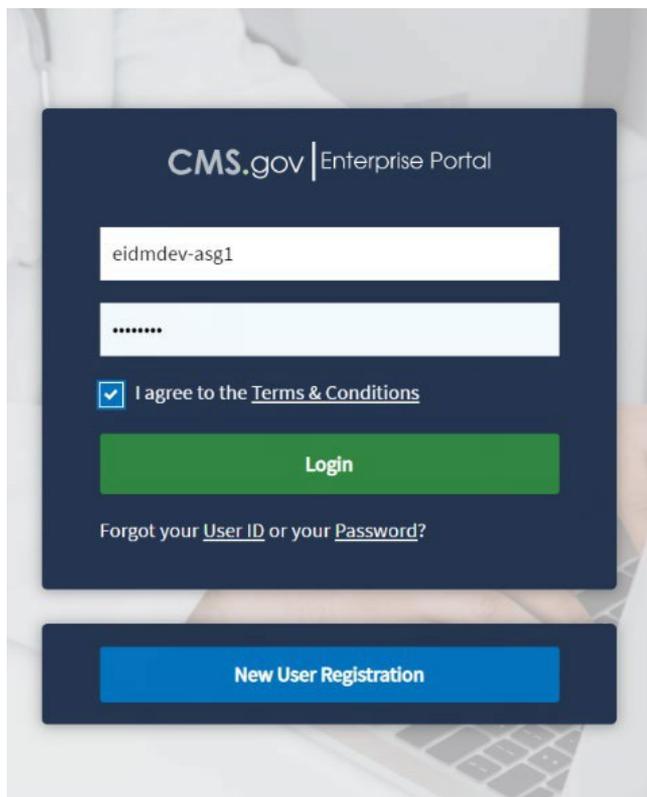




Enterprise Identity Management (EIDM) to Identity Management (IDM) Transition



February 19, 2021

**Last updated August 2022*

*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 learners 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 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 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.

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Questions and Answers

- At the end of today's presentation, you can dial into the phone queue to ask a live question.
- Please dial 866-549-8866 and enter your unique PIN that was provided in your reminder email from the Registration for Technical Assistance Portal (REGTAP). Once on the line please dial star (*) pound (#) to enter the question queue.
- You may also enter questions using the Q&A panel on your webinar screen. Please note, if CMS responds to your submitted Q&A panel question - your question and your name will display to all attendees.

Agenda

- Overview
- What to Expect
- How to Prepare
- Review the current and new flow for returning/registered agents/brokers
- Review the current and new flow for new agents/brokers
- Overview of Agent/Broker Marketplace Help Desks and Call Centers
- Q&A

Overview: Transition from EIDM to IDM



Highlight the changes and discuss the impacts to Agents and Brokers following the migration to a new identity management system within the CMS Portal.

IDM: What to Expect

- The migration will occur between Friday, 2/19/2021 at 9:00 PM ET and Monday, 2/22/2021 at 8:00 AM ET.
- Returning/Registered Agents/Brokers:
 - The Agent/Broker Registration Status page has been removed
 - Multi-Factor Authentication settings will not be migrating to the new system
- New Agents/Brokers:
 - There will be little to no impact
 - Social Security Number is now required for all agents/brokers

How to Prepare – Current Users

- Prior to February 20, 2021:
 - Check the email address associated with your CMS Portal account and ensure you have access to this account.
 - Any User ID or Password Reset emails will be directed there
- After February 22, 2021:
 - If you experience issues logging into the CMS portal, please contact the Marketplace Service Desk – 1-855-267-1515 or CMS_FEPS@cms.hhs.gov

Returning/Registered Agents/Brokers – Current Flow

- Current Agent/Broker Registration Status Page

CMS.gov | My Enterprise Portal My Apps Jason Jackson Help Log Out

Screen reader mode Off | Accessibility Settings

My Access

- [Request New System Access](#)
- [View and Manage My Access](#)
- [Annual Certification](#)

Agent Broker Registration Status

Plan Year 2021

Please click the link below next to items marked 'INCOMPLETE' to register as an agent/broker for the 2021 plan year. If you have completed steps 1 and 2 below, Registration Complete should display at the bottom of the page. If your status is not accurate, please log out and log back in later. During busy periods, it may take 30 minutes or longer to finalize registration.

