



# Participating In The Federally-facilitated Marketplaces



**Registration Process for  
Agents and Brokers**

**August 16 and 23 and  
September 6, 13, 20, and 27**

# Agenda

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



# Participating In The Federally-facilitated Marketplaces



## Introduction and Objectives

# Webinar Objectives

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

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

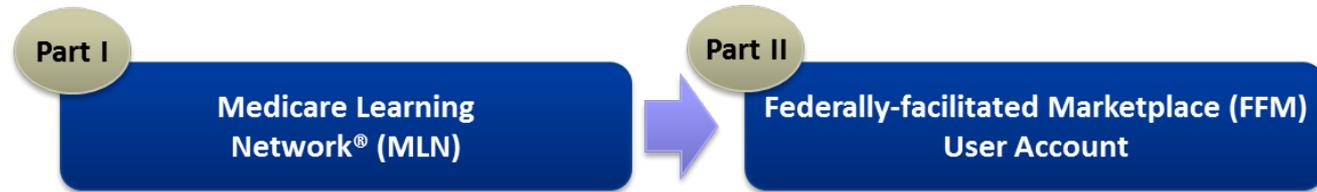


# Participating In The Federally-facilitated Marketplaces

## Registration Overview



# Registration Overview



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

# Summary of Registration Activities for Agents and Brokers Participating in an FFM

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

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

**COURSES:** ACA Affordable Care Act and Marketplace Basics  
 IM Individual Marketplace Course  
 SHOP SHOP Marketplace Course

# Considerations for Web-brokers (Individual Market)

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

# Participating In The Federally-facilitated Marketplaces



## Registration Process Steps

# Summary of the Registration Process

## Steps

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

- Part I
  - Occurs on the Medicare Learning Network (MLN)<sup>®</sup>
  - Covers training, exams, and signing agreement(s)
  - Takes approximately 3.5 - 4 hours to complete, and depends on the specific Marketplace curriculum selected
- Part II
  - Occurs on the CMS Enterprise Portal
  - Covers the establishment of an FFM User Account, and completion of identify verification
  - Takes approximately 30 minutes to complete
  - Only required for agents and brokers serving in the individual market

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

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

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

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

Welcome

Enter your login information below.

Need an account? [Create Account](#)

\* Login ID  
  
[Forgot your login ID?](#)

\* Password  
  
[Forgot your password?](#)

[Log In](#)

[Contact Administrator](#)

### Recent Announcements

Welcome!

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

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

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

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

## Step 1a.

Self-select your user name and password; enter basic identifying information, including your National Producer Number (NPN).

Select your User Type – User Role:

Agent/Broker/Web-broker –

Individual Market

Agent/Broker/Web-broker –

SHOP

Agent/Broker/Web-broker –

Individual Market and SHOP

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

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

**NPN #’: If you do not know your NPN, you may obtain it at:**

**<https://pdb.nipr.com/html/PacNpnSearch.html>**

Create New Account

\* Login ID

\* Password

\* Confirm Password

\* First Name

Middle Name

\* Last Name

\* Email Address

\* Work Phone  Ext.

\* U.S. State

\* Postal Code

\* User Type/User Role

\* NPN#

Organization Type

\* Organization

Job Title

Manager

\* Primary Language

\* Region

\* Time Zone

Enable Accessibility

\* # of Records (per page)

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

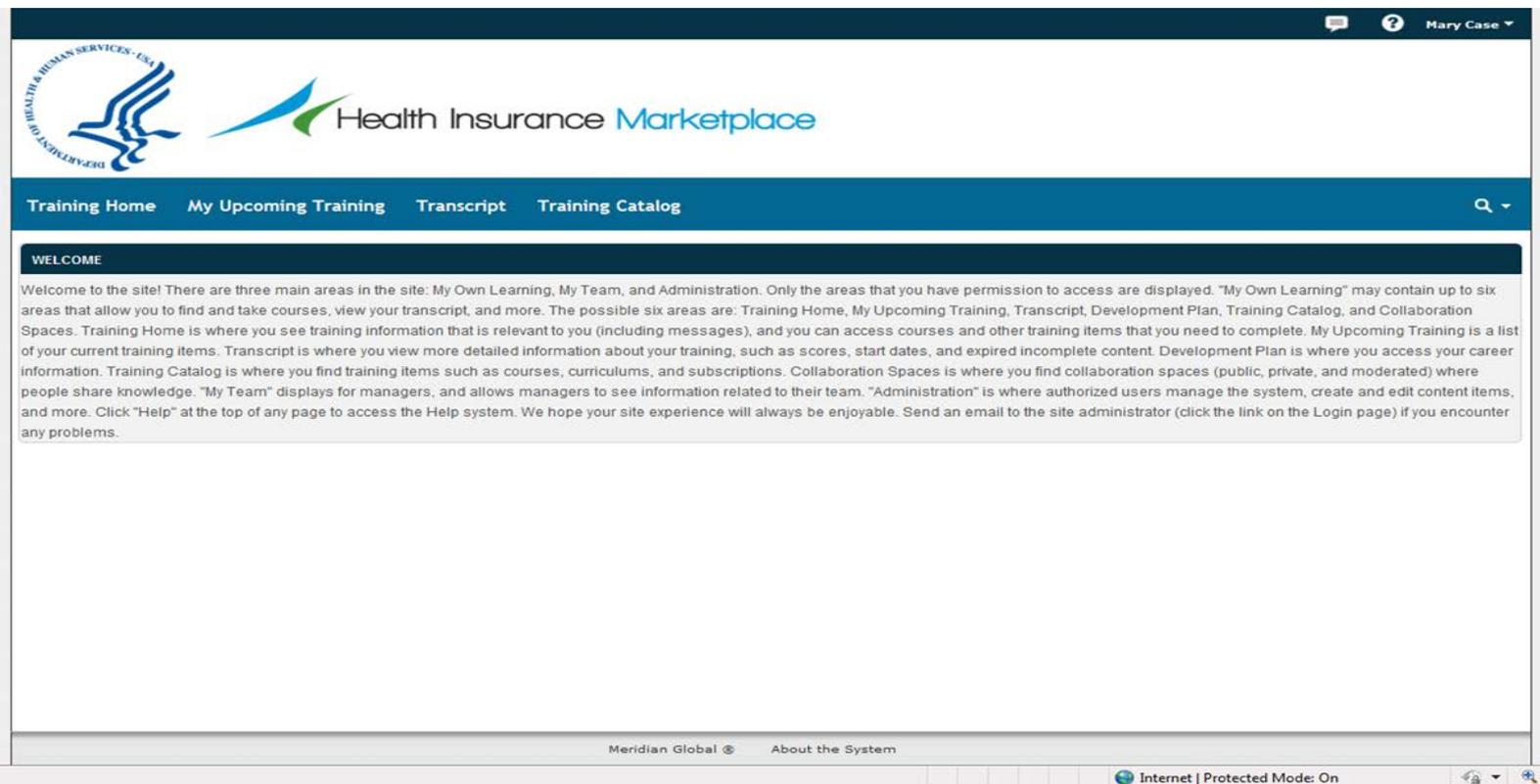
Next to the second field, 'Organization,' click on the blue text that says 'Select.' A new screen will pop up. Click the gray 'Search' button, and the Organization named Marketplace will appear as the only option. Click the circle to select Marketplace, select 'Save,' and you will be returned to the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

The screenshot shows a 'Select Organizations' dialog box. The dialog box has a title bar with a close button. Below the title bar is a search field labeled 'Find Organization:' with a 'Search' button. Below the search field is a table with columns 'Organization(s)' and 'Path'. The table contains one row with a radio button next to 'Marketplace'. At the bottom of the dialog box are 'Cancel' and 'Save' buttons. Red arrows point to the 'Search' button, the radio button, and the 'Save' button.

