

# Plan Year 2019 Health Insurance Marketplace Registration and Training for Returning Agents and Brokers



1/8 | Exit >

Welcome to the  
**INTRODUCTION TO  
MARKETPLACE TRAINING  
FOR RETURNING  
AGENTS AND BROKERS**  
Module

Health Insurance Marketplace

Health Insurance Marketplace  
Plan Year 2019

Help Glossary Job Aids

[Text Description of Image or Animation](#)

< B > N

The screenshot shows a presentation slide with a blue background and a hexagonal pattern. On the left, there is a text box with the title 'Welcome to the INTRODUCTION TO MARKETPLACE TRAINING FOR RETURNING AGENTS AND BROKERS Module'. In the center, there are three overlapping hexagonal images: the top one shows a smiling woman in a red top, the middle one shows a group of four people in business attire, and the bottom one shows hands typing on a laptop. At the bottom of the slide, there is a navigation bar with icons for 'Help', 'Glossary', and 'Job Aids', a text box for 'Text Description of Image or Animation', and navigation arrows labeled '< B > N'. The CMS logo is visible in the bottom left corner of the slide.

*July 2018*

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

# Intended Audience

- The intended audience for this presentation is agents and brokers who successfully completed plan year 2018 Marketplace registration and training and are returning for plan year 2019.
- Agents and brokers who participated in a previous plan year, but did NOT complete plan year 2018 Marketplace registration and training are not eligible for “What's New for Returning Agents and Brokers” training and must complete the full Individual Marketplace training for plan year 2019.

# 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 learners 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 (SBMs) that do not use HealthCare.gov for eligibility and enrollment. Please review the guidance on our Agents and Brokers Resources webpage (<http://go.cms.gov/CCIIOAB>) and [Marketplace.CMS.gov](http://Marketplace.CMS.gov) to learn more.*

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

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

# Agenda

- Small Business Health Options Program (SHOP)
- Changes for Plan Year 2019
- Marketplace Registration and Training
- Compliance Points to Remember
- Help Desk and Call Center Support
- Agent and Broker Resources



# Plan Year 2019 Health Insurance Marketplace Registration and Training for Returning Agents and Brokers

**S** Small Business

**H** Health

**O** Options

**P** Program

*Small Business  
Health Options  
Program (SHOP)*

# Agent and Broker Registration to Participate in the SHOP

It takes only a few minutes to register for the SHOP.

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

- **Must** create an account and complete identity proofing through the CMS Enterprise Portal.
- **Must** execute the SHOP Privacy and Security Agreement in the Marketplace Learning Management System (MLMS).
- **May** complete the SHOP training (Recommended but not required).

Agents and brokers who complete Marketplace registration are searchable by small employers through the [Find Local Help](#) tool at HealthCare.gov.

# Recent Changes to the SHOP

- The way in which small groups enroll in SHOP coverage has changed, based on the 2019 Payment Notice final rule.\*
- Continue to use the tools and resources available on HealthCare.gov to help clients choose a SHOP plan.
- Enroll clients in SHOP plans through issuer(s) that have SHOP plan(s) of interest.

\*The Patient Protection and Affordable Care Act (PPACA) Department of Health & Human Services (HHS) Notice of Benefit and Payment Parameters for 2019 (2019 Payment Notice) final rule is available at <https://federalregister.gov/d/2018-07355>.

# Recent Changes to the SHOP (Continued)

Agent/Broker Function	What's New?
Window Shopping	No change from current operations; Use the <a href="#">See Plans and Prices tool</a> available at HealthCare.gov.
Eligibility Determination	Use the new <a href="#">SHOP Eligibility Determination tool</a> at HealthCare.gov.
Enrollment	Use the enrollment channels of the SHOP issuer or participating web-broker, not HealthCare.gov, to enroll SHOP groups.
Payments	Payments should be made to the issuer.
Renewal Notices	Existing SHOP groups will receive a renewal notice from the issuer reminding them to renew for 2019.
Account Updates	Maintain and manage accounts through the issuer, not HealthCare.gov.
Questions About Account	The SHOP Call Center is available for general questions regarding the SHOP. All other questions should go to the issuer.



# Assisting Employer Clients to Enroll in SHOP Coverage

- After you complete Marketplace registration to participate in the SHOP, you may help small employers through the SHOP application and enrollment process.
- Use the [See Plans and Prices tool](#) on HealthCare.gov to help your client compare coverage options
- Review price estimates for all the SHOP plans offered in the employer's area.

The screenshot displays the HealthCare.gov interface for comparing 2018 health insurance plans. The top navigation bar includes the HealthCare.gov logo, a language selector for 'ESPAÑOL', and a 'Log In' link. The main heading is '2018 health insurance plans & prices'. Below this, there is a prompt: 'Have fewer than 25 FTE's? A tax credit may put money back in your pocket.' with a button 'ADD ADDITIONAL PEOPLE'. The filter section shows '3 plans available', 'PLAN TYPE' set to 'Health plans', and 'SORT BY' set to 'Premium', with a 'REFINE RESULTS' button. Two plan cards are visible:

**SummaCare - SummaCare Bronze 5500 HSA-18 With SCSelect Network**  
Bronze | PPO | Plan ID: 52864OH1500104

Estimated monthly premium	Deductible	Out-of-pocket maximum	Copayments / Coinsurance
\$1,787.19	\$5,500 Family Per Person	\$6,550 Family Per Person	Emergency room care: 20% Coinsurance after deductible Generic drugs: 20% Coinsurance after deductible Primary doctor: 20% Coinsurance after deductible Specialist doctor: 20% Coinsurance after deductible
	\$11,000 Family Total	\$13,100 Family Total	
	\$5,500 Individual Total	\$6,550 Individual Total	

