

Plan Year 2024 Open Enrollment Resources

Centers for Medicare & Medicaid Services (CMS)

Center for Consumer Information & Insurance Oversight (CCIIO)

November 16, 2023

Agent and Broker Resources Webpage

- » Agents and brokers should bookmark the [Agent and Broker Resources website](#), which acts as the primary outlet for agents and brokers to find information about working in the Marketplace.
- » The website also includes a link to the [General Resources](#) page, a **searchable list of resources** that provide helpful information, including guidance, regulations, previous webinar slides, quick reference guides, and more.
 - To filter for Spanish resources, enter the keyword "**Spanish**" into the search bar on the General Resources webpage.

Resources for Agents and Brokers in the Health Insurance Marketplaces

Welcome

Welcome to the Agents and Brokers Resources webpage. This page is the primary outlet for agents and brokers to receive information from CMS about working in the Health Insurance Marketplace and the Small Business Health Options Program (SHOP).

Latest News

Plan Year 2024 Registration and Training is Live for New and Returning and Brokers!

Plan Year 2024 Marketplace registration and training is now available for new and returning agents and brokers on the Marketplace Learning Management System (MLMS).

For more information on Plan Year 2024 registration and training, visit the [Registration and Training](#) page.

Medicaid Unwinding

CMS posted the anticipated state timelines for initiating Medicaid unwinding-related renewals as of June 29, 2023. This chart details the expected first month for each state/territory's Medicaid unwinding-related renewals, as well as the anticipated effective date for the first procedural terminations. You can find the chart along with other Medicaid unwinding resources on [Medicaid.gov/unwinding](https://www.medicaid.gov/unwinding).

Thank you for Attending the 2023 CMS Agent and Broker Summit

Thank you to everyone who attended this year's 2023 CMS Agent and Broker Summit! Whether you attended in-person or virtually, you made meaningful contributions to the discussions and helped to make this an incredibly successful event. **The presentation slides from each Summit session are available for download below.**

- [Welcome and Overview \(PDF\)](#)
- [Navigating the Medicaid Unwinding Period \(PDF\)](#)
- [Making Enrollment Decisions \(PDF\)](#)
- [Expanding Your Reach \(PDF\)](#)
- [Eligibility Workshop \(PDF\)](#)
- [Data Matching Issues Workshop \(PDF\)](#)
- [Marketplace Compliance and Agent/Broker Regulations \(PDF\)](#)
- [Download all presentations \(ZIP\)](#)

Marketplace Registration and Training for Plan Year 2024 Resources



- » For more information on Marketplace registration and training, view the following resources:
 - [Plan Year 2024 Health Insurance Marketplace Registration and Training for New Agents and Brokers webinar deck](#)
 - [Plan Year 2024 Health Insurance Marketplace Registration and Training for Returning Agents and Brokers webinar deck](#)
 - [New Agents' and Brokers' Guide to Plan Year 2024 Marketplace Registration and Training](#)
 - [Returning Agents' and Brokers' Guide to Plan Year 2024 Marketplace Registration and Training](#)



DID YOU KNOW?

Almost 80,000 agents and brokers registered with the Marketplace for PY2023, the most since PY2016.

2023 Agent and Broker Summit Resources



- » The video recordings, and corresponding transcripts, of the **2023 Agent and Broker Summit** presentations are now available for viewing on [REGTAP](#).

Additional Resources: 2023 Agent and Broker Summit

Welcome to the 2023 Agent and Broker Summit: [Video](#) and [Transcript](#)

Agent and Broker Panel Discussion – Connecting Consumers to Coverage: Increasing Access to Health Insurance Coverage and Advancing Health Equity: [Video](#) and [Transcript](#)

CMS SME Panel Discussion: Ask CMS: Understanding Best Practices and Challenges Faced by Agents and Brokers in the Marketplace: [Video](#) and [Transcript](#)

Expanding Your Reach: Utilizing Find Local Help, Help On Demand, and Agent & Broker Recognition Programs to Increase Access to Coverage: [Video](#) and [Transcript](#)

Data Matching Issues Workshop: Minimizing and Resolving Enrollment Blockers: [Video](#) and [Transcript](#)