Organization(s)	Path
<input type="radio"/> Marketplace	

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

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



# Part I: Medicare Learning Network<sup>®</sup>

## (Step 2)

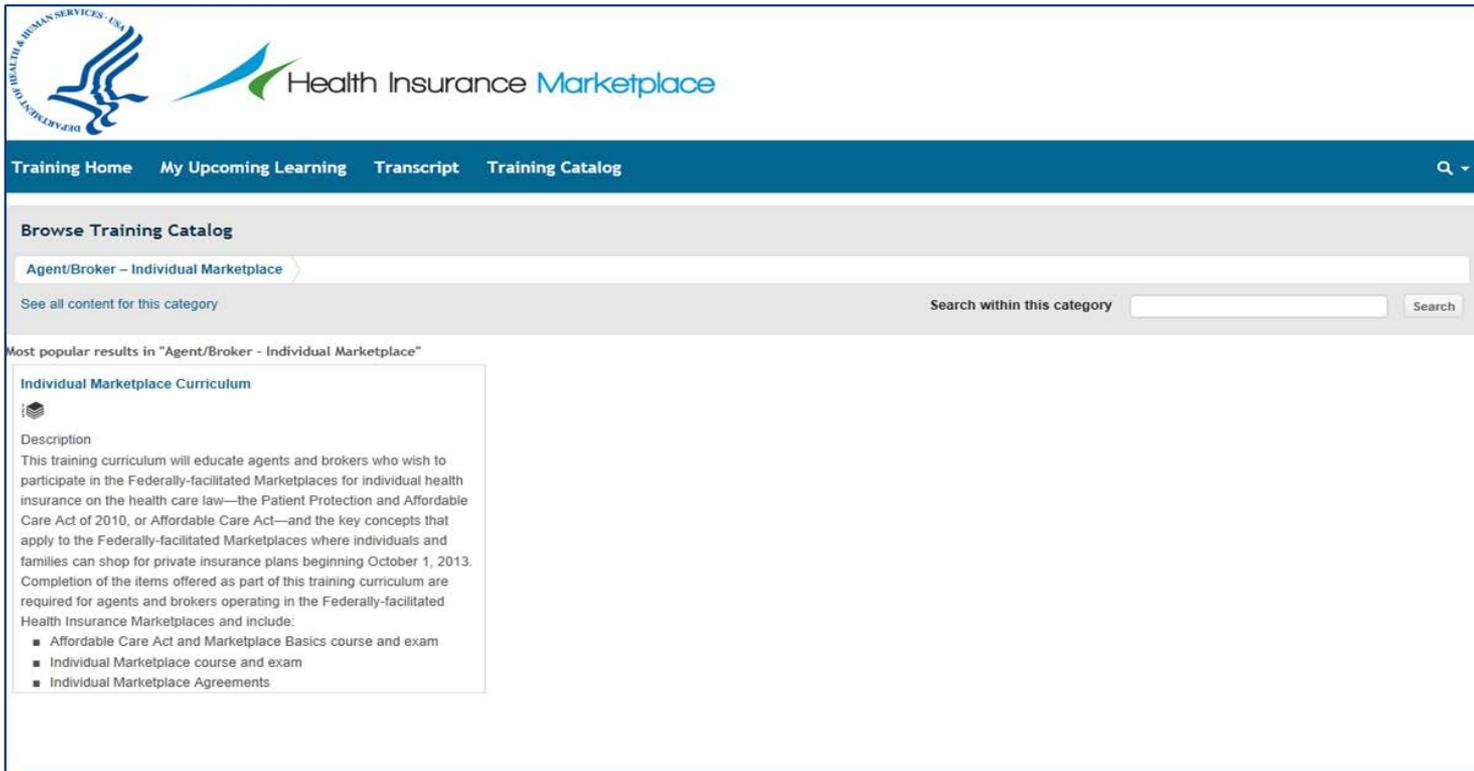
*Step 2.* Click on the 'Training Catalog' Tab, and click on your User Type – User Role under 'Browse by Category.'

The screenshot displays the Health Insurance Marketplace interface. At the top left is the Department of Health & Human Services logo. The main header reads "Health Insurance Marketplace". A dark blue navigation bar contains the following tabs: "Training Home", "My Upcoming Learning", "Transcript", and "Training Catalog" (which is highlighted and pointed to by a red arrow). A search icon is visible on the right side of the navigation bar. Below the navigation bar, the page is titled "Browse Training Catalog". Underneath, there is a search section with a "Search for:" input field, a dropdown menu set to "Any words", and a "Search" button. Below the search section is a "Browse by Category" section, which is pointed to by another red arrow. This section lists several categories with their respective counts in parentheses: "Agent/Broker – Individual & SHOP Marketplace (1)", "Agent/Broker – Individual Marketplace (1)", "Agent/Broker – SHOP Marketplace (1)", "Certified Application Counselor (1)", "In-Person Assistance Personnel (1)", and "Navigator (1)".

# Part I: Medicare Learning Network®

## (Step 3)

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

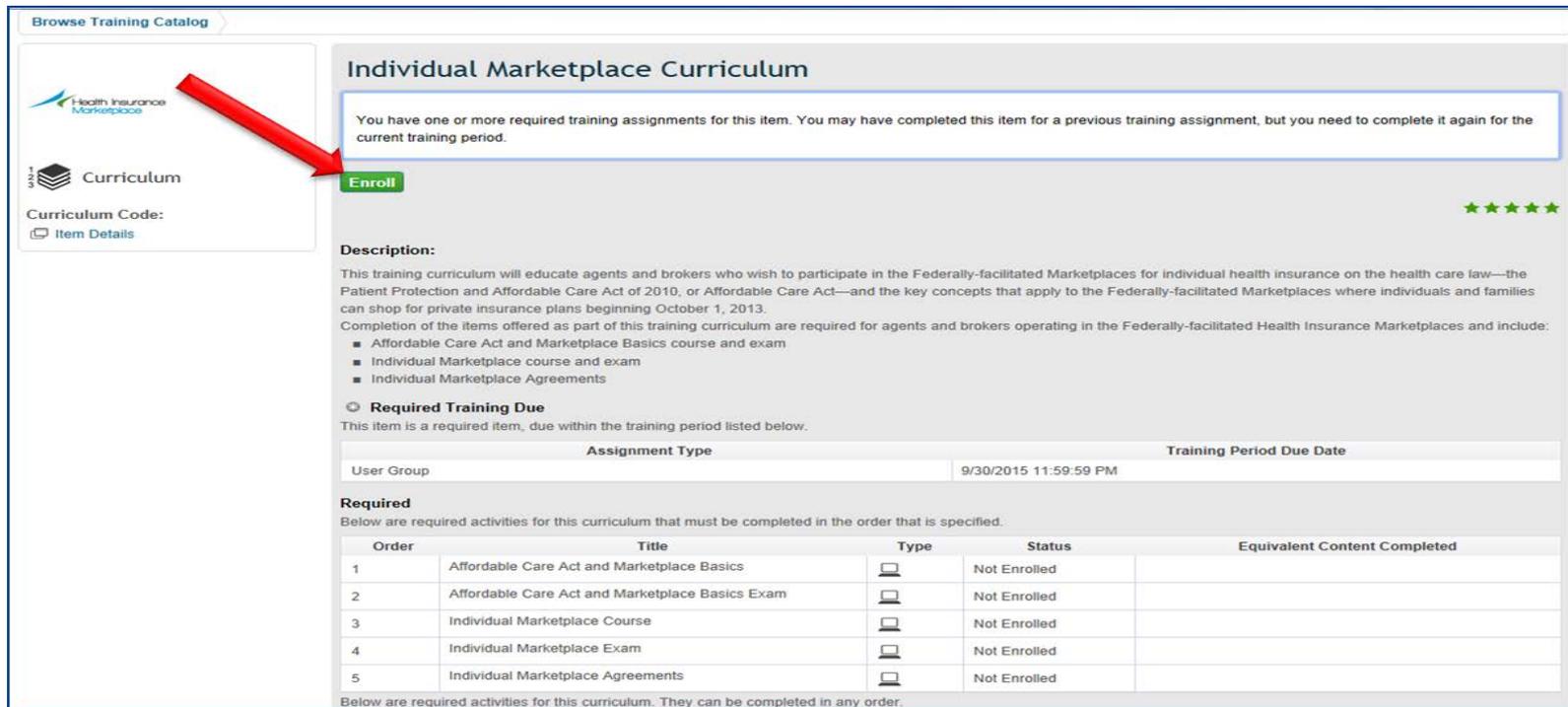


The screenshot displays the Health Insurance Marketplace Training Catalog interface. At the top, there are logos for the Department of Health & Human Services - USA and Health Insurance Marketplace. Below the logos is a navigation bar with links for Training Home, My Upcoming Learning, Transcript, and Training Catalog, along with a search icon. The main content area is titled 'Browse Training Catalog' and shows a selected category: 'Agent/Broker – Individual Marketplace'. Below this, there is a search bar and a section for 'Most popular results in "Agent/Broker - Individual Marketplace"'. A red arrow points to the first result, 'Individual Marketplace Curriculum', which includes a description and a list of topics: Affordable Care Act and Marketplace Basics course and exam, Individual Marketplace course and exam, and Individual Marketplace Agreements.

# Part I: Medicare Learning Network®

## (Step 4)

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



The screenshot shows the 'Individual Marketplace Curriculum' page. On the left, there is a sidebar with 'Health Insurance Marketplace' and 'Curriculum' sections. A red arrow points from the 'Enroll' button in the main content area to the 'Curriculum' link in the sidebar. The main content area displays a message about required training assignments, a green 'Enroll' button, a 5-star rating, and a description of the curriculum. Below the description, there is a table for 'Required Training Due' and another table for 'Required' activities.

