs is available on the CMS Enterprise Portal “Agent/Broker Training Options” page by selecting AHIP’s “Learn More” link.



*\*Note: The SHOP curriculum is not available through the HHS-approved vendor.*

# Step 5b: Agent or Broker Completes HHS-approved Vendor Training (Continued)



- AHIP charges a fee to take its training.
- Fees for plan year 2021 will range from \$20-\$100 depending on the curriculum completed, and CEUs are available for an additional fee.

Completing Marketplace training through the HHS-approved vendor still requires you to execute the applicable Agreement(s) on the MLMS prior to assisting consumers seeking to enroll in coverage through the Marketplace.

# Step 5b: Agent or Broker Completes HHS-approved Vendor Training (Continued)

- If you chose to complete training through the HHS-approved vendor, AHIP, you must access AHIP’s training via the CMS Enterprise Portal. You cannot go directly to AHIP’s website to access the training content.
- Select the “Access Training” link for AHIP, and the CMS Enterprise Portal will redirect you to the AHIP website.
- CMS recommends taking the HHS-approved vendor training prior to completing your MLMS profile (i.e., complete Step 5b before Step 4).

## **Plan Year 2021 Agent/Broker Training Options**

Agents and brokers have new options to complete Individual Marketplace and/or SHOP training for the 2021 plan year. These include a third-party vendor. 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.

○ America’s Health Insurance Plans

[Learn More](#)

[Access Training](#)

○ Marketplace Learning Management System (CMS)

[Access Training](#)

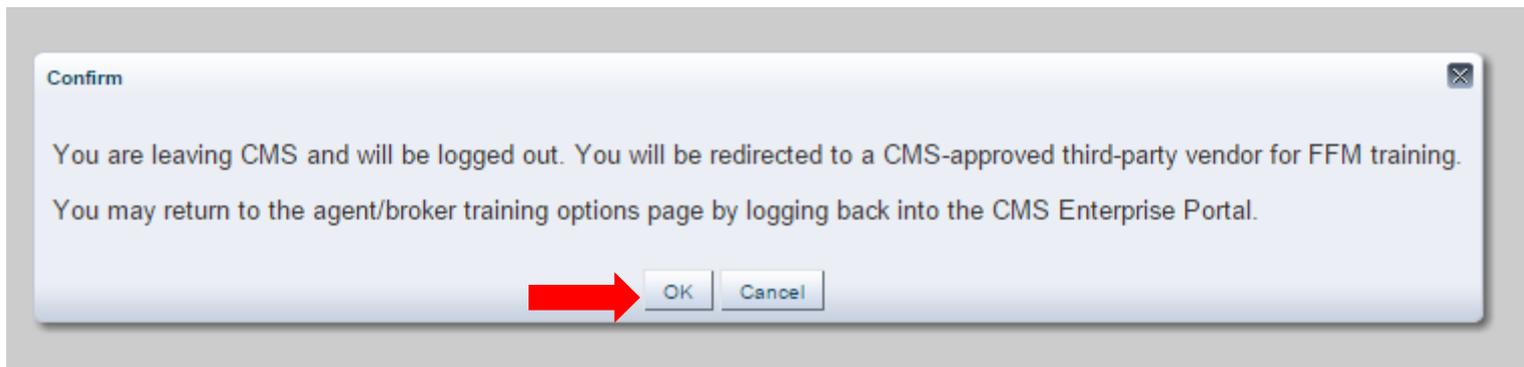
[MLMSHelpDesk@cms.hhs.gov](mailto:MLMSHelpDesk@cms.hhs.gov)

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

*Note: These screenshots apply to the option to complete HHS-approved vendor training. If you chose to complete CMS-developed training in the MLMS, reference Step 5a.*

# Step 5b: Agent or Broker Completes HHS-approved Vendor Training (Continued)

- The pop-up box below will appear.
- Select “OK” to confirm you want to be redirected to AHIP’s website. This action will automatically log you out of the CMS Enterprise Portal.



*Note: These screenshots apply to the option to complete HHS-approved vendor training. If you chose to complete CMS-developed training in the MLMS, reference Step 5a.*

# Step 5b: Agent or Broker Completes HHS-approved Vendor Training (Continued)

Once you complete the training through the HHS-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 AHIP's FFM Training for the **Federally-Facilitated Individual Marketplace Training**.

