

PARTICIPATING IN THE FEDERALLY-FACILITATED MARKETPLACES

Registration Process for Agents and Brokers

September 13, 2013

**Agent/Broker
Outreach Meetings**

Agenda

- Introduction and Objectives
- Registration Overview
- Registration Process Steps
- Assisting Consumers with Eligibility Determinations and Enrollment
- Additional Resources

Session Guidelines

- This is a ninety (90) minute webinar session.
- Questions will be taken after the discussion of 'Registration Part I,' and at the end of the presentation.
- For questions regarding content or logistics, contact the REGTAP Registrar at registrar@regtap.info or (800) 257-9520.

Purpose

- To provide Agents and Brokers with program and operational guidance to encourage their participation in Individual and Small Business Health Options Program (SHOP) Marketplaces.

Introduction and Objectives

Introduction

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

- Briana Levine, Health Insurance Specialist, Issuer Oversight Branch, Exchange Policy and Operations Group

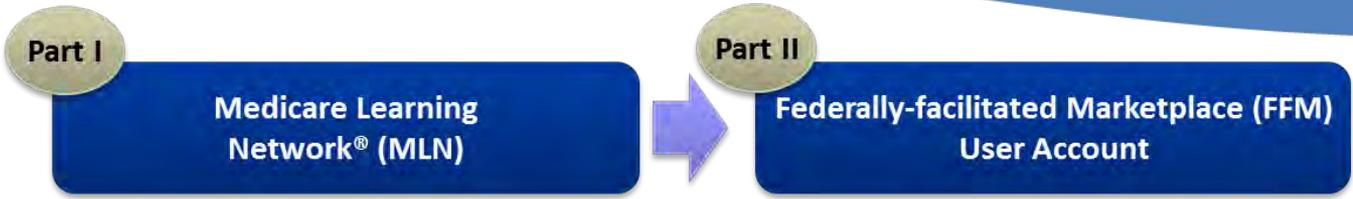
Webinar Objectives

- Present the registration process for agents and brokers, including web-brokers, wishing to assist consumers in the Federally-facilitated Marketplaces (FFM)*
- Describe the pathways for assisting consumers with eligibility determinations and enrollment in Qualified Health Plans (QHP)
- Provide resources for technical assistance and support for agents and brokers in the FFMs

* The FFM includes the Individual and the Small Business Health Options Program (SHOP) Marketplaces. This registration process also applies to agents and brokers operating in State Partnership Marketplaces.

Registration Overview

Registration Overview



Website:		Medicare Learning Network®: https://Marketplace.MedicareLearningNetworkLMS.com		CMS Enterprise Portal: https://portal.cms.gov
Key Actions:		<ul style="list-style-type: none"> ▶ Register on MLN ▶ Complete assigned training courses and pass exams ▶ Read and accept the applicable Marketplace Agreement(s) 		<ul style="list-style-type: none"> ▶ Create a User Account (FFM User ID and password) ▶ Complete identity verification through the Enterprise Identity Management (EIDM) System
Considerations:	<p>All agents and brokers in the FFM are required to register on the MLN website and electronically sign the Agreement(s) that apply to them. Training courses and exams are required for agents and brokers who wish to enroll consumers in the Individual Marketplace.</p>		<p>Required only for agents and brokers who wish to enroll consumers in the Individual Marketplace.</p>	

Summary of Registration Activities for Agents and Brokers Participating in the FFM

	Registration Activities			
	Part I			Part II
	Register on MLN	Complete the FFM Training and Testing	Execute FFM Agreement(s)*	Create an FFM User Account and Complete Identity Verification on the CMS Enterprise Portal
Agents and brokers participating in the...				
• Individual Marketplace	Required	Required: ACA Basics, IM	Required	Required
• SHOP Marketplace	Required	Recommended: ACA Basics, SHOP	Required	
• Both Individual & SHOP Marketplaces	Required	Required: ACA Basics, IM Recommended: SHOP	Required	Required

* Agents and brokers in the Individual Marketplace need to sign two agreements. Agents and brokers in the SHOP Marketplace need to sign one agreement. Agents and brokers who wish to serve both marketplaces will need to sign each of the three agreements.

COURSES:

- ACA Affordable Care Act and Marketplace Basics
- IM Individual Marketplace Course
- SHOP SHOP Marketplace Course



Considerations for Web-brokers (Individual Market)

- A senior official representing the web-broker entity must sign and submit to CMS/CCIIO a Web-broker API Agreement agreeing to comply with applicable privacy and security terms, as well as standards for connecting to the Federal Data Services Hub.
- In addition, a representative of the web-broker entity must register and complete the individual market training, exams, and the Federally-facilitated Individual Marketplace Agreements on MLN
- Individual agents or brokers who are affiliated with a web-broker will not sign a Web-broker Agreement but must complete the registration steps required for the Individual Marketplace in which he or she is participating

Registration Process Steps

Summary of the Registration Process Steps

The following section will walk through each step of the registration process. Remember that the registration process generally includes two parts.

– Part I

- Occurs on the Medicare Learning Network (MLN)®
- Covers training, exams, and signing agreement(s)
- Takes approximately 3.5 - 4 hours to complete, and depends on the specific Marketplace curriculum selected

– Part II

- Occurs on the CMS Enterprise Portal
- Covers the establishment of an FFM User Account, and completion of identify verification
- Takes approximately 30 minutes to complete
- Only required for agents and brokers serving in the individual market

Part I: Medicare Learning Network® (Step 1)

Access MLN, available at
<https://Marketplace.MedicareLearningNetworkLMS.com>

Step 1. First time users will select “Create Account.”

Each time you return to this page, you will be prompted to enter your Login ID and Password, then click on the ‘Log In’ button.

DEPARTMENT OF HEALTH & HUMAN SERVICES USA

Health Insurance Marketplace

Welcome

Enter your login information below.

Need an account? [Create Account](#)

* Login ID

[Forgot your login ID?](#)

* Password

[Forgot your password?](#)

[Log In](#)

[Contact Administrator](#)

Recent Announcements

Welcome!

CMS is pleased to launch this new webpage to support the Federally-facilitated Marketplaces. This webpage enables training for

- Agents and Brokers
- Navigators
- Certified Application Counselors
- In-person Assistance Personnel

The training curriculum for each user type has been customized to the specific needs of those users. Because our site is still new, we will add additional training curricula during the coming weeks. If the training curriculum for your user type isn't posted yet, please check back soon. We also invite you to visit www.healthcare.gov for more information about the Health Insurance Marketplaces. [Less](#)

Part I: Medicare Learning Network® (Step 1a)

Step 1a. Self-select your user name and password; enter basic identifying information, including your National Producer Number (NPN)
Select your User Type/User Role:

- Agent/Broker/Web-broker – Individual Market
- Agent/Broker/Web-broker – SHOP
- Agent/Broker/Web-broker – Individual Market and SHOP

‘Organization Type’ is automatically grayed-out, agents/brokers do not need to complete it.

‘# of Records per page’: It does not matter which number you choose from the drop-down menu.

The screenshot shows a 'Create New Account' form with the following fields and values:

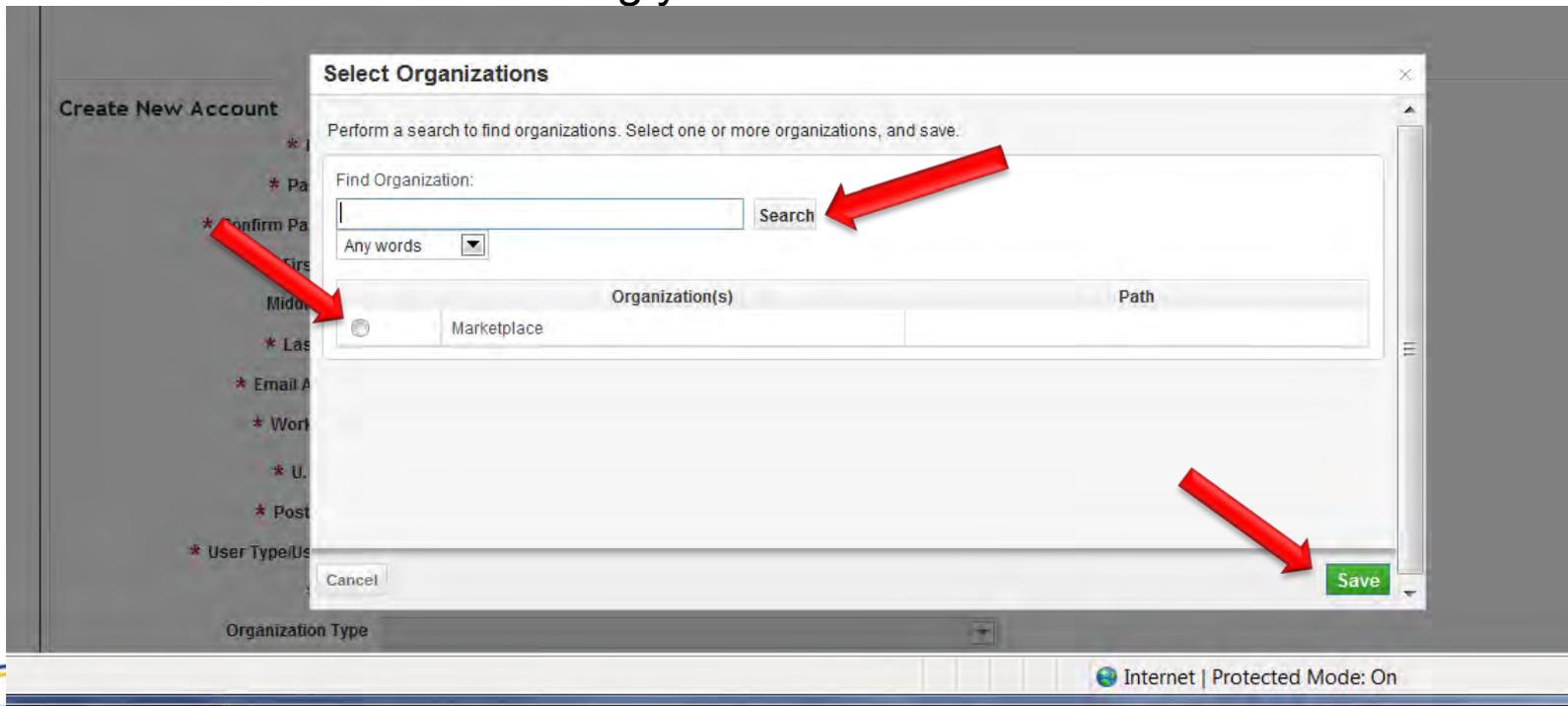
- * Login ID: [Empty]
- * Password: [Empty]
- * Confirm Password: [Empty]
- * First Name: [Empty]
- Middle Name: [Empty]
- * Last Name: [Empty]
- * Email Address: [Empty]
- * Work Phone: [Empty] Ext. [Empty]
- * U.S. State: Alabama
- * Postal Code: [Empty]
- * User Type/User Role: Agent/Broker/Web-Broker - Individual Market
- * NPN#: [Empty]
- Organization Type: [Grayed-out]
- * Organization: [Select]
- Job Title: [Select]
- Manager: [Select]
- * Primary Language: English (United States)
- * Region: English (United States)
- * Time Zone: (GMT-05:00) Eastern Time (US and Canada)
- Enable Accessibility: [Checked]
- * # of Records (per page): 10