Navigating the Medicaid Unwinding Period: Ensuring Consumers Stay Covered: [Video](#) and [Transcript](#)

Making Enrollment Decisions: Best Practices for Maximizing Consumer Coverage: [Video](#) and [Transcript](#)

Marketplace Compliance and Agent/Broker Regulations: Understanding Key CMS Rules and Regulations to Maintain Marketplace Compliance: [Video](#) and [Transcript](#)

Eligibility Workshop: Navigating Complex Eligibility and Enrollment Scenarios: [Video](#) and [Transcript](#)

Transitions in Coverage Survey

Transitions in Coverage

- » The continuous enrollment condition ended on March 31, 2023, and states are now required to resume regular eligibility and enrollment operations for Medicaid and the Children's Health Insurance Program (CHIP), including renewals and coverage terminations. As an agent or broker, you play an important role in connecting consumers with Marketplace health insurance coverage during these transitions.
- » CMS values your contributions to ensuring consumers have access to coverage during this transition period, and we want to learn from your experiences. **If you have feedback for CMS regarding Medicaid and Marketplace transitions, please complete the survey at the link located [here](#) and in this webinar chat.** This information will help CMS understand how to best support agents and brokers during this period.
- » For more information on transitions in coverage, view [this toolkit](#) and [Medicaid.gov](#).



Agent and Broker Video Learning Center



- » The **Agent and Broker Video Learning Center** on YouTube 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>.
- » View the new [Guide to 2024 Marketplace Updates video](#) to learn more about policy updates that agents and brokers should keep in mind while assisting consumers during the PY 2024 Open Enrollment Period (OEP).

Search

Video Learning Center 20:04

17 Streamlined Marketplace Application Drilldown – Race and Ethnicity Questions
CMSHHSgov • 5.5K views • 1 year ago
5:25

18 Streamlined Marketplace Application Drilldown – Estimating Income
CMSHHSgov • 2K views • 1 year ago
4:54

19 A New Agent and Broker Checklist for Success
CMSHHSgov • 12K views • 1 year ago
16:55

20 Streamlined Marketplace Application Walkthrough – Household Not Seeking Financial Assistance
CMSHHSgov • 2.2K views • 1 year ago
13:19

21 Streamlined Marketplace Application Walkthrough – Loss of Health Coverage SEP
CMSHHSgov • 2.1K views • 1 year ago
6:54

22 Welcome to the Marketplace
CMSHHSgov • 4.3K views • 8 months ago
2:12

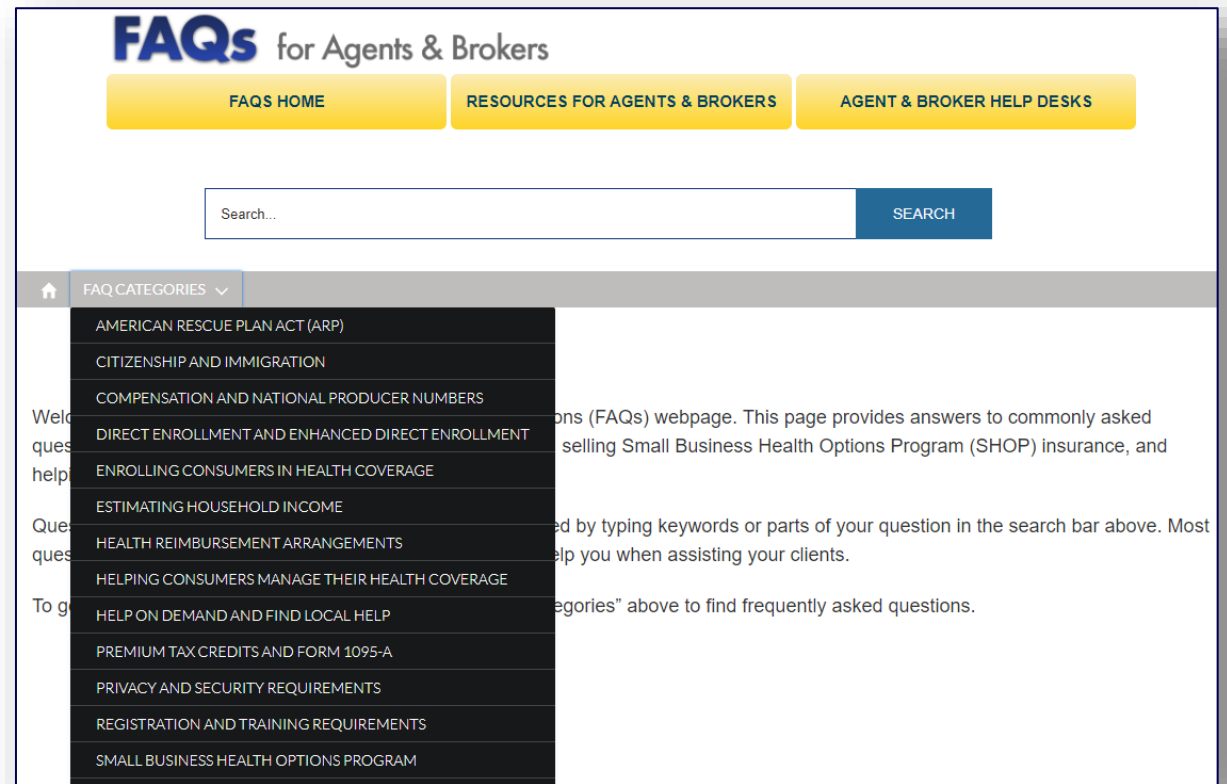
23 Guide to 2023 Marketplace Updates
CMSHHSgov • 5.8K views • 7 months ago
4:02

