

Welcome to Plan Year 2023 Health Insurance Marketplace® Registration and Training for Returning Agents and Brokers

Health
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Centers for Medicare & Medicaid Services (CMS)
Center for Consumer Information & Insurance Oversight (CCIIO)
August 11, 2022



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. The contents of this document do not have the force and effect of law and are not meant to bind the public in any way, unless specifically incorporated into a contract. This document is intended only to provide clarity to the public regarding existing requirements under the law.

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 Agent and Broker 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 include Federally-facilitated Marketplaces (FFMs) and State-based Marketplaces on the Federal Platform (SBM-FPs).

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Agenda



| 01 Plan Year 2023 Health Insurance Marketplace® Registration and Training Process

| 02 Plan Year 2023 Health Insurance Marketplace® Updates

| 03 Agent and Broker Resources

| 04 Help Desk and Call Center Support

| 05 Helpful Updates and Upcoming Webinars

Intended Audience



- » The intended audience for this presentation is **agents and brokers who successfully completed Plan Year 2022 Marketplace registration and training** and are returning for Plan Year 2023. Returning agents and brokers are required to complete an abbreviated refresher training, pass an exam and execute the applicable Marketplace Agreements.
- » Agents and brokers who participated in a previous Plan Year but did NOT complete Plan Year 2022 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 2023.



**Plan Year 2023 Health Insurance
Marketplace® Registration and Training for
Returning Agents and Brokers**

Step 1: Update the Agent and Broker Profile in the MLMS via the CMS Enterprise Portal



To participate in the Marketplace for Plan Year 2023, agents and brokers must complete the following actions:

- 1. Update the Agent and Broker Profile in the MLMS via the CMS Enterprise Portal.**
2. Complete Marketplace Training on the MLMS or through an HHS-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 and Broker Registration Status" page on the CMS Enterprise Portal and printing the completion certificate.

Step 1: Update the Agent and Broker Profile in the MLMS via the CMS Enterprise Portal (Continued)



- » Multi-factor Authentication (MFA) is now required for all agents and brokers. If an agent or broker has not already done so, they will be prompted to select an MFA device when they log in to the CMS Enterprise Portal. The agent or broker will receive a code through this device each time they log in.

A screenshot of a web interface for registering an MFA device. The background is dark blue. At the top, there is a shield icon followed by the heading 'Register Multi-Factor Authentication (MFA) Device'. Below this is a paragraph of text explaining that adding an MFA code to a login can make it more secure. Underneath is another heading 'Select the MFA device type to register'. A dropdown menu is open, showing the text 'Select MFA Device' with a downward arrow. The dropdown list contains the following options: 'Select MFA Device', 'Interactive Voice Response (IVR)', 'Email', 'Text Message (SMS)', 'Google Authenticator', and 'Okta Verify'.

Register Multi-Factor Authentication (MFA) Device

Adding an MFA code to your login, also known as Multi-Factor Authentication (MFA), can make your login more secure by providing an extra layer of protection to your User ID and Password.

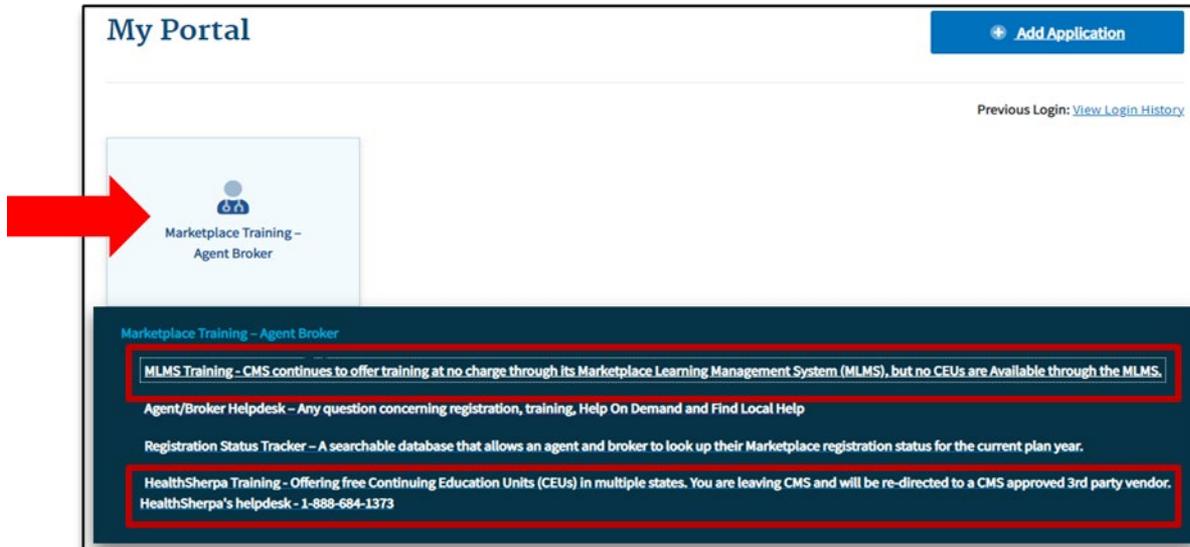
Select the MFA device type to register

Select MFA Device

- Select MFA Device
- Interactive Voice Response (IVR)
- Email
- Text Message (SMS)
- Google Authenticator
- Okta Verify

Step 1: Update the Agent and Broker Profile in the MLMS via the CMS Enterprise Portal (Continued)

- » To access both the CMS-developed training and training offered through the HHS-approved vendor, click the **Marketplace Training – Agent Broker** tile and select either the MLMS Training or Vendor Training option. To update their MLMS profile, agents and brokers will need to select the MLMS Training option.
- » If agents and brokers select the Vendor Training option, they will be re-directed to the HHS-approved vendor's website.



