



# Review of Resources, Help Desks, and Call Centers for Marketplace Agents and Brokers



*March 15, 2018*

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

# 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.*

*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 Agents and Brokers Resources webpage (<http://go.cms.gov/CCIIOAB>) and [Marketplace.CMS.gov](http://Marketplace.CMS.gov) to learn more.*

*Unless indicated otherwise, the general references to “Marketplace” in the presentation only includes 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.*

# Webinar Agenda

- New Webinar Platform and Features
- Agents and Brokers Resources Webpage
- Other Online Resources
- Help Desks and Call Centers
- Best Practices for Troubleshooting Technical Issues
- Other Marketplace Updates
- Questions and Answers

# New Webinar Platform

- Effective February 22, 2018, CMS implemented a new, user-friendly webinar platform to broadcast Registration for Technical Assistance Portal (REGTAP) training events.
- Webinar participants no longer need to dial into a phone line, but may simply click a link to see and hear the broadcast through their device, including mobile devices.
- Participants submit all questions exclusively through a question and answer (Q&A) panel, and CMS subject matter experts will respond during the webinar or afterwards as needed.
- Participants should plan to access the webinar using Internet Explorer for the best user experience.

# New Webinar Platform: Participant View

The screenshot displays the participant view of a SimpleAttend webinar. The interface includes a top navigation bar with the CMS logo, a title bar for the session, and links for Announcements, Support, and a Menu. A central content area shows a slide titled 'Practice Run: SimpleAttend WebCast 1/24/18' with two bullet points. A 'Public Q&A' sidebar on the left contains a 'No questions available for display' message and a 'Submit Questions' form. An 'Announcement History' section at the top right shows a list of announcements. A 'Submit Questions' button is located at the bottom left. A 'Thank you for your participation' pop-up message is shown on the right side. A 'SimplyAttend' logo is visible in the bottom right corner.

**Public Q&A**

**Announcement History**

**Submit Questions**

**Announcement Pop Up**

**Public Q&A**

**Announcement History**

**Submit Questions**

**Announcement Pop Up**

# Review of Resources, Help Desks, and Call Centers for Marketplace Agents and Brokers



*Agents and  
Brokers  
Resources  
Webpage*

# Overview of the Resources for Agents and Brokers Webpage

- Primary outlet for agents and brokers to receive information from CMS about working in the Health Insurance Marketplace
- Provides the latest news and resources, including newsletters, webinars, fact sheets, videos, and tip sheets
- <http://go.cms.gov/CCIIOAB>

The screenshot shows the CMS.gov website with the following structure:

- Header:** CMS.gov logo, navigation links (Home, About CMS, Newsroom, Archive, Share, Help, Print), and a search bar.
- Navigation Bar:** Medicare, Medicaid/CHIP, Medicare-Medicaid Coordination, Private Insurance, Innovation Center, Regulations & Guidance, Research, Statistics, Data & Systems, Outreach & Education.
- Breadcrumbs:** CCIIO Home > Health Insurance Marketplaces > Resources for Agents and Brokers in the Health Insurance Marketplaces.
- CCIIO Section:**
  - Programs and Initiatives:**
    - Consumer Support and Information
    - Health Insurance Market Reforms
    - Health Insurance Marketplaces
      - In-Person Assistance in the Health Insurance Marketplaces
      - Qualified Health Plan Certification
      - State Marketplace Resources
      - Small Business Health Options Program (SHOP)
      - 2018 Projected Health Insurance Exchange Coverage Maps
    - Insurance Programs
    - Other Insurance Protections
  - The Center for Consumer Information & Insurance Oversight**
  - 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) Marketplace.
    - Background:** To the extent permitted by states, licensed agents and brokers may assist consumers determine their eligibility for insurance affordability programs, including advance payments of the premium tax credit and cost-sharing reductions, and enroll them in qualified health plans (QHPs). Agents and brokers play a crucial role in educating consumers about the Health Insurance Marketplace, both during annual Open Enrollment and throughout the coverage year. Agents and brokers may also help employers understand their options for participating in the SHOP Marketplace and assist them and their employees through the SHOP Marketplace application and enrollment process. Some states have set up their own State-based individual and small business Marketplaces, while the Federal Government runs the Health Insurance Marketplace and SHOP Marketplaces located on HealthCare.gov in other states. You can find out if a state is running its own Marketplace by visiting HealthCare.gov and selecting the state from the drop down. Agents and brokers can help consumers apply for and choose insurance options in any state in which the agents and brokers are licensed with a valid health line of authority, regardless of whether the Marketplaces are operated by the state or Federal Government. Agents and brokers who wish to assist consumers in the Health Insurance
- Resources for Agents and Brokers (Sidebar):**
  - [Resources for Agents and Brokers in the Health Insurance Marketplaces](#)
  - [General Resources](#)
  - [Plan Year 2018 Open Enrollment](#)
  - [Plan Year 2018 Registration and Training](#)
  - [SHOP Marketplace](#)
  - [Web-brokers in the Health Insurance Marketplace](#)
  - QUICK LINKS:**
    - [NPN Validation FAQs](#)
    - [Agent/Broker Newsletters](#)
    - [Agent/Broker Help Desks](#)
    - [Registration Completion List](#)
    - [Find Local Help](#)
    - [Help On Demand](#)
    - [Direct Enrollment Partners Using Single Site Application](#)

# Review of Sidebar Links on the Resources for Agents and Brokers Webpage

General Resources links to guidance, regulations, newsletters, previous webinar slides, quick reference guides, and more.

