

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

Health  
Care  
.gov

Centers for Medicare & Medicaid Services (CMS)  
Center for Consumer Information & Insurance Oversight (CCIIO)  
*August 10, 2022*



# Disclaimer



*The information provided in this presentation is intended only as a general, informal summary of technical legal standards. It is not intended to take the place of the statutes, regulations, and formal policy guidance that it is based upon. This presentation summarizes current policy and operations as of the date it was presented. Links to certain source documents have been provided for your reference. We encourage audience members to refer to the applicable statutes, regulations, and other interpretive materials for complete and current information about the requirements that apply to them. 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).*

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

# Agenda



- | **01** Introduction
- | **02** Plan Year 2023 Marketplace Registration and Training Process
- | **03** Agent and Broker Resources
- | **04** Help Desk and Call Center Support
- | **05** Helpful Updates and Upcoming Webinars

# Intended Audience



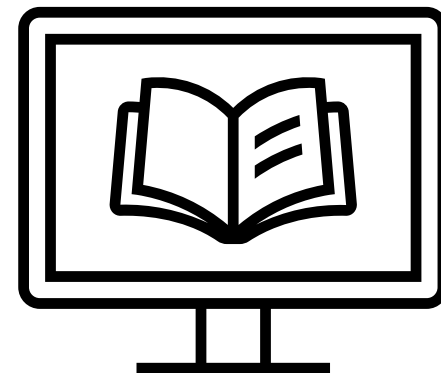
- » The intended audience for this presentation includes 1) agents and brokers joining the Marketplace for the first time for Plan Year 2023 and 2) agents and brokers who participated in a previous Plan Year but did not complete Plan Year 2022 Marketplace registration and training. Agents and brokers who completed Plan Year 2022 registration and training should register for tomorrow's webinar titled, "Plan Year 2023 Health Insurance Marketplace® Registration and Training for Returning Agents and Brokers." Registration will be closing soon, so please do that now.
- » "New" agents and brokers who did not complete registration and training for Plan Year 2022 are required to complete the full Individual Marketplace training for Plan Year 2023 if assisting with Individual Marketplace enrollments. Completing full registration and training for Plan Year 2023 will require the completion of not just registration and training, but also of an exam with at least a 70% accuracy and the execution of the applicable Marketplace Agreements.

# Introduction to Agents and Brokers for Plan Year 2023



## ***Welcome to the Marketplace for Plan Year 2023!\****

- » To the extent permitted by states, licensed agents and brokers assist consumers in applying for insurance affordability programs, including the premium tax credit and cost-sharing reductions, and enrolling in qualified health plans (QHPs) through the Marketplace.
- » Agents and brokers also play a crucial role in educating consumers about the Marketplace, both during the annual Open Enrollment period and throughout the Plan Year.



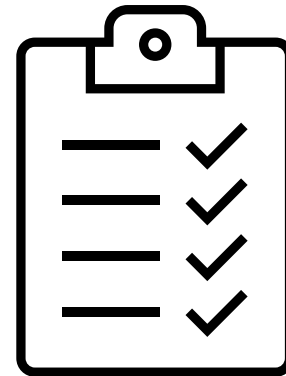
*\*45 CFR § 155.20 defines "Plan Year" as a consecutive 12-month period during which a health plan provides coverage for health benefits. A Plan Year may be a calendar year or otherwise.*

# Introduction to Agents and Brokers for Plan Year 2023 (Continued)



Prior to assisting consumers, agents and brokers should:

- » Understand the standards under [45 CFR § 155.220](#), which authorize agents and brokers to assist consumers with selecting and enrolling in QHPs offered through the Marketplace.
- » Be familiar with [45 CFR § 155.260](#), which outlines the limits on how agents and brokers may use any information gained as part of providing assistance to a consumer.



To better understand the standards under 45 CFR §§ 155.220 and 155.260, review the guidance on the Centers for Medicare & Medicaid Services (CMS) [Agents and Brokers Resources webpage](#).



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

# Step 1: Create a CMS Enterprise Portal Account



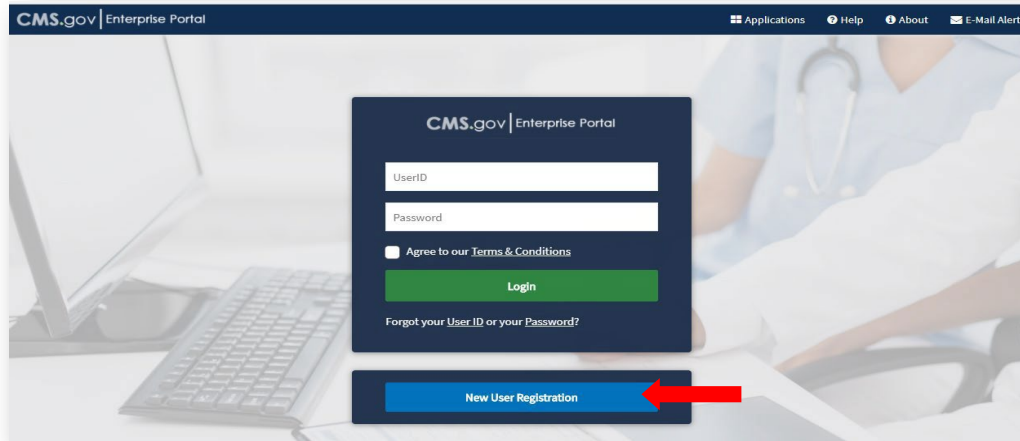
- 1. Create a CMS Enterprise Portal Account.**
2. Request the Agent and Broker Training Access Role.
3. Complete Remote Identity Proofing through the Identity Management (IDM) System.
4. Complete the Agent and Broker Profile on the Marketplace Learning Management System (MLMS) via the CMS Enterprise Portal.
5. Complete Marketplace Training on the MLMS or through an HHS-approved Vendor via the CMS Enterprise Portal.
6. Read and Accept the Applicable Marketplace Agreement(s) on the MLMS.
7. Confirm Completion of all Registration Steps by logging back into the CMS Enterprise Portal and printing the Completion Certificate.



# Step 1: Create a CMS Enterprise Portal Account (Continued)



- » If an agent or broker does not already have a CMS Enterprise Portal account\*, they should navigate to <https://portal.cms.gov> and click the “New User Registration” button.



*\*Agents and brokers that already have a CMS Enterprise Portal account do not need to create a new one. Agents and brokers should log in with an existing FFM User ID and password and proceed to Step 2. For agents and brokers who are unsure if they already have an FFM User ID and password, see the [“Avoiding the Creation of a Duplicate CMS Enterprise Portal Account”](#) resource on the Agents and Brokers Resources webpage.*

# Step 1: Create a CMS Enterprise Portal Account (Continued)



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

CMS.gov | Enterprise Portal

Applications Help About Email Alerts

### Step #1: Select Your Application

Step 1 of 3 - Select your application from the dropdown. You will then need to agree to the terms & conditions.

Select Your Application

fd

Electronic Correspondence Referral System (ECRS) Web

Federally Facilitated Marketplace (FFM)/Request for MLMS Training Access

A federal government website managed by the U.S. Centers for Medicare & Medicaid Services. 7500 Security Boulevard, Baltimore, MD 21244

How can I help you?

# Step 1: Create a CMS Enterprise Portal Account (Continued)



- » After reading and agreeing to the Terms & Conditions, click the check box next to “I Agree to the Terms and Conditions ”and then click “Next.”

CMS.gov | Enterprise Portal

Applications Help About Email Alerts

## Step #1: Select Your Application

Step 1 of 3 - Select your application from the dropdown. You will then need to agree to the terms & conditions.

Federally Facilitated Marketplace (FFM)/Request for MLMS Training Access

with the system. We may also use your answers to the challenge questions and other PII to later identify you in case you forget or misplace your User ID /Password.

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

☒ I agree to the Terms and Conditions

Next

How can I help you?

# Step 1: Create a CMS Enterprise Portal Account (Continued)



- » Enter the requested information and click "Next."

### Step #2: Register Your Information

Step 2 of 3 - Please enter your personal and contact information.  
All fields are required unless marked (optional).

Select Birth Month

Select Birth Date

Select Birth Year

Is Your Address U.S. Based?

☒ Yes ☐ No

Enter Home Address Line 1

Enter Home Address 2 (optional)

Enter City

Select State

Enter ZIP Code

Enter Zip+4 Code (optional)

Enter Email Address

Confirm Email Address

Enter Phone Number

Back

Next

Cancel

# Step 1: Create a CMS Enterprise Portal Account (Continued)





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


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

Step 3 of 3 - Please create User ID and Password. Select a Security Question and provide Answer.  
All fields are required unless marked (optional).

Enter User ID


Enter Password  Confirm Password 

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

Select Security Question 

Enter Security Answer

[Back](#) [Next](#) [Cancel](#)

A red arrow points to the "Next" button, which is highlighted in green.