NPN: If you do not know your NPN, you may obtain it at: <https://pdb.nipr.com/html/PacNpnSearch.html>

Part I: Medicare Learning Network®

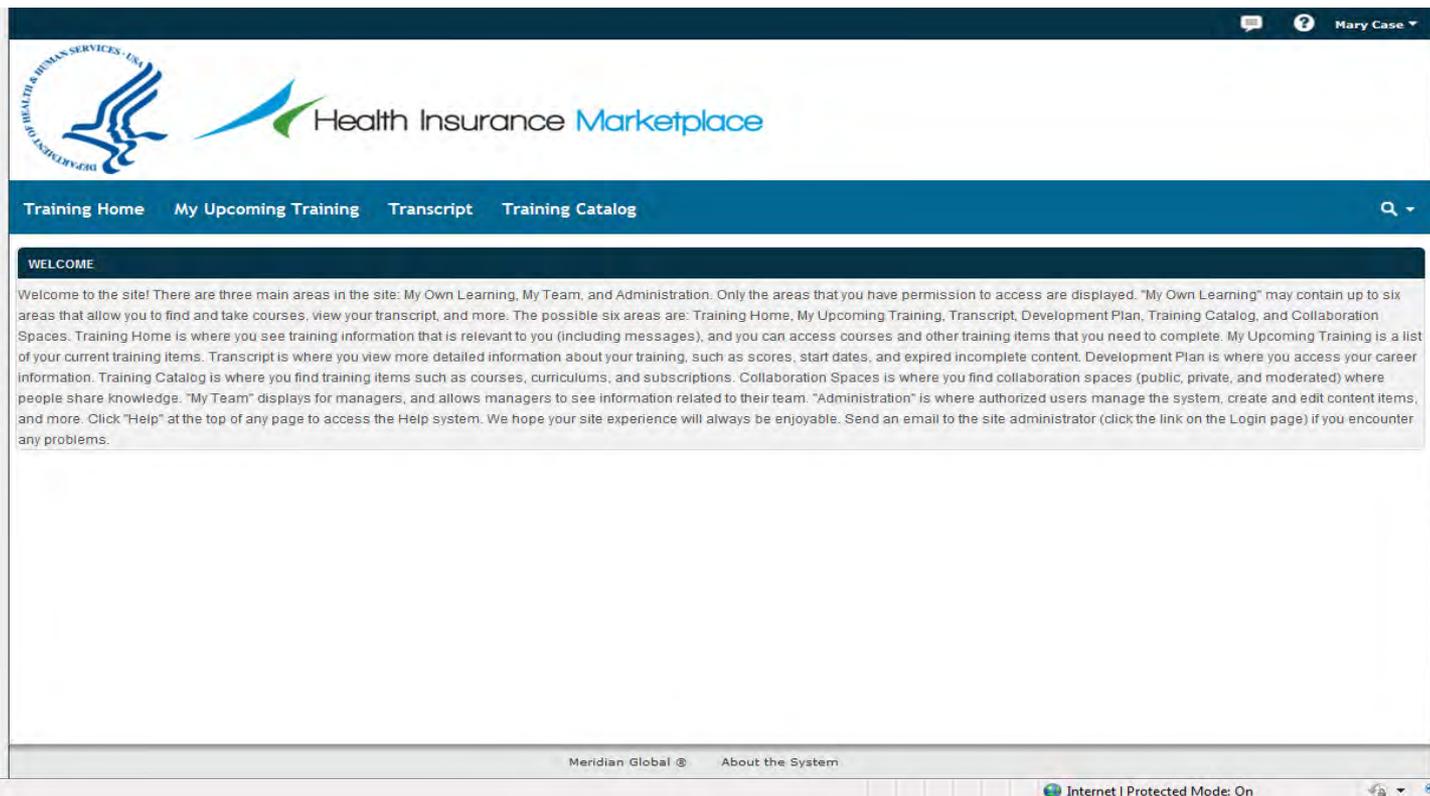
(Step 1a) (continued)

Next to the second field, 'Organization,' click on the blue text that says 'Select.' A new screen will pop up. Click the gray 'Search' button, and the Organization named 'Marketplace' will appear as the only option. Click the circle to select 'Marketplace,' then select 'Save.' You will be returned to the previous screen to finish creating your MLN account.



Part I: Medicare Learning Network® (Step 1b)

Step 1b. After you successfully create your account, you will be taken to the 'Welcome' page.



The screenshot shows the Medicare Learning Network 'Welcome' page. At the top left is the Department of Health & Human Services logo. To its right is the 'Health Insurance Marketplace' logo. Below these is a navigation bar with links: 'Training Home', 'My Upcoming Training', 'Transcript', and 'Training Catalog'. A search icon is on the right. The main content area is titled 'WELCOME' and contains a detailed message about the site's features and navigation. At the bottom of the page, there are links for 'Meridian Global' and 'About the System'. The browser's address bar shows 'Internet | Protected Mode: On'.

Part I: Medicare Learning Network® (Step 2)

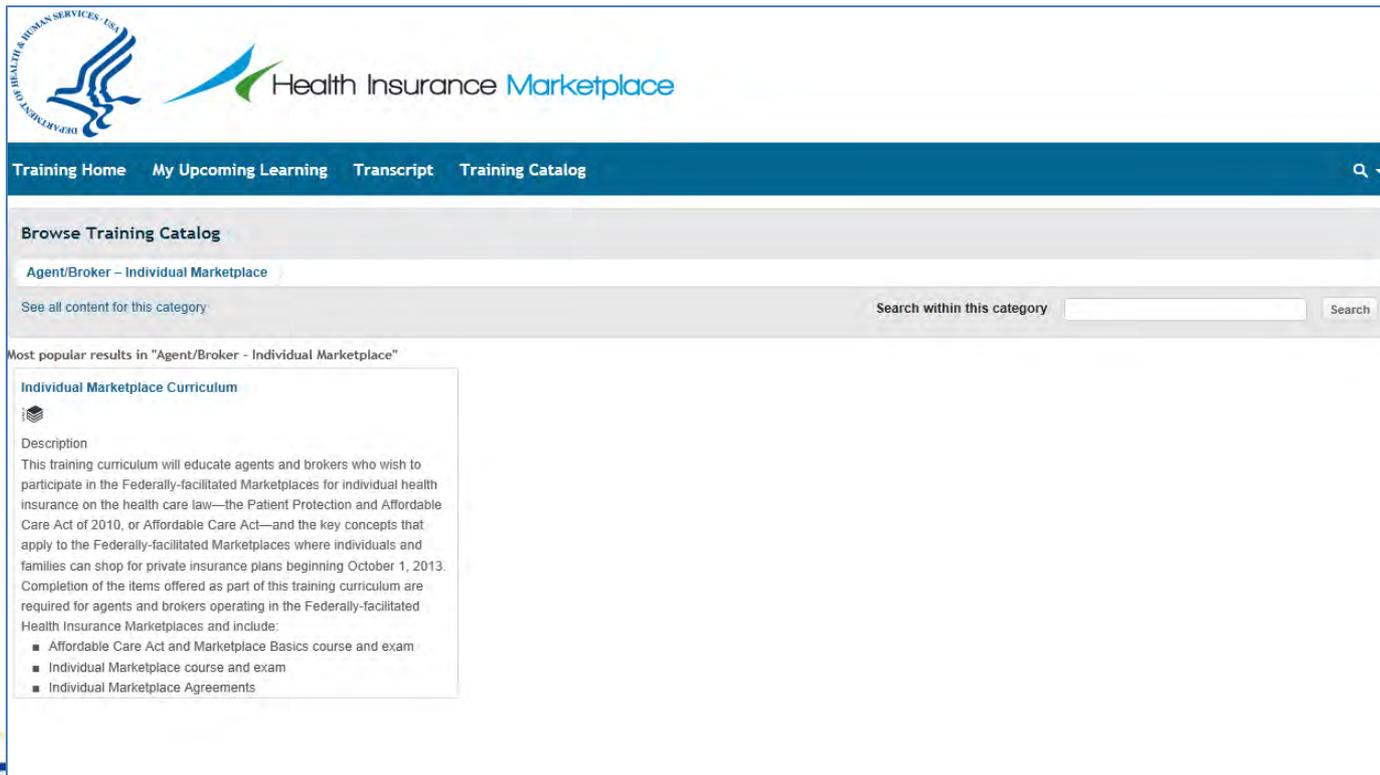
Step 2. Click on the 'Training Catalog' Tab, and click on your User Type-User Role under 'Browse by Category.'

The screenshot displays the Medicare Learning Network Training Catalog interface. At the top, there is a navigation bar with the following tabs: Training Home, My Upcoming Learning, Transcript, and Training Catalog. A red arrow points to the 'Training Catalog' tab. Below the navigation bar, the page is titled 'Browse Training Catalog'. There is a search section with a 'Search for:' input field, a dropdown menu set to 'Any words', and a 'Search' button. Below the search section is a 'Browse by Category' section with a list of user roles and their counts:

Browse by Category		
Agent/Broker – Individual & SHOP Marketplace (1)	Agent/Broker – Individual Marketplace (1)	Agent/Broker – SHOP Marketplace (1)
Certified Application Counselor (1)	In-Person Assistance Personnel (1)	Navigator (1)

Part I: Medicare Learning Network® (Step 3)

Step 3. After you click on the underlined User Type-User Role in the 'Browse by Category' section, the curriculum description opens. Click on the title of the curriculum.