## 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) Marketplace.

### Background

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## Resources for Agents and Brokers

[Resources for Agents and Brokers in the Health Insurance Marketplaces](#)

[General Resources](#)

[Plan Year 2018 Open Enrollment](#)

[Plan Year 2018 Registration and Training](#)

[SHOP Marketplace](#)

[Web-brokers in the Health Insurance Marketplace](#)

### QUICK LINKS:

[NPN Validation FAQs](#)

[Agent/Broker Newsletters](#)

[Agent/Broker Help Desks](#)

[Registration Completion List](#)

[Find Local Help](#)

# Review of Sidebar Links on the Resources for Agents and Brokers Webpage (Continued)

The Open Enrollment link provides key resources that will help you assist consumers with eligibility and enrollment for the current plan year.

## Resources for Agents and Brokers in the Health Insurance Marketplaces

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## Resources for Agents and Brokers

[Resources for Agents and Brokers in the Health Insurance Marketplaces](#)

### General Resources

[Plan Year 2018 Open Enrollment](#)

[Plan Year 2018 Registration and Training](#)

[SHOP Marketplace](#)

[Web-brokers in the Health Insurance Marketplace](#)

### QUICK LINKS:

[NPN Validation FAQs](#)

[Agent/Broker Newsletters](#)

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[Registration Completion List](#)

[Find Local Help](#)

# Review of Sidebar Links on the Resources for Agents and Brokers Webpage (Continued)

The Registration and Training link describes the process and requirements for completing annual Marketplace registration and training for agents and brokers.

## Resources for Agents and Brokers in the Health Insurance Marketplaces

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# Review of Sidebar Links on the Resources for Agents and Brokers Webpage (Continued)

The Small Business Health Options Program (SHOP) link provides key resources and tools for assisting employers in applying for and offering SHOP coverage.

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[Registration Completion List](#)

[Find Local Help](#)

# Review of Sidebar Links on the Resources for Agents and Brokers Webpage (Continued)

The Web-brokers link provides information on the application process and other resources for Marketplace web-brokers.

## Resources for Agents and Brokers in the Health Insurance Marketplaces

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[Registration Completion List](#)

[Find Local Help](#)

# Review of Sidebar Links on the Resources for Agents and Brokers Webpage (Continued)

Quick Links go to most frequently used sites and resources.

## Resources for Agents and Brokers in the Health Insurance Marketplaces

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[Registration Completion List](#)

[Find Local Help](#)

[Help On Demand](#)

[Direct Enrollment Partners Using Single Site Application](#)

# General Resources: New Search Tool

Based on your feedback, CMS has recently redesigned the General Resources page to include a new search tool that makes it easier for you to find the information you are looking for.

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### QUICK LINKS:

[NPN Validation FAQs](#)

[Agent/Broker Newsletters](#)

[Agent/Broker Help Desks](#)

[Registration Completion List](#)

[Find Local Help](#)

# General Resources: New Search Tool (Continued)

Now you can quickly search through over 100 resources by filtering on:

Date uploaded

Title

Keywords

Topic name

Type of resource

**General Resources**

This page contains a dynamic list of resources that provide helpful information for agents and brokers as well as web-brokers who enroll consumers in the Health Insurance Marketplace and small employers in Small Business Health Options Program (SHOP) health insurance. This list includes guidance, regulations, newsletters, previous webinar slides, quick reference guides, and more.

Search the list below for a topic or by keyword to find resources that are relevant to your questions.

Show entries: 10 ▼

Filter On:

Date	Topic	Title	Type of Resource
<a href="#">2017-12</a>	Medicare	Medicare and the Marketplace	Webinar Slides
<a href="#">2017-12</a>	Help On Demand	Tips for Maximizing Your Participation in Help On Demand	General Resources
<a href="#">2017-12</a>	Help Desks	Agent/Broker Help Desks	Webinar Slides
<a href="#">2017-11</a>	SHOP Changes	Overview of Proposed Changes to SHOP Enrollment	Webinar Slides
<a href="#">2017-11</a>	Direct Enrollment Partners	Direct Enrollment Partners Using Single Site Application	General Resources

# General Resources: New Search Tool (Continued)

To search by ***topic name***, type the topic of the resource you are looking for (such as “Help On Demand”) in the **Filter On** search bar.

## General Resources

This page contains a dynamic list of resources that provide helpful information for agents and brokers as well as web-brokers who enroll consumers in the Health Insurance Marketplace and small employers in Small Business Health Options Program (SHOP) health insurance. This list includes guidance, regulations, newsletters, previous webinar slides, quick reference guides, and more.

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**Filter On:**

<a href="#">Date</a> ▼	<a href="#">Topic</a> ▴ ▾	<a href="#">Title</a> ▴ ▾	<a href="#">Type of Resource</a> ▴ ▾
<a href="#">2017-12</a>	Help On Demand	Tips for Maximizing Your Participation in Help On Demand	General Resources
<a href="#">2017-10</a>	Help On Demand	Help On Demand Overview	General Resources
<a href="#">2017-10</a>	Help On Demand	Help On Demand	General Resources

Showing 1 to 3 of 3 entries (filtered from 114 total entries)

⏪ ⏴ 1 ⏵ ⏩

# General Resources: New Search Tool (Continued)

To view or download a resource, click on its date.