My Portal [+ Add Application](#)

Previous Login: [View Login History](#)

Marketplace Training - Agent Broker

Marketplace Training - Agent Broker

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

Agent/Broker Helpdesk - Any question concerning registration, training, Help On Demand and Find Local Help

Registration Status Tracker - A searchable database that allows an agent and broker to look up their Marketplace registration status for the current plan year.

HealthSherpa Training - Offering free Continuing Education Units (CEUs) in multiple states. You are leaving CMS and will be re-directed to a CMS approved 3rd party vendor.
HealthSherpa's helpdesk - 1-888-684-1373

Step 1: Update the Agent and Broker Profile in the MLMS via the CMS Enterprise Portal (Continued)



- » Select a user role from the two available options.

A screenshot of the CMS.gov My Enterprise Portal. The header includes the CMS.gov logo, 'My Enterprise Portal', 'My Apps', a notification bell, the user name 'Sarah Edwards', 'Help', and 'Log Out'. The main content area contains a text prompt: '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.' Below this is a dropdown menu labeled 'Agent Type *' with two options: 'Agent Broker' and 'Non Agent Broker'. A 'Save' button is located to the right of the dropdown menu.

Step 1: Update the Agent and Broker Profile in the MLMS via the CMS Enterprise Portal (Continued)



- » The information agents and brokers use to complete their MLMS profile will be used to populate Find Local Help at HealthCare.gov and Help On Demand so consumers can find them for assistance. Find Local Help is available in Spanish.

Note: 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. 10

Step 1: Update the Agent and Broker Profile in the MLMS via the CMS Enterprise Portal (Continued)



- » The MLMS profile page will appear in a separate window for agents and brokers to update their profile information.

The screenshot displays the CMS.gov My Enterprise Portal interface. At the top, the navigation bar includes the CMS.gov logo, 'My Enterprise Portal', 'My Apps', a notification bell, the user name 'Sarah Edwards', 'Help', and 'Log Out'. The main content area is divided into two sections: 'Individual Profile' and 'Hours of Operations'. The 'Individual Profile' section contains several input fields: 'User Name' (filled with 'Sarah Edwards'), 'Street Address *', 'City *', 'State *' (a dropdown menu), 'Zip *', 'Phone *', 'Email *', 'URL *', 'National Producer Numb...', 'Confirm National Produc...', 'Preferred Contact *' (a dropdown menu with 'Email' selected), and 'Preferred Languages *' (a dropdown menu). The 'Hours of Operations' section includes a 'Working D...' dropdown, 'From *' (12:00 AM with a clock icon), 'To *' (12:00 AM with a clock icon), and 'Time Zone *' (a dropdown menu). Below the 'Time Zone' dropdown, there is a message: 'Please Select a Timezone'.

Step 1: Update the Agent and Broker Profile in the MLMS via the CMS Enterprise Portal (Continued)



- » Agents and brokers who also act as the authorized representative* for a web-broker or other business entity can add the web-broker's or business entity's NPN by clicking the appropriate "+" link at the bottom of the profile page.
- » Agents and brokers can list up to three NPNs in their MLMS profile.

The screenshot shows the 'Business Entity Profile' form in the CMS.gov My Enterprise Portal. The form includes the following fields and instructions:

- Business Entity Name ***: must be greater than 2 characters
- Business Entity Address ***
- Business Entity City ***
- Business State ***: dropdown menu
- Business Entity Zip ***: Format 5 or 9 digits
- Business Entity Phone ***: Format 10 digits with NO dash
- Business Entity Email ***
- Business Entity URL**
- Business Entity National ...**: 1 to 10 digits CANNOT start with 0
- Confirm Business Entity ...**: 1 to 10 digits CANNOT start with 0

At the bottom of the form, there is a section for 'Web-Based Entity Profile' with a dropdown arrow.

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

Step 1: Update the Agent and Broker Profile in the MLMS via the CMS Enterprise Portal (Continued)



- » Enter information for affiliated web-brokers or business entities.
- » If an agent or broker lists the web-broker's or other business entity's NPN, once they have completed registration, the registration for the additional NPNs they listed will also be complete.

The screenshot displays the 'Web-Based Entity Profile' form within the CMS.gov My Enterprise Portal. The form includes the following fields and instructions:

- Web Entity Name ***: 1 to 10 digits CANNOT start with 0
- Web Entity Address ***: must be greater than 2 characters
- Web Entity City ***: 1 to 10 digits CANNOT start with 0
- Web Entity State ***: dropdown menu
- Web Entity Zip ***: Format 5 or 9 digits
- Web Entity Phone ***: Format 10 digits with NO dash
- Web Entity Email ***
- Web Entity URL**
- Web Entity National Prod...**: 1 to 10 digits CANNOT start with 0
- Web Confirm Entity Natio...**: 1 to 10 digits CANNOT start with 0

A 'Save' button is located at the bottom right of the form.

Step 1: Update the Agent and Broker Profile in the MLMS via the CMS Enterprise Portal (Continued)



- » Once agents and brokers have entered all their profile information, click "Save."