The screenshot displays the Medicare Learning Network website interface. At the top left is the Department of Health & Human Services USA logo, and to its right is the Health Insurance Marketplace logo. Below these is a navigation bar with links: Training Home, My Upcoming Learning, Transcript, and Training Catalog. A search icon is on the right. The main content area is titled 'Browse Training Catalog' and features a dropdown menu currently set to 'Agent/Broker - Individual Marketplace'. Below the dropdown is a search bar with the text 'See all content for this category' and 'Search within this category'. The results section is titled 'Most popular results in "Agent/Broker - Individual Marketplace"' and lists a single result: 'Individual Marketplace Curriculum'. A red arrow points to this title. The curriculum description includes a brief overview and a bulleted list of topics: Affordable Care Act and Marketplace Basics course and exam, Individual Marketplace course and exam, and Individual Marketplace Agreements.

Part I: Medicare Learning Network® (Step 4)

Step 4 . The curriculum window will open, showing you all of the courses in that curriculum. Click the green 'Enroll' button to enroll in the curriculum.

Browse Training Catalog



 Curriculum

 Curriculum Code:

[Item Details](#)

Individual Marketplace Curriculum

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

Enroll
★★★★★

Description:

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

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

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

⊕ **Required Training Due**

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

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

Required

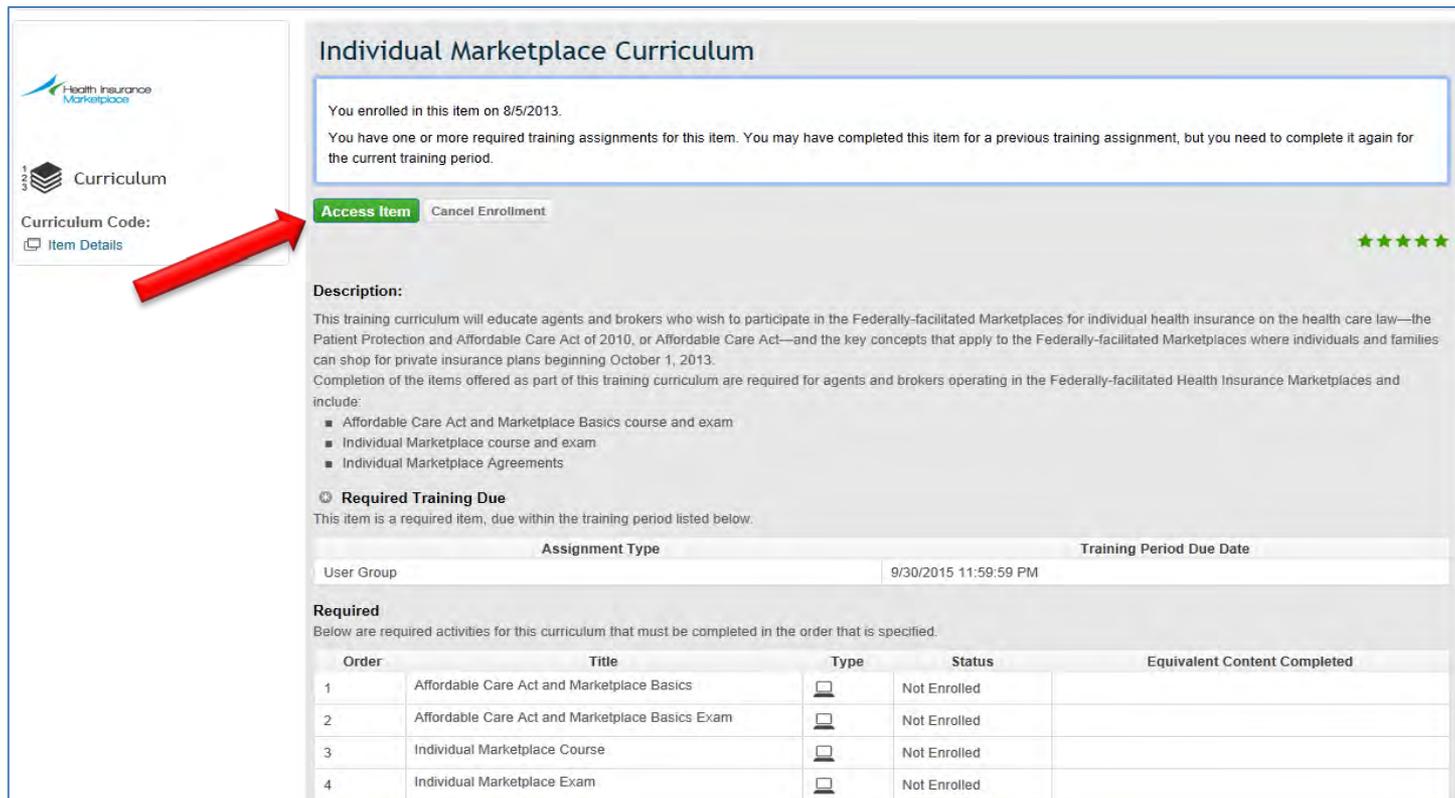
Below are required activities for this curriculum that must be completed in the order that is specified.

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

Below are required activities for this curriculum. They can be completed in any order.

Part I: Medicare Learning Network® (Step 5)

Step 5 . Click on the green 'Access Item' to access the curriculum content.



The screenshot shows the Medicare Learning Network interface. On the left, there is a navigation menu with 'Curriculum' selected. The main content area is titled 'Individual Marketplace Curriculum'. It includes a text box stating: 'You enrolled in this item on 8/5/2013. You have one or more required training assignments for this item. You may have completed this item for a previous training assignment, but you need to complete it again for the current training period.' Below this text are two buttons: 'Access Item' (highlighted in green) and 'Cancel Enrollment'. A red arrow points to the 'Access Item' button. To the right of the buttons are five green stars. Below the buttons is a 'Description' section, followed by a 'Required Training Due' section with a table of training assignments. At the bottom, there is a 'Required' section with a table of activities.

Individual Marketplace Curriculum

You enrolled in this item on 8/5/2013.
You have one or more required training assignments for this item. You may have completed this item for a previous training assignment, but you need to complete it again for the current training period.

[Access Item](#) [Cancel Enrollment](#) ★★★★★

Description:
This training curriculum will educate agents and brokers who wish to participate in the Federally-facilitated Marketplaces for individual health insurance on the health care law—the Patient Protection and Affordable Care Act of 2010, or Affordable Care Act—and the key concepts that apply to the Federally-facilitated Marketplaces where individuals and families can shop for private insurance plans beginning October 1, 2013. Completion of the items offered as part of this training curriculum are required for agents and brokers operating in the Federally-facilitated Health Insurance Marketplaces and include:

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

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

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

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

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

Part I: Medicare Learning Network® (Step 6)

Step 6 . Click the title of the first course.



 Curriculum

 Curriculum Code:

[Item Details](#)

Individual Marketplace Curriculum

You first accessed this item on 8/5/2013. [View Details](#)

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

Rating: ★★★★★ Rate

Description:

This training curriculum will educate agents and brokers who wish to participate in the Federally-facilitated Marketplaces for individual health insurance on the health care law—the Patient Protection and Affordable Care Act of 2010, or Affordable Care Act—and the key concepts that apply to the Federally-facilitated Marketplaces where individuals and families can shop for private insurance plans beginning October 1, 2013. Completion of the items offered as part of this training curriculum are required for agents and brokers operating in the Federally-facilitated Health Insurance Marketplaces and include:

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

Required Training Due

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

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

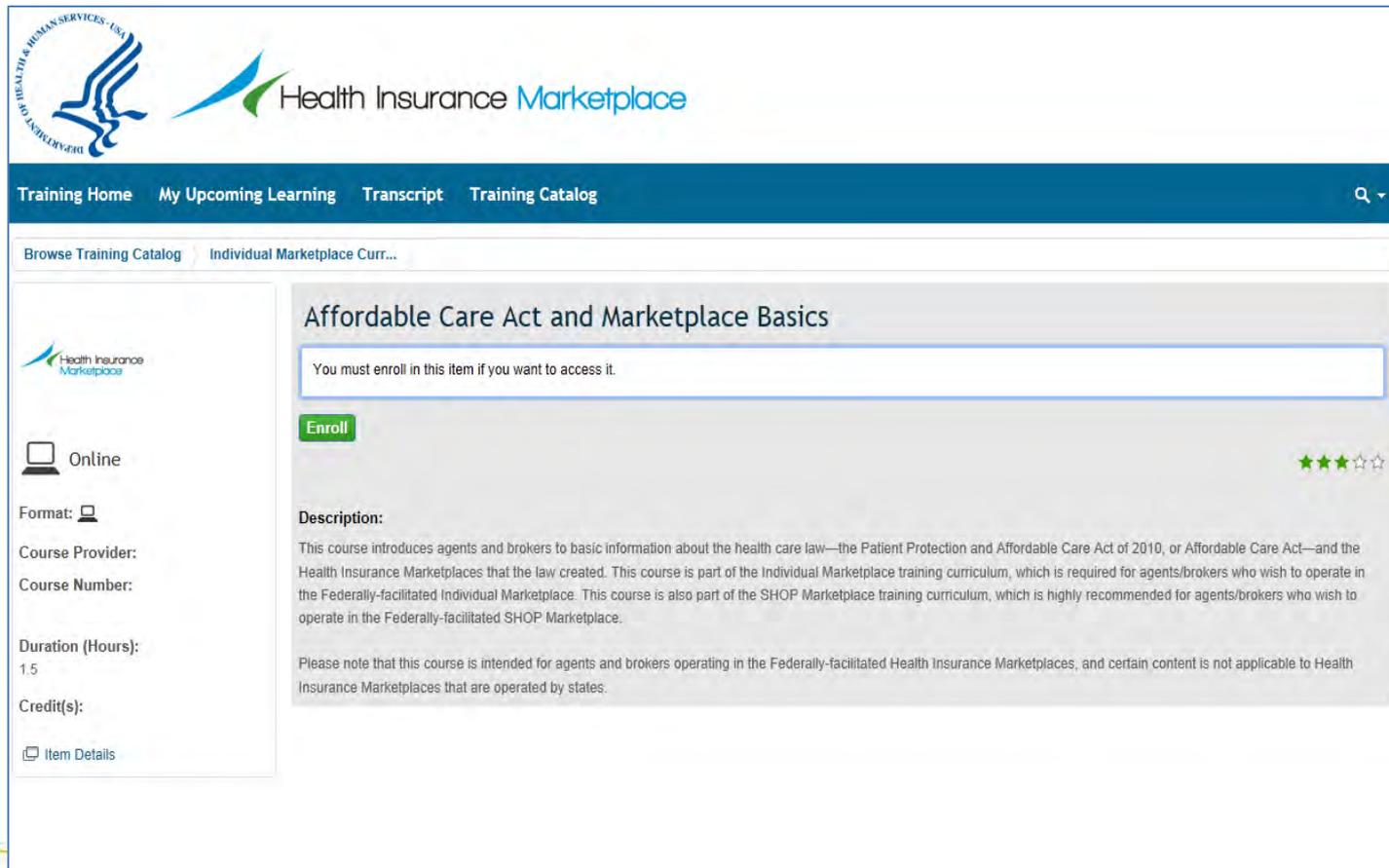
Required

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

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

Part I: Medicare Learning Network® (Step 7)

