Federal CMS (Exchange) Agent/Broker Training for the Marketplace.

A guide on how to register for the CMS required training and exams for selling in Individual and SHOP Marketplace.
Table of Content.

This PowerPoint will help you register for the required CMS training and testing to sell in the Public Individual or Shop Exchange in Ohio, the Ohio training is not yet been announced.

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- **How to register for CMS.gov Enterprise Portal**
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- **Complete!**

- **Helpful Links**

- **End Slideshow**
How to register for Health Insurance Marketplace

In the next slide you will see where to start with this training.

- First you will need to go to: Health Insurance Marketplace

- Second, click on the: Need an account? Create Account
  (You can just click the link in this PP)

- You will need to included information such as: First name, Last name, email address, work phone, state, zip code, user type/user role, NPN#, and Organization.
Welcome to the training site for Health Insurance Marketplace in-person consumer assisters! Consumers are counting on you to help them understand their options, apply for coverage, and get enrolled beginning October 1, 2013.

Enter your login information below.

Need an account? Create Account

**Login ID**

Forgot your ID?

**Password**

Forgot your password?

Log In

Recent Announcements

***Auto-Assignment of Required Curriculum***

Once your registration is complete, the system will auto-assign your required curriculum within 15 m More

Welcome!

Welcome to the training site for Health Insurance Marketplace in-person consumer assisters! Consumer More
Setting up your account

Let’s start this out with setting up your username and password

- The username and password MUST contain at least 8 characters in length, 1 special character, 1 uppercase character, and 1 number. (Example: John#1234)

- FYI - After completing this training and testing you will also have to register at a second site (CMS Enterprise Portal) for submitting and tracking applications directly through the Ohio/Federal exchange. You may not be able to use the same username/password for both, other website will not allow special characters to be used so prepare in advance for this. Info about this later in this presentation.
Setting up your account cont.

Start to fill out the rest of your personal information until you get to the User type/User Role.

- Make sure you select the Agent/Broker/Web-Broker – Individual Market and SHOP if you want to do both. (See image for reference)
Setting up your account cont.

- Next you will need to enter in your NPN#.
- You will then be asked to select an organization type and this part is a little misleading to say the least. The drop down menu next to Organization Type seems to do close to nothing. You have to go just under the drop down menu and click the select link.
This will then open up a page overlay for you to search and find the organization that pertains to you. You will NEED to type in “Marketplace” and hit search. (Refer to image on the next page for visual reference.)

Once you have selected the radial button for Marketplace then hit save on the page overlay.

The other four options under the organization section is optional to the agent. (Mostly preferences and accessibility)
Organization Type Image

Select Organizations

Perform a search to find organizations. Select one or more organizations, and save.

Find Organization:
Marketplace
Search
Any words

<table>
<thead>
<tr>
<th>Organization(s)</th>
<th>Path</th>
</tr>
</thead>
<tbody>
<tr>
<td>Marketplace</td>
<td></td>
</tr>
</tbody>
</table>
The last step for setting up your account is to click the Create button at the bottom right corner.
Finding the course material

- Now you should be able to log in and access the content inside of Health Insurance Marketplace.
  - The setup of content is a little bit confusing so I have some images to help you find the related course material.

- On the right side you will see My Curriculums and a Search underneath that. (The SHOP curriculum and exam are NOT required, they are at the bottom of the page under Optional) You may want to do at least the curriculum portion to be able to save the information there.
Finding the course material  
( continued )

- Under the Search field you should see: Agent/Broker – Individual & SHOP Marketplace (1), click that link.  
  (See the image on the next slide)

- You will have to screen print every page if you want the material, it is not a downloadable file. Also the sample questions can be printed for reference in the exams. The shop portion has some screens that you may not be able to print so there is an attachment with those pages included.

- There is NO charge or CE credits for the training.
In the security section, that ask you to refer to the requirements in a certain document, the reference being: http://www.cms.gov/CCIIO/Resources/Regulations-and-Guidance/Downloads/Catalog-of-MinAcceptable-Risk-Controls-for-Exchanges-ERA-Supp-v-1-0-080120

12-a.pdf. When you go to look at this document, it is 199 pages long. This is really optional to print, you can keep as a file to refer too if need be.
Everyone should be aware that it appeared that the exam required you to answer only ONE answer per question, when it looked like there were several correct answers. It turns out that you should be able to select ALL answers that appear to be correct, rather than just one (like some of the questions that were posed in tests after the chapters.)

There is now a help line phone number for registration problems that was not available till 8/21/13

1-800-706-7893
Finding the course material cont.
Finding the course material cont.

