Plan Year 2022 Health Insurance Marketplace® Registration and Training for New Agents and Brokers

October 5, 2021

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

Health Insurance Marketplace® is a registered service mark of the Department of Health and Human Services.

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 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.

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Intended Audience

The intended audience for this presentation includes 1) agents and brokers joining the Marketplace for the first time for plan year 2022 and 2) agents and brokers who participated in a previous plan year but did NOT complete plan year 2021 Marketplace registration and training.

- "New" agents and brokers who did not complete registration and training for plan year 2021 are required to complete the full Individual Marketplace training for plan year 2022 if assisting with Individual Marketplace enrollments. They are required to execute the applicable Marketplace Agreements.

- "Returning" agents and brokers who successfully completed registration and training for the plan year 2021 are eligible for "What's New for Returning Agents and Brokers" training for plan year 2022. 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 2022!

Thank you for your interest in the Marketplace for plan year 2022!*

- 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 2022! (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 2022 Health Insurance Marketplace® Registration and Training for New Agents and Brokers

Marketplace Registration and Training Process

System Reminders for Plan Year 2022

Marketplace Learning Management System (MLMS) Profile

- List of "Spoken Languages"

  - You can select from a list of languages that you speak and are proficient enough in to assist consumers with enrollments.

  - This information may be shared and displayed on Find Local Help and Help On Demand.

- Address field to capture your mailing address for official correspondence from the Centers for Medicare & Medicaid Services (CMS), and a check box to indicate if it is the same as your physical address*

- Real-time National Producer Number (NPN) validation to allow you to quickly correct any errors identified during the validation process

  - In some cases, you may be required to update your Social Security number in your Portal profile.

Mailing addresses are for official correspondence between you and the Marketplace and will not be displayed on Find Local Help.

System Reminders for Plan Year 2022

National Producer Number Validation

- CMS validates your NPN against data stored in the [National Insurance Producer Registry (NIPR) Public Database.](#)
  - Results of this NIPR NPN validation appear on the public [Agent and Broker Federally-facilitated Marketplace Registration Completion List](#) (RCL).
  - The RCL is updated daily.
- NPN validation occurs during the annual registration process in the MLMS and is only applicable to the current plan year. If you do not maintain a valid NPN, your agreements with the Marketplace may be terminated.
- To be validated, you must:
  - Have a valid state license;
  - Have a health-related line of authority (LOA) (additional information can be found [here](#)); and
  - Have an active status for your health-related LOA.
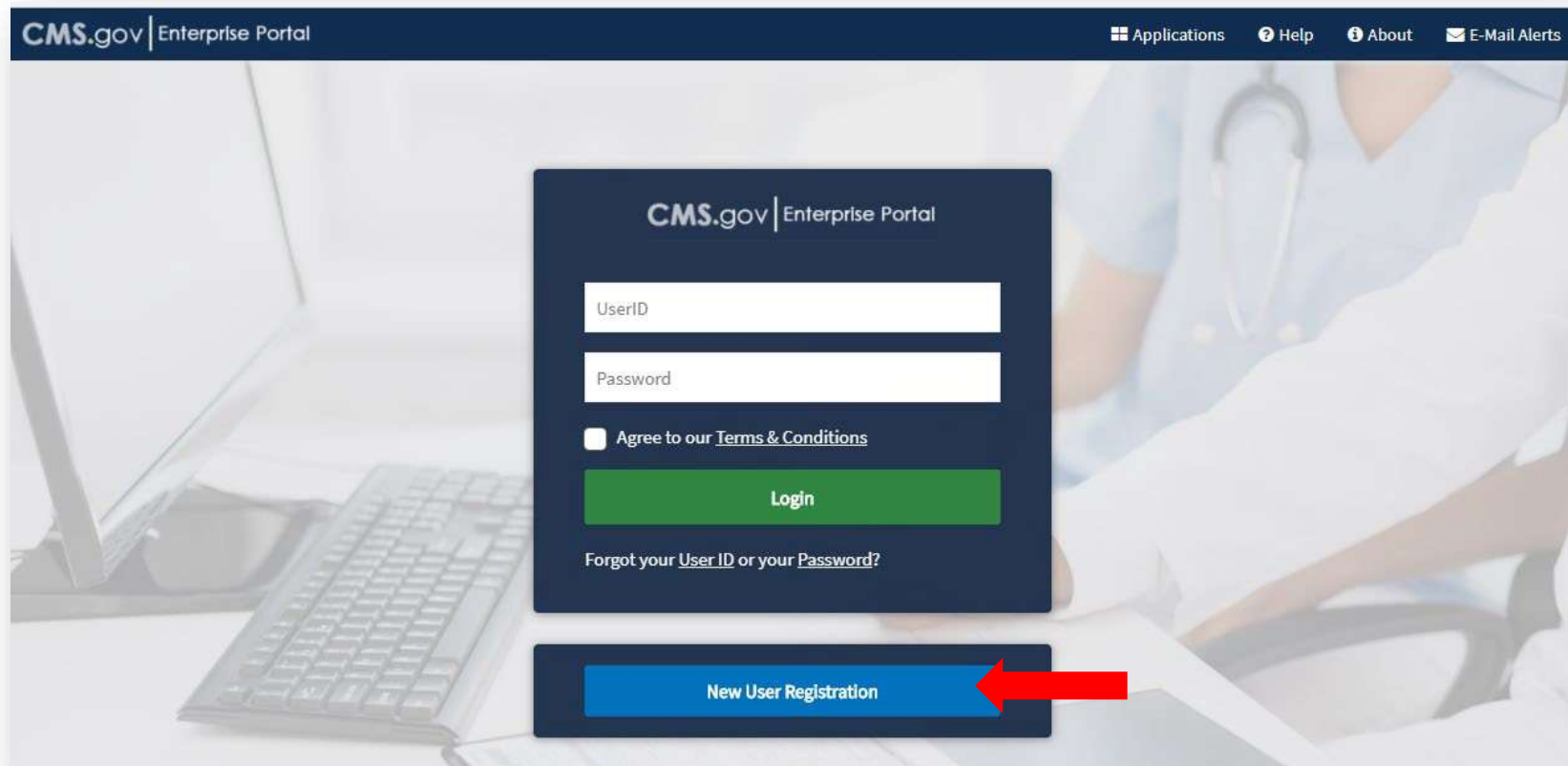
Registration and Training for New Agents and Brokers