We are experiencing technical difficulties and cannot retrieve your latest training status. If you have completed training and it is not reflected below, please return to this page in the future to confirm your status has been updated. You may still complete identity proofing and any training you have not completed.

FFM - Agents and Brokers Role	Status
1. Complete Identity Proofing	Complete
2. Complete Agent Broker Training:	Incomplete
<ul style="list-style-type: none">• Individual Market• SHOP	
3. Print Certificate(s)	Accessible after completing steps 1 & 2.

Returning/Registered Agents/Brokers – Current Flow (continued)

- Current Training Options Page

CMS.gov | My Enterprise Portal ☰ My Apps 👤 Jason Jackson ▼ 🔗 Help 🚪 Log Out

Screen reader mode Off | Accessibility Settings

My Access

- [Request New System Access](#)
- [View and Manage My Access](#)
- [Annual Certification](#)

Plan Year 2021 Agent/Broker Training Options

Agents and brokers have new options to complete Individual Marketplace and/or SHOP Marketplace training for the 2021 plan year. These include third-party vendors. Third-party vendor training may be approved for continuing education units (CEUs). Select ""Learn More"" next to each vendor's listing to obtain information about pricing and CEUs. Please contact the vendor for more information, or if you are having difficulty accessing the vendor's site.

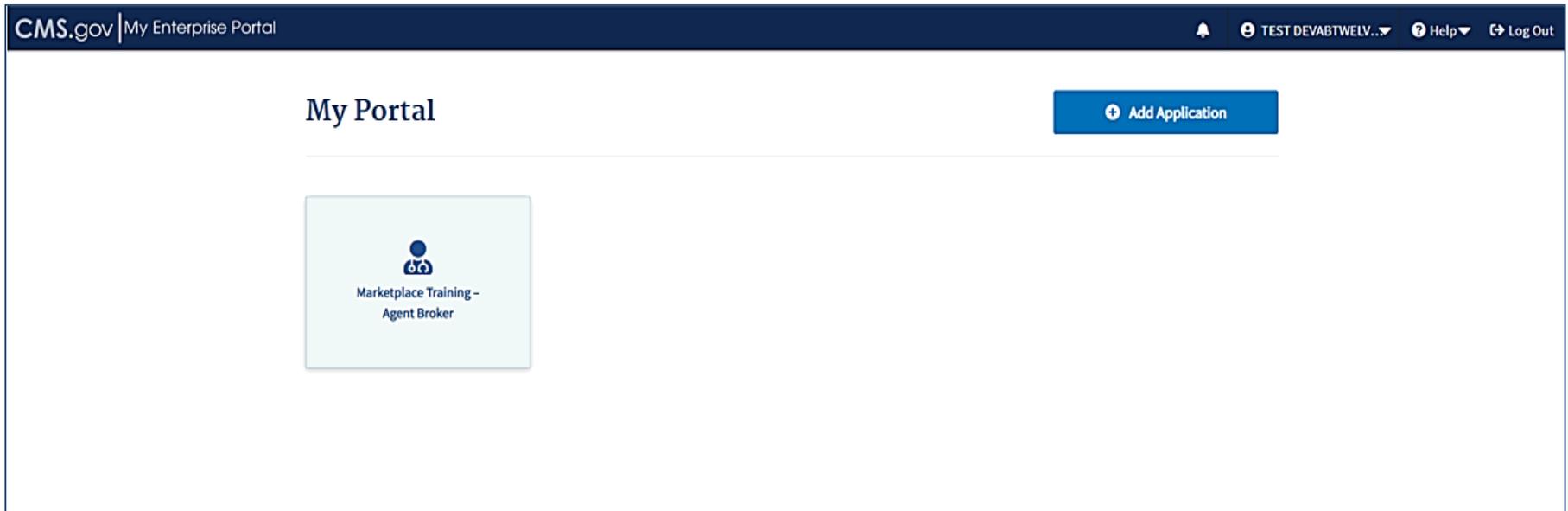
CMS continues to offer training at no charge through its Marketplace Learning Management System (MLMS), but no CEUs are available through the MLMS.

