MNsure
Where you choose health coverage

2014/2015 Agency Notice of Intent Registration and Agent/Broker Certification

Contents

Agency Registration and Agent/Broker Certification

The MNsure registration portal is a secure, self-service site for Agencies to create an account to track the certification progress of each of their Agents/Brokers. This is the first step in the process for Agents/Brokers within the agency to become certified and sell policies with MNsure. All Agencies, Agents and Brokers, regardless of registration and certification in 2013, will be required to complete the necessary steps in the new registration portal this year.

Once the agency registration is completed the designated Account Administrator will enter the Roster of Agents and Brokers. Certification requirements will be entered and tracked in the Roster for each Agent and Broker who would like to enroll consumers in health plans available through MNsure for the Plan Year 2015.

The Roster information that is entered by your agency will create a contact record in our database for each agency and Agent/Broker. Any changes to the agency or Agent/Broker Roster, such as address, can be changed by the designated Account Administrator via the registration portal. The changes will reflect in the record with MNsure and will populate the directory once approved.

Certification, a two-part process, is the second step and will begin on October 1, 2014. The list of approved MNsure CE providers is located on the MNsure website and Broker One Stop.

Agency Registration: Two Step Process

- Step I: Agency Registration
- Step II: Agent/Broker Roster entry and certification tracking

Step I: Agency Registration

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

Please note for a one-person agency/organization, it is possible for all of these roles will be filled by one person. Each role must be assigned before proceeding to the next screen.

You may change the contact information for each role at a later date via self-service if there is a different person assigned to a specific role.

The definitions of each role can be found in the Glossary.

- 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 -- it is recommended that more than one person hold this designation.

Agency Registration Steps

1. Visit our public webpage, www.mnsure.org or Broker One Stop.
2. Click on the "For Assisters" link on the top right of the MNsure.org homepage. On the next screen select Agents/Brokers. You can access Registration on this page or by clicking on the Broker One Stop button.
3. Click on "Register Your Agency" button on either page.
4. You will now be directed to the registration portal to enter information into the required fields marked with an asterisk.
5. Once completed, click on the "submit" button.
6. An email with confirmation of successful registration will be sent to the Primary Contact listed.
7. On the next screen enter in the designated Account Administrator. Click "submit."
8. You will then enter in Account Administrator Last Name and email address.
9. An email will be sent with a link to change the password. This can only be used once and must be used within 2 hours.
10. Follow the directions sent in the email, you will be directed to a log in screen where the password change will be entered.
11. 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 and successfully enter information.**
12. Agency registration is complete. Follow Step II to enter in the agents/brokers interested in becoming MNsure certified.

Step II: Agent/Broker Entry into the Agency Roster

In Step II of the agency registration process, the designated Account Administrator will enter and track the progress of the Agents/Brokers seeking certification with MNsure. Certification begins on October 1, 2014 and will remain open throughout the year so Agents/Brokers may complete the certification requirements at their own pace. **Certification requirements may be met prior to the open enrollment period however certification isn't effective until November 15.**

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 plan to sell MNsure products.

Please note: It is only necessary to list those agents in your agency that will be selling MNsure plans.

The following information is required for each Agent/Broker seeking certification to sell through MNsure:

- 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 checked here the Agent/Broker will be certified but not listed in the public directory. 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 tracking portal and making the change.

Agent/Broker Entry Steps

1. To enter the Agents/Brokers seeking MNsure certification within the Agency click on the ‘Manage Your Roster’ link and you will be prompted to log in. **If there isn’t any information entered into your roster yet the message, “no records found”, will display.**
2. Click on ‘add broker’ and enter information into the required fields marked with an asterisk.
3. For each Agent/Broker entry you will be asked to accept the terms of the MNsure Individual Certification Agreement for each Agent/Broker 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 information into the required fields marked with an asterisk.
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 and show in your “my brokers” list.

Broker/Agent Certification Tracking-Registration Portal

Once the Roster information is complete and is populated in ‘my brokers’ you will begin tracking the certification progress of each of the Agents and Brokers in the agency. MNsure approved CE providers offered certification coursework beginning on October 1, 2014. The list of approved MNsure CE providers is located on Broker One Stop.

Training Tracking Steps

- Visit our public webpage or Broker One Stop.
- Click on the “For Assisters” link at the top right of the page and select Agents/Brokers from the links on the left side of the screen.
- Click on “Manage Your Roster” button on that page or click on Broker One Stop button to click on “Manage Your Roster”.
- Designated Account Administrator will log in with email and password.
- Click on ‘view broker training’ tab.
- Use the drop-down box to select the Agent/Broker for whom you would like to enter training. *If no agents/brokers have been entered into the Roster go back and complete Step II.
- Enter in the fields marked with an asterisk. A confirmation number is not necessary for the information to register.
- Hit Submit.
- If you would like to enter additional training repeat steps 6-8.

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

Broker/Agent Certification Opens October 1, 2014

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

1. Agree to the MNsure Individual Certification Agreement and the Notice of Monitored Broker Performance documents.
2. Select one of the MNsure approved Continuing Education Providers to complete the required coursework.
   a) Continuing Education credits will be given upon completion.
3. Read, agree and attest review of the MNsure Data Privacy and Security guidelines. An email will be sent once the CE credits are entered into the registration and training tracking portal.

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 entry into the registration portal, and attested review to the Data Privacy and Security guidelines, 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 beginning November 15, 2014.

Agency 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 certification coursework **beginning on October 1, 2014**. The list of providers can be found on Broker One Stop.

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 HIPPA/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 the administration of organizational data. This role can have multiple designations per organization.

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.
- Ensuring directory information is current and accurate.

The Account Administrator is responsible for the administration of organizational data. This role can have multiple designations per organization.

The role 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.
- Activating or inactivating individual assisters using the agency's roster found in the agency account.
- Responsible for management of MNsure Marketing Materials (Bolger).
- Coordination and communication of certification for assisters within organization.
- 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.