If you wish to participate in the Marketplace for plan year 2022, you must complete the following actions:

1. Create a CMS Enterprise Portal account.
2. Request the Agent Broker Training Access role.
3. Complete remote identity proofing through the Identity Management (IDM) 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 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 into the CMS Enterprise Portal and printing your completion certificate.

Step 1: Agent or Broker Creates a CMS Enterprise Portal Account
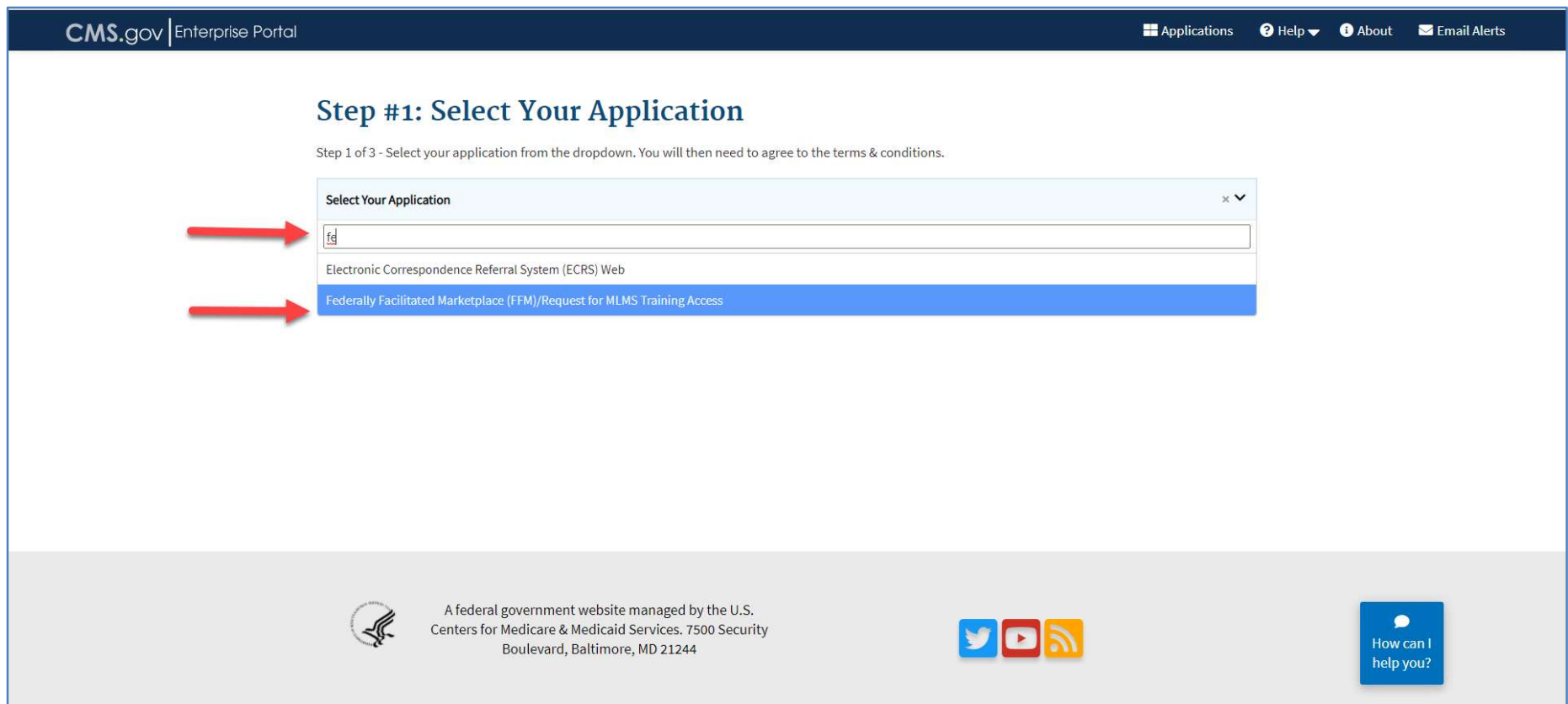
If you do not already have a CMS Enterprise Portal account*, navigate to https://portal.cms.gov and select the "New User Registration" button.

*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)

Enter "Fed" into the Access Catalog search bar.

Select the "Federally Facilitated Marketplace (FFM)/Request for MLMS Training Access" Application and Click Next.

