SMALL BUSINESS HEALTH OPTIONS PROGRAM (SHOP)
Marketplace

SHOP Marketplace Agent & Broker User Guide

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The Small Business Health Options Program (SHOP) Marketplace on HealthCare.gov has an agent/broker portal that allows agents and brokers to manage and help clients with their online application, enrollment, and renewal. To work with the SHOP Marketplace, all agents and brokers must keep an active SHOP Marketplace registration. As an agent/broker, you must complete the SHOP Marketplace Agreement on the Marketplace Learning Management System (MLMS) and an identity verification process on the Centers for Medicare & Medicaid Services' (CMS) Enterprise Portal.

For details on how to complete the SHOP Marketplace registration and training requirements for agents and brokers, visit **CMS.gov/cciio/programs-and-initiatives/health-insurance-marketplaces/a-b-resources.html**.

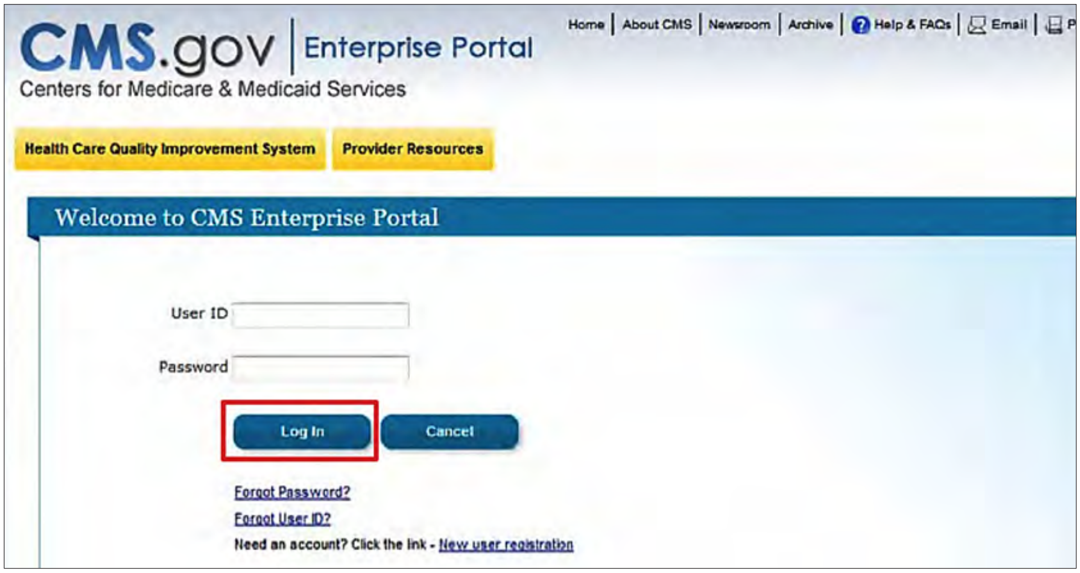
When you complete the SHOP Marketplace registration requirements, you'll need to create a searchable profile on the SHOP Marketplace Agent/Broker Portal to start helping clients in the SHOP Marketplace. Visit **HealthCare.gov/marketplace/small-businesses/agent** to log into the portal with your Marketplace User ID and password.

Help Employers Enroll in the SHOP Marketplace

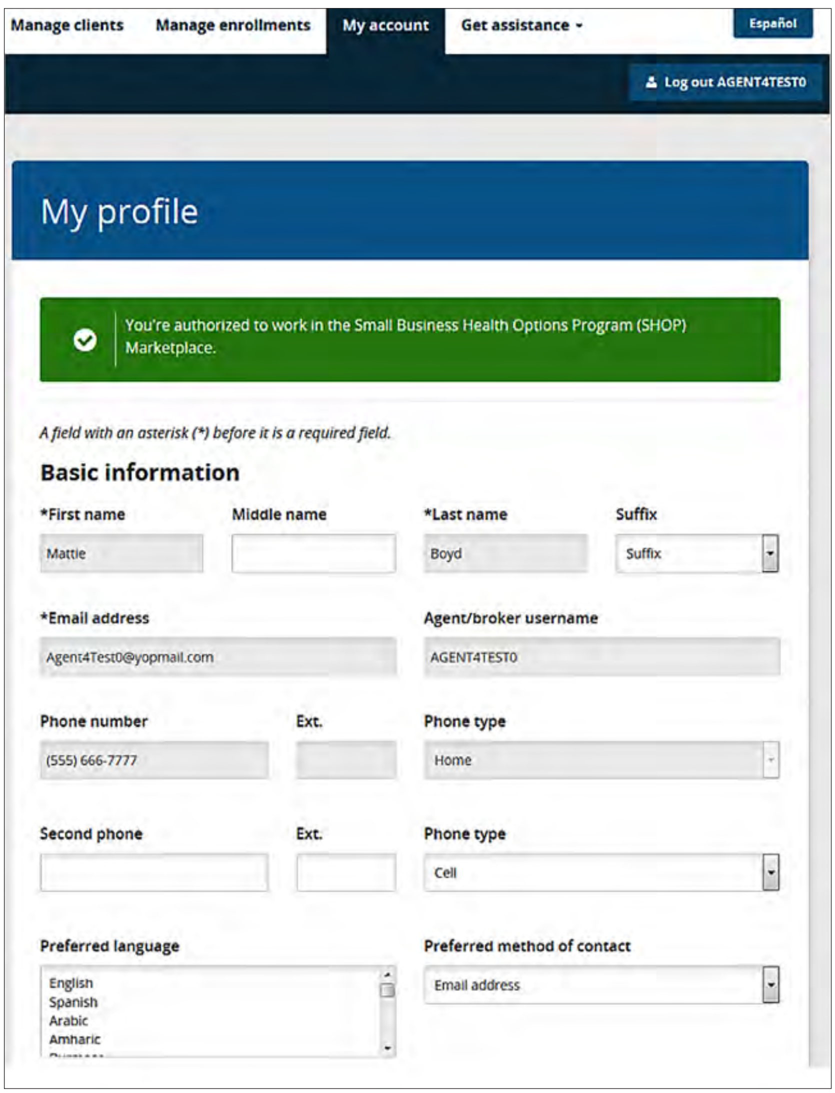
You should follow the same process as employers to complete a SHOP Marketplace application. You can complete the entire application on behalf of the employer and do the same things that an employer can do, except for making payments. Follow the steps below to help employers enroll. For more detailed instructions to help employers enroll, visit **Marketplace.cms.gov/outreach-and-education/enroll-in-shop.pdf**. Remember, employers have to give you authorization before you can help them in the SHOP Marketplace.

