

**Centers for Medicare & Medicaid Services (CMS)  
Federally-facilitated Exchange (FFE) Training for Agents and Brokers**

# Plan Year 2026 Vendor Application

This Vendor Application is to be completed by entities requesting approval to host FFE training for agents and brokers for the 2026 plan year pursuant to 45 C.F.R. § 155.222. Final approval for any vendor is contingent on signing an Agent Broker Vendor Agreement with CMS, approval of vendor’s final training content, approval of vendor’s information technology and data storage processes, adequate technical support, and compliance with applicable system standards and other regulatory requirements, including the requirement to offer continuing education units (CEUs) in at least five FFE or State-based Exchange on the Federal Platform (SBE-FP) states.

**NOTICE OF INTENT:** FOR RESOURCE PLANNING PURPOSES, CMS REQUESTS THAT ALL VENDORS SUBMIT A NOTICE OF INTENT TO [AgentBrokerVendor@cms.hhs.gov](mailto:AgentBrokerVendor@cms.hhs.gov) NO LATER THAN **11:59 P.M. EST ON JANUARY 10, 2025**. The Notice of Intent to submit an application should be provided in the form of a simple email message. It is not binding and will be relied on by the Government for planning purposes only. Submitting a negative response or no response does not preclude an organization from submitting an application.

**APPLICATION DEADLINE:** ALL VENDOR APPLICATION MATERIALS ARE DUE TO CMS BY **11:59 P.M. EST ON JANUARY 17, 2025**. APPLICATION MATERIALS MUST BE SUBMITTED TO: [AgentBrokerVendor@cms.hhs.gov](mailto:AgentBrokerVendor@cms.hhs.gov). **INCOMPLETE APPLICATIONS WILL NOT BE REVIEWED AND WILL BE DENIED.**

Please note that CMS reserves the right to request additional documentation for all items in this application.

## I. General Information

### A. Terms and Definitions

Term	Definition
1. Applicant	Entity applying to be a vendor of FFE training for agents and brokers. This is the same entity that is entered in Part II, Section A, #1.
2. Primary Contact Person	Applicant representative through whom CMS contacts will be facilitated. This person has the authority to submit information and responses on behalf of the Applicant. This is the same person who is entered in Part II, Section A, #7. (The Primary Contact Person may be the same as the Authorized Representative, but it does not need to be.)
3. Authorized Representative	Applicant representative who has the authority to bind the Applicant, and attest to organizational commitments and statements on behalf of the Applicant. This is the same person who is entered in Part V. (The Authorized Representative may be the same as the Primary Contact Person, but it does not need to be.)
4. Total users	Total number of unique users who have accounts or profiles established to access a training system.
5. Concurrent users	Total number of unique users who are accessing a training system at the same point in time. The number of concurrent users can never be larger than the number of total users.
6. Learning Management System	A software application for the administration, documentation, tracking, reporting, and delivery of electronic educational technology (also called e-learning), education courses, or training programs.

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7. Technical Assistance Responding to individual inquiries and providing programmatic support to users who access and attempt to complete the training program. Technical assistance can pertain to a wide array of topics, including but not limited to: maneuvering the training content online, researching training completion record transmission to CMS and escalating as needed, and/or explaining program requirements.
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## B. Rules of Participation

In addition to executing an Agent Broker Vendor Agreement with CMS, approved vendors must adhere to the following Rules of Participation. The organization must:

1. Participate in any requested teleconference calls with CMS staff and contractors to discuss relevant experience, organizational training, information technology capability, quality control procedures, and role of subcontractors (if applicable).
2. Properly conduct system integration testing, including thorough quality assurance of the vendor's website, and identify issues in the vendor's technical build to document for CMS two weeks prior to user acceptance testing (UAT).
3. Perform UAT, smoke testing (build verification testing) and testing in production prior to Plan Year 2026 go-live with or for CMS.
4. Provide payment bypass information to CMS prior to UAT.
5. Attest to the accuracy of the Applicant's data collection prior to submission to CMS.
6. Develop and submit a Quality Assurance Plan by the deadline established by CMS.
7. Submit materials relevant to the training program, including plans for data sharing with CMS, and adhere to CMS business requirements and technical specifications for content, format, and delivery of training processes.
8. Participate in and cooperate (including subcontractors) with all compliance and oversight activities conducted by CMS staff and contractors.
9. Meet programmatic and submission deadlines, as specified by CMS.
10. Vendor is required to use the CMS-developed training curriculum and will also have the option to offer their own vendor-developed content as a supplement to the CMS training. Vendor will provide this supplemental content in modules separate from the CMS-developed training curriculum. Supplemental content can include new and substantive information to further educate agents and brokers regarding the Marketplace. The vendor-developed supplemental content will need to be reviewed and approved by CMS.
11. Acknowledge that if a vendor's created or developed supplemental content does not meet CMS' quality standards, it will be disapproved by CMS.
12. Permit any individual who holds a valid license (or equivalent State authority) to sell health insurance products to access the vendor's training.
13. Adopt a fee structure that is generally consistent with the fee structure for comparable health insurance trainings offered to agents and brokers, is compliant with applicable state laws and regulations, and is easily accessible for agents and brokers to review prior to purchase.
14. Acknowledge that CMS may, at its sole discretion, terminate, discontinue, or not renew the "approved" status of a vendor.
15. Execute the Agreement Between CMS and Vendor of FFE Training for Agents and Brokers ("AB Vendor Agreement")
16. Comply with the specifications and standards outlined in the AB Vendor Agreement and all applicable guidance documents provided by CMS.

Please acknowledge that review of, and agreement with, the Rules of Participation is necessary for plan year 2026 participation. Certify below that your organization has reviewed and agrees to adhere to the Rules of Participation listed above. Failure to satisfy any of these requirements can result in automatic disqualification of an Applicant to become an approved vendor.

Name

Title

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Organization

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Date

Signature

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## II. Applicant Organization Experience

Please check "Yes" or "No" for each item below, as appropriate. Note that a "No" response is not an automatic disqualification of an Applicant to become an approved vendor.

### A. Applicant Information

1. Legal Name of the Applicant Organization

2. Federal Employer Identification Number (FEIN)

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3. Organization's Primary Mailing Address

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City

State

Zip Code

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4. Organization's Primary Telephone Number

5. Website Address

6. Month and Year Company Founded

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7. Primary Contact Person

First Name

Middle Initial

Last Name

8. Primary Contact Person's Title

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9. Primary Contact Person's Telephone Number

10. Primary Contact Person's Email Address

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11. Has the applicant organization been approved by CMS to offer FFE training for agents and brokers in a previous plan year?

Yes

No

12. Does the applicant currently have an independent network (i.e., does not rely on relationships acquired through contractual support to CMS) of 15,000 or more licensed health insurance agents and brokers?

Yes

No

13. What is the applicant's training goal for FFE training for plan year 2026?

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### Explanation

Please explain any "No" responses in Part II, Section A, and indicate the answer(s) to which the explanation applies. (Attach additional sheets if necessary.)

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## B. Relevant Training Experience

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### 1. Indicate training experience since November 1, 2019.