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."

Enter the requested information and select "Next."

- Create an FFM User ID and password.
- Choose challenge questions and provide answers, then select "Next."

Step #3: Create User ID, Password & Security Question/Answer

Step 3 of 3 - Please create User ID and Password. Select a Security Question and provide Answer.

All fields are required unless marked (optional).

Enter User ID

Enter Password   Confirm Password

Security answer to be used in case you forget your password or you need to unlock your account.

Select Security Question

Enter Security Answer

Back   Next   Cancel

Review the information you entered, make any necessary changes, and then select "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.
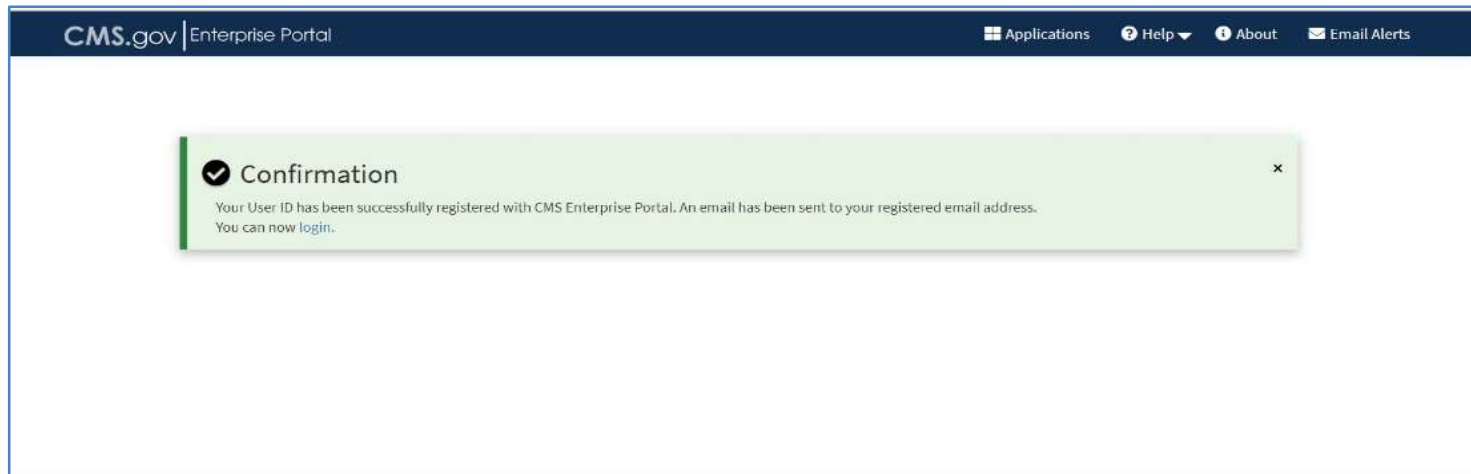
Remember! You must log in to the CMS Enterprise Portal and change your password every 180 days to maintain system access.