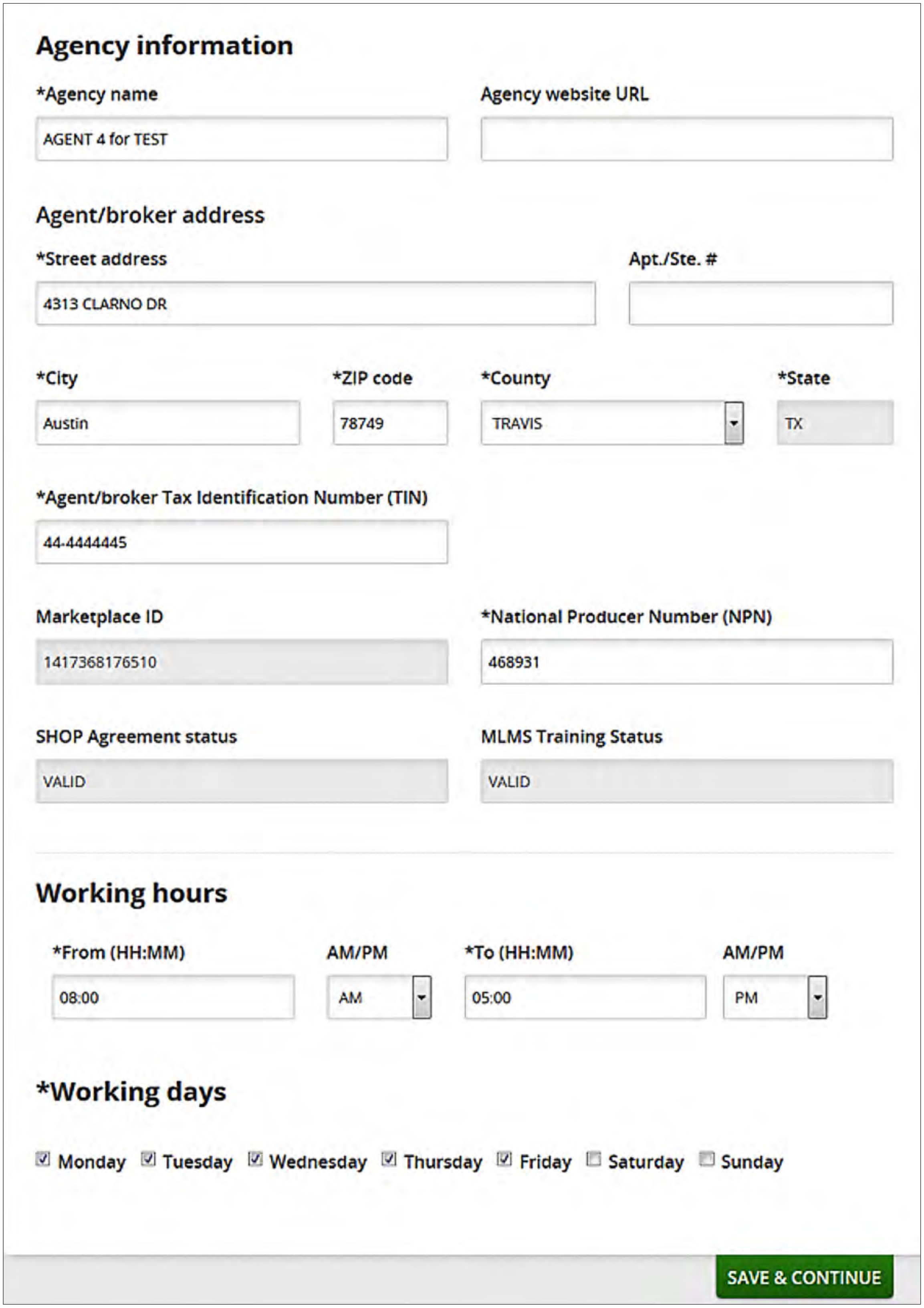
Create a profile on the SHOP Marketplace Agent/Broker Portal

- Log into the SHOP Marketplace Agent/Broker Portal. Visit **HealthCare.gov/marketplace/small-businesses/agent** , and enter your CMS Enterprise Portal User ID and password. Select **LOG IN**.



You must keep an active profile on HealthCare.gov to work with the SHOP Marketplace. On the **My Profile** page, enter basic information about you and your agency. All required fields are marked with an asterisk (*). All employers will be able to access this information.





Agency information

*Agency name: AGENT 4 for TEST

Agency website URL:

Agent/broker address

*Street address: 4313 CLARNO DR

Apt./Ste. #:

*City: Austin

*ZIP code: 78749

*County: TRAVIS

*State: TX

*Agent/broker Tax Identification Number (TIN): 44-4444445

Marketplace ID: 1417368176510

*National Producer Number (NPN): 468931

SHOP Agreement status: VALID

MLMS Training Status: VALID

Working hours

*From (HH:MM): 08:00

AM/PM: AM

*To (HH:MM): 05:00

AM/PM: PM

*Working days

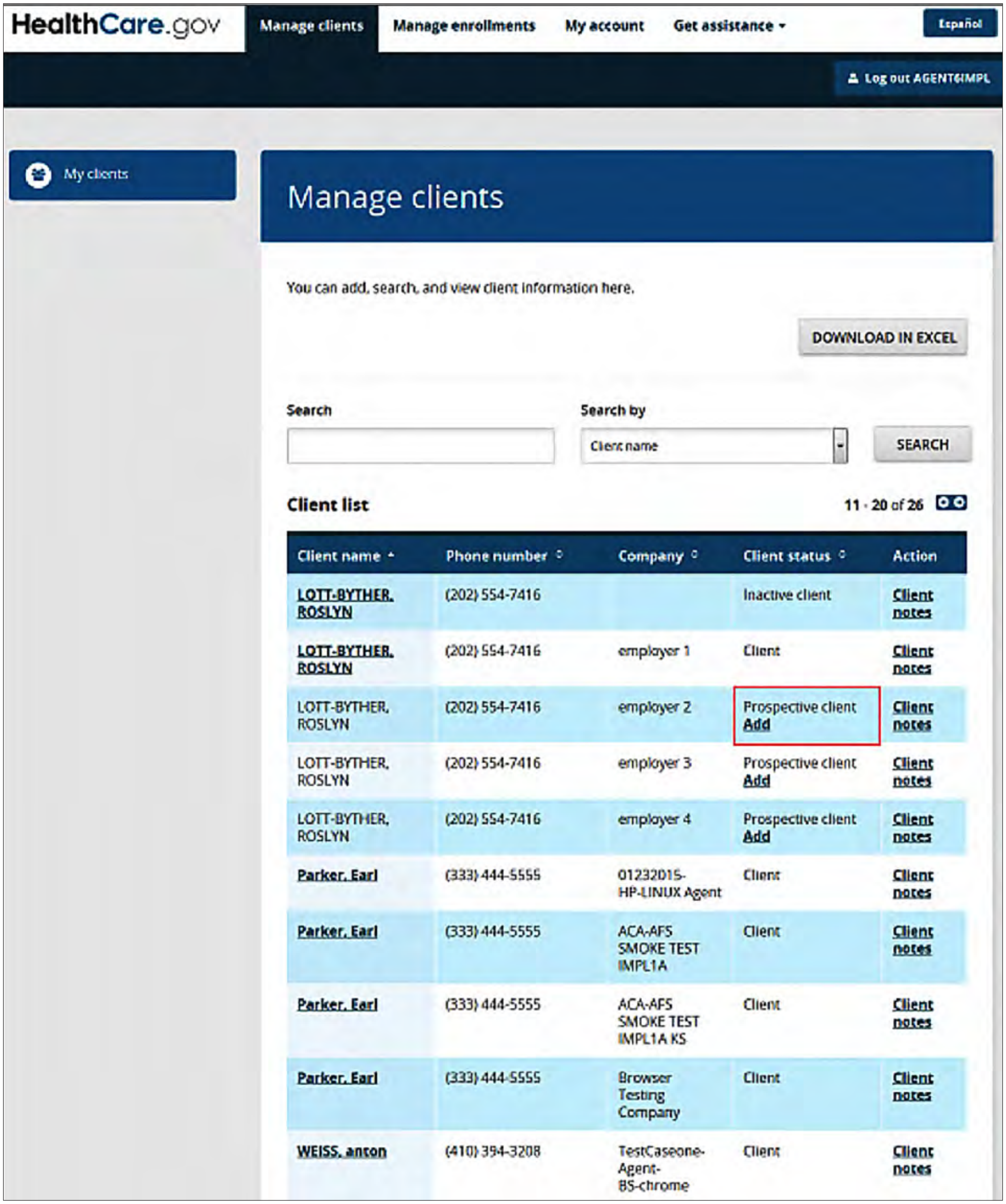
☑ Monday ☑ Tuesday ☑ Wednesday ☑ Thursday ☑ Friday ☐ Saturday ☐ Sunday