CMS.gov | My Enterprise Portal My Apps Sarah Edwards Help Log Out

1 to 10 digits CANNOT start with 0 1 to 10 digits CANNOT start with 0

Web-Based Entity Profile

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

Web Entity Name *	Web Entity Address * <small>must be greater than 2 characters</small>	Web Entity City *	Web Entity State *
Web Entity Zip * <small>Format 5 or 9 digits</small>	Web Entity Phone * <small>Format 10 digits with NO dash</small>	Web Entity Email *	Web Entity URL
Web Entity National Prod... <small>1 to 10 digits CANNOT start with 0</small>	Web Confirm Entity Natio... <small>1 to 10 digits CANNOT start with 0</small>		

Save

Step 1: Update the Agent and Broker Profile in the MLMS via the CMS Enterprise Portal (Continued)



- » Agents and brokers must enter a correct NPN in their 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 a state license number. Be sure to use an NPN, not a state license number.
 - To update the NPN, agents and brokers can click the “Complete Agent and Broker Training” hyperlink and update the information in the MLMS profile.
 - Agent and broker NPNs can be found at www.nipr.com/PacNpnSearch.htm.

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

Step 1: Update the Agent and Broker Profile in the MLMS via the CMS Enterprise Portal (Continued)



General MLMS Updates

- » CMS validates the 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.
- » To be validated, agents and brokers must:
 - Have a valid state license;
 - Have a [valid health-related line of authority \(LOA\)](#) in their resident state; and
 - Have an active status for their health-related LOA.

Step 1: Update the Agent and Broker Profile in the MLMS via the CMS Enterprise Portal (Continued)



New Line of Authority Validation Requirements for Marketplace Agents and Brokers

- » What's New: CMS is updating the agent/broker licensure validation methodology in some states.
- » Background: Each state Department of Insurance (DOI) determines the requirements for agents and brokers in their specific state. CMS validates the status of an agent's or broker's licensure through the National Insurance Producer Registry (NIPR) on a weekly basis. Specifically, licensure validation is determined by checking license status and the presence of a valid health line of authority (LOA) in the resident state for each agent or broker.
- » **Agents and brokers who do not have an approved health-related LOA, as determined by their resident state, will lose their access to Marketplace systems and will not be able to assist consumers with Marketplace activities for Plan Year 2023.**

Step 1: Update the Agent and Broker Profile in the MLMS via the CMS Enterprise Portal (Continued)



Agents and brokers can take several steps now to check and see if they need to take further action.

- » Check resident state requirements for Appointment Level LOA, Approved Class Type and/or Approved License Level LOA at <https://data.healthcare.gov/AB-NIPR-Health-Line-Of-Authority>
- » Then, agents and brokers can go to NIPR at <https://nipr.com/licensing-center/add-a-line-of-authority> and use the “Look Up Your National Producer Number (NPN)” at the bottom of the page to check their personal licensure information for their resident state.
- » If agents and brokers do not have the required resident state LOA, they can use the links to “Add a Line of Authority” and work directly with their resident state DOI regarding licensing requirements.

The validation of agents’ and brokers’ licenses will be reviewed weekly following completion of the required annual agent and broker Registration and Training. Agents and brokers can check the Registration Completion List at <https://data.healthcare.gov/ab-registration-completion-list> to confirm that their NPN is listed and the “NPN Valid (Current Year Only)” reflects “Y” for yes prior to assisting consumers with enrollment.

Step 2: Complete Marketplace Training on the MLMS or through an HHS-approved Vendor via the CMS Enterprise Portal



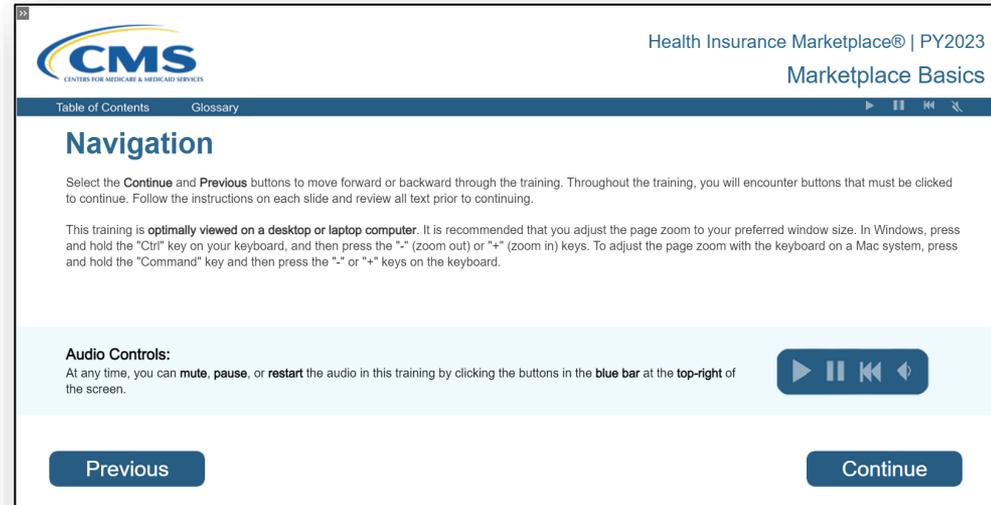
1. Update the Agent and Broker Profile in the MLMS via the CMS Enterprise Portal.
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Step 2: Complete Marketplace Training on the MLMS or through an HHS-approved Vendor via the CMS Enterprise Portal (Continued)