Registration and Training for New Agents and Brokers
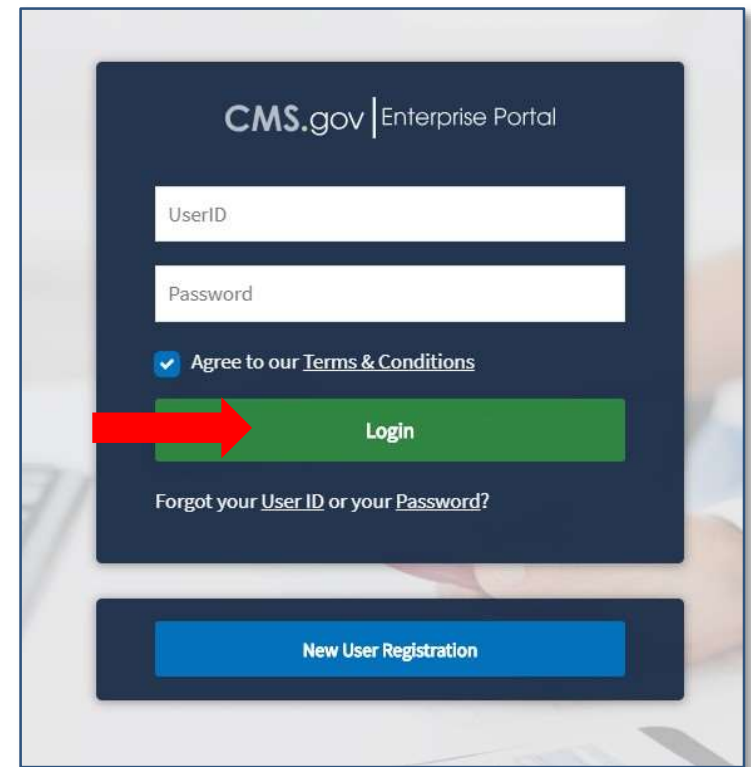
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6. Read and accept the applicable Marketplace Agreement(s) on the MLMS.
7. Confirm completion of all registration steps by logging back into the CMS Enterprise Portal and printing your completion certificate.

Step 2: Agent or Broker Requests the FFM Agent Broker Training Access Role*

- Once you receive your account creation notification via email, or after waiting a few minutes for the system to update, log back into 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.

- After reading, 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 2020, you will need to request the FFM Agent Broker training access role when you log in to your CMS Enterprise Portal account if you did not complete registration for plan year 2021.

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

On the "My Portal" page, select the "Add Application" button. to access the Application Catalog

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

- Enter "Fed" into the Access Catalog search bar.
- Select the "Federally Facilitated Marketplace (FFM) / Request for MLMS Training Access" Application and Click Next.

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

- Select "Agent Broker Training Access" from the "Select a Role" drop-down menu.
- Select the "Next" button.

Registration and Training for New Agents and Brokers

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

- Launch Identity Proofing

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

- Step #1: Identity Verification Overview
  - After reading the instruction, click Next.

Step #1: Identity Verification Overview

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.