SAVE & CONTINUE

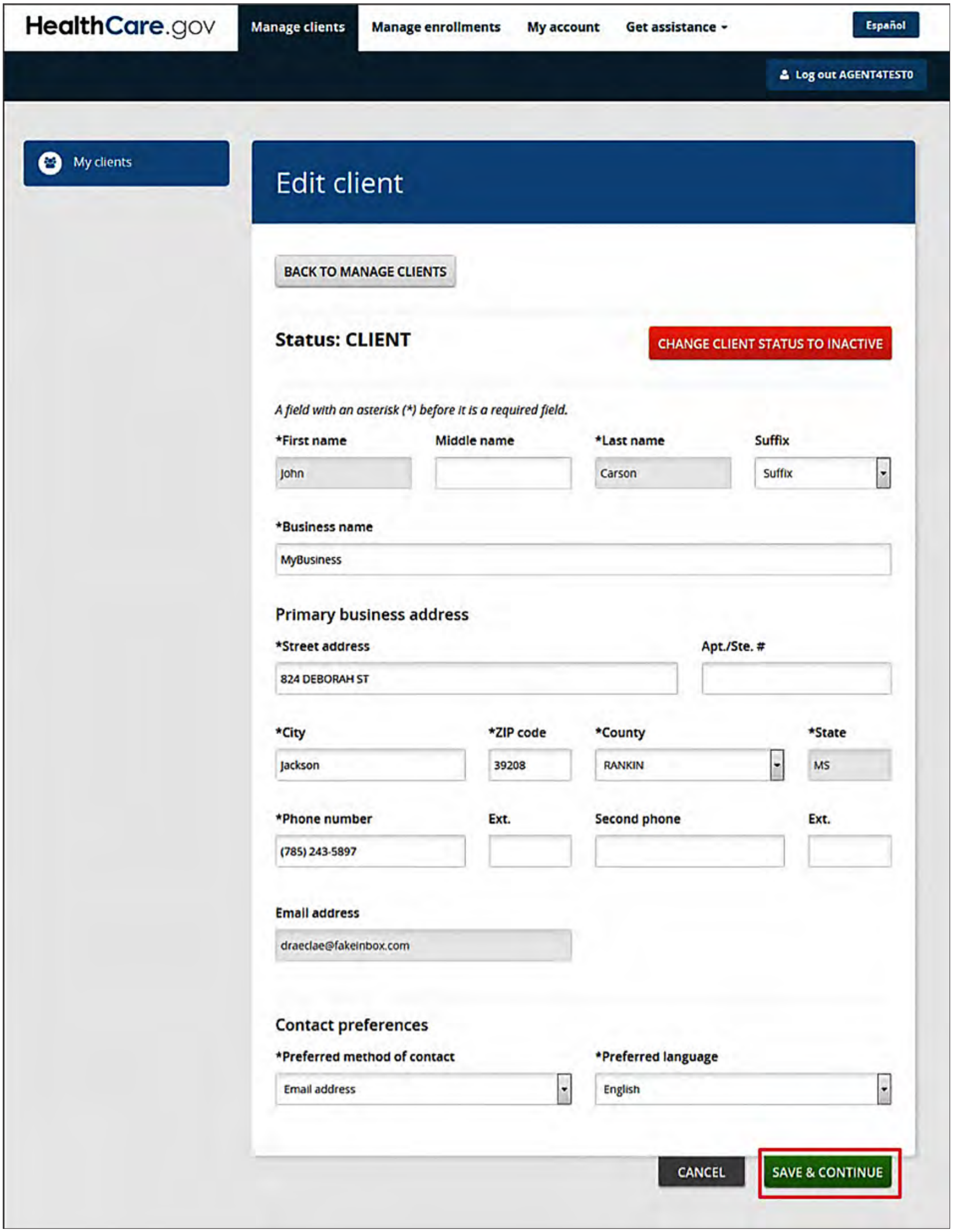
Add a client

You can add clients only after the employer requests an authorization. To add an employer:

- Select the **Manage clients** tab. On the **My clients** page you'll see a list of your clients.
- Select **Add** under the **Client status** field. The client's status should be **Prospective client**.
- On the **Edit client** page you'll see the employer details.
- Select **Add** to enter an employer. On the **My clients** page, the client's status will change from **Prospective client** to **Client.**



Client name	Phone number	Company	Client status	Action
LOTT-BYTHER, ROSLYN	(202) 554-7416		Inactive client	Client notes
LOTT-BYTHER, ROSLYN	(202) 554-7416	employer 1	Client	Client notes
LOTT-BYTHER, ROSLYN	(202) 554-7416	employer 2	Prospective client Add	Client notes
LOTT-BYTHER, ROSLYN	(202) 554-7416	employer 3	Prospective client Add	Client notes
LOTT-BYTHER, ROSLYN	(202) 554-7416	employer 4	Prospective client Add	Client notes
Parker, Earl	(333) 444-5555	01232015-HP-LINUX Agent	Client	Client notes
Parker, Earl	(333) 444-5555	ACA-AFS SMOKE TEST IMPL1A	Client	Client notes
Parker, Earl	(333) 444-5555	ACA-AFS SMOKE TEST IMPL1A KS	Client	Client notes
Parker, Earl	(333) 444-5555	Browser Testing Company	Client	Client notes
WEISS, anton	(410) 394-3208	TestCaseone-Agent-BS-chrome	Client	Client notes


HealthCare.gov
Manage clients
Manage enrollments
My account
Get assistance
Español
Log out AGENT4TEST0
My clients
Edit client
BACK TO MANAGE CLIENTS
Status: CLIENT
CHANGE CLIENT STATUS TO INACTIVE
A field with an asterisk (*) before it is a required field.
*First name
Middle name
*Last name
Suffix
John
Carson
Suffix
*Business name
MyBusiness
Primary business address
*Street address
Apt./Ste. #
824 DEBORAH ST
*City
*ZIP code
*County
*State
Jackson
39208
RANKIN
MS
*Phone number
Ext.
Second phone
Ext.
(785) 243-5897
Email address
draeclae@fakeinbox.com
Contact preferences
*Preferred method of contact
*Preferred language
Email address
English
CANCEL
SAVE & CONTINUE

Review client list

In the SHOP Marketplace Agent/Broker Portal, you'll see a list of your existing clients. When you have authorization from an employer, you can make edits to a specific employer's information and sort by client name, phone number, company name, client type, or client status. You can also add client notes to an employer's account.

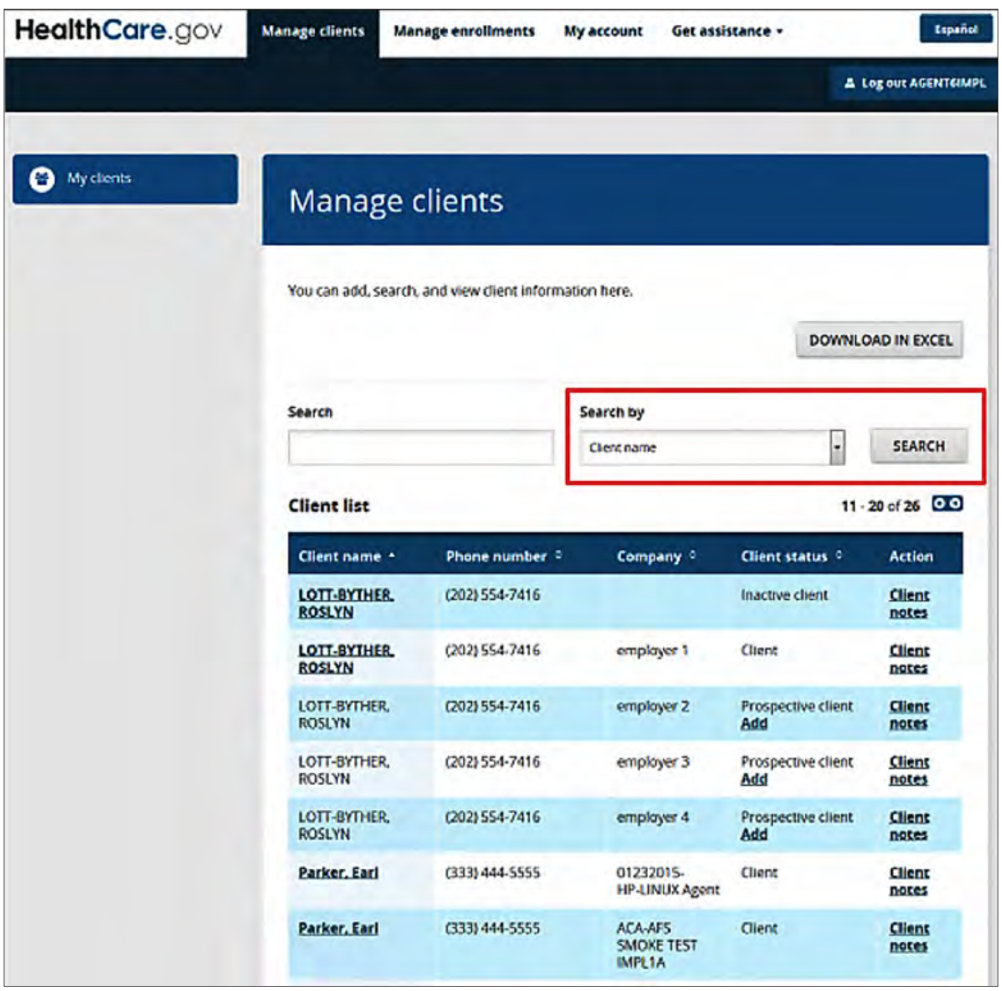
Employers can authorize an agent or broker by selecting the **Get assistance** tab and searching for a list of agents and brokers registered to work with the SHOP Marketplace by location, name, or National Producer Number (if available).