# Step 1: Create a CMS Enterprise Portal Account (Continued)



- » Review the information entered, make any necessary changes, and then click “Submit User.”

**New User Registration Summary**  
Please review your information and make any necessary changes before submitting.

Federally Facilitated Marketplace (FFM)/Request for MLMS Training Access

First Name: First Name, Enter Middle Name (optional), Last Name: LastName, Suffix (optional):

Birth Month: January, Birth Date: 1, Birth Year: 1986

Home Address Line 1: 666 Far Far Away Lane, Enter Home Address 2 (optional):

City: Orlando, State: Florida, ZIP Code: 32789, Enter ZIP+4 Code (optional):

Email Address: name.lastname@email.com, Confirm Email Address: name.lastname@email.com

Phone Number: 240-777-6654

All fields are required unless marked (optional).

User ID: admin111

Enter Password: [password], Confirm Password: [password]

Security Question: What is the food you least liked as a child?

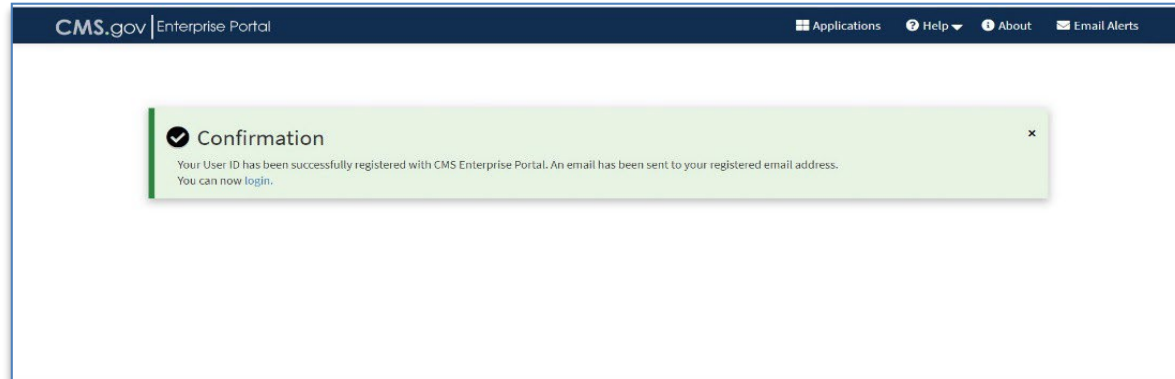
Security Answer: broccoli

**Submit User**

# Step 1: Create a CMS Enterprise Portal Account (Continued)



- » The Confirmation page is displayed to acknowledge successful registration.
- » The agent or broker will receive an email at the address listed in their account, notifying them that their account was successfully created.



Remember! An agent or broker must log in to the CMS Enterprise Portal and change their password every 180 days to maintain system access.

# Step 1: Create a CMS Enterprise Portal Account (Continued)



- » Multi-factor Authentication (MFA) is now required for all agents and brokers. The first time an agent or broker logs in after creating an account, they will be prompted to select an MFA device. The agent or broker will receive a code through this device each time they log in.

A screenshot of a web interface for registering a Multi-Factor Authentication (MFA) device. The background is dark blue. At the top, there is a white checkmark icon followed by the heading "Register Multi-Factor Authentication (MFA) Device" in white. Below this, a paragraph in white text explains that adding an MFA code to the login can make the login more secure by providing an extra layer of protection to the User ID and Password. Underneath the paragraph is the instruction "Select the MFA device type to register" in white. A white dropdown menu is open, showing the text "Select MFA Device" at the top with a downward arrow. Below this, a list of options is displayed: "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



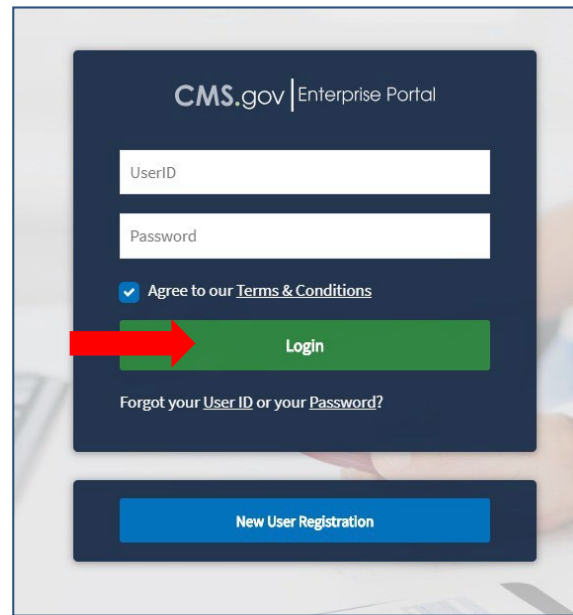
# Step 2: Request the Agent and Broker Training Access Role



1. Create a CMS Enterprise Portal Account.
- 2. Request the Agent and Broker Training Access Role.**
3. Complete Remote Identity Proofing through IDM System.
4. Complete the Agent and Broker Profile on the MLMS via the CMS Enterprise Portal.
5. Complete Marketplace Training on the MLMS or through an HHS-approved Vendor via the CMS Enterprise Portal.
6. Read and Accept the Applicable Marketplace Agreement(s) on the MLMS.
7. Confirm Completion of all Registration Steps by logging back into the CMS Enterprise Portal and printing the Completion Certificate.

# Step 2: Request the Agent and Broker Training Access Role (Continued)

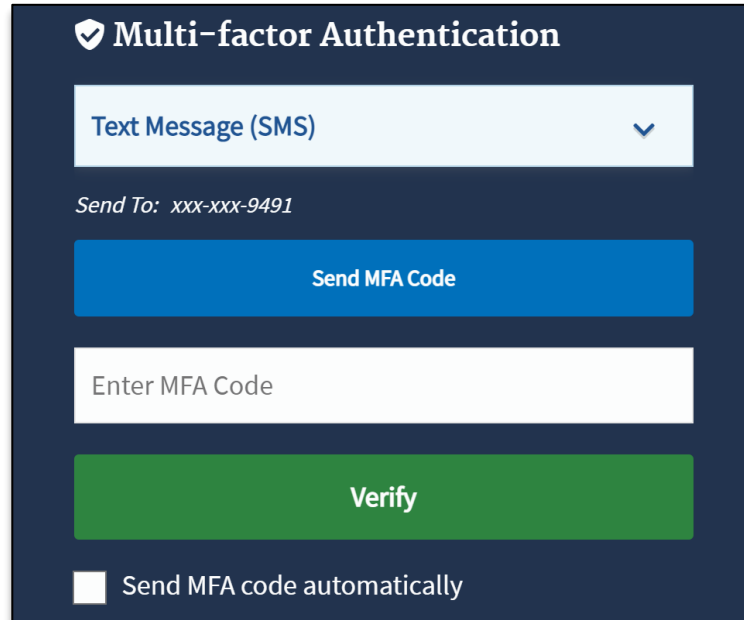
- » Once an account creation notification is received via email, or after waiting a few minutes for the system to update, log back into the CMS Enterprise Portal at <https://portal.cms.gov>.
- » Enter an FFM User ID and the password created when setting up the CMS Enterprise Portal account in Step 1.
- » After reading, click the check box next to "Agree to our Terms & Conditions" and then click "Login."



*Note: Even if an agent or broker participated in the Marketplace for prior Plan Years 2014 through 2021, they will need to request the FFM Agent and Broker training access role when they log in to their CMS Enterprise Portal account if they did not complete registration for Plan Year 2022.*

# Step 2: Request the Agent and Broker Training Access Role (Continued)

- » Upon log in, the agent or broker will be prompted to enter an MFA code received through the device registered in Step 1.