## General Resources

This page contains a dynamic list of resources that provide helpful information for agents and brokers as well as web-brokers who enroll consumers in the Health Insurance Marketplace and small employers in Small Business Health Options Program (SHOP) health insurance. This list includes guidance, regulations, newsletters, previous webinar slides, quick reference guides, and more.

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<a href="#">Date</a> ▼	<a href="#">Topic</a> ▾	<a href="#">Title</a> ▾	<a href="#">Type of Resource</a> ▾
<a href="#">2017-12</a>	Help On Demand	Tips for Maximizing Your Participation in Help On Demand	General Resources
<a href="#">2017-10</a>	Help On Demand	Help On Demand Overview	General Resources
<a href="#">2017-10</a>	Help On Demand	Help On Demand	General Resources

**Showing 1 to 3 of 3 entries (filtered from 114 total entries)**

[⏪](#) [⏴](#) [1](#) [⏵](#) [⏩](#)

# General Resources: New Search Tool (Continued)

You will then be directed to a new page with resource details and a link to download.

The screenshot displays the CMS.gov website interface. At the top, the CMS.gov logo and 'Centers for Medicare & Medicaid Services' are visible. Navigation links include Home, About CMS, Newsroom, FAQs, Archive, Share, Help, and Print. A search bar is present with the text 'Learn about your health care options' and a 'Search' button. Below the navigation bar, there are several yellow buttons for different categories: Medicare, Medicaid/CHIP, Medicare-Medicaid Coordination, Private Insurance, Innovation Center, Regulations & Guidance, Research, Statistics, Data & Systems, and Outreach & Education. The breadcrumb trail shows the path: Home > CCIIO > Health Insurance Marketplaces > General Resources Items > Details for title: 2017-12. On the left, there is a sidebar with 'Health Insurance Marketplaces' and a 'Return to List' link. The main content area is titled 'Details for title: 2017-12' and contains a table with the following information:

Date	2017-12
Topic	Help On Demand
Title	Tips for Maximizing Your Participation in Help On Demand
Type of Resource	General Resources

Below the table, there is a 'Downloads' section. A red box highlights the download link: 'Tips for Maximizing Your Participation in Help On Demand [PDF, 620KB]' with a PDF icon. Below this link is a link to 'Help with File Formats and Plug-Ins'.

# General Resources: New Search Tool (Continued)

To return to the Agents and Brokers Resources webpage home page at any time, click the “Agent and Broker Landing Page” link at the bottom of the “General Resources” page.

The screenshot displays the 'General Resources' page. At the top, there are navigation tabs for Medicare, Medicaid/CHIP, Medicare-Medicaid Coordination, Private Insurance, Innovation Center, Regulations & Guidance, Research, Statistics, Data & Systems, and Outreach & Education. Below these is a breadcrumb trail: Home > CCIO > Health Insurance Marketplaces > General Resources. A 'FEED' icon is also present. On the left, a sidebar shows 'Health Insurance Marketplaces'. The main content area is titled 'General Resources' and contains a description of the page's purpose. Below this is a search section with a 'Show entries' dropdown set to 10, a 'Filter On:' input field containing 'privacy', and a table of results. The table has columns for Date, Topic, Title, and Type of Resource. One result is shown for 2017-10, Topic: Marketplace Privacy, Title: Marketplace Privacy & Security Requirements for Agents and Brokers, and Type: Webinar Slides. At the bottom, a 'Related Links' section contains a link to 'Agent and Broker Landing Page' which is highlighted with a red box.

Medicare Medicaid/CHIP Medicare-Medicaid Coordination Private Insurance Innovation Center Regulations & Guidance Research, Statistics, Data & Systems Outreach & Education

Home > CCIO > Health Insurance Marketplaces > General Resources FEED

**Health Insurance Marketplaces**

## General Resources

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Search the list below for a topic or by keyword to find resources that are relevant to your questions.

Show entries: 10

Filter On: privacy

Date	Topic	Title	Type of Resource
2017-10	Marketplace Privacy	Marketplace Privacy & Security Requirements for Agents and Brokers	Webinar Slides

Showing 1 to 1 of 1 entries (filtered from 114 total entries)

Related Links

[Agent and Broker Landing Page](#)

# General Resources: New Search Tool (Continued)

To go to the Health Insurance Marketplaces home page at any time, click the “Health Insurance Marketplaces” button on the left sidebar.

Medicare Medicaid/CHIP Medicare-Medicaid Coordination Private Insurance Innovation Center Regulations & Guidance Research, Statistics, Data & Systems Outreach & Education

Home > CCIO > Health Insurance Marketplaces > General Resources

**Health Insurance Marketplaces**

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2017-10	Marketplace Privacy	Marketplace Privacy & Security Requirements for Agents and Brokers	Webinar Slides

Showing 1 to 1 of 1 entries (filtered from 114 total entries)