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i. Applicant has hosted agent and broker training –		
a. For a minimum of two consecutive years, at any point during the five year period	<input type="checkbox"/> Yes	<input type="checkbox"/> No
b. That supported 2,500 or more concurrent users, at any point during the five year period.	<input type="checkbox"/> Yes	<input type="checkbox"/> No
c. For at least 15,000 total users, at any point over the five year period.	<input type="checkbox"/> Yes	<input type="checkbox"/> No
ii. Applicant has offered training with CEU accreditation in at least five FFE or SBE-FP states.	<input type="checkbox"/> Yes	<input type="checkbox"/> No
iii. Applicant has hosted Sharable Content Object Reference Model (SCORM) compliant web-based training content and examinations.	<input type="checkbox"/> Yes	<input type="checkbox"/> No
iv. Applicant has hosted web-based training content and examinations that comply with Section 508 of the Rehabilitation Act of 1973 and/or the <a href="#">World Wide Web Consortium's Web Content Accessibility Guidelines (WCAG) 2.0 Level AA</a> standards.	<input type="checkbox"/> Yes	<input type="checkbox"/> No
v. Applicant has experience with functional and performance testing of a learning management system.	<input type="checkbox"/> Yes	<input type="checkbox"/> No
vi. Applicant has designed and implemented quality control and assurance measures for training and exam delivery.	<input type="checkbox"/> Yes	<input type="checkbox"/> No
vii. Applicant has run auditing and reporting features securely and reliably through a web-based solution.	<input type="checkbox"/> Yes	<input type="checkbox"/> No
viii. Applicant has provided technical assistance to at least 15,000 total users via—		
a. Web-form, web-chat, or email.	<input type="checkbox"/> Yes	<input type="checkbox"/> No
b. Telephone.	<input type="checkbox"/> Yes	<input type="checkbox"/> No
ix. Applicant has securely submitted training and user data—		
a. To an external third-party organization.	<input type="checkbox"/> Yes	<input type="checkbox"/> No
b. To a federal or state entity.	<input type="checkbox"/> Yes	<input type="checkbox"/> No
c. Via a secure file transfer protocol (SFTP) integration with an external system.	<input type="checkbox"/> Yes	<input type="checkbox"/> No
d. Via a secure web service exchange (e.g., extensible markup language (XML) gateway) with an external system.	<input type="checkbox"/> Yes	<input type="checkbox"/> No
x. Applicant has created secure user accounts that can be updated by the host (Applicant) or the user (learner).	<input type="checkbox"/> Yes	<input type="checkbox"/> No



**2. Indicate training experiences since November 1, 2019.**

**Note: If Applicant offered FFE training for agents and brokers in a previous plan year, Applicant should only list new trainings offered since the last approved plan year application. If returning Applicant has no new trainings to report, please proceed to Section C.**

**i. If Applicant has offered federal- or state-sponsored training since November 1, 2019, please list below. (Attach additional sheets if necessary.)**

a. Name of Curricula / Courses and URL Start and End Dates

Target Audience	# of Total Users	# of Concurrent Users	Cost to Learners
			\$
Federal or State Agency Sponsor		Mode of Training	
		<input type="checkbox"/> IN-PERSON <input type="checkbox"/> WEB-BASED <input type="checkbox"/> BOTH	
Specific Topics Covered in Curricula / Courses			

b. Name of Curricula / Courses and URL Start and End Dates

Target Audience	# of Total Users	# of Concurrent Users	Cost to Learners
Federal or State Agency Sponsor		Mode of Training	
		<input type="checkbox"/> IN-PERSON <input type="checkbox"/> WEB-BASED <input type="checkbox"/> BOTH	
Specific Topics Covered in Curricula / Courses			

c. Name of Curricula / Courses and URL Start and End Dates

Target Audience	# of Total Users	# of Concurrent Users	Cost to Learners
Federal or State Agency Sponsor		Mode of Training	
		<input type="checkbox"/> IN-PERSON <input type="checkbox"/> WEB-BASED <input type="checkbox"/> BOTH	
Specific Topics Covered in Curricula / Courses			



d. Name of Curricula / Courses and URL

Start and End Dates

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Target Audience

# of Total Users

# of Concurrent Users

Cost to Learners

--	--	--	--

Federal or State Agency Sponsor

Mode of Training

--

IN-PERSON     WEB-BASED     BOTH

Specific Topics Covered in Curricula / Courses

--

e. Name of Curricula / Courses and URL

Start and End Dates

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Target Audience

# of Total Users

# of Concurrent Users

Cost to Learners

--	--	--	--

Federal or State Agency Sponsor

Mode of Training

--

IN-PERSON     WEB-BASED     BOTH

Specific Topics Covered in Curricula / Courses

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**ii. If Applicant has offered large scale training (i.e., demonstrated capability to host 2,500 or more concurrent users and/or 15,000 or more total users) since November 1, 2019, OTHER THAN federal- or state-sponsored training listed in question 2.i. above, please list below. (Attach additional sheets if necessary.)**