**Multi-factor Authentication**

Text Message (SMS) ▼

Send To: xxx-xxx-9491

Send MFA Code

Enter MFA Code

Verify

☐ Send MFA code automatically

## Step 2: Request the Agent and Broker Training Access Role (Continued)

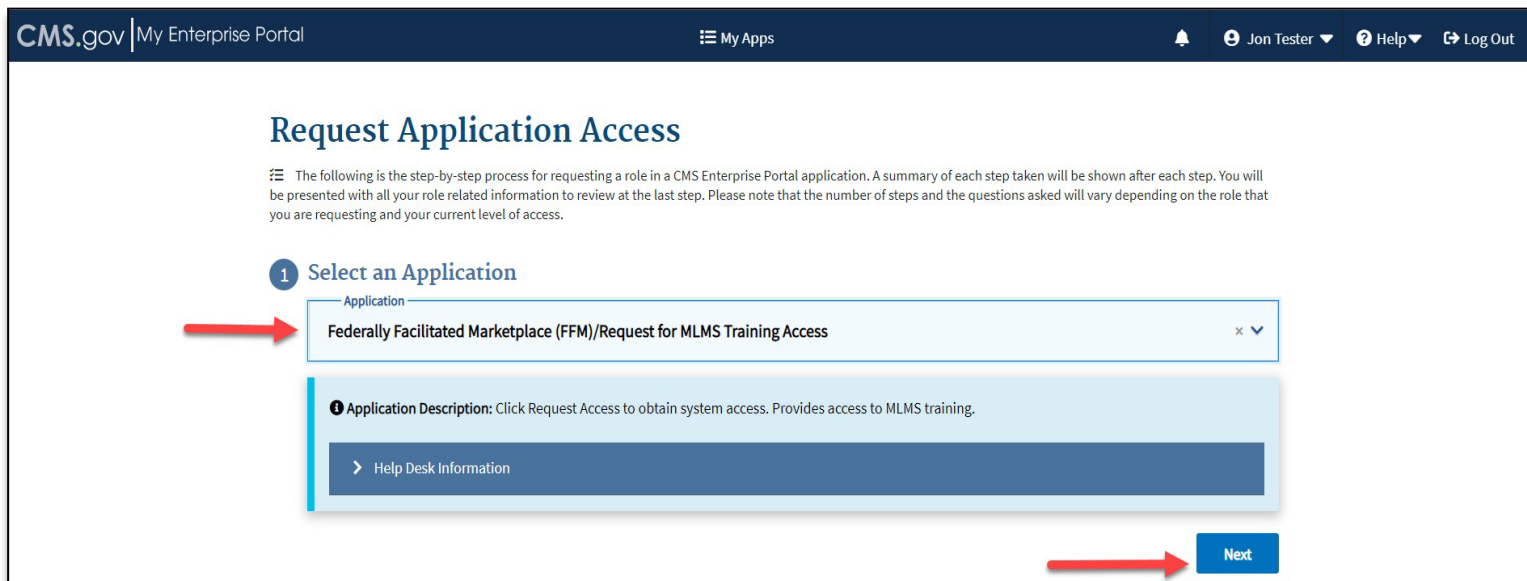


- » On the “My Portal” page, click the “Add Application” button to access the Application Catalog.



# Step 2: Request the Agent and Broker Training Access Role (Continued)

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



CMS.gov | My Enterprise Portal

My Apps

Jon Tester

Help

Log Out

## Request Application Access

The following is the step-by-step process for requesting a role in a CMS Enterprise Portal application. A summary of each step taken will be shown after each step. You will be presented with all your role related information to review at the last step. Please note that the number of steps and the questions asked will vary depending on the role that you are requesting and your current level of access.

- Select an Application**

Application

Federally Facilitated Marketplace (FFM)/Request for MLMS Training Access

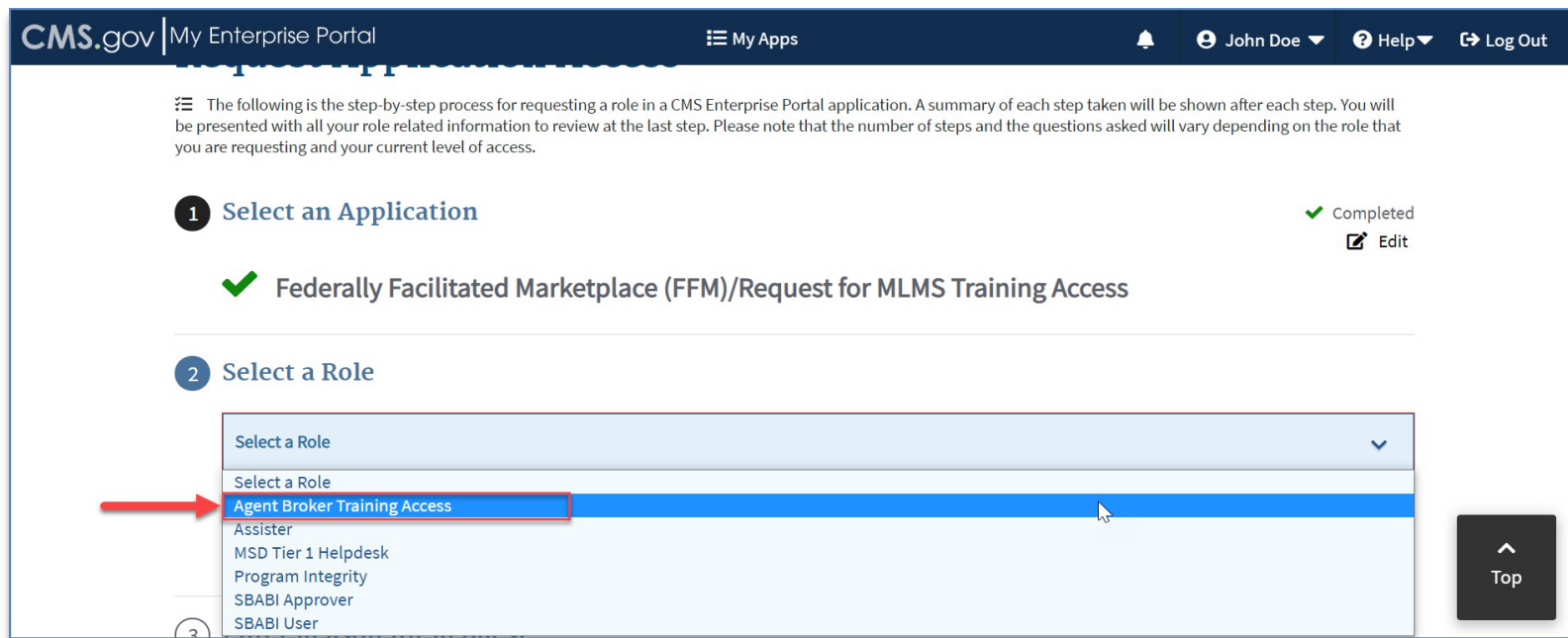
**Application Description:** Click Request Access to obtain system access. Provides access to MLMS training.

> Help Desk Information

Next

# Step 2: Request the Agent and Broker Training Access Role (Continued)

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



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, a user profile for "John Doe", a "Help" link, and a "Log Out" button. Below the navigation bar, a message states: "The following is the step-by-step process for requesting a role in a CMS Enterprise Portal application. A summary of each step taken will be shown after each step. You will be presented with all your role related information to review at the last step. Please note that the number of steps and the questions asked will vary depending on the role that you are requesting and your current level of access."

The main content area shows a progress indicator with two steps:

- 1 Select an Application** (Completed) with an "Edit" link.
- 2 Select a Role** (Current step)

Under step 2, a dropdown menu titled "Select a Role" is open. A red arrow points to the "Agent Broker Training Access" option, which is highlighted in blue. Other visible options in the dropdown include "Assister", "MSD Tier 1 Helpdesk", "Program Integrity", "SBABI Approver", and "SBABI User". A "Top" button is located in the bottom right corner of the form area.

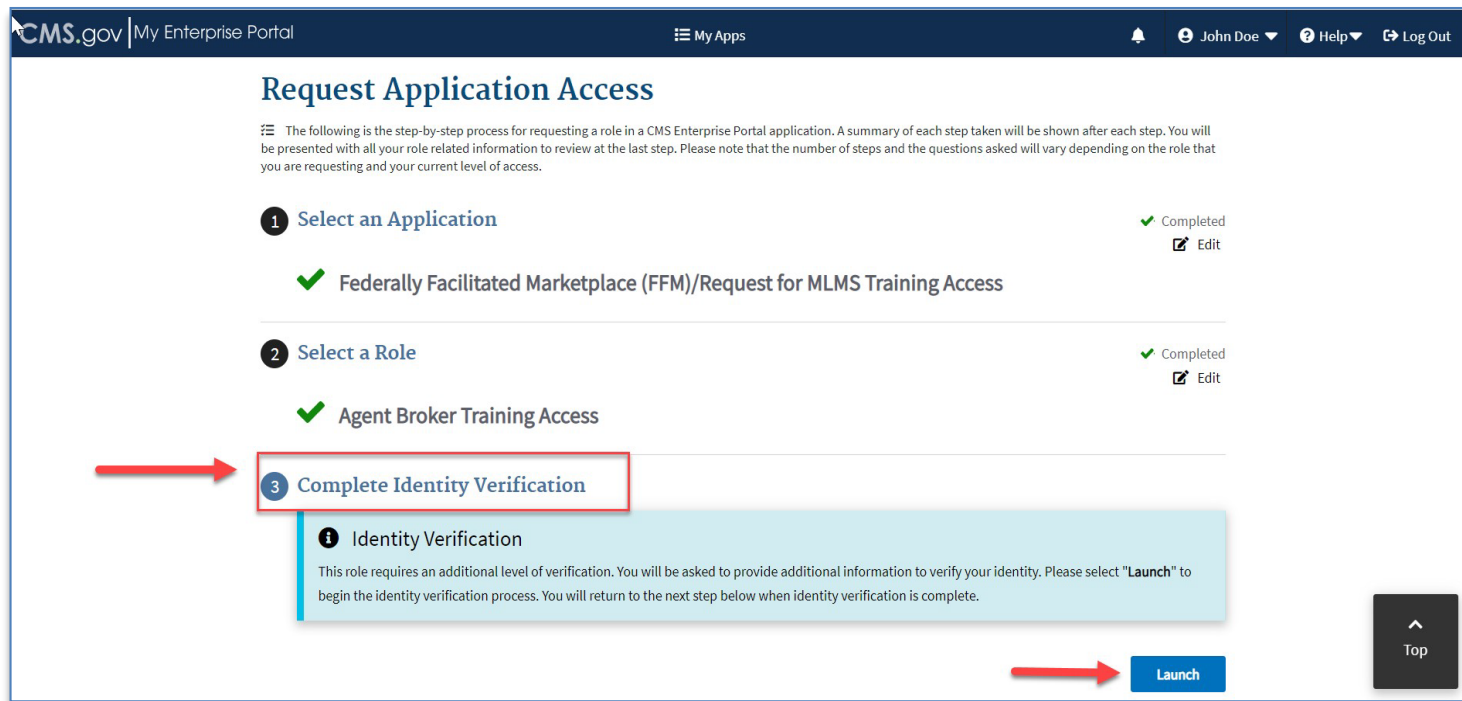
# Step 3: Complete Remote Identity Proofing through the Identity Management (IDM) System