1

### Related Links

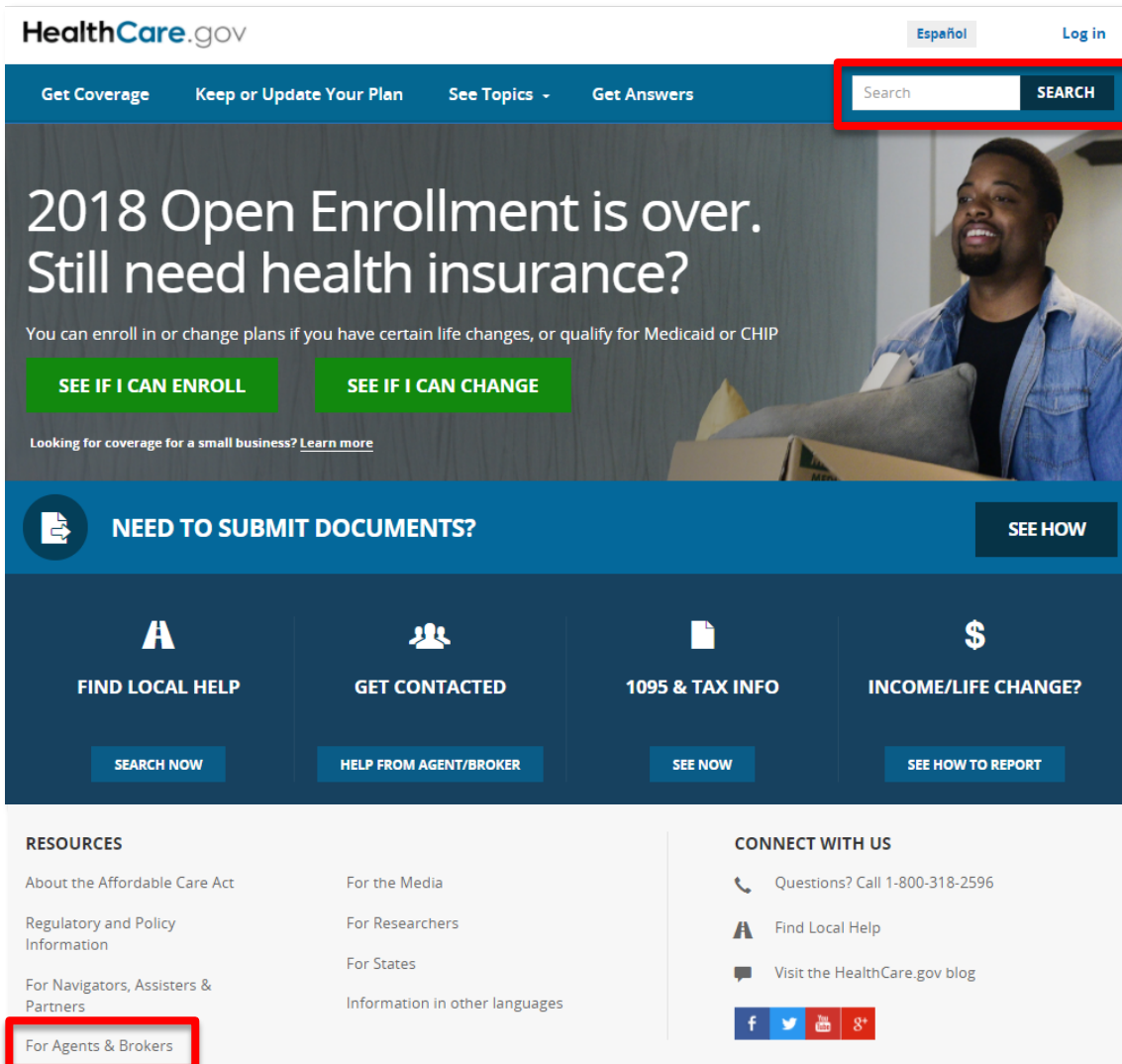
[Agent and Broker Landing Page](#)