a. Name of Curricula / Courses and URL

Start and End Dates

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Target Audience

# of Total Users

# of Concurrent Users

Cost to Learners

--	--	--	--

Federal or State Agency Sponsor

Mode of Training

--

IN-PERSON     WEB-BASED     BOTH

Specific Topics Covered in Curricula / Courses

--

b. Name of Curricula / Courses and URL

Start and End Dates

--	--

Target Audience

# of Total Users

# of Concurrent Users

Cost to Learners

--	--	--	--

Federal or State Agency Sponsor

Mode of Training

--

IN-PERSON     WEB-BASED     BOTH

Specific Topics Covered in Curricula / Courses

--

c. Name of Curricula / Courses and URL

Start and End Dates

--	--

Target Audience

# of Total Users

# of Concurrent Users

Cost to Learners

--	--	--	--

Federal or State Agency Sponsor

Mode of Training

--

IN-PERSON     WEB-BASED     BOTH

Specific Topics Covered in Curricula / Courses

--

d. Name of Curricula / Courses and URL

Start and End Dates

--	--

Target Audience

# of Total Users

# of Concurrent Users

Cost to Learners

--	--	--	--

Federal or State Agency Sponsor

Mode of Training

--

IN-PERSON     WEB-BASED     BOTH

Specific Topics Covered in Curricula / Courses

--

e. Name of Curricula / Courses and URL

Start and End Dates

--	--

Target Audience

# of Total Users

# of Concurrent Users

Cost to Learners

--	--	--	--

Federal or State Agency Sponsor

Mode of Training

--

IN-PERSON     WEB-BASED     BOTH

Specific Topics Covered in Curricula / Courses

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### Explanation

Please explain any "No" responses in Part II, Section B, and indicate the answer(s) to which the explanation applies. (Attach additional sheets if necessary.)

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## C. Relevant Data and Information Technology Experience

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### 1. Indicate experience with data security and retention since November 1, 2019.

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i. Applicant safeguards system data via back-up and offsite storage  Yes  No

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ii. Applicant follows established procedures for identifying and reporting breaches of confidential data.  Yes  No

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iii. Applicant follows applicable federal and state requirements for collection and storage of personally identifiable information (PII).  Yes  No

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#### Explanation

Please explain any "No" responses in Part II, Section C, and indicate the answer(s) to which the explanation applies. (Attach additional sheets if necessary.)

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## D. Compliance History

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1. Current regulatory, enforcement, or legal actions are pending against the Applicant by a state or federal regulator.  Yes  No

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2. Regulatory, enforcement, or legal actions have been taken against the Applicant by a state or federal regulator at any time since November 1, 2019.  Yes  No

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#### Explanation

Please explain any "Yes" responses in Part II, Section D, and indicate the answer(s) to which the explanation applies. (Attach additional sheets if necessary.)

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### III. Capacity to Host FFE Training

Please check "Yes" or "No" for each item below, as appropriate. Note that a "No" response is not an automatic disqualification of an Applicant to become an approved vendor.

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#### A. Training Program

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##### 1. Indicate current capacity to offer FFE training for agents and brokers.

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i. Applicant intends to plan, create, and deliver its own supplemental training curricula as separate modules from the CMS-developed training curriculum, based on CMS content requirements instead of using only CMS-developed training content. The supplemental training provides new, substantive content to further educate agents and brokers regarding the Marketplace.  Yes  No

*Note: Vendor will not be allowed to integrate supplemental content into CMS-developed modules. If a vendor requests to offer its own training curricula, vendor will need to develop their own curriculum as separate modules. The vendor's decision is not scored and has no impact on the application review process.*

**Applicants who intend to create their own supplemental training curricula must respond to questions a through c below. Applicants who intend to offer only CMS-developed training should proceed directly to question ii.**  Yes  No

a. Applicant has in-house subject matter experts (SMEs), or has the capacity to hire, contract, or subcontract with SMEs, who can develop complete and accurate FFE training for agents and brokers based on CMS content requirements.  Yes  No

b. Applicant has capacity to design and develop a web-based training program within three months of the date of conditional approval.  Yes  No

c. Applicant has the capacity to conduct thorough quality assurance reviews of all independently created content.

