MNsure

Where you choose health coverage

2015-2016 Agency Notice of Intent Registration and Agent/Broker Certification

Contents

Agency Registration and Certification

The MNsure registration portal is a secure, self-service site for agencies to begin the certification process and register intent to partner with MNsure. Agency registration is the first step for agents/brokers within the agency to complete the certification process and sell policies available through the MNsure Marketplace. All agencies, agents and brokers, are required to complete the necessary steps in the registration portal to become certified.

Once the agency registration is completed, the designated Account Administrator will enter agents/brokers into the agency roster to begin tracking required coursework completion for each agent/broker seeking certification.

The roster information entered for each agent/broker will be used to create a contact record in our online directory listing once certification requirements are complete. MNsure collects name, license number and agency information to publish to the online directory. During certification, the data collected in an application is private except the agent's name. Once a decision is made as to certification, data in the application and the MNsure determination are public pursuant to Minnesota Statutes, section 62V.06, subd. 4. You are not legally required to provide this information, but failure to do so may result in your inability to be certified as a MNsure assister.

Agency Registration

The Primary Contact will register the agency in the MNsure online registration portal. A contact person must be designated for each role below.

Please note: It is possible for all of these roles to be filled by one person. If all of the roles are filled by the same person, check the box below the "Primary Contact" entry fields.

The definitions of each role can be found in the Glossary at the end of this guide.

- Agency Roles
  - Primary Contact
  - Contract Manager
  - HIPAA contact
  - Signature Authority
  - Payment Coordinator

Click the submit button once all of the required fields are entered.

On the next screen, you will be prompted to enter:

- Account administrator contact information—enter in the required fields.

Agency Registration Steps

1. Visit Broker One Stop.

2. Click on “Register Your Agency” button.
3. You will now be directed to the registration portal to enter information into the required fields.
4. Once completed, click on the “submit” button.
5. An email with confirmation of successful registration will be sent to the Primary Contact listed.
6. On the next screen, enter in the designated Account Administrator. Click “submit.”
7. You will then enter in Account Administrator First Name, Last Name, email address and phone number.
8. An email will be sent to the email address entered for the Account Administrator with a link to change the password. This can only be used once and must be used within 2 hours.
9. Follow the directions sent in the email, you will be directed to a log in screen where the password change will be entered.
10. You will then be prompted to log in with the change just made with the Account Administrator email and newly created password to log in to the agency registration account. **Once logged in for the first time, the screen will display “no records found” until you click on the “add broker” tab to enter agent/broker information. Instructions on how to enter a new agent/broker are below.**
11. Agency registration is complete.

Agency Roster—Enter a New Agent/Broker

Once the agency has received confirmation of registration, the designated Account Administrator will enter agents/brokers interested in becoming certified with MNsure in the agency roster. Required information entered by the Account Administrator will track the certification training progress of each of the registered agents/brokers listed in the agency roster. Certification begins on September 8, 2015 and will remain open throughout the year so agents/brokers may complete the certification requirements at their own pace.

Please note: Certification requirements must be met prior to assisting consumers with plans available on the MNsure Marketplace. Agents/brokers may not assist consumers until certification is confirmed and will not receive compensation from a carrier if a consumer was assisted and enrolled in a plan prior to meeting all certification requirements.

What You Will Need to Begin

Prior to entering the agency roster in the agency registration form please gather the following information for all agents in your agency who would like to become certified to sell plans available through the MNsure Marketplace.

Please note: It is only necessary to list those agents in your agency that are seeking certification to sell plans available through MNsure.

The following information is required for each agent/broker

- Last Name
- First Name
- Mailing Address
- Directory Address
- Broker Phone Number
- County
- Email Address
- Market served (small group, individual, or both)
- National Producer Number
- MN Broker License Number
- Language(s) spoken (must be fluent)
- Taking New Clients? Check the box for "yes," uncheck for "no."

  If the box is unchecked and the agent/broker completes all of the certification requirements, the agent/broker will be certified but not listed in the public directory on MNsure's website. This can be changed at a later date if the agent/broker would like to appear in the directory listing and accept new clients. The designated Account Administrator can make this change by logging back into the registration and certification tracking portal to make the change.
- Status—choose active or inactive from drop-down box
  - **Please note:** If "inactive" is chosen broker will not be considered certified even if all of the certification requirements have been met. Please list active agents only.

Agent/Broker Roster Entry Steps

1. To enter agents/brokers seeking MNsure certification within the agency click on the "Manage Your Roster" link. You will be prompted to log in**. Please note: If you have not yet added any agents/brokers to the agency roster the message "no records found" will display.**
2. Click on the "add broker" tab.
3. On the next screen, you will be asked to accept the terms of the MNsure Individual Certification Agreement for each agent/broker seeking certification prior to proceeding to the next page to enter in the information.
   a. If terms are accepted, the page will move on to the broker information screen.

   b. If the agent/broker does not agree to the terms, the process will not continue. You will have another opportunity to accept the terms for the process to continue.

4. Enter agent/broker information into the required fields.
5. An email will be sent to all agents/brokers entered in the Roster to confirm acceptance of the MNsure Individual Certification Agreement and the Notice of Monitored Broker Performance documents.
   a. If the agent/broker is entered into the Roster and has received the confirmation email but no longer agrees to the terms of the agreement documents, you may click on the "details" link for the Agent/Broker listed in "my brokers" and select "inactive." This will stop the process of certification. This may be changed at a later date by logging into the registration portal and selecting "active." The agent/broker may then continue the certification process.
6. Registration is complete once all agents and brokers interested in seeking certification are entered. A list view of brokers will show by clicking on the main tab labeled "Broker Self Service."