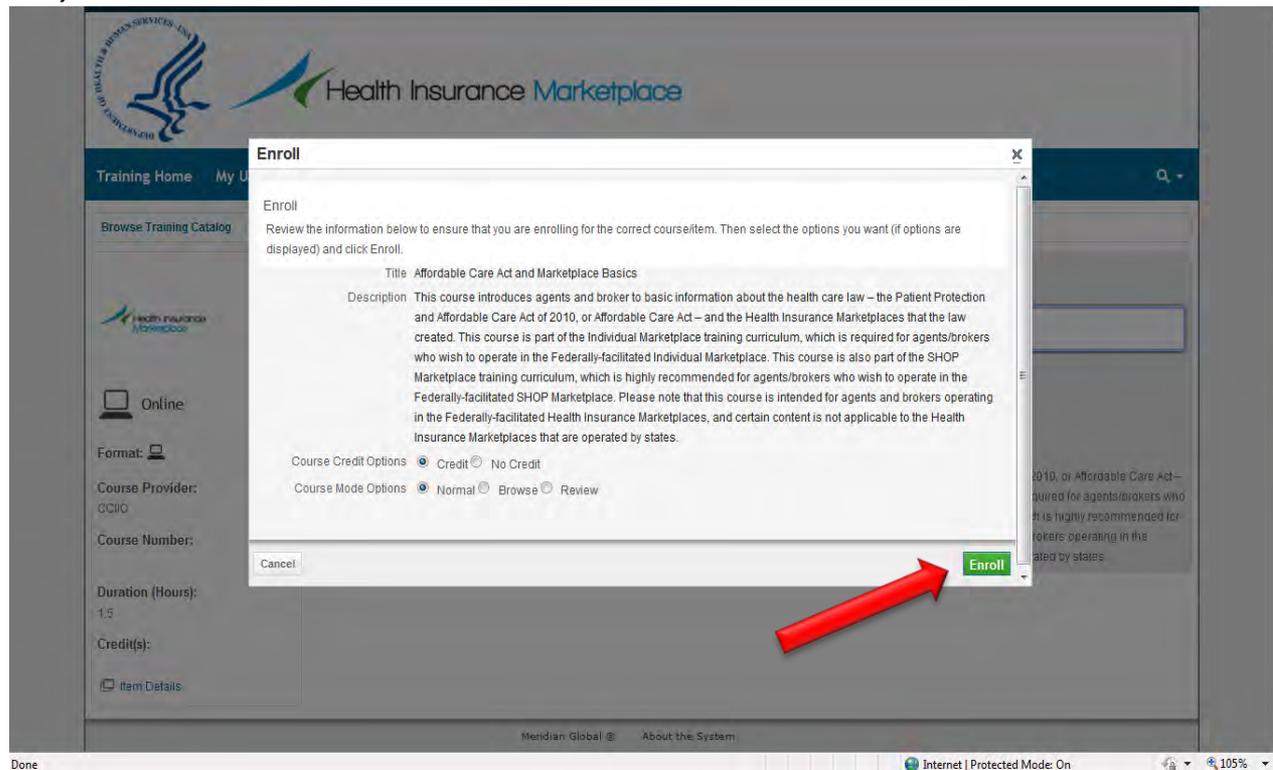
Step 7. Click the green 'Enroll' button.



The screenshot shows the Medicare Learning Network website interface. At the top left is the Department of Health & Human Services logo. The main header features the Health Insurance Marketplace logo. A dark blue navigation bar contains links for 'Training Home', 'My Upcoming Learning', 'Transcript', and 'Training Catalog', along with a search icon. Below the navigation bar, there are tabs for 'Browse Training Catalog' and 'Individual Marketplace Curr...'. The main content area is titled 'Affordable Care Act and Marketplace Basics'. A message box states 'You must enroll in this item if you want to access it.' Below this is a prominent green 'Enroll' button. To the right of the button is a 4-star rating. A 'Description:' section follows, providing details about the course's content and its relevance to the Individual Marketplace and SHOP Marketplace training curricula. A sidebar on the left contains filters for 'Online' format, 'Course Provider', 'Course Number', 'Duration (Hours): 1.5', and 'Credit(s)'. An 'Item Details' link is also present in the sidebar.

Part I: Medicare Learning Network® (Step 8)

Step 8. A new window will open. Click the green 'Enroll' button. (You may keep the defaults that are already in place for 'Course Credit Options' and 'Course Mode Options'.)



Part I: Medicare Learning Network® (Step 9)

Step 9. Click the green 'Open Item' button.

The screenshot displays the Medicare Learning Network interface. At the top left is the Department of Health & Human Services logo. The main header includes 'Health Insurance Marketplace' and navigation links: 'Training Home', 'My Upcoming Learning', 'Transcript', and 'Training Catalog'. Below the header, there are tabs for 'Browse Training Catalog' and 'Individual Marketplace Curr...'. The main content area is titled 'Affordable Care Act and Marketplace Basics'. It features a text box stating 'You enrolled in this item on 8/5/2013.' with a 'Cancel Enrollment' button. A prominent green 'Open Item' button is visible, with a red arrow pointing to it from the left sidebar. The sidebar contains filters for 'Online' (with a computer icon), 'Format: [icon]', 'Course Provider:', 'Course Number:', 'Duration (Hours): 1.5', and 'Credit(s):'. A 'Item Details' link is at the bottom of the sidebar. The course description below the 'Open Item' button reads: 'This course introduces agents and brokers to basic information about the health care law—the Patient Protection and Affordable Care Act of 2010, or Affordable Care Act—and the Health Insurance Marketplaces that the law created. This course is part of the Individual Marketplace training curriculum, which is required for agents/brokers who wish to operate in the Federally-facilitated Individual Marketplace. This course is also part of the SHOP Marketplace training curriculum, which is highly recommended for agents/brokers who wish to operate in the Federally-facilitated SHOP Marketplace. Please note that this course is intended for agents and brokers operating in the Federally-facilitated Health Insurance Marketplaces, and certain content is not applicable to Health Insurance Marketplaces that are operated by states.'

Part I: Medicare Learning Network® (Step 10)

Step 10. Proceed with taking the course.

The screenshot shows a Windows Internet Explorer browser window. The address bar displays the URL: <http://marketplace.medicarelearningnetworkms.com/Kview/CustomCodeBehind/base/courseware/scorm/scorm12courseframe.aspx>. The page title is "Affordable Care Act and Marketplace Basics". The main content area has a light blue background with the text "WELCOME TO THE AFFORDABLE CARE ACT AND MARKETPLACE BASICS COURSE". Below this text are two logos: the Department of Health & Human Services logo and the Health Insurance Marketplace logo. At the bottom of the page, there is a CMS logo and several navigation buttons: "Menu", "Help", "Glossary", "Resources", "BACK", and "NEXT".

Part I: Menu Displays Within Courses

The menu page displays the topics in each course.

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

The screenshot shows a web browser window displaying the course menu for 'Affordable Care Act and Marketplace Basics'. The page title is 'Affordable Care Act and Marketplace Basics'. The main content area is titled 'Main Menu' and contains the following text: 'Click on any of the topics below to view that topic. Please note that each topic link will take you to the first page of that topic. If you return to the menu, you will then need to navigate back to the page you were viewing.' Below this, a legend explains the status of each topic: 'A circle before each topic title below indicates if you have completed it, partially completed it, or have not started it: a fully dark-colored circle, a half light- and half dark-colored circle, and a fully light-colored circle, respectively.' The list of topics includes: 'Introduction to the Course', 'Affordable Care Act and Marketplace Basics', 'Rate Review and Rating Variations', 'Overview of Individual and Small Business Health Options Program Marketplaces', 'Operating in the Federally-facilitated Marketplaces', 'Privacy Standards and Issues', and 'Information Security'. The 'Affordable Care Act and Marketplace Basics' link is highlighted with a dark circle. At the bottom of the page, there are navigation buttons for 'Menu', 'Help', 'Glossary', and 'Resources'. The CMS logo is visible in the bottom left corner of the page. The browser's status bar at the bottom shows 'Internet | Protected Mode: On' and a zoom level of 75%.