Plan Year 2023 Enhancements

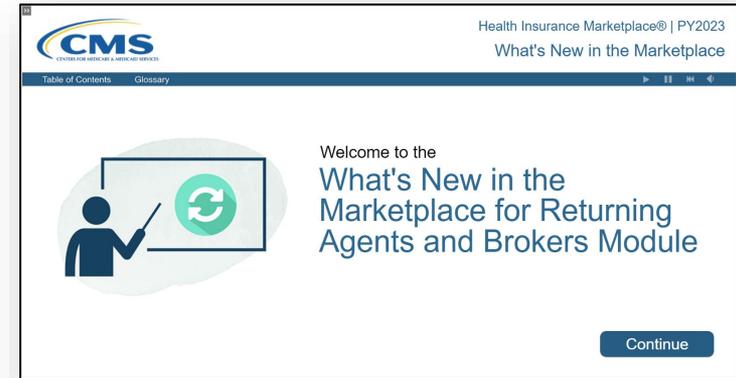
- » CMS has added an audio component to Plan Year 2023 training.
- » The audio will automatically begin to play when the training is launched.
- » At any time, agents and brokers can **mute**, **pause**, or **restart** the audio in the training by clicking the buttons in the blue bar at the top-right of the screen.
- » Adjust the volume settings on speakers or headset as needed.
- » The training is optimally viewed on a desktop or laptop computer.



Step 2: Complete Marketplace Training on the MLMS or through an HHS-approved Vendor via the CMS Enterprise Portal (Continued)



- » 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 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 Small Business Health Options Program (SHOP) training or the full Individual Marketplace training, as desired.



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

Step 2: Complete Marketplace Training on the MLMS or through an HHS-approved Vendor via the CMS Enterprise Portal (Continued)



- » The curriculum for the Marketplace Training for Returning Agents and Brokers consists of one required training module, one required exam, and four optional review modules.

Required

- » What's New for Returning Agents and Brokers
- » Returning Agents and Brokers What's New Exam*

Optional

- » Refresher: Marketplace Basics (OPTIONAL)
- » Refresher: Individual Marketplace (OPTIONAL)
- » Refresher: Privacy and Security (OPTIONAL)
- » Small Business Health Options Program (OPTIONAL)

**Agents and brokers must obtain a score of 70% or higher to pass the exam. If they do not pass, they can re-take the exam.*

Step 2: Complete Marketplace Training on the MLMS or through an HHS-approved Vendor via the CMS Enterprise Portal (Continued)



- » To ensure an agent or broker is eligible for Marketplace Training for Returning Agents and Brokers, they should confirm that their NPN appears on the [Agent and Broker FFM Registration Completion List](#) for Plan Year 2022.
- » If an agent or broker believes they completed the Plan Year 2022 registration and training process, but do not find their name on the RCL, they can send an email to FFMProducer-AssisterHelpDesk@cms.hhs.gov for additional assistance.

An official website of the United States government: <https://data.gov/health>

data.**HealthCare.gov** Datasets API Search

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. 8,538 (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) and at 78 Fed. Reg. 6,591 (February 14, 2018). 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 an NPN Validation column. The indicator in the NPN Validation column is a check that occurs on the National Insurance Producer Registry (NIPR <https://www.nipr.com/>) database. A valid National Producer Number (NPN) and an active licensure status in a healthcare related line of authority (<https://data.healthcare.gov/dataset/wk5a-kdpd>) 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 (https://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 https://www.nipr.com/index_fair_credit_reporting_act.htm and submit your dispute.

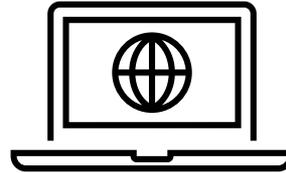
For a list of qualifying healthcare related lines of authority or if the agent or broker's NPN is valid in NIPR and has an active status however, does not have a "Y" in the current year NPN Validation column please contact FFM Producers and Assisters' Email Help Desk at FFMProducer-AssisterHelpDesk@cms.hhs.gov.

Step 2: Complete Marketplace Training on the MLMS or through an HHS-approved Vendor via the CMS Enterprise Portal (Continued)



Agents and brokers have two options for training in Plan Year 2023:

- » CMS-developed training through the MLMS (Individual Marketplace and SHOP).
- » Training offered through the HHS-approved vendor (Individual Marketplace only*).



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

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

Step 2: Complete Marketplace Training on the MLMS or through an HHS-approved Vendor via the CMS Enterprise Portal (Continued)



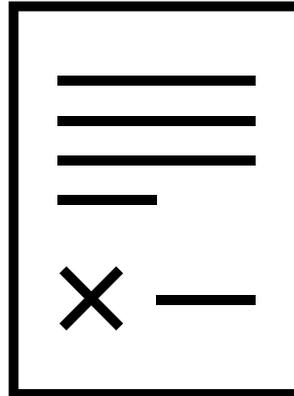
- » In addition to the CMS-developed training on the MLMS, which does not offer continuing education units (CEUs), there will be an approved vendor offering Marketplace training and CEUs for Plan Year 2023.*
- » In Plan Year 2023, the HHS-approved vendor will not be charging a fee to take its training.
- » The approved vendor is required to offer CEUs in a minimum of five states where the Marketplace operates (45 CFR § 155.222).
 - Agents and brokers can use these CEUs to meet state licensure requirements for continuing education.
 - For more information on individual state CEU requirements, check with the respective state Department of Insurance.
 - The list of states where the approved vendor offers CEUs is available on the CMS Enterprise Portal "Agent and Broker Training Options" page by clicking the "Learn More" link.
- **Note: The SHOP curriculum is not available through the HHS-approved vendor.*