Buttons: QUICK VIEW, DETAILS, COMPARE, LIKE THIS PLAN

**SummaCare - SummaCare Silver 5000-18 With SCSelect Network**  
Silver | PPO | Plan ID: 52864OH1490728

Estimated monthly premium	Deductible	Out-of-pocket maximum	Copayments / Coinsurance
\$2,128.01	\$5,000 Family Per Person	\$7,000 Family Per Person	Emergency room care: \$300 Generic drugs: \$15 Primary doctor: \$30 Specialist doctor: \$50
	\$10,000 Family Total	\$14,000 Family Total	
	\$5,000 Individual Total	\$7,000 Individual Total	

Buttons: QUICK VIEW, DETAILS, COMPARE, LIKE THIS PLAN

# Assisting Employer Clients to Enroll in SHOP Coverage (Continued)

- Small employers must obtain an eligibility determination using the new [SHOP Eligibility Determination tool](#) at HealthCare.gov.
- They must:
  - Answer a few quick questions, like whether they are looking for health benefits or dental benefits, and
  - Select the state or states where the small employer's principal business address or eligible employee worksites are located.
- Once the employer finds a plan or plans in which it would like to enroll, assist the employer in contacting the participating issuer or issuers to enroll.

The screenshot shows the 'SHOP Eligibility Determination Form' interface. At the top, it says 'CENTERS FOR MEDICARE & MEDICAID SERVICES'. The main heading is 'SHOP Eligibility Determination Form'. Below this, there is a button labeled 'Start' with a right-pointing arrow. Underneath the button, there is a link: 'View a previous submission or resume a draft'. Below that, there is a 'SHARE THIS' section with icons for Facebook, Twitter, LinkedIn, and Google+. The main body of the form contains the following text: 'Get a SHOP eligibility determination here.' followed by 'To be eligible to enroll in health insurance through the Small Business Health Options Program (SHOP), your small business or non-profit organization must:'. There are four bullet points: 'Have a primary business address in the state where you're buying coverage.', 'Have at least one employee enrolling in coverage who isn't the owner, business partner, or spouse of the owner or business partner.', 'Have from 1 to 50 full-time equivalent (FTE) employees.', and 'Offer SHOP coverage to all full-time employees.'. At the bottom, it says 'This form will determine your eligibility for SHOP.'

# Employee Choice in the SHOP

- Employers in all states are able to offer their employees a choice of a single health and/or dental plan or all health and/or dental plans at a single metal level of coverage.
- Employers in some states can also offer their employees a choice of health and/or dental plans by insurance company (vertical choice). This allows employers to offer coverage options at different metal levels to their employees from a single insurance company.

## Vertical Choice (Employee Choice by Insurance Company) States

Alabama	Iowa	Nebraska	South Dakota
Alaska	Kansas	Nevada	Tennessee
Arizona	Kentucky	New Hampshire	Texas
Delaware	Louisiana	North Carolina	Utah
Florida	Maine	North Dakota	Virginia
Georgia	Mississippi	Ohio	West Virginia
Illinois	Missouri	Oklahoma	Wisconsin
Indiana	Montana	South Carolina	Wyoming

Note: Michigan, New Jersey, and Pennsylvania have opted out of vertical choice for 2019.

# Employee Choice in the SHOP (Continued)

- Employers that offer their employees a choice of plans in the SHOP can work with you or their issuer(s) to collect the information necessary to offer and enroll their employees in multiple plans.
- Employers are responsible for coordinating payments among issuers.
- Employers must meet the [Minimum Participation Rate \(MPR\)](#) requirement for their state at the group level, unless the group enrolls between November 15-December 15 when the MPR provision does not apply.
  - An employer's MPR will be calculated at the group level.
  - Issuers will not be permitted to deny enrollment into a SHOP plan if the group has met the MPR at the group level and/or if the group enrolls in a SHOP plan between November 15-December 15.

# Calculating the Minimum Participation Rate

- An employer's MPR is calculated at the employer level. For plan years 2018 and beyond, SHOPs are no longer the entity calculating the MPR.
- Participating qualified health plan (QHP) issuers are not permitted to deny enrollment on the basis of failure to meet participation requirements to employers who have been determined eligible to participate in the SHOP, and who have met the applicable MPR, as specified by the SHOP, even if only one employee in a group wishes to enroll with a particular issuer.
- The annual window in which employers do not need to meet any MPR in order to enroll in a SHOP QHP spans from November 15 - December 15.

The equation for calculating minimum participation is:  
MPR = Number of Full-time Employees Enrolling in Qualified Coverage  
DIVIDED BY  
Number of Full-Time Employees Offered SHOP Coverage

# SHOP Tools at HealthCare.gov

Tool	Functionality & Value
<a href="#">See Plans and Prices</a> ( <a href="#">Spanish Version</a> )	Help clients browse SHOP health and dental plans available in their area. Premium estimates are based on age and geographic location.
<a href="#">Full Time Equivalent (FTE) Employee Calculator</a> ( <a href="#">Spanish Version</a> )	Help clients determine if they may be eligible for SHOP coverage by counting their total number of full-time and FTE employees.
<a href="#">Tax Credit Estimator</a> ( <a href="#">Spanish Version</a> )	Help employers estimate if they may be eligible for the Small Business Health Care Tax Credit, and estimate how much the tax credit may be worth to them.
<a href="#">MPR Calculator</a> ( <a href="#">Spanish Version</a> )	Help employers predict if they will meet the MPR required to enroll in SHOP.

# SHOP Resources

- Visit the [HealthCare.gov small business page](#) to learn more about SHOP and use tools to help your clients enroll in SHOP coverage.
- Find SHOP resources, fact sheets, and user guides [here](#).
- Contact the SHOP Call Center at 1-800-706-7893 (TTY: 711).



