MNsure

Where you choose health coverage

Agency Registration and Broker Certification

Contents

Broker Certification Steps

MNsure certification for the annual open enrollment period begins late summer every year and remains open through the open enrollment period so brokers may complete the certification requirements at their own pace. The annual registration and training requirements must be met prior to assisting consumers with plans available on the MNsure marketplace.

All brokers must complete the following:

1. Register agency and broker information through the online broker registration forms.
2. 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.
3. Complete the annual Assister Data Security, Accessibility, Compliance & Ethics course through MNsure's online Learning Management System.
4. Complete the additional required MNsure Broker Certification Training coursework through MNsure's online Learning Management System.

After agency registration is completed and broker information is entered into the roster form, an email with a link to the MNsure online training site containing a unique ID and access information and tips will be sent to the primary email address entered in the online roster form.

Please note: If the broker has not been entered in the agency roster form, the automated email will not be sent.

Once attestation has been recorded for the MNsure Individual Certification Agreement and the Notice of Monitored Broker Performance documents and all required training has been successfully completed, MNsure will:

- Send out a certification confirmation notice via email containing the MNsure Certified Broker Resource Guide.
- List MNsure certified brokers in the public assister directory if broker selected 'taking new clients' in the agency roster.
- If the optional Assister Portal training (as well as all of the required certification training) is completed a portal account will be created.

Agency Registration and Certification Step by Step

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

Once the agency registration is completed, the designated account administrator will enter brokers into the agency roster for each broker seeking certification.

The roster information entered for each 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 broker'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 through the MNsure online registration forms. 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 after 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 MNsure.org to begin the process.
2. Click on Register Your Agency button.
3. You will now be directed to the registration tool 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 two 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 message “Your search / login was successful, however there are no records to display.” will display.
11. Agency registration is complete.

Agency Registration—Changes to Agency Information

How to Make Changes to Agency Registration Information

If an agency would like to change information in their existing agency registration such as changing the person assigned to an agency designated role or an email address, send a request to the Broker Team with the agency’s name and the changes needed on their account. Once received the request will be processed in approximately one business day.

Agency Roster—Enter a New Broker

Once the agency has received confirmation of registration, the designated account administrator will enter brokers interested in becoming certified with MNsure in the agency roster. Required information entered by the account administrator allows MNsure to track the certification training progress of each of the registered brokers listed in the agency roster.

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

What Agency Administrators Will Need to Begin

Prior to entering the agency roster in the agency registration form agency administrators should gather the following information for all brokers working at the agency or contracted with the agency who would like to become certified to sell plans available through the MNsure marketplace.

Please note: It is only necessary for agencies to list brokers in the roster form that are seeking certification to sell plans available through MNsure.

The following information is required for each broker:

- Last name
- First name
- Carrier appointments: check all carriers for which the broker has a contract
- Primary email address
- Directory address
- Directory phone number
- County
- Directory email
- Market served (choose one: 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, the broker will be certified but not listed in the public assister directory on MNsure’s website. This can be changed at a later date if the 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 tool to make the change.

Broker Roster Entry Steps

1. To enter brokers seeking MNsure certification within the agency click on the ''Manage Your Roster” link and you will be prompted to log in**. Please note: If you have not yet added any brokers to the agency roster the message “Your search / login was successful, however there are no records to display.” 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 on behalf of each broker seeking certification prior to proceeding to the next page to enter in the information.
4. Once the broker has read the terms and they are accepted, click the first radio button and click Submit and the Add a New Broker screen will appear.
5. If the broker does not agree to the terms, the process will not continue. You will have another opportunity after you hit submit to accept the terms for the process to continue.

6. Enter broker information into the required fields.
7. Once you enter in all of the required information and click Submit two emails will be sent to the broker entered in the roster. One is to confirm acceptance of the MNsure Individual Certification Agreement and the Notice of Monitored Broker Performance documents, the second email provides instruction on how to access the required certification coursework.
8. If the broker is entered into the roster and has received the confirmation email but no longer agrees to the terms of the agreement documents please contact the Broker Team. We will make the changes to the broker registration record and this will stop the process of certification.
9. Registration is complete once all brokers interested in seeking certification are entered. A list view of brokers will show by clicking on the tab labeled Broker Registration Home.

Agency Roster—Editing Broker Roster Form Information

Any changes to the broker roster form, such as address, can be changed by the designated account administrator via the agency registration account. The changes will reflect in the record with MNsure and will populate in the next directory update once approved.

Editing Broker Step-by-Step Information:

1. Click on the Manage Your Roster link and you will be prompted to log in. Click on the main tab Broker Registration Home, this will display all current brokers listed in the agency roster.
2. When the list appears click the View Details link on the right side of the gray bar for each currently registered broker.
3. You will be directed to the page where you can update the necessary fields. Review each field to ensure all fields are completed and current information is entered. Click the Update button.
4. If broker is no longer working for the agency please see instructions below for inactivating or removing a broker from a roster.
5. Repeat this process for each broker listed in the tab labeled View Brokers.
6. Once updates are completed, log out and the process is complete.

Inactivating or Removing a Broker from a Roster

If an account administrator would like to change the status of a broker in their roster from active to inactive or would like a broker to no longer appear on their roster for any reason, send a request to the Broker Team with the broker's first and last name and NPN for verification. Once received the request will be processed in approximately one business day.

Technical Assistance

Agency Registration Account Password Resets

Registration form user name and password resets can be done via the registration tool for the agency account. Click on the Manage Your Roster link and then “reset your username and password” link. The designated agency administrator be sent an email with a link to follow. If further assistance is needed, please contact the Broker Team.

Password Requirement Help

- Password must include 8 characters of letters, numbers, and special characters.
- Password must include at least 1 number.
- Password must include at least 1 uppercase and at least 1 lowercase letter.
- Password must include at least 1 special character from the following list: ! “ # $ % & ( ) , . : = ? @ or space character.

Requesting Certification Training for Non-Licensed Agency Staff

Agency staff that would like to complete certification coursework can request access to our Learning Management System. A unique ID will be created within two business days and will be emailed to the email address provided.

Please include the following information in your email for each person seeking MNsure online training access:

- First name
- Last name
- Email address
- Agency name
- Agency address

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 the administration of organizational data.

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.

- 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

The payment coordinator is responsible for contacting MNsure regarding any enrollment payment issues and taking the steps needed to resolve those issues as directed.

National Producer Number (NPN)

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. Find your NPN.