**Individual Marketplace Curriculum**

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

**Enroll** ★★★★★

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

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

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

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

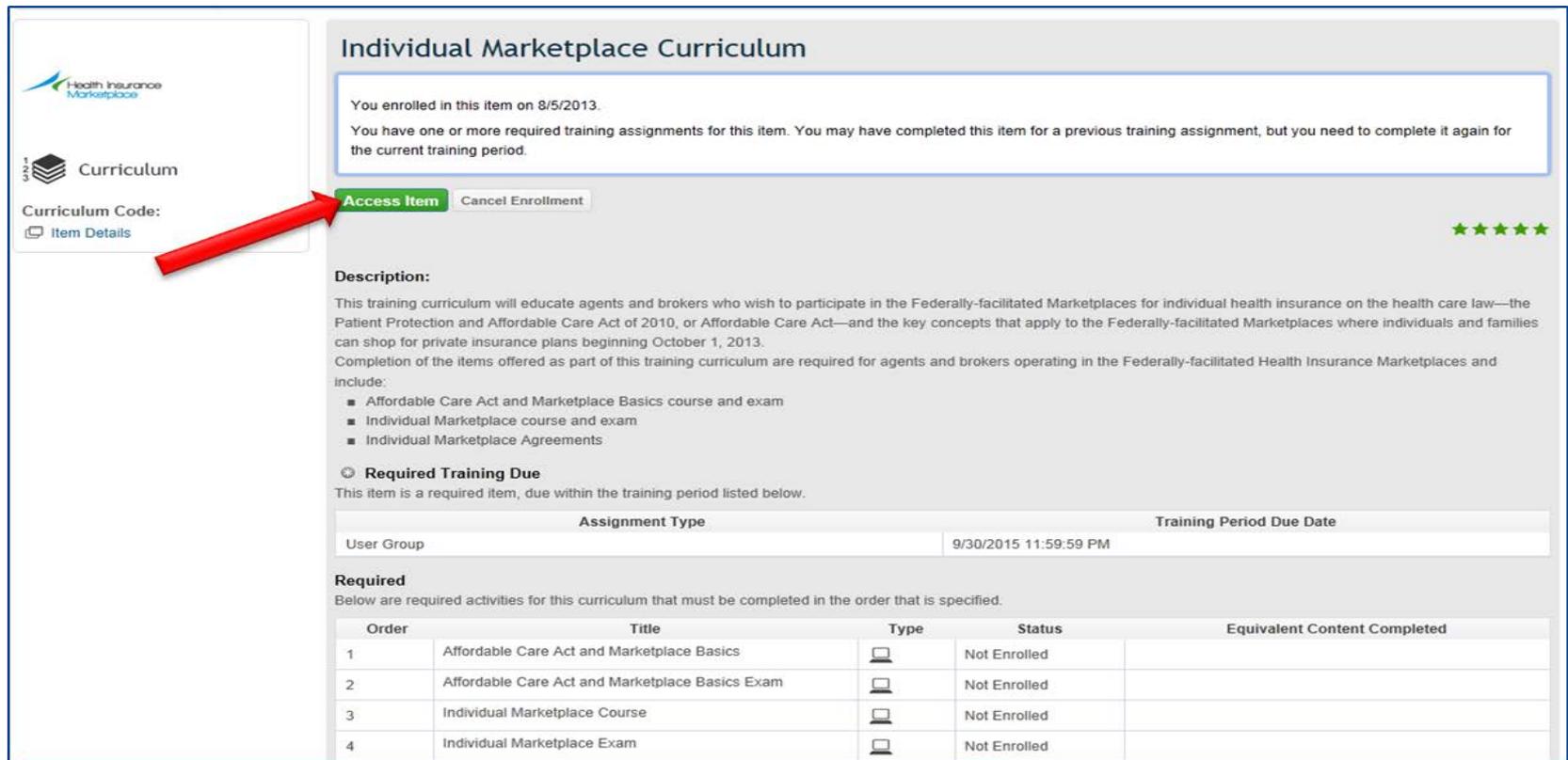
**Required**  
Below are required activities for this curriculum that must be completed in the order that is specified.

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

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

# Part I: Medicare Learning Network® (Step 5)

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



The screenshot shows the 'Individual Marketplace Curriculum' page. On the left sidebar, there is a 'Curriculum' section with a 'Curriculum Code:' and an 'Item Details' link. A red arrow points from the 'Item Details' link to the 'Access Item' button. The main content area includes a notification box stating enrollment on 8/5/2013 and a requirement to complete training assignments. Below this is a 'Description' section with a bulleted list of required activities. A 'Required Training Due' section indicates the item is due by 9/30/2015 11:59:59 PM. At the bottom, a table lists the required activities in order, all with a status of 'Not Enrolled'.

**Individual Marketplace Curriculum**

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

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

★★★★★

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

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

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

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

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

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

# Part I: Medicare Learning Network® (Step 6)

Step 6. Click the title of the first course.



Curriculum

Curriculum Code:

[Item Details](#)

## Individual Marketplace Curriculum

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

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

Rating: ★★★★★ Rate

**Description:**

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

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

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

**Required Training Due**

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

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

**Required**

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

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



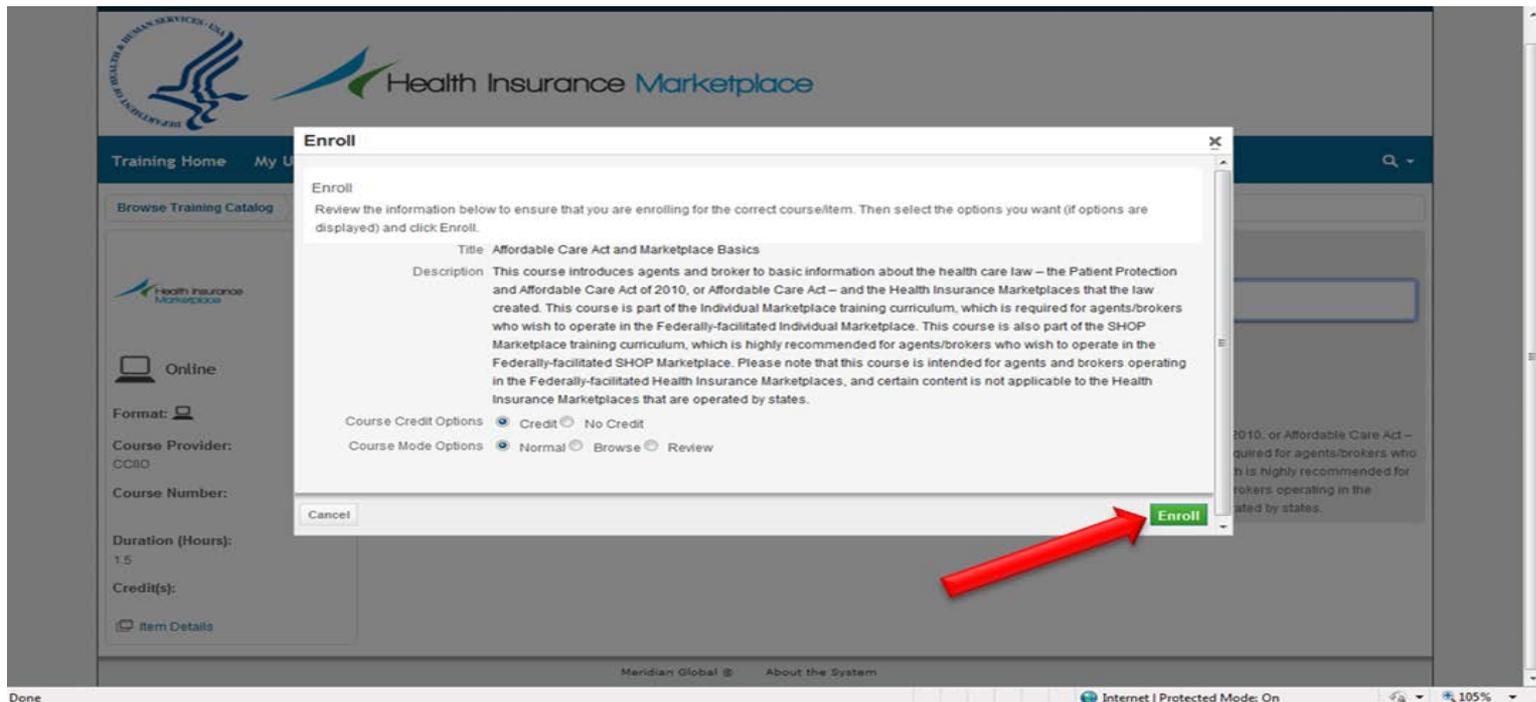
# Part I: Medicare Learning Network® (Step 7)

Step 7. Click the green 'Enroll' button.

The screenshot displays the Medicare Learning Network website interface. At the top left is the Department of Health & Human Services logo, and next to it is the Health Insurance Marketplace logo. A navigation bar includes links for Training Home, My Upcoming Learning, Transcript, and Training Catalog, along with a search icon. Below the navigation bar, the breadcrumb trail shows 'Browse Training Catalog' and 'Individual Marketplace Curr...'. The main content area features the course title 'Affordable Care Act and Marketplace Basics'. A message box states, 'You must enroll in this item if you want to access it.' Below this message is a prominent green 'Enroll' button, which is highlighted by a red arrow. To the right of the button are five star ratings. The left sidebar contains course details: 'Online' format, 'Course Provider', 'Course Number', 'Duration (Hours): 1.5', and 'Credit(s)'. At the bottom of the sidebar is an 'Item Details' link.