- America's Health Insurance Plans [Learn More](#) [Access Training](#) 800-984-8919
- Marketplace Learning Management System (CMS) [Return to Training](#) MLMSHelpDesk@cms.hhs.gov

[Return to Agent Broker Registration Status Page](#)

Returning/Registered Agents/Brokers – New Flow

- New Portal Tile Page



Returning/Registered Agents/Brokers – New Flow (continued)

- New Training Access Tile

The screenshot displays a web portal interface. At the top left, the text "My Portal" is visible. In the top right corner, there is a blue button with a white plus icon and the text "Add Application". Below this, a dark teal tile is highlighted, featuring a white icon of a person with a gear. The text on the tile reads "Marketplace Training – Agent Broker". Below the tile, a larger dark teal box contains the following text:

Marketplace Training – Agent Broker

MLMS Training - CMS continues to offer training at no charge through its Marketplace Learning Management System (MLMS), but no CEUs are Available through the MLMS.

America's Health Insurance Plans (AHIP) Training – Continuing education units (CEUs) are available through AHIP. You are leaving CMS and will be re-directed to a CMS approved 3rd party vendor.

[Click here to obtain information about AHIP pricing and CEUs, or contact AHIP Helpdesk at: 800-984-8919](#)

Registration Status Tracker – A searchable database that allows an agent and broker to look up their Marketplace registration status for the current plan year.

Returning/Registered Agents/Brokers – Registration Status Tracker

- <https://data.healthcare.gov/ab-registration-tracker/>

The screenshot shows the Data.Healthcare.gov website. The header includes the logo, navigation links for 'Home' and 'Developers', a search icon, and a 'Sign In' button. The main content area features the title 'AGENT AND BROKER MARKETPLACE REGISTRATION TRACKER' and a subtitle 'Current Plan Year Registration Status Lookup Tool'. A blue callout box explains that the tool is a searchable database for checking registration status using NPN and ZIP code. Below this is a 'Find Your Status' section with a prompt to enter both NPN and ZIP code. It contains two input fields: 'NPN (numbers only)' and 'ZIP Code (5 digit only)', followed by a 'View Status' button. At the bottom, it notes 'Data last updated on: 2/12/2021' and provides links for 'About the Tool' and 'Other Resources'.

Data.Healthcare.gov Home Developers Sign In

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 look up your status.

NPN

ZIP Code

Data last updated on: 2/12/2021

[About the Tool](#) [Other Resources](#)

Returning/Registered Agents/Brokers – Registration Status Tracker (continued)

Provides status on the following steps:

- Identity proofing
- Training & Registration
 - IM and SHOP
- NPN Validation
 - Line of Authority (LOA)
 - Licensure
- Find Local Help
- Help On Demand

The screenshot displays the 'AGENT AND BROKER MARKETPLACE REGISTRATION STATUS' page on Data.Healthcare.gov. The page shows a summary of registration status for a user with NPN 1-XXXX-XXXX. The summary includes four categories: Portal (RIDP) Complete, FFM Registered Complete, SHOP Registered Incomplete, and Valid NPN Complete. Below the summary, the 'Registration Status Details by Components' section is divided into three main areas: Portal (RIDP), Training and Registration, and NPN Validation. The Portal (RIDP) section shows 'Portal (RIDP) Status: Complete' with sub-items 'Portal Account Active' and 'ID Proofing' both complete. The Training and Registration section shows 'MLMS Profile Complete' and 'FFM Training and Agreements Complete', while 'SHOP Registered' is incomplete. The NPN Validation section shows 'Valid NPN Status: Complete' with sub-items 'License Status', 'Approved LOA Name', and 'LOA Active' all complete. A footer provides contact information for the Marketplace Service Desk (MSD) and lists various links and policies.