Your results for having satisfied your training requirements through AHIP 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://portalval.cms.gov/wps/myportal/cmsportal/mlms/training>). 

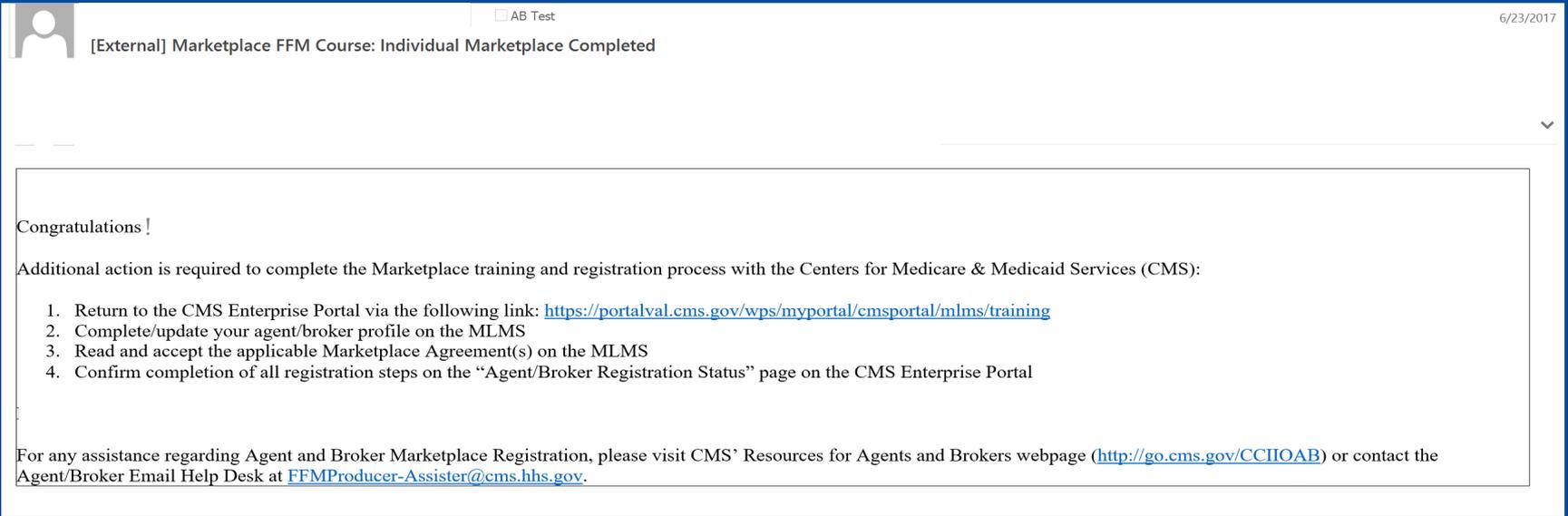
If you have any questions concerning AHIP's FFM Training, please feel free to contact us at [vendorsupport@vendorsupport.org](mailto:vendorsupport@vendorsupport.org). For any assistance regarding Agent and Broker Registration with the FFM, please contact [FFMProducer-Assister@cms.hhs.gov](mailto:FFMProducer-Assister@cms.hhs.gov).

**Remember! You cannot enroll consumers in Marketplace coverage or be compensated for your work until you return to the MLMS and complete all the steps in the registration process.**

*Note: These screenshots apply to the option to complete HHS-approved vendor training. If you chose to complete CMS-developed training in the MLMS, reference Step 5a.*

# Step 5b: Agent or Broker Completes HHS-approved Vendor Training (Continued)

You will also receive a confirmation email from AHIP confirming completion of the training and detailing how to continue with Marketplace registration on the MLMS.



The screenshot shows an email interface with a header bar containing a profile icon, a checkbox for 'AB Test', and the date '6/23/2017'. The main subject line reads '[External] Marketplace FFM Course: Individual Marketplace Completed'. The body of the email contains a congratulatory message and a list of four steps for completing the registration process. At the bottom, there is contact information for CMS resources.

[External] Marketplace FFM Course: Individual Marketplace Completed 6/23/2017

AB Test

Congratulations !

