

Appendix B: Agent/Broker Data Elements Required for Access to CMS Training Learning Management System, Training Curriculum Outline, and Sample Exam Question

1. Data Elements Required for Access to CMS Training Learning Management System (LMS)

Agent/Broker LMS Registrant Information
Personal Identifying Information <ul style="list-style-type: none"> • First name, Last name
Contact Information <ul style="list-style-type: none"> • Email address • Business address • Telephone number
Professional Information <ul style="list-style-type: none"> • Title/Position • Health Care Provider or Facility Type (pull-down menu)
Market Type Selection <ul style="list-style-type: none"> • Individual and/or small business health options program (SHOP) market

2. Training Curriculum Outline

Content for Agent/Broker training with the FFE has been grouped into the following four courses (working titles¹):

- **FFE and ACA Basics** (core course for all target audiences)
- **Individual Market** (for Agents, Brokers, and Web Brokers)
- **SHOP Market** (for Agents and Brokers only)
- **API Access to the Exchange²** (core course for API users including web brokers)

Course: FFE and ACA Basics

Module/Topic	Estimated Duration (minutes)
Module 1: Introduction	3
Module 2: Operating in the Exchange Marketplace	4
Module 3: Overview of Individual and SHOP Markets	8

¹ At this juncture, titles are purposely short with acronyms left as-is for CCIIO approval.

² Accessing the Exchange is currently expected to be the final course participants would launch and may only become viewable, along with Individual Market and SHOP, once a participant completes Basics.

Module/Topic	Estimated Duration (minutes)
Module 4: Overview of Affordability Programs	15
Module 5: The Four Levels of Coverage: Metals	5
Module 6: Allowable Premium Variations	3
Module 7: Eligibility and Enrollment	10
Module 8: Privacy Standards and Issues	15
Module 9: Tools and Technical Assistance	5
Total Minutes	68

Course: Individual Market

Module/Topic	Estimated Duration (minutes)
Module 10: Introduction	1
Module 11: Individual Market Reforms	5
Module 12: Eligibility for State Medicaid, CHIP and Basic Health Programs	15
Module 13: Eligibility for QHPs, the Advance Premium Tax Credits (APTC) and Cost-Sharing Reductions (CSR)	15
Module 14: The Application Process	5
Module 15: The Enrollment Process	5
Module 16: Privacy Issues for the Individual Market	5
Total Minutes	51

Course: SHOP Market

Module/Topic	Estimated Duration (minutes)
Module 17: Introduction	1

Module/Topic	Estimated Duration (minutes)
Module 18: SHOP Market Reforms	5
Module 19: The SHOP Purchasing Experience	20
Module 20: Small Business Tax Credit and Employer Responsibility Penalties	10
Module 21: Privacy Issues for the SHOP Market	5
Module 22: SHOP Broker Tools	10
Module 23: Annual Renewal Information	5
Total Minutes	56

Course: API Access to the Exchange

Module/Topic	Estimated Duration (minutes)
Module 24: Introduction	1
Module 25: Navigating the API	20
Module 26: Enrollment in a Quality Health Plan (QHP)	10
Module 27: Requirements that Apply to Agents/Brokers Accessing the API	20
Total Minutes	51

3. Sample Exam Question

Module 7: Eligibility and Enrollment

A 66 year old woman with an income equal to 200% of the poverty level meets with you. She also has \$25,000 in assets in the bank. She wants to know if she is eligible for any premium or cost sharing assistance:

- 1) No, because her income is too high
- 2) No, because her assets are too high
- 3) She might be, but it depends on which level of coverage she selects (bronze, silver, gold, or platinum)
- 4) No because she is over the maximum age requirement.