1. Create a CMS Enterprise Portal Account.
2. Request the Agent and Broker Training Access Role.
- 3. Complete Remote Identity Proofing through the IDM System.**
4. Complete the Agent and Broker Profile on the MLMS via the CMS Enterprise Portal.
5. Complete Marketplace Training on the MLMS or through an HHS-approved Vendor via the CMS Enterprise Portal.
6. Read and Accept the Applicable Marketplace Agreement(s) on the MLMS.
7. Confirm Completion of all Registration Steps by logging back into the CMS Enterprise Portal and printing the Completion Certificate.

# Step 3: Complete Remote Identity Proofing through the IDM System (Continued)

- » Click the blue “Launch” button to launch Identity Proofing.



**CMS.gov** | My Enterprise Portal

My Apps

John Doe Help Log Out

## Request Application Access

The following is the step-by-step process for requesting a role in a CMS Enterprise Portal application. A summary of each step taken will be shown after each step. You will be presented with all your role related information to review at the last step. Please note that the number of steps and the questions asked will vary depending on the role that you are requesting and your current level of access.

- 1 Select an Application** ✓ Completed  
[Edit](#)  
✓ Federally Facilitated Marketplace (FFM)/Request for MLMS Training Access
- 2 Select a Role** ✓ Completed  
[Edit](#)  
✓ Agent Broker Training Access
- 3 Complete Identity Verification**

**i Identity Verification**

This role requires an additional level of verification. You will be asked to provide additional information to verify your identity. Please select “Launch” to begin the identity verification process. You will return to the next step below when identity verification is complete.

**Launch**

[Top](#)



# Step 3: Complete Remote Identity Proofing through the IDM System (Continued)

- » Step #1: Identity Verification Overview
  - After reading the instructions, click “Next.”

## Step #1: Identity Verification Overview

To protect your privacy, you will need to complete Identity Verification successfully, before requesting access to the selected role. Below are a few items to keep in mind.

1. Ensure that you have entered your legal name, current home address, phone number, date of birth and email address correctly. We will only collect personal information to verify your identity with Experian, an external Identity Verification provider.
2. Identity Verification involves Experian using information from your credit report to help confirm your identity. As a result, you may see an entry called a “soft inquiry” on your Experian credit report. Soft inquiries do not affect your credit score and you do not incur any charges related to them.
3. You may need to have access to your personal and credit report information, as the Experian application will pose questions to you, based on data in their files. For additional information, please see the Experian Consumer Assistance website - <http://www.experian.com/help/>

If you elect to proceed now, you will be prompted with a Terms and Conditions statement that explains how your Personal Identifiable Information (PII) is used to confirm your identity. To continue this process, select ‘Next’.



# Step 3: Complete Remote Identity Proofing through the IDM System (Continued)

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

### Step #2: Accept Terms & Conditions

OMB No. 0938-1236 | Expiration Date: 04/30/2017 | (OMB Re-Certification Pending) | [Paperwork Reduction Act](#)

#### 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 agree to the Terms & Conditions

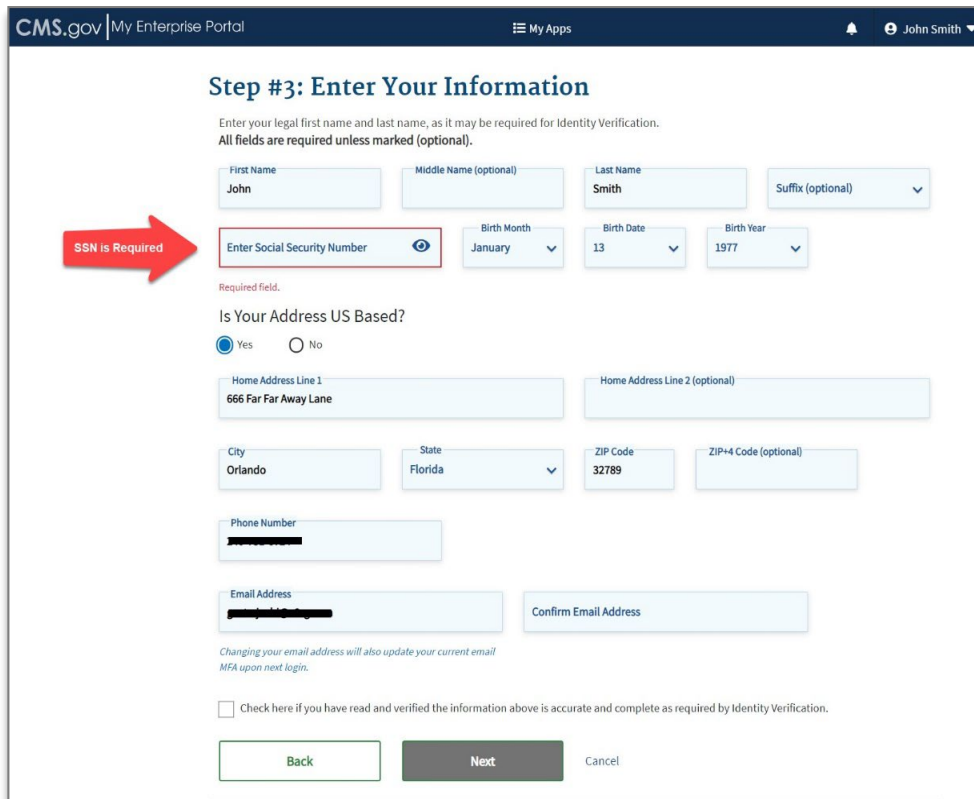
Back

Next

Cancel

# Step 3: Complete Remote Identity Proofing through the IDM System (Continued)

- » Step #3: Enter Your Information
  - Confirm the information that automatically populates and enter any missing information (e.g., confirm email address, enter Social Security number).
  - Then click "Next" to submit the information for verification.



CMS.gov | My Enterprise Portal My Apps John Smith

### Step #3: Enter Your Information

Enter your legal first name and last name, as it may be required for Identity Verification.  
All fields are required unless marked (optional).

First Name: John Middle Name (optional): Last Name: Smith Suffix (optional):

Enter Social Security Number Birth Month: January Birth Date: 13 Birth Year: 1977

Required field.

Is Your Address US Based?  
☒ Yes ☐ No

Home Address Line 1: 666 Far Far Away Lane Home Address Line 2 (optional):

City: Orlando State: Florida ZIP Code: 32789 ZIP+4 Code (optional):

Phone Number: [Redacted]

Email Address: [Redacted] Confirm Email Address:

Changing your email address will also update your current email MFA upon next login.

☐ Check here if you have read and verified the information above is accurate and complete as required by Identity Verification.