Additional action is required to complete the Marketplace training and registration process with the Centers for Medicare & Medicaid Services (CMS):

1. Return to the CMS Enterprise Portal via the following link: <https://portalval.cms.gov/wps/myportal/cmsportal/mlms/training>
2. Complete/update your agent/broker profile on the MLMS
3. Read and accept the applicable Marketplace Agreement(s) on the MLMS
4. Confirm completion of all registration steps on the "Agent/Broker Registration Status" page on the CMS Enterprise Portal

For any assistance regarding Agent and Broker Marketplace Registration, please visit CMS' Resources for Agents and Brokers webpage (<http://go.cms.gov/CCIOAB>) or contact the Agent/Broker Email Help Desk at [FFMProducer-Assister@cms.hhs.gov](mailto:FFMProducer-Assister@cms.hhs.gov).

*Note: These screenshots apply to the option to complete HHS-approved vendor training. If you chose to complete CMS-developed training in the MLMS, reference Step 5a.*

# Registration and Training for New Agents and Brokers

If you wish to participate in the Marketplace for plan year 2021, you must complete the following actions:

1. Create a CMS Enterprise Portal account.
2. Request the FFM Agent Broker role.
3. Complete remote identity proofing through the Enterprise Identity Management (EIDM) System.
4. Complete your agent/broker profile on the MLMS via the CMS Enterprise Portal.
5. Complete Marketplace training on the MLMS or through an HHS-approved vendor via the CMS Enterprise Portal.
6. Read and accept the applicable Marketplace Agreement(s) on the MLMS.
7. Confirm completion of all registration steps by logging back in to the “Agent Broker Registration Status” page on the CMS Enterprise Portal and printing your completion certificate.

*For a printable tip sheet with information on these steps, please see the [New Agents' and Brokers' Guide to Plan Year 2021 Marketplace Registration and Training](#) resource on the [Agents and Brokers Resources Plan Year 2021 Registration and Training](#) webpage.*

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

- If you chose to take training from the HHS-approved vendor, you will need to log back into the MLMS via the CMS Enterprise Portal to execute the applicable Marketplace Agreement(s).
- You must execute the Agreement(s) associated with the Marketplace(s) you are participating in:
  - Individual Marketplace General Agreement
  - Individual Marketplace Privacy and Security Agreement
  - SHOP Privacy and Security Agreement



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

- You must request the FFM Agent Broker role and complete/update your MLMS profile information, complete identity proofing,\* and complete the required training and exams before you can sign the Agreement(s).
- Once you have completed the training (which is required for the Individual Marketplace and optional for SHOP), you will need to sign the Agreement(s).
- After launching the appropriate Agreement module, review the Agreement language by selecting “Next” at the bottom of each screen to advance through the Agreement, and select “I Agree” 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 then click **Submit**.

I Agree 

I Do Not Agree

**Submit**

\*Note: If you completed identity proofing in a previous plan year, you do not need to complete it again.

# Registration and Training for New Agents and Brokers

If you wish to participate in the Marketplace for plan year 2021, you must complete the following actions:

1. Create a CMS Enterprise Portal account.
2. Request the FFM Agent Broker role.
3. Complete remote identity proofing through the Enterprise Identity Management (EIDM) System.
4. Complete your agent/broker profile on the MLMS via the CMS Enterprise Portal.
5. Complete Marketplace training on the MLMS or through an HHS-approved vendor via the CMS Enterprise Portal.
6. Read and accept the applicable Marketplace Agreement(s) on the MLMS.
7. Confirm completion of all registration steps by logging back in to the “Agent Broker Registration Status” page on the CMS Enterprise Portal and printing your completion certificate.

*For a printable tip sheet with information on these steps, please see the [New Agents' and Brokers' Guide to Plan Year 2021 Marketplace Registration and Training](#) resource on the [Agents and Brokers Resources Plan Year 2021 Registration and Training webpage](#).*

# Step 7: Agent or Broker Confirms Completion on the Agent/Broker Registration Status Page

- After you have executed the applicable Marketplace 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 percent 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.

**CMS.gov** | My Enterprise Portal My Apps

## My Access

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

### Plan Year 2021

#### Agent Broker Registration Status

Please click the link below next to items marked 'INCOMPLETE' to register as an agent/broker for the 2018 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 16.0 seconds.