Returning/Registered Agents/Brokers - Multi-factor Authentication (MFA)

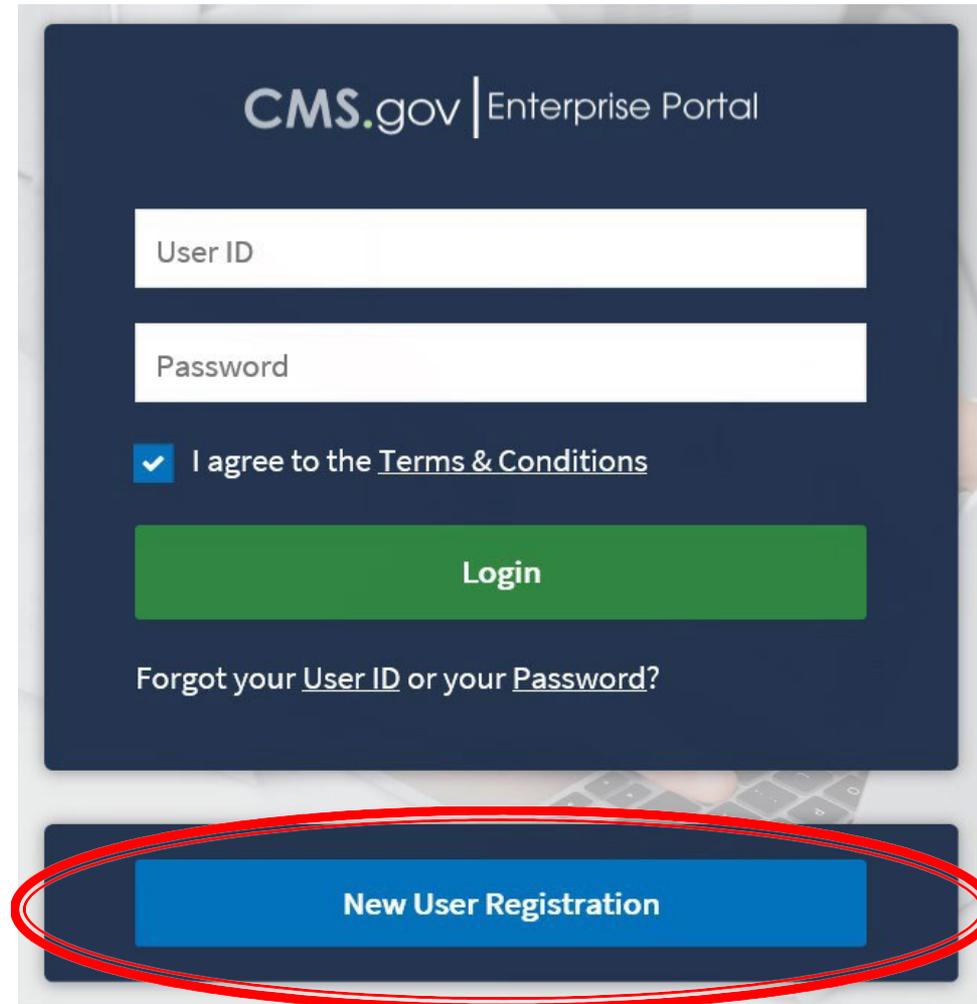
Multi-Factor Authentication in IDM

Email will be the default MFA device for all migrated accounts

- Users can add additional factors once logged in
- Available MFA Devices Include:
 - Email
 - SMS
 - IVR
 - Google Authenticator (Smart Phone App or Chrome Extension)
 - Okta Verify (Smart Phone App)
- Users have the ability to view, add, and remove MFA and Recovery devices using the ***Manage MFA and Recovery Devices*** window. MFA and Recovery device information is part of the user's account profile, so this information is accessed through the IDM Self Service Dashboard using the ***My Profile button***.

New Agents/Brokers

- Navigate to:
 - <https://portal.cms.gov/>
- Select “New User Registration”



The screenshot shows the CMS.gov Enterprise Portal interface. At the top, it says "CMS.gov | Enterprise Portal". Below this are two input fields: "User ID" and "Password". Underneath the password field is a checkbox that is checked, with the text "I agree to the Terms & Conditions". Below the checkbox is a green button labeled "Login". At the bottom of the login section, there is a link that says "Forgot your User ID or your Password?". Below the login section is a blue button labeled "New User Registration", which is circled in red.