Back Next Cancel

## Step 4: Complete the Agent and Broker Profile on the Marketplace Learning Management System (MLMS) via the CMS Enterprise Portal

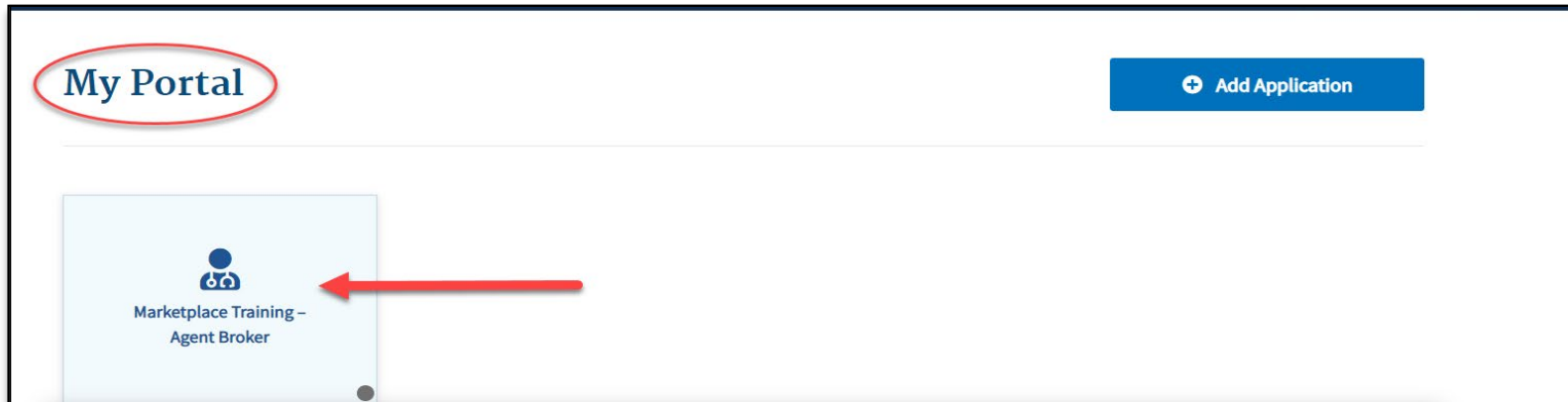


1. Create a CMS Enterprise Portal Account.
2. Request the Agent and Broker Training Access Role.
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- 4. Complete the Agent and Broker Profile on the MLMS via the CMS Enterprise Portal.**
5. Complete Marketplace Training on the MLMS or through an HHS-approved Vendor via the CMS Enterprise Portal.
6. Read and Accept the Applicable Marketplace Agreement(s) on the MLMS.
7. Confirm Completion of all Registration Steps by logging back into the CMS Enterprise Portal and printing the Completion Certificate.

## Step 4: Complete the Agent and Broker Profile on the MLMS via the CMS Enterprise Portal (Continued)



- » After completing identity proofing, an agent or broker will need to create their MLMS profile prior to beginning training.
- » To access the MLMS profile and the CMS-developed training, click on the “Marketplace Training – Agent and Broker” tile.



# Step 4: Complete the Agent and Broker Profile on 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 bar is dark blue with the CMS.gov logo, "My Enterprise Portal" text, a "My Apps" menu icon, a notification bell, a user profile for "Sarah Edwards" with a dropdown arrow, a "Help" icon, and a "Log Out" button. The main content area has a white background with a blue border. It contains a message: "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 message is a dropdown menu labeled "Agent Type \*". The dropdown is open, showing two options: "Agent Broker" (highlighted in blue) and "Non Agent Broker". To the right of the dropdown is a "Save" button.

# Step 4: Complete the Agent and Broker Profile on 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 also available in Spanish.

The screenshot shows the 'My Enterprise Portal' on CMS.gov. The page title is '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 for 'Agent Type' with 'Agent Broker' selected. A message says 'Please Select an Agent Type'. Below that is a section titled 'Find Local Help and Help On Demand options' with a collapse icon. The text inside says: 'After you complete all CMS agent/broker registration requirements, your professional contact information will be displayed on HealthCare.gov's Find Local Help features. Find Local Help is a tool accessible on HealthCare.gov to enable consumers, find local agents and brokers in their area who can provide immediate assistance with the enrollment process. You can choose to have your contact information displayed for all states where you have a valid health license, only for your home state, or not at all. Select your preference below.' There are three radio button options: 'I would like all my contact information displayed for all states where I have a valid health license.', 'I would like my contact information displayed but only for my home state, have a valid health license.', and 'I do not want my contact information displayed and do not want to participate in Find Local Help or Help On Demand.' The first option is selected. Below the options is a dropdown menu for 'Find Local Help and Help On Demand options'.

*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 plan selection and enrollment.*

# Step 4: Complete the Agent and Broker Profile on the MLMS via the CMS Enterprise Portal (Continued)



- » The MLMS profile page will appear for an agent or broker to complete their role and business and/or professional contact information.

The screenshot displays the CMS.gov My Enterprise Portal interface. The top navigation bar includes the CMS.gov logo, 'My Enterprise Portal', 'My Apps', a notification bell, the user name 'Sarah Edwards' with a dropdown arrow, a 'Help' icon, and a 'Log Out' button. 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 \*' and 'To \*' time selection fields (both set to '12:00 AM' with clock icons), and a 'Time Zone \*' dropdown menu. Below the 'Time Zone' dropdown is the text 'Please Select a Timezone'.



# Step 4: Complete the Agent and Broker Profile on 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 National Producer Number (NPN) by clicking the appropriate "+" link at the bottom of the profile page.
- » Agents and brokers can list up to three NPNs in the MLMS profile.

The screenshot shows the 'Business Entity Profile' page on the CMS.gov My Enterprise Portal. The page has a dark blue header with the CMS.gov logo, 'My Enterprise Portal', and user information (Sarah Edwards) with links for My Apps, Help, and Log Out. The main content area is titled 'Business Entity Profile' and includes a note about providing information for business entities. Below the note are several input fields: Business Entity Name \*, Business Entity Address \*, Business Entity City \*, Business State \* (dropdown), Business Entity Zip \* (with a note 'Format 5 or 9 digits'), Business Entity Phone \* (with a note 'Format 10 digits with NO dash'), Business Entity Email \*, Business Entity URL, Business Entity National ... (with a note '1 to 10 digits CANNOT start with 0'), and Confirm Business Entity ... (with a note '1 to 10 digits CANNOT start with 0'). At the bottom, there is a section for 'Web-Based Entity Profile'.

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

# Step 4: Complete the Agent and Broker Profile on the MLMS via the CMS Enterprise Portal (Continued)



- » Enter the 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 the agent or broker listed will also be complete.

The screenshot shows the 'Web-Based Entity Profile' form within the CMS Enterprise Portal. The header includes the CMS logo, 'My Enterprise Portal', 'My Apps', a user profile for Sarah Edwards, and links for Help and Log Out. The form contains several input fields with associated validation rules:

- Web Entity Name \***: 1 to 10 digits CANNOT start with 0
- Web Entity Address \***: 1 to 10 digits CANNOT start with 0
- 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 \***: 1 to 10 digits CANNOT start with 0
- Web Entity URL**: No specific format rules shown
- Web Entity National Prod...**: 1 to 10 digits CANNOT start with 0
- Web Confirm Entity Natio...**: 1 to 10 digits CANNOT start with 0

Additional instructions on the form state: '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 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).' A 'Save' button is located at the bottom right of the form.

## Step 4: Complete the Agent and Broker Profile on the MLMS via the CMS Enterprise Portal (Continued)



- » An agent or broker 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, an agent or broker can click the "Complete Agent and Broker Training" hyperlink and update the information in their MLMS profile.
  - Agent and broker NPNs can be found at [www.nipr.com/PacNpnSearch.htm](http://www.nipr.com/PacNpnSearch.htm).

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

# Step 4: Complete the Agent and Broker Profile on the MLMS via the CMS Enterprise Portal (Continued)



- » Once all profile information has been entered, click "Save."

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 large red arrow points to the **Save** button located at the bottom right of the form.

# Step 4: Complete the Agent and Broker Profile on the MLMS via the CMS Enterprise Portal (Continued)



## General MLMS Information

- » CMS validates NPNs against data stored in the [National Insurance Producer Registry \(NIPR\) Public Database](#).
  - Results of this NIPR NPN validation appear on the public [Agent and Broker Federally-facilitated Marketplace Registration Completion List \(RCL\)](#).
  - The RCL is updated daily.
- » NPN validation occurs during the annual registration process in the MLMS and is only applicable to the current Plan Year. If an agent or broker does not maintain a valid NPN, their agreements with the Marketplace may be terminated.
- » 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 4: 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 not be able to access Marketplace systems and will not be able to assist consumers with Marketplace activities for Plan Year 2023.**

## Step 4: 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 5: Complete Marketplace Training on the MLMS or through an HHS-approved Vendor via the CMS Enterprise Portal



1. Create a CMS Enterprise Portal Account.
2. Request the Agent and Broker Training Access Role.
3. Complete Remote Identity Proofing through the IDM System.
4. Complete the Agent and Broker Profile on the MLMS via the CMS Enterprise Portal.
- 5. Complete Marketplace Training on the MLMS or through an HHS-approved Vendor via the CMS Enterprise Portal.**
6. Read and Accept the Applicable Marketplace Agreement(s) on the MLMS.
7. Confirm Completion of all Registration Steps by logging back into the CMS Enterprise Portal and printing the Completion Certificate.