To review your list of clients, select the **Manage clients** tab. On the **Manage clients** screen, select the drop down menu under the **Employer** tab.

Select one of these search criteria from the drop down menu:

- Client name
- Phone number
- Company
- Client status

Select **Search**. You'll see the employer's information in the search results. If the employer isn't found, you'll see an error message. You can select other search criteria from the drop down menu to try again.

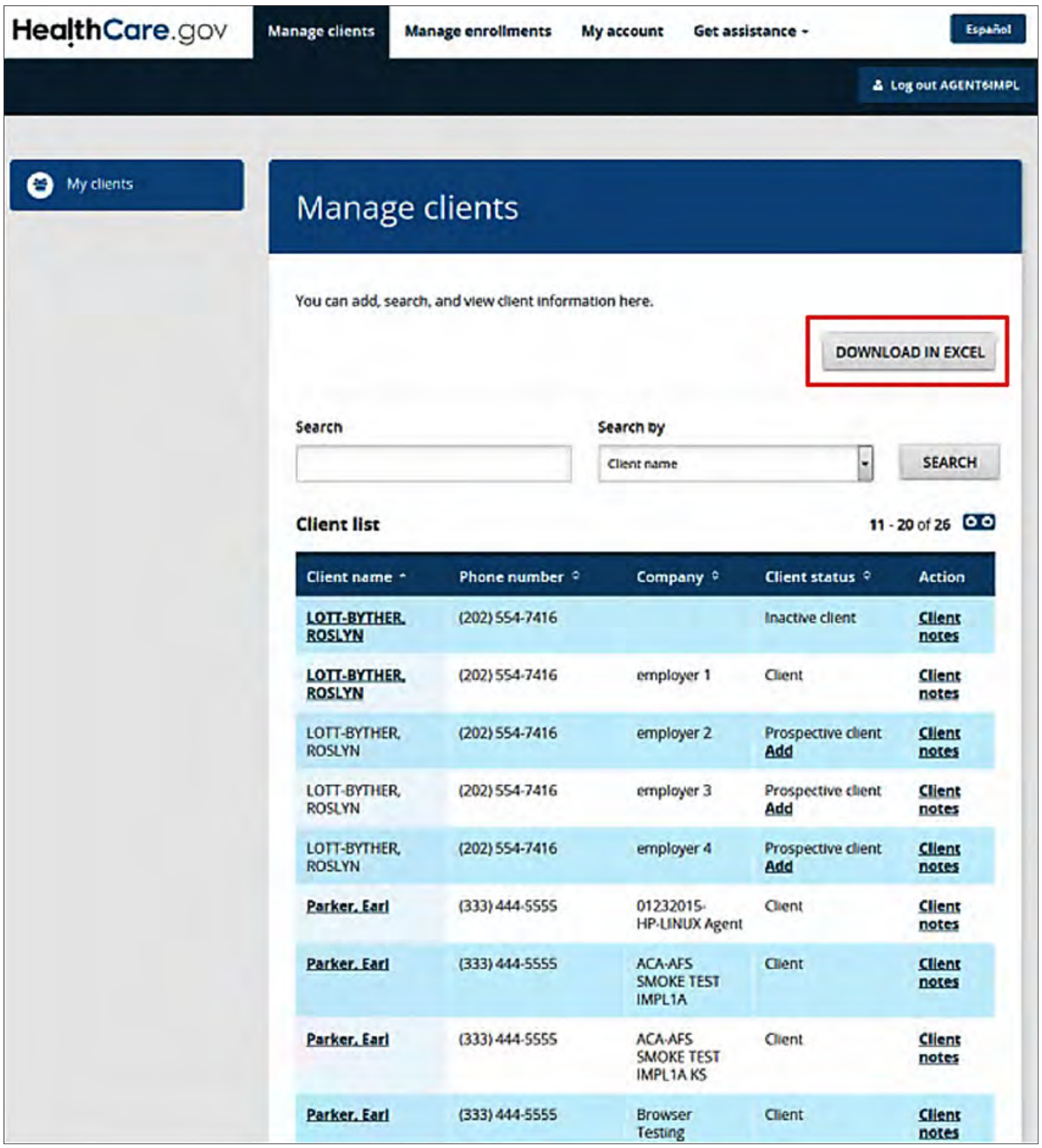


Download a client list

On the **Manage clients** page, you can view a list of your authorized clients. You have to get an authorization from an employer before they can become a client. Once an authorization is requested by an employer, you can log into your account to accept or decline the pending authorization. If you accept the pending authorization, that employer will appear on your client list. You can download a list of existing clients in Microsoft (MS) Excel .xls format. To download a list of clients:

- Select the **Manage clients** tab. On the **My clients** page, you'll see a list of your clients.
- Select **DOWNLOAD IN EXCEL**. Choose the file you want and confirm.
- After the file downloads, you can save it to your computer.

Note: The 1997-2003 Excel templates are available to download on the employee roster page. Only the 1997-2003 MS Excel file can be uploaded. You'll get an error message if the file isn't in the right format.



Create a Proposal

You can create a proposal for your client to review through the SHOP Marketplace Agent/Broker Portal. If the employer gives you authorization, you can use the proposal to create an enrollment for your client.

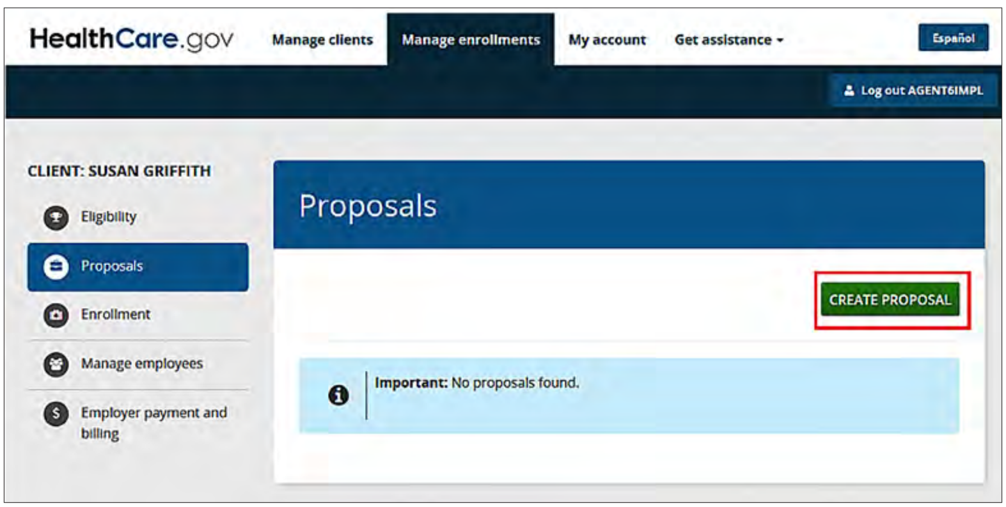
To create a proposal:

- Select **Proposals** under the **Manage Enrollments** tab.
- Select **Create Proposal**.