Once you are in there you will see the following information. Just click on the title (Individual Marketplace and SHOP Marketplace Curriculum) and you will be directed to the next step.

Individual Marketplace and SHOP Marketplace Curriculum

Description
This training curriculum will educate agents and brokers who wish to participate in both the Federally-facilitated Marketplaces where individuals and families can shop for private insurance plans beginning October 1, 2013 and the Federally-facilitated Small Business Health Options Program (SHOP) Marketplaces that will be available in each state starting in 2014.

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

Agents and brokers are strongly encouraged, although not required, to complete the SHOP Marketplace course and exam prior to operating in the Federally-facilitated SHOP Marketplaces. The SHOP Marketplace Agreement is the only required part of the SHOP Marketplace training curriculum. Agents/brokers who wish to operate in the Federally-facilitated SHOP Marketplace must read and accept the SHOP Marketplace agreement.
# Course material overview

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

<table>
<thead>
<tr>
<th>Order</th>
<th>Title</th>
<th>Type</th>
<th>Status</th>
<th>Equivalent Content Completed</th>
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</thead>
<tbody>
<tr>
<td>1</td>
<td>Affordable Care Act and Marketplace Basics</td>
<td></td>
<td>Not Enrolled</td>
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</tr>
<tr>
<td>2</td>
<td>Affordable Care Act and Marketplace Basics Exam</td>
<td></td>
<td>Not Enrolled</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Individual Marketplace Course</td>
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<td>Not Enrolled</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Individual Marketplace Exam</td>
<td></td>
<td>Not Enrolled</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Individual Marketplace Agreements</td>
<td></td>
<td>Not Enrolled</td>
<td></td>
</tr>
<tr>
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<td>SHOP Marketplace Agreement</td>
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Below are required activities for this curriculum. They can be completed in any order.

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## Optional
Below are optional activities for this curriculum. They can be completed in any order. These optional activities do not need to be completed in order to earn completion status for the curriculum.

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Course material overview cont.

- This material is required for the certification.

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- This material is optional but contains good information.

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How to register for CMS.gov

Enterprise Portal

First you will need to go to CMS Enterprise Portal. The login/registration links are on the right side just under the header.

Keep in mind that on this website you can not use special characters for the password/username.
Starting the sign up process

- Now you should click the **New User Registration** and you will be directed to this page.
Starting the sign up process cont.

- Check the I agree to the terms and conditions box and then click next.
- You will be directed to a slightly more advanced sign up form. Fill in your information such as first name, last name, email, social, birth date, home address, city, state, zip code, and primary phone number. (See the next slide for a visual reference)

- You should register as soon as you can to CMS because you will be waiting on their time for them to send you a verification code, this may not come till September per CMS.
Sign up form
CMS confirmation screen

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. **EDM** - Presently, only FFPHONE applications are provisioned using EDM. If you need access to applications integrated with EDM please click “Request Access Now” found on the right-hand side of the 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 (FFPHONE applications only).

Contact Help Desk

- **CMS Help Desk**: Contact the CMS Enterprise Portal at 1-800-858-0133 (select option 1). If you have any questions about using the CMS Portal features, TTY users should call 1-800-877-8339.
- **IACS Help Desk**: Contact the appropriate IACS Help Desk based on the application you are trying to access.
- **FFPHONE Help Desk**: Contact the Exchange Operations Support Center (EOCS) at CMS/EOCS Home Page or 1-855-CMS-15/5.
What’s inside your portal

The top image is the home page for your portal. The bottom one is when you click Request New Application.
You will not be able to do anything in your CMS enterprise portal until they give you the verification.

The bottom image shows the screen when you click on View and Manage My Access.
Helpful Links

- **Health Insurance Marketplace** – Website with lessons/exams

- **CMS Enterprise Portal** – Website to register for after completing all of the training.

- **CMS Health Insurance Marketplace** – Helpful tips and information.

- **HealthCare.gov** – Good source of information and resources.
Helpful Links cont.

- **CMS.gov Resources** – More information about health insurance marketplace.

- Health Insurance Marketplace and CMS.gov Enterprise Portal urls:
  - CMS EP - https://portal.cms.gov/wps/portal/unauthportal/home/!ut/p/b1/04_SjzQ0MDKxtLQwszDQj9CPykssy0xPLMnMz0vMAfGjzOLdDSDAyN_QzMjA08vF3MMryNHYwN8MqCASqMAAB3A0IKTfzyM_N1U_NyrHAgB9GR6k/dl4/d5/L2dBISEvZ0FBIS9nQSEh/