# Part I: Medicare Learning Network® (Step 8)

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



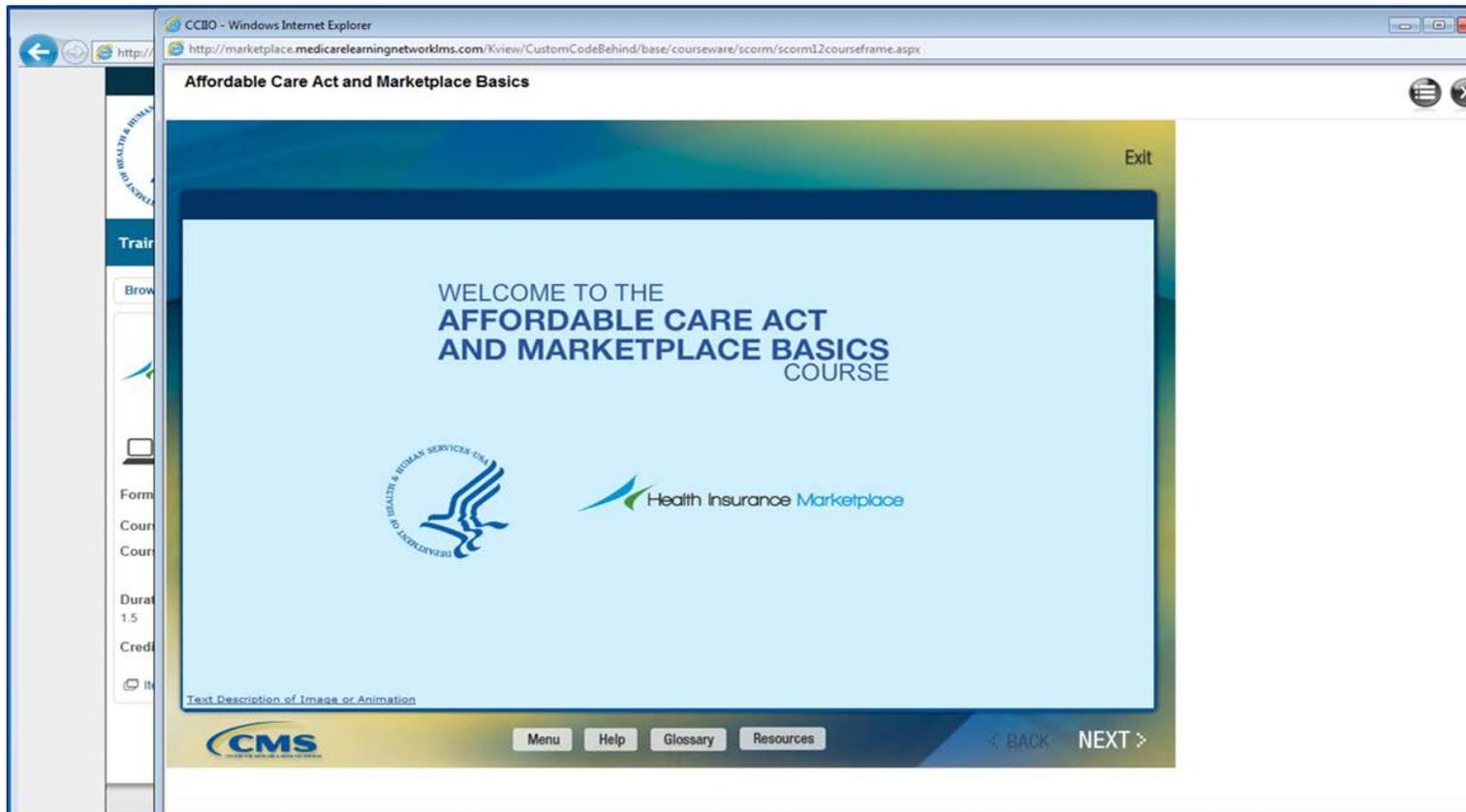
# Part I: Medicare Learning Network® (Step 9)

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

The screenshot shows the Health Insurance Marketplace website interface. At the top left is the Department of Health & Human Services logo. The main header includes navigation links: Training Home, My Upcoming Learning, Transcript, and Training Catalog. Below the header, the breadcrumb trail shows 'Browse Training Catalog' and 'Individual Marketplace Curr...'. The main content area displays the course title 'Affordable Care Act and Marketplace Basics'. A notification box states 'You enrolled in this item on 8/5/2013.' with a 'Cancel Enrollment' button. A green 'Open Item' button is highlighted with a red arrow. The course details on the left include: Online format, Course Provider, Course Number, Duration (Hours) of 1.5, and Credit(s). The description on the right explains that the course introduces agents and brokers to basic information about the health care law—the Patient Protection and Affordable Care Act of 2010, or Affordable Care Act—and the Health Insurance Marketplaces that the law created. It also notes that the course is part of the Individual Marketplace training curriculum and the SHOP Marketplace training curriculum.

# Part I: Medicare Learning Network® (Step 10)

*Step 10.* Proceed with taking the course.

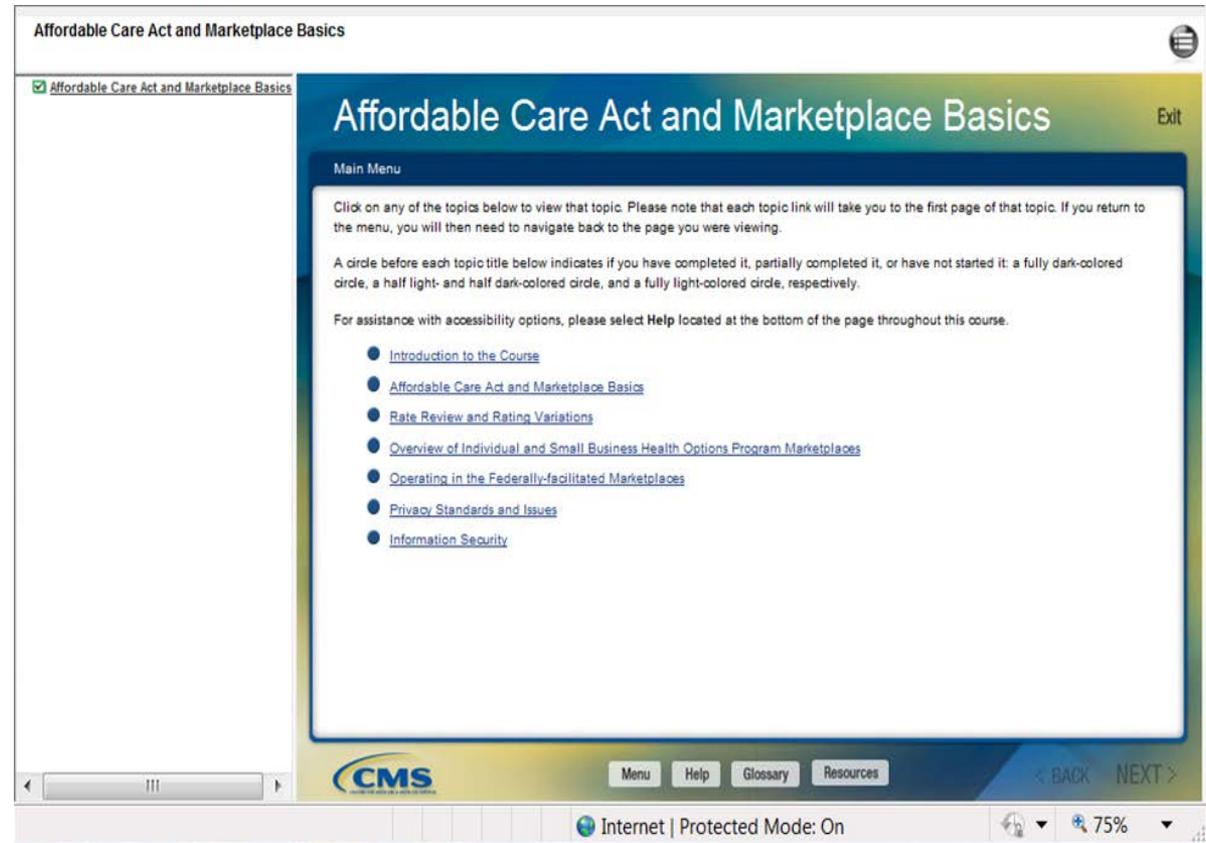


The screenshot shows a web browser window titled "CCBO - Windows Internet Explorer" with the URL <http://marketplace.medicarelearningnetworklms.com/Xview/CustomCodeBehind/base/courseware/scorm/scorm12courseframe.aspx>. The page content is titled "Affordable Care Act and Marketplace Basics" and features a large central graphic with the text "WELCOME TO THE AFFORDABLE CARE ACT AND MARKETPLACE BASICS COURSE". Below the text are the logos for the Department of Health & Human Services USA and the Health Insurance Marketplace. At the bottom of the graphic, there is a "Text Description of Image or Animation" placeholder. The page also includes a navigation menu with "Menu", "Help", "Glossary", and "Resources" buttons, and "BACK" and "NEXT" navigation arrows. A sidebar on the left contains a "Train" section with a "Browse" button and a "Form" section with "Course" and "Course" labels. The duration is listed as "1.5" and the credit is listed as "Cred".