# Plan Year 2019 Health Insurance Marketplace Registration and Training for Returning Agents and Brokers



*Changes for Plan  
Year 2019*



# System Enhancements for Plan Year 2019

## Marketplace Learning Management System (MLMS) Profile

- Updated options for how contact information will be displayed in Find Local Help and Help On Demand to give you a better user experience and make correct choices

**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.	

- Added address validation to allow you to identify and correct any errors when first entering your profile address, thus reducing issues with the address listed in Find Local Help (see this [tip sheet](#) for guidance to resolve an invalid MLMS profile address)

# System Enhancements for Plan Year 2019 (Continued)

## Consumer-Facing Find Local Help Search Results

- New badge shows consumers the number of years you have been registered with the Marketplace

The screenshot displays a search result for an agent or broker. At the top, a dark blue header reads 'AGENT OR BROKER'. Below this, the name '1. John Doe' is listed. A blue badge with white text indicates '3rd YEAR OF SERVICE', with a red arrow pointing to it from the right. To the right of the name, contact information is provided: PHONE (012) 345 6789, EMAIL John.Doe@email.com, WEBSITE JohnDoe.com, and ADDRESS 4715 Rosebud Avenue, Grady, AR 71644. At the bottom left, there is a 'Download contact' button, and at the bottom right, there is a 'More details' button.

## New Tool: Agent and Broker Registration Status Tracker

- Will display your training completion, license status, and registration status, thus reducing registration-related Help Desk inquiries

## CMS-approved Vendor Training Curriculum

- One vendor, America's Health Insurance Plans (AHIP), is approved to offer Individual Marketplace training for plan year 2019.
- The SHOP curriculum is not available through the CMS-approved vendor.

# Policy Changes for Plan Year 2019

As part of the Marketplace Training for Returning Agents and Brokers, you will learn about key policy changes impacting the Health Insurance Marketplace.



2018 health insurance plans & prices

People covered: Primary (Age 36), Spouse (Age 36) and 1 Dependent with estimated tax credit (not your premium) of \$434.04 per month

Compare Plans

Plan Name	Estimated monthly premium	Deductible	Out-of-pocket maximum
Molina Marketplace - Molina Marketplace Choice Bronze Plan	\$246.70	\$6,400	\$7,350
Community Health Choice - Community Health Choice HMO Bronze 003	\$426.46	\$6,000	\$7,350
Ambetter From Superior HealthPlan - Ambetter Essential Care 1 (2018)	\$469.28	\$6,800	\$6,800

## *Impact of Tax Legislation on the Individual Shared Responsibility Requirement and Exemptions*

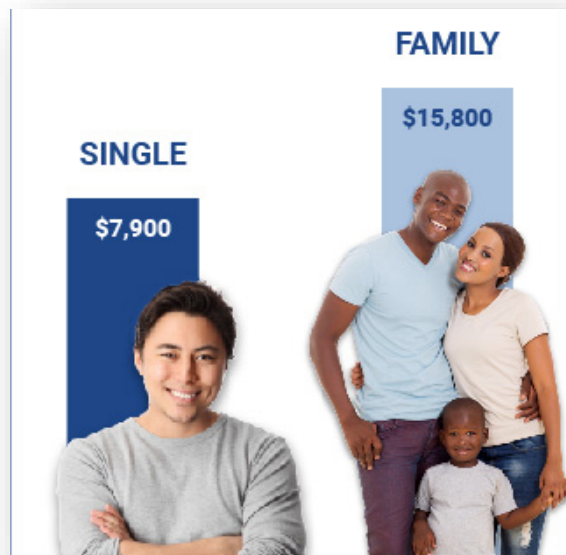
- The IRS has not issued guidance on the individual shared responsibility requirement for tax year 2019.
- CMS will share information on this topic with Marketplace agents and brokers as it becomes available.

## *Elimination of Standardized Options for QHPs*

- The Marketplace did not establish standardized benefit design options for the 2019 benefit year.
- For the 2019 benefit year, HealthCare.gov will not provide differential display of standardized plans and third-party websites are not required to provide differential display of these plans.

# Policy Changes for Plan Year 2019 (Continued)

*As part of the Marketplace Training for Returning Agents and Brokers, you will learn about key policy changes impacting the Health Insurance Marketplace.*



## *Annual Cost-Sharing Limits for 2019*

- The maximum out-of-pocket cost limits have been increased to \$7,900 for an individual and \$15,800 for families enrolled in non-grandfathered individual or group market plans.

## *Enhanced Direct Enrollment Pathway*

- CMS is implementing an optional program to allow approved issuers and web-brokers to host application and enrollment services on their own websites without the secure redirect to and from HealthCare.gov.



# Plan Year 2019 Health Insurance Marketplace Registration and Training for Returning Agents and Brokers

## My Access

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

### Plan Year 2019

#### Agent Broker Registration Status

Please click the link below next to items marked 'INCOMPLETE' to register as an agent/broker for the 2018 plan year. If your status is not accurate, please log out and log back in to complete registration.

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

0%  100%

We are in the process of updating your records and granting you the Agent Broker Role. Please stay on this page for 16.0 seconds.

## *Marketplace Registration and Training*

# Registration and Training For Returning Agents and Brokers

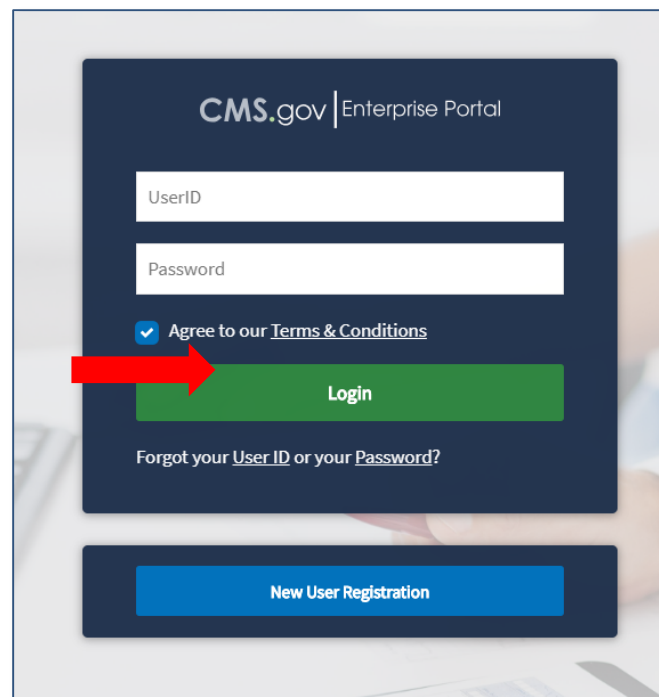
To participate in the Marketplace for plan year 2019, you must complete the following actions:

1. Update your agent/broker profile on the MLMS via the CMS Enterprise Portal.
2. Complete the 30-minute Marketplace training on the MLMS or through a CMS-approved vendor via the CMS Enterprise Portal.
3. Read and accept the applicable Marketplace Agreement(s) on the MLMS.
4. Confirm completion of all registration steps by logging back in to the “Agent/Broker Registration Status” page on the CMS Enterprise Portal and printing your completion certificate.

*For a printable tip sheet with information on these steps, please see the [Returning Agents' and Brokers' Guide to Plan Year 2019 Marketplace Registration and Training](#) resource on the [Agents and Brokers Resources webpage](#).*

# Step 1: Returning Agent or Broker Updates MLMS Profile

- Registration for plan year 2019 is available through the [CMS Enterprise Portal](#).
- As a returning agent or broker, you must log in and update your profile on the MLMS.
  - Because you have participated in a previous plan year, you already have a CMS Enterprise Portal account and should not create a new one.
  - If you do not remember your 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.



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

# Step 1: Returning Agent or Broker Updates MLMS Profile (Continued)

- To update your MLMS profile and access both the CMS-developed training and training offered through a CMS-approved vendor, select the “Complete Agent Broker Training” link on the “Agent Broker Registration Status” page.

Agent Broker Registration Status

**Plan Year 2019**

Please click the link below next to items marked 'INCOMPLETE' to register as an agent/broker for the 2018 plan year. If you have completed steps 1 and 2 below, Registration Complete should display at the bottom of the page. If your status is not accurate, please log out and log back in later. During busy periods, it may take 30 minutes or longer to finalize registration.

We are experiencing technical difficulties and cannot retrieve your latest training status. If you have completed training and it is not reflected below, please return to this page in the future to confirm your status has been updated. You may still complete identity proofing and any training you have not completed.

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

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



# Step 1: Returning Agent or Broker Updates MLMS Profile (Continued)

- To access your MLMS profile and CMS-developed training, select the “Access Training” link next to the “Marketplace Learning Management System (CMS)” option on the “Agent/Broker Training Options” page.
- This is also the page where you may access training via the CMS-approved vendor, AHIP.

**Plan Year 2019 Agent/Broker Training Options**

Agents and brokers have new options to complete Individual Marketplace and/or SHOP training for the 2019 plan year. These include a third-party vendor. Third-party vendor training may be approved for continuing education units (CEUs). Select “Learn More” next to each vendor’s listing to obtain information about pricing and CEUs. Please contact the vendor for more information, or if you are having difficulty accessing the vendor’s site.

CMS continues to offer training at no charge through its Marketplace Learning Management System (MLMS), but no CEUs are available through the MLMS.

○ America’s Health Insurance Plans	<a href="#">Learn More</a>	<a href="#">Access Training</a>
○ Marketplace Learning Management System (CMS)	<a href="#">Access Training</a>	<a href="mailto:MLMSHelpDesk@cms.hhs.gov">MLMSHelpDesk@cms.hhs.gov</a>

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

# Step 1: Returning Agent or Broker Updates MLMS Profile (Continued)

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

Portal Help & FAQs Print Log Out z Text Size (+) (-)

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

I am a:

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

**Business Profile**

Street Address \*

City \*

State \*

Zip Code \*

Phone \*

Email \*

URL

National Producer Number \*

Confirm NPN \*

Preferred method of contact \*

Preferred Language

**Hours of Operation**

From \*

To \*

Time Zone \*

Work Days \*  Monday  Tuesday  Wednesday  Thursday  Friday  Saturday  Sunday

**Business Entity Profile**

**Web-Based Entity Profile**

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

Save

# Step 1: Returning Agent or Broker Updates MLMS Profile (Continued)

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

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

I am :

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

Business Profile

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

Save

# Step 1: Returning Agent or Broker Updates MLMS Profile (Continued)

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

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

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

Find Local Help and Help On Demand options

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

-Select One-

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

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

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

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

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

\*\* Help On Demand is a consumer assistance service, provided by BigWave Systems, that connects consumers seeking assistance with Marketplace-registered, state-licensed agents and brokers in their area who can provide assistance with Marketplace plans and enrollments while the consumer is available.

# Step 1: Returning Agent or Broker Updates MLMS Profile (Continued)

- If you also act as the authorized representative for a web-broker or other business entity, you can add the web-broker's or business entity's National Producer Number (NPN) by selecting the appropriate "+" link at the bottom of the profile page.
- You can list up to three NPNs in your MLMS profile.

The screenshot displays a web form for updating a profile. The form includes the following fields and options:

- Phone \*: 3014608038
- Email \*: jjones001@gmail.com
- URL: (empty)
- National Producer Number \*: 23456
- Confirm NPN \*: 23456
- Preferred method of contact \*: Email address (dropdown)
- Preferred Language: English (dropdown)
- Hours of Operation section:
  - From \*: 09:00 AM (dropdown)
  - To \*: 04:00 PM (dropdown)
  - Time Zone\*: Eastern Time (EST) (dropdown)
- Work Days: Monday  Tuesday  Wednesday  Thursday  Friday  Saturday  Sunday
- Business Entity Profile (highlighted with a red box)
- Web-Based Entity Profile

At the bottom of the form, there are two instructions and buttons:

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

# Step 1: Returning Agent or Broker Updates MLMS Profile (Continued)

- Enter the information for the web-broker or business entity with which you are affiliated.
- If you list the web-broker's or other business entity's NPN, once you have completed registration, the registration for the additional NPNs you listed will also be complete.