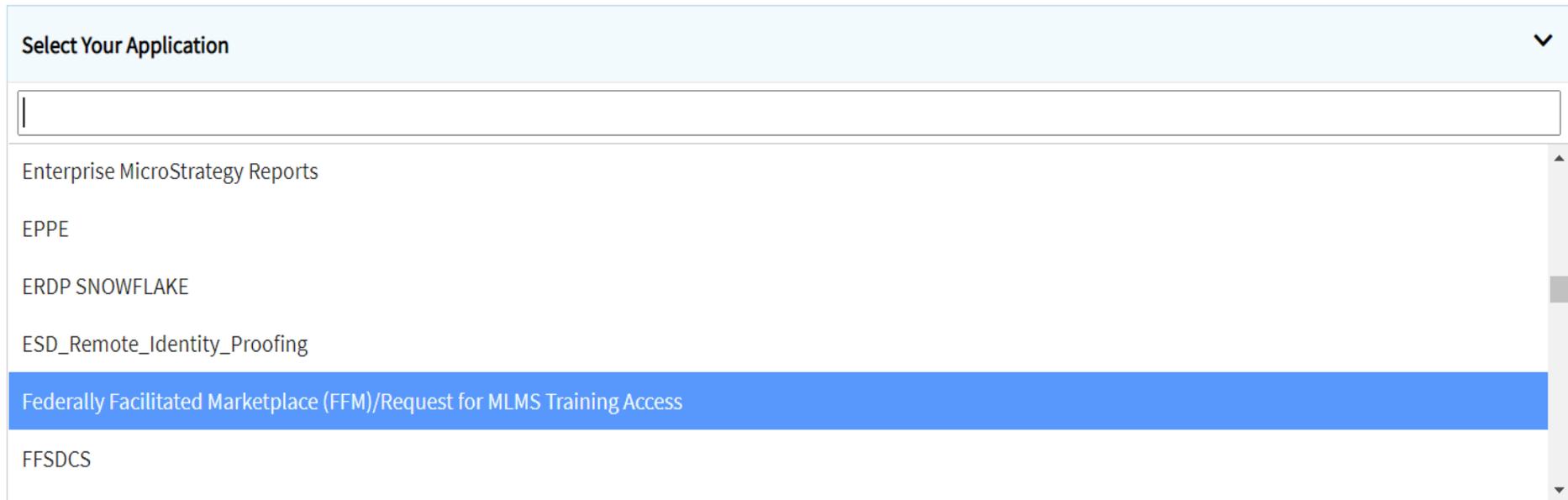
New Agents and Brokers

Creating an Account – Step 1

- Under the Select Your Application drop-down menu, select the “Federally Facilitated Marketplace (FFM)/Request for MLMS Training Access” option.
- Agree to the Terms and Conditions

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.



The screenshot shows a web form with a dropdown menu titled "Select Your Application". The dropdown is open, displaying a list of application options. The option "Federally Facilitated Marketplace (FFM)/Request for MLMS Training Access" is highlighted in blue. Other options include "Enterprise MicroStrategy Reports", "EPPE", "ERDP SNOWFLAKE", "ESD_Remote_Identity_Proofing", and "FFSDCS".

Select Your Application
Enterprise MicroStrategy Reports
EPPE
ERDP SNOWFLAKE
ESD_Remote_Identity_Proofing
Federally Facilitated Marketplace (FFM)/Request for MLMS Training Access
FFSDCS

New Agents and Brokers Creating a Profile – Step 2

- Populate your personal information and contact information.

Step #2: Register Your Information

Step 2 of 3 - Please enter your personal and contact information.

All fields are required unless marked (optional).

<input type="text" value="Enter First Name"/>	<input type="text" value="Enter Middle Name (optional)"/>	<input type="text" value="Enter Last Name"/>	<input type="text" value="Suffix (optional)"/>
<input type="text" value="Select Birth Month"/>	<input type="text" value="Select Birth Date"/>	<input type="text" value="Select Birth Year"/>	
Is Your Address U.S. Based?			
<input checked="" type="radio"/> Yes <input type="radio"/> No			
<input type="text" value="Enter Home Address Line 1"/>	<input type="text" value="Enter Home Address 2 (optional)"/>		
<input type="text" value="Enter City"/>	<input type="text" value="Select State"/>	<input type="text" value="Enter ZIP Code"/>	<input type="text" value="Enter Zip+4 Code (optional)"/>
<input type="text" value="Enter Email Address"/>	<input type="text" value="Confirm Email Address"/>		
<input type="text" value="Enter Phone Number"/>			
<input type="button" value="Back"/>	<input type="button" value="Next"/>	<input type="button" value="Cancel"/>	

New Agents and Brokers

Creating a Profile – Step

- Choose a User ID and Password
- Select a security question and answer
- You will receive an email at the address you listed in your account, notifying you of your successful account creation.