Step 2: Complete Marketplace Training on the MLMS or through an HHS-approved Vendor via the CMS Enterprise Portal (Continued)

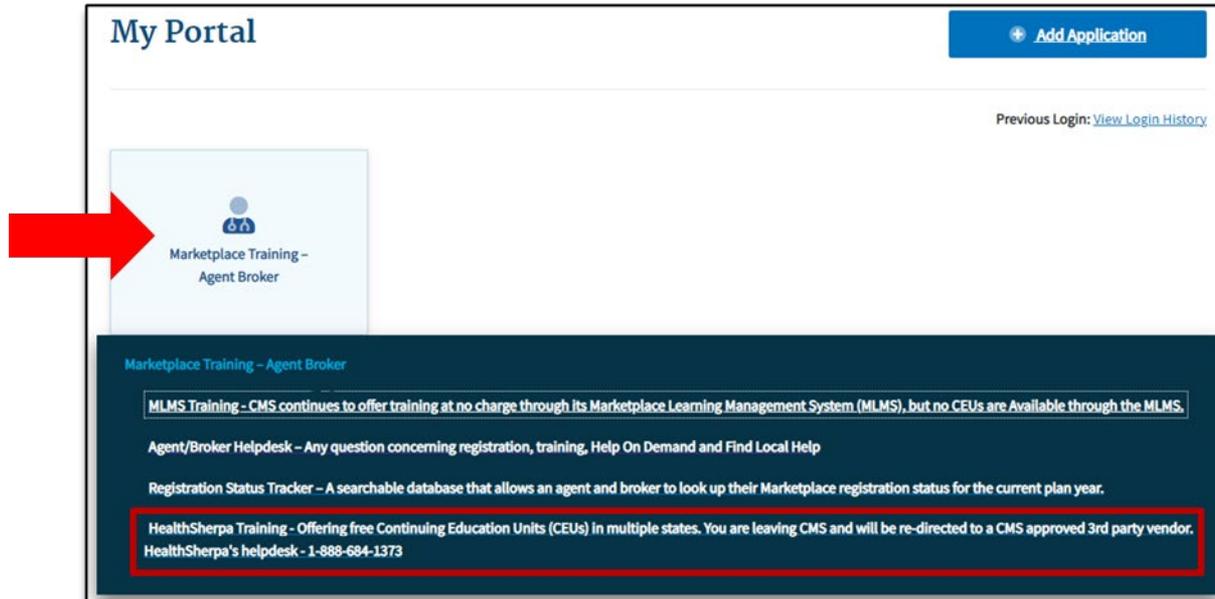


- » Completing Marketplace training through the HHS-approved vendor still requires agents and brokers to execute the applicable Agreement(s) on the MLMS prior to assisting consumers.



Step 2: Complete Marketplace Training on the MLMS or through an HHS-approved Vendor via the CMS Enterprise Portal (Continued)

- » If agents and brokers choose to complete training through the HHS-approved vendor, they must access the training via the CMS Enterprise Portal. Agents and brokers cannot go directly to the vendor's website to access the training content.
- » Click the **Marketplace Training – Agent Broker** tile and select the Vendor Training option shown below, and the CMS Enterprise Portal will redirect to their website.



My Portal [+ Add Application](#)

Previous Login: [View Login History](#)

Marketplace Training - Agent Broker

[Marketplace Training - Agent Broker](#)

[MLMS Training - CMS continues to offer training at no charge through its Marketplace Learning Management System \(MLMS\), but no CEUs are Available through the MLMS.](#)

[Agent/Broker Helpdesk - Any question concerning registration, training, Help On Demand and Find Local Help](#)

[Registration Status Tracker - A searchable database that allows an agent and broker to look up their Marketplace registration status for the current plan year.](#)

[HealthSherpa Training - Offering free Continuing Education Units \(CEUs\) in multiple states. You are leaving CMS and will be re-directed to a CMS approved 3rd party vendor. HealthSherpa's helpdesk - 1-888-684-1373](#)

Step 2: Complete Marketplace Training on the MLMS or through an HHS-approved Vendor via the CMS Enterprise Portal (Continued)



- » Once an agent or broker completes training through the HHS-approved vendor, they will be directed to log back into the CMS Enterprise Portal to complete registration, including signing the applicable Marketplace Agreement(s) on the MLMS (Step 3).

Do you agree to accept the terms and conditions of the Agent Broker General Agreement For Individual Market Federally-facilitated Exchanges and State-based Exchanges on the Federal Platform?

Select "I Agree" to provide your electronic signature. Select your response, and then select submit.

I Agree

I Do Not Agree

Remember! Agents and brokers cannot enroll consumers in Marketplace coverage or be compensated for their work until they return to the MLMS and complete all of the steps in the registration process.

Note: Agents and brokers who do not log into MLMS for more than a year will have their account deactivated, requiring them to complete identity proofing again when they return. Returning individuals with a deactivated account should ensure they are using the same FFM User ID they used previously and their Social Security Number (SSN) is populated in IDM.