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

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

CMS.gov | My Enterprise Portal ☰ My Apps

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### My Access

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

## Plan Year 2021

### Agent Broker Registration Status

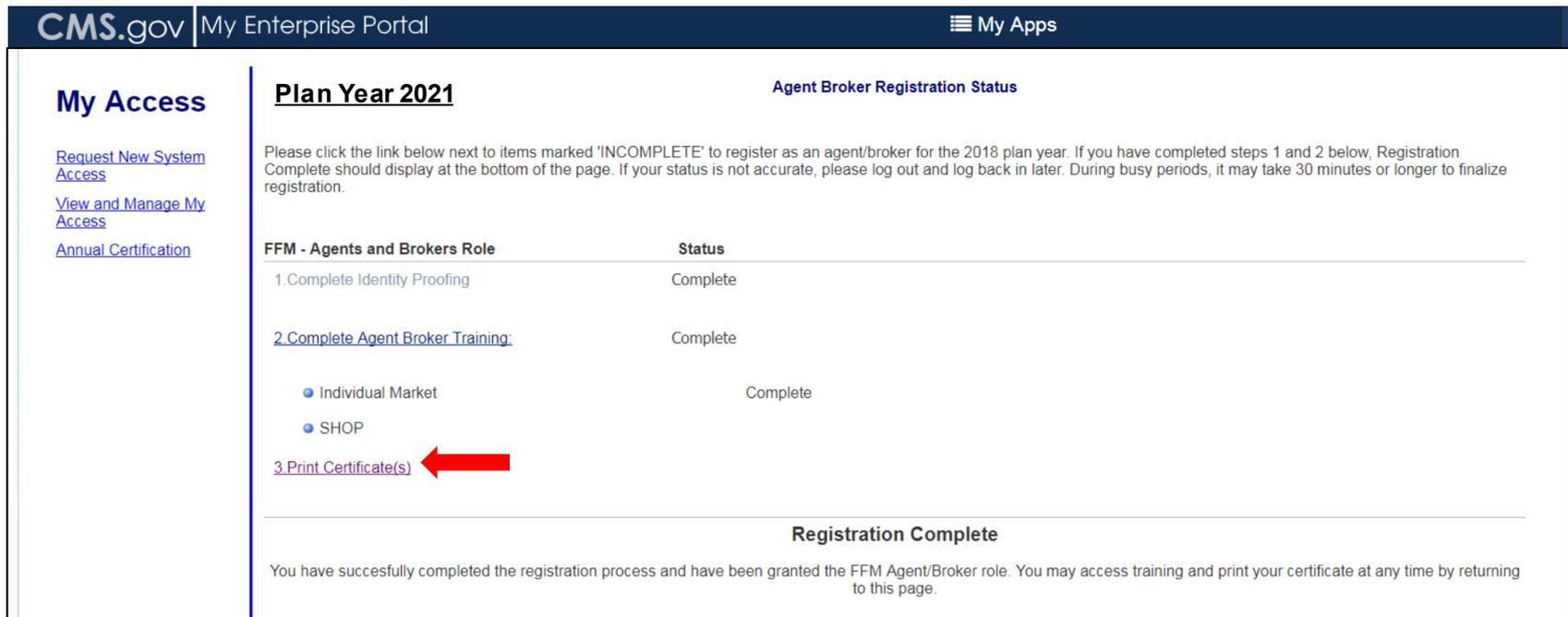
Please click the link below next to items marked 'INCOMPLETE' to register as an agent/broker for the 2018 plan year. If you have completed steps 1 and 2 below, Registration Complete should display at the bottom of the page. If your status is not accurate, please log out and log back in later. During 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. <a href="#">Print Certificate(s)</a>	

---

### Registration Complete

You have successfully completed the registration process and have been granted the FFM Agent/Broker role. You may access training and print your certificate at any time by returning to this page.



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

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

**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 Help**

**Preparing your computer for the MLMS**

Need Help? Please click on the Help Desk link at the bottom of the page to send an email to the MLMS help desk

Support is available during the following times.

- Monday – Friday: 9:00 AM - 5:30 PM EST

**Agent Broker Resources**

- [My Profile](#)
- [Print your Registration Completion Certificate](#)
- [Agent Broker SHOP Privacy and Security Agreement](#)
- [Agent Broker IM General Agreement](#)
- [Agent Broker IM Privacy and Security Agreement](#)
- [Agent Broker Training Resources](#)
- [Address Tip Sheet](#)

**Agent Broker Announcements**

**Current Learning**

Name	Status	Action
PY2019_MLMS_AB_01 Introduction to Marketplace Agent and Broker Training_Load2 Location: Online	In-Progress	<a href="#">Launch</a>
PY2019_MLMS_AB_02 Affordable Care Act Basics_Load2 Location: Online	In-Progress	<a href="#">Launch</a>
PY2019_MLMS_AB_03 Marketplace Basics_Load2 Location: Online	In-Progress	<a href="#">Launch</a>
PY2019_MLMS_AB_04 Basics Exam_Load2 Location: Online	In-Progress	<a href="#">View Details</a>