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ii. Applicant has capacity to host web-based training (including exams) for 2,500 or more concurrent users and 15,000 or more total users over 12 consecutive months.  Yes  No

If yes, please submit documentation to demonstrate this capacity.

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iii. Applicant has capacity to develop a learning management system that can integrate CMS-developed training content within five months of the date of conditional approval  Yes  No

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iv. Applicant has the capacity to obtain CEU accreditation for FFE training in at least five FFE or SBE-FP states prior to the deadline established by CMS  Yes  No

If yes, select all FFE/SBE-FP states where applicant intends to apply for CEUs.

- Alabama
- Alaska
- Arizona
- Arkansas
- Delaware
- Florida
- Georgia
- Hawaii
- Illinois

- Indiana
- Iowa
- Kansas
- Louisiana
- Michigan
- Mississippi
- Missouri
- Montana
- Nebraska

- New Hampshire
- North Carolina
- North Dakota
- Ohio
- Oklahoma
- Oregon
- South Carolina
- South Dakota
- Tennessee

- Texas
- Utah
- Virginia
- West Virginia
- Wisconsin
- Wyoming



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**2. Indicate current capacity to collect and store user data.**

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- |       |   |  |
|-------|---|--|
| i.    | Applicant has capacity to collect and store identifying information for 15,000 or more total unique users, and up to 2,500 concurrent users, over 12 consecutive months   | <input type="checkbox"/> Yes <input type="checkbox"/> No         |
|       |   | If yes, please submit documentation to demonstrate this capacity |
| ii.   | Applicant has capacity to securely collect, store, and share FFE training completion data with CMS  | <input type="checkbox"/> Yes <input type="checkbox"/> No         |
| iii.  | Applicant has the ability to establish a Security Assertion Markup Language (SAML) re- direct from CMS to the vendor website  | <input type="checkbox"/> Yes <input type="checkbox"/> No         |
| iv.   | Applicant has the ability to re-direct users and securely transmit their training completion data, including global user identifiers, for each user upon completion of training. <sup>1</sup>                             | <input type="checkbox"/> Yes <input type="checkbox"/> No         |
| v.    | Applicant has the ability to schedule the transmission of training completion data via SFTP   | <input type="checkbox"/> Yes <input type="checkbox"/> No         |
| vi.   | Applicant has the ability to transmit training completion data via a secure webservice exchange (e.g., XML gateway)   | <input type="checkbox"/> Yes <input type="checkbox"/> No         |
| vii.  | Applicant has the ability to verify eligibility for returning agents and brokers by cross-referencing the National Producer Numbers provided by agents and brokers with the previous year's Registration Completion List. | <input type="checkbox"/> Yes <input type="checkbox"/> No         |
| viii. | Applicant has capacity to track users' progress and learner data using a data management system.  | <input type="checkbox"/> Yes <input type="checkbox"/> No         |
| ix.   | Applicant has capacity to handle concurrent data and metrics requests from CMS, on both a regular and ad hoc basis.   | <input type="checkbox"/> Yes <input type="checkbox"/> No         |
- 

<sup>1</sup> Training completion data includes a vendor identifier, curriculum type, plan year, language, and date/time of completion.

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**3. Indicate current capacity to provide technical assistance/customer support.**

i. Applicant has capacity to provide tier-one help desk support to assist agents and brokers accessing the Applicant's FFE training platform from the CMS Enterprise Portal during regular business hours.<sup>2</sup>

a. Web-form, web-chat, or email.

Yes  No

b. E-mail support.

Yes  No

If yes, please submit documentation to demonstrate this capacity. Documentation should include expected response times, standard operating hours, and after-hours technical support options, if applicable.

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ii. Applicant has capacity to establish multiple escalating levels of technical help desk support to resolve inquiries including, but not limited to, basic navigation and system questions, troubleshooting, and researching of technical issues.

Yes  No

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iii. Applicant has the capacity to provide CMS with technical support data and metrics on both a regular and ad hoc basis.

Yes  No

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iv. Applicant has capacity to coordinate technical support with other CMS technical support resources.

Yes  No

**Explanation**

Please explain any "No" responses to Part III, Section A and indicate the answer(s) to which the explanation applies. (Attach additional sheets if necessary.)