1. Ensure that you have entered your legal name, current home address, phone number, date of birth and email address correctly. We will only collect personal information to verify your identity with Experian, an external Identity Verification provider.
2. 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.
3. 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'.
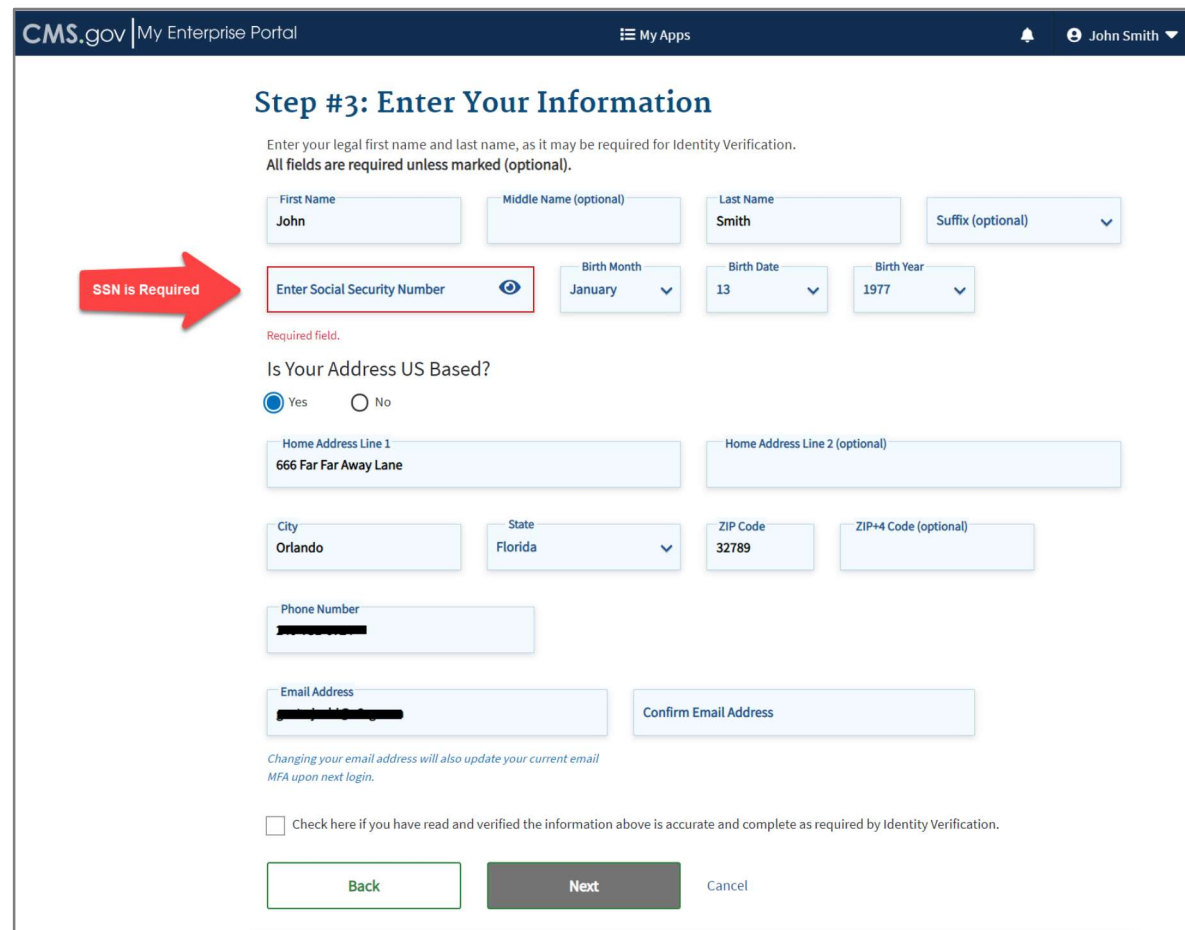
Next   Cancel

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

- Step #2: Accept Terms & Conditions
  - After reading terms and conditions, click "I Agree" and Next.

Step #3: Enter Your Information

- 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.