Step 3: Read and accept the applicable Marketplace Agreement(s) on the MLMS

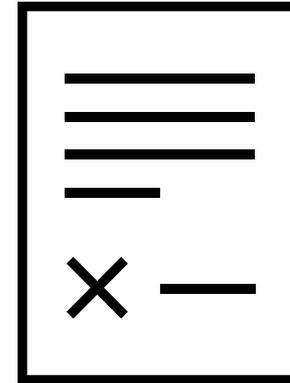


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- 3. Read and accept the applicable Marketplace Agreement(s) on the MLMS.**
4. Confirm completion of all registration steps by logging back in to the "Agent and Broker Registration Status" page on the CMS Enterprise Portal and printing the completion certificate.

Step 3: Read and accept the applicable Marketplace Agreement(s) on the MLMS

(Continued)

- » Agents and brokers must execute the Agreement(s) associated with the Marketplace(s) they are participating in:
 - Individual Marketplace General Agreement
 - Individual Marketplace Privacy and Security Agreement
 - SHOP Privacy and Security Agreement
- » An agent or broker must update their MLMS profile information and complete the required training and exams before they can sign the Agreement(s).



Step 4: Confirm completion of all registration steps by logging back in to the CMS Enterprise Portal and printing the completion certificate

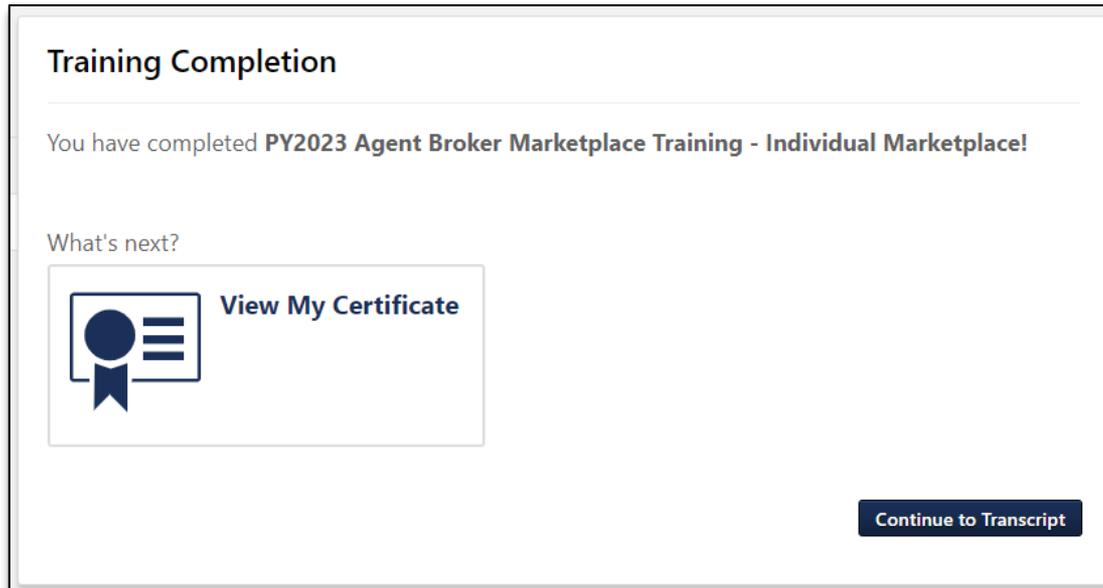


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- 4. Confirm completion of all registration steps by logging back in to the CMS Enterprise Portal and printing the completion certificate.**

Step 4: Confirm completion of all registration steps by logging back in to the CMS Enterprise Portal and printing the completion certificate (Continued)



- » After completing the required Agent Broker Curriculum Training and examinations, agents and brokers can access their certificate from the Transcript page. Navigate to the transcript and select "Completed" from the status drop-down. Select the blue "View Completion Page" button next to the desired course. On the Completion page, select "View My Certificate."



Step 4: Confirm completion of all registration steps by logging back in to the CMS Enterprise Portal and printing the completion certificate (Continued)



- » The Registration Completion Certificate will include:
 - Agent's and broker's name
 - Agent's and broker's NPN(s)
 - The market segment(s) for the certificate
 - The Plan Year for the certificate



Issuers may request to view the Registration Completion Certificate(s). However, issuers are instructed to review the [Agent and Broker FFM Registration Completion List \(RCL\)](#) to confirm the registration status of agents and brokers.

Step 4: Confirm completion of all registration steps by logging back in to the CMS Enterprise Portal and printing the completion certificate (Continued)



- » Agents and brokers should also confirm that their information appears on the [RCL](#).
- » 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 the NPN does not appear for Plan Year 2023, go to the [Marketplace Registration Tracker](#) to check the Marketplace registration status.
 - Enter an NPN and ZIP code.
 - Information is updated once daily by 5:00 PM ET.
- » If additional assistance is needed, 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 lookup your status.

NPN
(numbers only)

ZIP code
(5 digit only)

Plan Year 2023 Health Insurance Marketplace® Updates

Enrollment or Active Re-enrollment via the Marketplace Call Center: Consumer Authorization



- » Consumers can contact the Marketplace Call Center to authorize agents and brokers to access their information and work with the Call Center's Customer Service Representatives on their behalf for up to 365 days.
- » This FFM authorization is not the same as ensuring the agent's or broker's NPN is on the consumer's application for purposes of receiving compensation from affiliated QHP issuers.
- » Once authorized, agents and brokers should instruct the Call Center Representative to include their full name and NPN on the enrollment transaction.