Part I: Curriculum Contents by Role

Depending on the role you select, you will be prompted to complete the following:

Individual Marketplace Role

- Take the 'Affordable Care Act and Marketplace Basics' course and pass the exam (*required*)
- Take the 'Individual Marketplace' course and pass the exam (*required*)
- Read and accept the Individual Marketplace Agreements (*required*)

SHOP Marketplace Role

- Take the 'Affordable Care Act and Marketplace Basics' course and pass the exam (*highly recommended*)
- Take the 'SHOP' course and pass the exam (*highly recommended*)
- Read and accept the SHOP Marketplace Agreement (*required*)

Individual and SHOP Marketplace Role

- Take the 'Affordable Care Act and Marketplace Basics' course and pass the exam (*required*)
- Take the 'Individual Marketplace' course and pass the exam (*required*)
- Take the 'SHOP' course and pass the exam (*highly recommended*)
- Read and accept the Individual Marketplace Agreements (*required*)
- Read and accept the SHOP Marketplace Agreement (*required*)

Part I: Course Summaries

Course	Description	Audience	Estimated Time to Complete Course
Affordable Care Act and Marketplace Basics	Agents and brokers will learn basic information about the health care law—the Patient Protection and Affordable Care Act of 2010, or Affordable Care Act—and the Health Insurance Marketplaces that the law created.	A prerequisite course available to agents and brokers who wish to operate in either the FFM Individual and/or SHOP Marketplaces. Required for agents and brokers who wish to operate in a Federally-facilitated Individual Marketplace	1.5 hours + .5 hours for exam = 2 hours
Individual Marketplace	Agents and brokers will learn more about the Affordable Care Act and the new Individual Marketplaces where individuals and families can shop for private insurance plans.	Required for agents and brokers who wish to operate in a Federally-facilitated Individual Marketplace	1 hour + .5 hours for exam = 1.5 hours
SHOP Marketplace	Agents and brokers will learn more about the Affordable Care Act's advantages for small businesses and the new SHOP Marketplaces.	Available to agents and brokers who wish to operate in a Federally-facilitated SHOP Marketplace	1 hour + .5 hours for exam = 1.5 hours

Note: Agents and brokers serving the SHOP Marketplace are strongly encouraged, but not required, to take the Affordable Care Act and Marketplace Basics and SHOP Marketplace courses and the corresponding exams

Part I: Training Display on MLN Site

When you return to 'Training Home' after logging out, you will see the courses, exams, and Agreements you have started, as well as those you have completed.

RECENT ANNOUNCEMENTS

Welcome! 7/2/2013
 CMS is pleased to launch this new webpage to support the Federally-facilitated Marketplaces. This webpage enables training for Agents and Brokers Navigators Certified Application Counselors In-pers...
[More... >>](#)

My Upcoming Training (4) All ▾

Title	Type	Date	Status	Action
Small Business Health Options Program (SHOP) Marketplace	Curriculum		Started	
Affordable Care Act and Marketplace Basics	SCORM 1.2		Started	Open Item
SHOP Marketplace Exam	SCORM 1.2		Started	Open Item
Agent/Broker/Web-Broker - Individual Marketplace and SHOP Curriculum	Curriculum		Started	

[All My Upcoming Training](#)
 Ⓢ Required Training
 Ⓡ Overdue
 Ⓟ Due Soon
 Ⓜ Recurring Assignment

My Completed Training (1)

My Curriculums [View Details](#)
 Completed: 0 Started: 2

SEARCH

BROWSE CATEGORIES

- Agent/Broker – Individual Marketplace (0)
- Agent/Broker – Individual Marketplace an... (1)**
- Agent/Broker – SHOP Marketplace (1)
- Certified Application Counselor (0)
- In-person Assistance Personnel (0)
- Navigator (0)



Part I: Bookmarking

Training may be completed in multiple sessions. From the 'Training Home' page, click 'Open Item' next to the title of the course you wish to resume. A dialogue box will ask if you want to resume where you left off previously. Click 'OK.'

DEPARTMENT OF HEALTH & HUMAN SERVICES - USA

Health Insurance Marketplace

Training Home My Upcoming Training Transcript Training Catalog

RECENT ANNOUNCEMENTS

Welcome! 7/2/2013
CMS is pleased to launch this new webpage to support the Federally-facilitated Marketplaces. This webpage enables training for Agents and Brokers Navigators Certified Application Counselors In-pers...
More... >>

My Upcoming Training (4) All

Title	Type	Date	Status	Action
Small Business Health Options Program (SHOP) Marketplace	Curriculum		Started	
Affordable Care Act and Marketplace Basics	SCORM 1.2		Started	Open Item
SHOP Marketplace Exam	SCORM 1.2		Started	Open Item
Agent/Broker/Web-Broker - Individual Marketplace and SHOP Curriculum	Curriculum		Started	

All My Upcoming Training Required Training Overdue Due Soon Recurring Assignment

My Curriculums View Details
Completed: 0 Started: 2

SEARCH
Any words

BROWSE CATEGORIES

- Agent/Broker - Individual Marketplace (0)
- Agent/Broker - Individual Marketplace an... (1)
- Agent/Broker - SHOP Marketplace (1)
- Certified Application Counselor (0)
- In-person Assistance Personnel (0)
- Navigator (0)

My Completed Training (1)

CMS CENTERS FOR MEDICARE & MEDICAID SERVICES

Part I: Summary of Agreements

Agreement	Description	Audience
<p>Federally-facilitated Individual Marketplace Agreements</p>	<ul style="list-style-type: none"> • General Agreement for FFM Individual Market includes terms for complying with federal and state laws, rules, standards, and policies. • Privacy/security Agreement for FFM Individual Market includes privacy and security policies protecting consumers' personally identifiable information (PII). The FFM privacy standards are consistent with the seven principles outlined in 45 CFR 155.260. 	<p>Agents and brokers who wish to operate in a Federally-facilitated Individual Marketplace must read and accept the terms.</p>
<p>Federally-facilitated SHOP Marketplace Agreement</p>	<p>Includes privacy and security policies protecting consumers' personally identifiable information (PII). The FFM privacy standards are consistent with the seven principles outlined in 45 CFR 155.260.</p>	<p>Required for agents and brokers who wish to operate in a Federally-facilitated SHOP Marketplace must read and accept the terms</p>

Part I: Training Certificates

Upon successfully completing all applicable exams and Agreements, you will receive a training completion certificate.

- You will receive a certificate for each curriculum you complete
- Keep these certificates for your records
- You will need to provide copies to any issuers and web-brokers with which you are affiliated

Curriculum	Components
Individual Marketplace Curriculum	<ul style="list-style-type: none"> • Affordable Care Act and Marketplace Basics Exam • Individual Marketplace Exam • FFM Agreements for Individual Marketplace
SHOP Marketplace Curriculum	<ul style="list-style-type: none"> • Affordable Care Act and Marketplace Basics Exam (if completed) • SHOP Marketplace Exam (if completed) • SHOP Marketplace Agreement
Individual Marketplace and SHOP Marketplace Curriculum	<ul style="list-style-type: none"> • Affordable Care Act and Marketplace Basics Exam • Individual Marketplace Exam • SHOP Marketplace Exam (if completed) • FFM Agreements for Individual Marketplace • SHOP Marketplace Agreement



Questions?

To submit questions by webinar:

- *type your question in the text box under the 'Q&A' tab*

Part II: FFM User Account (Step 1)

Step 1. Access the CMS Enterprise Portal, available at: <https://portal.cms.gov> and select 'New User Registration.'*

The screenshot shows the CMS.gov Enterprise Portal homepage. The header includes the CMS.gov logo, 'Enterprise Portal', and navigation links like 'Home', 'About CMS', 'Newsroom', 'Archives', 'Help & FAQs', 'Email', and 'Print'. Below the header, there are tabs for 'Health Care Quality Improvement System' and 'Provider Resources'. The main content area features a large banner with the text 'Welcome to CMS Enterprise Portal' and a description of the portal's purpose. Below the banner are three tabs: 'CMS Enterprise Portal', 'MedicaidCHIP', and 'Medicare Shared Savings Program'. The main heading reads 'CMS Provides Health Coverage for 100 Million People...' followed by a paragraph and a button labeled 'Learn more about how CMS is implementing the Affordable Care Act'. On the right side, there is a 'CMS Secure Portal' section with a 'Login to CMS Secure Portal' button and links for 'Forgot User ID?', 'Forgot Password?', and 'New User Registration'. A red arrow points to the 'New User Registration' link. Below this is a 'CMS News' section with several news items.

* Note: To allow time for your training results from the MLN website to be transmitted to the CMS Enterprise Portal, you must generally wait at least two business days after completing your training, exams, and Marketplace Agreement(s) on the MLN website.

Part II: FFM User Account (Step 2)

Step 2. Read the terms and conditions, then check the box next to 'I agree to the terms and conditions.'

Click 'Next.'

The screenshot shows the CMS.gov Enterprise Portal registration page. At the top, it says 'CMS.gov | Enterprise Portal' and 'Centers for Medicare & Medicaid Services'. Below this are two yellow buttons: 'Health Care Quality Improvement System' and 'Provider Resources'. The main heading is 'CMS Portal > Registration'. The 'Terms and Conditions' section is highlighted in blue. It includes links for 'Consent To Monitoring', 'Protecting Your Privacy', and 'Collection Of Personal Identifiable Information (PII)'. The 'I agree to the terms and conditions' checkbox is checked. At the bottom, there are 'Cancel' and 'Next' buttons.

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

Health Care Quality Improvement System | Provider Resources

CMS Portal > Registration

Terms and Conditions

[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](#) for more details.

[Protecting Your Privacy](#)

Protecting your Privacy is a top priority at CMS. We are committed to ensuring the security and confidentiality of the user registering to EIDM. Please read the [CMS Privacy Act Statement](#) which describes how we use the information you provide.

[Collection Of Personal Identifiable Information \(PII\)](#)

"Personal" information is described as data that is unique to an individual, such as a name, address, telephone number, social security number and date of birth (DOB).

CMS is very aware of the privacy concerns around PII data. In fact, we share your concerns. We will only collect personal data to uniquely identify the user registering with the system. We may also use your answers to the challenge questions and other PII to later identify you in case you forget or misplace your User ID /Password.

I have read the HHS Rules of Behavior (HHS RoB), version 2010-0002.001S, dated August 26 2010 and understand and agree to comply with its provisions. I understand that violations of the HHS RoB or information security policies and standards may lead to disciplinary action, up to and including termination of employment; removal or debarment from work on Federal contracts or projects; and/or revocation of access to Federal information, information systems, and/or facilities; and may also include criminal penalties and/or imprisonment. I understand that exceptions to the HHS RoB must be authorized in advance in writing by the OPDIV Chief Information Officer or his/her designee. I also understand that violation of laws, such as the Privacy Act of 1974, copyright law, and 18 USC 2071, which the HHS RoB draw upon, can result in monetary fines and/or criminal charges that may result in imprisonment.

I agree to the terms and conditions

Cancel Next

Part II: FFM User Account (Step 3)

Step 3. Enter basic identifying information on the 'Your Information' page. Note that SSN is not required.

Click 'Next.'

Health Care Quality Improvement System Provider Resources

CMS Portal > Registration

Your Information

Enter your legal first name and last name, as it may be required for identity verification.

- First Name: Middle Name:

- Last Name: Suffix:

Enter your email address, as it will be used for account related communications.