# Part I: Menu Displays Within Courses

The menu page displays the topics in each course.

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



The screenshot shows a web browser window displaying the course menu for 'Affordable Care Act and Marketplace Basics'. The page title is 'Affordable Care Act and Marketplace Basics' and the URL is 'Affordable Care Act and Marketplace Basics'. The main content area is titled 'Main Menu' and contains the following text:

Click on any of the topics below to view that topic. Please note that each topic link will take you to the first page of that topic. If you return to the menu, you will then need to navigate back to the page you were viewing.

A circle before each topic title below indicates if you have completed it, partially completed it, or have not started it: a fully dark-colored circle, a half light- and half dark-colored circle, and a fully light-colored circle, respectively.

For assistance with accessibility options, please select [Help](#) located at the bottom of the page throughout this course.

- [Introduction to the Course](#)
- [Affordable Care Act and Marketplace Basics](#)
- [Rate Review and Rating Variations](#)
- [Overview of Individual and Small Business Health Options Program Marketplaces](#)
- [Operating in the Federally-facilitated Marketplaces](#)
- [Privacy Standards and Issues](#)
- [Information Security](#)

The page also features a navigation bar with buttons for 'Menu', 'Help', 'Glossary', and 'Resources', and a footer with 'Internet | Protected Mode: On' and a 75% zoom level.

# Part I: Curriculum Contents by Role

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

## Individual Marketplace Role

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

## SHOP Marketplace Role

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

## Individual and SHOP Marketplace Role

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

# Part I: Course Summaries

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

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

# Part I: Training Display on MLN Site

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

**RECENT ANNOUNCEMENTS**

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

**My Upcoming Training (4)** All ▾

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

[All My Upcoming Training](#) ⊕ Required Training 🔴 Overdue 🟡 Due Soon 🔄 Recurring Assignment

**My Completed Training (1)**

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

**SEARCH**  
 Any words

**BROWSE CATEGORIES**

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

# Part I: Bookmarking

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

The screenshot displays the 'Training Home' interface. At the top, there is a 'Loading Lesson' progress bar. A central dialog box titled 'Message from webpage' asks, 'Would you like to resume where you left the lesson previously?' with 'OK' and 'Cancel' buttons. Below the dialog is a table titled 'My Upcoming Training (4)'. The table has columns for Title, Type, Date, Status, and Action. The first row is highlighted in blue. Below the table are filters for 'All My Upcoming Training' and icons for 'Required Training', 'Overdue', 'Due Soon', and 'Recurring Assignment'. On the right side, there is a search bar and a list of categories including 'Agent/Broker - Individual Marketplace (0)', 'Agent/Broker - Individual Marketplace an... (1)', 'Agent/Broker - SHOP Marketplace (1)', 'Certified Application Counselor (0)', 'In-person Assistance Personnel (0)', and 'Navigator (0)'.

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

# Part I: Summary of Agreements

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

# Part I: Training Certificates

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

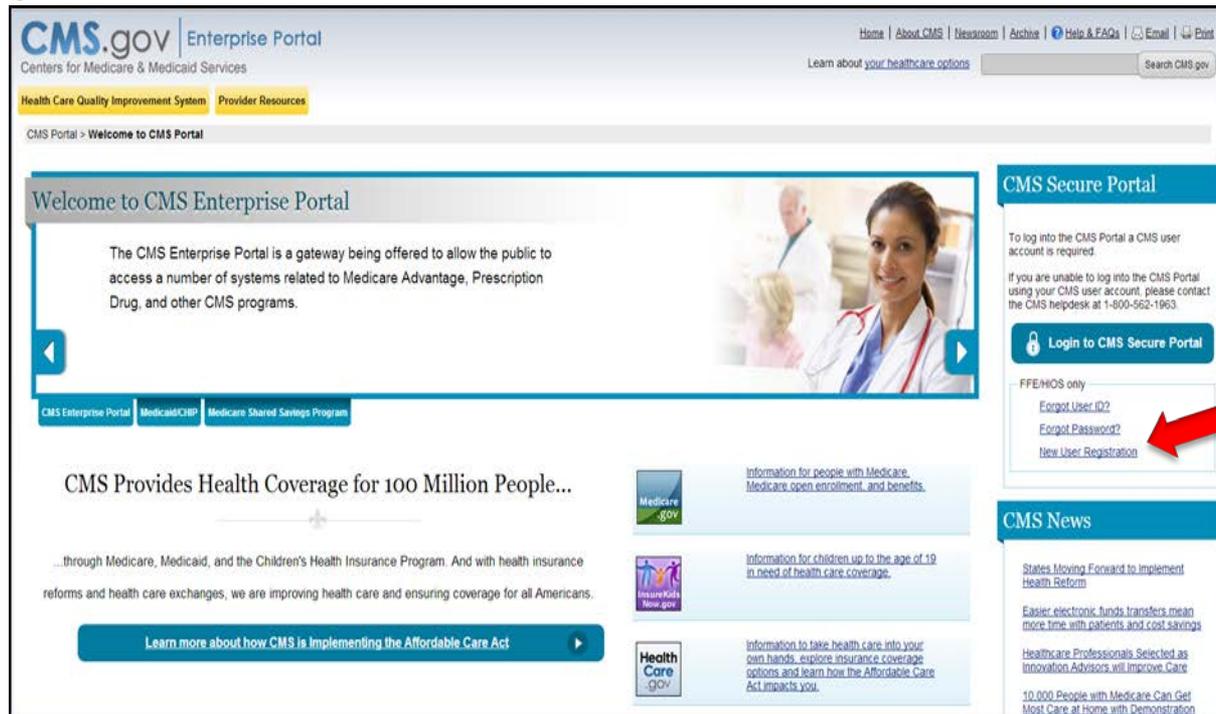
- You will receive a certificate for each curriculum you complete
- Keep these certificates for your records
- You will need to provide copies to any issuers and web-brokers with which you are affiliated

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

Questions?

# Part II: FFM User Account (Step 1)

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



The screenshot shows the CMS.gov Enterprise Portal homepage. The main navigation bar includes links for Home, About CMS, Newsroom, Archive, Help & FAQs, Email, and Print. Below the navigation bar, there are tabs for Health Care Quality Improvement System and Provider Resources. The main content area features a large banner with the text 'Welcome to CMS Enterprise Portal' and a description: 'The CMS Enterprise Portal is a gateway being offered to allow the public to access a number of systems related to Medicare Advantage, Prescription Drug, and other CMS programs.' To the right of the banner is a 'CMS Secure Portal' section with a 'Login to CMS Secure Portal' button and a 'New User Registration' link, which is highlighted by a red arrow. Below the banner, there are sections for 'CMS Provides Health Coverage for 100 Million People...' and 'CMS News'.

\*Note: To allow time for your training results from the MLN website to be transmitted to the CMS Enterprise Portal, you must generally wait at least two business days after completing your training, exams, and Marketplace Agreement(s) on the MLN website. During August 2013, there may be instances where this process will take longer than 2 business days

# Part II: FFM User Account (Step 2)

*Step 2.* Read the terms and conditions, then check the box next to agree to the terms and conditions.’  
Click ‘Next.’

The screenshot displays the CMS.gov Enterprise Portal registration page. At the top, it says "CMS.gov | Enterprise Portal" and "Centers for Medicare & Medicaid Services". Below this are two yellow buttons: "Health Care Quality Improvement System" and "Provider Resources". The main heading is "CMS Portal > Registration".

The "Terms and Conditions" section includes the following text:

- Consent To Monitoring**: "By logging onto this website, you consent to be monitored. Unauthorized attempts to upload information and/or change information on this web site are strictly prohibited and are subject to prosecution under the Computer Fraud and Abuse Act of 1986 and Title 18 U.S.C. Sec. 1001 and 1030. We encourage you to read the [HHS Rules of Behavior](#) for more details."
- Protecting Your Privacy**: "Protecting your Privacy is a top priority at CMS. We are committed to ensuring the security and confidentiality of the user registering to EIDM. Please read the [CMS Privacy Act Statement](#) which describes how we use the information you provide."
- Collection Of Personal Identifiable Information (PII)**: "Personal" information is described as data that is unique to an individual, such as a name, address, telephone number, social security number and date of birth (DOB). CMS is very aware of the privacy concerns around PII data. In fact, we share your concerns. We will only collect personal data to uniquely identify the user registering with the system. We may also use your answers to the challenge questions and other PII to later identify you in case you forget or misplace your User ID / Password.

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

At the bottom, there is a light blue box containing the text "I agree to the terms and conditions" followed by a checked checkbox. A red arrow points to the checkbox. Below this box are two buttons: "Cancel" and "Next". A red arrow points to the "Next" button.