Broker/Agent Certification Tracking

Once the Roster information is complete, you will begin tracking the certification progress of each of the agents/brokers interested in completing the certification process. MNsure approved CE providers begin offering 2015/2016 certification coursework on September 8, 2015. The list of approved MNsure CE providers is located on Broker One Stop.

How to Enter 2015 CE Provider Coursework Completion

1. Visit Broker One Stop.
2. Click on "Manage Your Roster" button.
3. Designated Account Administrator will log in with email and password.
4. Click on "add training" tab.
5. Use the drop-down box to select the agent/broker for whom you would like to enter training. **Please note: If agents/brokers have not yet been entered into the Roster, the drop-down box will be empty. Click on the "add broker" tab to enter in the required information for name to show in the drop-down box.**
6. Enter in the required fields.
7. Hit Submit.
8. If you would like to enter additional training repeat steps 6-8.

To review successful training entry information click on "view training" tab and the list will populate. You can click in each one to see the full information or make updates.

Broker/Agent Certification

MNsure certification begins on September 8, 2015. The requirements and a list of approved MNsure CE providers are located on Broker One Stop.

All brokers/agents that would like to sell plans available through the MNsure Marketplace must complete the following:

1. Agree to the MNsure Individual Certification Agreement and the Notice of Monitored Broker Performance documents. This step is completed in the initial agency registration process.
2. Complete the MNsure Broker Certification Training-2015 course through a MNsure approved CE provider.
3. Complete the annual Data Privacy and Security Standards course through MNsure.
    a. An email with a link and a unique ID will be sent to the primary email address entered in the agency Roster.

Please note: *The email is sent once successful completion of the MNsure Broker Certification Training-2015 course is entered by the Account Administrator into the registration and training tracking portal.* ***If this step isn't completed, the automated email with instructions will not be sent. Agents/brokers are not considered certified until the Data Privacy and Security course is successfully completed.*** *The Data Privacy and Security course is offered at no cost and 1 CE credit will be awarded upon successful completion.*

Once MNsure has received the attested agreement to the MNsure Individual Certification Agreement and the Notice of Monitored Broker Performance documents, MNsure certification course completion and entry into the registration portal, and successful completion of the MNsure Data Privacy and Security course, MNsure will:

- Send out a certification confirmation notice via email with information and next steps.
- List MNsure certified agents and brokers in the public assister directory if agent/broker selected "taking new clients" in the agency Roster.

Agency Registration Account Password Resets

Password resets can be done via the registration portal for the agency account. Click on the "reset password" link and you will be sent an email with a link to follow. If further assistance is needed, please contact the Broker Team.

Technical Issues

If you are experiencing technical difficulties, please contact the Broker Team.

MNsure Approved Continuing Education Providers

MNsure approved CE providers will offer the first part of the certification coursework **beginning on September 8, 2015**. The list of providers can be found on Broker One Stop.

Broker Address Changes

Broker roster address changes can be done via the registration portal through the agency account. If further assistance is needed, please contact the Broker Team.

1. Click on the “manage my roster” link on Broker One Stop.
2. Once logged in, click on the main Broker Self Service tab.
3. Click on the “view details” link for the broker changes are needed.
4. Edit information and then click on “update.”

Glossary

Signature Authority

The signature authority has delegated authority from the organization to enter into legal agreements. The signature authority is also responsible for signing the organization’s contract. Typically this role is held by the CEO or owner of the agency.

- Disclose possible conflicts of interest at application and after the contract is signed.

Contract Manager

The Contract Manager is responsible for:

- Account Administrator changes
- Organizational Name changes
- Organizational Primary Address changes

HIPAA/Data Privacy Contact

The HIPAA/Data Privacy Contact is responsible for Agency Data Privacy and Security compliance. MNsure will contact this person for any data breaches or data security issues within your agency.

Responsible for Agency Data Privacy and Security, including:

- Following-up with staff who have received a warning for non-compliance with data privacy.
- Ensure staff successfully completes training, which includes training on data privacy requirements as well as ongoing compliance with requirements.

Account Administrator

The Account Administrator is responsible for administrative functions related to MNsure and the MNsure registration.

Responsible for the following functions:

- Location address changes and/or updates for the agency
- Timely additions or deletions to staff—to be managed in the agency registration account via the roster
- Coordination and communication of certification for assisters within agency/organization.
- Activating or inactivating individual assisters using the agency's roster found in the agency account.
- Responsible for management of MNsure marketing materials.
- Ensuring individual assister data is current and accurate, which may or may not be used in the directory, including:
  - Location address changes for the organization's individual assisters.
  - Assister name changes.
  - Providing additional languages spoken.
  - Email or phone number changes.

Enforcement Case

Administrative action(s) taken against MN Health Accident and Life Producer licensure by the Minnesota Department of Commerce. In order to make a final determination for certification, additional information may be requested.

Assister Role

The Assister is responsible for submitting any necessary paperwork regarding certification.

Payment Coordinator

Responsible for contacting MNsure regarding any enrollment payment issues and taking the steps needed to resolve those issues as directed.

National Producer Number

The NPN is a unique number that identifies each producer entity in the Producer Database (PDB). It was initially created to provide a solution to privacy issues surrounding the use of the Social Security Number. The NPN is up to a 10-digit number, without leading zeros, that is assigned to individual producers, as well as some agencies. Click here to find your NPN.