The steps you'll take to create a proposal are the same steps you would take to create an enrollment. For more information on the enrollment application, visit **marketplace.cms.gov/outreach-and-education/shop-employer-enrollment-user-guide-2016.pdf**. You can also watch the SHOP Marketplace **enrollment video** for employers at **YouTube.com/watch?v=zz3wZY3VJmQ**.

Once the proposal is created, save it and send it to your client for review and approval.

NOTE: If your client reviews the proposal and wants to make any changes, you'll have to create a new proposal.

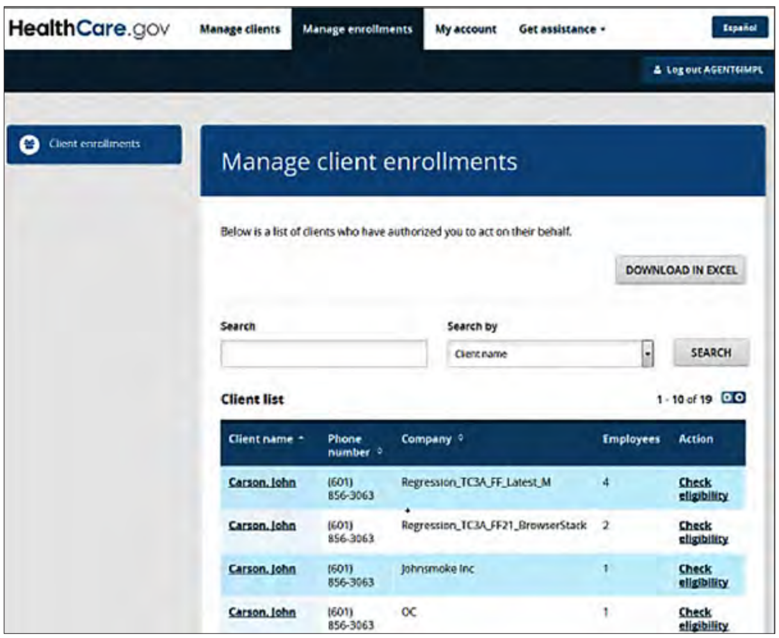


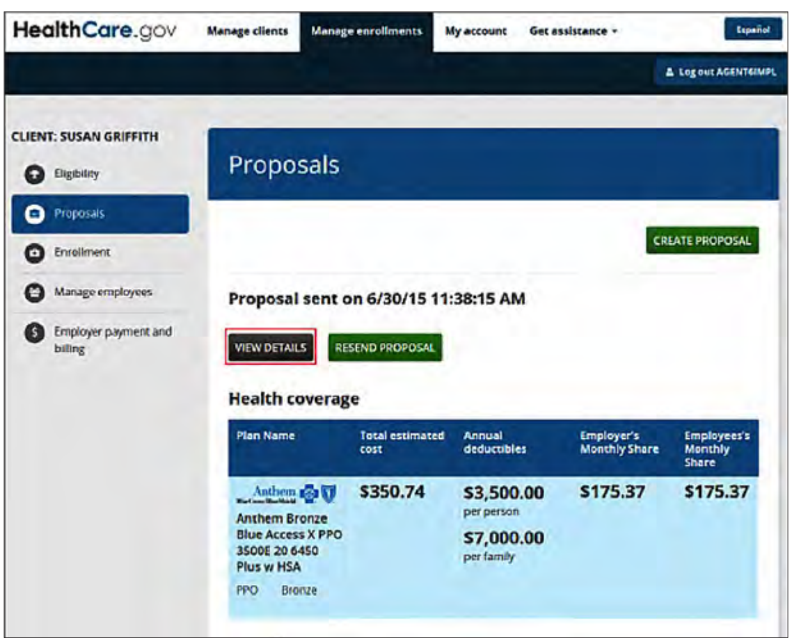
Create an Enrollment

You can help with the enrollment process after you've accepted the employer's pending authorization to become your client. The employer must take the first step to request authorization. Once the employer gives authorization, you can create an enrollment proposal or finish the employer's enrollment application that's already started. **Remember, you can only create an enrollment for an employer if the employer gives you authorization**.

To create an enrollment from a saved proposal:

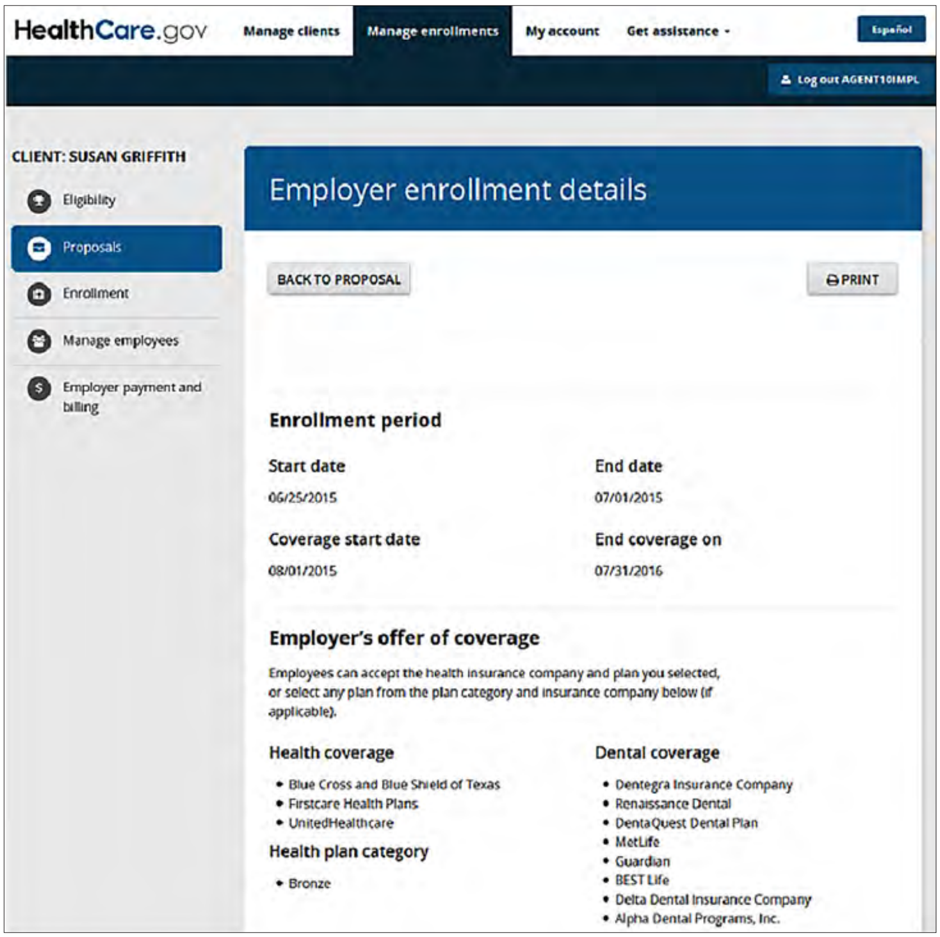
- Select the **Manage enrollments** tab. On the **Client enrollments** page, you'll see a list of your clients.
- Select **Check eligibility** under the **Action** field of the client list for a specific employer.
- On the **Proposals** page, you'll see the saved proposals for the selected employer.
- Select the **VIEW DETAILS** button on the **Proposals** screen to see the **Employer Enrollment Details** page.