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).

User ID
eldmdevtest1

Enter Password

Confirm Password

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

Security Answer
broccoli

Back Next Cancel

New Agents and Brokers Requesting Application and Role

Log in to the CMS Enterprise Portal and on the **My Portal** page, select the **Add Application** button to access the Application Catalog

My Portal

 Add Application

Welcome to CMS Enterprise Portal.

Welcome Jon Tester to CMS Enterprise Portal.

You can request access to an application by selecting "Add Application" button.

You can review your current roles and pending requests by going to the [My Access](#) page.

New Agents and Brokers

Requesting Application and Role – Step 1

Select the **Federally Facilitated Marketplace (FFM)/Request for MLMS Training Access** option. Then select Next.

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

Application

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

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

[> Help Desk Information](#)

Next

2 Select a Role

3 Enter Reason for Request

New Agents and Brokers

Requesting Application and Role – Step 2

Select **Training Access** from the **Role** drop-down menu and select the Next button.

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

Role
Training Access

i Role Description: Select the Training Access role to access all the required trainings for Agent/Broker role assignment. After successful completion of all the trainings Agent/Broker role will be granted.

Next

3 Complete Identity Verification

4 Enter Business Contact Information

5 Enter Reason for Request

New Agents and Brokers

Requesting Application and Role – Step 3

Complete Remote Identity Proofing

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’.

Next

Cancel

New Agents and Brokers Requesting Application and Role – Step

- Complete Business Contact Information
- Social Security Number is required and necessary for National Producer Number (NPN) validation within MLMS

3 Enter Business Contact Information

All fields are required unless marked (optional).

Social Security Number
XXX-XX-7876

Company Name
Health Inc

Address Line 1
123 Main

Enter Address Line 2 (optional)

City
Baltimore

State
Maryland

ZIP Code
21000

Enter ZIP+4 Code (optional)

Company Phone Number
444-444-4444

Enter Extension (optional)

Office Phone Number
444-444-4444

Enter Extension (optional)

Next

4 Enter Reason for Request

Topics for All Users: IDM Self Service Dashboard

- IDM Self Service Dashboard - <https://home.idm.cms.gov>
- The IDM Self Service Dashboard provides access to functions that allow users to manage their user profile, request new applications, and manage roles for applications to which they have been granted access.

The screenshot shows the top navigation bar of the IDM Self Service Dashboard. On the left, it displays 'CMS.gov | IDM Self Service'. On the right, there is a user profile icon with a '0' notification badge and the name 'Jason Jackson' with a dropdown arrow. Below the navigation bar, there are four main dashboard cards arranged in a 2x2 grid:

- My Profile:** Features a person icon with a list. Text: 'My Profile', 'To access your Profile please click here.', and 'You can View or Edit your Profile or MFA on this page.'
- Role Request:** Features a person icon with a plus sign. Text: 'Role Request', 'To request access to a new Application please click here.', and 'You can Add a Role in a new Application on this page.'
- Manage My Roles:** Features a person icon with a list. Text: 'Manage My Roles', 'To access your existing Roles please click here.', and 'You can View, Add, Edit or Remove Roles on this page.'
- My Requests:** Features a person icon with a clock. Text: 'My Requests', 'To access your own Pending requests please click here.', and 'You can View or Cancel your requests on this page.'