Consumers who want to provide agents and brokers with this type of access should:

- Provide the Marketplace Call Center with their full name and NPN.
- Complete the authorization prior to the start of Open Enrollment (OE).
- Call the Marketplace Call Center every 365 days to reauthorize access.

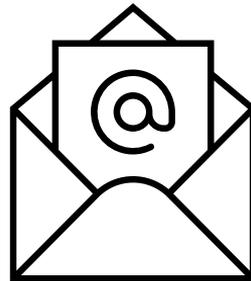
Support Available for Complex Consumer Cases



- » If an agent or broker is unsuccessful in resolving the case with the Call Center or EDE partner and still require assistance, contact the FFM Agent and Broker Email Help Desk (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 the request
 - Whether the case is medically urgent (and if so, when a response is needed)
 - Indicate that the Marketplace Call Center or EDE partner has already been called and provide the date of the call
- » The Help Desk will refer the information provided to representatives from our Complex Case Help Center (CCHC) so they can respond to the issue. A member of the CCHC team will contact the agent and broker via phone for additional information or to communicate the outcome of the case.

Registration and Training Survey

- » Agents and brokers will receive a survey via email within two weeks of completing training. This survey will not take very long, and we would love to hear your feedback. Please complete the survey to help us improve and enhance Marketplace registration and training in the future.



Live Question/Answer Session & Agent and Broker Outreach Updates

Agent and Broker Resources Webpage



The Agent and Broker Resources webpage contains a section specifically dedicated to Registration and Training. The page contains key registration and training resources, as well as links to the Agent and Broker Federally-facilitated Marketplace (FFM) Registration Completion List.

The screenshot shows the CMS.gov website interface. At the top, there is a navigation menu with links for Medicare, Medicaid/CHIP, Medicare-Medicaid Coordination, Private Insurance (highlighted), Innovation Center, Regulations & Guidance, Research, Statistics, Data & Systems, and Outreach & Education. A search bar is located on the right. Below the navigation, a breadcrumb trail reads: Home > Programs and Initiatives > Health Insurance Marketplaces > Plan Year 2022 Registration and Training. The main content area features a 'CCIO' button and a heading 'Plan Year 2022 Registration and Training'. Below this heading, a message states: 'Plan Year 2022 Marketplace Registration and Training is Closed as of July 15'. A sub-heading reads: 'Plan year 2022 Marketplace registration and training for agents and brokers on the Marketplace Learning Management System (MLMS) is **currently offline** while CMS performs scheduled system'. To the right, a section titled 'Resources for Agents and Brokers' contains links for 'Resources for Agents and Brokers in the Health Insurance Marketplaces' and 'General Resources'. A left sidebar contains links for 'Programs and Initiatives', 'Consumer Support and Information', and 'In-Person Assistance in the Health Insurance Marketplaces'.

» Visit <https://www.cms.gov/CCIIO/Programs-and-Initiatives/Health-Insurance-Marketplaces/Plan-Year-2022-Registration-and-Training> to access the page.

- » The **Agent and Broker Video Learning Center (VLC)** features technical assistance videos on a variety of topics to help agents and brokers navigate the Marketplace. Agents and brokers can view the full playlist here: <https://bit.ly/3hXLyru>.

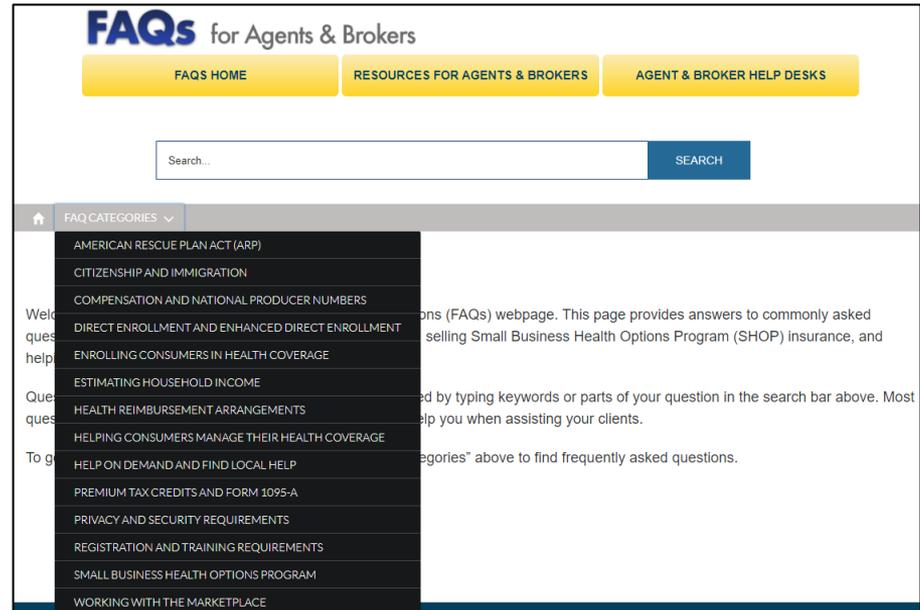


Frequently Asked Questions Database



The Agent and Broker Frequently Asked Questions (FAQs) website includes a category dedicated to [Registration and Training FAQs](#).