Registration and Training for New Agents and Brokers

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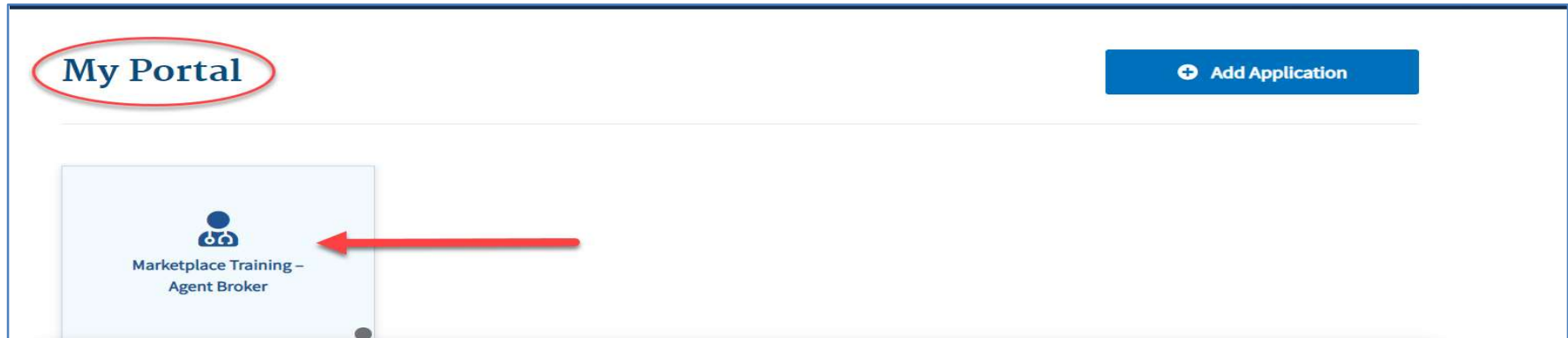# Step 4: Agent or Broker Completes MLMS Profile

After completing identity proofing, you will complete training through the MLMS.

- You will need to create your MLMS profile prior to completing training.

- You will need to execute(i.e., sign) the applicable Marketplace Agreement(s) after you have completed training.

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

- To access your MLMS profile and CMS-developed training, click on the Marketplace Training – Agent Broker tile.

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

The MLMS profile page will appear for you to complete your role and business and/or professional contact information.

You will need to select one role from four options.

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.*
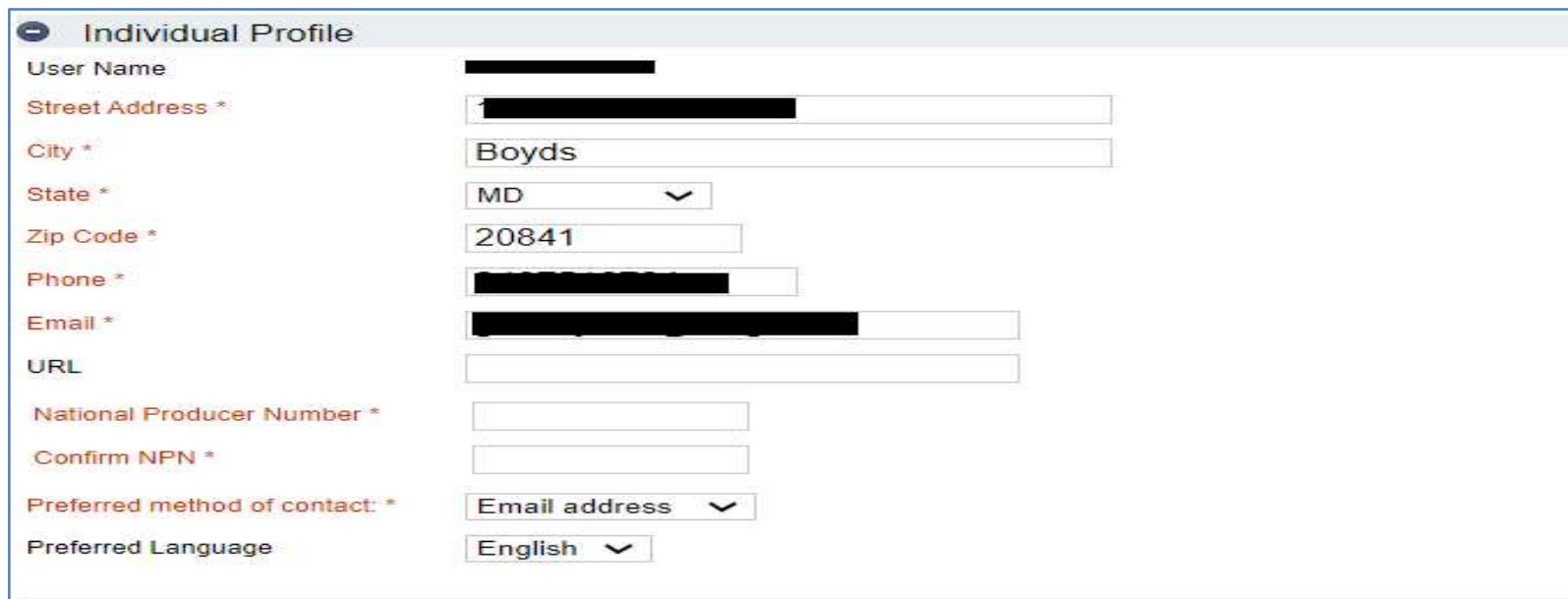
Find Local Help **and Help On Demand** **