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)
Marketplace Service Desk	Phone: 1-855-CMS-1515 Phone: 1-855-267-1515	<ul style="list-style-type: none"> Centers for Medicare & Medicaid Services (CMS) Enterprise Portal password resets and accountlockouts Other CMS Enterprise Portal account issues or error messages General registration and training questions Login issues on the Direct Enrollment agent/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 October–November only: Saturday–Sunday 10:00 AM–3:00 PM ET
Agent/Broker Email Help Desk	Email: FFMProducer-AssisterHelpDesk@cms.hhs.gov	<ul style="list-style-type: none"> General enrollment and compensation questions Manual identity proofing/Experian issues Escalated general registration and training questions Agent/Broker Registration Completion List issues Find Local Help questions Help On Demand participation instructions or questions Report concerns that a consumer or another agent or broker has engaged in fraud or abusive conduct Complex consumer application issues- send description of issue needing resolution and app ID – do not send PII 	Monday–Friday 8:00 AM–6:00 PM ET
Agent/Broker Training and Registration Email Help Desk	Email: 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 Reminders

Be sure to register for the upcoming Marketplace Agent and Broker Office Hours occurring on the following dates:

April 14, 2021
June 17, 2021
August 19, 2021

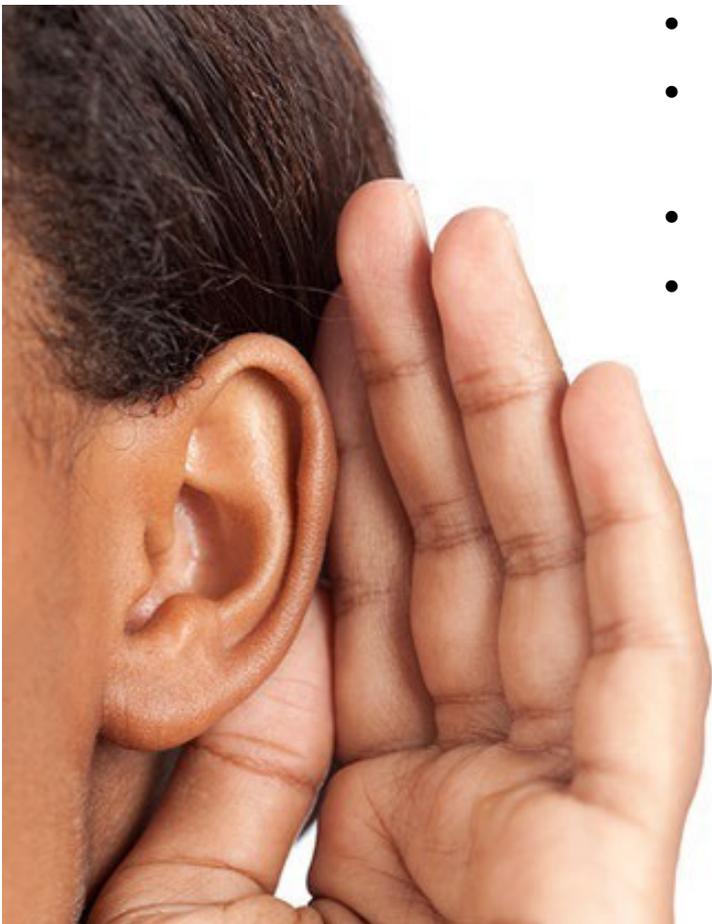


To register, log into REGTAP at <https://www.regtap.info/> and complete the following steps:

1. Select 'Training Events' from 'My Dashboard.'
2. Select the 'View' icon next to event title: Marketplace Agent and Broker Office Hours.
3. Select 'Register Me.'

Note: Once you've completed the above steps you will automatically be registered for ALL 2021 Office Hour sessions.

We're Listening



- Dial **1-866-549-8866** to enter the phone queue
- Enter your webinar access PIN* provided to you in the confirmation email from REGTAP
- Dial star (*) pound (#) to enter the question queue
- You may also enter your feedback in the webinar Q&A panel.

- 🌐 What are you observing from Open Enrollment so far?
- 🌐 What questions do you have?
- 🌐 What should we share with our operations team?

*If you do not have your webinar access PIN, contact the Registrar by calling **(800) 257-9520**.

Webinar Session Survey

- CMS welcomes your feedback regarding this webinar and values any suggestions that will allow us to enhance this experience for you.
- Shortly after this call, we will send a link to you for a convenient way to submit any ideas or suggestions you wish to provide that you believe would be valuable during these sessions.
- Please take time to complete the survey and provide CMS with any feedback.



Closing Remarks