- » This self-service resource is available online and is linked on the Agent and Broker Resource webpage.



Upcoming Webinars & Office Hours



Upcoming Webinars

Reaching Underserved Communities

Understanding Marketplace Compliance Rules and Regulations

Welcome to the Marketplace: A Guide for NEW Agents and Brokers

Complex Case Scenarios

Preparing for Plan Year 2023 Open Enrollment

Helping Consumers More Effectively for Plan Year 2023

Plan Year 2023 Marketplace Policy and Operations Updates

Help On Demand

Mastering the HealthCare.gov Application

Upcoming Webinar & Office Hours

(Continued)



Register for upcoming office hours by visiting <https://www.regtap.info/> and following the instructions below. Registration for webinars will be available as the date approaches.

1. Log in to REGTAP. If an agent or broker is new to REGTAP, click "Register as a New User." Agents and brokers will receive an email to confirm their account.
2. Click "Training Events" on "My Dashboard."
3. Click the "View" icon next to the desired webinar topic/title.
4. Click the "Register Me" button.
5. For further assistance logging in to REGTAP or registering for a webinar, contact the Registrar at 1-800-257-9520 or registrar@REGTAP.info. Assistance is available Monday through Friday from 9:00 AM - 5:00 PM ET. *Note: Registration closes 24 hours prior to each event.*

Office Hour Dates	Time
Thursday, November 3, 2022	2:00 – 3:00 PM EST
Thursday, November 17, 2022	2:00 – 3:00 PM EST
Thursday, December 8, 2022	2:00 – 3:00 PM EST
Thursday, January 5, 2023	2:00 – 3:00 PM EST

Agent and Broker Marketplace Help Desks and Call Centers



Name	Phone # and/or Email Address	Types of Inquiries Handled	Hours (Closed Holidays)
Agent and Broker Email Help Desk	FFMProducer-AssisterHelpDesk@cms.hhs.gov	<ul style="list-style-type: none"> • General enrollment and compensation questions • Manual identity proofing/Experian issues • Escalated registration and training questions (not related to a specific training platform) • Agent and 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 and 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	<ul style="list-style-type: none"> • 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 and 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 and Broker Partner Line	855-788-6275 Note: Enter an NPN to access this line. TTY users 1-855-889-4325	Specific consumer application questions related to: <ul style="list-style-type: none"> • 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

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



Name	Phone # and/or Email Address	Types of Inquiries Handled	Hours (Closed Holidays)
Agent and Broker Training and Registration Email Help Desk	MLMSHelpDesk@cms.hhs.gov	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • 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

Agent and Broker Resource Links



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/CCIOAB
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
Find Local Help	Tool available on HealthCare.gov that enables consumers to search for a local, Marketplace-registered agent and broker to assist with Marketplace enrollment	https://localhelp.healthcare.gov/
Help On Demand	Consumer assistance referral system operated by Help On Demand (formerly known as BigWave Systems) that connects consumers seeking assistance with Marketplace-registered, state-licensed agents and brokers in their area who can provide immediate assistance with Marketplace plans and enrollments	https://www.cms.gov/CCIIO/Programs-and-Initiatives/Health-Insurance-Marketplaces/Downloads/Help-On-Demand.pdf
Agent and Broker NPN Search Tool	Enables users to search and find the correct NPN to enter in the MLMS profile and on Marketplace applications	www.nipr.com/PacNpnSearch.htm

Agent and Broker Resource Links (Continued)



Resource	Description	Link
List of Approved Health-related Lines of Authority	Provides a list of valid health-related lines of authority for agents and brokers by resident state	https://data.healthcare.gov/AB-NIPR-Health-Line-Of-Authority
National Insurance Producer Registry	Provides licensure and compliance information for agents and brokers	https://nipr.com/licensing-center/add-a-line-of-authority
CMS Enterprise Portal	Allows agents and brokers to securely complete identity proofing and access the MLMS to complete annual, required Marketplace agent and broker training and registration	https://portal.cms.gov
Partner Directory for Agents and Brokers	List of approved, participating issuers and web-brokers includes entities that offer online resources for agents and brokers, such as enrollment and client management functionality	https://data.healthcare.gov/issuer-partner-lookup
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
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 Resource Links (Continued)



Resource	Description	Link
Agent and Broker FFM Registration Completion List (RCL)	Public list of agents and brokers who have completed Marketplace registration; used by issuers to verify agents' and brokers' 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/
Agent and Broker Video Learning Center (VLC)	The Agent and Broker Video Learning Center features technical assistance videos on a variety of topics to help navigate the Marketplace.	https://bit.ly/3hXLyru

Acronym Definitions



Acronym	Definition
CCIIO	Center for Consumer Information and Insurance Oversight
CEU	Continuing Education Unit
CMS	Centers for Medicare & Medicaid Services
FFM	Federally-facilitated Marketplace
HHS	Department of Health & Human Services
IDM	Identity Management System
LOA	Line of Authority
MFA	Multi-Factor Authentication
MLMS	Marketplace Learning Management System
NIPR	National Insurance Producer Registry
NPN	National Producer Number

Acronym	Definition
QHP	Qualified Health Plan
RCL	Registration Completion List
SHOP	Small Business Health Options Program



Agents and brokers are valued partners to all of us at CMS for the vital role you play in enrolling consumers in qualified health coverage.

We thank you for the trusted advice, support, and assistance you provide throughout the year and wish you continued success!