# Review of Resources, Help Desks, and Call Centers for Marketplace Agents and Brokers



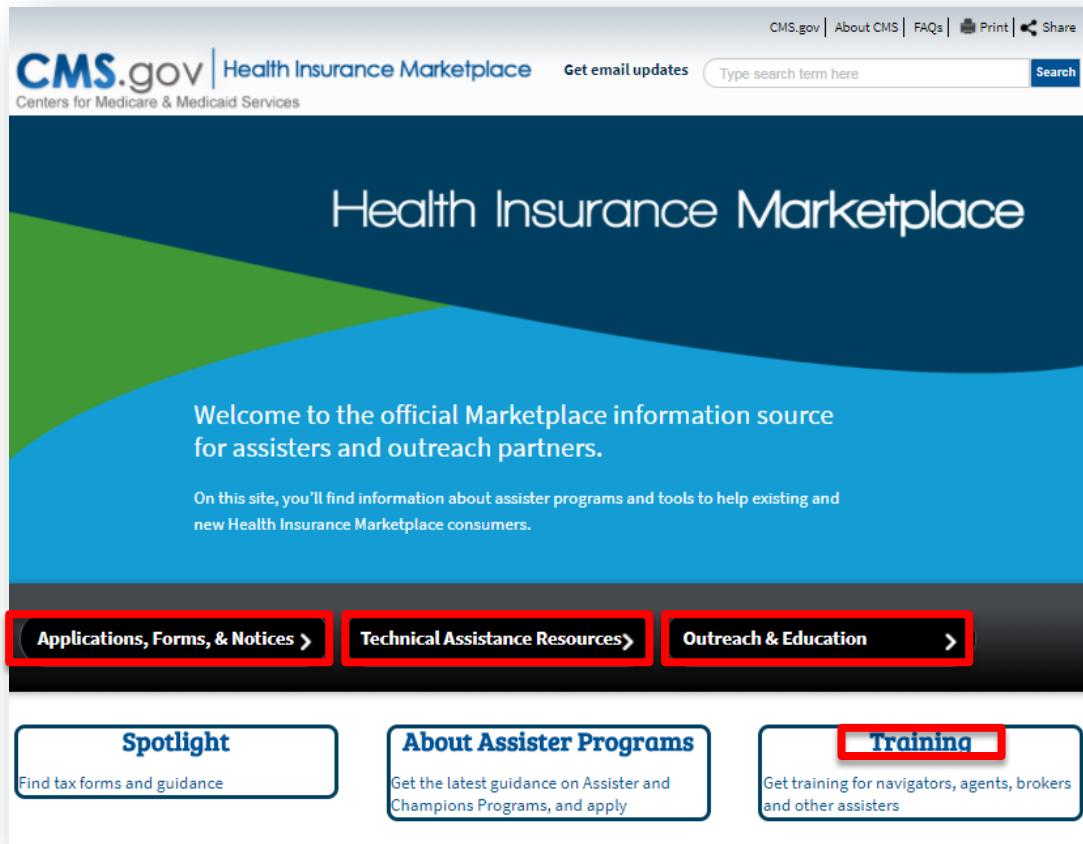
*Other Online  
Resources*

# HealthCare.gov



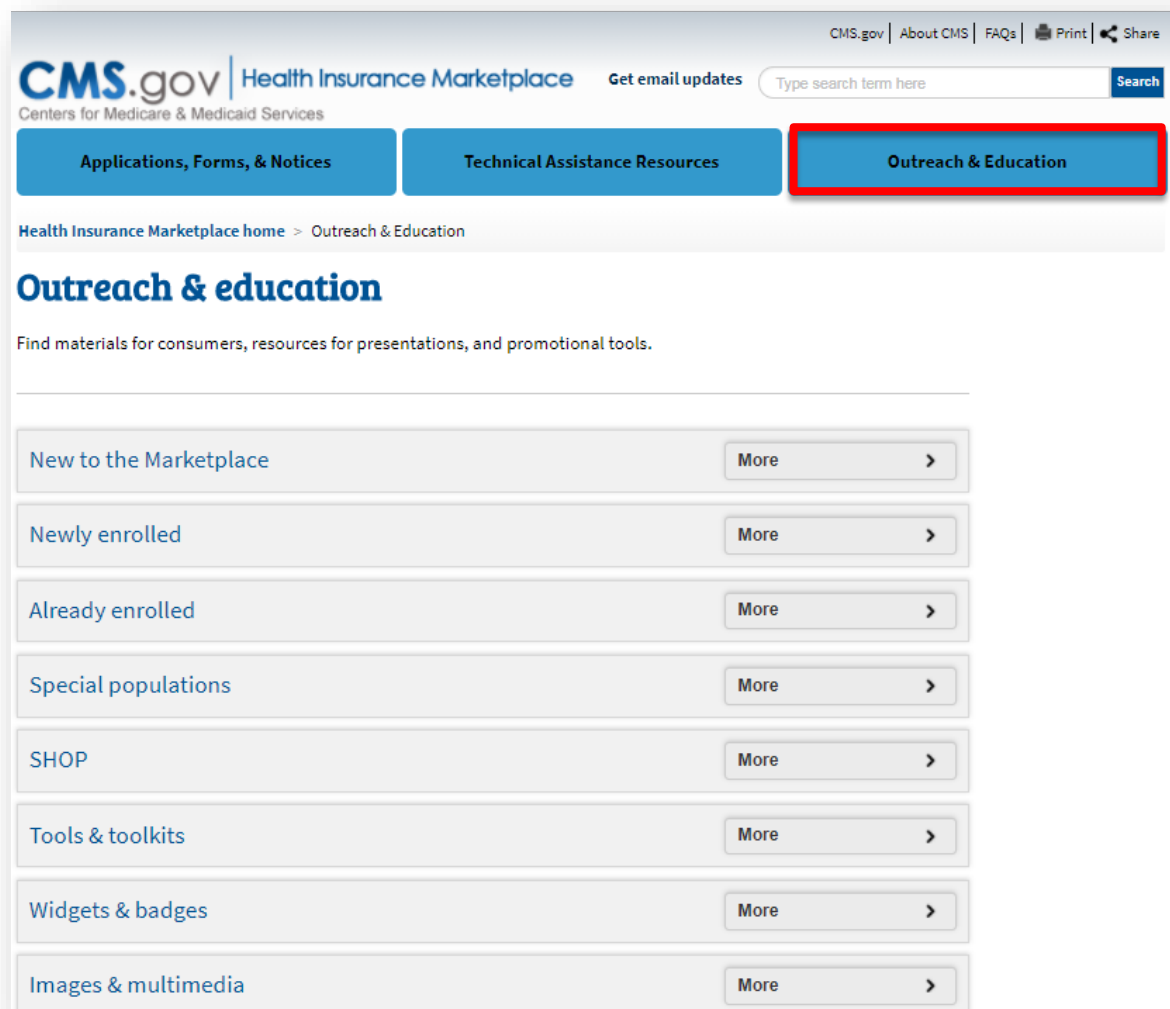
- Official site of the Health Insurance Marketplace
- Primarily consumer-facing
- Use the “Search” function to search topics by key word
- Contains a link at the bottom of the page to make it easier for you to get to the Agents and Brokers Resources webpage