**Business Entity Profile**

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

Business Entity Name \*

Business Entity Street Address \*

Business Entity City \*

Business Entity State \*

Business Entity Zip Code \*

Business Entity Phone \*

Business Entity Email \*

Business Entity URL

Business Entity National Producer Number (NPN) \*

Confirm NPN \*

# Step 1: Returning Agent or Broker Updates MLMS Profile (Continued)

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

Phone \* 3014608038

Email \* jjones001@gmail.com

URL

National Producer Number \* 23456

Confirm NPN \* 23456

Preferred method of contact: \* Email address

Preferred Language English

**Hours of Operation**

From \* 09:00 AM

To \* 04:00 PM

Time Zone\* Eastern Time (EST)

Work Days \*  Monday  Tuesday  Wednesday  Thursday  Friday  Saturday  Sunday

Business Entity Profile

Web-Based Entity Profile

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

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

Save

Next

# Step 1: Returning Agent or Broker Updates MLMS Profile (Continued)

You must enter a correct NPN in your MLMS profile to receive credit for completing Marketplace registration.

- The NPN can be up to 10 digits long and must not begin with a zero.
- The NPN must not include any special characters or letters.
- The NPN is generally not the same as your state license number. Be sure to use your NPN, not a state license number.
- To update the NPN, you can select the “Complete Agent Broker Training” hyperlink and update the information in your MLMS profile.
- Agent and broker NPNs can be found at [www.nipr.com/PacNpnSearch.htm](http://www.nipr.com/PacNpnSearch.htm).

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



# Registration and Training For Returning Agents and Brokers

To participate in the Marketplace for plan year 2019, you must complete the following actions:

1. Update your agent/broker profile on the MLMS via the CMS Enterprise Portal.
2. Complete the 30-minute Marketplace training on the MLMS or through a CMS-approved vendor via the CMS Enterprise Portal.
3. Read and accept the applicable Marketplace Agreement(s) on the MLMS.
4. Confirm completion of all registration steps by logging back in to the “Agent/Broker Registration Status” page on the CMS Enterprise Portal and printing your completion certificate.

*For a printable tip sheet with information on these steps, please see the [Returning Agents' and Brokers' Guide to Plan Year 2019 Marketplace Registration and Training](#) resource on the [Agents and Brokers Resources webpage](#).*

# Step 2: Returning Agent or Broker Completes Training

- Returning Individual Marketplace agents and brokers are eligible to take a condensed training (Marketplace Training for Returning Agents and Brokers) to complete the Individual Marketplace training requirement.\*
- The required portion of Marketplace Training for Returning Agents and Brokers takes approximately one half hour to complete.
- Returning agents and brokers will be automatically enrolled in Marketplace Training for Returning Agents and Brokers, but can enroll in additional curricula, such as SHOP training or the full Individual Marketplace training, as desired.



*\* Training is only required for participation in the Individual Marketplace. If you participate in the SHOP you are encouraged, but not required, to take SHOP training.*

## Step 2: Returning Agent or Broker Completes Training (Continued)

The curriculum for the Marketplace Training for Returning Agents and Brokers consists of two required training modules, one exam, and three optional review modules.

### *Required*

- Introduction to Marketplace Training for Returning Agents and Brokers
- What's New for Returning Agents and Brokers
- Returning Agents and Brokers What's New Exam\*

### *Optional*

- Basics Review for Returning Agents and Brokers
- Individual Marketplace Review for Returning Agents and Brokers
- Privacy and Security Review for Returning Agents and Brokers

*\* You must score at least a 70 percent to pass the exam.*

# Step 2: Returning Agent or Broker Completes Training (Continued)

- To ensure you are eligible for Marketplace Training for Returning Agents and Brokers, confirm that your NPN appears on the [Agent and Broker FFM Registration Completion List \(RCL\)](#) for plan year 2018.
- If you believe you completed the plan year 2018 registration and training process, but do not find your name on the RCL, send an email to [FFMProducer-AssisterHelpDesk@cms.hhs.gov](mailto:FFMProducer-AssisterHelpDesk@cms.hhs.gov) for additional assistance.

**Data.HealthCare.gov** | [Sign In to Data.HealthCare.gov](#)

**FFM Agent Broker Registration and Termination Status Page**

**Agent and Broker FFM Registration Completion List**

**Registration Completion List Disclaimer**

The Centers for Medicare & Medicaid Services (CMS) is making the Agent and Broker Federally-facilitated Marketplace (FFM) Registration Completion List available to the public on a monthly basis pursuant to Section 1312(e) of the Affordable Care Act and 45 C.F.R. §155.220, and Routine Use No. 11 of the System of Records Notice required by the Privacy Act of 1974 (5 U.S.C. §552a), titled, "Health Insurance Exchanges (HIX) Program" (No. 09-70-0560), published at 78 Fed. Reg. 6,538 (February 6, 2013), as amended and published at 78 Fed. Reg. 32,256 (May 29, 2013), and at 78 Fed. Reg. 63,211 (October 23, 2013). The information within the Agent and Broker List may be used only for the following purposes:

1. To confirm that an agent or broker has successfully completed registration requirements for the FFM or State-based Marketplace on the Federal Platform (SBM-FP) for the Individual Marketplace and/or the Small Business Health Options Program Marketplace (SHOP); and
2. To allow states and other stakeholders to conduct oversight, monitoring and enforcement activities related to agents and brokers, and to educate consumers about agents and brokers who may provide assistance to consumer who are interested in obtaining health care coverage through the FFM or SBM-FP in their states.