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<sup>2</sup> For any inquiry received by the vendor's help desk, tier-one support includes intake, initial response, and resolution of inquiry through a scripted response or rerouting to the appropriate CMS help desk. The vendor help desk should be appropriately staffed to ensure that inquiries can be answered within 24 hours. In order to provide support compatible with and comparable to CMS' help desks, the vendor's help desk should, at a minimum, provide phone support to address system access issues and email support for other inquiries.

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## B. Data Privacy and Security

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### 1. Indicate current capacity to protect user data and maintain confidentiality.

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- i. Applicant has the capability to submit encrypted data through a secure, electronic connection with CMS, according to the applicable standards described in the following sources:  Yes  No
- [CMS security requirements](#)
  - [The Federal Information Security Management Act of 2002 \(FISMA\), 44 U.S.C. Chapter 35](#)
  - [OMB Circular A-130](#)
  - [NIST SPs 800-53 and 800-53A](#)
  - [CMS Information Security Acceptable Risk Safeguards \(ARS\) and CMS Minimum Security Requirements \(CMSR\) as amended](#)
  - [Other policies, standards, procedures, and templates located on the CMS Information Security and Privacy Library](#)
- If yes, please submit documentation to demonstrate this capacity.
- 
- ii. Applicant has capacity to obtain authorization from agents and brokers to collect data on their behalf and submit the data to CMS.  Yes  No
- 
- iii. Applicant has process in place to obtain confidentiality agreements from staff and subcontractors  Yes  No
- 
- iv. iv. Applicant has capacity to work with CMS to resolve learning and user account data inconsistency problems  Yes  No
- 
- v. In order to protect the privacy and security of users' identifying information, including training data and PII, Applicant has the capacity to receive, process, and store data according to the standards described in the following documents:  Yes  No
- [CMS security requirements](#)
  - [FISMA, 44 U.S.C. Chapter 35](#)
  - [OMB Circular A-130](#)
  - [NIST SPs 800-53 and 800-53A](#)
  - [CMS Information Security ARS and CMSR as amended](#)
  - [Other policies, standards, procedures, and templates located on the CMS Information Security and Privacy Library](#)
- If yes, please submit documentation to demonstrate this capacity.
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### Explanation

Please explain any "No" responses to Part III, Section B and indicate the answer(s) to which the explanation applies. (Attach additional sheets if necessary.)



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## C. Quality Assurance and Quality Improvement

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### 1. Indicate current capacity to conduct quality assurance and quality improvement activities.

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- i. Applicant has the capacity to design and implement a Quality Assurance Plan, implement quality control procedures, conduct continuous quality improvement, and provide written evidence of its processes for collecting and accurately processing data for all phases of training and information technology implementation, including: development of email and web-based marketing materials; testing, web-hosting, data collection and secure storage; preparing final data files for submission to CMS; interfacing with CMS systems; and all other functions and processes that affect the FFE training processes  Yes  No  
If yes, please submit documentation to demonstrate this capacity.
- 
- ii. Applicant has capacity to prepare, accommodate, and plan for reviews by CMS staff or contractors for quality oversight and compliance purposes  Yes  No
- 
- iii. Applicant has capacity to adhere to any corrective action plans imposed by CMS staff or contractors for quality oversight and compliance purposes  Yes  No
- 
- iv. Applicant has capacity to use quality improvement measures to continually review and improve its processes to create program efficiencies and improve the customer experience  Yes  No
- 
- v. Applicant has capacity to test and ensure proper functionality of a –
- d. Secure SAML redirect.  Yes  No
  - e. Secure electronic file transfer.  Yes  No
  - f. Secure web service exchange (e.g., XML gateway).  Yes  No
- 
- vi. Applicant has capacity to conduct functional and performance testing of a learning management system  Yes  No
- 

### Explanation

Please explain any “No” responses to Part III, Section C and indicate the answer(s) to which the explanation applies. (Attach additional sheets if necessary.)