# Marketplace.CMS.gov



- Official Marketplace information source for assisters and outreach partners
- Contains links to
  - Applications, forms, and notices
  - Technical assistance resources
  - Outreach and education
  - Assister Training

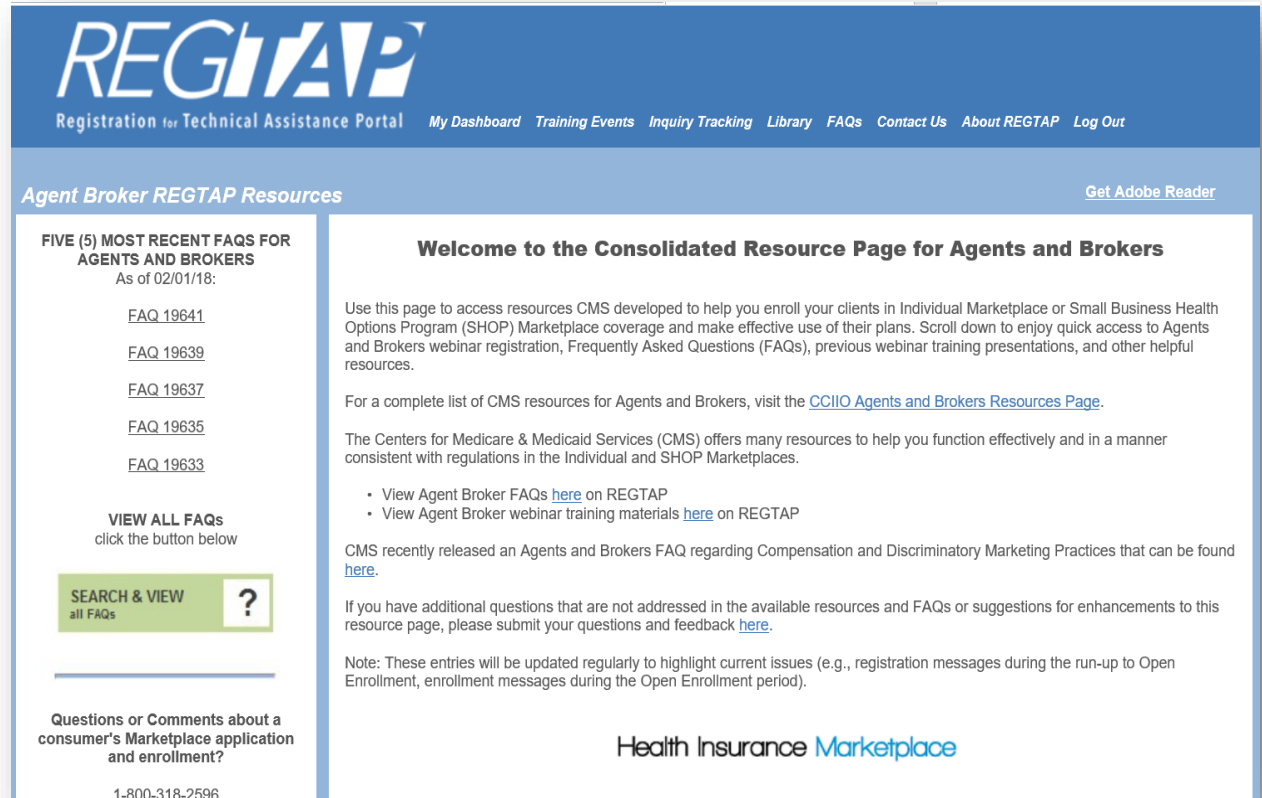
# Marketplace.CMS.gov: Outreach & Education



- Clicking on the “Outreach & Education” button on Marketplace.CMS.gov takes you to this screen.
- Contains links to resources you can use during Open Enrollment and throughout the year

# Registration for Technical Assistance Portal (REGTAP) Agent and Broker Page

- Serves as an information hub for CMS technical assistance related to Marketplace programs
- Allows registered users to view and register for technical assistance webinars
- <https://www.regtap.info>



The screenshot displays the REGTAP (Registration for Technical Assistance Portal) website. The header features the REGTAP logo and navigation links: My Dashboard, Training Events, Inquiry Tracking, Library, FAQs, Contact Us, About REGTAP, and Log Out. The main content area is titled "Agent Broker REGTAP Resources" and includes a "Get Adobe Reader" link. On the left, a section titled "FIVE (5) MOST RECENT FAQs FOR AGENTS AND BROKERS" lists FAQs 19641, 19639, 19637, 19635, and 19633, with a "VIEW ALL FAQs" button. Below this is a "SEARCH & VIEW all FAQs" button with a question mark icon. The right side of the page has a "Welcome to the Consolidated Resource Page for Agents and Brokers" section, followed by a paragraph about CMS resources, a link to the "CCIIO Agents and Brokers Resources Page", and a list of links to view Agent Broker FAQs and webinar training materials. A note mentions a recently released FAQ regarding Compensation and Discriminatory Marketing Practices. The footer includes the text "Questions or Comments about a consumer's Marketplace application and enrollment?" and the phone number "1-800-318-2596". The "Health Insurance Marketplace" logo is also present.