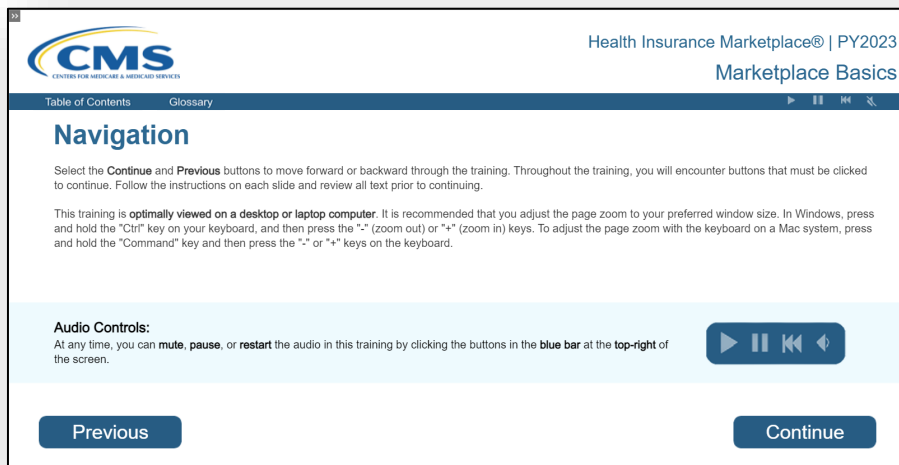


# Step 5: Complete Marketplace Training on the MLMS or through an HHS-approved Vendor via the CMS Enterprise Portal (Continued)



## Plan Year 2023 Enhancements

- » CMS has added an audio component to the training for PY 2023.
- » 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 5: Complete Marketplace Training on the MLMS or through an HHS-approved Vendor via the CMS Enterprise Portal (Continued)



- » There are two options for completing Plan Year 2023 training:
  - CMS-developed training through the MLMS (Individual Marketplace and Small Business Health Options Program [SHOP]); or
  - HHS-approved vendor (Individual Marketplace only\*).
- » An agent or broker only needs to complete training one time.
- » There is no fee associated with completing the training on the MLMS.
- » In Plan Year 2023, the HHS-approved vendor will not be charging a fee to take its training.
- » No CEUs are offered for completing training on the MLMS. The HHS-approved vendor will offer CEUs on their platform.
- » Training is only required for participation in the Individual Marketplace. Agents and brokers who participate in the SHOP are encouraged, but not required, to complete SHOP training.
- » For questions about training, contact the Agent and Broker Training and Registration Email Help Desk at [MLMSHelpDesk@cms.hhs.gov](mailto:MLMSHelpDesk@cms.hhs.gov).

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

# Step 5: Complete Marketplace Training on the MLMS or through an HHS-approved Vendor via the CMS Enterprise Portal (Continued)



- » For the Plan Year 2023 Marketplace Agent and Broker Training for new agents and brokers, the following core training modules are available:
  - Affordable Care Act Basics
  - Marketplace Basics
  - Cultural Competency
  - Eligibility for Enrolling in a QHP
  - Eligibility for Insurance Affordability Programs
  - Enrolling in a QHP
  - Privacy Standards and Definitions
  - Protecting and Handling Personally Identifiable Information
  - Information Security
  - Small Business Health Options Program (OPTIONAL)
- » There are three exams\* associated with the training:
  - Marketplace Basics Exam
  - Individual Marketplace Exam
  - Privacy and Security Exam

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

# Step 5: Complete Marketplace Training on the MLMS or through an HHS-approved Vendor via the CMS Enterprise Portal (Continued)



- » After completing their MLMS profile, agents and brokers will be redirected to the MLMS landing page.
- » Click the link in the “Training Options” box on the left sidebar.

The screenshot displays the MLMS training interface. At the top, a message states: "If assistance is required during your training, please check out The MLMS Interactive Learning Assistant (MILA). MILA is our AI driven chatbot available to assist you with your MLMS questions 24 hours a day, 7 days a week. Click the button [Ask MILA for Help](#)". Below this, it says "You can access your resource guides here:" followed by a link to [Training Resources](#).

The "Training Options" sidebar on the left contains two links: [PY2023 Agent/Broker Marketplace Training - Individual Marketplace](#) (highlighted with a red arrow) and [PY2023 Agent/Broker Small Business Health Options Program \(SHOP\) Training](#).

The main content area on the right shows a video player with a "Your Transcript" section indicating "No assigned training". Below the sidebar, there is a row of video thumbnails for training modules, including "Health Reimbursement", "Streamlined Marketplace Application Drilldown: Race and Ethnicity Questions", "A New Agent and Broker", "Streamlined Marketplace Application Drilldown: Household Seeking Financial Assistance", "Enhanced Direct", and "Streamlined Marketplace Application Drilldown: Financial Assistance".

# Step 5: Complete Marketplace Training on the MLMS or through an HHS-approved Vendor via the CMS Enterprise Portal (Continued)



- » Click the blue “Open Curriculum” button.

Health Insurance Marketplace

CURRICULUM

## PY2023 Agent/Broker Marketplace Training - Individual Marketplace

Last Updated 07/28/2022

Details

Load3

[Show More](#)

Contents 14 Trainings

PY2023 MARKETPLACE BASICS	
ONLINE CLASS	Affordable Care Acts Basics
ONLINE CLASS	Marketplace Basics
ONLINE CLASS	Cultural Competency

CURRICULUM

PY2023 Agent/Broker Marketplace Training - Individual Marketplace

[Open Curriculum](#)

# Step 5: Complete Marketplace Training on the MLMS or through an HHS-approved Vendor via the CMS Enterprise Portal (Continued)



- » A page opens with the list of course modules. Click “View Details” to open the first module.

The screenshot displays the 'Health Insurance Marketplace' training interface. On the left, a sidebar shows the 'CURRICULUM PROGRESS' with a circular progress indicator at 0%. Below this, a list of training modules is shown: 'PY2023 Agent/Broker Marketplace Training - Individual Marketplace' (selected), 'PY2023 MARKETPLACE BASICS', 'PY2023 INDIVIDUAL MARKETPLACE', and 'PY2023 PRIVACY AND SECURITY'. The main content area, titled 'PY2023 Agent/Broker Marketplace Training - Individual Marketplace', lists four modules, each with a 'View Details' button:

- PY2023 Marketplace Basics**: Completed : 0 Min Required : 4 Total Items : 4
- PY2023 Individual Marketplace**: Completed : 0 Min Required : 4 Total Items : 4
- PY2023 Privacy and Security**: Completed : 0 Min Required : 4 Total Items : 4
- PY2023 Individual Marketplace General Agreement**: Completed : 0 Min Required : 1 Total Items : 1

# Step 5: Complete Marketplace Training on the MLMS or through an HHS-approved Vendor via the CMS Enterprise Portal (Continued)



- » Start the curriculum's courses by clicking the "Launch" button next to each course.
- » Note some modules have prerequisites, so there may not be a "Launch" button next to each module.

The screenshot displays the 'Health Insurance Marketplace' training interface. On the left, a sidebar shows 'CURRICULUM PROGRESS' with a circular progress indicator at 0%. Below this, a list of training modules is shown: 'PY2023 Agent/Broker Marketplace Training - Individual Marketplace' (selected), 'PY2023 MARKETPLACE BASICS', 'PY2023 INDIVIDUAL MARKETPLACE', and 'PY2023 PRIVACY AND SECURITY'. The main content area is titled 'PY2023 Agent/Broker Marketplace Training - Individual Marketplace' and includes an 'Options' dropdown. It lists three courses: 'Affordable Care Acts Basics' (Status: Registered, Due: No Due Date, Load 3.1, with a 'Launch' button), 'Marketplace Basics' (Status: Pending Prior Training, Due: No Due Date, Load 3), and 'Cultural Competency' (Status: Pending Prior Training, Due: No Due Date, Load 3.1). A fourth course, 'Marketplace Basics Exam', is partially visible at the bottom.

# Step 5: 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 CEUs, there will be an approved vendor offering Marketplace training for Plan Year 2023.
- » 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.
  - There is no fee for HHS-approved vendor CEUs.
  - For more information on individual state CEU requirements, check with the respective state Department of Insurance.