- E-mail Address:

Re-enter your email address.

- Confirm E-mail Address:

Enter your full 9 digit social security number, as it may be required for identity verification.

Social Security Number:

Enter your date of birth, as it may be required for identity verification.

* Date of Birth:

MM | DD | YYYY

Enter your current or most recent home address, as it may be required for identity verification.

- Home Address Line 1:

Home Address Line 2:

- City: - State: - Zip Code: Zip Code Extension: Country: USA

Enter your primary phone number, as it may be required for identity verification.

* Primary Phone Number:

Part II: FFM User Account (Step 4)

Step 4. Create FFM user account. (FFM User ID, password, and challenge questions). Click 'Next.'

CMS Portal > Registration

Choose User ID and Password Choose User ID and Password

Choose User ID And Password

Your User ID must • Be a minimum of 6 and a maximum of 74 alphanumeric characters. • Allowed special characters are dashes (-), underscores (_), apostrophes ('), @ and periods (.) followed by alphanumeric characters.

- User ID

- Password

- Confirm Password

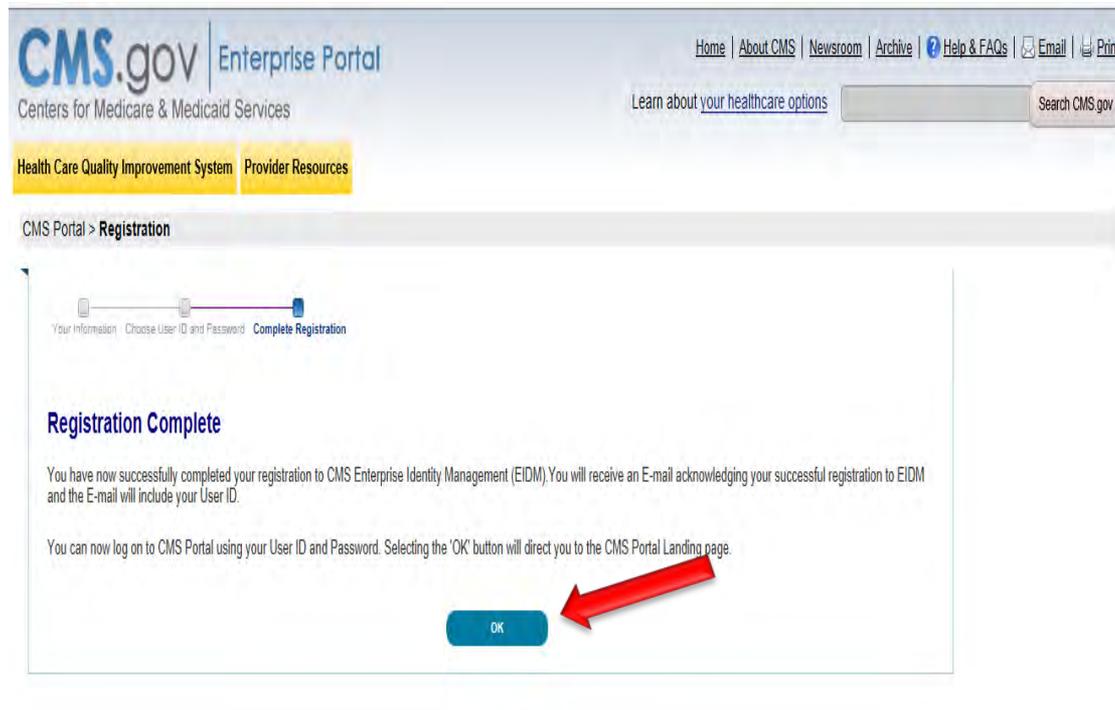
Select your Challenge Questions and Answers:

Your challenge questions and answers will be required for password and account management functions.

- Question:1	<input type="text"/>	- Answer:1	<input type="text"/>
- Question:2	<input type="text"/>	- Answer:2	<input type="text"/>
- Question:3	<input type="text"/>	- Answer:3	<input type="text"/>

Part II: FFM User Account (Step 5)

Step 5. The screen will display 'Registration Complete.' Click 'OK' and the EIDM system will redirect you back to the CMS Enterprise Portal page, where you will log back in with your new FFM User ID and password.



The screenshot displays the CMS.gov Enterprise Portal interface. At the top, the CMS.gov logo and 'Enterprise Portal' are visible, along with navigation links for Home, About CMS, Newsroom, Archive, Help & FAQs, Email, and Print. Below the logo, the text 'Centers for Medicare & Medicaid Services' is present. A search bar with the text 'Learn about your healthcare options' and a 'Search CMS.gov' button is located on the right. Two yellow buttons, 'Health Care Quality Improvement System' and 'Provider Resources', are positioned below the search bar. The main content area shows a breadcrumb trail 'CMS Portal > Registration' and a progress indicator with three steps: 'Your Information', 'Choose User ID and Password', and 'Complete Registration'. The 'Complete Registration' step is highlighted. Below the progress indicator, the heading 'Registration Complete' is displayed. The text below the heading reads: 'You have now successfully completed your registration to CMS Enterprise Identity Management (EIDM). You will receive an E-mail acknowledging your successful registration to EIDM and the E-mail will include your User ID.' and 'You can now log on to CMS Portal using your User ID and Password. Selecting the 'OK' button will direct you to the CMS Portal Landing page.' A blue 'OK' button is located at the bottom of the message box, with a red arrow pointing to it.

Part II: FFM User Account (Step 6)

Step 6. Select 'Login to CMS Secure Portal.'

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

Home | About CMS | Newsroom | Archive | Help & FAQs | Email | Print

Learn about your healthcare options Search CMS.gov

Health Care Quality Improvement System Provider Resources

CMS Portal > Welcome to CMS Portal

Welcome to CMS Enterprise Portal

The CMS Enterprise Portal is a gateway being offered to allow the public to access a number of systems related to Medicare Advantage, Prescription Drug, and other CMS programs.

CMS Enterprise Portal Medicaid/CHIP Medicare Shared Savings Program

CMS Provides Health Coverage for 100 Million People...

...through Medicare, Medicaid, and the Children's Health Insurance Program. And with health insurance reforms and health care exchanges, we are improving health care and ensuring coverage for all Americans.

[Learn more about how CMS is implementing the Affordable Care Act](#)

CMS Secure Portal

To log into the CMS Portal a CMS user account is required.

If you are unable to log into the CMS Portal using your CMS user account, please contact the CMS helpdesk at 1-800-562-1963.

[Login to CMS Secure Portal](#)

FFE/HIOS only

[Forgot User ID?](#)

[Forgot Password?](#)

[New User Registration](#)

CMS News

States Moving Forward to implement Health Reform

Easier electronic funds transfers mean more time with patients and cost savings

Healthcare Professionals Selected as Innovation Advisors will Improve Care

10,000 People with Medicare Can Get Most Care at Home with Demonstration

Part II: FFM User Account (Step 7)

Step 7. Enter the FFM user ID and password you created in step 4. Select 'Log In.'

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

Home | About CMS | Newsroom | Archive | Help & FAQs | Email | Print

Health Care Quality Improvement System | Provider Resources

Welcome to CMS Enterprise Portal

To log into the CMS Portal a CMS user account is required.

User ID

Password

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

Part II: FFM User Account (Step 8)

Step 8. On the 'My Access' page, select 'Request New Application Access' under 'Request Application Access'

CMS .gov Enterprise Portal

My Portal

CMS Portal > My Portal

Welcome to CMS Enterprise Portal

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

Provisioning

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

1. **EIDM** - Presently, only FFE/HIOS applications are provisioned using EIDM. If you need access to applications integrated with EIDM please click "Request Access Now" found on the right-hand side of this page, or click [here](#).
2. **EUA** - To get access to applications that are supported by EUA click [here](#). Please click the [EUA link](#) for more details.
3. **IACS** - To get access to applications that are supported by IACS click [here](#).

Request Application Access

Use the link below to request access to more applications (FFE/HIOS applications only).

[Request Access Now](#)

Contact Help Desk

CMS Help Desk / EUA - 1-800-562-1963

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

IACS Help Desk - Contact the appropriate [IACS Help Desk](#) based on the application you are trying to access.

Part II: FFM User Account (Step 9)

Step 9. Under 'My Access,' select 'Request New Application.'

The screenshot displays the CMS Enterprise Portal interface. At the top left, the CMS .gov logo and 'Enterprise Portal' text are visible. Below this is a 'MyPortal' button. A breadcrumb trail shows 'CMS Portal > My Access'. The main content area is divided into two columns. The left column is titled 'My Access' and contains two links: 'Request New Application Access' (highlighted with a red arrow) and 'View and Manage My Access'. The right column is titled 'View and Manage My Access' and contains a 'Take An Action' button. A tooltip box is positioned over the 'Request New Application Access' link, displaying the text 'Goto Request New Application Access' and 'Please request access to an application.'

Part II: FFM User Account (Step 10)

Step 10. Next to 'Application Description' select 'FFM - FFM Application.'

The screenshot displays the CMS Enterprise Portal interface. At the top, there is a navigation bar with links for 'Portal Help & FAQs', 'Print', 'Log Out', and a user greeting 'Welcome Dilly Peterson'. Below this is the 'CMS.gov Enterprise Portal' logo and a 'MyPortal' button. The main content area is titled 'Request New Application Access' and includes a 'My Access' sidebar with links for 'Request New Application Access' and 'View and Manage My Access'. The main section contains the instruction 'Select an application and then a role to request access.' and a form field for 'Application Description'. A dropdown menu is open, showing a list of applications: 'Select the Application', 'QMAT - Quality Measures Assessment Tool Application', 'SHOP - SHOP Application', 'ABC - ABC Application', 'HIOS - HIOS Application', 'FFM - FFM Application' (highlighted in blue), 'TESTMFA - Test Appli...', 'ZONE - ZONE Appli...', 'EIDM - EIDM Application', and 'EIDMSTEPUP - EIDMSTEPUP Test Application'. A red arrow points to the 'FFM - FFM Application' option.

Part II: FFM User Account (Step 11)

Step 11. Select your role: 'FFM Agent Broker.'

Portal Help & FAQs Print Log Out Welcome Dilly Peterson

CMS.gov Enterprise Portal

MyPortal

CMS Portal > My Access

My Access

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

Request New Application Access

Select an application and then a role to request access.