24 What You Need to Know About Medicaid and the Unwinding Period
CMSHHSgov • 5.5K views • 3 weeks ago
6:01

Frequently Asked Questions Database



- » **The Agent and Broker Frequently Asked Questions (FAQs) website** is a self-service resource available online and is linked in the Agent and Broker Resources webpage.
- » Visit <https://www.agentbrokerfaq.cms.gov/s/> to search over 160+ FAQs with helpful resources linked in each answer.
- » FAQ categories include topics such as:
 - Working with the Marketplace
 - Enrolling Consumers in Health Coverage
 - Registration and Training Requirements
 - Transitions in Coverage
 - Privacy and Security Requirements
 - And more!



Upcoming Office Hours



Register for upcoming office hours by visiting <https://www.regtap.info/> and following the instructions below. Once an agent or broker registers for office hours on REGTAP, they are registered for the entire office hours series. Registration for webinars will be available as the date approaches.

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

Office Hour Dates	Time
Thursday, December 7, 2023	1:30 – 2:30 PM EST
Thursday, January 4, 2024	1:30 – 2:30 PM EST

Agent and Broker Marketplace Help Desks and Call Centers



Name	Phone # and/or Email Address	Types of Inquiries Handled	Hours (Closed Holidays)
Marketplace Service Desk	855-CMS-1515 855-267-1515 CMS_FEPS@cms.hhs.gov	<ul style="list-style-type: none"> • CMS Enterprise Portal password resets and account lockouts • Other CMS Enterprise Portal account issues or error messages • General registration and training questions (not related to a specific training platform) • Login issues on the Classic Direct Enrollment agent and broker landing page • Technical or system-specific issues related to the Marketplace Learning Management System (MLMS) • User-specific questions about maneuvering in the MLMS site, or accessing training and exams 	Monday-Friday 8:00 AM-8:00 PM ET
Agent and Broker Email Help Desk	FFMProducer-AssisterHelpDesk@cms.hhs.gov	<ul style="list-style-type: none"> • General enrollment and compensation questions • Manual identity proofing/Experian issues • Escalated registration and training questions (not related to a specific training platform) • Agent and Broker Registration Completion List issues • Find Local Help listing issues • Help On Demand participation instructions or questions • Report concerns that a consumer or another agent and broker has engaged in fraud or abusive conduct 	Monday-Friday 8:00 AM-6:00 PM ET
Agent and Broker Training and Registration Email Help Desk	MLMSHelpDesk@cms.hhs.gov	<ul style="list-style-type: none"> • Technical or system-specific issues related to the MLMS • User-specific questions about maneuvering in the MLMS site, or accessing training and exams 	Monday-Friday 9:00 AM-5:30 PM ET