# Part II: FFM User Account (Step 3)

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

Click 'Next.'

Health Care Quality Improvement System Provider Resources

CMS Portal > Registration

### Your Information

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

- First Name:  Middle Name:

- Last Name:  Suffix:

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

- E-mail Address:

Re-enter your email address.

- Confirm E-mail Address:

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

Social Security Number:

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

- Date of Birth:

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

- Home Address Line 1:

Home Address Line 2:

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

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

- Primary Phone Number:

# Part II: FFM User Account (Step 4)

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

CMS Portal > Registration

Choose User ID and Password [Create User](#) Choose User ID and Password

## Choose User ID And Password

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

- User ID

- Password

- Confirm Password

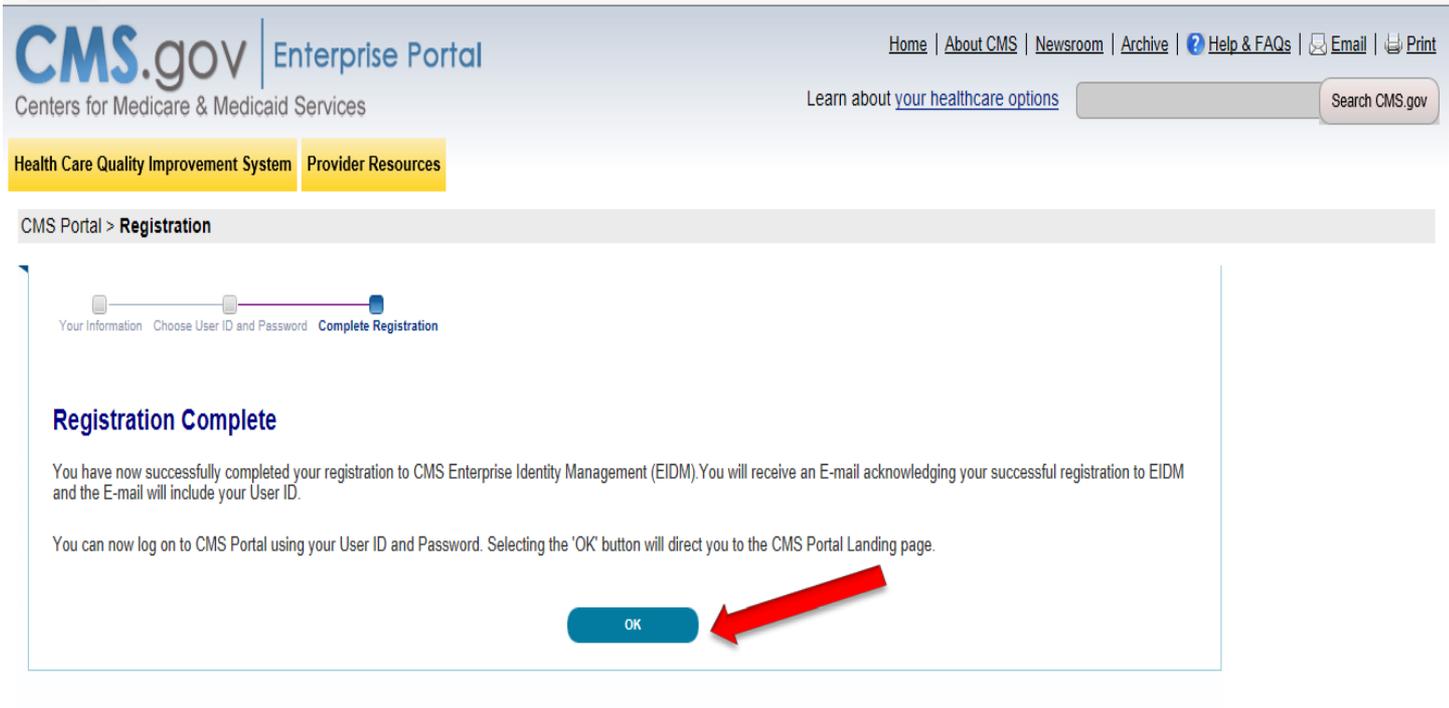
### Select your Challenge Questions and Answers:

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

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

# Part II: FFM User Account (Step 5)

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



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

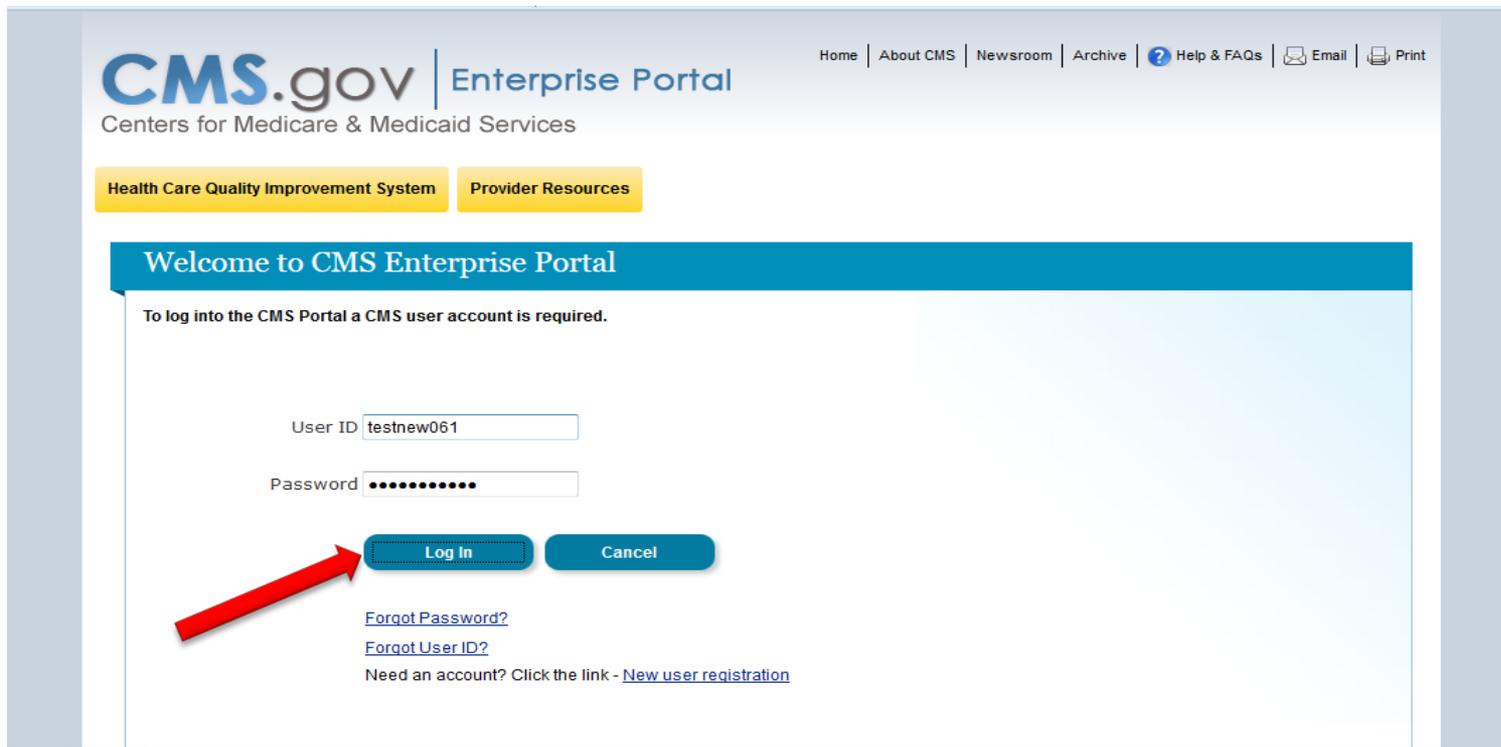
# Part II: FFM User Account (Step 6)

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

The screenshot displays the CMS.gov Enterprise Portal. At the top, the navigation bar includes links for Home, About CMS, Newsroom, Archive, Help & FAQs, Email, and Print. Below the navigation bar, there are tabs for Health Care Quality Improvement System and Provider Resources. The main content area features a large banner with the text: "Welcome to CMS Enterprise Portal. The CMS Enterprise Portal is a gateway being offered to allow the public to access a number of systems related to Medicare Advantage, Prescription Drug, and other CMS programs." To the right of the banner is a "CMS Secure Portal" section with the text: "To log into the CMS Portal a CMS user account is required. If you are unable to log into the CMS Portal using your CMS user account, please see the CMS helpdesk at 1-800-562-1111." A red arrow points to the "Login to CMS Secure Portal" button. Below this button are links for "Forgot User ID?", "Forgot Password?", and "New User Registration". The bottom of the page features a section titled "CMS Provides Health Coverage for 100 Million People..." with a "Learn more about how CMS is implementing the Affordable Care Act" button. There are also three small informational boxes on the right side of the page, each with a logo and a link to more information.