Create an Enrollment (continued)

- Select **CREATE ENROLLMENT** on the **Employer Enrollment Details** page to confirm your selection and return back to the **Client enrollment** page.



Coverage selected for employees

Important: It's your responsibility to ensure that all your employees get information about how to enroll in a health plan through SHOP.

Health coverage

Insurance Carrier	Total estimated cost	Annual deductibles	Estimated employer contribution	Estimated employee contribution
BEST Life BEST Life and Health Insurance Company **BEST Dental Choice-L** PPO LOW coverage category	**$23.74**	Not applicable per person Not applicable per family	**$11.87**	**$11.87**

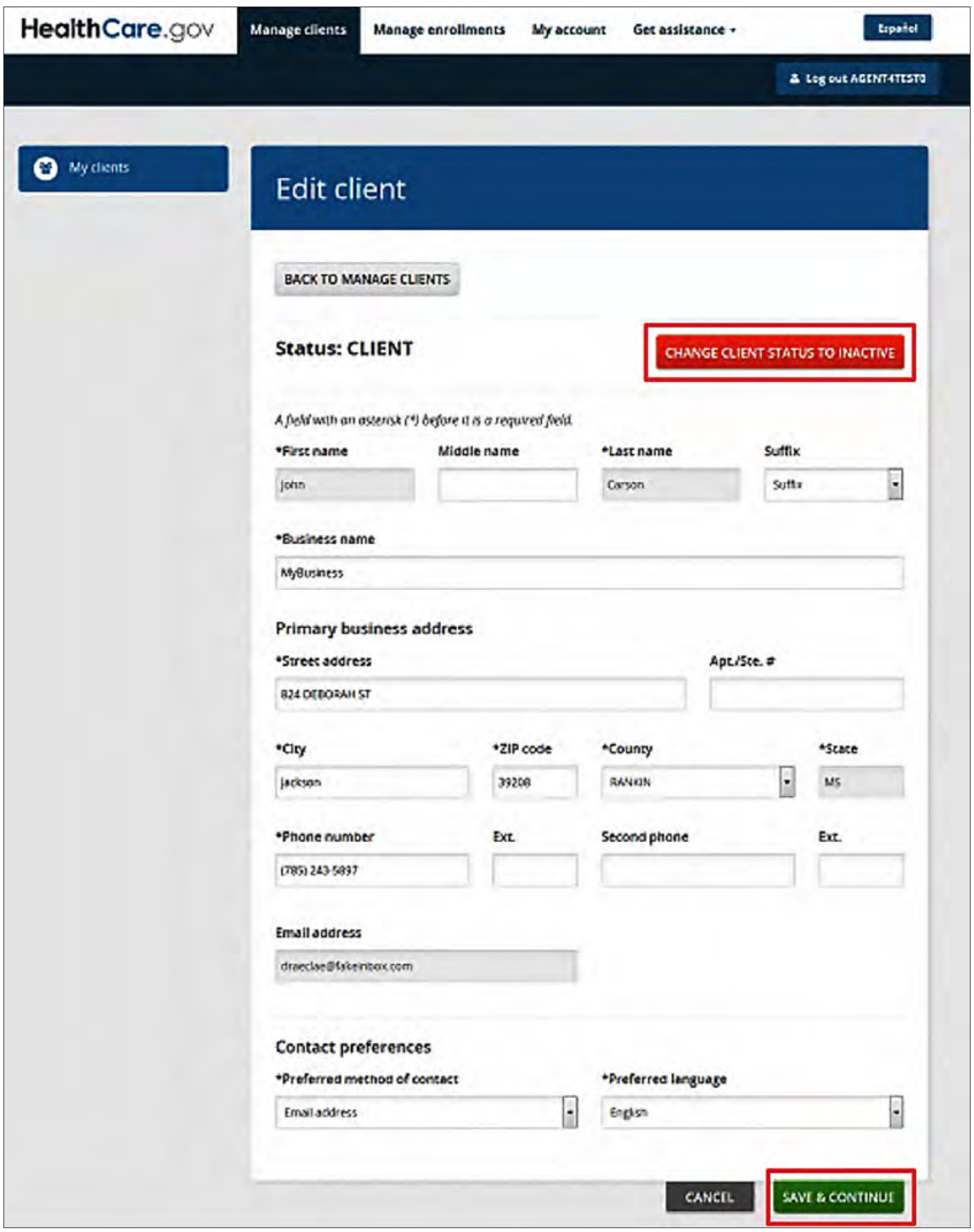
CREATE ENROLLMENT

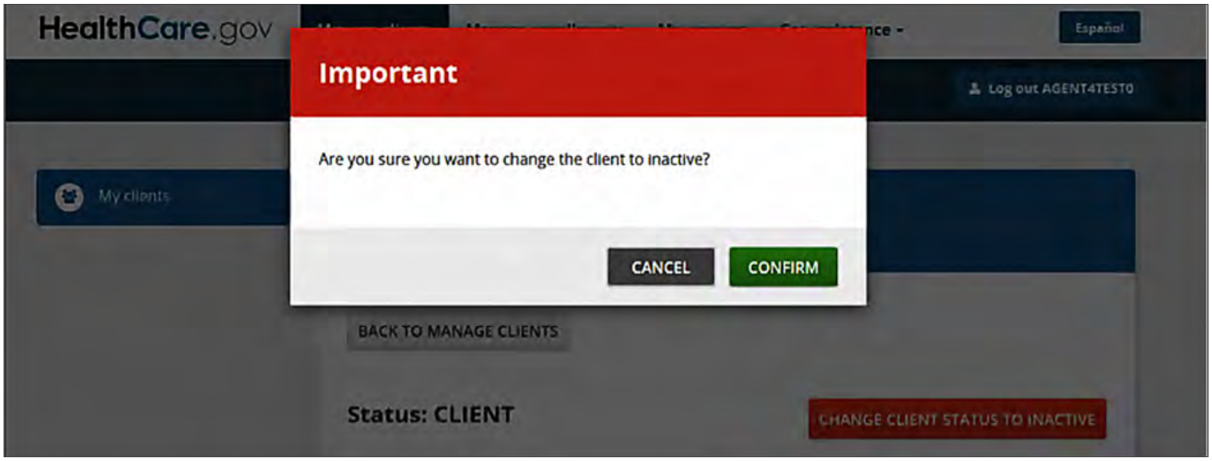
Change an Employer's Authorization Status