Application Description: FFM - FFM Application

Role: **FFM Agent Broker**

Agent/Broker

CMS is establishing a system to determine consumer eligibility and a mechanism for consumers to enroll in a qualified health plan (QHP).

Part II: FFM User Account (Step 12)

Step 12. Enter your NPN and MLN User ID. When finished, click ‘Submit.’

It is vital that you enter both of these identifiers accurately. If you do not enter your NPN or MLN User ID, the system will not be able to confirm the completion of your training.

My Access

[Request New Application Access](#)

[View and Manage My Access](#)

Request New Application Access

Select an application and then a role to request access.

* Application Description:

* Role:

Enter validation data

Please enter a valid MLN User ID and NPN to continue with the role request. (Your NPN is a 10-digit number. If you do not know your NPN, you can find it at: <https://pdb.npr.com/html/PacNpnSearch.html>)

You must complete the Agent/Broker web-based training on the Medicare Learning Network (MLN) in order to request the role of Agent/Broker here. If you have not yet completed the Agent/Broker web-based training, please do so at <https://Marketplace.MedicareLearningNetwork.MS.com>.

Please note that it may require two business days for your Agent/Broker training results from MLN to be reflected in your account. If the information you entered here was correct but could not be validated, please try again later. For further assistance, please contact the Email Help Desk at FFMProducer-AssisterHelpDesk@cms.hhs.gov. If contacting the Email Help Desk, your initial email can be addressed more quickly if you include your first name, last name, NPN, and MLN User ID.

* NPN:

* MLN UID:

Cancel

Submit



Part II: FFM User Account (Step 13)

Step 13. You will be returned to the 'My Access' page. Read the explanation under 'Remote Identity Proofing' and click 'Next'

The screenshot shows the CMS Enterprise Portal interface. At the top, there are navigation links for 'Portal Help & FAQs', 'Print', 'Log Out', and a user welcome message 'Welcome Dilly Peterson'. The main header displays the CMS.gov logo and 'Enterprise Portal'. Below this, a yellow 'MyPortal' button is visible. The breadcrumb trail indicates 'CMS Portal > My Access'. The page is divided into two columns. The left column, titled 'My Access', contains links for 'Request New Application Access' and 'View and Manage My Access'. The right column, titled 'Remote Identity Proofing', contains a paragraph of text and a bulleted list of instructions. A red arrow points to the 'Next' button at the bottom of the page.

Portal Help & FAQs Print Log Out Welcome Dilly Peterson

CMS.gov Enterprise Portal

MyPortal

CMS Portal > My Access

My Access

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

Remote Identity Proofing

You have selected a role that requires a higher level of security. 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 and email address correctly. We will only collect the directions provided - <http://www.experian.com>. For Experian Frequently Asked Questions, select this link - <http://www.experian.com/corporate/personal-services-contacts-faq.html>
- 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.
- Confirm that you have your personal and financial information available, as the Experian application will pose questions to you, based on data in their files. You may want to obtain a copy of your credit report, before proceeding with the role request by selecting this link and following the directions provided - [Experian Link](#)

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. Do you want to continue?

Cancel Next

Part II: FFM User Account (Step 14)

Step 14. You will be returned to the 'My Access' page.

Read the 'Terms and Conditions,' click 'I agree to the terms and conditions,' then click 'Next.'

My Access

[Request New Application Access](#)

[View and Manage My Access](#)

Terms and Conditions

Protecting Your Privacy

Protecting your Privacy is a top priority at CMS. We are committed to ensuring the security and confidentiality of the user registering to EIDM. Please read the [CMS Privacy Act Statement](#), which describes how we use the information you provide.

Personal information is described as data that is unique to an individual, such as a name, address, telephone number, social security number, and date of birth (DOB). CMS is very aware of the privacy concerns around PII data. In fact, we share your concerns. We will only collect personal information to verify your identity. Your information will be disclosed to Experian, an external authentication service provider, to help us verify your identity. If collected, we will validate your Social Security number with Experian only for the purposes of verifying your identity. Experian verifies the information you give us against their records. We may also use your answers to the challenge questions and other PII to later identify you in case you forget or misplace your User ID /Password.

HHS Rules Of Behavior

We encourage you to read the [HHS Rules of Behavior](#), which provides the appropriate use of all HHS information technology resources for Department users, including Federal employees, contractors, and other system users.

I have read the HHS Rules of Behavior (HHS RoB), version 2010-0002.001S, dated August 26 2010 and understand and agree to comply with its provisions. I understand that violations of the HHS RoB or information security policies and standards may lead to disciplinary action, up to and including termination of employment; removal or debarment from work on Federal contracts or projects; and/or revocation of access to Federal information, information systems, and/or facilities; and may also include criminal penalties and/or imprisonment. I understand that exceptions to the HHS RoB must be authorized in advance in writing by the OPDIV Chief Information Officer or his/her designee. I also understand that violation of laws, such as the Privacy Act of 1974, copyright law, and 18 USC 2071, which the HHS RoB draw upon, can result in monetary fines and/or criminal charges that may result in imprisonment.

Identity Verification

I understand that the identity proofing services being requested are regulated by the Fair Credit Reporting Act and that my explicit consent is required to use these services. I understand that any special procedures established by CMS for identity proofing using Experian have been met and the services requested by CMS to Experian will be used solely to confirm the applicant's identity to avoid fraudulent transactions in the applicant's name.

I agree to the terms and conditions

Cancel

Next

You must agree to the Terms and Conditions in order to

Part II: FFM User Account (Step 15)

Step 15. You will be prompted to enter your identifying information. This information will be used to create the identity proofing questions. Click 'Next' when you have finished.



My Access

[Request New Application Access](#)

[View and Manage My Access](#)

Your Information Verify Your Identity

Your Information

Enter your legal first name and last name, as it may be required for identity verification.

* First Name:

Dilly

Middle Name:

* Last Name:

Peterson

Suffix:

Enter your email address, as it will be used for account related communications.

* E-mail Address:

dshetty@gssinc.com

Re-enter your email address.

* Confirm E-mail Address:

Enter your full 9 digit social security number, as it may be required for identity verification.

* Social Security Number:

Enter your date of birth, as it may be required for identity verification.

* Date of Birth:

MM DD YYYY

Enter your current or most recent home address, as it may be required for identity verification.

* Home Address Line 1:

1000 Little Patuxent Parkway

Home Address Line 2:

* City:

Columbia

* State:

Maryland

* Zip Code:

21065

Zip Code Extension:

Country: USA

Enter your primary phone number, as it may be required for identity verification.

* Primary Phone Number:

Cancel

Next

Part II: FFM User Account (Step 16)

Step 16 You will be prompted to answer the “Out-of-Wallet” questions.

These questions are called “Out-of-Wallet” because the correct response may not be found in your wallet or purse. (E.g. What is the name of your student loan lender?)

My Access

[Request New Application Access](#)

[View and Manage My Access](#)

Verify Your Identity

Next Information: Verify Your Identity

I was born within a year or on the year of the date below.

1980

1983

1986

1989

NONE OF THE ABOVE

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

NEWBURN

NEW BERN

MIDWAY PARK

KINSTON

NONE OF THE ABOVE

Which of the following is a current or previous employer? If there is not a matched employer name, please select 'NONE OF THE ABOVE.'

ORGANIC PRODUCTS

SAFEWAY

CODA ACQUISITION GROUP

JOSE GUERRERO

NONE OF THE ABOVE

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.'

(352)221-7053

(352)212-8365

(352)214-4270

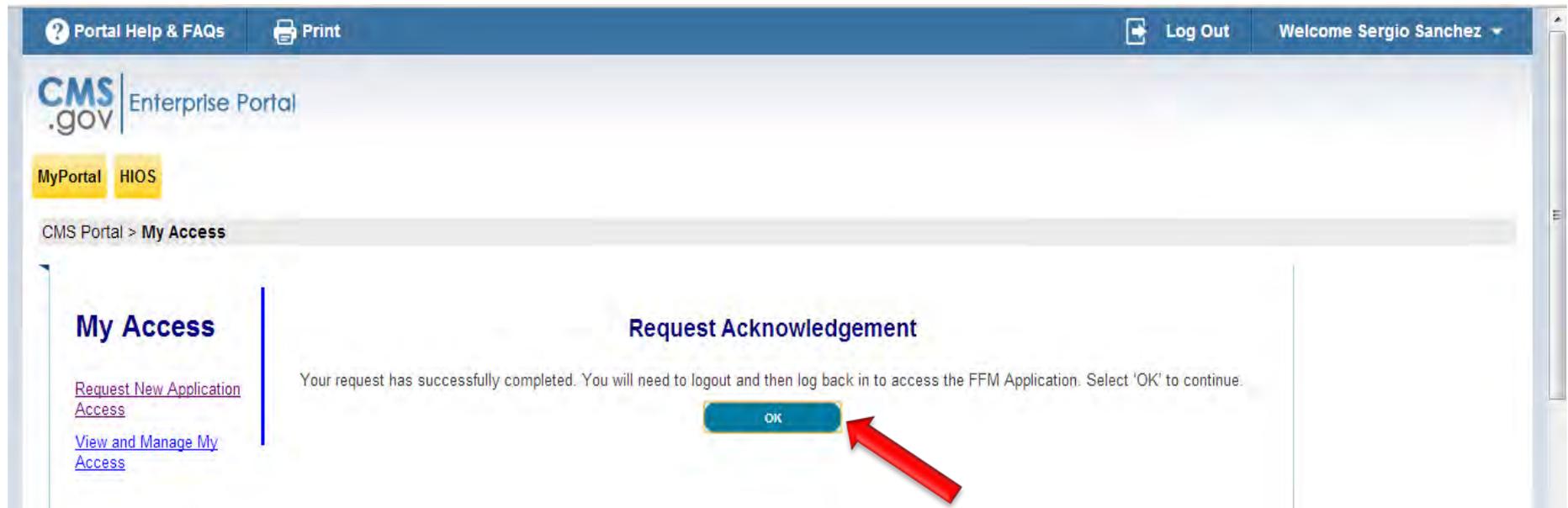
(352)233-3271

NONE OF THE ABOVE

Answer Out of
Wallet Questions
and select 'Next.'

Part II: FFM User Account (Step 17)

Step 17 When you have completed the questions, your FFM User ID will be activated, and you will be granted the Agent/Broker role.