# Other Resources

Resource	Description	Link
Registration Completion List	Public list of agents and brokers who have completed Marketplace registration; used by issuers to verify your eligibility for compensation for assisting with consumer enrollments	<a href="https://data.healthcare.gov/fm_ab_registration_lists">https://data.healthcare.gov/fm_ab_registration_lists</a>
Find Local Help	Tool available on HealthCare.gov that enables consumers to search for a local, Marketplace-registered agent or broker with a valid health line of authority to assist with FFM enrollment	<a href="https://localhelp.healthcare.gov/">https://localhelp.healthcare.gov/</a>
CMS Enterprise Portal	Allows you to securely complete identity-proofing and access the Marketplace Learning Management System (MLMS) to complete annual, required agent and broker training and registration	<a href="https://portal.cms.gov">https://portal.cms.gov</a>
Agent and Broker National Producer Numbers (NPNs)	Provides a search function to determine the correct NPN to enter in your MLMS profile and on Marketplace applications	<a href="http://www.nipr.com/PacNpnSearch.htm">www.nipr.com/PacNpnSearch.htm</a>
LinkedIn for Marketplace Agents and Brokers	Contains posts with announcements, new resources, upcoming webinars, and more information for Marketplace agents and brokers	<a href="https://www.linkedin.com/showcase/cms-ab">https://www.linkedin.com/showcase/cms-ab</a>

# Review of Resources, Help Desks, and Call Centers for Marketplace Agents and Brokers



*Help Desks and  
Call Centers*

# Agent/Broker Marketplace Help Desks and Call Centers

Help Desk Name	Phone # and/or Email Address	Types of Inquiries Handled	Hours of Operation (Closed Holidays)
Direct Agent/Broker Partner Line	855-788-6275  Note: Enter your NPN to access this line	Inquiries related to specific consumers: <ul style="list-style-type: none"> <li>• Password resets for consumer HealthCare.gov accounts</li> <li>• Special enrollment periods (SEPs) not available on the consumer application</li> <li>• Eligibility and enrollment issues related to the Individual Marketplace</li> </ul>	Monday-Sunday 24 hours/day
Agent/Broker Email Help Desk	<a href="mailto:FFMProducer-AssisterHelpDesk@cms.hhs.gov">FFMProducer-AssisterHelpDesk@cms.hhs.gov</a>	<ul style="list-style-type: none"> <li>• General enrollment and compensation questions</li> <li>• Identity proofing/Experian issues requiring manual verification</li> <li>• Escalated general registration and training questions (not related to a specific training platform)</li> <li>• Agent/Broker Registration Completion List issues</li> <li>• Find Local Help and Help On Demand issues</li> </ul>	Monday-Friday 8:00 AM-6:00 PM ET

# Agent/Broker Marketplace

## Help Desks and Call Centers (Continued)

Help Desk Name	Phone # and/or Email Address	Types of Inquiries Handled	Hours of Operation (Closed Holidays)
Marketplace Service Desk	855-CMS-1515 855-267-1515 <a href="mailto:CMS_FEPS@cms.hhs.gov">CMS_FEPS@cms.hhs.gov</a>	<ul style="list-style-type: none"> <li>• Password resets and account lockouts on the CMS Enterprise Portal (used to access the MLMS, the agent/broker training and registration system)</li> <li>• Login issues on the agent/broker landing page used for Direct Enrollment (often due to FFM User ID not populating correctly when the agent or broker is redirected from an issuer's or web-broker's site)</li> <li>• Other CMS Enterprise Portal account issues, requests, or error messages</li> <li>• 501 Downstream Error message on HealthCare.gov website issues</li> <li>• General registration and training questions (not related to a specific training platform)</li> </ul>	Monday-Friday 8:00 AM-8:00 PM ET

# Agent/Broker Marketplace

## Help Desks and Call Centers (Continued)

Help Desk Name	Phone # and/or Email Address	Types of Inquiries Handled	Hours of Operation (Closed Holidays)
Agent/Broker Training and Registration Email Help Desk	<a href="mailto:MLMSHelpDesk@cms.hhs.gov">MLMSHelpDesk@cms.hhs.gov</a>	<ul style="list-style-type: none"> <li>Technical or system-specific issues related to the agent/broker training and registration system (i.e., the MLMS)</li> <li>User-specific questions about maneuvering in the MLMS site, or accessing training and exams</li> </ul>	Monday-Friday 8:00 AM-5:30 PM ET
SHOP Call Center	800-706-7893	<ul style="list-style-type: none"> <li>All inquiries related to the SHOP</li> <li>SHOP agent/broker portal access questions</li> <li>Employers and employees may also contact the SHOP Call Center for assistance</li> </ul>	Monday-Friday 9:00 AM-7:00 PM ET  <b>Effective 3/28: 9:00 AM-5:00 PM ET</b>
Direct Enrollment Email Help Desk	<a href="mailto:DirectEnrollment@cms.hhs.gov">DirectEnrollment@cms.hhs.gov</a>	<ul style="list-style-type: none"> <li>All inquiries specifically related to becoming and/or operating as a direct enrollment web-broker in the Marketplace</li> </ul>	Monday-Friday 9:00 AM-5:00 PM ET