# Part II: FFM User Account (Step 7)

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



The screenshot displays the CMS.gov Enterprise Portal login interface. At the top, the CMS.gov logo is followed by 'Enterprise Portal' and 'Centers for Medicare & Medicaid Services'. Navigation links include Home, About CMS, Newsroom, Archive, Help & FAQs, Email, and Print. Below the navigation are two yellow buttons: 'Health Care Quality Improvement System' and 'Provider Resources'. A blue banner reads 'Welcome to CMS Enterprise Portal'. Below the banner, a message states: 'To log into the CMS Portal a CMS user account is required.' The login form contains two input fields: 'User ID' with the value 'testnew061' and 'Password' with masked characters. Below the fields are two buttons: 'Log In' and 'Cancel'. A red arrow points to the 'Log In' button. At the bottom of the form, there are three links: 'Forgot Password?', 'Forgot User ID?', and 'Need an account? Click the link - [New user registration](#)'.

# Part II: FFM User Account (Step 8)

*Step 8.* On the 'My Portal' page, select 'Request Access Now' under 'Request Application Access.'

**CMS .gov** Enterprise Portal

My Portal

CMS Portal > My Portal

## Welcome to CMS Enterprise Portal

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

### Provisioning

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

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

### Request Application Access

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

[Request Access Now](#)

### Contact Help Desk

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

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

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

# Part II: FFM User Account (Step 9)

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

The screenshot shows the CMS.gov Enterprise Portal interface. At the top left is the logo "CMS.gov | Enterprise Portal". Below it is a yellow "MyPortal" button. A breadcrumb trail reads "CMS Portal > My Access". The main content area is split into two columns. The left column is titled "My Access" and contains two links: "Request New Application Access" (highlighted with a red arrow) and "View and Manage My Access". The right column is titled "View and Manage My Access" and contains a table with two columns: "Application" and "Take An Action". The "Application" column contains a table with one row: "Request New Application Access" and "Please request access to an application." The "Take An Action" column contains a button labeled "Take An Action". A tooltip "Goto Request New Application Access" is visible over the link.

# Part II: FFM User Account (Step 10)

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

The screenshot displays the CMS Enterprise Portal interface. At the top, there is a navigation bar with links for 'Portal Help & FAQs', 'Print', 'Log Out', and a user greeting 'Welcome Dilly Peterson'. Below this is the CMS .gov logo and the text 'Enterprise Portal'. A yellow 'MyPortal' button is visible. The main content area is titled 'CMS Portal > My Access'. On the left, there is a 'My Access' sidebar with links for 'Request New Application Access' and 'View and Manage My Access'. The main content area is titled 'Request New Application Access' and contains the instruction 'Select an application and then a role to request access.' Below this, there is a label '- Application Description:' followed by a dropdown menu. The dropdown menu is open, showing a list of applications: 'Select the Application', 'QMAT - Quality Measures Assessment Tool Application', 'SHOP - SHOP Application', 'ABC - ABC Application', 'HIOS - HIOS Application', 'FFM - FFM Application' (which is highlighted in blue), 'TESTMFA - Test Application', 'ZONE - ZONE Application', 'EIDM - EIDM Application', and 'EIDMSTEPUP - EIDMSTEPUP Test Application'. A search box is visible within the dropdown menu, containing the text 'FFM - FFM Application'.

# Part II: FFM User Account (Step 11)

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

Portal Help & FAQs | Print | Log Out | Welcome Dilly Peterson

CMS .gov | Enterprise Portal

MyPortal

CMS Portal > My Access

### My Access

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

### Request New Application Access

Select an application and then a role to request access.

- Application Description: FFM - FFM Application

- Role: FFM Agent Broker

Agent/Broker

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

# Part II: FFM User Account (Step 12)

*Step 12.* Enter your NPN and MLN User ID. When finished, click 'Submit.'

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

## My Access

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

## Request New Application Access

Select an application and then a role to request access.

\* Application Description:

\* Role:

Enter validation data

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

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

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

\* NPN:

\* MLN UID:

Cancel

Submit



# Part II: FFM User Account (Step 13)

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

The screenshot displays the CMS Enterprise Portal interface. At the top, there is a navigation bar with links for 'Portal Help & FAQs', 'Print', 'Log Out', and a user greeting 'Welcome Dilly Peterson'. Below this is the 'CMS.gov Enterprise Portal' header and a 'MyPortal' tab. The main content area is titled 'CMS Portal > My Access' and is divided into two columns. The left column, 'My Access', contains links for 'Request New Application Access' and 'View and Manage My Access'. The right column, 'Remote Identity Proofing', contains a paragraph of text and a bulleted list of instructions. At the bottom of the right column, there are two buttons: 'Cancel' and 'Next'. A red arrow points to the 'Next' button.

Portal Help & FAQs | Print | Log Out | Welcome Dilly Peterson

CMS.gov Enterprise Portal

MyPortal

CMS Portal > My Access

### My Access

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

### Remote Identity Proofing

You have selected a role that requires a higher level of security. You will need to complete Identity Verification successfully, before requesting access to the selected role. Below are a few items to keep in mind.

- Ensure that you have entered your legal name, current home address, primary phone number and email address correctly. We will only collect personal information to verify your identity with Experian, an external identity verification provider.
- Identity Verification involves Experian using information from your credit report to help confirm your identity. As a result, you may see an entry called a "soft inquiry" on your Experian credit report. Soft inquiries do not affect your credit score and you do not incur any charges related to them.
- Confirm that you have your personal and financial information available, as the Experian application will pose questions to you, based on data in their files. You may want to obtain a copy of your credit report, before proceeding with the role request by selecting this link and following the directions provided - [Experian Link](#)

If you elect to proceed now, you will be prompted with a Terms and Conditions statement that explains how your Personal Identifiable Information (PII) is used to confirm your identity. Do you want to continue?

Cancel | Next

# Part II: FFM User Account (Step 14)

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

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

## My Access

[Request New Application Access](#)

[View and Manage My Access](#)

## Terms and Conditions

### Protecting Your Privacy

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

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

### HHS Rules Of Behavior

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

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

### Identity Verification

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

I agree to the terms and conditions

Cancel

Next

You must agree to the Terms and Conditions in order to proceed

# Part II: FFM User Account (Step 15)

## My Access

[Request New Application Access](#)

[View and Manage My Access](#)

Your Information    Verify Your Identity

### Your Information

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

- First Name:  Middle Name:

- Last Name:  Suffix:

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

- E-mail Address:

Re-enter your email address.

- Confirm E-mail Address:

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

- Social Security Number:

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

\* Date of Birth:

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

- Home Address Line 1:

Home Address Line 2:

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

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

\* Primary Phone Number:

*Step 15.* You will be prompted to enter your identifying information.

This information will be used to create the identity proofing questions

Click 'Next' when you have finished.

# Part II: FFM User Account (Steps 16)

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

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

The screenshot shows a web interface for 'Verify Your Identity'. On the left, there is a sidebar with 'My Access' and links for 'Request New Application Access' and 'View and Manage My Access'. The main content area is titled 'Verify Identity' and contains three questions, each with radio button options:

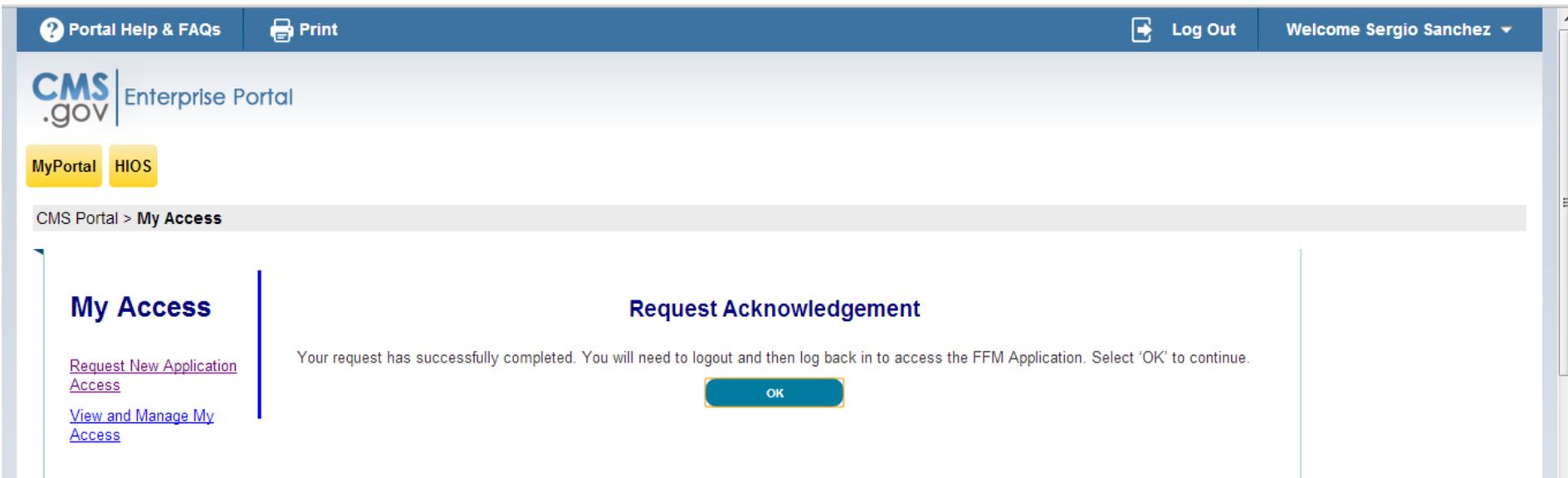
- Question 1: "I was born within a year or on the year of the date below." Options: 1960, 1963, 1966, 1969, NONE OF THE ABOVE.
- Question 2: "According to our records, you previously lived on (PHILIPS). Please choose the city from the following list where this street is located." Options: NEWBURN, NEW BERN, MIDWAY PARK, KINSTON, NONE OF THE ABOVE.
- Question 3: "Which of the following is a current or previous employer? If there is not a matched employer name, please select 'NONE OF THE ABOVE'." Options: ORGANIC PRODUCTS, SAFEWAY, CODA ACQUISITION GROUP, JOSE GUERRERO, NONE OF THE ABOVE.