The information contained in the Agent and Broker FFM Registration Completion List (RCL) may be used and/or disclosed only to the extent necessary to accomplish these purposes and never to discriminate inappropriately.

For the current plan year, the agent and broker FFM RCL has a NPN Validation column. The indicator in the NPN Validation column is a check that occurs on the National Insurance Producer Registry (NIPR <http://www.nipr.com/>) database. A valid National Producer Number (NPN) and an active licensure status in a healthcare related line of authority are required to receive a "Y" for successful validation. If an agent or broker has an inquiry regarding their licensure status, the inquiry should be routed to NIPR customer service ([http://www.nipr.com/index\\_contacts.htm](http://www.nipr.com/index_contacts.htm)). If the agent or broker's NPN does not match licensure records on NIPR, download the Fair Credit Reporting Act form at [http://www.nipr.com/index\\_fair\\_credit\\_reporting\\_act.htm](http://www.nipr.com/index_fair_credit_reporting_act.htm) and submit your dispute.

For a list of qualifying healthcare related lines of authority or if the agent or broker's NPN is valid in NIPR and has an active status however, does not have a "Y" in the current year NPN Validation column please contact FFM Producers and Assistants Email Help Desk at [FFMProducer-AssisterHelpDesk@cms.hhs.gov](mailto:FFMProducer-AssisterHelpDesk@cms.hhs.gov).

Agents and brokers that complete registration before the expiration date of the previous plan year are allowed to sell prior plan year health plans during Special Enrollment Periods (SEPs). This only applies to agents and brokers who have not otherwise completed registration for the previous plan year. Agents and brokers that fall within this scenario will appear with registration completions for two consecutive plan years each having the same registration completion date. Please reference the agreement and expiration dates for each plan year below.

- Plan Year 2014 FFM registration and CMS agreements became available 8/30/2013 and expired 9/30/2014
- Plan Year 2015 FFM registration and CMS agreements became available 7/7/2014 and expired 11/12/2015
- Plan Year 2016 FFM registration and CMS agreements became available 9/15/2015 and expire 10/31/2016
- Plan Year 2017 FFM registration and CMS agreements became available 8/1/2016 and expire 10/31/2017

[Access Agent and Broker FFM Registration Completion List](#)

# Step 2: Returning Agent or Broker Completes Training (Continued)

You have two options for training via the CMS Enterprise Portal:

- CMS-developed training through the MLMS (Individual Marketplace and SHOP)
- Training offered through the CMS-approved vendor, AHIP (Individual Marketplace only\*)

## Plan Year 2019 Agent/Broker Training Options

Agents and brokers have new options to complete Individual Marketplace and/or SHOP training for the 2019 plan year. These include a third-party vendor. Third-party vendor training may be approved for continuing education units (CEUs). Select “Learn More” next to each vendor’s listing to obtain information about pricing and CEUs. Please contact the vendor for more information, or if you are having difficulty accessing the vendor’s site.

CMS continues to offer training at no charge through its Marketplace Learning Management System (MLMS), but no CEUs are available through the MLMS.

- America’s Health Insurance Plans [Learn More](#) [Access Training](#)
- Marketplace Learning Management System (CMS) [Access Training](#) [MLMSHelpDesk@cms.hhs.gov](mailto:MLMSHelpDesk@cms.hhs.gov)

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

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

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

## Step 2: Returning Agent or Broker Completes Training (Continued)

- In addition to the MLMS, AHIP is approved to offer Individual Marketplace training for plan year 2019.\*
- AHIP is required to offer continuing education units (CEUs) in a minimum of five states where the Marketplace operates (45 CFR § 155.222).
  - You can use these CEUs to meet state licensure requirements for continuing education.
  - For more information on individual state CEU requirements, check with your state's Department of Insurance.
  - The list of states where AHIP offers CEUs is available on the CMS Enterprise Portal "Agent/Broker Training Options" page by selecting AHIP's "Learn More" link.



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

## Step 2: Returning Agent or Broker Completes Training (Continued)



- AHIP charges a fee to take its training.
- Fees for plan year 2019 will range from \$20-\$55 depending on the curriculum completed, and CEUs are available at an additional fee.

# Step 2: Returning Agent or Broker Completes Training (Continued)

- If you chose to complete training through the CMS-approved vendor, AHIP, you must access AHIP's training via the CMS Enterprise Portal. You cannot go directly to AHIP's website to access the training content.
- Select the "Access Training" link for AHIP, and the CMS Enterprise Portal will redirect you to the AHIP website.

**Plan Year 2019 Agent/Broker Training Options**

Agents and brokers have new options to complete Individual Marketplace and/or SHOP training for the 2019 plan year. These include a third-party vendor. Third-party vendor training may be approved for continuing education units (CEUs). Select "Learn More" next to each vendor's listing to obtain information about pricing and CEUs. Please contact the vendor for more information, or if you are having difficulty accessing the vendor's site.

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



## Step 2: Returning Agent or Broker Completes Training (Continued)

Once you complete training through the CMS-approved vendor, you will be directed to log back in to the CMS Enterprise Portal to complete registration, including signing the applicable Agreement(s) on the MLMS (Step 3).

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

# Registration and Training For Returning Agents and Brokers

To participate in the Marketplace for plan year 2019, you must complete the following actions:

1. Update your agent/broker profile on the MLMS via the CMS Enterprise Portal.
2. Complete the 30-minute Marketplace training on the MLMS or through a CMS-approved vendor via the CMS Enterprise Portal.
3. Read and accept the applicable Marketplace Agreement(s) on the MLMS.
4. Confirm completion of all registration steps by logging back in to the “Agent/Broker Registration Status” page on the CMS Enterprise Portal and printing your completion certificate.

*For a printable tip sheet with information on these steps, please see the [Returning Agents' and Brokers' Guide to Plan Year 2019 Marketplace Registration and Training](#) resource on the [Agents and Brokers Resources webpage](#).*

# Step 3: Returning Agent or Broker Executes 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 update your MLMS profile information and complete the required training and exams before you can sign the Agreement(s).