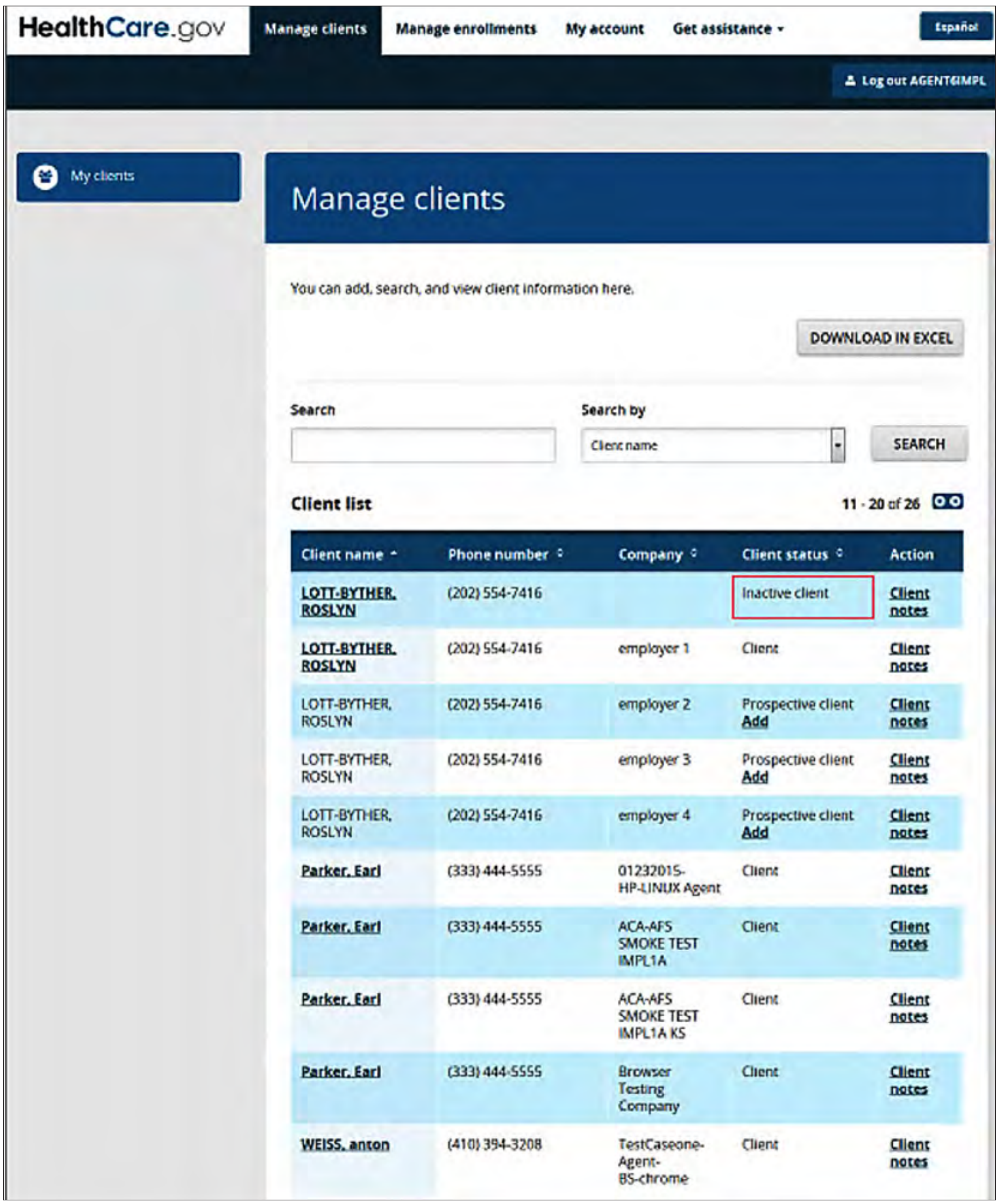
If an employer's authorization status is **INACTIVE**, you can update it to **ACTIVE.** If an employer decides not to use your services, the employer's status will automatically update to **INACTIVE**.

To change an employer's authorization status:

- Select the **Manage clients** tab. On the **My clients** page, you'll see a list of your clients.
- Select the employer's name under the **Client name** field. On the **Edit client** page, you'll see employer details.
- Select **CHANGE CLIENT STATUS TO INACTIVE**. You'll get a confirmation that the employer's status has changed.
- Select **SAVE & CONTINUE** to see the updates.




HealthCare.gov
Español
Important
Log out AGENT4TEST0
My clients
Are you sure you want to change the client to inactive?
CANCEL
CONFIRM
BACK TO MANAGE CLIENTS
Status: CLIENT
CHANGE CLIENT STATUS TO INACTIVE

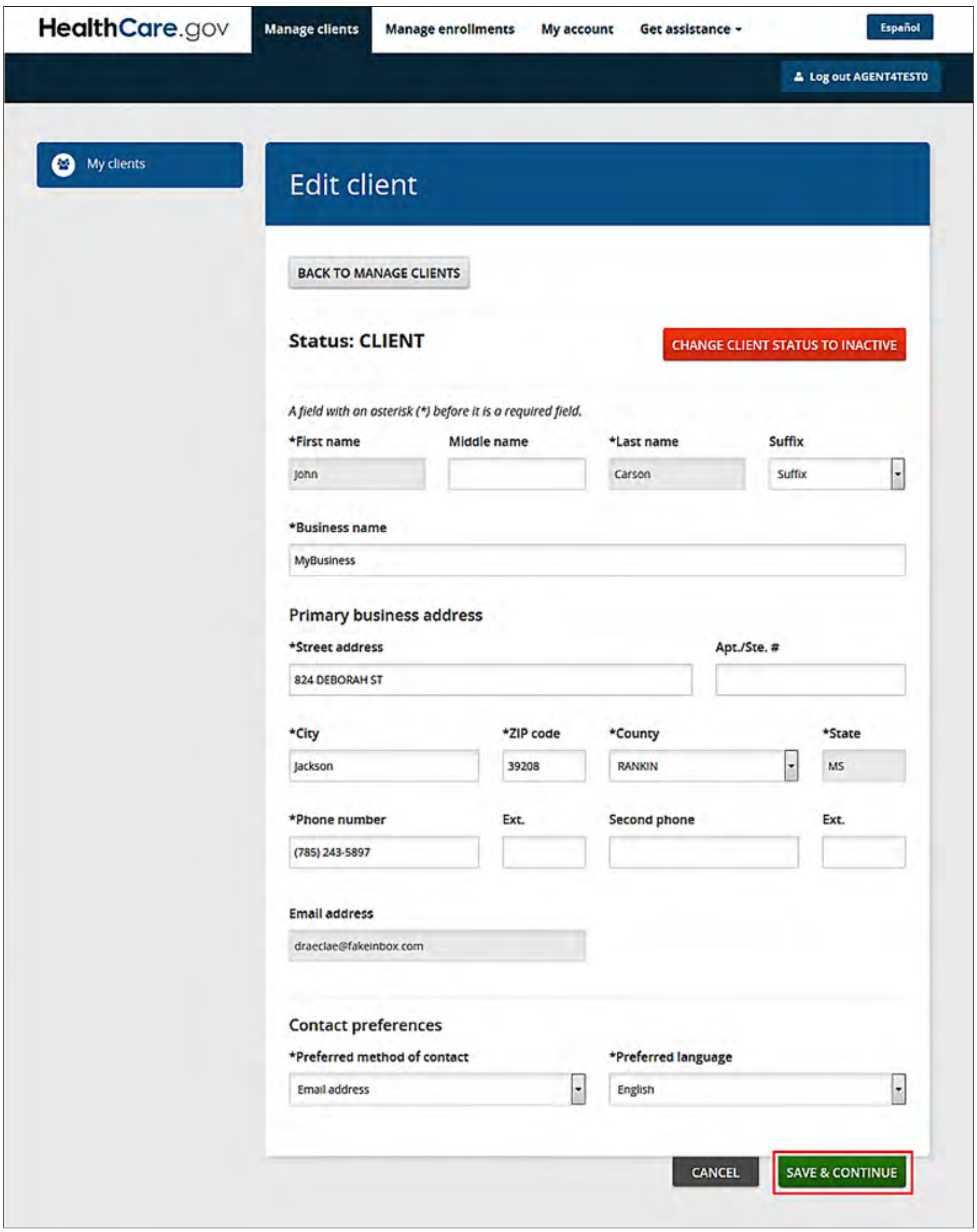

HealthCare.gov
Manage clients
Manage enrollments
My account
Get assistance
Español
Log out AGENT6IMPL
My clients
Manage clients
You can add, search, and view client information here.
DOWNLOAD IN EXCEL
Search
Search by
Client name
SEARCH
Client list
11 - 20 of 26
Client name
Phone number
Company
Client status
Action
LOTT-BYTHER, ROSLYN (202) 554-7416 Inactive client Client notes
LOTT-BYTHER, ROSLYN (202) 554-7416 employer 1 Client Client notes
LOTT-BYTHER, ROSLYN (202) 554-7416 employer 2 Prospective client Add Client notes
LOTT-BYTHER, ROSLYN (202) 554-7416 employer 3 Prospective client Add Client notes
LOTT-BYTHER, ROSLYN (202) 554-7416 employer 4 Prospective client Add Client notes
Parker, Earl (333) 444-5555 01232015-HP-LINUX Agent Client Client notes
Parker, Earl (333) 444-5555 ACA-AFS SMOKE TEST IMPL1A Client Client notes
Parker, Earl (333) 444-5555 ACA-AFS SMOKE TEST IMPL1A KS Client Client notes
Parker, Earl (333) 444-5555 Browser Testing Company Client Client notes
WEISS, anton (410) 394-3208 TestCaseone-Agent-BS-chrome Client Client notes

Edit an Employer's Information

You can edit an employer's information once you've added the employer as a client. **Remember, an employer must authorize you before you can help them in the SHOP Marketplace.**

To edit an employer's information:

- Select the **Manage clients** tab. On the **My clients** page, you'll see a list of your clients.
- Select the employer's name under the **Client name** field. On **Edit client** page, you'll see employer details.
- Select **SAVE & CONTINUE** to confirm the changes.

