




New Agents' and Brokers' Guide to Plan Year 2020 Marketplace Registration and Training

This resource is an overview of the plan year 2020 Health Insurance Marketplace registration and training process for “new” agents and brokers who did not complete plan year 2019 registration and training and are required to take the full Individual Marketplace training for plan year 2020. Follow these steps:

 **Note:** If you already have a CMS Enterprise Portal account, you should not create a new one. Click [here](#) for more information.

1

Create an Account on the Centers for Medicare & Medicaid Services (CMS) Enterprise Portal

- Navigate to the [CMS Enterprise Portal](#) and select **New User Registration**.
- Under the **Choose Your Application** drop-down menu, select the **MLMS: Marketplace Learning Management System** option.
- Complete the steps as prompted to create an account.
- You will receive an email at the address you listed in your account, notifying you of your successful account creation.

2


Request the Federally-facilitated Marketplace (FFM) Agent Broker Role

- Log in to the [CMS Enterprise Portal](#) and on the **My Portal** page, select the **Request/Add Apps** button to access the Application Catalog
- Enter “F” or “FE” into the **Access Catalog** search bar and select the **Request Access** button on the **FFM/Training – Agents/Brokers/Assisters** tile.
- On the following webpage, select **FFM Agent Broker** from the **Role** drop-down menu and select the **Submit** button.

3

Complete Remote Identity Proofing

- After requesting the **FFM Agent Broker** role, you will be prompted to complete identity proofing.
- Read the instructions and then select **Next** to begin the identity verification process.
- Enter and confirm your information and answer identity verification questions. You will then be asked to log out and log back in to the [CMS Enterprise Portal](#).
- If your information cannot be verified remotely (i.e., electronically), the CMS Enterprise Portal will provide you with a phone number and code to confirm your identity directly with Experian, which is CMS’ identity proofing vendor.

 **Note:** If you have completed identity proofing in the past, you will not need to complete it again.



4

Complete Your Marketplace Learning Management System (MLMS) Profile

- Log in to the [CMS Enterprise Portal](#) and select the **Complete Agent Broker Training** link.
- Select the **Access Training** link next to the **MLMS Training** option, which is the second option listed.
- Select one of four user roles: 1) **Only an Individual Marketplace Agent Broker**; 2) **Only a Small Business Health Options Program (SHOP) Marketplace Agent Broker**; 3) **Both an Individual and SHOP Marketplace Agent Broker**; or 4) **Not an Agent Broker**.
- Enter all applicable information in your MLMS profile. The profile fields will be customized based on the user role you selected.
- The information you use to complete your MLMS profile will be used to populate [Find Local Help](#) at HealthCare.gov and Help On Demand so consumers, small employers, and small business employees can find you for assistance.
- Select **Save/Update**, then **Next** to complete your profile.



Note: If applicable to your use role (i.e., all roles noted above, except the **Not an Agent Broker** option), make sure that you enter your National Producer Number (NPN) correctly. Entering an inaccurate NPN may result in denial of compensation or credit by issuers for assisting consumers with enrolling in a Marketplace plan.

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Complete Training through the MLMS or a CMS-Approved Vendor

- On the [CMS Enterprise Portal](#), select the **Complete Agent Broker Training** link.
- Review the MLMS and the CMS-approved vendor training options.
 - America's Health Insurance Plans (AHIP) is approved as a vendor to offer Individual Marketplace training for plan year 2020.
 - If you choose to complete training through AHIP, CMS recommends you do so prior to completing your MLMS profile.
- Select the **Access Training** link beside the training option you plan to complete and follow the prompts to enroll in and complete the training curriculum of your choice – either for the Individual Marketplace, SHOP, or both.



Note: If you complete training with AHIP, you must return to the MLMS to execute the applicable Agreements. This step is **required** to complete your Marketplace registration for plan year 2020.



Note: SHOP training is available only on the MLMS. AHIP does not offer the SHOP curriculum as part of its plan year 2020 Marketplace training. If you complete Individual Marketplace training through AHIP and are interested in the SHOP, you must return to the MLMS to complete SHOP training.

6

Execute the Applicable Agreement(s) on the MLMS

- Once you have updated your MLMS profile and completed training through either the MLMS or AHIP, you must launch, read, and select the **I Agree** button for all applicable Agreement(s).



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Confirm Registration Status and Print Certificate

- After executing the Agreement(s), you will be redirected to the Agent Broker Registration Status page on the CMS Enterprise Portal. Review this page to confirm you have completed all registration steps.
 - To ensure the system completes the update of your records, wait for the progress bar to complete to 100 percent before logging out of the system.
- If you have completed all steps, select the **Print Certificate(s)** button on the Agent Broker Registration Status page.
- Confirm that your information appears on the [Agent and Broker FFM Registration Completion List \(RCL\)](#).
 - Your information may take one to two business days to appear on the RCL.
 - It may take up to three business days to appear on Find Local Help.
 - If your NPN does not appear on the RCL for plan year 2020, send an email to: FFMProducer-AssisterHelpDesk@cms.hhs.gov for assistance.

Looking for additional guidance? [Contact one of our Agent and Broker Help Desks](#) for assistance.