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 referral system that quickly connects consumers seeking enrollment assistance on HealthCare.gov with Marketplace-registered, state-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.

*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.

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.

> 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.

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.

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

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

Registration and Training for New Agents and Brokers

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6. Read and accept the applicable Marketplace Agreement(s) on the MLMS.
7. Confirm completion of all registration steps by logging back into the CMS Enterprise Portal and printing your completion certificate.

Step 5: Agent or Broker Completes Training

- Complete Training via the CMS Enterprise Portal:
  - CMS-developed training through the MLMS (Individual Marketplace and Small Business Health Options Program [SHOP])
- You only need to complete training one time
- There is no fee associated with completing the training on the MLMS
- No CEUs are offered for completing training

- 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.

Step 5: Agent or Broker Completes Training (Continued)

- For plan year 2022, Marketplace Agent and Broker Training for new agents and brokers the following core training modules available:
  - 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
  - American Rescue Plan Act of 2021

- There are four exams* associated with the training:
  - Basics Exam
  - Individual Marketplace Exam
  - Privacy and Security Standards Exam
  - American Rescue Plan Act of 2021 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 MLMS Training

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

Step 5: 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.

Training Options

View the knowledge resources that have been recommended to you.

| Active | Bookmarked | Ignored |

Recommendations

Recommended in the Past (Days) 10   Recommendation Type All

Restore Defaults

☐ Group by Recommendation Type

Active Recommendations

	Recommendation	Recommendation Type	Sources	Recommended On	Actions
☐	PY 2022 AB Marketplace Training – Individual Marketplace (IM)	Curriculum	(1)AgentBroker	06/20/2018	Actions
☐	PY 2022 AB Marketplace Training – Small Business Health Options Program (SHOP)	Curriculum	(1)AgentBroker	06/20/2018	Actions

Step 5: 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.

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

Select "Go to Current Learning" at the bottom of the page.

Step 5: 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.

Registration and Training for New Agents and Brokers

If you wish to participate in the Marketplace for plan year 2022, you must complete the following actions:

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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 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 into the CMS Enterprise Portal and printing your completion certificate.

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

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

- You must request the FFM Agent Broker Training Access 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 <u>not</u> need to complete it again.

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5. Complete Marketplace training on the MLMS 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 CMS Enterprise Portal and printing your completion certificate.

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 "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.
- On the MLMS landing page, access your training courses and agreements by accessing respective links under "Current Learning" section on the page.

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).
- To Print Certificate(s), click on the "Actions" link on the Curriculum Status page, and then click "Print Certificate.

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

Then scroll over the "Actions" bubble and select "Print Certificate."

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

Registration Completion Certificate

Jon Doe

NPN(s): 1234567890

Individual Marketplace

Registration status for plan year 2022
Completed on 9/1/2021

Health Insurance Marketplace

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.

- 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 2022, go to the Marketplace Registration Tracker to check your Marketplace registration status.
  - Enter your NPN and ZIP code.
  - Information is updated daily by 5:00 PM ET.

- If you still need assistance, send an email to: 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 1-855-267-1515 or CMS_FEPS@cms.hhs.gov.