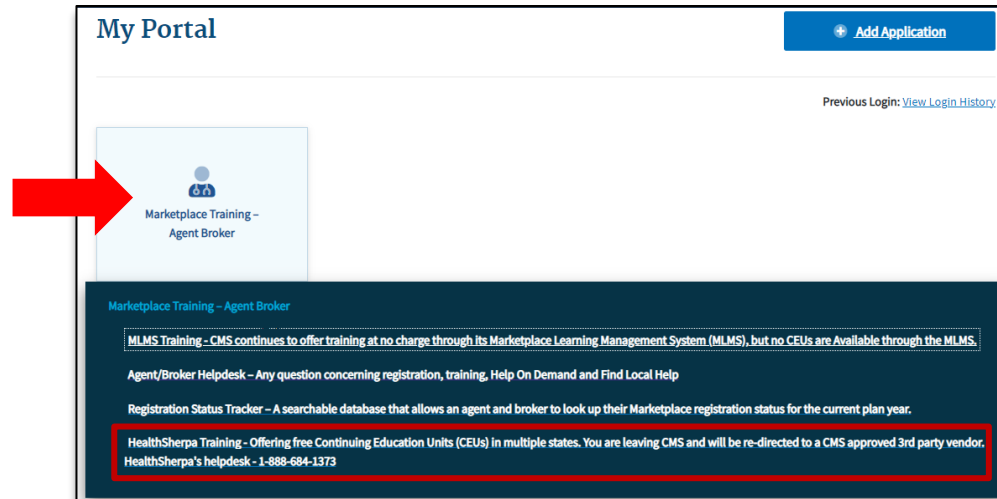




# Step 5: Complete Marketplace Training on the MLMS or through an HHS-approved Vendor via the CMS Enterprise Portal (Continued)



- » 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.



# Step 5: 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.

A screenshot of the CMS.gov Enterprise Portal login interface. The page has a dark blue header with the text 'CMS.gov | Enterprise Portal'. Below the header are two white input fields for 'UserID' and 'Password'. Underneath these fields is a checkbox labeled 'Agree to our Terms & Conditions' which is checked. A red arrow points to a green 'Login' button. Below the login button is a link that says 'Forgot your User ID or your Password?'. At the bottom of the form is a blue button labeled 'New User Registration'.

# Step 6: Read and Accept the Applicable Marketplace Agreement(s) on the MLMS

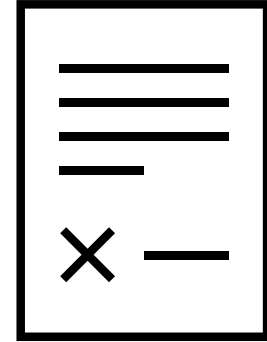


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5. Complete Marketplace Training on the MLMS or through an HHS-approved Vendor via the CMS Enterprise Portal.
- 6. Read and Accept the Applicable Marketplace Agreement(s) on the MLMS.**
7. Confirm Completion of all Registration Steps by logging back into the CMS Enterprise Portal and printing the Completion Certificate.

# Step 6: 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



# Step 6: Read and Accept the Applicable Marketplace Agreement(s) on the MLMS (Continued)



- » An agent or broker must request the FFM Agent and Broker Training Access role and complete/update their MLMS profile information, complete identity proofing\*, and complete the required training and exams before they can sign the Agreement(s).
- » Once an agent or broker has completed the training (which is required for the Individual Marketplace and optional for SHOP), they will need to sign the Agreement(s).
- » After launching the appropriate Agreement module, review the Agreement language and click "I Agree" at the end of the Agreement to provide an electronic signature and review and accept the terms of the Marketplace Agreement.

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

\*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 7: Confirm Completion of all Registration Steps by logging back into the CMS Enterprise Portal and printing the Completion Certificate

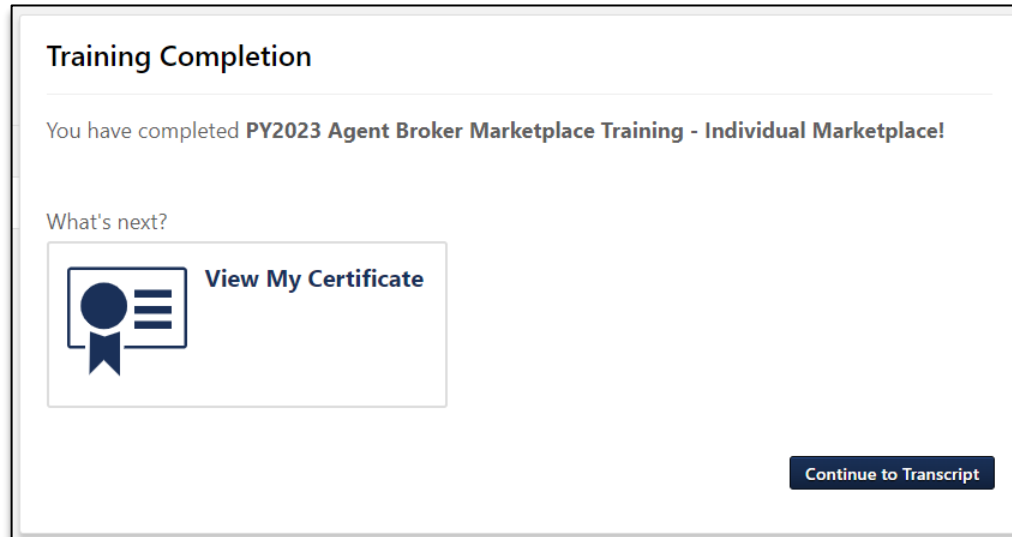


1. Create a CMS Enterprise Portal Account.
2. Request the Agent and Broker Training Access Role.
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4. Complete the Agent and Broker Profile on the MLMS via the CMS Enterprise Portal.
5. Complete Marketplace Training on the MLMS or through an HHS-approved Vendor via the CMS Enterprise Portal.
6. Read and Accept the Applicable Marketplace Agreement(s) on the MLMS.
- 7. Confirm Completion of all Registration Steps by logging back into the CMS Enterprise Portal and printing the Completion Certificate.**

## Step 7: Confirm Completion of all Registration Steps by logging back into 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 7: Confirm Completion of all Registration Steps by logging back into the CMS Enterprise Portal and printing the Completion Certificate (Continued)



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



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 7: Confirm Completion of all Registration Steps by logging back into 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, go to the [Marketplace Registration Tracker](#) to check Marketplace registration status.
  - Enter an NPN and ZIP code.
  - Information is updated daily by 5:00 PM ET.
- » If additional assistance is needed, send an email to: [FFMProducer-AssisterHelpDesk@cms.hhs.gov](mailto: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.

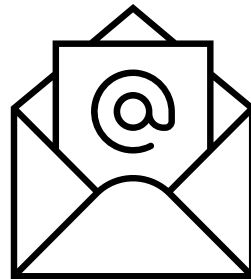
# Support Available for Complex Consumer Cases