The screenshot displays the CMS Enterprise Portal interface. At the top, there is a navigation bar with links for 'Portal Help & FAQs', 'Print', 'Log Out', and a user greeting 'Welcome Sergio Sanchez'. Below this, the 'CMS.gov Enterprise Portal' logo is visible, along with 'MyPortal' and 'HIOS' buttons. The main content area shows a breadcrumb trail 'CMS Portal > My Access' and a 'Request Acknowledgement' section. The message states: 'Your request has successfully completed. You will need to logout and then log back in to access the FFM Application. Select 'OK' to continue.' A blue 'OK' button is highlighted with a red arrow pointing to it. On the left side, there is a 'My Access' sidebar with links for 'Request New Application Access' and 'View and Manage My Access'.

Annual Registration Renewal

- On an annual basis, agents and brokers participating in the Individual Marketplace must:
 - Re-take the Affordable Care Act and Marketplace Basics and Individual Marketplace courses and pass the corresponding exams
 - Re-accept the Individual Marketplace Agreements
- Agents and brokers participating in the SHOP Marketplace:
 - Are not required, but are strongly encouraged, to re-take the Affordable Care Act and Marketplace Basics and SHOP Marketplace courses and take the corresponding exams on an annual basis
 - Are required to re-accept the SHOP Marketplace Agreement on an annual basis



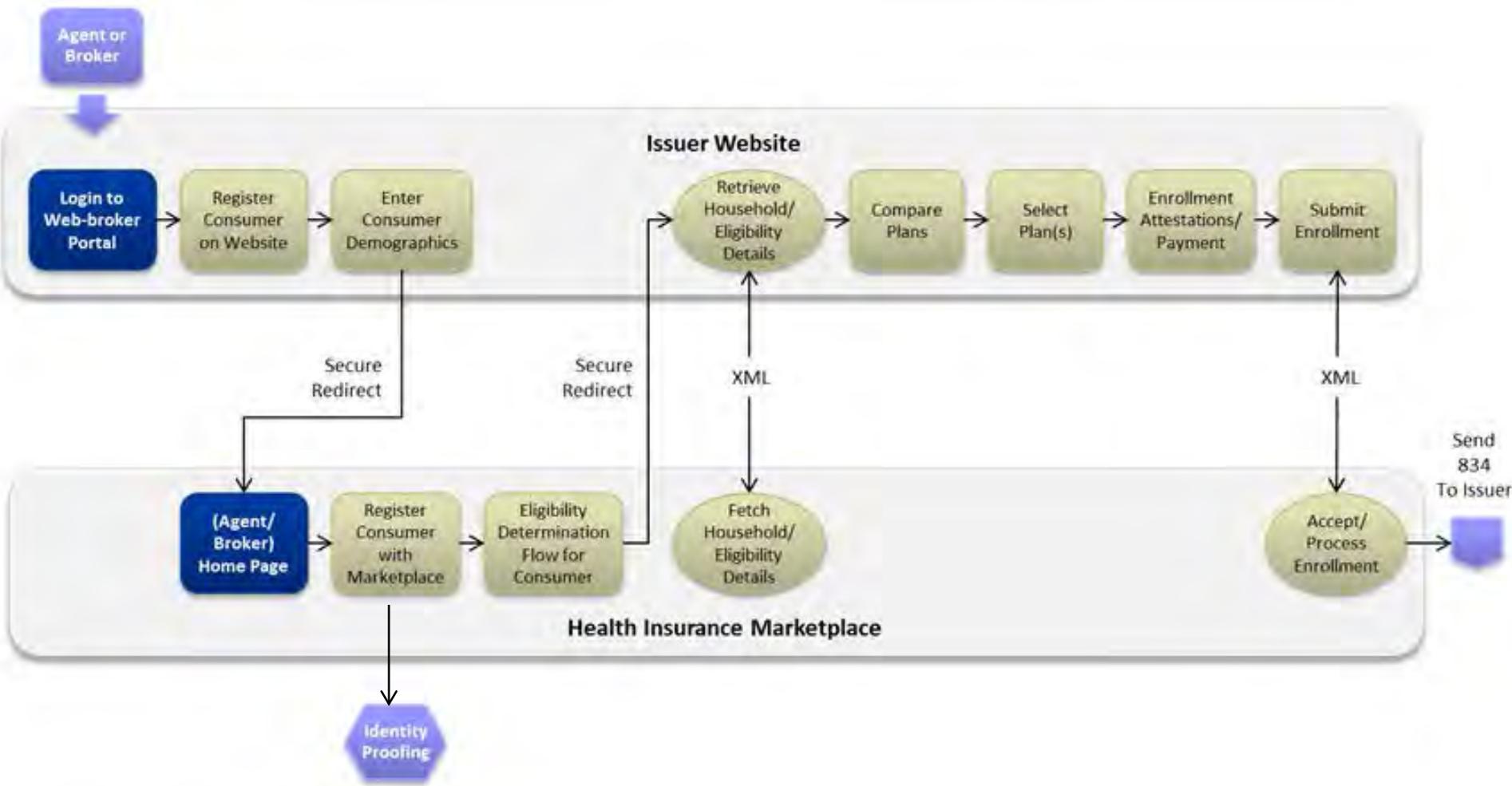
Assisting Consumers with Eligibility Determinations and Enrollment



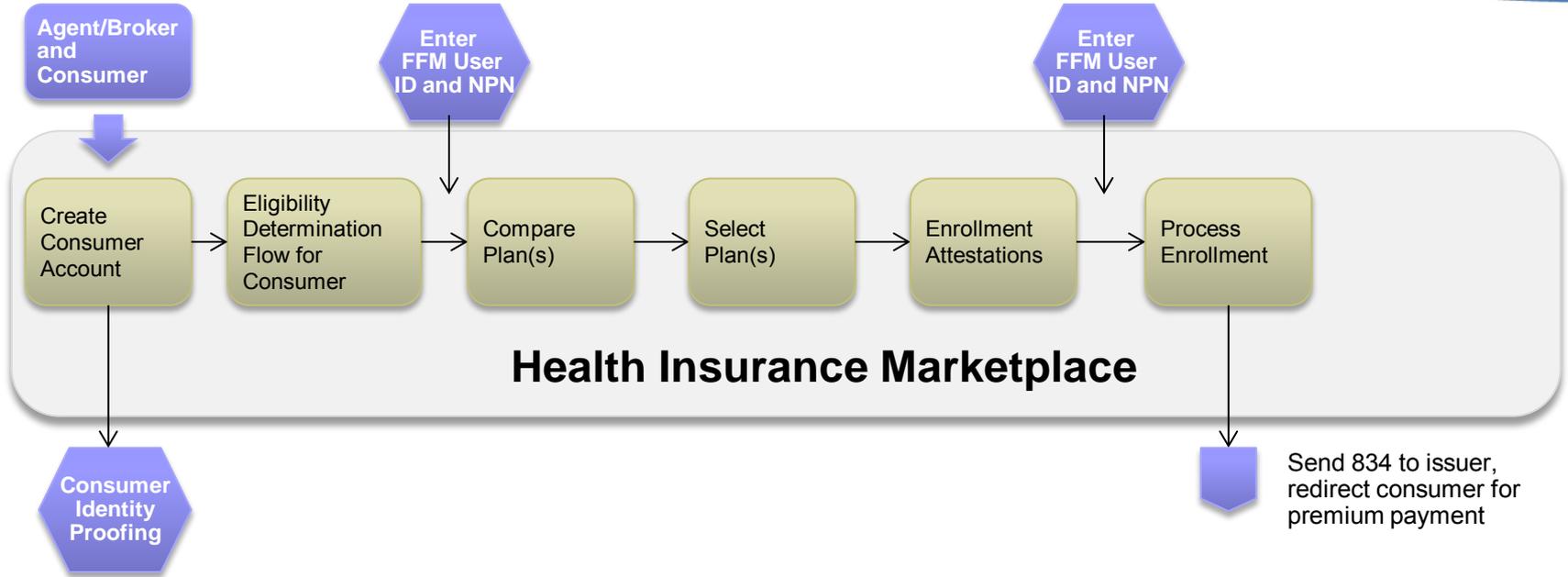
Pathways to Assist Consumers

- Agents and brokers will be able to use two pathways to assist consumers with eligibility determinations and enrollment in QHPs:
 1. Direct Enrollment Pathway
 2. Marketplace Pathway
- Agents and brokers who operate in the Individual Marketplace may conduct FFM enrollment activities through the Direct Enrollment or Marketplace Pathway
- Web-brokers will employ a Direct Enrollment pathway for agents and brokers who operate in the Individual Marketplace
- Agents and brokers who operate in the SHOP Marketplace will conduct enrollment activities only through the Marketplace Pathway

Direct Enrollment Pathway



Marketplace Pathway



Questions?

To submit questions by webinar:

- *type your question in the text box under the 'Q&A' tab*

Additional Resources

Resources

- **Resources for Agents and Brokers in the Health Insurance Marketplace**
Available at: <http://www.cms.gov/CCIIO/Programs-and-Initiatives/Health-Insurance-Marketplaces/a-b-resources.html>
- **The Role of Agents, Brokers, and Web-brokers in Health Insurance Marketplaces**
Available at: [http://www.cms.gov/CCIIO/Resources/Regulations-and-Guidance/index.html#Affordable Insurance Exchanges](http://www.cms.gov/CCIIO/Resources/Regulations-and-Guidance/index.html#Affordable%20Insurance%20Exchanges)
- **General CCIIO Resources**
Available at: <http://www.cms.gov/CCIIO/Resources/Fact-Sheets-and-FAQs/index.html>
- **Medicare Learning Network (MLN)**
Available at: <https://Marketplace.MedicareLearningNetworkLMS.com>
- **CMS Enterprise Portal**
Available at: <https://portal.cms.gov>
- **Healthcare.gov**
Available at: <https://healthcare.gov> and <https://healthcare.gov/small-businesses>

Acronyms

Acronym	Definition
NPN	National Producer Number
MLN	Medicare Learning Network
FFM	Federally-facilitated Marketplace
FF-SHOP	Federally-facilitated SHOP
SHOP	Small Business Health Options Program
QHP	Qualified Health Plan
SPM	State Partnership Marketplaces
CMS	Centers for Medicare & Medicaid Services
CCIIO	Center for Consumer Information and Insurance Oversight

Closing Remarks