# 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.”

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** [Redacted] View [Active](#)

Name:  Show Required Curriculum Only

Status:

[Configure](#) | [Save Search Query](#)

**Internal Curriculum** Add Curriculum | [Modify Table](#)

Showing 1 out of 1 results

Name	Selected Path (% Complete)	Mastery Score	Status	Assigned By	Target Date	Expired On Date	Registration Date	Mandatory <input type="checkbox"/>	Actions
PY2021 AB Marketplace Training – Individual Marketplace (IM)	Granted	N/A	Acquired	fname Iname	09/30/2019	06/20/2018		<input type="checkbox"/>	<a href="#">Actions</a>

**Actions**  
View Curriculum History  
View Course History  
Print Certificate

# Step 7: Agent or Broker Confirms 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) that you are affiliated with may request to view your Registration Completion Certificate(s). However, issuers are instructed to review the [Agent and Broker FFM Registration Completion List](#) (RCL) to confirm the registration status of agents and brokers.

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

- You should also confirm that your information appears on the [RCL](#).
- Your information may take one to two business days to appear on the RCL after completing all registration and training steps. It may take up to three business days to appear on Find Local Help.
- If your NPN does not appear for plan year 2021, go to the [Marketplace Registration Tracker](#) to check your Marketplace registration status.
  - Enter your NPN and ZIP code.
  - Information is updated once daily by 5:00 PM ET.
- If you still need assistance, send an email to: [FFMProducer-AssisterHelpDesk@cms.hhs.gov](mailto:FFMProducer-AssisterHelpDesk@cms.hhs.gov).

AGENT AND BROKER  
MARKETPLACE  
REGISTRATION TRACKER

Current Plan Year Registration Status Lookup Tool

The Agent and Broker Registration Tracker is a searchable database that allows you to look up your Marketplace registration status with the National Producer Number (NPN) and ZIP Code that you have saved in your Marketplace Learning Management System (MLMS) profile for the current plan year.

Find Your Status

Enter both NPN and ZIP code to look up your status.

NPN  
NPN (numbers only)

ZIP Code  
ZIP Code (5 digit only)

View Status

Data last updated on: 8/27/2018

About the Tool Other Resources

Resources for Agents and Brokers

- Registration Completion List (updated daily)
- Registration Termination List
- Plan Year 2019 Registration and Training Instructions
- New Agents and Brokers Quick Guide
- Returning Agents and Brokers Quick Guide
- Start Training by logging into the CMS Portal

If you have questions or need assistance, contact the Marketplace Service Desk (MSD) at 1-855-207-1515 or CMS\_FEPS@cms.hhs.gov.



# Plan Year 2021 Health Insurance Marketplace<sup>®</sup> Registration and Training for New Agents and Brokers



*Help Desk and Call  
Center Support*

# Agent/Broker Marketplace Help Desks and Call Centers

Name	Phone # and/or Email Address	Types of Inquiries Handled	Hours (Closed Holidays)
Agent/Broker Email Help Desk	<a href="mailto:FFMProducer-AssisterHelpDesk@cms.hhs.gov">FFMProducer-AssisterHelpDesk@cms.hhs.gov</a>	<ul style="list-style-type: none"> <li>• General enrollment and compensation questions</li> <li>• Manual identity proofing/Experian issues</li> <li>• Escalated registration and training questions (not related to a specific training platform)</li> <li>• Agent/Broker Registration Completion List issues</li> <li>• Find Local Help listing issues</li> <li>• Help On Demand participation instructions or questions</li> <li>• Report concerns that a consumer or another agent or broker has engaged in fraud or abusive conduct</li> </ul>	Monday-Friday 8:00 AM–6:00 PM ET
Marketplace Service Desk	855-CMS-1515 855-267-1515 <a href="mailto:CMS_FEPS@cms.hhs.gov">CMS_FEPS@cms.hhs.gov</a>	<ul style="list-style-type: none"> <li>• CMS Enterprise Portal password resets and account lockouts</li> <li>• Other CMS Enterprise Portal account issues or error messages</li> <li>• General registration and training questions (not related to a specific training platform)</li> <li>• Login issues on the Classic Direct Enrollment agent/broker landing page</li> <li>• Technical or system-specific issues related to the Marketplace Learning Management System (MLMS)</li> <li>• User-specific questions about maneuvering in the MLMS site, or accessing training and exams</li> </ul>	Monday-Friday 8:00 AM–8:00 PM ET
Marketplace Call Center Agent/Broker Partner Line	855-788-6275 Note: Enter your NPN to access this line. TTY users 1-855-889-4325	Specific consumer application questions related to: <ul style="list-style-type: none"> <li>• Password reset for a consumer HealthCare.gov account,</li> <li>• Special enrollment period not available on the consumer application, or</li> <li>• Consumer specific eligibility and enrollment questions</li> </ul>	Monday-Sunday 24 hours/day