# Registration and Training For Returning Agents and Brokers

To participate in the Marketplace for plan year 2019, you must complete the following actions:

1. Update your agent/broker profile on the MLMS via the CMS Enterprise Portal.
2. Complete the 30-minute Marketplace training on the MLMS or through a CMS-approved vendor via the CMS Enterprise Portal.
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# Step 4: Returning Agent or Broker Confirms Completion on the Agent/Broker Registration Status Page

- After you have executed the Agreement(s), you will be redirected back to the “Agent Broker Registration Status” page on the CMS Enterprise Portal.
  - To ensure the system completes the update of your records, wait for the progress bar to complete to 100 percent before logging out of the system.
- Once you have been redirected, you should review the “Agent Broker Registration Status” page to confirm you have completed all registration steps.

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

## My Access

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

### Plan Year 2019

#### Agent Broker Registration Status

Please click the link below next to items marked 'INCOMPLETE' to register as an agent/broker for the 2018 plan year. If you have completed steps 1 and 2 below, Registration Complete should display at the bottom of the page. If your status is not accurate, please log out and log back in later. During busy periods, it may take 30 minutes or longer to finalize registration.

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

0% 100%

We are in the process of updating your records and granting you the Agent Broker Role. Please stay on this page until this process is complete. This page will automatically refresh in 16.0 seconds.

# Step 4: Returning Agent or Broker Confirms Completion on the Agent/Broker Registration Status Page (Continued)

- You will be redirected to the MLMS Landing Page, where you can select the “Print your Registration Completion Certificate” link.
- Your Registration Completion Certificate will include:
  - Your name
  - Your NPN(s)
  - The market segment(s) for the certificate
  - The plan year for the certificate
  - The date you completed FFM registration



The issuer(s) that you are affiliated with may request to view your Registration Completion Certificate(s). However, issuers are instructed to review the [RCL](#) to confirm the registration status of agents and brokers.

# Step 4: Returning Agent or Broker Confirms Completion on the Agent/Broker Registration Status Page (Continued)

- You should also confirm that your information appears on the [RCL](#).
- Your information may take one to two business days to appear on the RCL after completing all registration and training steps. It may take up to three business days to appear on Find Local Help.
- If your NPN does not appear for plan year 2019, send an email to: [FFMProducer-AssisterHelpDesk@cms.hhs.gov](mailto:FFMProducer-AssisterHelpDesk@cms.hhs.gov) for assistance.

**Data.HealthCare.gov** [Sign In to Data.HealthCare.gov](#)

## FFM Agent Broker Registration and Termination Status Page

### Agent and Broker FFM Registration Completion List

**Registration Completion List Disclaimer**

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For a list of qualifying healthcare related lines of authority or if the agent or broker's NPN is valid in NIPR and has an active status however, does not have a "Y" in the current year NPN Validation column please contact FFM Producers and Assistants Email Help Desk at [FFMProducer-AssisterHelpDesk@cms.hhs.gov](mailto:FFMProducer-AssisterHelpDesk@cms.hhs.gov).

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- Plan Year 2017 FFM registration and CMS agreements became available 8/1/2016 and expire 10/31/2017

[Access Agent and Broker FFM Registration Completion List](#)

# Plan Year 2019 Health Insurance Marketplace Registration and Training for Returning Agents and Brokers



*Compliance Points  
to Remember*



# Marketplace Agent and Broker Compliance Points to Remember



- Obtain consent from each client you work with prior to assisting him or her. While written consent is not required, it helps to resolve compensation issues if consumers later claim they did not authorize you to help them.
- Obtaining a signed Broker of Record form from an issuer or state Department of Insurance satisfies the consumer consent requirement.
- Do not create or maintain access to a client's HealthCare.gov account or associated email account.
- Do not create or use dummy addresses in place of the consumer's email or mailing address.

# Marketplace Agent and Broker Compliance Points to Remember (Continued)

- You may not log in to HealthCare.gov on a consumer's behalf (i.e., using the consumer's HealthCare.gov credentials).
- If a client may be eligible for Medicare, direct him or her to Medicare for a determination before you assist that client to enroll in a Marketplace QHP.
- If you suspect or identify potential fraud, you can report it to the Department of Health & Human Services (HHS) [Office of Inspector General Hotline](#), the [Federal Trade Commission](#), or the [Agent/Broker Email Help Desk](#), depending on the situation.





# Plan Year 2019 Health Insurance Marketplace Registration and Training for Returning 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)
Marketplace Service Desk	855-CMS-1515 855-267-1515 <a href="mailto:CMS_FEPS@cms.hhs.gov">CMS_FEPS@cms.hhs.gov</a>	<ul style="list-style-type: none"> <li>• CMS Enterprise Portal password resets and account lockouts</li> <li>• Other CMS Enterprise Portal account issues or error messages</li> <li>• General registration and training questions</li> <li>• Login issues on the Direct Enrollment agent/broker landing page</li> </ul>	Mon-Fri 8:00 AM–8:00 PM ET
Agent/Broker Email Help Desk	<a href="mailto:FFMProducer-AssisterHelpDesk@cms.hhs.gov">FFMProducer-AssisterHelpDesk@cms.hhs.gov</a>	<ul style="list-style-type: none"> <li>• General enrollment and compensation questions</li> <li>• Manual identity proofing/Experian issues</li> <li>• Escalated general registration and training questions (not related to a specific training platform)</li> <li>• Agent/Broker Registration Completion List issues</li> <li>• Find Local Help listing issues</li> <li>• Help On Demand participation instructions or questions</li> <li>• Report concerns that a consumer or another agent or broker has engaged in fraud or abusive conduct</li> </ul>	Mon-Fri 8:00 AM–6:00 PM ET
Direct Agent/Broker Partner Line	855-788-6275 Note: Enter your NPN to access this line.	<ul style="list-style-type: none"> <li>• HealthCare.gov account password resets</li> <li>• Special enrollment periods not available on the consumer application</li> <li>• Individual Marketplace eligibility and enrollment issues</li> </ul>	Mon–Sun 24 hours/day
Agent/Broker Training and Registration Email Help Desk	<a href="mailto:MLMSHelpDesk@cms.hhs.gov">MLMSHelpDesk@cms.hhs.gov</a>	<ul style="list-style-type: none"> <li>• Technical or system-specific issues related to the MLMS</li> <li>• User-specific questions about maneuvering in the MLMS site, or accessing training and exams</li> </ul>	Mon–Fri 9:00 AM–5:30 PM ET