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



Name	Phone # and/or Email Address	Types of Inquiries Handled	Hours (Closed Holidays)
Marketplace Call Center Agent and Broker Partner Line	855-788-6275 Note: Enter an NPN to access this line. TTY users 1-855-889-4325	Specific consumer application questions related to: <ul style="list-style-type: none"> • Password reset for a consumer HealthCare.gov account, • Special enrollment period not available on the consumer application, or • Consumer specific eligibility and enrollment questions 	Monday- Sunday 24 hours/day
SHOP Call Center	800-706-7893	<ul style="list-style-type: none"> • Inquiries related to SHOP eligibility determinations on HealthCare.gov • Contact the insurance company for most questions about SHOP plans, such as applications, enrollment, renewal, or changing or updating coverage. 	Monday-Sunday 24 hours/day
Marketplace Appeals Center	1-855-231-1751 TTY users 1-855-739-2231	<ul style="list-style-type: none"> • Status of a Marketplace eligibility appeal • How to appoint an Authorized Representative to request Marketplace eligibility appeal on a consumer's behalf 	Monday-Friday 7:00 AM-8:30 PM ET

Agent and Broker Resource Links



Resource	Description	Link
Agents and Brokers Resources Webpage	Primary outlet for agents and brokers to receive information about working in the Marketplace; provides the latest news and resources, including newsletters, webinars, fact sheets, videos, and tip sheets	http://go.cms.gov/CCIOAB
HealthCare.gov	Official site of the Marketplace; used for researching health coverage choices, eligibility, and enrollment	https://www.healthcare.gov/
CMS Enterprise Portal	Allows agents and brokers to securely complete identity proofing and access the MLMS to complete annual, required Marketplace agent and broker training and registration	https://portal.cms.gov
Agent and Broker FFM Registration Completion List (RCL)	Public list of agents and brokers who have completed Marketplace registration; used by issuers to verify agents' and brokers' eligibility for compensation for assisting with Marketplace consumer enrollments	https://data.healthcare.gov/ffm_ab_registration_lists
Agent and Broker Marketplace Registration Tracker	Searchable database that allows users to look up their Marketplace registration status with the NPN and ZIP Code saved in their MLMS profile for the current Plan Year	https://data.healthcare.gov/ab-registration-tracker/
Find Local Help	Tool available on HealthCare.gov that enables consumers to search for a local, Marketplace-registered agent and broker to assist with Marketplace enrollment	https://localhelp.healthcare.gov/

Agent and Broker Resource Links (continued)



Resource	Description	Link
Help On Demand	Consumer assistance referral system operated by Help On Demand (formerly known as BigWave Systems) that connects consumers seeking assistance with Marketplace-registered, state- licensed agents and brokers in their area who can provide immediate assistance with Marketplace plans and enrollments	https://www.cms.gov/ccio/programs-and-initiatives/health-insurance-marketplaces/help-on-demand-for-agents-and-brokers
Agent and Broker Video Learning Center	The Agent and Broker Video Learning Center features technical assistance videos on a variety of topics to help agents and brokers navigate the Marketplace.	https://bit.ly/3hXLyru
Frequently Asked Questions for Agents and Brokers	Provides answers to commonly asked questions about working with the Marketplace and helping clients enroll in and maintain their coverage	https://www.agentbrokerfaq.cms.gov/s/
List of Approved Health-related Lines of Authority	Provides a list of valid health-related lines of authority for agents and brokers by resident state	https://data.healthcare.gov/AB-NIPR-Health-Line-Of-Authority
Partner Directory for Agents and Brokers	List of approved, participating issuers and web-brokers includes entities that offer online resources for agents and brokers, such as enrollment and client management functionality	https://data.healthcare.gov/issuer-partner-lookup

Agent and Broker Resource Links (continued)



Resource	Description	Link
National Insurance Producer Registry	Provides licensure and compliance information for agents and brokers	https://nipr.com/licensing-center/add-a-line-of-authority
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	https://nipr.com/help/look-up-your-npn



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 during this OEP and beyond!