## D. Fee Structure

1. If Applicant becomes an approved CMS vendor, Applicant intends to charge a fee to agent and broker users of the Applicant's training program  Yes  No

2. If the answer to question above is yes, please indicate pricing amount for each curriculum.

Note: Applicant may vary pricing depending on the number of FFE training curricula that the user completes (Individual Marketplace, Small Business Health Options Program (SHOP) Marketplace, Individual Marketplace Training for Returning Agents and Brokers, or a combination of these options) and whether the user is receiving CEUs. Prices must be comparable to similar trainings that are currently available and must comply with applicable state requirements. Currently, FFE training for agents and brokers offered by CMS for both the Individual Marketplace and SHOP Marketplace curricula takes between three and four hours. Individual Marketplace Training for Returning Agents and Brokers offered by CMS takes approximately two hours to complete.

		With CEUs	Without CEUs
i.	Charge for Individual Marketplace Training	\$	\$
ii.	Charge for SHOP Marketplace Training	\$	\$
iii.	Charge for Individual and SHOP Marketplace Training	\$	\$
iv.	Charge for Individual Marketplace Training for Returning Agents and Brokers	\$	\$
v.	Other type of pricing (describe below): (e.g., discounts to members)	\$	\$

### Explanation

Please provide justification for pricing based on training that is currently available, including the number of hours for a user to complete such training. (Attach additional sheets if necessary.)





## IV. Project Staff

### A. Applicant Staff

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All vendors must adhere to the following standards for project staff, including subcontractors. To be eligible for consideration as a vendor, the Applicant must designate the following roles.

1. A project manager, who is directly employed by the Applicant (i.e., not a subcontractor), who will oversee all FFE training operations and has at least two years of experience in overseeing all functional aspects of training, including (1) the development, testing, and hosting of courses and exams; (2) the collection, storage, security, and sharing of data; and (3) providing telephone and web-based technical assistance. The project manager will coordinate with CMS and must have prior experience coordinating with federal or state regulators (or other comparable experience).
2. A web-based training lead with experience managing large scale training projects.
3. A technical assistance lead with experience providing web-based and telephone support to users.
4. An information technology lead with experience hosting a secure data collection and storage system, ensuring organizational compliance with applicable federal and state privacy requirements, and conducting functional and performance testing of a learning management system.
5. A Systems Security Officer with the fundamental knowledge, skills, and abilities needed to define, design, integrate, and manage information system security policies and procedures.
6. Information system staff responsible for data submission that have had previous experience preparing and submitting data files in a specified format to external third-party organizations within the past two years.
7. As appropriate, in terms of sufficiency and experience, organizational back-up staff for coverage of key staff necessary to maintain system accessibility to end-users.

Applicant agrees to appropriately resource this project and provide experienced staff to assume the roles and responsibilities outlined above

Yes  No

## B. Subcontractors

Applicant plans to use subcontractor(s) for FFE training for agents and broker.

Yes  No

If the answer to question above is yes, please indicate the organization name and experience for each subcontractor below. Attach additional sheets if necessary.

Subcontractor #1	
1. Organization Name	
2. Organization Mailing Address	
3. Telephone Number	
4. Website Address	
5. Number of Years in Business (Date Founded)	
6. Number of Years Subcontractor has Worked with Applicant	
7. Experience related to training, including names of projects to which subcontractor has contributed.	
8. Anticipated functions and responsibilities	
Subcontractor #2	
1. Organization Name	
2. Organization Mailing Address	
3. Telephone Number	
4. Website Address	
5. Number of Years in Business (Date Company Founded)	
6. Number of Years Subcontractor has Worked with Applicant	
7. Experience related to training, including names of projects to which subcontractor has contributed.	
8. Anticipated functions and responsibilities	



## V. Applicant Organization Qualification and Acceptance

I certify that:

- I have reviewed and agree that my organization will meet the standards for project staff (including subcontractors), and Rules of Participation from the time that CMS grants conditional approval to become a vendor of FFE training for agents and brokers until such time that my organization's Agent Broker Vendor Agreement with CMS terminates or expires.
- The statements herein are true, complete and accurate to the best of my knowledge. I understand that CMS will be making its determination of my organization's eligibility to participate as an approved vendor of FFE training for agents and brokers based on the information and responses that I have provided.

Name

Title

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Organization

--

Date

Signature

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