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

Help Desk Name	Phone # and/or Email Address	Types of Inquiries Handled	Hours (Closed Holidays)
SHOP Call Center	800-706-7893	<ul style="list-style-type: none"> <li>All inquiries related to the SHOP</li> <li>Employers and employees may also contact the SHOP Call Center for assistance.</li> </ul>	Mon-Fri 9:00 AM-5:00 PM ET
Direct Enrollment Email Help Desk	<a href="mailto:DirectEnrollment@cms.hhs.gov">DirectEnrollment@cms.hhs.gov</a>	<ul style="list-style-type: none"> <li>All inquiries specifically related to becoming and/or operating as a direct enrollment web-broker in the Marketplace</li> </ul>	Mon-Fri 9:00 AM-5:00 PM ET
America's Health Insurance Plans (AHIP) Training Help Desk	<a href="mailto:support@ahipinsuranceeducation.org">support@ahipinsuranceeducation.org</a>  800-984-8919	<ul style="list-style-type: none"> <li>All inquiries specifically related to the AHIP agent/broker training platform</li> </ul>	Mon-Fri 8:00 AM-7:00 PM ET  Sat 8:30 AM-5:00 PM ET

# Plan Year 2019 Health Insurance Marketplace Registration and Training for Returning Agents and Brokers



*Agent and Broker  
Resources*

# Agent and Broker Resources

Resource	Description	Link
Agent and Broker FFM Registration Completion List	Public list of agents and brokers who have completed Marketplace registration; used by issuers to verify your eligibility for compensation for assisting with consumer enrollments	<a href="https://data.healthcare.gov/ffm_ab_registration_lists">https://data.healthcare.gov/ffm_ab_registration_lists</a>
Find Local Help	Tool available on HealthCare.gov that enables consumers to search for a local, Marketplace-registered agent or broker with an active licensure status in a valid health-related line of authority to assist with FFM enrollment	<a href="https://localhelp.healthcare.gov/">https://localhelp.healthcare.gov/</a>
Help On Demand	Third-party service that connects consumers seeking assistance with Marketplace-registered, state-licensed agents and brokers in their area who can help with Marketplace enrollment when the consumer is available	<a href="https://www.cms.gov/CCIIO/Programs-and-Initiatives/Health-Insurance-Marketplaces/Downloads/Help-On-Demand.pdf">https://www.cms.gov/CCIIO/Programs-and-Initiatives/Health-Insurance-Marketplaces/Downloads/Help-On-Demand.pdf</a>
Agent and Broker NPN Search Tool	Provides a search function to determine the correct NPN to enter in your MLMS profile and on Marketplace applications	<a href="http://www.nipr.com/PacNpnSearch.htm">www.nipr.com/PacNpnSearch.htm</a>
List of Approved Health-related Lines of Authority	Provides a list of valid health-related lines of authority for agents and brokers	<a href="https://data.healthcare.gov/dataset/NIPR-Valid-Lines-of-Authority-List/wk5a-kdpd/data">https://data.healthcare.gov/dataset/NIPR-Valid-Lines-of-Authority-List/wk5a-kdpd/data</a>

# Agent and Broker Resources (Continued)

Resource	Description	Link
Agents and Brokers Resources webpage	Primary outlet for agents and brokers to receive information about working in the Health Insurance Marketplace; provides the latest news and resources, including newsletters, webinars, fact sheets, videos, and tip sheets	<a href="http://go.cms.gov/CCIIOAB">http://go.cms.gov/CCIIOAB</a>
HealthCare.gov	Official site of the Health Insurance Marketplace; used for researching health coverage choices, eligibility, and enrollment	<a href="https://www.healthcare.gov/">https://www.healthcare.gov/</a>
Marketplace Information	Official Marketplace information source for assisters and outreach partners about Marketplace eligibility, financial assistance, enrollment, and more	<a href="https://marketplace.cms.gov">https://marketplace.cms.gov</a>
CMS Enterprise Portal	Allows you to securely complete identity-proofing and access the MLMS to complete annual, required Marketplace agent and broker training and registration	<a href="https://portal.cms.gov">https://portal.cms.gov</a>
LinkedIn for Marketplace Agents and Brokers	Contains posts with announcements, new resources, upcoming webinars, and more information for Marketplace agents and brokers	<a href="https://www.linkedin.com/showcase/cms-ab">https://www.linkedin.com/showcase/cms-ab</a>



# Acronym Definitions

Acronym	Definition
AHIP	America's Health Insurance Plans
CCIIO	Center for Consumer Information and Insurance Oversight
CEU	Continuing Education Unit
CMS	Centers for Medicare & Medicaid Services
EIDM	Enterprise Identity Management
FFM	Federally-facilitated Marketplace
FTE	Full-time Equivalent
MLMS	Marketplace Learning Management System
MPR	Minimum Participation Rate

# Acronym Definitions (Continued)

Acronym	Definition
NPN	National Producer Number
QHP	Qualified Health Plan
RCL	Registration Completion List
SBM	State-based Marketplace
SBM-FP	State-based Marketplace on the Federal Platform
SHOP	Small Business Health Options Program

# Conclusion

