



Virtual Marketing, Selling and Enrolling Checklist

You're ready to sell individual qualified health plans when you complete these items.

Complete Federally Facilitated Marketplace (FFM) Training

CMS requires us to verify your plan year 2021 FFM registration before paying you or your agency for a Marketplace (on-exchange) policy.

Action Items

1. Check out these [FFM registration tips](#) and our [FFM registration business rules](#).
2. See CMS's [Plan Year 2021 Registration and Training site](#) with the latest news and resources.

Learn about our Retail Product Line and Complete our Training

Plan Year 2021 Retail Readiness Product Training includes an overview of our individual product line. It also covers networks, pharmacy benefits, resources and much more.

Action Item

To access plan year 2021 product training, log into [Blue Access for ProducersSM](#), click on the "Individual" icon, select "Training & Admin" and choose "Annual Product Training." Once you access the training, you can watch a recording or use the training deck.

Register to Use the Retail Producer Portal for Quoting and Enrolling

The [Retail Producer Portal](#) is a comprehensive sales and client service tool for the individual ACA market. The portal enables you to design and deliver quotes and **enroll clients in Blue plans** virtually.

Action Items

1. [If you aren't registered to use the portal, it's easy to do.](#)
2. After registering, [see our guide for more details on using the portal.](#)
3. When you use the Retail Producer Portal to enroll clients, know your [virtual client authorization options](#).

Use Marketing and Sales Resources when Working with Clients

Access a host of online resources to help you market and sell our retail ACA plans.

Action Items

1. See our [Producer Retail Readiness microsite](#), bookmark it or save it to favorites and check back often for the latest information.
2. Use our [Producer Supply Portal](#) for ordering and mailing sales kits. For more on the portal, [go here](#).
3. Access [Summaries of Benefits and Coverage, Outlines of Coverage and Plan Comparison Charts](#).

** FFM registration and SEP training must be completed and recorded with the writing producer's NPN, not the agency's NPN.*