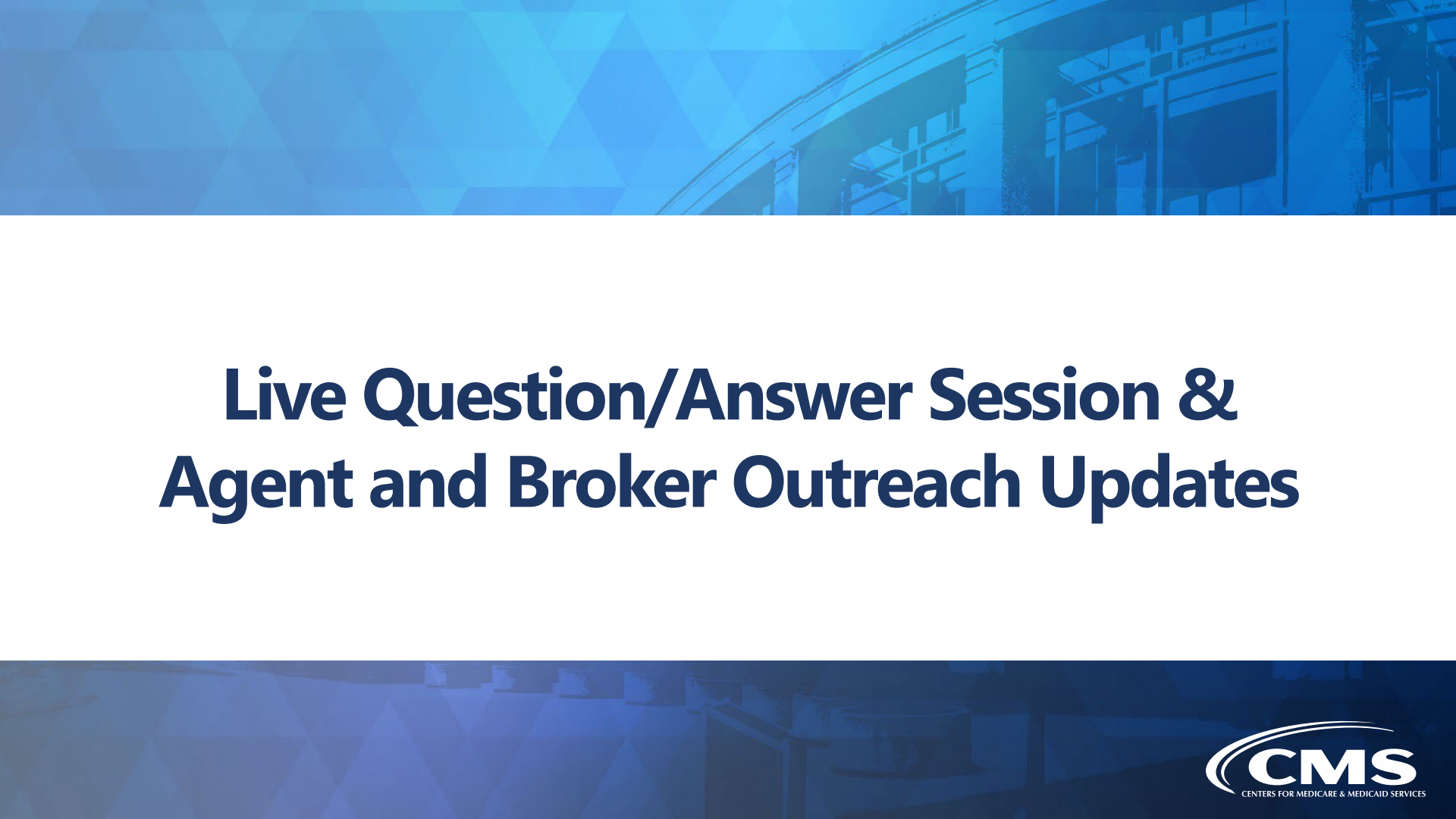


- » If an agent or broker is unsuccessful in resolving the case with the Call Center or EDE partner and still require assistance, contact the FFM Agent and Broker Email Help Desk (FFMProducer-AssisterHelpDesk@cms.hhs.gov) and provide the following information:
  - Full name, email address, and phone 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 or 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 dynamic list of resources that provide helpful information, including guidance, regulations, newsletters, previous webinar slides, quick reference guides, and more.

- » Visit <https://www.cms.gov/CCIIO/Programs-and-Initiatives/Health-Insurance-Marketplaces/General-Resources> and search by topic or keyword to find resources that are relevant to agent and broker questions.



- » 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>.



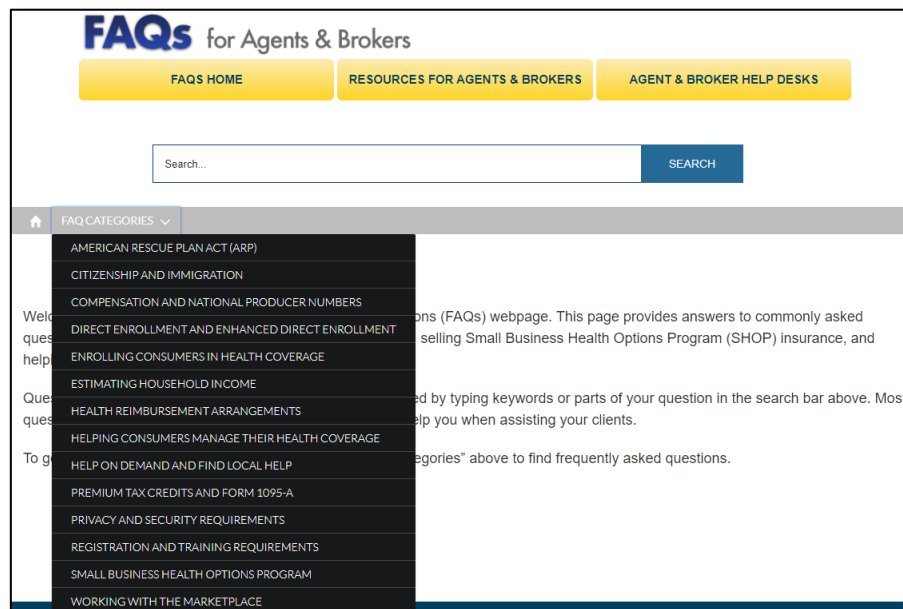


# Frequently Asked Questions Database



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 in the Agent and Broker Resources webpage.



# Upcoming Webinars & Office Hours



## Upcoming Webinar Topics

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](mailto: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"> <li>General enrollment and compensation questions</li> <li>Manual identity proofing/Experian issues</li> <li>Escalated registration and training questions (not related to a specific training platform)</li> <li>Agent and Broker Registration Completion List issues</li> <li>Find Local Help listing issues</li> <li>Help On Demand participation instructions or questions</li> <li>Report concerns that a consumer or another agent and broker has engaged in fraud or abusive conduct</li> </ul>	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"> <li>CMS Enterprise Portal password resets and account lockouts</li> <li>Other CMS Enterprise Portal account issues or error messages</li> <li>General registration and training questions (not related to a specific training platform)</li> <li>Login issues on the Classic Direct Enrollment agent and broker landing page</li> <li>Technical or system-specific issues related to the Marketplace Learning Management System (MLMS)</li> <li>User-specific questions about maneuvering in the MLMS site, or accessing training and exams</li> </ul>	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	<p>Specific consumer application questions related to:</p> <ul style="list-style-type: none"> <li>Password reset for a consumer HealthCare.gov account,</li> <li>Special enrollment period not available on the consumer application, or</li> <li>Consumer specific eligibility and enrollment questions</li> </ul>	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"><li>• Technical or system-specific issues related to the MLMS</li><li>• User-specific questions about maneuvering in the MLMS site, or accessing training and exams</li></ul>	Monday-Friday 9:00 AM-5:30 PM ET
SHOP Call Center	800-706-7893	<ul style="list-style-type: none"><li>• Inquiries related to SHOP eligibility determinations on HealthCare.gov</li><li>• Contact the insurance company for most questions about SHOP plans, such as applications, enrollment, renewal, or changing or updating coverage.</li></ul>	Monday-Sunday 24 hours/day
Marketplace Appeals Center	1-855-231-1751 TTY users 1-855-739-2231	<ul style="list-style-type: none"><li>• Status of a Marketplace eligibility appeal</li><li>• How to appoint an Authorized Representative to request Marketplace eligibility appeal on a consumer's behalf</li></ul>	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 Marketplace; provides the latest news and resources, including newsletters, webinars, fact sheets, videos, and tip sheets	<a href="http://go.cms.gov/CCIOAB">http://go.cms.gov/CCIOAB</a>
HealthCare.gov	Official site of the Marketplace; used for researching health coverage choices, eligibility, and enrollment	<a href="https://www.healthcare.gov/">https://www.healthcare.gov/</a>
Marketplace Information	Official Marketplace information source for assisters and outreach partners about Marketplace eligibility, financial assistance, enrollment, and more	<a href="https://marketplace.cms.gov">https://marketplace.cms.gov</a>
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	<a href="https://localhelp.healthcare.gov/">https://localhelp.healthcare.gov/</a>
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	<a href="https://www.cms.gov/CCIIO/Programs-and-Initiatives/Health-Insurance-Marketplaces/Downloads/Help-On-Demand.pdf">https://www.cms.gov/CCIIO/Programs-and-Initiatives/Health-Insurance-Marketplaces/Downloads/Help-On-Demand.pdf</a>
Agent and Broker NPN Search Tool	Enables users to search and find the correct NPN to enter in the MLMS profile and on Marketplace applications	<a href="http://www.nipr.com/PacNpnSearch.htm">www.nipr.com/PacNpnSearch.htm</a>

# 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	<a href="https://data.healthcare.gov/AB-NIPR-Health-Line-Of-Authority">https://data.healthcare.gov/AB-NIPR-Health-Line-Of-Authority</a>
National Insurance Producer Registry	Provides licensure and compliance information for agents and brokers	<a href="https://nipr.com/licensing-center/add-a-line-of-authority">https://nipr.com/licensing-center/add-a-line-of-authority</a>
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	<a href="https://portal.cms.gov">https://portal.cms.gov</a>
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	<a href="https://data.healthcare.gov/issuer-partner-lookup">https://data.healthcare.gov/issuer-partner-lookup</a>
Assisting Clients with Marketplace Eligibility Appeals	Reviews the Marketplace eligibility appeal process and describes consumers' rights to appeal a Marketplace eligibility determination	<a href="http://cbt.regtap.info/cbt/regtap/AB_MarketplaceEligibilityAppeals_CBT_5CR_061119/story_html5.html">http://cbt.regtap.info/cbt/regtap/AB_MarketplaceEligibilityAppeals_CBT_5CR_061119/story_html5.html</a>
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	<a href="https://www.agentbrokerfaq.cms.gov/s/">https://www.agentbrokerfaq.cms.gov/s/</a>

# 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	<a href="https://data.healthcare.gov/ffm_ab_registration_lists">https://data.healthcare.gov/ffm_ab_registration_lists</a>
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	<a href="https://data.healthcare.gov/ab-registration-tracker/">https://data.healthcare.gov/ab-registration-tracker/</a>
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 agents and brokers navigate the Marketplace.	<a href="https://bit.ly/3hXLyru">https://bit.ly/3hXLyru</a>



# Acronym Definitions



Acronym	Definition
CCIO	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!