# CMS-Approved Vendors for Marketplace Agent and Broker Training

Help Desk Name	Phone # and/or Email Address	Types of Inquiries Handled	Hours of Operation (Closed Holidays)
America's Health Insurance Plans (AHIP) Training Help Desk	<a href="mailto:support@ahipinsuranceeducation.org">support@ahipinsuranceeducation.org</a> 800-984-8919	All inquiries specifically related to the AHIP agent/broker training platform	<b>Call Center/Email</b> Monday-Friday: 8:00 AM-9:00 PM ET Saturday: 8:30 AM-5:30 PM ET
Litmos Training Help Desk	<a href="mailto:cmsffmsupport@litmos.com">cmsffmsupport@litmos.com</a> 844-675-6565	All inquiries specifically related to the Litmos agent/broker training platform	<b>Call Center</b> Monday-Friday 9:00 AM-5:00PM PST <b>Email</b> 24 hours/day
National Association of Health Underwriters (NAHU) Training Help Desk	<a href="mailto:NAHU-FFM@nahu.org">NAHU-FFM@nahu.org</a> 844-257-0990	All inquiries specifically related to the NAHU agent/broker training platform	<b>Call Center:</b> Monday-Friday: 9:00 AM-5:00 PM ET <b>Technical Support:</b> Monday-Friday: 8:00 AM-9:00 PM ET Saturday-Sunday: 8:00 AM-8:00 PM ET

# Review of Resources, Help Desks, and Call Centers for Marketplace Agents and Brokers



*Best Practices for  
Troubleshooting  
Technical Issues*

# Tips for Resolving Technical Issues

- In most cases, you can use the online resources presented above to assist consumers without contacting the Marketplace Call Center.
- Using self-service options frees up Help Desk and Call Center Representatives (CCRs) for more complex cases and reduces wait times for everyone.
- When you need to contact the Marketplace Call Center, try to avoid the following:
  - Calling during peak times—especially between 10:00 AM and 2:00 PM ET
  - Calling around the enrollment deadline (i.e., December 10-15)
  - Calling during HealthCare.gov outages (CCRs use the same tool for application/enrollment assistance)

# Authorization Required to Access Client Information via the Marketplace Call Center

- When contacting the Marketplace Call Center, consumers can grant permission to allow you to access their account information.
  - This Marketplace Call Center authorization is not the same as ensuring your NPN is on the consumer's application for payment purposes with issuers.
- Consumers will be asked to:
  - Provide the Marketplace Call Center with your full name and NPN
  - Elect the length of time the authorization is valid—this can be one call or up to 365 days
  - Update the authorization as needed prior to the beginning of Open Enrollment
- This authorization allows you to:
  - Call the Marketplace Call Center and access a consumer's information on the consumer's behalf
  - Participate in a three-way call with a Marketplace CCR and the consumer

# When Is It Appropriate for Agents and Brokers to Seek Marketplace Call Center Assistance?

- You may direct consumer application questions or issues to the Marketplace Call Center.
- The following complex consumer situations may require support from the Marketplace Call Center:
  - You need to check the status of a consumer's data matching or SEP verification issue.
  - The consumer is part of a multi-tax household, and requires guidance on which household members should be part of different application groups.
  - You or the consumer are having technical difficulties completing the online application.
- For password resets for consumer HealthCare.gov accounts and SEPs not available on the consumer application, use the Direct Agent/Broker Partner Line (855-788-6275). You will need to enter your NPN to gain access.

# When Is It Not Appropriate for Agents and Brokers to Seek Marketplace Call Center Assistance?

- The consumer (or you with the consumer's assistance) has not attempted to complete all required data fields in the online application.
  - Note the Marketplace Call Center is not staffed to enter consumer information for multiple applications.
- The consumer does not have ready access to personal information and/or specific documentation required to complete enrollment.
  - Use the [Marketplace Application Checklist](#) when helping consumers complete their applications and to be sure they are prepared to contact the Marketplace Call Center.
- You do not have a current Marketplace Call Center authorization and the consumer is not on the line.
  - Remember, Marketplace Call Center CCRs will not provide you any information about a consumer's application if the consumer is not part of the three-way call or has not previously authorized you to work on his or her behalf.

# Review of Resources, Help Desks, and Call Centers for Marketplace Agents and Brokers

*Other Marketplace  
Updates*

# Upcoming Activities

- The slides from this webinar are already available on REGTAP at [www.REGTAP.info](http://www.REGTAP.info) and will be available on the [Resources for Agents and Brokers webpage](#) in the coming days.
- Watch your email for invitations to upcoming webinars.

**TOMORROW**

***Upcoming Assister Webinar\****  
***March 16, 2:00-3:30 PM ET***  
***Agents/Brokers Welcome!***

Medicare Periodic Data  
Matching

***Upcoming Agent/Broker  
Webinar\****  
***March 29, 2:00-3:00 PM ET***

Transitions To and From  
Employer-sponsored Coverage

\*Webinar dates and topics are subject to change. CMS will share current webinar information via email.

# Acronym Definitions

Acronym	Definition
CCIIO	Center for Consumer Information and Insurance Oversight
CCR	Call Center Representative
CMS	Centers for Medicare & Medicaid Services
FFM	Federally-facilitated Marketplace
MLMS	Marketplace Learning Management System
NPN	National Producer Number
Q&A	Question and Answer
REGTAP	Registration for Technical Assistance Portal
SBM	State-based Marketplace
SBM-FP	State-based Marketplace on the Federal Platform
SEP	Special Enrollment Period
SHOP	Small Business Health Options Program