Plan Year 2022 Health Insurance Marketplace® 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	FFMProducer-AssisterHelpDesk@cms.hhs.gov	• General enrollment and compensation questions • Manual identity proofing/Experian issues • Escalated registration and training questions (not related to a specific training platform) • Agent/Broker Registration Completion List issues • Find Local Help listing issues • Help On Demand participation instructions or questions • Report concerns that a consumer or another agent or broker has engaged in fraud or abusive conduct	Monday-Friday 8:00 AM–6:00 PM ET
Marketplace Service Desk	855-CMS-1515 855-267-1515 CMS_FEPS@cms.hhs.gov	• CMS Enterprise Portal password resets and account lockouts • Other CMS Enterprise Portal account issues or error messages • General registration and training questions (not related to a specific training platform) • Login issues on the Classic Direct Enrollment agent/broker landing page • Technical or system-specific issues related to the Marketplace Learning Management System (MLMS) • User-specific questions about maneuvering in the MLMS site, or accessing training and exams	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: • Password reset for a consumer HealthCare.gov account, • Special enrollment period not available on the consumer application, or • Consumer specific eligibility and enrollment questions	Monday-Sunday 24 hours/day

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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	MLMSHelpDesk@cms.hhs.gov	• Technical or system-specific issues related to the MLMS • User-specific questions about maneuvering in the MLMS site, or accessing training and exams	Monday-Friday 9:00 AM–5:30 PM ET
SHOP Call Center	800-706-7893	• Inquiries related to SHOP eligibility determinations on HealthCare.gov • Contact the insurance company for most questions about SHOP plans, such as applications, enrollment, renewal, or changing or updating coverage.	Monday-Sunday 24 hours/day
Marketplace Appeals Center	1-855-231-1751 TTY users 1-855-739-2231	• Status of a Marketplace eligibility appeal • How to appoint an Authorized Representative to request Marketplace eligibility appeal on a consumer's behalf	Monday-Friday 7:00 AM–8:30 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 2022 Health Insurance Marketplace® 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	https://www.agentbrokerfaq.cms.gov/s/
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	https://data.healthcare.gov/ffm_ab_registration_lists
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	https://data.healthcare.gov/ab-registration-tracker/
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	https://localhelp.healthcare.gov/
Help On Demand	Help On Demand is a referral system that quickly connects consumers seeking enrollment assistance on HealthCare.gov with Marketplace-registered, state-licensed agents and brokers in their area who can provide immediate assistance with Marketplace plan selection and enrollment	https://www.cms.gov/CCIIO/Programs-and-Initiatives/Health-Insurance-Marketplaces/Help-On-Demand-for-Agents-and-Brokers

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	www.nipr.com/PacNpnSearch.htm
List of Approved Health-related Lines of Authority	Provides a list of valid health-related lines of authority for agents and brokers	https://data.healthcare.gov/dataset/NIPR-Valid-Lines-of-Authority-List/wk5a-kdpd/data
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	https://portal.cms.gov
Issuer and Direct Enrollment Partner Directory	List of approved, participating issuers and web-brokers includes entities that offer online resources for agents and brokers, such as direct enrollment and client management functionality	https://data.healthcare.gov/issuer-partner-lookup
LinkedIn® for Marketplace Agents and Brokers	Contains posts with announcements, new resources, upcoming webinars, and more information for Marketplace agents and brokers	https://www.linkedin.com/showcase/cms-ab
Assisting Clients with Marketplace Eligibility Appeals	Reviews the Marketplace eligibility appeal process and describes consumers' rights to appeal a Marketplace eligibility determination	http://cbt.regtap.info/cbt/regtap/AB_MarketplaceEligibilityAppeals_CBT_5CR_061119/story_html5.html

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	http://go.cms.gov/CCIIOAB
HealthCare.gov	Official site of the Health Insurance Marketplace; used for researching health coverage choices, eligibility, and enrollment	https://www.healthcare.gov/
Marketplace Information	Official Marketplace information source for assisters and outreach partners about Marketplace eligibility, financial assistance, enrollment, and more	https://marketplace.cms.gov
Agent and Broker Video Learning Center	Official Health Insurance Marketplace video learning center for agents and brokers.	https://www.cms.gov/CCIIO/Programs-and-Initiatives/Health-Insurance-Marketplaces/Video-Learning-Center

Acronym Definitions

Acronym	Definition
CCIIO	Center for Consumer Information and Insurance Oversight
CEU	Continuing Education Unit
CMS	Centers for Medicare & Medicaid Services
IDM	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