# Agent/Broker Marketplace Help Desks and Call Centers (Continued)

Help Desk Name	Phone # and/or Email Address	Types of Inquiries Handled	Hours of Operation (Closed Holidays)
Agent/Broker Training and Registration Email Help Desk	<a href="mailto:MLMSHelpDesk@cms.hhs.gov">MLMSHelpDesk@cms.hhs.gov</a>	<ul style="list-style-type: none"> <li>• Technical or system-specific issues related to the MLMS</li> <li>• User-specific questions about maneuvering in the MLMS site, or accessing training and exams</li> </ul>	Monday-Friday 9:00 AM–5:30 PM ET
SHOP Call Center	800-706-7893	<ul style="list-style-type: none"> <li>• Inquiries related to SHOP eligibility determinations on HealthCare.gov</li> <li>• Contact the insurance company for most questions about SHOP plans, such as applications, enrollment, renewal, or changing or updating coverage.</li> </ul>	Monday-Sunday 24 hours/day
Marketplace Appeals Center	1-855-231-1751 TTY users 1-855-739-2231	<ul style="list-style-type: none"> <li>• Status of a Marketplace eligibility appeal</li> <li>• How to appoint an Authorized Representative to request Marketplace eligibility appeal on a consumer's behalf</li> </ul>	Monday-Friday 7:00 AM–8:30 PM ET
America's Health Insurance Plans (AHIP) Training Help Desk	<a href="mailto:support@ahipinsuranceeducation.org">support@ahipinsuranceeducation.org</a>  800-509-4422	<ul style="list-style-type: none"> <li>• All inquiries specifically related to the AHIP agent/broker training platform</li> </ul>	Monday-Friday 8:00 AM–7:00 PM ET  Saturday 8:30 AM–5:00 PM ET

# Support Available for Complex Consumer Cases

- Consumer-specific complex cases are cases where a consumer has submitted an eligibility application and/or enrollment for coverage and requires assistance in making a change.
- In this situation, you must first attempt to resolve the case by contacting the Marketplace Consumer Call Center or the applicable Enhanced Direct Enrollment (EDE) partner.
- If you are unsuccessful in resolving the case with the Call Center or EDE partner and still require assistance, contact the FFM Agent/Broker Email Help Desk ([FFMProducer-AssisterHelpDesk@cms.hhs.gov](mailto:FFMProducer-AssisterHelpDesk@cms.hhs.gov)) and provide the following information:
  - Full name, email address, and phone number of the agent or broker assisting the consumer
  - The consumer's Marketplace application ID
  - The state in which the consumer resides
  - Summary of the case and what you are requesting
  - Whether the case is medically urgent (and if so, when a response is needed)
  - Indicate that you have already called the Marketplace Call Center or EDE partner and provide the date of the call
- The Help Desk will refer the information you provide to representatives from our Complex Case Help Center (CCHC) so they can respond to your issue. A member of the CCHC team will contact you via phone for additional information or to communicate the outcome of the case.