Below the questions is another question: "Which of the following is a previous phone number of yours? If there is not a matched phone number, please select 'NONE OF THE ABOVE'." Options: (352)221-7053, (352)212-8365, (352)214-4270, (352)233-3271, NONE OF THE ABOVE.

At the bottom of the form are two buttons: 'Cancel' and 'Next'. A red arrow points to the 'Next' button, with the text "Answer Out-of-Wallet Questions and select 'Next.'" next to it.

# Part II: FFM User Account (Steps 17)

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



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

# Annual Registration Renewal

On an annual basis, agents and brokers participating in the Individual Marketplace must:

- Re-take the Affordable Care Act and Marketplace Basics and Individual Marketplace courses and pass the corresponding exams
- Re-accept the Individual Marketplace Agreements

Agents and brokers participating in the SHOP Marketplace:

- Are not required, but are strongly encouraged, to re-take the Affordable Care Act and Marketplace Basics and SHOP Marketplace courses and take the corresponding exams on an annual basis
- Are required to re-accept the SHOP Marketplace Agreement on an annual basis

# Participating In The Federally-facilitated Marketplaces

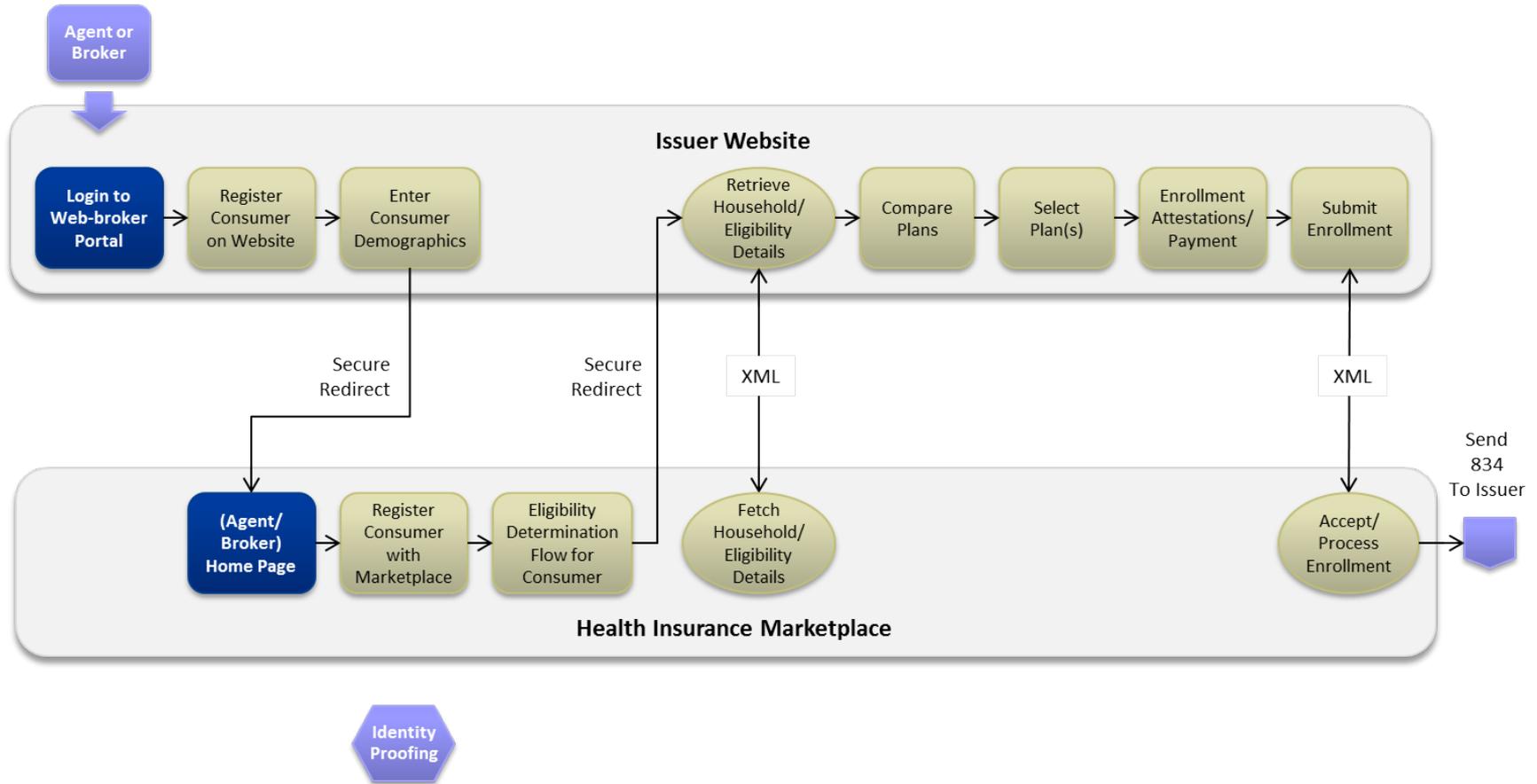


**Assisting  
Consumers with  
Eligibility  
Determinations  
and Enrollment**

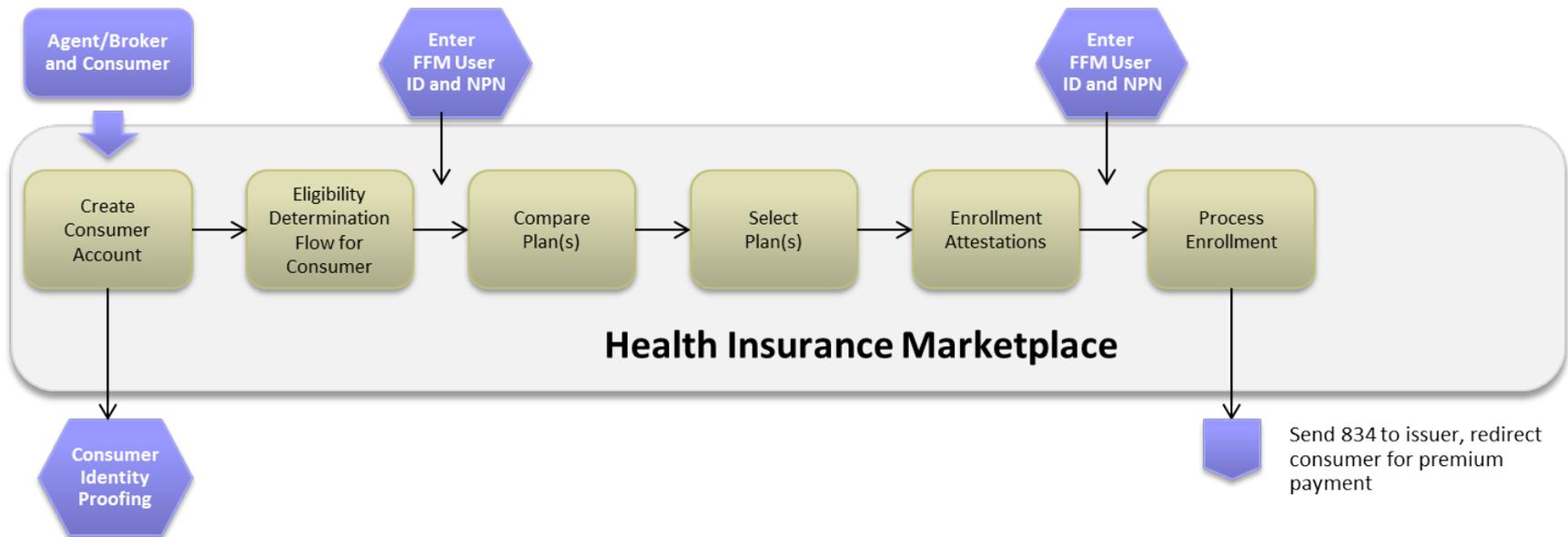
# Pathways to Assist Consumers

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

# Direct Enrollment Pathway



# Marketplace Pathway



# Participating In The Federally-facilitated Marketplaces



## Additional Resources

# Resources

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

Questions?