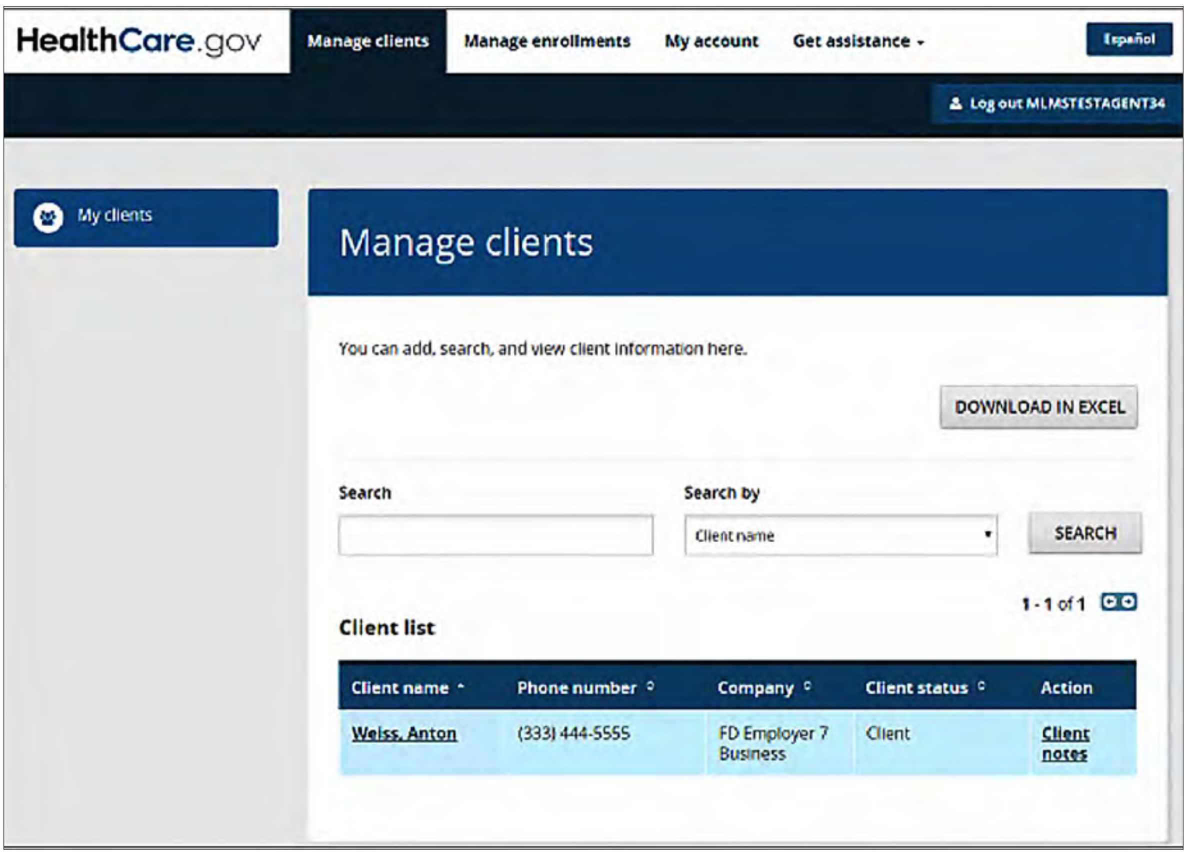


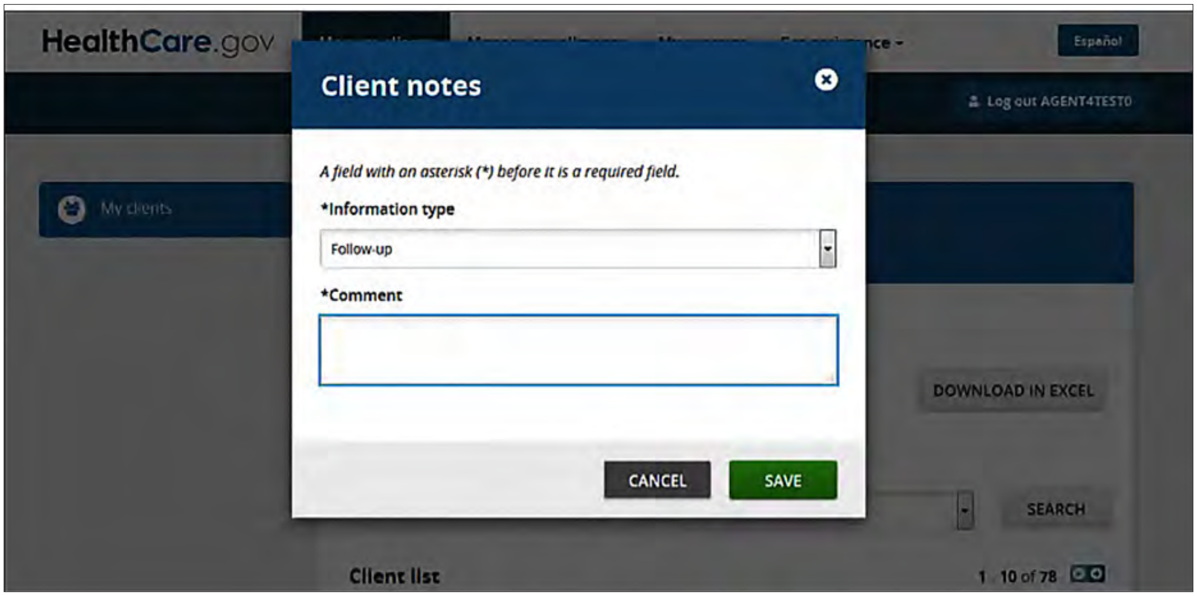
Add Client Notes

You can add client notes for any employer that you're working with. To add client notes:

- Select the **Manage clients** tab to see a list of your clients.
- Select **Client notes** in the **Client list** under the **Action** field to view the **Client notes** dialog box.
- Select the type of notes to be entered from the **Information type** drop down menu.
- Enter your comments in the **Comments** box, and select **SAVE**.

You can follow this same process to review your notes. You'll see saved comments in the **Comments** text box.




HealthCare.gov
Español
Client notes
Log out AGENT4TEST0
My clients
A field with an asterisk (*) before it is a required field.
*Information type
Follow-up
*Comment
DOWNLOAD IN EXCEL
CANCEL
SAVE
SEARCH
Client list
1 - 10 of 78

Have Questions or Need Help?

For more information on the SHOP Marketplace, visit HealthCare.gov/small-businesses. You can also contact the SHOP Call Center at 1-800-706-7893, Monday – Friday, 9 a.m. – 7 p.m. (ET). TTY users should call 711 to reach a call center representative.

If you have questions about the Health Insurance Marketplace for individuals and families, contact the Marketplace Call Center at 1-800-318-2596. TTY users should call 1-855-889-4325.

DEPARTMENT OF HEALTH & HUMAN SERVICES · USA

SHOP Marketplace

Health Insurance for Small Businesses

CMS Product No . 11880
Revised January 2016