# Plan Year 2021 Health Insurance Marketplace<sup>®</sup> Registration and Training for New Agents and Brokers



*Agent and Broker  
Resources*

# Agent and Broker Resources

Resource	Description	Link
Frequently Asked Questions for Agents and Brokers	Provides answers to commonly asked questions about working with the Marketplace and helping clients enroll in and maintain their coverage	<a href="https://www.agentbrokerfaq.cms.gov/s/">https://www.agentbrokerfaq.cms.gov/s/</a>
Agent and Broker FFM Registration Completion List (RCL)	Public list of agents and brokers who have completed Marketplace registration; used by issuers to verify your eligibility for compensation for assisting with Marketplace consumer enrollments	<a href="https://data.healthcare.gov/ffm_ab_registration_lists">https://data.healthcare.gov/ffm_ab_registration_lists</a>
Agent and Broker Marketplace Registration Tracker	Searchable database that allows users to look up their Marketplace registration status with the NPN and ZIP Code saved in their MLMS profile for the current plan year	<a href="https://data.healthcare.gov/ab-registration-tracker/">https://data.healthcare.gov/ab-registration-tracker/</a>
Find Local Help	Tool available on HealthCare.gov that enables consumers to search for a local, Marketplace-registered agent or broker to assist with Marketplace enrollment	<a href="https://localhelp.healthcare.gov/">https://localhelp.healthcare.gov/</a>
Help On Demand	Consumer assistance referral system operated by Help On Demand (formerly known as BigWave Systems) that connects consumers seeking assistance with Marketplace-registered, state-licensed agents and brokers in their area who can provide immediate assistance with Marketplace plans and enrollments	<a href="https://www.cms.gov/CCIIO/Programs-and-Initiatives/Health-Insurance-Marketplaces/Downloads/Help-On-Demand.pdf">https://www.cms.gov/CCIIO/Programs-and-Initiatives/Health-Insurance-Marketplaces/Downloads/Help-On-Demand.pdf</a>

# Agent and Broker Resources (Continued)

Resource	Description	Link
Agent and Broker NPN Search Tool	Enables users to search and find the correct NPN to enter in your MLMS profile and on Marketplace applications	<a href="http://www.nipr.com/PacNpnSearch.htm">www.nipr.com/PacNpnSearch.htm</a>
List of Approved Health-related Lines of Authority	Provides a list of valid health-related lines of authority for agents and brokers	<a href="https://data.healthcare.gov/dataset/NIPR-Valid-Lines-of-Authority-List/wk5a-kdpd/data">https://data.healthcare.gov/dataset/NIPR-Valid-Lines-of-Authority-List/wk5a-kdpd/data</a>
CMS Enterprise Portal	Allows you to securely complete identity proofing and access the MLMS to complete annual, required Marketplace agent and broker training and registration	<a href="https://portal.cms.gov">https://portal.cms.gov</a>
Partner Directory for Agents and Brokers	List of approved, participating issuers and web-brokers includes entities that offer online resources for agents and brokers, such as enrollment and client management functionality	<a href="https://data.healthcare.gov/issuer-partner-lookup">https://data.healthcare.gov/issuer-partner-lookup</a>
LinkedIn® for Marketplace Agents and Brokers	Contains posts with announcements, new resources, upcoming webinars, and more information for Marketplace agents and brokers	<a href="https://www.linkedin.com/showcase/cms-ab">https://www.linkedin.com/showcase/cms-ab</a>
Assisting Clients with Marketplace Eligibility Appeals	Reviews the Marketplace eligibility appeal process and describes consumers' rights to appeal a Marketplace eligibility determination	<a href="http://cbt.regtap.info/cbt/regtap/AB_MarketplaceEligibilityAppeals_CBT_5CR_061119/story.html5.html">http://cbt.regtap.info/cbt/regtap/AB_MarketplaceEligibilityAppeals_CBT_5CR_061119/story.html5.html</a>

# Agent and Broker Resources (Continued)

Resource	Description	Link
Agents and Brokers Resources Webpage	Primary outlet for agents and brokers to receive information about working in the Health Insurance Marketplace; provides the latest news and resources, including newsletters, webinars, fact sheets, videos, and tip sheets	<a href="http://go.cms.gov/CCIIOAB">http://go.cms.gov/CCIIOAB</a>
HealthCare.gov	Official site of the Health Insurance Marketplace; used for researching health coverage choices, eligibility, and enrollment	<a href="https://www.healthcare.gov/">https://www.healthcare.gov/</a>
Marketplace Information	Official Marketplace information source for assisters and outreach partners about Marketplace eligibility, financial assistance, enrollment, and more	<a href="https://marketplace.cms.gov">https://marketplace.cms.gov</a>

# Acronym Definitions

Acronym	Definition
AHIP	America's Health Insurance Plans
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
HHS	Department of Health & Human Services
MLMS	Marketplace Learning Management System
NPN	National Producer Number
QHP	Qualified Health Plan
RCL	Registration Completion List
SHOP	Small Business Health Options Program

# Conclusion

